



Education and Training Services Resource Guide

A Reference for U.S. Educational Institutions

2015 Edition





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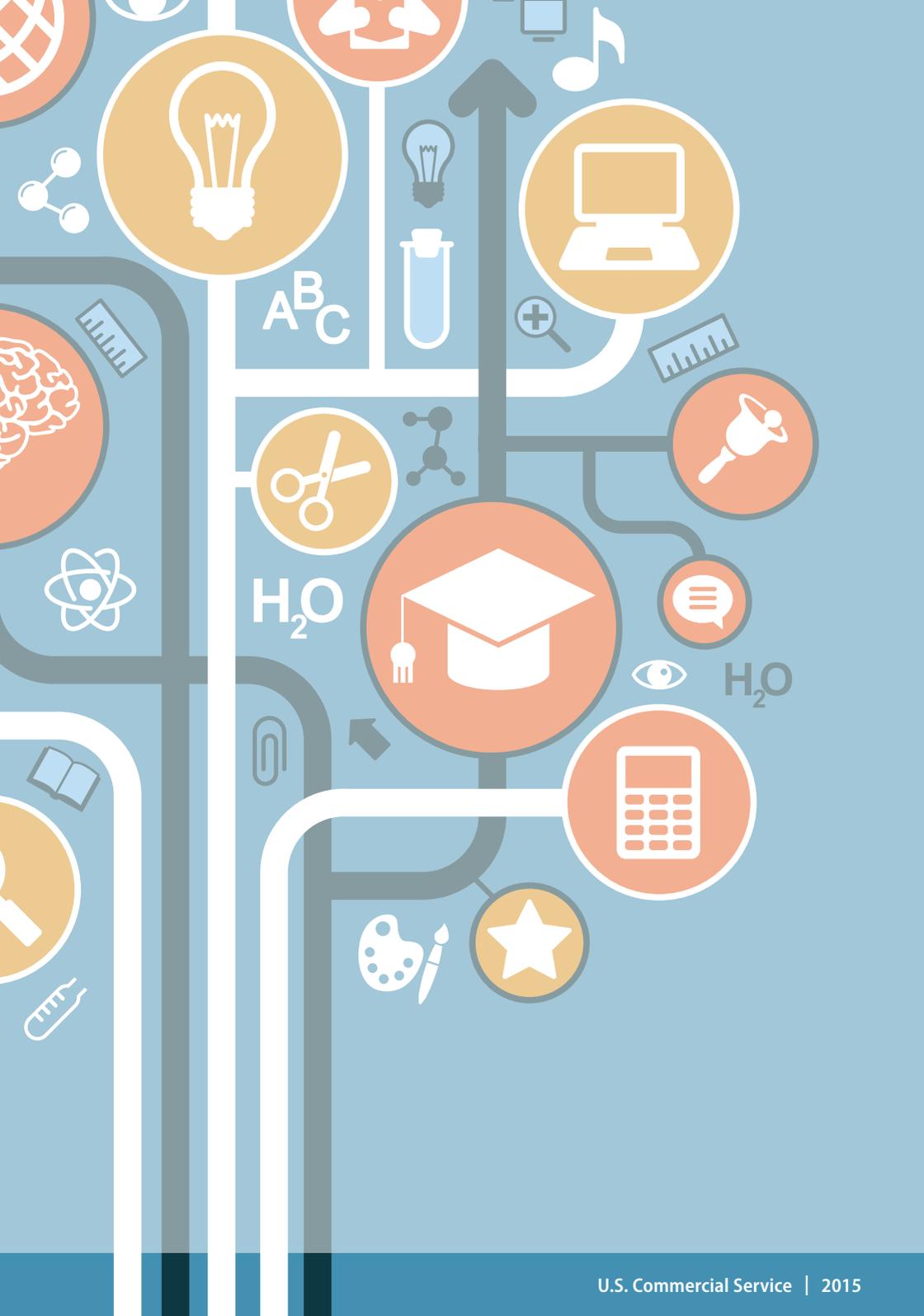
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This book made possible with support from



Introduction

Overview

International students studying in the U.S. contribute USD 26.8 billion to the U.S. economy in tuition and living expenses. The total number of foreign students increased 8.1 percent to 886,052 in 2013–14; about 64.7 percent of students studying in the U.S. use outside sources to fund their international study, making education and training services a valuable U.S. export.

The 2014 Open Doors Survey reports that active recruitment, links with international universities, academic programs targeted at international students, and dual-degree programs are all factors that increase the enrollment of international students. Active recruitment is reported to be the most effective strategy.

This resource guide includes comparable and individual market assessments of countries listed as best prospects for U.S. training and educational services. Assessments are based on observation and market research.

For additional information or market research, including Country Commercial Guides and industry reports, please refer to the Market Research Library at export.gov.

Market Size and U.S. Share by Country (2013–14)	Students Abroad in U.S.	Undergraduate Enrollment (%)	Graduate Enrollment (%)	ESL/OPT/HE Enrollment (%)
Australia	4,377	43.8	23.9	32.3
Brazil	13,286	38.4	23.5	38.1
Canada	28,304	49.2	39.6	11.2
Central America Region	7,497	67.1	20.5	12.4
Chile	2,432	22.4	59.5	18.1
China	274,439	40.3	42.2	17.5
Colombia	7,083	38.3	40.0	21.7
Czech Republic	736	46.2	25.8	28.0
Denmark	1,470	30.3	14.3	55.4
France	8,302	34.5	28.3	37.2
Germany	10,160	29.6	27.9	42.5
Hong Kong	8,104	72.0	12.3	15.7
India	102,673	12.3	59.5	28.2
Indonesia	7,920	68.4	19.3	12.3
Israel	2,457	26.5	54.0	19.5
Japan	19,334	47.4	18.4	34.2
Kazakhstan	2,012	66.8	15.4	17.8
Kuwait	7,288	62.5	8.3	29.2
Malaysia	6,822	69.6	17.1	13.3
Mexico	14,799	56.2	28.3	15.5
Nigeria	7,921	51.0	35.0	14.0
Romania	1,317	32.0	47.5	20.5
Saudi Arabia	53,919	50.0	20.5	29.5
Serbia	966	50.0	31.2	18.8
South Korea	68,047	54.3	27.8	17.9
Spain	5,350	34.5	31.3	34.2
Taiwan	21,266	27.7	47.9	24.4
Thailand	7,341	36.9	45.4	17.7
Turkey	10,821	30.3	52.0	17.7
United Kingdom	10,191	50.0	24.0	26.0
Vietnam	16,579	71.6	15.5	12.9

Source: 2015 Open Doors Report (<http://bit.ly/17LEjvX>)

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

The U.S. Commercial Service (CS) is the export promotion arm of the U.S. Department of Commerce's International Trade Administration. Our global network of more than 1400 trade professionals is located throughout the United States and in U.S. Embassies and Consulates in more than 70 countries. Whether you are looking to recruit your first international student or expand your recruitment efforts to additional countries, we offer the expertise you need to reach out to international students, potential partners, and agents.

Our Services

The CS Global Education Team helps connect you to high school counselors, agents, and potential partner universities; recruit international students; meet companies or government entities; and promote your educational institution internationally. This resource guide is just one of the ways we can provide the information you need to set priorities and plan for international outreach. To learn more about how we can help you, visit export.gov/industry/education.

For more information on how CS can help you increase international student enrollment, please contact your local CS office. A list of offices appears at the back of this guide and at export.gov/usoffices.



Gabriela Zelaya

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Market Intelligence

- Analyze education sector target markets around the world
- Obtain useful information on best prospects
- Obtain background checks on potential partners

Business Matchmaking

- Meet with the best high schools, universities, agents, and other partners
- Find qualified schools and educational organizations
- Connect with agents using interactive webinar technology—without leaving your office

Trade Counseling

- Develop effective market entry and recruitment strategies
- Leverage our trade professionals' expertise for your longer-term international endeavors

Promotion and Exposure

- Identify the right international education fairs for your institution
- Feature your educational institution exclusively and meet key players in the international education field
- Attend an education trade mission led by a high-level U.S. government official

Australia

Overview

Australian students are increasingly choosing to pursue university degrees abroad. A unique mix of professional, academic, athletic, and social opportunities available within U.S. schools has made the U.S. one of the most attractive destinations for Australian students. Although Australia is often overlooked by U.S. university administrators, there is great opportunity to boost international student enrollment with Australian students. Additionally, because many Asian students attend U.S. universities after graduating from Australian high schools, student recruitment in Australia has increasingly attractive potential.

Over the last five years, 25 percent more Australian students have begun studying in the United States. And because Australia and the U.S. have similar primary and secondary education systems, Australian students can relatively easily transition.

Market Entry

Australian students are attracted by the unique characteristics of U.S. university life, including opportunities to play sports, pursue interdisciplinary/liberal arts degrees, and experience life within a close-knit campus environment. Many Asian students who graduate from Australian high schools go on to study in the U.S.

Current Demand

There is a broad academic and geographic distribution of Australians at U.S. universities. Undergraduate Australian students tend to concentrate in fields such as liberal arts and sciences, business, international relations, film, or art; graduate students generally pursue law, business management, or advanced science degrees. Additionally, many Australian student athletes are interested in playing college sports in the United States and obtaining athletic scholarships.

Resources

- EducationUSA (Sydney, Australia), sydney@educationusa.info

Statistics

Capital: Canberra
Population: 22,507,617 (est. 2014)
GDP (USD): 998.3 billion (est. 2013)
Currency: Australian dollar (AUD)
Language: English

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Brazil

Overview

Brazil is the largest country in both South America and the Latin American region and the world's fifth largest country, both by geographical area and by population. It is the largest Portuguese-speaking country in the world, and the only one in the Americas. Bounded by the Atlantic Ocean on the east, Brazil has a coastline of 4,655 miles. It borders all other South American countries except Ecuador and Chile and occupies 47 percent of the continent of South America.

The Brazilian economy is the world's seventh largest by nominal GDP and by purchasing power parity, as of 2013. Brazil continues to pursue industrial and agricultural growth, hoping to tap the development of its interior, its vast natural resources, and large labor pool. Brazil is South America's leading economic power and a regional leader.

The education sector in Brazil is one of the largest in its economy, and generates about USD 75 billion per year. Brazil has around 51 million students currently enrolled in the basic education system (which includes pre-school, elementary and high school), and approximately 6 million students enrolled in higher education institutions. Projections are that in 2015, 10 million students will be enrolled in universities, many of whom will be supported by Federal Government loans (e.g. FIES loans with which the student finance up to 100 percent of its education, and PROUNI loans, through which public school students finance up to 50 percent of their higher education expenses).

Recently reelected President Dilma Rousseff has designated the education sector as one of her highest priorities. The Brazilian Government is investing in a wide range of programs to support individuals seeking education including study abroad programs. One of the main programs is the government's Scientific Mobility Program (formerly called "Science without Borders"), that concluded its first phase in 2014. Before being reelected, President Rousseff announced a second phase of the Scientific Mobility Program through which additional scholarships

Statistics

Capital: Brasília
Population: 202,656,788 (est. 2014)
GDP (USD): 2.416 trillion (est. 2013)
Currency: Real (BRL)
Language: Portuguese (Brazil)

Contact

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will be provided to undergraduate and graduate students from Brazil to spend one year at colleges and universities abroad. The main destination of the Scientific Mobility Program so far is the United States, with more than 26,000 Brazilian students already completing fully government-funded study abroad experiences in the United States to date. To register to receive students through the program, colleges and universities should register with the Institute of International Education (IIE).

According to IIE the number of Brazilians going to the U.S. to study has increased 22.2 percent from 2012–13 to 2013–14. This significant increase was, in large part, due to the Scientific Mobility Program. In 2013–14, Brazil sent 13,286 students to the U.S. making it the South American country that sent the most students to the United States in both 2012–13 and 2013–14. Brazil sent 8.8 percent more undergraduate students, 4.1 percent more graduate students and 80.7 percent more non-degree students to the U.S. in 2013–14 than compared to the previous period.

Market Entry

Since the launch of the Scientific Mobility Program, Brazilian educational institutions have been overwhelmed by the large number of foreign institutions coming to Brazil in order to promote their programs. Brazilian institutions seek to engage in two-way exchange programs and are more receptive to that kind of approach than to institutions that are only focused on recruiting Brazilian students. Traditional markets such as São Paulo and Rio de Janeiro are still offer opportunities but the South, Central and Northeast regions of the country offer numerous opportunities as well, and are not so overwhelmed by international institutions. Doing business in Brazil is a matter of establishing a relationship. Agreements cannot be completed after only a single contact.

Current Demand

English language programs for professional development are excellent to market in Brazil as the demand for bilingual business professionals proficient in English is continually growing. Study exchange programs for undergraduate students and graduate students are also another service in high demand.

Brazilian students are more interested in exchange programs rather than in going abroad to take their full undergraduate coursework. The emerging trend in this segment is the possibility of studying one or two years abroad and returning to Brazil to complete studies, receiving a certificate issued by a Brazilian institution accredited by the Ministry of Education. As such, the market exists for 3+1 and 2+2 programs.

The Ministry of Education is in the early stages of creating a system to accept foreign university degrees. The lack of such a system has been a challenge to the further expansion of long-term study abroad programs. Once the system is established, foreign universities will have to

register to be included in the Ministry's list, which will create a fast-track system for students to have their foreign diplomas recognized.

For the next decade, the fastest growing segment of the domestic educational market in Brazil will be short term vocational courses due to government investments in technical schools and courses for high schools students and adults. In 2011, the Government of Brazil launched PRONATEC (National Program for Technical Courses) and designated USD 3.5 billion for the program. Since its inception, PRONATEC has funded technical and vocational courses for 2.5 million students, and expects to fund additional 8 million students' courses. PRONATEC only funds courses offered in Brazil. Foreign universities may take part in it through establishing partnerships with Brazilian Higher Educational Institutions. The Brazilian National Confederation of Industry, through its Technical School, is also helping the government on offering the courses.

Brazilians are also seeking short term customized programs either for individuals or for company trainings. Ability to provide training programs in Portuguese in Brazil is an important selling point when offering professional development courses to Brazilian companies.

Resources

- Institute of International Education, iie.org
- EducationUSA Brazil, educationusa.org.br
- Brazilian Ministry of Education, mec.gov.br



Canada

Overview

Canada and the United States share the longest border in the world—5,500 miles long. They also share the world's largest trading relationship, with approximately USD 1.9 billion crossing the border each day. Canada and the United States are excellent neighbors and the free flow of people and goods demonstrates this strong relationship.

Canada is the fifth largest sender of students to the United States. In 2013–14, 28,357 Canadians studied in the United States, up 3.5 percent from 2012–13.

Market Entry

Because Canadians and Americans share a special relationship (for example, Canadian students do not need to apply for student visas to come to the U.S.), it is in the best interest of American universities to establish Canadian-specific tuition agreements. Canada and the United States must maintain mutual understanding and positive economic outlook.

Educational exchange is an excellent way to ensure a positive future. For example:

- More cross-border tuition agreements for in-state tuition for Canadians
- Athletic scholarships
- Other Canadian-specific scholarships and funding
- Increased exchange programs
- Marketing of the United States as an attractive foreign destination
- Targeting foreign-language teaching opportunities to French-speakers

Statistics

Capital: Ottawa
Population: 34,834,841 (est. 2014)
GDP (USD): 1.518 trillion (est. 2013)
Currency: Canadian dollar (CAD)
Language: English (official), French

Contact

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Current Demand

Canada has an excellent higher education system, thus Canadian students are attracted to the United States for very specific reasons. Canadian universities are monitored by a ministry of education that keeps tuition lower than U.S. universities; however, they also do not provide athletic scholarships. Canadians are by far the largest number of international student-athletes in the United States. They are attracted by scholarship opportunities and have large attendance at universities that offer cross-border tuition deals. Aside from reduced tuition, specialization and prestige are the biggest attractions. Ivy Leagues universities have large numbers of Canadian students, as do unique private universities offering programs/ specializations difficult to find in Canada (art/design schools, religious institutions, optometry, etc.).

Resources

- EducationUSA Canada, ottawa@educationusa.info

Central America Region

Overview

The United States is a leading destination for Guatemalan, Salvadoran, Honduran, Nicaraguan and Costa Rican students. The number of Central Americans studying in the United States reached a total 5,745 during the 2013–14 academic year, representing an increase of 8.2 percent compared to the previous year. Currently, the States with highest numbers of Central American students are Texas, New York, California, Massachusetts, Florida, Louisiana, Georgia and Virginia.

There are several key reasons why Central American students choose U.S. Higher Education Institutions:

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

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In addition, studying abroad represents an opportunity to be more competitive and increases the possibility for better employment in national or multinational corporations.

Main competitor countries are Canada, Mexico, Spain, Germany, France, Taiwan, United Kingdom, Chile, and Argentina.

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

Undergraduate studies are preferred, followed by graduate and non-degree programs. English language programs have high potential as there is very low English proficiency in the entire region. Although, Costa Rica has a comprehensive program to become a bilingual country by 2017, it is ranked #43 in the 2014 EF English Proficiency Index, followed by Guatemala in position 51, and El Salvador in 53. EF English Proficiency Index evaluates the English skills of 63 countries worldwide.

Market Entry

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

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

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

To meet market preferences, all marketing material and program information is available in Spanish.

Current Demand

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

- U.S. universities and community colleges with tuition fees lower than USD 20,000
- English Language Programs (from one month up to one year) for students, teachers, and adults
- Summer camps
- Undergraduate, Graduate and Master Programs
- Online programs

Resources

- EducationUSA Costa Rica, marcia.herra@centrocultural.cr
- EducationUSA El Salvador, stadvisor@hotmail.com
- EducationUSA Guatemala, vjuarez@iga.edu
- EducationUSA Honduras, educationusaihci@yahoo.com
- EducationUSA Nicaragua, advise@ccnn.org.ni

Chile

Overview

Chile is considered to be one of the most stable developing markets in its region with an impressive average growth rate of over 5 percent per year in real terms since 1990. Chile and the U.S. entered a Free Trade Agreement in 2004, which increased bilateral trade 340 percent. Chile is also progressive in its development and is continuing to liberalize economic activity through FTAs and supporting the flow of open markets.

Becas Chile, created in 2008 as a response to the need and urgent requirement to have not only highly productive but also more creative, innovative and entrepreneurial academics, professional and technical Training Center graduates, offers 2,500 scholarships in all areas of knowledge. The programs are available for postgraduate degrees, internships for technical graduates and teaching programs. 23 percent of the students that apply to these scholarships choose the U.S. because of its proximity to Chile and its reputation in high education standards. With the U.S. and Chile increasing bilateral trade and FDI, we can look forward to a progressive future between the U.S. and Chile.

Market Entry

Although the Chilean market is relatively small compared to other international markets, Chile is stable and a great opportunity to break into South American markets. There is also additional government support as they are committed to education exchange and professional development between the U.S. and Chile.

Current Demand

English language programs for professional development are excellent to market in Chile as the demand for bilingual business professionals proficient in English is continually growing.

Statistics

Capital: Santiago
Population: 17,363,894 (est. 2014)
GDP (USD): 335.4 billion (est. 2013)
Currency: Chilean peso (CLP)
Language: Spanish

Contact

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Study exchange programs for undergraduate students and graduate students are also another service in high demand. Materials used to market U.S. educational programs should be printed in Spanish or supported by a local Spanish speaking representative.

During the last few years, the Chilean superior education has undergone great changes. Today, 37 (4 in 10 people 18–24 years old) enrolls in higher education; and every year new generations of young people who finish secondary education are determined to study in a University, Professional Learning Institute, or Technical Training Center.

English Courses (ESL) are the most in-demand products in terms of foreign study. Generally, from 22 years old upwards, students go to study English abroad. Most students have little or no English, and therefore the most in demand course is a general English program. However, the demand for specialized English programs for professionals is increasing.

Many universities in Chile support exchange programs especially to U.S. universities because of its relatively close location and English speaking opportunities.

China

Overview

U.S. colleges and universities remain the most preferred overseas destination for students from China, which remains the leading source of foreign students in the United States. The number of Chinese students studying in the U.S. increased from 235,597 in 2013 to 274,439 in 2014, according to the 2014 Open Doors Report on International Education Exchange which constitutes a 16.5 percent increase from the previous academic year.

While a slim majority of Chinese students are enrolled in graduate programs in the U.S., the number of undergraduate students continued to increase from 2013–14. According to data released by Open Doors, 40.3 percent of the Chinese students studying in the U.S. are at the undergraduate level, while 42.1 percent of the Chinese students are studying here are at the graduate level. With the soaring number of undergraduate Chinese students in the U.S., the number of Chinese high school students is also expanding rapidly between 2013–14.

Market Entry

There is no doubt that the desire of Chinese students to enroll in U.S. institutions is high, fueled by increasing disposable incomes of Chinese students and their families. Although the majority of Chinese students are still pursuing degrees in business, engineering and sciences, there appears to be an increase in demand for vocational classes, and utilization of community colleges to upgrade skills to increase earning potential as well.

U.S. institutions will have to remain active in the promotion of American education in China, as competition for Chinese students from other English-speaking countries increases and as the expansion of the domestic education market in China creates an increasing number of opportunities for students to pursue higher education without leaving China.

Statistics

Capital: Beijing
Population: 1,355,692,576
GDP (USD): 13.39 trillion (est. 2013)
Currency: Renminbi (RMB)
Language: Mandarin Chinese

Contact

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Current Demand

The most popular fields of academic study for Chinese students include:

- Business/management
- Math
- Engineering
- Computer science

Notably, summer camp programs have been popular amounts younger aged Chinese students in recent years. The programs focus on English training, experiencing local culture and exploring school and college campuses which are of primary interest to Chinese students.

Trade Events

- China International Education Exhibition (CIEET), www.cieet.com/en
- China Education Expo, chinaeducationexpo.com/english

Resources

- Ministry of Education—Department of International Cooperation and Exchanges, bit.ly/1yo2484

Colombia

Overview

U.S. Colleges and Universities remain the preferred overseas destination for Colombian students, even though there is significant competition from other countries like United Kingdom, Spain, France and Argentina. There are several reasons that make U.S. a leading destination: higher employment opportunities, the chance to improve English skills and high quality of education. The preferred host states for Colombian students are California, New York, Texas, Massachusetts, Illinois and Florida.

According to the Institute of International Education, Colombia is ranked 22nd in the world for sending students to the United States and among South American countries, Colombia ranks only second to Brazil.

Market Entry

Not only can a greater number of Colombian students now afford to study in the U.S., but newly created employment opportunities in Colombia also make American degrees even more valuable. International education is highly valued in Colombia, a recent survey of employers found that 58 percent preferred to hire people who had earned advanced degrees abroad.

The approval of the free trade agreement between the U.S. and Colombia has increased foreign investment and the need of academic mobility and exchange. This will result in the increase of the enrollment of Colombian students at American academic institutions in the foreseeable future.

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 will be vital to the country's economic growth and global competitiveness over the long term. U.S. educational

Statistics

Capital: Bogotá
Population: 46,245,297 (est. 2014)
GDP (USD): 526.5 billion (est. 2013)
Currency: Colombian Peso (COP)
Language: Spanish

Contact

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services will also expose more Colombians to American culture, further strengthening ties between the two countries.

There are concrete opportunities to increase the number of Colombian students attending U.S. Universities. Those wishing to attract Colombian students should consider actively increasing recruitment campaigns in order 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 around the country. Advising centers are located at nine binational centers, the Fulbright commission and COLFUTURO.

Current Demand

In academic year 2012–13, 6,543 Colombian students traveled to the United States to study. That constitutes a 3.9 percent increase compared with the previous year. The primary reasons for this increase is that the students and parents are attracted by the quality of education, the opportunity to improve English skills, the abundance of specialized programs and improved employment prospects with U.S. or multinational corporations.

The American Embassy in Bogotá has set a goal to double the number of Colombian students in the following years supporting technology projects such as Ed, a 24/7 virtual adviser in Spanish and various micro grant scholarships for English Language learning. The approval of the free trade agreement between the U.S. and Colombia has increased foreign investment and the need of academic mobility and exchange.

Additionally, as part of the President Obama’s initiative “100,000 Strong in the Americas,” launched in March 2011, an initiative which intends to increase the number of Latin American Students in the U.S. In the last two years, the U.S. Commercial Service in cooperation with the Education USA offices in Colombia has supported various education fairs that included the participation of U.S. boarding schools, Universities and ELS institutions, in order to promote their programs in Colombia.

Given the demands of modern day society, the number of undergraduate and graduate Colombians in the United States is increasing slowly. Colombians know it is difficult to obtain a high executive position within the government or important national or multinational companies without proficient English skills and/or a Master’s Degree. The most demanded field of studies are those focused in business administration, management, finance, banking, marketing, and engineering.

Under government-to-government or private agreements, both public and private universities in Colombia have developed programs with universities in the United States, Europe, and Latin

America. Priority is given to projects that foster post-graduate programs for training professors as well as research to enhance teaching.

Most scholarships are awarded through two institutions: The Colombian Institute for Educational Loans and Technical Studies Abroad (ICETEX). This organization is dedicated to finance higher education through the system of payback financial aid that allows students to start or continue their higher education either in country or abroad. During 2013 ICETEX awarded 837 scholarships for Master and Ph.D. programs and COLFUTURO which is a non-profit organization that provides funds to Colombian professionals/students to study abroad. Their loan program is available to students who have been accepted to Graduate, Master or Ph.D. programs in foreign universities. During year 2013 COLFUTURO awarded 1,112 scholarships: 956 for Master programs and 156 for Ph.D. 246 of those scholarships were for programs in the U.S.

COLFUTURO also has agreements with many universities such as American University, Carnegie Mellon—Heinz College, Columbia, Duke, Johnson School of Management—Cornell University, Kogod School of Business—American University, The Krannert School of Management—Purdue University, Tulane University, and Harvard University.

Resources

- Institute of International Education, iie.org
- Colombia Ministry of Education, mineducacion.gov.co
- Colombian Institute for Educational Loans and Technical Studies Abroad (ICETEX), www.icetex.gov.co
- COLFUTURO, colfuturo.org
- EducationUSA, educationusa.info
- National Administrative Department of Statistics (DANE), dane.gov.co

Czech Republic

Overview

The Czech Republic offers great recruitment potential. High quality educational programs, coupled with having English as the standard second language, produce a large pool of highly qualified candidates for both undergraduate and graduate studies in the U.S.

Study abroad programs are popular in the Czech Republic. Czechs have discovered travel and study abroad in the '90s after the fall of communism. Young Czechs are eager travelers with a desire to gain experience by living and studying in another country.

Over the last decade, we have seen a decline in the number of Czechs studying in the U.S., from a top figure of 1,180 students in 2003 to 701 students in 2012, largely due to the Czech Republic's entry into the European Union (EU), availability of EU grant programs for studying in the EU, and stricter travel procedures to the U.S. following the events of September 11, 2001. The year 2013 brought a positive change in this trend with a record 11 percent increase in the number of Czechs studying in the U.S., to 776 students, which dropped to 736 in 2014.

U.S. schools are regarded as highly prestigious and attractive to Czech students and the U.S. has a good chance of regaining its former position as a preferred location for higher education.

The level of knowledge of U.S. admission systems at selective universities has been increasing, especially at the best national high schools. More well-qualified high school students are seriously interested and well prepared for the admission process. The Czech Facebook community is booming and this network has become one of the major resources of information, as well as a place for social interaction and sharing experience. Twitter and other social networks are far behind. Selected students can obtain scholarships from several new private foundations.

Statistics

Capital: Prague
Population: 10,627,448 (est. 2014)
GDP (USD): 285.6 billion (est. 2013)
Currency: Czech koruna (CZK)
Language: Czech

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English is the standard second language in the Czech Republic and is taught in schools from grade 3 onward. Approximately half the Czech population speaks a foreign language. While younger people tend to speak English, there is widespread knowledge of German or Russian among the older generation. A recent government decision that will make English language mandatory for primary school students should improve the ability of Czech students to study at U.S. universities and colleges. Currently 27 percent of all Czechs speak some level of English and 10 percent are reported to be fluent. The Czech Republic is the leader amongst Central European countries (and most of Eastern Europe as well) in the percentage of population speaking English as a foreign language. However, it still lags behind the Netherlands and the Scandinavian countries, where over 50 percent of the population speaks English.

Market Entry

The U.S. Commercial Service at the U.S. Embassies in the Czech Republic, Hungary and Poland, in cooperation with EducationUSA and the Fulbright Commission, is organizing educational fairs in their respective countries in spring 2016. This is an opportunity for representatives of regionally accredited U.S. institutions of higher education, both undergraduate and graduate, to explore the markets of Central Europe. The fair in Prague will connect U.S. educational institutions with prospective students and potential institutional partners in the Czech Republic. The stop will include embassy briefings, one-on-one appointments with potential partners, and student fair.

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

U.S. universities may also make use of the EU-funded Erasmus Mundus cooperation and mobility program. Erasmus Mundus Joint programs of outstanding academic quality are designed and implemented by a consortium of European universities from at least three different countries. Consortia may also include universities from other parts of the world, including the U.S. Scholarships are open to students and academics from all over the world.

More and more Czech companies are following the lead of global companies based in the Czech Republic and are requiring English language capabilities from their employees. This trend creates demand for English as a Second Language (ESL) studies in the Czech Republic. However, European countries appear to be a more attractive destination for short term ESL studies especially given the price and distance advantages. The declining dollar has ameliorated the situation somewhat recently. Strong demand still exists for programs at the elite U.S. universities.

Current Demand

Currently, three-quarters of university students going abroad take advantage of the Socrates–Erasmus program to study in Europe. University studies in the U.S. are most attractive for academically talented students and student athletes who are able to take advantage of scholarships.

High school exchanges to the United States can be facilitated through an organization (non-profit or commercial) or can be self-organized. Czechs interested in studies in the U.S. need to apply for the correct visa. An F1 Visa or Educational visasis for individuals who want to study or conduct research at an accredited U.S. college or university; a J1 Visa or Exchange Visitors Visa is for International students who want to do an internship in the U.S., approximately 50 percent of which are for academic purposes.

The majority of university students are interested in economic and humanities subjects, technical areas rank in third place. Around 45 percent of Czech students in the U.S. study at the undergraduate level, 30 percent in graduate programs, and 15 percent opt for non-degree studies.

Resources

- Ministry of Education, Youth, and Sport, msmt.cz/?lang=2
- Ministry of Education—Foreign Services, dzs.cz/en
- Fulbright Commission, fulbright.cz
- Study in the Czech Republic, www.studyin.cz
- National Agency for European Education programs (including Erasmus Mundus), naep.cz/?language=en

Denmark

Overview

Denmark enjoys a renowned standard level of education, with 44.5 percent of Danish students undergoing higher learning. English is the standard second-language taught in Danish public schools, and classes begin in the grade 3. Denmark's educational culture is particularly forward-thinking with government financing of all public education through the university level and globalized, with study abroad programs available to their youth as early as the 10th grade.

Contributing to the high rate of education in Denmark, every Dane over the age of 18 is entitled to public support for his or her higher education—regardless of social standing.

Importantly, Danes who study abroad have their tuitions paid by the Danish government up to the tuition of an equivalent Danish school, and are allowed to continue to receive the state stipends and loans.

International exchange programs exist between the U.S. and Denmark including the Danish–U.S. Bilateral Agreement on Vocational Education and Training, which includes subsidies to support vocational studies abroad, and the EU–U.S. Atlantis Program, which promotes transatlantic cooperation and mutual recognition of accreditations amongst participating universities.

Market Entry

The biggest opportunity for universities to attract Danish students is through short to medium term studies. While there has been a small increase in the number of students taking full degrees in the U.S. the vast majority of students apply for 4-6 month exchanges as part of a semester abroad programs at their universities.

Statistics

Capital: Copenhagen
Population: 5,569,077 (est. 2014)
GDP (USD): 211.3 billion (est. 2013)
Currency: Danish krone (DKK)
Language: Danish

Contact

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As Danish higher education is centralized around few but large universities, although multi-faculty, university educational fairs will enable broad reach and provide direct contact. A local representative, aware of procedures and formalities, will be able to provide the best guidance and present the student with interesting possibilities.

It is important to note that Danish bachelor's programs and State Grant for undergraduates are three years long. This may incentivize to focus on graduate degrees and exchange opportunities.

Current Demand

Approximately 9,000 Danes study abroad annually and roughly 1000 in the U.S. A large majority of these students are focused on business, and political science, social sciences, and the humanities.

While most Danes focus on Business, Politics, and the Humanities abroad, the tendency is to find schools that offer programs that are unavailable or otherwise not as high quality in Denmark.

Trade Events

- EDU Denmark International Days, edu-danmark.dk/english
- KILROY Education Road Show, education.kilroy.dk
- Nordic Study Abroad Conference, nordic-sac.com
- Danish Students Abroad, dsabroad.dk

Resources

- Danish Ministry of Higher Education and Science, ufm.dk/en

France

Overview

In France, the United States is known to be home to some of the world's best colleges and universities. As English is the language of business and diplomacy in the European Union, there is growing interest in studying in English speaking countries, such as the United States. In the 2013–14 academic year, 8,302 students were studying in the United States. France is the fifteen leading place of origin for students coming to the United States. Accordingly with the well thought out strategy, U.S. schools have a unique opportunity to attract French students.

Market Entry

American educational institutions can take advantage of the importance placed on English language abilities as well as the current state of the French labor market. As of November 2014, the unemployment rate in France continued to climb reaching 10.2 percent with a 22.8 percent unemployment rate for those less than 25 years old. U.S. schools can benefit of this current employment trend which has led to a “race for diplomas” among French students, as studying abroad has become a channel for graduates to escape unemployment.

The majority of universities is public and nearly free but has become more crowded, owing to the lack of entrance requirements. The quality of these schools has suffered as a result; a degree from one of them is no guarantee of a good job. On the other hand, French graduates of high schools (lycées) possessing the wherewithal to enroll in an American school may find in the near future that they have an easier time getting into one of America's top 100 universities than into one of France's Grandes Ecoles (the extremely competitive demands of the prestigious French higher education schools which produce most of France's social elite,), in addition to receiving all the benefits accorded by studying in a new cultural environment, and in the United States in particular.

Statistics

Capital: Paris
Population: 66,259,012 (est. 2014)
GDP (USD): 2.276 trillion (est. 2013)
Currency: Euro (EUR/€)
Language: French

Contact

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Also all courses are now adapted to the (new) European format, called LMD (L for “licence,” M for “Maitrise,” D for Doctorate) Bachelor-Master-Doctoral Programs and are divided in semesters and most “unités de valeur” are pooled among all European universities, in order to encourage students to accomplish part of their courses in a foreign university.

American institutions may also benefit from niche opportunities:

- Second- and third-tier cities: Most U.S. colleges and universities focus their recruitment efforts in Paris. Recruitment efforts that include other cities in France in addition to Paris, particularly those with strong universities or a sister city connection generally yield effective results.
- E-learning: The ability to earn college credit through internet courses has been booming in the United States in recent years. The flexibility of taking courses via an online college site is an area which could be profitable for American universities looking to attract French students eager to strengthen their resumes and diversify their studies.
- Intensive English language programs: Today, English has become an essential tool for French students seeking employment after graduation, a market which could be developed by U.S. schools.

Current Demand

Best prospects include:

- Intensive “American” English language training programs (summer programs for students or adults)
- Programs in business administration
- One-year university programs for French high-school graduates (post baccalaureate), usually between graduation and entry into French university
- Secondary boarding schools
- Work/study programs (internships)
- Academic summer camps
- Undergraduate and graduate degrees.

Trade Events

- AAWE/COIS—Paris College Days, aaweparis.org
- l’Etudiant, letudiant.fr
- Studyrama, studyrama.com

Resources

- Fulbright Commission, fulbright-france.org

Germany

Overview

Germany, with a population of 80.8 million boasts one of the largest economies in the EU. Germans are well educated. During their schooling, over 90 percent of Germans study English at some point. English is the first foreign language in German education. English language courses are mandatory for almost every German student, the degree of difficulty depending on the school level. English is taught in primary school starting in grade 3 or earlier.

Experience abroad is often a key advantage for students to compete for employment and further educational opportunities in their homeland and internationally. Employers recognize this and often give an edge to job applicants with international experience or education on their resumes. Because of this, many German students believe studying or interning abroad is a must in order to build their resume, become proficient in a foreign language, and make key international contacts.

As European universities implement the Bologna Process and shift to a three-tier bachelor/master/doctorate system of education; credits and degrees are becoming easier to compare with those of U.S. universities. This new system can greatly aid foreign study and exchange in the United States. However, a number of hindrances to German students studying in the United States remain. German students who have been accepted into a program of study in the United States need a visa before their departure.

Market Entry

One of the best methods 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.

Statistics

Capital: Berlin
Population: 80,996,685 (est. 2014)
GDP (USD): 3.227 trillion (est. 2013)
Currency: Euro (EUR/€)
Language: German

Contact

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Germany represents good recruitment opportunities for short term programs because of English language knowledge, high per capita income, ever-stronger business ties between the two countries, and an extremely strong secondary exchange program.

The United States is an obvious destination for people looking to develop their English language skills. According to the Open Doors 2013 Report, there were over 39,900 participants in intensive English programs in the United States in 2012–13, up 2.8 percent from the previous year.

U.S. educational institutions may work with exchange organizations in Germany such as the German Academic Exchange Service (DAAD) and the Fulbright Commission, private sector recruiters and advisors and through the eight EducationUSA centers of the U.S. Department of State in Germany. There are also a number of recruitment events.

Current Demand

Study abroad is particularly attractive for German students studying law, economics, business, human medicine, and social sciences. More than one-third of German students prefer to study in an English-speaking country, with the United Kingdom and United States being the most popular study abroad destinations.

It is common for German students to study abroad in high school as well as university, and Germany sends the most students on high school exchanges to the United States. 6,585 German students spent at least one semester at an American high school during the 2013–14 academic year.

Trade Events

- StudyWorld (April 24–25, 2015, Berlin), studyworld2015.com/en
- QS World MBA Tour, topmba.com/events/qs-world-mba-tour
- EducationUSA Fairs (April 16, 2015, Hamburg; April 18, 2015, Heidelberg), educationusa.de/de/for-americans
- International College Days, collegeday.de

Resources

- Deutscher Akademischer Austauschdienst (German Academic Exchange Service), daad.de/en
- Fulbright Kommission, fulbright.de

Hong Kong Special Administrative Region

Overview

With 8,104 Hong Kong students studying in the U.S. during the 2013–14 academic year, Hong Kong ranked as the 17th leading origin of international students in the U.S. 72 percent of these are undergraduate students while 12.3 percent are graduate students.

Hong Kong's education system which went through a major restructure in 2009–10, is now more in line with the American system than the British system, i.e. three years of junior secondary is followed by three years of senior secondary. This leads to the Hong Kong Diploma of Secondary Education (HKDSE) exams where students gain admission to a range of post-secondary, vocational and tertiary courses offered by local schools based on their examination results.

As the number of places available for undergraduate degrees is substantially less than the number of students who actually fulfill the entry requirements for university, the popular options are to study abroad, or to attain an Associate Degree or a Higher Diploma, and then proceed with a degree course later on.

Market Entry

Local parents and students are beginning to recognize the academic excellence of colleges outside the Ivy League, this is the result of an increasing number of American schools vigorously promoting themselves via education fairs, and by meeting with high school counselors and students face-to-face to gain exposure and raise their profile.

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

Statistics

Population: 7,112,688 (est. 2014)
GDP (USD): 381.3 billion (est. 2013)
Currency: Hong Kong dollar (HKD)
Language: Cantonese, English,
Mandarin Chinese

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Current Demand

The most popular fields of study are Business/Management (24.8 percent of total fields of study), Social Sciences (16.4 percent), Fine/Applied Arts (10.2 percent), Engineering (7.4 percent), Math/Computer Science (6.6 percent), and Physical/Life Sciences (6.2 percent).

Apart from 4-year colleges, there is an emerging market for 2-year community colleges where admission requirements and tuition fees are comparatively lower. Hong Kong students tend to be more interested in community colleges with guaranteed transferable credits to universities.

Trade Events

- U.S. Higher Education Fair, iie.org/en/offices/hong-kong
- Education and Careers Expo 2015, hktdc.com/hkeducationexpo
- Hong Kong International Education Expo, newwayfairs.com

Resources

- Hong Kong Government Education Bureau, edb.gov.hk/en

India

Overview

The emphasis on higher education in India has significantly grown in the last two decades. As per University Grants Commission (UGC) statistics from 2014, there are 33,023 colleges, 12,748 diploma-granting institutions and 659 universities in India. These universities include 312 state universities (established by the state governments), 129 deemed universities (a status of autonomy granted to high performing institutes and universities by the Department of Higher Education), 173 private universities, 45 central universities (established by the Department of Higher Education), and institutes of national importance, such as Indian Institute of Technology (IIT), and Indian Institute of Management (IIM). All the above institutions offer a wide range of degree and diploma programs.

UGC regulates the higher education system in India by providing grants to universities and by providing coordination, determination and maintenance of standards in institutions of higher education in India. While the right of conferring/ granting degrees in India is vested with universities, the UGC regulations apply to all universities established in India under the central and state governments.

Higher education in India can broadly be divided into two segments—regulated and unregulated. The regulated segment includes central and state universities, private universities, technical institutions, private/professional colleges and research institutions. The unregulated segment includes vocational training, finishing schools, professional development and training and coaching classes.

Technical education which includes programs such as engineering, technology and management is governed by the All India Council of Technical Education (AICTE). Higher education in India is also governed by the other 13 professional councils established for the regulation of education in specific fields. Some of the councils and the specific fields that they govern include Council of Architecture, Pharmacy Council of India (PCI), Central Council of Indian Medicine (CCIM), Bar Council

Statistics

Capital: New Delhi
Population: 1,236,344,631 (est. 2014)
GDP (USD): 4.99 trillion (est. 2013)
Currency: Indian rupee (INR)
Language: Hindi, English

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of India (BCI), Indian Nursing Council (INC), Medical Council of India (MCI), and Distance Education Council (DEC).

India's Higher Education system is the world's third largest with respect to student enrollment, next only to China and the USA. According to a recent PwC report, the factors which have contributed to the exponential growth the sector has experienced in India are:

- Huge demand/supply gap in the sector;
- Greater number of private players venturing into the Education sector;
- Growth of services sector, particularly the Information Technology sector, leading to demand for skilled workers;
- Increasing FDI into the sector;
- Increase in Internet based education methods;
- Increased ability to capitalize on brand and reputation;
- Opportunity to enhance scale and diversify risk by tapping new markets for entrepreneurs.

India has emerged as a strong market for investment in the training and education sector, due to its favorable demographics (young population) and being a services-driven economy. The growth in sectors such as software development, pharmaceuticals, life sciences and healthcare, is also another reason why India should invest into learning and training segment.

Market Entry

India is primarily a market for U.S. graduate institutions interested in attracting students. Though there is some interest in U.S. undergraduate studies and transfer admissions, limited scholarships and the increasing cost of education are major deterrents. However, with the increase of international schools in India, the interest in undergraduate study in the United States is expected to increase in the years to come. India also offers substantial opportunities for U.S. universities and other institutions of higher learning to establish schools, programs and curriculum in India. According to industry experts, the higher education sector in India, which is currently at USD 8.38 billion, is expected to grow at a compound annual growth rate of 18.0 percent through 2020 and to reach USD 42.17 billion.

The number of students enrolled in higher education institutions in India in 2012 was 16.9 million and was projected to increase further over the next three years; there are increasing doubts that India will have enough purely domestic education institutions to meet this demand. The United States, with over 4,000 accredited institutions of higher learning, has the capacity to offer access to high quality education to students in a broad range of fields. Community colleges would also have its own share of international students added to the undergraduate student pool.

According to the FICCI report on Higher Education—Vision 2030, Indian universities excel in research in areas such as bioscience, environment and climate change. Indian Universities have adapted the model of blended research in collaboration with top global Universities

in a cost effective way. The Massive Open Online Courses (MOOCs) model allows millions of students to have access to the high quality content and curriculum from the global schools through information and communication technology. This model also provides life-long learning opportunities for working professionals and students across the country by way of recorded lectures of renowned faculty, a diverse peer group, and certification from reputed universities—global and Indian.

There are several possible collaborative opportunities for non-Indian universities with Indian educational institutions.

Twinning Programs

In a twinning arrangement, a student undertakes a study course at his own institute in India for a set period and later spends equivalent time in the overseas institution.

Service Providers

Non-Indian universities can enter into tie-ups with Indian Educational Institutions for providing expertise and services such as faculty for teaching, curricula, affiliations, etc.

Distance Education Programs

The e-learning or the distance education program offered by many non-Indian universities to Indian students who are not physically present in a traditional educational setting such as a classroom, using technologies like the Internet.

Student Exchange Programs

With an intention to enhance cross cultural exposure and also provide a global perspective to students, the student exchange programs encourage Indian students to spend short time periods generally ranging from two weeks to a full term/semester at the campus of an overseas university.

Faculty Exchange Programs

Faculty exchange programs are devised with intent to enable the teaching staff to teach or conduct research for short periods at the campus of the counterpart university/college. This option benefits the faculty by providing exposure to a varied culture as well as an opportunity to exchange ideas and observe a variety of styles in a different setting.

Joint Research Programs

The purpose of these programs is to advance collaborative research between non-Indian universities and Indian Institutes while providing opportunities for young researchers to hone their skills.

Representatives and Recruiters

Setting up entity in India/entering into arrangements with Indian parties for assistance with student recruitment activities, where the objective is to counsel students from India and encourage them to enroll with the university overseas.

Current Demand

In the 2012–13 academic year, 96,754 graduate and undergraduate students from India were studying in the United States. India is the second-leading place of origin for students coming to the United States. Students from India make up approximately 11.8 percent of the total foreign student population in the United States. Of the 96,754 students from India, 56.4 percent graduate students, 1.6 percent opt for other programs and 28.8 percent are classified as pursuing Optional Practical Training (OPT) in the United States. The international students' data in different fields of study shows a considerable increase not only in streams like engineering and business, but also in the health professions and life sciences fields.

There was an increase in student visa demand in fiscal year 2013 despite the extra financial burdens imposed by rupee devaluation, particularly during a severe decline in the value of the rupee. The United States-India Education Foundation (USIEF) attributes robust visa demand to the Indian tendency to plan well in advance for higher education, pursue graduate-level degrees in technical fields, the United States still being seen as the gold standard in higher education, and inherent qualities of the Indian education system.

Indian students studying in the United States over the past three years have contributed over USD 3.6 billion to the U.S. economy and supported approximately 50,000 jobs. A report by NAFSA: Association of International Educators and Indiana University calculates that the average international student in the U.S. contributes over USD 29,000 to the U.S. economy each year and that every 2.5 foreign students support approximately one U.S. job.

Trade Events

- Linden International Recruitment Fairs, lindentours.com/fairs
- FICCI Higher Education Summit, ficc-hes.com
- ISN Education Fairs, isnexpo.com

Resources

- Ministry of Human Resource Development (MHRD), mhrd.gov.in
- University Grants Commission (UGC), www.ugc.ac.in
- National Assessment and Accreditation Council (NAAC), naac.gov.in
- India Gandhi National Open University (IGNOU), ignou.ac.in
- Medical Council of India, mciindia.org
- Association of Indian Universities (AIU), aiuweb.org
- All India Council of Technical Education (AICTE), www.aicte-india.org
- United States–India Educational Foundation, usief.org.in
- National Institute of Open Schooling (NIOS), nos.org
- National Council of Educational Research and Training (NCERT), ncert.nic.in

Indonesia

Overview

With a population of 246 million, Indonesia offers a huge potential market for U.S. providers of secondary, tertiary, and vocational education. The number of university students is about 5 million, and it is predicted that the number of Indonesians in higher education will grow to 7.8 million students by 2020, making it the fifth largest system in the world after China, India, the United States and Brazil. The new government (October 2014) has given early indication that education, skill development and improvements in education and technical training is a priority. This bodes well for continued growth in opportunities for U.S. community colleges, universities and other technical training programs.

Currently, there are 36,000 Indonesian studies abroad and it is predicted to grow 20 percent annually. In the 2013–14 academic year, 7,920 Indonesian students studied in the United States (up 3.3 percent from the previous year). Indonesia is the nineteenth-leading place of origin for students coming to the United States and ranked number two in Southeast Asia after Vietnam. Over 98 percent of Indonesian applicants to U.S. colleges and universities receive their student visas.

95 percent of Indonesian studying abroad is self-funded. This group of students finances their education privately with financial support from their parents or assistance from overseas relatives. The remaining five percent of students are financed by local universities, companies, government, and scholarships through different grants. The main contributors of the grants are World Bank and The Asian Development Bank (ADB). Other educational grants available in Indonesia are Fulbright and East-West Center Fellowship.

High School

There are two types of high school in Indonesia: SMA (Sekolah Menengah Atas) and SMK (Sekolah Menengah Kejuruan). The SMA students are prepared to continue their study to university while SMK students are prepared to be ready

Statistics

Capital: Jakarta
Population: 253,609,643 (est. 2014)
GDP (USD): 1.285 trillion (est. 2013)
Currency: Indonesian Rupiah (IDR)
Language: Indonesian

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to work after finishing their school without going to university/college. SMA is a preparatory school to university while SMK is vocational school.

There is also International School in Indonesia. International School adopts an international curriculum such as International Baccalaureate or Cambridge International Examinations.

Competition from Other Countries

In Indonesia, the most preferred overseas destination for higher education has been the United States. For the past 10 years, U.S. institutions, however, have been losing significant market share to rivals from other countries, especially Australia. The main factors were the perceived difficulty of the visa application process and low visa approval rates and the high cost of tuitions/fees at U.S. institutions.

Australia, Singapore, Malaysia, United Kingdom, and Canada have aggressively promoted their programs in Indonesia. According to the Ministry of National Education of the Republic of Indonesia, Australia, Malaysia, the U.S., Japan and Germany are the most coveted destinations for overseas study. From the 2008–11 data, Australia is the most popular destination for overseas study (62,881 students), followed by Malaysia (38,378 students) and the U.S. (29,086 students). The recent survey conducted by Kompas Newspaper shows that most of the students perceive the U.S. institutions has the highest quality of education, followed by Australia, Germany and Japan.

Educational Consultants

Indonesia has a long history of sending students to study abroad and the U.S. has always been the most desired destination. However, the agent community, which claims to touch 55 percent of the market, has focused on other countries. U.S. institutions have been losing market share to other nations, especially Australia. Indonesia is a market where most students planning to study overseas consult with education agents. The Australian, Singaporean, Malaysian, United Kingdom, and Canadian governments have aggressively promoted their programs in Indonesia using agents. They have been very active in education fairs and fully utilized local education consultants as their marketing representatives to recruit students.

Indonesian International Education Consultants Association (IKPII), established in 2004, is the only education consultant association in Indonesia. The association was established to accommodate the need for a formal international education consultants association in Indonesia that can promote higher professionalism and the growth of the international education consultancy in the country.

Working together with these education consultants, the U.S. government's goal is to assist U.S. institutions to gain easy and effective access to Indonesian potential students and to raise the profile and popularity of U.S. institutions in Indonesia.

Market Entry

A recent survey conducted by a leading Indonesian newspaper shows that most students perceive academic institutions in the United States as offering the highest quality of education compared to academic institutions in other countries. The U.S. has consistently been a desired destination for Indonesian students seeking to study overseas. U.S. universities and community colleges can become more visible in the Indonesian market through participation in education fairs and/or by working with student recruitment agencies. Recruitment agencies are popular with prospective Indonesian students and their parents as they serve as “one-stop-shops” for applying to schools and provide services such as assisting with visa applications and arranging travel and accommodations.

To compete with other countries which offer lower tuition fees, universities are participating in “1+1” or “1+3” or “2+2” programs which enable students to apply credits from the years of study at a local university towards an undergraduate degree at a U.S. university.

Studying at U.S. community colleges has also become an increasingly popular option for Indonesian students. Some 40 percent 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.

There are several strategies for increasing your presence of Indonesian students:

- Work with CS Jakarta. We have a series of excellent programs designed to assist U.S. institutions to increase the number of Indonesian students attending their schools.
- Participate more at local education fairs to directly meet and recruit potential students.
- Work with education consultants. Most Indonesian students use education agents/consultants who play a significant role in sending students overseas. Please take extra precautions and work only with reputable consultants, who are involved only with legitimate students.
- Develop Indonesian-language websites. Most Indonesian parents (generally the decision makers) do not have good command of the English language.

Current Demand

The majority of students from Indonesia study at the undergraduate level (65 percent), followed by the graduate level (21 percent). Fields of interest in field studies include: business, technology and science, social science and computer science.

Resources

- Institute of International Education, iie.org

Israel

Overview

At the start of the 2013–14 academic year, the Council for Higher Education estimated that 308,335 students would attend the 66 institutions of higher education in Israel, including 236,770 undergraduate (76.8 percent), 59,700 graduate (19.4 percent), 10,650 Ph.D. (3.5 percent), and 1,215 diploma students (0.3 percent). This is an increase of 1.7 percent over the previous academic year. The growth rate has slowed down to less than 4 percent annually in the last decade, compared to 8 percent a year in the 1990s, when higher education became more accessible to the general public. The Council for Higher Education (CHE) accredits all new institutions and programs and authorizes them to award academic degrees. The growing number of students entering private colleges has changed the landscape of the Israeli higher education system. The growth in the student population has led to the establishment of new colleges to meet the demand of qualified students. These colleges are accredited and must offer the same standard of education provided by state universities. Undergraduate students are entering these institutions in ever-increasing numbers (50 percent), thereby allowing the seven public universities to focus more on graduate and research level studies. Today, institutions of higher education in Israel include seven state universities, one open university, 37 academic colleges (eight regional colleges associated with universities, 29 other regional colleges) and 21 teacher training colleges. Also, there are 12 institutions that offer diploma-level programs that are recognized by the Ministry of Education, 11 art schools, and 59 technological colleges. In 2013, revenues of the top 20 local universities and community colleges exceeded USD 2 billion. Around thirty foreign universities run local campuses in Israel.

Market Entry

Today, attention in Israel has turned to secondary study and relevant accreditation, be it degree, diploma or certificate. Israelis are looking to broaden their horizons

Statistics

Capital: Jerusalem
Population: 7,821,850 (est. 2014)
GDP (USD): 273.2 billion (est. 2013)
Currency: Israeli new shekel (ILS)
Language: Hebrew (official), Arabic

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both professionally and personally and are investigating opportunities to study abroad. According to the OECD, Israel is the second most educated country in the world, which suggests that it is home to prospective international students of the highest quality. Also, Israel has the second highest number of GMAT takers per capita of any country in the world, and provides the seventh largest number of takers of any country in the world, ahead of France and Germany. Best prospects for U.S. educational institutions are to offer a degree integrated with practical work experience. According to 2013 statistics, a total of 25,000 Israelis requested information and showed interest in study programs in the States. In 2012–13 there were 2,430 Israeli students (700 undergraduate, 1,291 graduate, 148 non-degree, and 291 OPT) studying in the United States, a 2.4 percent decrease from the previous year.

Current Demand

Courses of Study

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

Exchange Programs and Cooperative Agreements

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

Energy Sector Workforce Requirements for Israel

Israel's offshore natural gas reserves are estimated around 30 trillion cubic ft., however the nation has little formal or vocational education programs to rapidly and efficiently develop this resource. This creates an opportunity for educators to train these individuals. Universities offering degree programs focused on hydrocarbon development at both the undergraduate and graduate level, can capitalize on this opportunity.

Japan

Overview

During the 2013–14 academic year, Japan had the seventh highest population of students studying in the U.S. in the world. Japanese students studying in institutions of higher learning in the U.S. accounted for 19,334 students, and contributed more than USD 595 million to the U.S. economy through their expenditures on tuition and living expenses. While the number of college age individuals in Japan has steadily decreased since 1992 due to the declining birth rate, the United States has been, and still is, the most popular overseas destination for Japanese students seeking degree programs.

Market Entry

The internationalization of Japanese education is one of the major priorities for the Japanese Government. The Japanese Government is promoting measures to facilitate study abroad participation from the viewpoint of international human resource development, vitalization of personnel interchanges with foreign universities, and globalization of the traditional insular Japanese society. There are potential opportunities for U.S. institutions especially for summer programs, semester programs, and intensive language programs. All such programs are increasing in popularity among Japanese students.

During the prolonged economic downturn, Japanese companies cut outside training/education costs. With the vacuum that has resulted, there are good market opportunities for U.S. programs which have unique offerings, a strong track record, and have been localized for the Japanese market. Some Japanese firms (especially larger corporations) may be hesitant to purchase products and services directly from overseas suppliers. U.S. companies may need to partner with local companies, such as consulting companies and placement firms, which often service the training and/or workforce needs of Japanese companies.

Statistics

Capital: Tokyo
Population: 127,103,388 (est. 2014)
GDP (USD): 4.729 trillion (est. 2013)
Currency: Yen (JPY/¥)
Language: Japanese

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Current Demand

Many students have become serious about improving their English proficiency in order to secure good jobs upon graduation in a competitive job market. More companies are now mandating their official language as being English with some companies even taking extreme measures such as demotion based on employee English scores. This has led to an increased interest in practical English with an emphasis on business communication. While the desire to learn English is high, one would be surprised at the average English proficiency of a new Japanese applicant. Universities with relaxed English proficiency requirements would be more attractive to Japanese students as an entrance point.

- Test of English as a Foreign Language (TOEFL) scores of Japanese students are low by global standards, and are even lower with iBT testing. Hence, U.S. colleges with relaxed TOEFL score requirements for admission attract more attention.
- One-semester and one-year abroad programs are becoming more attractive to Japanese college students.
- Summer short term ESL courses with other programs or activities attached tend to be preferred by Japanese schools.

Trade Events

- The Association of Boarding Schools Fair (Tokyo), boardingschools.com/tokyo
- America EXPO Japan, americaexpo.jp/for-us-institutions

Resources

- Japan Student Services Organization (JASSO), www.jasso.go.jp/index_e.html
- Ministry of Education, Culture, Sports, Science, and Technology, www.mext.go.jp/english

Kazakhstan

Overview

Kazakhstan's population reached 17 million in 2013. Ninety percent of the population completes secondary education or beyond and there is great importance placed on education both by the Government and the citizenry. Since Kazakhstan's independence in 1991, Kazakh nationals have taken increasing advantage of studying overseas with around 36,394 students currently studying outside of Kazakhstan.

Currently, 571,691 students are enrolled into higher education institutions in Kazakhstan. There are 139 universities nationwide. The range of tuition fees in Kazakhstan is from USD 1,000–15,000 per year, primarily at American-style, English-language universities. About 80 percent of the students are self-funded and just 20 percent are on state scholarships.

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

143,000 students graduated from high-school in 2013, and the number will rise to around 200-250,000 students forecast to graduate annually by 2020. So, just as the Government of Kazakhstan reduces the number of universities, an unprecedented number of students will enter the market, creating opportunity for U.S. institutions with ties to Kazakhstan.

Since 2011, the Bolashak (“Future”) scholarship program has provided scholarships for Master's and Ph.D. programs. The most popular countries for study under the program are the UK, U.S., and Russia. Of the 200 educational institutions with Bolashak agreements, 49 are in the U.S. Academic Mobility Scholarship—another program, introduced in 2011 to support 300 students in state or national universities to complete part of their graduate degrees abroad.

Statistics

Capital: Astana
Population: 17,948,816 (est. 2014)
GDP (USD): 243.6 billion (est. 2013)
Currency: Kazakhstani tenge (KZT)
Language: Kazakh (Qazaq, official)

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At the moment, fewer than 10 percent of potential Kazakhstani applicants are studying in the United States. Out of 43,000 students studying overseas, 70 percent are self-funded. In 2013–14, over 2,000 students from Kazakhstan went to study in the U.S. with 65 percent studying at Bachelor's level.

Market Entry

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

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

Current Demand

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 USD 13,000 and a large disposable income of its population make Kazakhstan an attractive market for the U.S. education sector. During the period of time from 2009 until 2014 the number of students going to the U.S. increased from 1,714 to over 2,000. Unlike the rest of Central Asia, Kazakhstan's per-capita GDP has risen in the last five years, creating a burgeoning pool of middle- and upper-class youth eager to travel and study abroad. In addition, government policy has facilitated this by dramatically increasing English-language education nationwide over the past decade. Higher education is not fine-tuned in order to reflect more accurately the needs of the labor market. Major multinationals regularly noted a "skills gap," with an insufficient supply of up-to-date technicians, engineers, scientists and professional managers, which might mean an increasing demand in education for related degrees.

Trade Events

- Education and Career 2014, eng.atakentexpo.kz

Resources

- Kazakhstan Ministry of Education and Science, edu.gov.kz/en
- Bolashak Scholarship Program, bolashak.gov.kz

Korea, Republic of

Overview

Economic development in South Korea has increased the general amount of disposable income. South Korea also has one of the lowest birth-rates in the world. Regardless of the smaller market size, students from South Korea make up the third highest population of international students studying in the U.S. with an estimated population of 91,693 students. Overseas education has become a standard in South Korea and parents are willing to spend a large portion of their income on education, expecting high future returns.

English skills are also expected by most companies in South Korea. Employers require applicants to take the TOEFL or the TOEIC test to measure applicant's English abilities. Korean students are exploring the opportunities of improving their English language skills not only in the local language institutions but also actively utilize the exchange programs or short-term summer or winter language training programs in the U.S.

Market Entry

Korea's dynamic and constantly evolving education market is best characterized by the power of the information that flows by word-of-mouth referrals. Korean parents are increasingly capable of acquiring information on educational opportunities for their children. Agents are utilized less. U.S. schools should consider employing a combination of on-line advertising, blogging, Facebook, and twitter within their promotional campaigns. Building people to people networks through alumni advocacy as well as developing and broadening exchange programs, which in turn, raise the profile of the U.S. institution, definitely helps U.S. schools attract Korean students to the U.S.

Statistics

Capital: Seoul
Population: 49,039,986 (est. 2014)
GDP (USD): 1.666 trillion (est. 2013)
Currency: S. Korean won (KRW)
Language: Korean, English

Contact

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Current Demand

- Long-term undergraduate and graduate programs are considered the best value.
- One or two semester exchange programs that incorporate other value-added components such as internships have gained popularity.
- Recently more Korean students are employing strategies to study at a community college before transferring to a 4-year college.
- Private primary and secondary education—despite the decline of Korea's youth population, Korea continues to be a reliable source of international students.

Resources

- Ministry of Education (MOE), english.moe.go.kr
- Korea Education Development Institute (KEDI), eng.kedi.re.kr
- Fulbright (Korean-American Educational Commission), fulbright.or.kr/xe/index
- Korea Overseas Studying Association (KOSA), kosaworld.org

Kuwait

Summary

An oil-rich market, Kuwait spends heavily to improve its education systems to prepare its increasing number of youth entering the competitive job market in the private-sector. On the infrastructure side, Kuwait has spent USD 1.14 billion to upgrade educational facilities in Kuwait which includes USD 882 million to rebuild old schools and create new facilities. On the education services side, the Ministry of Higher Education announced in 2014 an additional 1500 overseas scholarships for Kuwaiti students in the coming academic year, bringing the total number to 6000 scholarships each year. The uptick in scholarships is meant to address the volume of high school graduates seeking higher education abroad. This scholarship program covers up to 100 educational disciplines including 89 scientific disciplines, literary as well as interdisciplinary ones. There is a move afoot to emphasize certain disciplines, specifically dentistry, nursing and pharmacy due to urgent demand. U.S. universities targeting Kuwaiti student have to approach the Cultural Office at Kuwait Embassy in Washington, DC to be part of its pre-approved list of universities. Universities must meet the specific criteria of the Cultural Office of the Kuwait Embassy in order to be included on the pre-approved list of universities for Kuwaitis.

In 2012, the Human Development Index report ranked Kuwait fifth in the GCC and 54th in the world. With literacy rate above 93 percent, Kuwait ranks among the highest in the Arab world. This is partly attributed to Kuwait's progressive education policy that encompasses all children, including those with special needs and females alike.

In total there are approximately 1250 public schools and private educational institutions. 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

Statistics

Capital: Kuwait City
Population: 2,742,711 (est. 2014)
GDP (USD): 165.8 billion (est. 2013)
Currency: Kuwaiti dinar (KWD)
Language: Arabic (official), English

Contact

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national development plan. On the information communication technology (ICT) side, the Ministry strives to incorporate the latest technology to empower schools to raise the level of ICT literacy. For example, in 2011, the MOE signed a Memorandum of Understanding (MOU) with Hewlett-Packard (HP), underscoring the government's long-term commitment to enhancing the role of technology in education. The MOE would work with HP to advance teaching skills through professional development opportunities; this will strengthen the integration of technology in K-12 schools. Out of the 20 international schools, four are affiliated American schools and the rest follow Canadian, British, French, or Indian curricula with English speaking programs.

There are nine universities in Kuwait in total. Kuwait University, the only public university, graduates 4000 students from a variety of programs each academic year. The other universities are private: namely, American University of Kuwait, Box Hill College, and Gulf University of Science and Technology to name a few.

On the vocational and non-degree training side, there is high demand. 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) deliver 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 of Kuwait has created a USD 5.6 billion education market that is strong, steady, and offers many opportunities for U.S. universities and suppliers of products and services. The U.S. leads the pack with roughly 20 percent market share, followed by Japan, the U.K and other Far East countries. U.S. products are highly respected by the Ministry of Education, but companies seeking business here have to be competitive, flexible, and well-connected to compete for government projects.

Market Entry

The U.S. Embassy in Kuwait places significant emphasis on the promotion of American education and training institutions. The Embassy regularly promotes various education shows, including the American Education Expo, EduCare Expo, America-Mideast Educational and Training Services, Inc. (AMIDEAST), and Linden Tour. The Embassy also provides advice and counseling to students on applying to regionally-accredited U.S. education institutions.

Current Demand

The best prospects and services in the Kuwait education sector are ESL and TOEFL programs, and Certified Programs such as Executive Trainings, Management Trainings, IT Trainings, Security Training and Ongoing Professional Development.

Undergraduate, pharmacology, engineering, dentistry, and management degrees are also a primary focus for Kuwaiti students looking to study abroad.

Malaysia

Overview

Malaysia is ranked 24th in the total number of students sent to the U.S. for higher education. According to Open Doors 2014 “Fast Facts” for 2013–14, there were 6822 Malaysia students studying in the United States, a 0.5 percent change.

Primary source of funds for Malaysian students are personal and family. Malaysian students are generally known to be good and serious students. As a result, they typically are able to gain U.S. academic scholarships, either upon entry or soon after. Secondary source of funds for Malaysian students are Malaysian government and private corporation scholarships. There are access criteria to the secondary source of funding. Successful Malaysian government scholarship applicants must be accepted into TIMEs Higher Education (THE) World University Ranking Top 100 schools in order to have access to these funds. T.H.E. is part of the Thomson Reuters group.

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

Market Entry

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

Statistics

Capital: Kuala Lumpur
Population: 30,073,353 (est. 2014)
GDP (USD): 525 billion (est. 2013)
Currency: Malaysian ringgit (MYR)
Language: Bahasa Malaysia (official)

Contact

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Current Demand

Traditionally, the three main fields of studies for Malaysian students to the U.S. are Business, Engineering and Computer Science. In recent years, there is marked interest in a specific field of study from Malaysian students: actuarial science. Due to the Malaysian government regulatory policy, certain fields of study are not as popular: Medicine and Dentistry (except for post graduate specialization), Law, Accounting, and Architecture. Liberal Arts traditionally is not a main draw as Malaysian students and parents place heavy emphasis on marketability and ability to earn a living immediately after graduation as part of their field of study selection criteria. Other considerations for students are cost, geography, religious and dietary similarities, and education and British Commonwealth legacy.

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

Resources

- Malaysian-American Commission on Educational Exchange, macee.org.my

Mexico

Overview

Mexico is the ninth largest country of origin for students studying in the United States, with over 14,000 Mexican students enrolled, primarily in undergraduate programs. Approximately two percent of foreign students under student visa status in the U.S. are from Mexico. Mexican students choose to study in the U.S. because of the strong ties and proximity between the countries and the prestige of the American higher education system.

Thanks to the Bilateral Forum on Higher Education, Innovation and Research announced by Presidents Obama and Peña-Nieto in May 2013, schools in Mexico are more open than ever to internationalizing their programs. Most universities, both public and private, are developing international collaborations with foreign universities. The Mexican government has set the goal to send 100,000 Mexican students to the United States and welcome 50,000 U.S. students to Mexico by 2018. As a result, student exchanges will increase in the coming years, as more information becomes available, competitive education is growing, and study and work experiences gained in foreign countries come to be expected in the business community.

There is also a demand for English language proficiency within higher education in Mexico. Several Mexican private universities use the Test of English as a Foreign Language (TOEFL) institutional exam as a requirement for students in all fields of study to increase the knowledge of a second language in this competitive market. It is estimated that about five percent of Mexican English as a Second Language (ESL) students travel abroad for intensive English programs.

Market Entry

Mexican public and private colleges are focusing on alliances and agreements with foreign schools to provide joint programs, dual certification, and exchange

Statistics

Capital: Mexico, D.F.
Population: 120,286,655 (est. 2014)
GDP (USD): 1.845 trillion (est. 2013)
Currency: Mexican peso (MXN)
Language: Spanish

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programs for students and professors. These programs have become more important as Mexico has become a key player in the world economy.

U.S. government agencies are working with institutions in the U.S. and Mexico to encourage greater exchanges and closer partnerships between U.S. and Mexican education institutions, including community colleges and technical institutions.

It is highly recommended to travel and participate in recruitment fairs, as well as to visit schools to promote educational opportunities.-=

Current Demand

- Short-term ESL programs for students
- Undergraduate and graduate programs for engineering, business, environment/energy and science
- Corporate training programs in management, as well as executive-level language proficiency programs
- Dual-degree programs and collaborative programs in international business and management, engineering, environmental technology

Resources

- 100,000 Strong in the Americas, 1.usa.gov/13ctH6G

Nigeria

Overview

Industry reports indicate that Nigeria has more than 300 higher-education institutions ranging from universities, specialized colleges of technology and polytechnics, to colleges of education. The rapid population growth and demand for education have placed a heavy burden on the government in providing quality education, which opens up opportunity for private and institutional investors. During the past 20 years, more than 45 private universities have been accredited by the National Universities Commission (NUC) to meet higher education needs of Nigerians and the economy; this excludes 36 federal and 37 state universities already approved and operational. By contrast, the 2012 U.S. Embassy Education Survey shows that between 2006–10, more than 1.5 million students sought admission into Nigerian universities each year; however, less than 300,000 applicants were admitted into these institutions—both government and private—due to limited capacities. Due to dwindling quality and inadequate facilities, many parents resort to sending their children abroad for quality education.

A 2012 Nigeria market survey conducted by the U.S. Embassy's Education Advising Center (EAC) indicates that Nigeria is the largest source of students from sub-Saharan Africa to the United States, with a 6 percent increase in the number of students admitted to study in undergraduate, graduate and non-degree programs in the U.S. over the previous year. Although the monetary value of U.S. education service exports is difficult to calculate, we estimate that more than 8,000 Nigerian students are studying in over 700 U.S. universities, with tuition fees totaling in the millions of dollars annually. Given the impact of frequent national strikes by university teachers and distortion in school calendar, EAC believes that the number of Nigerian students seeking to study in the U.S. will likely increase in the coming years.

The U.S. has maintained the leading position in the undergraduate market due to its longstanding ties to Nigeria, but Canada, the U.K., Australia and South Africa

Statistics

Capital: Abuja
Population: 177,155,754 (est. 2014)
GDP (USD): 478.5 billion (est. 2013)
Currency: Naira (NGN)
Language: English (official),
Igbo, Yoruba, Hausa

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are increasingly aggressive competitors in the market. Beyond having a strong presence in Nigerian market through recruitment agents, many UK and Canadian institutions have set up local offices, actively participating in local education events, and gaining wider access to the prospective student population through the media and customized education fairs.

The federal government has proposed a number of reforms in the education sector to address the declining quality of instruction, shortage of textbooks and inadequate facilities. According to the Federal Ministry of Finance, the GON has estimated nearly USD 85 million is needed to implement education sector development plans for fiscal year 2013, including the procurement of computers, library books, and equipment for schools. This would provide significant potential for U.S. export of educational items. The federal government is also considering privatizing the Nigerian College of Aviation Technology in Zaria. Market reports indicate that this would create opportunity for private investment. Some state governments are also creating stimulating and supportive environments for educational investments in their locality. For example, Kwara state is currently inviting proposals from reputable foreign investors to establish a vocational center for skills development of graduates from both the federal and state-owned universities in the state, and is willing to provide land, infrastructure, tax holidays and financial support, including investment insurance to qualified investors.

Recent observations indicate that the UK is dominating a substantial part of the training sector, particularly in providing project management training to Nigerians. Although the UK, Lebanese, and recently Canada are taking advantage of these opportunities, Nigerians have an affinity for U.S. education, training services and products.

Market Entry

Given the rapid growth in private investment in education, laboratory equipment, books, and professional textbooks would continue to gain market position. In addition, industry reviews clearly show that U.S. education-based organizations should consider developing custom-made courses for evolving Nigerian industry sectors, particularly the security, aviation, environment, oil and gas, as well as financial services sectors.

Current Demand

- Education franchises
- Professional training
- Continuing education for Nigerian professionals

Romania

Overview

In Romania there are 93 higher education institutions, out of which 37 are accredited private institutions of higher education and 56 are state institutions. State (public) universities offer budgeted places and also accept fee-paying students. According to observations made in the 2014 EducationUSA's Fast Facts for Romania, Romanian high school students are recognized for their academic excellence and are frequent winners of top international competitions in physics, chemistry, mathematics and computer science.

The U.S. is the eighth study abroad destination for Romanian students, following the UK, Italy, France, Germany, Spain, Hungary and Denmark, according to a UNESCO 2012 report. However, mobility to the U.S. has been dropping at a constant rate (-9.8 percent since last year). The proportion of the population aged 15–24 in Romania has declined by 22 percent over the past 10 years (according to Eurostat, 2013), which may account in part for the decline in student mobility to the US. Other factors include limited fee-paying abilities and the availability of study options in Europe (since Romania's accession to the EU). The number of U.S. students in Romania has increased by 40.7 percent, i.e. there were 287 American students in Romania in 2013.

Market Entry

Romania joined the European Union in 2007, which led to a sharp decrease in tuition costs for Romanian students interested in study opportunities in any of the E.U. member states. Concurrently, over the past seven years, there has been a clear resurgence of interest in academic mobility, with more Romanian students than ever planning to pursue an academic degree abroad. Although high tuition fees are still a burden for many Romanians, they are more inclined than ever to consider alternatives to the national system of education at all levels.

Statistics

Capital: Bucharest
Population: 21,729,871 (est. 2014)
GDP (USD): 288.5 billion (est. 2013)
Currency: Romanian leu (RON)
Language: Romanian

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Current Demand

High numbers of enrollment are reported for business administration programs, along with high numbers of enrollment in law schools, institutions geared towards health professions, and even humanities. The most sought after specialization at the University of Bucharest in 2013 was “applied modern languages.” According to a recent survey poll, organized by a private corporation in cooperation with the Ministry of Education, high school students would prefer to major in law (15 percent), computer science (13 percent) and even acting (around 11.4 percent).

Resources

- National Ministry of Education, edu.ro
- Romanian-U.S. Fulbright Commission, fulbright.ro

Saudi Arabia

Overview

Saudi Arabia's educational system is experiencing an impressive transformation. Not only has the Saudi Government been increasing budgetary appropriations in support of education and manpower development projects since 2000, but it also has been increasingly opening its doors to U.S. universities, institutions, and major corporations. The Government has appropriated 25 percent of its fiscal year 2014 budget, around USD 56 billion, for expenditure on the education sector, an increase of 3 percent over fiscal year 2013.

The budget includes new projects for 465 new school buildings, 1544 school buildings currently under construction, and also includes appropriations to increase the number of classrooms and rehabilitation of around 1500 existing school buildings.

The fiscal year 2014 budget includes appropriations for revamping several women's universities, opening of eight new colleges and completing the construction of campuses for new universities.

USD 5.9 billion was appropriated to the King Abdullah Scholarship Program, which supports over 185,000 Saudi students studying abroad, including their dependents who are also supported by the program. The budget also includes several new projects to build new vocational and technical colleges and institutes, costing around USD 1.39 billion, and additional appropriations for existing projects amounted to USD 133.3 million.

The Saudi Government continues to focus on investment programs that enhance long-term and sustainable economic development and employment opportunities for Saudi nationals. The Government realizes that to achieve a highly diversified new economy with significant Saudi labor, education and training must be a significant cornerstone in the Kingdom's diversification plans.

Statistics

Capital: Riyadh
Population: 27,345,986 (est. 2014)
GDP (USD): 927.8 billion (est. 2013)
Currency: Saudi riyal (SAR)
Language: Arabic (official)

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Market Entry

King Abdullah University of Science and Technology (KAUST)

KAUST's core campus, located on the Red Sea at Thuwal, occupies more than 36km² (14 sq. mi.), encompassing a marine sanctuary and research facility. KAUST is the first mixed-sex university campus in Saudi Arabia. Women are allowed to mix freely with men and drive on campus, and are not required to wear veils in the coeducational classes. KAUST pursues its research agenda through four strategic research points that focus on areas of science and technology that are important to the Kingdom, the region and the world:

- Resources, energy, and the environment
- Biosciences and bioengineering
- Materials science and engineering
- Applied mathematics and computer science

Riyadh Women's University

Riyadh Women's University will have 13 colleges, including facilities for medicine, dentistry, nursing, naturopathy and pharmacology and a 700-bed hospital. The new university and campus, which will accommodate up to 40,000 students, aims to be the focal point for prompting education among women in the Kingdom. The university also plans to focus on educational programs that are essential to meet the various demands in the Saudi market.

King Fahd University of Petroleum and Minerals (KFUPM)

KFUPM is located in Dhahran in the Eastern Province of Saudi Arabia. It is a leading educational organization for science and technology. More than 10,000 students attend the University to pursue both undergraduate and graduate programs, including sciences, engineering, computer sciences, industrial management, and environmental design.

Prince Mohammad University (PMU)

The Prince Mohammad University is a new private university located in the Al-Khobar area of the Eastern Province of Saudi Arabia. The University has been established by a group of renowned individuals under the auspices of HRH Prince Mohammad bin Fahd bin Abdulaziz. One of PMU's goals is to equip Saudi nationals with the appropriate competencies and technical knowledge to meet the growing demand for manpower in the Saudi market. Students at PMU study in diverse fields, including business, engineering, information technology, culture, education, community development and public administration.

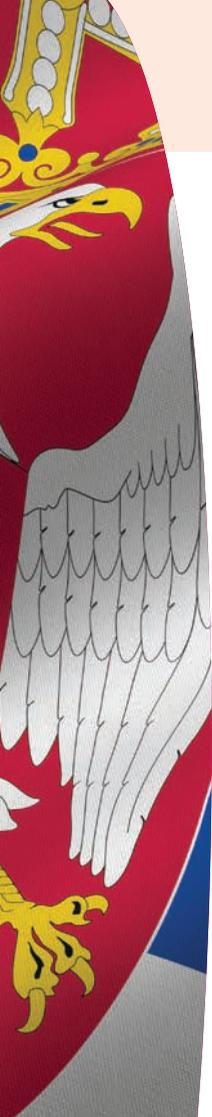
Current Demand

The Kingdom has identified technical and administrative training as an essential sector of education to support the country's economic and social development. Graduates of training programs in healthcare, agriculture, teaching and other areas are steadily filling positions at industrial, agricultural and social institutions throughout the country. The General

Organization for Technical Education and Vocational Training, along with the Ministry of Education, Ministry of Labor and Social Affairs, operates most of the Kingdom's vocational training centers and higher institutes of technical education. Several other government agencies run institutes or training centers in their particular specialties.

English language programs for professional development constitute an excellent business opportunity in the Saudi market. Other areas of interest include hands-on training such as machine tooling, metalworking, electro-mechanics and auto mechanics. These programs offer young Saudis the opportunity to learn skills that are in high demand, and courses are specifically tailored to meet the needs of unemployed Saudis.

Another important institution designed to address the country's shortage of administrative personnel is the Institute for Public Administration, established in Riyadh in 1961 as a semi-independent public agency. The institute provides basic training for civil servants and has branches in Dammam and Jeddah, as well as a special branch in Riyadh for training women. It offers courses in administration, law, accounting, computer science, maintenance, personnel management, secretarial skills and management planning.



Serbia

Overview

Education in Serbia is consists of: preschool, primary school, secondary school and higher education levels. It is regulated by the Ministry of Education, Science and Technological Development of Republic of Serbia.

One of the key goals of Serbia's higher education is the implementation of the Bologna Process and comprehensive educational reform that started in 2005. However, the implementation of the Bologna Process spawned a lot of problems, such as the introduction of very high tuition fees in public universities under the cover of the process. The average tuition fee for one year of studies is between EUR 1,000–1,500 for public, and EUR 2,000–2,500 for private universities.

In 2012 government of Serbia accepted The Strategy for Development of Education in Serbia 2020 with the main goal to advance the quality of education and increase the number of students participating in the education programs. Also, this strategy supports international openness and mobility of students. The strategy predicts that by the year 2020, 20 percent of students will participate in international exchange programs.

It is certain that there is a certain trend among students to study abroad (mostly in EU countries). This is usually an independent decision, made by students, and not related to cooperation with universities in Serbia. However, there are programs for students to study abroad that offer full or partial scholarship. In 2013 there were 753 F-1 U.S. visas (full time students) issued in Serbia.

Statistics

Capital: Belgrade
Population: 7,209,764 (est. 2014)
GDP (USD): 80.47 billion (est. 2013)
Currency: Serbian dinar (RSD)
Language: Serbian

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Market Entry

International Exchange Programs Between the U.S and Serbia

- American Serbia and Montenegro Youth Leadership Exchange (A-SMYLE)
- The Global Undergraduate Exchange Program (Global UGRAD)
- Fulbright U.S. Student Program
- Fulbright Visiting Scholar Program

Due to the current condition of Serbia's economy, fully-funded scholarships are the best way to attract Serbian students.

Intensive English Language Programs

Although Serbian students are taught English as a second language from the early grades of elementary school, English proficiency level is generally not achieved. English language teaching can be considered a good niche for the U.S. concepts.

E-learning

The ability to earn college credit through internet courses has been booming in the United States in recent years. The flexibility of taking courses via an online college site is an area which could be profitable for American universities looking to attract Serbian students eager to strengthen their resumes and diversify their studies.

Current Demand

One of the most appreciated faculties in Serbia is Faculty of Electronic Engineering in Belgrade. In last couple of years, the vast numbers of secondary students applied for the Faculty of Organizational Sciences in Belgrade. However, "traditional" sciences are still highly respected (law, medicine, economy, social sciences).

In academic year 2010–11 top five faculties by the number of enrolled students at the University of Belgrade were Faculty of Law (8581 students), Faculty of Economy (8038 students), Faculty of Philology (6919 students), Faculty of Organizational Science (4849 students) and Faculty of Philosophy (4103 students). Among students enrolled at the university, for the year 2010, 48 percent paid for their studies and 52 percent were financed by the government.

Resources

- Ministry of Education, Science, and Technological Development, mpn.gov.rs
- EDUfair(TM) Belgrade, edu-fair.net
- International Academic Center, iacbg.org

Spain

Overview

According to the Institute of International Education's 2013 Open Doors report, Spain is ranked 25th among countries sending students to the U.S. for higher education and training services. During the 2012–13 academic year, 5,033 Spanish students were enrolled in undergraduate, graduate, OPT, or Intensive English Programs. This was a 2.2 percent increase over the previous academic year. The fact that Spain's new King studied in the U.S. and has been supportive of educational exchanges with the U.S. has brought positive visibility to the U.S. education market. Spain's royal family conferred the prestigious 2014 Prince of Asturias Award for International Cooperation on the Fulbright Program.

Spanish students are actively seeking study abroad opportunities, and many take full advantage of the European Union's Erasmus program for exchanges within Europe. Spanish students also highly value educational opportunities in English speaking countries outside the EU including the U.S., Australia and Canada.

Spain sends around 1,000 high school grade students every year to the U.S. These opportunities are very popular with Spanish families seeking opportunities for their children to immerse themselves in an English speaking academic environment. There has also been increased demand for summer camps and ESL programs in the U.S.

Market Entry

Spain is a stable and mature market for inbound students. An on-site partner network and/or accredited representatives are recommended to drive and support student acquisition.

Statistics

Capital: Madrid
Population: 47,737,941 (est. 2014)
GDP (USD): 1.389 trillion (est. 2013)
Currency: Euro (EUR/€)
Language: Castilian Spanish (official)

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E-learning, blended programs, and intensive ESL programs offer additional opportunities, as well as optional practical training programs. Spanish students are very sensitive to costs when selecting education options and value dual accreditation courses.

Current Demand

Spanish student enrollment in graduate programs has had consistent growth in the past couple of years and should continue to be offer opportunities in the U.S. education market. One third of Spanish students studying in the U.S. are enrolled in graduate programs.

The most popular academic fields of study for Spanish students in higher education in the U.S. are:

- Business
- Management
- Social Sciences
- Engineering
- Fine/Applied Arts

Trade Events

- AULA (Madrid), March 4–8, 2015, ifema.es/aula_06
- Foro de Posgrado (Madrid), March 5–8, 2015, ifema.es/forodepostgrado_06
- Saló de l'Ensenyament (Barcelona), March 12–16, 2015, ensenyament.com/en
- Enterate (Multiple cities), eventoenterate.com
- FPPEDUMedia EDUEXPOS (Multiple cities), fppmedia.com
- QS World MBA Tour Madrid, bit.ly/16u4vdD
- SRT Student Recruitment Tours, srt-fairs.com

Resources

- EducationUSA, educationusa.info/spain
- Fulbright Spain, fulbright.es
- Spanish Association of Promoters of Courses Abroad (ASEPROCE), aseproce.org

Taiwan

Overview

According to IIE Open Doors data, in 2013 Taiwan was the sixth leading origin of foreign students studying in the U.S., with 21,867 students enrolled in U.S. institutions. The U.S. remains the top destination for Taiwan students that pursue studies abroad—49.7 percent of the students studying at the graduate level, 27.4 percent at the undergraduate level, 15.6 percent at Optional Practical Training (OPT), and 7.3 percent in other non-degree programs. Even though the number of students from Taiwan has decreased gradually, U.S. universities continue to be highly regarded for excellence in academic programs, teaching quality, diversity and modern facilities.

In recent years, career development programs or degree programs with work opportunities are becoming increasingly popular. An interesting trend developing is more and more Taiwan students choose to stay in the U.S for an OPT program, to work for 12-29 months, upon completion of their studies. One major contributing factor is the stagnant domestic economy which resulted in lower pay and fewer international job opportunities. Many Asian neighboring countries are noticing the trend, such as China (including Hong Kong), Japan and Singapore, and they have stepped up efforts recruiting top notch Taiwan students by offering scholarships or job opportunities upon graduation. Therefore, it is advisable for U.S. schools to increasingly emphasize affordability and quality, as well as post-graduation job placement to attract Taiwan students.

Another growing market segment that is related to work placement is the “Working Holiday.” According to the Taiwan Ministry of Foreign Affairs, the number of applicants for Work Holiday programs increased fivefold in four years’ time. In 2012 a total of 19,200 people went abroad for Work Holiday programs, mainly to Australia, New Zealand, Canada and Japan. Even though the U.S. does not offer Work Holiday visas, U.S. schools can try to design ESL or professional certificate programs that will allow students to have an internship or participate in work

Statistics

Capital: Taipei
Population: 23,359,928 (est. 2014)
GDP (USD): 926.4 billion (est. 2013)
Currency: New Taiwan dollar (TWD)
Language: Mandarin Chinese (official)

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experiences. Finally, pathway programs and conditional admission programs continue to make inroads into the Taiwan market as more and more students shun taking TOEFL or IELTS tests.

Another major development in Taiwan's education industry is the easing of regulations to enable foreign universities to establish operations in Taiwan in the Free Economic Pilot Zones (FETZ). The Plan, which is yet to be finalized by the Legislative branch of the Taiwan authorities, will allow foreign universities to collaborate with Taiwan universities, to set up branch campuses, independent colleges, or joint degree programs. The move was triggered by two main factors: One being that Taiwan has been left out of a trend within the Asia Pacific region for leading foreign universities to establish branch campuses to serve international students; second is the declining number of Taiwan youth going abroad to study. U.S. institutions of higher education should take advantage of this window of opportunity to come to Taiwan and explore partnerships with Taiwan universities.

The market for Taiwanese students is very competitive. Taiwan is a stable and mature market for U.S. institutions. Domestic supply of higher education institutions has also reached its saturation point. Traditionally, the major foreign recruiters are from English-speaking countries such as the UK, Australia, Canada and New Zealand. In recent years, neighboring Asian countries are also becoming very active in recruiting Taiwan students or partnering with Taiwan schools. Going abroad to study is now more of a consumer's choice, with students becoming savvy about selecting programs which offer the best value for the time and money.

In order to maintain its leading position, U.S. schools should pursue deeper partnerships with Taiwan institutions for student/scholarly exchanges or joint degree programs. Engaging with student recruitment agencies, developing active alumni networks, and reaching out to potential students through educational fairs and social media are all recommended strategies.

Market Entry

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

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

Participation in education fairs may also be a very effective tool. Fair organizers have a deep knowledge of the market and can greatly reduce U.S. schools' marketing expenses. Local fair

organizers also counsel students throughout the year and are able to follow up with students who visit an education fair. Taiwan's major education fairs featuring U.S. schools include:

- OH! Study International Education Expo (Spring/Fall), co-sponsored by CS Taiwan
- AIEF Education Foundation Fair (AIEF)
- USEAS Study World
- The Association of Boarding Schools Fair (TABS), co-sponsored by CS Taiwan
- The MBA Tour
- QS Top MBA Fair

Current Demand

- Degree programs in business, engineering, life sciences, computer sciences, health care, education, and the arts.
- Programs containing a work or internship component
- Pathway programs
- Professional certificate or diploma programs
- Joint degree programs with local universities

Resources

- Taiwan Ministry of Education, english.moe.gov.tw
- Oh! Study Education Center, ohstudy.net/expo
- American International Education Foundation (AIEF), aief-usa.org
- USEAS Study World, useas.com.tw/study-world
- Top MBA Tour, topmba.com
- The MBA Tour, thembatour.com
- The Association of Boarding Schools Fair (TABS), tabs.org

Thailand

Overview

Thailand is still moving forward to improve its educational system in order to increase its competitiveness in human resources and prepare students to work and thrive in an international community before the implementation of the ASEAN Economic Community (AEC) next year.

The Ministry of Education has issued a number of tasks in developing Thailand into an international education hub in the ASEAN region. One of the urgent tasks is to develop students' skills in the English language and the languages of neighboring countries. Thailand still lags far behind major ASEAN countries in English proficiency, especially compared to Singapore, Malaysia, the Philippines, and Indonesia. Hence, the number of English language schools and language training centers is growing in order to meet demand for more education options.

Both state and private universities also offer international programs to attract Thai and foreign students. In 2013, there were more than 1,200 international programs available and more than 10,000 international undergraduate students in Thailand, of which 44 percent were from China, followed by Burma, Laos PDR and Vietnam.

Market Entry

Within the sector of higher education, community colleges and two-year educational programs offer strong growth potential in Thailand. The lack of true understanding of the program causes the low number Thai student population in this subsector in the U.S. There are also growing numbers of bi-lingual schools. High school graduates from these schools are a good potential market for community college and undergraduate degree programs in the United States.

The other area with growth potential is high school students from Thailand. Currently, Canada, New Zealand and Australia are the major destinations for Thai high school students studying abroad. School fees in these countries are

Statistics

Capital: Bangkok
Population: 67,741,401 (est. 2014)
GDP (USD): 673 billion (est. 2013)
Currency: Thai baht (THB)
Language: Thai (official)

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more competitive than fees of schools in the United States and United Kingdom. Moreover, most of the schools in Canada, New Zealand and Australia work with agents to promote their institutions, while most of the schools in the United States do not.

Current Demand

The demand to study abroad for an undergraduate degree is growing continually. However, 45 percent of the Thai overseas education market is still dominated by postgraduates and higher education students, 30 percent undergraduate, and 25 percent high school and short term program students (one year exchange students and ESL students). Student Exchange and summer programs are still popular programs among youth and high school students as a pathway of learning Western culture and English language with native speakers. Due to the lack of English proficiency, Thai students frequently enroll in universities that offer ESL and English-intensive programs. The most popular academic programs are business administration, computer information, engineering, and mass communication.

- Two-year, Community College
- Business Administration, Graduate and Undergraduate Degrees
- 4-6 week Summer Language Training and Cultural Programs
- One-year Exchange Program for High School
- Boarding High School

Resources

- The American Chamber of Commerce in Thailand, amchamthailand.com
- Thai International Education Consultants Association, tieca.com/?switch_lang=1

Turkey

Overview

Turkey's population of 76.7 million is relatively young when compared with many other countries. Over 30 percent of the population is under the age of eighteen. This young population provides considerable opportunities for international education institutions.

As of December 2013, there are 109 public and 70 private foundation universities serving five million students in various academic programs. 2013 figures reveal that 2.75 million students are enrolled in undergraduate programs, 218,000 in master's programs, 60,000 in Ph.D., 20,100 in doctors in residency programs and 2.23 million in the Open University. Public universities charge a small fee, whereas private university tuition costs range from USD 6,000–25,000 per year. Many outstanding students of limited means are able to attend private universities on merit scholarships.

Entrance into universities is very competitive due to the limited capacity of Turkish universities. Students need to pass a nationwide placement test that takes place once every year in June. Every year an increasing number of students take the exam. In 2013, 1,923,033 high school graduates took the exam and around 25.6 percent of these applicants were enrolled in a 4-year program, 20.3 percent in a 2-year program, and 11 percent to the Open University (distance education in the various subfields). The rest were unable to enter any higher education program. In Turkey, the Ministry of National Education is responsible for administering all educational services in the country, excluding higher education. The Council of Higher Education (YÖK) is a 22-member corporate public body responsible for the planning, coordination and supervision of higher education.

The number of Turkish universities is insufficient to meet the increasing demand for higher education, thus there is a large Turkish student population studying abroad. Many students willing to study abroad place American universities at the top of the list due to the quality of education and good career prospects. Over

Statistics

Capital: Ankara
Population: 81,619,392 (est. 2014)
GDP (USD): 1.167 trillion (est. 2013)
Currency: Turkish lira (TRY)
Language: Turkish

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33,000 Turkish students go abroad for university education. U.S. colleges and universities already attract around one third of these students for undergraduate and graduate programs, as well as specialized training.

The Institute of International Education's Open Doors 2013 Statistics show that Turkey, with its 11,278 students, is the 10th leading place of origin for students in the U.S., right after Mexico and surpassing Germany, France and the U.K. Turkey ranks number one among European countries with the number of students in the U.S. Turkish students also constitute the seventh largest student body in the U.S. for intensive English programs.

Market Entry

There are more students interested in higher education than can be accommodated by the Turkish universities. Thus, good opportunities exist for American universities and colleges to explore a rapidly growing market. The results of the central university placement exam in Turkey are not announced until mid-August. Overseas schools that can accept unmatched or dissatisfied students for the second semester/quarter have an advantage.

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 top "brand name" universities. Cost is not a critical factor in their decision-making process as the scholarship sponsors pay for their entire studies and the scholarship holders are usually bonded to work with their sponsoring organizations for about 4-8 years after they graduate. The student decisions are based mostly on the reputations of institutions, the faculty, and the programs.

Due to the competitive nature of the Turkish labor market and the significant level of unemployment, many students feel the necessity to have a post graduate/masters degree to be able to find better jobs. These programs are even more competitive, so students seek [28] placement at foreign universities. Graduate studies are the most popular level of enrollment for Turkish students.

Several Turkish universities have cooperation programs with American universities and their students have opportunities to continue their education in the U.S. institutions. Other American institutions may wish to pursue such cooperative agreements as well as student exchange programs to attract qualified Turkish students.

Many students and professionals opt for supplementary English language education to improve their command of English, as fluency in English provides a competitive advantage in job hunting and career prospects. This opportunity gives U.S. firms a chance to compete in the market by providing private English language courses in Turkey and intensive language programs in the United States.

Current Demand

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

- Business administration and economics (especially MBA programs in finance, marketing and international business)
- Engineering, computer science and other technical fields
- 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, and video production)
- Medicine and other medical fields (for the most part, advanced level residencies)
- Natural and physical sciences

United Kingdom

Overview

According to the Institute of International Education's 2014 Open Doors Report, the United Kingdom is ranked 13th among countries sending students to the United States for higher education and training. The UK has ranked in the top 15 senders for many years, and the number of students has risen for six consecutive years, reaching a new peak in 2013–14.

During the 2013–14 academic year, a total of 10,191 students from the UK studied in the United States. Aside from a record number of students, this also represents an increase of 7.6 percent from the previous year. The largest group of British students in the United States is undergraduates (49.6 percent). Graduates make up 23.9 percent, and the remaining students are categorized as other (18.2 percent) and Optional Practical Training (8.3 percent).

Last year, UK students in U.S. colleges and universities contributed USD 338 million to the U.S. economy. It is also interesting to note that the UK is by far the leading destination for American study abroad students, hosting 12.5 percent of the total.

Market Entry

Considering the large number of American students coming to the UK, exchange programs and partnerships with UK universities are a common method of market entry. For U.S. schools looking to gain exposure and to test the market, the US-UK Fulbright Commission's USA College Day is a well-established and growing event. Taking place each September in Central London, the 2014 USA College Day attracted over 4,700 students.

The recent change to the university tuition structure, and to the United Kingdom's international education strategy, has created opportunities for the recruitment of British students to the United States. Tuition fees were first introduced across the UK in September 1998. At that time, the UK government set a cap on fees of £1,000

Statistics

Capital: London
Population: 63,742,977 (est. 2014)
GDP (USD): 2.387 trillion (est. 2013)
Currency: Pound Sterling (GBP/£)
Language: English (official)

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a year (approx. USD 1,700). Prior to this date, tuition was free and thus studying outside of the UK was a difficult financial burden for many. Since tuition was introduced in 1998, it has further increased and various regulations have come into force for each of the countries within the United Kingdom (England, Northern Ireland, Scotland, and Wales). Since 2012, tuition fees in England are at a maximum of £ 9,000 per year (approx. USD 15,300).

In September 2013, the UK government launched its international education strategy, Global Growth and Prosperity. The strategy focuses on encouraging foreign students to study in the UK, but also places emphasis on actively encouraging British students to study and travel outside of the UK. This portion of Global Growth and Prosperity is called the Strateg

Current Demand

The United Kingdom's educational system is well established, with its own international reputation and regard. The best prospects for attracting British students to the United States lie in the undergraduate and graduate areas of study. According to the Higher Education Statistics Agency (HESA), the most popular subjects for UK undergraduate students in 2012–13 were business and administration, biological sciences, social studies, subjects allied to medicine, and creative arts and design. At the graduate level, the most popular subjects were business and administration, education, subjects allied to medicine, social studies, and engineering and technology.

Trade Events

- U.S.–UK Fulbright Commission's USA College Day (September), bit.ly/1zoE4gs

Resources

- U.S.–UK Fulbright Commission, fulbright.org.uk
- UK International Education Strategy: Global Growth and Prosperity, bit.ly/1vAWeu8
- UK Strategy for Outward Mobility, bit.ly/13LQI0y

Vietnam

Overview

Educational exchange is a cornerstone of the U.S. bilateral relationship with Vietnam and a top prospect opportunity for U.S. universities and educational institutions. The number of students from Vietnam fluctuated moderately throughout the 1980s and 1990s with a steady trend of growth beginning in the late 1990s. With 16,098 students studying in the U.S. in the 2012-2013 academic year, a year-on-year increase of 3 percent, Vietnam topped the Southeast Asia in terms of students learning there. The figure is also the eight highest among countries having students in the U.S. The mutual understanding between the two countries' students will play a key role in the process of expanding the two countries' bilateral relations and consolidating their comprehensive cooperation.

A significant increase in per capita income in the past 10 years, the robust expansion of both the manufacturing and service sectors, and the value Vietnamese traditionally place on education are creating substantial opportunities for education and training services providers.

However, competition will continue to grow as globalization creates more opportunities for study elsewhere. Competitors in Asia (including Australia and Singapore) promote proximity, affordable costs, and the possibility of post-graduation employment.

Currently, there are 234 universities and 185 colleges operating in higher education system in Vietnam. Vietnamese universities had room for only about 600,000 of the 1.8 million candidates who took university/college entrance exams in 2013.

Statistics

Capital: Hanoi
Population: 93,421,835 (est. 2014)
GDP (USD): 358.9 billion (est. 2013)
Currency: Vietnamese dong (VND)
Language: Vietnamese

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Improving domestic education is a top priority in various Vietnamese Government plans and initiatives which include ambitious goals, such as a 10 percent annual increase in domestic university enrollment and developing a higher education system more in line with regional and global standards. To this end, recently the Vietnamese Government has increased budget allocations, liberalized private sector involvement, and encouraged foreign participation in developing education and training services in Vietnam. However, many observers find the reform process to be slow, and domestic higher education falls far short of meeting demand.

Market Entry

Appoint a Representative

Local representation is essential for the success of any American schools in the Vietnamese market. Local students and parents tend to depend on people who are located in Vietnam, with whom they can communicate about the many issues involved in applying for admission and studying in the U.S. A representative could be an alumnus or someone with ties and familiarity with your school to handle in-country marketing, outreach and serve as a local point of contact. U.S. education institutions often appoint a professional education agent to market their school. Education agents typically represent other schools—from the U.S. or other countries—and provide a wide range of counseling services directly to parents and students. U.S. schools seeking agents should thoroughly vet prospective partners.

Establish an Alumni Network

One of the most effective and low-cost ways of recruiting students is to establish and support an alumni network in Vietnam. There is no better promoter of your school than a student who achieved success and returned to Vietnam to tell his/her friends and family about their experiences.

Exhibit at Major Education Fairs

There are several education fairs in Vietnam annually, including fall and spring events organized by the Institute of International Education (IIE). According to IIE's statistics, these events are the largest and most-attended events of their kind in Vietnam. IIE's well-established reputation and professional expertise offer U.S. education institutions a convenient and cost-effective method to obtain first-rate exposure in Vietnam.

Stand-alone Marketing Events

Universities or university consortia frequently organize outreach visits to local high schools, and hold seminars and counseling sessions, often employing a local partner or representative to organize and handle the necessary paperwork and public event approval process.

Become Familiar with Vietnamese Education-related Organizations

U.S. Schools should familiarize themselves with the many groups in Vietnam that are promoting U.S.–Vietnam education exchange such as the nonprofit organization VietAbroad.

(vietabroad.org) and the recently-established Vietnam Education and Training Consortium (VETEC, vetecusa.org/en).

Vietnamese Materials and Websites

While many prospective students are comfortable with English, schools will reach a wider audience—and appeal to more parents—with Vietnamese promotional materials and websites.

Business Etiquette

The cultural concept of *face* is extremely important to many Vietnamese. It is important to avoid putting your Vietnamese counterparts in an embarrassing situation and to use tact and discretion when dealing with uncomfortable situations.

Consensual decision making is very deeply ingrained in Vietnamese social and political behavior, and often means that all parties with a voice can wield a veto and must be brought on board. Negotiations may appear to take longer than necessary; be patient, remember that decisions often have to go through a lot of bureaucratic red tape and group consultation.

For more information about business etiquette and customs, please contact your local U.S. Commercial Service office.

Current Demand

4-year Degree University Study

More Vietnamese students are pursuing 4-year study in universities. Business management, banking and finance, engineering, science and technology, IT, and health care programs are often their top choices.

ESL and English Preparatory Programs

As Vietnam transitions to a market economy, English skills are becoming essential for many job seekers. Schools that offer ESL and English preparatory programs are attractive choices for students who need to develop these skills before starting their college programs.

Technical and Vocational Training

Vietnam has a growing demand for skilled workers and production technicians as industrial sectors become a main provider of employment. According to the Ministry of Education and Training (MOET), the country needs 10,000-15,000 skilled workers trained each year in the service and industrial fields. Training facilities in Vietnam cannot satisfy this demand effectively which presents an opportunity for American schools to provide much-needed professional training.

Community Colleges

Community colleges offer financial and academic accessibility, serve as a bridge for Vietnamese students to acclimate to English, American culture and the U.S. education system, as well as a transition to four-year universities. Vietnam is the fifth largest country of origin for students at U.S. community colleges.

Programs aimed at cultivating 'Soft Skills'

Due to the rote-learning style of the Vietnamese education system, there is a need to cultivate skills such as leadership, public speaking and teamwork.

Boarding schools

In the past, few students from Vietnam pursued boarding school in the United States, opting instead to enroll later in community colleges and universities. Recently, there is growing interest among Vietnamese families in sending children to the U.S. to enroll in high school and high school finishing programs (generally grades 9 to 12) to better prepare for U.S. college admissions. In addition, parents in Vietnam cite their desire for providing a safe, comfortable environment for their kids as primary criteria for selecting boarding schools. Several education recruiters in Vietnam have expressed interest in representing U.S. boarding schools, reflecting this growing trend.

Resources

- Institute of International Education, iie.org
- Vietnam Education and Training Center, vetecusa.com
- Viet Abroad, vietabroad.org
- Vietnam Education Foundation, vef.gov
- Higher Engineering Education Alliances, heea.org
- American Chamber of Commerce in Vietnam, amchamvietnam.com
- Embassy of the Socialist Republic of Vietnam in the USA, vietnamembassy-usa.org
- Consulate General of Vietnam in San Francisco, vietnamconsulate-sf.org/en
- Vietnam Ministry of Planning and Investment, bit.ly/1BftFG4
- Vietnam Economy, vneconomy.vn



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Market Reference Chart

	Best Prospects					Best Student Recruitment Methods				
	High School	Boarding Schools	Undergraduate	Graduate	OPT	English as a Second Language	Education Agents	Institutional	Student Outreach	Online Outreach
Australia			✓	✓				✓	✓	✓
Brazil			✓	✓		✓		✓	✓	
Canada			✓	✓				✓	✓	
Central America Region			✓	✓	✓	✓	✓	✓	✓	
Chile	✓		✓	✓	✓	✓		✓		
China	✓		✓	✓	✓	✓			✓	
Colombia			✓	✓		✓		✓		
Czech Republic			✓	✓				✓	✓	✓
Denmark	✓			✓	✓			✓	✓	
France	✓		✓	✓	✓	✓	✓	✓	✓	
Germany	✓		✓	✓		✓		✓	✓	
Hong Kong	✓	✓	✓	✓		✓			✓	
India			✓	✓	✓		✓	✓	✓	✓
Indonesia			✓	✓	✓		✓		✓	
Israel			✓	✓	✓		✓	✓	✓	
Japan		✓	✓		✓	✓		✓	✓	
Kazakhstan	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Kuwait			✓	✓		✓		✓	✓	
Malaysia			✓	✓	✓			✓	✓	
Mexico	✓	✓	✓	✓		✓		✓	✓	
Nigeria			✓	✓	✓			✓	✓	
Romania			✓	✓	✓	✓		✓	✓	
Saudi Arabia			✓	✓	✓	✓		✓	✓	
Serbia			✓	✓	✓	✓			✓	
South Korea	✓	✓	✓	✓		✓		✓	✓	✓
Spain	✓		✓	✓	✓	✓		✓	✓	
Taiwan	✓	✓	✓	✓	✓			✓	✓	
Thailand	✓		✓	✓		✓		✓		
Turkey			✓	✓	✓	✓		✓	✓	
United Kingdom			✓	✓				✓	✓	
Vietnam	✓	✓	✓	✓	✓	✓			✓	



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