STRATEGIES TO RECRUIT U.S. STUDENTS TO STUDY IN OTHER NATIONAL SYSTEMS

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The views in this publication are those of the author(s) alone. They do not necessarily reflect the views of the German Academic Exchange Service (DAAD).

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INTRODUCTION

EXECUTIVE SUMMARY
This report is an attempt to create a profile of the strategies undertaken by the education systems of selected countries to attract American students to study within those systems either for the short or long term.

The report was sponsored by the German Academic Exchange Service (DAAD). DAAD staff chose several national education systems as targets for the study which they perceived are making a strong effort to attract American students. The target education systems are those of Australia, Canada, France, Netherlands, New Zealand, and the United Kingdom. To balance the report, the DAAD also agreed to showcase their own efforts to attract American students to Germany. By profiling its own outreach efforts DAAD hoped to create a truly global portrait of student recruitment efforts targeted at the United States.

ASSUMPTIONS
The assumption behind this report is that the ability to attract students from all world areas has become a priority for many governments and educational systems. Governments have come to see the internationalization of education as an opportunity to enrich their academic culture and prospective work force. As a result of this perspective, governments have attempted to assert national level efforts which enhance the ability of the entire educational sector to improve its ability to attract students from other countries. The motivation to assert change as a means of removing barriers to international educational interchange has also served as a driving force for domestic educational reform. Finally, the growing importance of internationalizing education has led governments to see education within the framework of foreign policy and increasingly of international trade.

Given this, It was assumed that each country would have unique academic traditions and cultural environments which would provide both attractions and barriers to the mobility of students. To increase student mobility, each country would have to create distinct strategies based on the nature of its educational system and the traditional interaction between education and government. Thus the intent of the study was to create a portrait of each target country’s efforts to gather momentum, forge collaborative efforts, identify strategies, and remove barriers.

While the goal of the project was to outline “national” strategies for recruitment, the very idea of national had to be defined broadly. Thus for the purposes of this study “national” is determined to mean collaborative efforts of a majority of the education sector whether or not those efforts are supported by the governments of the target countries.

It was also assumed that these “national” efforts would inevitably be directed towards global recruitment and not only towards the United States. Nevertheless, the project intended to single out, where possible, strategic decisions of a given national initiative which were focused primarily on attempts to attract American students.

METHODOLOGY
The report involved three methodologies. Senior officials of organizations representing the target countries were selected by the author and interviewed to provide detail on organization structure and strategies. Web based research, generally on the websites of organizations concerned with student recruitment, was conducted to capture a sense of each country’s message to prospective students. Finally, senior American student
mobility experts were consulted in order to compare and contrast an American perspective with that of representatives of the target country. This was done both through interviews and through a survey which was distributed to participants in the DAAD German education tour and broadcast electronically on mail servers utilized by the U.S. international education community. The survey (included as an appendix) attempted to gain American educators’ perceptions on four questions for each country. The questions were:

- What is the primary motivation for recruiting American students?
- What are the target student groups (study abroad, undergraduate degree, graduate degree)?
- What are the primary attractions for Americans?
- What are the primary barriers for Americans?

Although the response to the survey was not large it did demonstrate clear patterns of perceptions and offered helpful anecdotes which were added to the individual country profile.

Based on this methodology, the results are inevitably subjective. Each profile represents a consensus on the part of key individuals and summarized by the author. Each respondent was, however, given the opportunity to offer changes to the profile and the final report incorporates those changes.

CONCLUSIONS
The common thread in all of the countries studied was that the creation of multi-institutional, nationwide collaborative efforts to recruit students from other countries was recognized as being critical to growing student mobility. The diverse way these international student recruitment efforts are implemented reflects the differing and fluctuating roles of the government and education communities in each country in setting education funding and strategic priorities. In some countries the government provides the core funding for external, collaborative recruitment efforts. In others, the government role is more regulatory-that of paving a path of least resistance in areas of need. No clear pattern emerged which predicted when recruitment efforts would be institutionally funded and institutionally driven and when those efforts would be initiated by the government. In all the countries studied, however, the effort to collaborate proceeded more quickly when the national government encouraged the effort, either through funding, regulatory relief, or political support.

In each system studied the historical context of education planning and international mobility efforts provided clues to the direction taken by their current strategies. For example the Netherlands recognizes its own geographic and linguistic limitations. Based on this it has pioneered the adoption of multilingual, primarily English, curricula in its universities as a gesture to attracting greater numbers of students. In the UK and Australia, a philosophical shift away from central education funding and planning foreshadowed later efforts to recruit new students from outside national borders.

On the other hand, some countries have had to undergo major ideological shifts in order to begin active educational promotion efforts. One expert suggested that in the recent past certain countries not only had no national effort to promote, but actually considered international students as potential asylum seekers and burdens to the public interest. The fact that these same countries have now changed course to actively promote the idea of international student mobility is evidence that the education sector is gradually being recognized as a key force in the globalization of economies. In a similar vein, cultural pride, manifested through efforts to maintain and promote the native
language, has proven to be a barrier to the ability of students from the U.S. and other world areas to actively become engaged alongside of host country students. Over time, however, the inevitability of English as the world language is being recognized and academic traditions are being modified as a result.

In addition to distinct strategies within given countries there also appear to be regional trends, particularly in Europe. As the same expert noted, willingness to adopt market strategies to education seem to be evolving slowly from north to south. The United Kingdom, which saw a major decentralization of its education funding and planning under Margaret Thatcher, and which has the advantage of English as its language of instruction, has led the efforts to actively promote student recruitment. Continental European countries have more recently begun to adopt strategies which involve some coordination at the national level. In addition, throughout Europe the progress of the European Union towards intra-European academic mobility has provided the impetus to begin to overcome many common barriers. These same efforts, having been forged in a European crucible, are becoming useful as intentions slowly become more global in outreach. For example, European education leaders have led a long and arduous effort to create transparency and comparability of degrees and diplomas between nations. This has led, among other directions, to the creation of the ENIC/NARIC network and the European Credit Transfer Scheme. These structures clearly provide a framework for more consistent and fair evaluation of non European credentials as well as a documentation system more easily recognized by American institutions.

Throughout all of the countries the motivations for enhancing recruitment efforts reflect the shifting tides of educational planning and funding. Universally there is an ongoing tension between a social imperative and a market imperative for recruiting international students. The social imperative encourages greater international student interaction for increasing global awareness of local populations. The market imperative encourages enhancing revenue through fee paying students who also invest in the local community. While this study attempts to characterize a core motivation for each country, in truth each country studied seeks, in its own way, to balance these motivations. American students, which are the focus of this study, are clearly seen as able to pay and this has to be seen as a strong motivation for coordinating active efforts to attract them in the short term. Beyond this, however, there also appears to be an assumption that American students are likely to be active players in the economy of the future. Based on this assumption a longer term motivation for encouraging American students to study in a given country is that a positive perception of the host country, and the friendships made, are investments in the potential for future economic and political partnerships.

ACKNOWLEDGMENTS

The names of contributors to each country report are listed at the end of that report. American professionals who responded to the survey are not listed individually but their contributions are nevertheless acknowledged. Beyond these contributions, Bernd Waechter, ACA, John Wells, Arcadia University, and Heide Naderer, DAAD reviewed the document in its entirety. Both the author and the DAAD staff extend their deep appreciation and thanks to all contributors for graciously giving their time and thoughts in support of this report.

John Deupree
February, 2002
AUSTRALIA

I. CORE DATA

U.S. Study Abroad Enrollments in Australia 1998-1999: 5368
(Source: OPEN DOORS, Institute of International Education)

U.S. Study Abroad Enrollment in Australia 1999-2000: 6329
Percentage Change: +17.9
Previous year’s percentage change: + 23
(Source: OPEN DOORS, Institute of International Education)

11 Students (2001)
(Source: Institute of International Education)

Number of Student Visas Issued to American Students:
1998: 3822
1999: 5751
2000: 6265
2001: (through September) 7034
(Source: Australian Education Office)

Average Annual Tuition at Australian Universities:
$3600-7200 U.S.

Estimated Monthly Budget for Living Costs:
$165 per week U.S.
(Source: www.studyinaustralia.gov.au)

II. OFFICES WITH RESPONSIBILITIES FOR COORDINATING PROMOTION OF EDUCATION IN AUSTRALIA TO AMERICAN STUDENTS

AUSTRALIAN EDUCATION OFFICE
1601 Massachusetts Avenue, NW
Washington, D.C. 20036
(Within Australian Embassy)
Tel. 202 332 8285
www.austudies.org/aeo

Role
- Profiles Australian education in a positive manner
- Raises awareness of a positive educational environment
- Creates an environment favorable to the creation of linkages
  AEO does not deal directly with students. It refers student inquiries to one of several organizations which handle student advising and enrollment on behalf of Australian universities depending on the individual student’s interest or directly to the Australian university.
III. OTHER U.S. OFFICES FOCUSED ON AUSTRALIAN EDUCATION PROMOTION

IDP EDUCATION AUSTRALIA
1616 P Street, NW, Suite 150
Washington, DC 20036-1400 USA
Tel: 202-332-3295
Fax: 202-332-3297
Toll Free U.S.: 866-788-3969
info@Washington.idp.edu.au
www.idp.com

Role
IDP provides counseling, assessment, and enrollment services for a fee to individual students enrolling in Australian universities as well as development and research services.

History (from IDP Website)
IDP was established in September 1969 as the Australian-Asian Universities' Cooperation Scheme (AAUCS). Its mission was to strengthen teaching and research in a number of institutions in Indonesia, Malaysia, Philippines and Thailand. The organization was set up as an aid body, funded by the Australian Government. A Standing Committee of the Australian Vice-Chancellors' Committee determined overall policy.

For two decades, IDP focused primarily on educational aid and worked closely with government and institutions. As the aid program expanded to include the South Pacific, the AAUCS name was changed to accommodate non-Asian institutions. In 1981, AAUCS was re-named the Australian Universities International Development Program. However, by 1984, the contribution of Australian Colleges of Advanced Education was recognized and the company's name became the International Development Program (IDP) of Australian Universities and Colleges. This name was changed to IDP Education Australia in 1994.

IDP's U.S. office is based in Washington DC and has been re-structured from January 2002. It will seek a higher profile among students, education institutions, particularly universities and colleges, and U.S. international education agencies. It will emphasize its ownership by all of Australia's universities, its comprehensive range of services, and its global perspective demonstrated by its network of offices in 35 countries. While its priority will be on U.S. students studying in Australia, it will be also encourage flows of Australian students to the U.S. Its services in the U.S. will cover advice, placement and support services for study abroad students as well as for full degree students. Its approach in the postgraduate area will be to focus on areas of excellence in Australian universities, with specializations which are world leaders or uniquely Australian.

The new IDP office is co-located with the International Student Exchange Program (ISEP) in Washington DC. It works collaboratively with the Australian Education Office, with agreement on the different activities and responsibilities of each organization.
IV. HISTORICAL CONTEXT

In the mid 1980’s the government of Australia provided 85% of funding to universities. In the ensuing years that percentage has dropped to less than 50% and Australian universities have been handed a clear mandate to compete in the global marketplace to enhance revenue flows and to establish Australia’s presence as a leading education force in Asia.

In the early 1990’s a Labor government conceived and created the Australian International Education Foundation (AIEF) which was intended to promote Australian education on a global scale in a collaborative fashion. The government created a challenge grant program whereby it would match education sector funding with a two for one grant. Historically the AEO existed before the AIEF but received AIEF funding for two years in the early 90’s.

The AIEF was created by the Australian Department of Education, Employment, and Training. Given that this was a domestically focused ministry, its experience with foreign deliverables was limited.

The AIEF, now operating as Australian Education International (AEI) continues as a government funded entity primarily focused on the recruitment of students from Asia.

Funding from AEI does not support any efforts in the U.S. except where the AEO bids for and wins funding for specific initiatives.

V. CORE GOALS FOR ATTRACTING AMERICAN STUDENTS

Australian education is self described as flexible, market driven, and entrepreneurial. Recruitment is designed to enhance university revenues.

VI. TARGET AMERICAN AUDIENCES

- Undergraduate Study Abroad Students
- Graduate Students

VII. CORE NATIONAL STRATEGY

There is little or no government support for the promotion of Australian education to the United States. Universities are competitive and autonomous but are nevertheless convinced that collaborative efforts to promote education are a positive investment. The phenomenon is viewed as comparable in strategy to that of competing businesses.
locating next to each other and therefore drawing greater crowds than if they were off on their own.

Thus while institutions are competitive they have collaboratively formed a variety of jointly owned and funded organizations which promote Australian education both globally and specifically in the United States. These organizations are all self funded and entrepreneurial and to some degree compete with each other.

Australian education as a whole is a leader in responding to market needs by developing curricular programs which meet current demands and by pioneering new forms of educational delivery. Australia is a leader in delivering education directly to the student, often referred to as “exported education”, in addition to its strong efforts to recruit students into its universities.

VIII. ORGANIZATIONAL STRATEGIES
Organization of Core agencies
AEO is focused entirely on the North American student market. It is funded primarily through subscriptions from all 38 Australian universities that are members of the Australian Vice Chancellor’s Committee. It has a staff of two located in the Australian embassy in Washington, D.C.

IDP is funded privately. IDP is a non-profit owned by all of Australia’s universities. Its role is the global promotion of educational services and development and it has had a limited role in the United States. The IDP office in the U.S. is less than one year old.

Education Sector Oversight
AEO is managed by a board of directors representing Australian member institutions and selected American experts.

Government Oversight
There is no current government oversight, although the embassy in Washington does have one seat on the AEO’s Board of Directors. The AEO does provide services to the Australian government such as data collection, handling of inquiries, and political advice and support in relationships with American education.

Economic Model
AEO: The Australian Education Office in Washington, D.C. is focused entirely on student mobility between Australia and North America. It is jointly funded by the 38 Australian universities that are members of the Australian Vice-Chancellors’ Committee. AEO’s only contribution from the Australian government is the office in the embassy and occasional grant awards for which it must compete and which are targeted to specific programs. One estimate is that less than 10% of its funding comes from government sources.

IDP: IDP is owned by 37 universities. It charges commission to each university for every student enrollment it handles. Because it is a non profit it cannot redistribute any surplus back to its owners but instead invests this in emerging markets which individual institutions would not otherwise be available to afford.

IX. TARGETED RECRUITMENT EFFORTS
Exhibits and Conferences
The AEO coordinates Australian university representation at NAFSA and plays a lead role in profiling Australian universities at other conferences in the U.S.

IDP exhibits competitively at the same conferences but for different services.
Publications
The publication Australia: Education Quality, Education Excellence, produced annually by the AEO, is distributed to 2,000 study abroad advisors in the USA as well as to students requiring information on study opportunities in Australia.

Websites
The government of Australia funds the official government website for international students at www.studyinaustralia.gov.eu. The website is focused on the global student marketplace and as such is multilingual.
Specific information for U.S. students is featured on the AEO website at www.ausstudies.org/aeo.

Program Providers
AEO works through key American university consortia such as those operated by Arcadia University and Butler University to facilitate student flow and reduce costs. IDP seeks to enroll and manage student affairs of students studying in Australia and in some ways competes with the program providers. Another organization, AUSTRALIAN, privately represents a subset of Australian institutions and also competes for student share.

X. SELF PERCEIVED BARRIERS TO INCREASED AMERICAN STUDENT ENROLLMENT AND STRATEGIES FOR ELIMINATION

Assessment
The question of producing an equitable entrance assessment tool for non Australian students has led Australian universities to begin to accept a combination of SAT's, Advanced Placement (AP) scores, and International Baccalaureate credentials for international undergraduates and GMAT's for graduate business students.

Language
Because English is the language of instruction there is a disincentive to those American students who truly want to be immersed in a foreign language.

Distance
The long flight and expense of the flight puts Australia at a disadvantage relative to Europe.

Housing
Australian universities offer housing to all students, although Australian students would typically move into shared rental housing after the first year. Australian universities are aware that American students are typically more demanding in terms of quality of housing and in amenities. They are also aware that American students will usually select full or partial board options when they arrive.

Logistics
Although no particular accommodations have been made, in general, American undergraduate students are viewed as less willing or able to function on their own and it is expected that they will seek out assistance from university staff.

Quality
Australian education is self perceived as much more outcome and performance based than American education. American education is perceived as more concerned with
contact time than with outcome. This conflict of styles occasionally creates confusion on the part of students.

Calendar
The Australian academic calendar begins in January and ends in December which does not allow for close coordination with the American calendar. Most universities have a semester system with a short break in June. Bond University has a trimester system and this may be a causal effect in the fact that its American enrollments are higher. However the trimester system was not put in place for this reason. In addition the academic calendar Australia’s location in the southern hemisphere provides a disconnect with the American seasons.

Credentials
Two credentialing aspects provide barriers to American student enrollment.
1. U.S. credential experts do not perceive the Australian three year undergraduate degree as providing an entrance credential to an American Masters. For this reason there is almost no incentive for American undergraduates to consider enrolling in Australian degree programs.
   Strategy for overcoming: AEO intends to approach American professional accrediting bodies to attempt to negotiate broader understanding and recognition of Australian credentials.
2. The Australian grading system is based on five step scale. Although the terminology is different (Students are rated on a system of high distinction, distinction, credit, pass and fail). Because this is a five point system American registrars often simply translate Australian marks into an American five point scale of A-E. Australian educators, however, believe the Australian scale is based on a different set of expectations than an American one. For example, while A and B grades are common in the U.S., very few students in Australia are awarded “high distinction” or “distinction”. Therefore Americans often go home with an assessment in the range of “credit”. While this is quite acceptable in Australia “credit” is frequently translated as a “C” in America which is not considered acceptable in the home environment. This has caused considerable tension and misunderstanding.
   Strategy for Overcoming: Several universities are experimenting with offering “PASS/FAIL” grades for American students as their take home credit. Others are experimenting with having American professors at the Australian universities assess the American student’s grade using American standards, and offering an alternative grading report on this basis. Unfortunately, many American institutions do not accept “PASS/FAIL” as an adequate assessment of a study abroad experience.

XI. SELF PERCEIVED STRENGTHS
Costs
- Lower tuition than United States or United Kingdom and significantly lower living costs.

Safety
- Safe society with high standard of living.

Environment
- Multicultural
- Close to Asia providing a “Gateway to Asia” to students who want to study Asian issues but are reluctant to live in Asian countries.
- Great Scenery and outdoor opportunities.

**Quality and nature of education**
- Education system is outcome and performance based and is flexible and market driven.
- Outdoor fields, such as environmental studies, marine biology, etc. are strong attractions.

**XII. SELF PERCEIVED SUCCESSES OR FAILURES**
The creation of the AEO is credited with significant rise in the number of U.S. students studying abroad in Australia.

The use of U.S. based program providers who recruit and manage students on behalf of a wide range of institutions has eased the process for students and greatly encouraged mobility. At the same time, however, competition to provide information, and the corresponding lack of a “one stop shop’ which represents all universities has created difficulties for students to objectively compare options for study in Australia.

**XIII. INDIVIDUALS CONTRIBUTING TO THIS STUDY**
Tony Crooks, Australian Education Office
Dorothy Davis, IDP Education Australia
Gail Fink, IDP Education Australia
Mitch Leventhal, IDP Education Australia
John Wells, Center for Education Abroad, Arcadia University and Formerly Australian Education Office

**XIV. PERCEPTIONS OF AMERICAN PROFESSIONALS (FROM SURVEY)**
- A majority of respondents perceived that revenue enhancement was the primary motivation for Australian efforts to recruit American students.
- A majority of respondents perceived that the primary student target group for Australian recruitment efforts is study abroad students.
- A majority of respondents perceived that environment and language were the primary attraction for American students.
- A majority of respondents perceived that cost and academic calendar were the primary barriers for American students. Other comments included the distance and lack of “the exotic”.

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CANADA

I. CORE DATA

U.S. Study Abroad Enrollments in Canada 1998-99: 809
(Source OPEN DOORS, Institute of International Education)

U.S. Study Abroad Enrollments in Canada 1999-00: 1275
Percentage Change  +57.6
(Source OPEN DOORS, Institute of International Education)

Number of Fulbright Students and Scholars in Canada in 2000-2001
Scholars-6 (2000)
Students-17 (2001)
(Source Institute of International Education)

Number of American Students Enrolled in Universities in Canada
The Canadian embassy estimates that there are 4-5000 American degree seeking students at Canadian institutions. The numbers have nearly doubled in a few years.

Tuition and Costs Canadian Universities
$10,000 U.S. for tuition and living costs is at an average figure offered on websites.

II. OFFICES WITH RESPONSIBILITIES FOR COORDINATING PROMOTION OF EDUCATION IN CANADA TO AMERICAN STUDENTS

CANADIAN EMBASSY IN UNITED STATES

Office of Academic Relations
Embassy of Canada
501 Pennsylvania Avenue
Washington, D.C. 20001
Tel: (202) 682 1740
www.canadianembassy.org/study

Role
The academic relations director provides guidance and encouragement to Canadian institutions on promoting Canadian educational opportunities within the United States together with his duties of supporting Canadian Studies in the United States.

III. OTHER NATIONAL OFFICES CONCERNED WITH INTERNATIONAL STUDENT INFORMATION AND RECRUITMENT

ASSOCIATION OF UNIVERSITIES AND COLLEGES OF CANADA (AUCC)
350 Albert St.
Ottawa, Ontario
Canada K1R 1B1
Tel. 613 563 1236
info@aucc.ca
www.aucc.ca
Role
AUCC is a membership education association in Canada which supports a broad range of activities on behalf of Canadian institutions. AUCC provides direct internet links to its member institutions through its website. It coordinates exhibits of Canadian institutions in the U.S. and other areas. It also prepares the core publication on Canadian education with the direct support of the Department of Foreign Affairs and International Trade.

CANADIAN EDUCATION CENTRES NETWORK
578 - 999 Canada Place
Vancouver, BC V6C 3E1
Tel: (604) 408-0588
www.cecnetwork.org

Role
The mission of the CEC (Canadian Education Centre) Network is to promote and market Canada as a destination for international students and as a source for international contract training. It is also to market Canadian distance education programs. The CEC Network provides high quality service and support to in-Canada and overseas clients and works to support Canada’s foreign policy and development assistance objectives worldwide.

Founded in April, 1995, the CEC Network is based in Vancouver and is a wholly-owned subsidiary of the Asia Pacific Foundation of Canada. It is a private non-profit company that receives some support from the Government of Canada; specifically, the Department of Foreign Affairs and International Trade, the Canadian International Development Agency, and Citizenship and Immigration Canada.

To date, there are 19 CEC offices in the following places: Argentina (Buenos Aires), Australia (Canberra), Brazil (São Paulo), Brunei, Chile (Santiago), China (Beijing), Colombia (Bogotá), Hong Kong, India (New Delhi), Indonesia (Jakarta), Malaysia (Kuala Lumpur), Mexico (Mexico City), Norway (Oslo), Singapore, South Korea (Seoul), Taiwan (Taipei), Thailand (Bangkok), Turkey (Istanbul), and Vietnam (Ho Chi Minh City).

The Network has received overwhelming support from Canadian education institutions. More than 290 institutions - universities, community colleges, career colleges, private and public secondary schools, language schools and training associations - are clients of the CEC Network. These institutions pay a modest, yearly fee for a number of services provided by our Canadian Education Centres (CECs) and in-Canada staff, such as material display at CECs and individual student counseling on programs.

(Source: www.cecnetwork.org)

CANADIAN INFORMATION CENTER FOR INTERNATIONAL CREDENTIALS
95 St. Clair Avenue West, Ste 1106
Toronto, Ontario M4V 1N6
Tel: (416) 962 9725
info@cicic.ca
www.cicic.ca

Role
The Canadian Information Center for International Credentials assists individuals who want to know how to obtain an assessment of their educational, professional, and occupational credentials by referring them to the appropriate bodies. CICIC also
provides explanations of Canadian education and links to Canadian institutions through its website. The CICIC is supported by the Council of Education Ministers of the Canadian provinces.

FULBRIGHT COMMISSION
Foundation for Educational Exchange Between Canada and the United States of America
350 rue Albert Street, suite 2015
Ottawa, Ontario K1R 1A4, Canada
Tel: (613) 237-5366
Fax: (613) 237-2029
info@fulbright.ca

Role
Placing Fulbright students and scholars at Canadian Universities (and recruiting Canadian scholars for American universities), providing orientation, assisting with housing and grant administration.

Canadian contribution $353,300 U.S. for the year 2000 to Fulbright Commission (Source: U.S. Department of State)

IV. HISTORICAL CONTEXT
Canadian tertiary education has long been a highly decentralized effort with authority lodged in the institution and the provincial government. National funding for education has been limited, and has always been directed to the province which in turn disseminates it to the institution.

Four years ago the Canadian minister for international trade suggested Canada should consider education as a “fourth pillar” of its foreign policy as one means of increasing Canada’s global outreach. Since that time the national government has supported the development of collaborative efforts within a range of Canadian institutions to support educational development on a global scale. This support has initiated a culture of collaboration within the Canadian educational community which had not previously existed. To some degree this collaborative precedent is now spilling over into cooperation among Canadian institutions interested in approaching the U.S. market. Given the historical tendency for institutional authority to be centered at the provincial level, however, the leadership and collaboration for recruitment remains largely provincial. As a result, some provinces, most notably Nova Scotia, have asserted stronger leadership in recruitment than others.

V. CORE GOALS FOR ATTRACTING AMERICAN STUDENTS
- Institutional revenue enhancement
- Internationalization

VI. TARGET AMERICAN AUDIENCES
- Undergraduate and graduate students

VII. CORE NATIONAL STRATEGY
The close proximity, common language for many institutions, and other commonalities between Canadian and U.S. education has led Canadian institutions to recognize that they compete directly with U.S. institutions for both Canadian and U.S. students. Thus the Canadian approach to attracting U.S. students is to compete on U.S. terms. This
implies that institutions are seeking to raise awareness about costs and program options directly with individuals in the United States who are in a position to influence young people’s college choices such as college counselors.

As a whole, institutions continue to compete individually on cost for U.S. undergraduate students alongside of U.S. institutions. There is evolving leadership on collaborative approaches which is most often centered at the provincial level. Canada also supports Canadian studies at select U.S. institutions and this provides an academic core for cooperation and exchange.

VIII. ORGANIZATIONAL STRATEGIES
The U.S. based academic relations director is a direct hire by the Canadian government. Although the primary, and traditional role, for this position has been to support Canadian Studies in the U.S., Canadian institutions have increasingly sought advice from the incumbent on how to best position themselves as they seek to expand their visibility within the U.S.

IX. TARGETED RECRUITMENT EFFORTS
Exhibits
Canadian institutions exhibit cooperatively at conferences targeted directly at U.S. secondary school college counselors. Chief among these are the National Association of College Admissions Counselors (NACAC) and associations of independent college counselors.

Canadian institutions also exhibit cooperatively at the NAFSA conference. Collaborative exhibits are coordinated jointly by the AUCC and the CEC.

Mailings/Publications
AUCC produces a promotional publication on Canadian education entitled “Reach Higher” which is distributed widely.

U.S. Media
U.S. national media such as the Washington Post, the New York Times, Kiplingers, and U.S. News and World Report have all run stories which underscore the fact that many Canadian institutions offer quality undergraduate degrees at a comparatively lower cost than many U.S. institutions. Canadian officials work with U.S. media to highlight these opportunities to promote study in Canada.

Advertisements
On occasion the embassy invests in advertising in selected U.S. publications targeted at U.S. students and parents.

Websites
There are a variety of websites on Canadian education supported by the Canadian government and various education sectors.

www.canadicanembassy.org.study is managed the Canadian embassy in the U.S. and is targeted directly at U.S. students.

www.studyinCanada.com is managed by the Canadian Education Centers Network and is targeted more globally. It includes direct links to Canadian institutions.

www.AUCC.ca is managed by the AUCC and targets both Canadian and international educators interested in broad information on Canadian education. It includes direct links to Canadian institutions.
Personnel
The academic relations director at the Canadian embassy is the only education official whose role is designated solely towards academic promotion within the United States.

Institutional visits
Given the proximity of Canadian institutions to the U.S. many of them are able to encourage and support visits by American educators. In particular institutions in the province of Nova Scotia have collaboratively pioneered and promoted "counselor days" which provide opportunities for U.S. college counselors to visit their campuses.

X. SELF PERCEIVED BARRIERS TO INCREASED AMERICAN STUDENT ENROLLMENT AND STRATEGIES FOR ELIMINATION

Admissions Criteria
Entry and graduation requirements for Canadian institutions have varied widely, including certain provinces which historically had a 13th year secondary requirement and 3 year higher ed requirement. This has been a disconnect for U.S. students. Strategies for Overcoming: Over time, the lack of consistency in admissions criteria has been shown to be counterproductive even within Canadian education. As a result, all but one province, Ontario, have phased out 3 year tertiary systems and Ontario is currently in the process of phasing it out.

In addition, as a reaction to their own mixed policies, Canadian institutions have begun to offer course credit to students who have successfully passed multiple Advanced Placement examinations. Because institutions have begun granting credit to Canadian students the policy is easily transferable to U.S. students. Canadian institutions have also developed a policy of requiring SAT’s from U.S. students which further reduces many of the discrepancies in admissions criteria.

Assessment
Many Canadian students have routinely taken U.S. based college entrance examinations such as the SAT and the Advanced Placement given their own interest in studying in the United States. Over the past several years Canadian admissions officers have begun to adopt these U.S. assessments as an entrance credential for Canadian students. This progression towards common assessment instruments has further integrated the two systems-giving students of both countries a common credential and increasing their range of institutional choices.

Capacity
Given the dearth of funding for education the ability of Canadian institutions to grow has been limited. Thus the number of degree seeking students, including Canadian students, which Canadian institutions can accept, is severely limited.

Housing
As in most educational systems housing is limited and most students live off campus after one year. This can be discouraging to American students who frequently expect housing and meal plans for the duration of their studies.

Language
Canada’s dual language policy is both an attraction and a barrier for U.S. students. Those who wish to study in French will find opportunities in Canada but are often more attracted to France.
Location
Canada’s close proximity to the U.S. provides an incentive for degree seeking students but a disincentive for American study abroad students who frequently seek more exotic locations.

Others
Canadian institutions have traditionally not informed students about admissions decisions until later than U.S. institutions. Thus many U.S. students were forced to commit to a U.S. institution as they were unclear of their status at the Canadian institution to which they had applied.

Strategies for Overcoming: Many Canadian institutions are working to move up their admissions reply dates to match or beat the U.S. date.

XI. SELF PERCEIVED STRENGTHS
For U.S. students the clear attraction of studying in Canada are lower cost, proximity, and relative safety. In addition, Canada allows foreign students to work while attending university under limited conditions.

The website www.studyinCanada.com also lists the following attractions:
- Ranked as #1 in the world as a place to live
- A high standard of living
- Beautiful Scenery
- High Tech
- Bilingual/multicultural

XII. INDIVIDUALS CONTRIBUTING TO THIS STUDY
Daniel Abele, Embassy of Canada, Washington, D.C.
George Ewonus, The College Board, Advanced Placement Program, Canada

XIII. PERCEPTIONS OF AMERICAN PROFESSIONALS (FROM SURVEY)
- A majority of respondents perceived that revenue enhancement was the primary motivation for Canadian recruitment efforts.
- A majority of respondents perceived that undergraduate students were the primary target audience.
- A majority of respondents perceived that cost and language were the primary attractions.
- There was no clear pattern of responses as to primary barriers to study in Canada. Other comments, however, included “not well known”.

19
<table>
<thead>
<tr>
<th><strong>FRANCE</strong></th>
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<tbody>
<tr>
<td><strong>I. CORE DATA</strong></td>
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<tr>
<td>U.S. Higher Education Enrollment in French Language 1995</td>
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<tr>
<td>Percent Change</td>
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<tr>
<td>U.S. Study Abroad Enrollments in France 1998-99</td>
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<tr>
<td>(Source: OPEN DOORS, Institute of International Education)</td>
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<tr>
<td>U.S. Study Abroad Enrollments in France 1999-00</td>
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<tr>
<td>Percentage Change</td>
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<tr>
<td>(Source: OPEN DOORS, Institute of International Education)</td>
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<tr>
<td>Number of American Fulbright Students and Scholars in France in 2000-2001:</td>
</tr>
<tr>
<td>20 students (2001)</td>
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<tr>
<td>(Source-Institute of International Education)</td>
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<tr>
<td>Chateaubriand Scholarships</td>
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<tr>
<td>Data on American Students in France</td>
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<tr>
<td>10,000 for North and South America)</td>
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<tr>
<td>10% graduates</td>
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<tr>
<td>83 % undergraduates</td>
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<tr>
<td>81% studying humanities</td>
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<tr>
<td>(Source: Embassy of France)</td>
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<tr>
<td>Average Annual Tuition French University</td>
</tr>
<tr>
<td>Estimated Monthly Budget for Living Costs</td>
</tr>
<tr>
<td>$600-$733 at (7.5 Fr)</td>
</tr>
</tbody>
</table>
II. OFFICES WITH RESPONSIBILITIES FOR PROMOTING FRENCH EDUCATION TO AMERICAN STUDENTS

EDUFRANCE
173, Boulevard St. Germain
75006, Paris
edufrance.com

Role
To promote France's international capacity to deliver scientific education and scientific expertise. To provide foreign students with comprehensive orientation and support services before and during their stay in France. To coordinate French bids to provide high-level educational consulting and planning services.

EMBASSY OF FRANCE
4101 Reservoir Road, NW
Washington, D.C.
Tel: (202) 944 6000

Role
- Supporting EDUFRANCE in the United States.
- Promoting teacher exchange and other exchange programs.
- Providing a liaison for American institutions.
- Overseeing the provision of accurate information on French education within the United States.

Cultural Services of the Embassy of France in the United States
Atlanta, Boston, Chicago, Houston, New Orleans, New York City, Los Angeles, Miami, San Francisco, Washington, D.C. (embassy)
www.frenchculture.org

Role
Providing an information resource for American students and educators on all aspects of French culture.

III. OTHER OFFICES/PROGRAMS WITH NATIONAL SUPPORT

CENTRE ENIC/NARIC
CENTRE D'INFORMATION SUR LA RECONNAISSANCE DES DIPLOMES ÉTRANGERS EN FRANCE
Ministère de l’éducation nationale, DRICB3
110 rue de Grenelle, F-75007 Paris
Tel:+33 1 55 55 04 28
Fax: +33 1 55 55 23 80
www.education.gouv.fr
Role
Promoting the mobility of students, teachers and researchers by providing authoritative advice and information concerning the academic recognition of diplomas and periods of study undertaken in other states

FULBRIGHT COMMISSION
Franco American Commission For Educational Exchange
9, rue Chardin
75016 PARIS
Tel. +33.1.44.14.53.60
www.fulbright-france.com

Role
Acting as an intermediary between French and American institutions of higher education. Providing grants to French and American students (graduate and postgraduate levels), young professionals, and scholars wishing to expand their educational experience.

French contribution $ 411,765 year 2000 (Source: U.S. Department of State)

do to Fulbright Commission

IV. HISTORICAL CONTEXT
Education has long been considered to be at the core of French cultural and linguistic traditions. For this reason, education has remained intricately tied with government and was for generations, essentially, exclusive. In the recent past, however, educational reforms were initiated which were designed to create greater access to higher education. France, with its long cultural and artistic history, is one of the original destinations of choice for American study abroad students and has helped shape the American study abroad experience.

The long history of education and cultural exchange with between U.S. and French institutions has been accomplished primarily through personal relationships and resulted in programs developed directly by individual institutions.

In recent years, however, aggressive recruiting by other countries has begun to carve into the core study abroad population which France has enjoyed. Given both the perception that its long held dominance as a destination of choice is eroding, and its movement towards expanding domestic educational access, the French government has concluded that it must be a national priority to promote French education culture, and scientific interchange globally. This has resulted in a national review of issues and barriers, and led to the formation of EDUFRANCE, the new organization charged with increasing student flows into France.

V. CORE GOALS FOR ATTRACTING AMERICAN STUDENTS
- Increasing understanding of French culture
- Increasing cooperation between universities and faculties
- Development of future business partnerships

VI. TARGET AMERICAN AUDIENCES
- Graduate and undergraduates are sought equally
- Study abroad students seeking direct access to a university
VII. CORE NATIONAL STRATEGY

This new national effort to recruit international students is focused broadly and not exclusively on American students. It has resulted in the creation of EDUFRANCE which is an effort supported collaboratively by both the French government and the university system. The objective for the creation of EDUFRANCE was to remove barriers to access to international students through centralizing the promotion and administration of students from other countries into the French university system.

VIII. ORGANIZATIONAL FACTORS IN CORE STRATEGY

Organization of Core Agency

EDUFRANCE is a non governmental agency funded jointly by the national government, institutional membership, and student fees. The board of directors represents both government and education interests. The president is elected by the board and the board asserts oversight over the hiring on an independent executive. French institutions are encouraged, but not required, to join EDUFRANCE. There is an institutional fee for joining. Institutions choosing not to join will not be represented by EDUFRANCE’s promotion and logistic efforts. Currently approximately 130 out of 450 French institutions have joined.

Education Sector Oversight/funding

Education representatives are named by the Conférence des présidents d'université (The association of university presidents), the Conférence des directeurs d'écoles et formations d'ingénieurs (CDEFI, the association of directors of technical schools), the Conférence des grandes écoles , (the association of schools of management and engineering), and the Fondation nationale pour l'enseignement de la gestion des entreprises (the national foundation for management education).

Government Oversight/funding

Core government agencies involved with EDUFRANCE are the Ministry of National Education, Research and Technology and the Ministry of Foreign Affairs.

Economic Model for Core Organization

Funding for EDUFRANCE is approximately 10 million Francs annually. (13 million dollars at 7.5 francs). There are three funding sources: the government of France, institutional memberships (French universities, American universities, and universities in other countries), and student fees.

IX. TARGETED EFFORTS OF CORE ORGANIZATION

Exhibits

EDUFRANCE holds education fairs worldwide. In the United States its core promotion function has been to create a large exhibit at the NAFSA conference.

Website

There are two key websites managed by French authorities through which American students can access general information on French universities. One is the website of the cultural services of the French embassy (www.frenchculture.org) and one is the website of EDUFRANCE (www.edufrance.com)

Personnel

There is no single individual assigned to the task of recruiting U.S. students. The educational attaché in the French embassy is assigned that task among broader duties.
The attaché is clearly charged, however, with supporting the efforts of EDUFRANCE as a whole within the U.S. About 30 staff are assigned to French cultural desks around the United States. They have education promotion and responding to student inquiries as part of their duties. An EDUFRANCE staff person is assigned to North America broadly, but his region includes Canada and the United States.

**Partnerships**

There is an overall strategy to actively pursue dual degree programs which allow students to spend a year in France and be awarded a degree by both the French and American institutions.

**X. SELF PERCEIVED BARRIERS TO INCREASED AMERICAN STUDENT ENROLLMENT AND STRATEGIES FOR ELIMINATION**

**Assessment**

There has not been an equitable entrance assessment to higher education for non French students.

Strategies for Overcoming: Credentialing authorities have advised French universities they should accept a combination of SAT’s and Advanced Placement (AP) scores.

**Language**

French is the language of instruction in French universities and enrollments are limited to those students able to academically participate in French.

**Housing**

A majority of French students live at home while attending university. While student housing exists, spaces are limited and are difficult to locate and negotiate. Based on this tradition there is a strong perception that the ability to locate affordable and acceptable housing is a key element in the ability to attract American students to study in France, and particularly in Paris.

Strategies for Overcoming: A government sponsored report initiated a push for the national government to intercede in the creation of acceptable housing options as one means of increasing student mobility, and particularly of increasing the attractiveness for American students.

**Logistics**

There is a strong perception that American students are less experienced than their European counterparts in living on their own and negotiating the complexities of everyday life. Given this, American students expect and require the intercession of an onsite expert to facilitate problem solving.

Strategies for Overcoming: A goal of EDUFRANCE is to provide a fee based service to facilitate the resolution of student placement.

**Costs**

Tuition in France is nearly nonexistent by American standards. There is a growing perception among French educators, however, that the availability of low cost educational options does not increase the attractiveness of French education to Americans and in fact may actually decrease its attractiveness. The reason cited is that many students, particularly Americans used to paying high tuition, believe that low cost education suggests low quality education.
Strategies for Overcoming: EDUFRANCE is stressing the fact that education is not free, but rather that the costs are subsidized by the French people. In addition, the rising costs of attracting and accommodating American students have led to a debate within France on the merits of creating a system which would allow and encourage French universities to set a fee for non EU students.

XI. PERCEIVED SUCCESSES OR FAILURES

EDUFRANCE is credited with reversing an overall decline in foreign student enrollments in French universities which has risen from 8.5% in 1997 to 10% in 2000-1. Within the United States there has been, however, a reluctance on the part of institutions to work with EDUFRANCE. The accepted explanation for this reluctance is that many American institutions have created personal relationships with French institutions which have long histories. Thus the American institutions remain unconvinced that turning to EDUFRANCE for resolution of common problems will increase service and reduce costs.

XII. INDIVIDUALS CONTRIBUTING TO THIS STUDY

Chantal Manes-Bonnisseau, Embassy of France

XIII. PERCEPTIONS OF AMERICAN PROFESSIONALS (FROM SURVEY)

- There was no clear pattern among the respondents as to French motivations for recruiting American students.
- A majority of respondents perceived the primary target audience for the French was study abroad students.
- A majority of respondents perceived environment and language were the primary attractions to France.
- A majority of respondents believed language and academic calendar were the primary barriers. Other comments noted “French attitudes” as a barrier.
## GERMANY

### I. CORE DATA

<table>
<thead>
<tr>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>U.S. higher education enrollment in German language 1995</td>
<td>96,263</td>
</tr>
<tr>
<td>U.S. higher education enrollment in German language 1998</td>
<td>89,020</td>
</tr>
<tr>
<td>U.S. Study abroad enrollments in Germany 1998-99</td>
<td>4,534</td>
</tr>
<tr>
<td>U.S. Study abroad enrollments in Germany 1999-00</td>
<td>4,744</td>
</tr>
<tr>
<td>Percentage Change: +4.6</td>
<td></td>
</tr>
<tr>
<td>Source OPEN DOORS, Institute of International Education, 2000</td>
<td></td>
</tr>
<tr>
<td>Number of Fulbright students, scholars, and teachers in Germany in 2000-1</td>
<td>Scholars 79 (2000)</td>
</tr>
<tr>
<td>Number of DAAD students, scholars, and teachers in Germany in 2001</td>
<td>Scholars 141 (2001)</td>
</tr>
<tr>
<td>Number of American students enrolled in universities and universities of applied sciences (Fachhochschulen) in Germany</td>
<td>3,467 (2000/2001)</td>
</tr>
<tr>
<td>Percent change (from 1999/2000 to 2000/2001) - 0.1 %</td>
<td></td>
</tr>
<tr>
<td>Source: Institute of International Education</td>
<td></td>
</tr>
<tr>
<td>Source: DAAD Annual Report 2001</td>
<td></td>
</tr>
<tr>
<td>Average Annual Tuition German Universities</td>
<td></td>
</tr>
<tr>
<td>With the impending amendment of the at Higher Education Act, institutions of higher education are allowed to charge tuition fees for graduate programs / a second academic degree (Master programs). Study programs leading to the first academic degree stay without tuition.</td>
<td></td>
</tr>
<tr>
<td>Estimated Monthly Budget For Living Costs</td>
<td>$600 US</td>
</tr>
<tr>
<td>Source: DAAD</td>
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</table>
II. OFFICES WITH RESPONSIBILITIES FOR COORDINATING PROMOTION OF EDUCATION IN GERMANY TO AMERICAN STUDENTS

DEUTSCHER AKADEMISCHER AUSTAUSCHDIENST –
GERMAN ACADEMIC EXCHANGE SERVICE
DAAD – Bonn
Kennedyallee 50
D-53175 Bonn
www.daad.de

Role
The Deutscher Akademischer Austauschdienst (DAAD) is an independent, publicly funded, self-governing organization of higher education institutions in Germany. DAAD promotes international academic relations and cooperation by offering mobility programs primarily for students and faculty, but also for administrators and others in the higher education realm. DAAD staff also share responsibility as Germany’s representatives to the ENIC/NARIC network with staff at the Kultusministerkonferenz (KMK).

DAAD U.S. OFFICE
German Academic Exchange Service (DAAD)
871 United Nations Plaza
New York, N.Y. 10017-1814
Tel: (212) 758-3223
www.daad.org

Role
The New York office, established in 1971, is a resource center for information on German universities, universities of applied sciences (Fachhochschulen), and colleges of fine arts, which also distributes publications on study, research and scholarship opportunities in Germany. DAAD NY is the contact for students and scholars in the United States and Canada who are interested in DAAD programs.

GERMAN AMERICAN FULBRIGHT COMMISSION
Fulbright-Kommission
Oranienburger Strasse 13-14
10178 Berlin
Tel: +49 30-284443-771
info@fulbright.de
www.fulbright.de

Role
Placing Fulbright Scholars at German Universities (and recruiting German scholars for American universities), Orientation, Housing, Administration

German contribution $3,518,510

GOETHE INSTITUT – INTER NATIONES
Goethe-Institut München
Sonnenstraße 25
D-80331 München
Tel: 49 (0) 89 / 551903-0
muenchen@goethe.de
www.goethe.de

U.S. offices in regional cities including Atlanta, Boston, Chicago, Los Angeles, New York, San Francisco, and Washington, D.C.

Role

- Goethe Institut - Inter Nationes supports the teaching of German language and culture worldwide.
- 128 cultural institutes in 76 countries, implements arts programs, runs language courses, offers support to teachers, universities, and local authorities instrumental in promoting the German language, and provides up-to-date information on Germany.

ALEXANDER VON HUMBOLDT FOUNDATION
Main office in Germany:
Alexander von Humboldt Foundation
Jean-Paul-St. 12
D-53173 Bonn
Tel (+49) 0228-833-0
www.avh.de

Alexander von Humboldt Association of America
US Liaison Office
1012, 14th Street NW
Washington, D.C. 20005
Tel: (+1-202) 7831907
Fax: (+1-202) 7831908
avhaha@bellatlantic.net
www.avhaha.org

Role
The Alexander von Humboldt Foundation is a non-profit foundation established by the Federal Republic of Germany for the promotion of international research cooperation. It enables highly qualified scholars not resident in Germany to spend extended periods of research in Germany and promotes the ensuing academic contacts.

The Alexander von Humboldt Association of America (AvHAA) is open to all who are or have been Humboldt Prize awardees, Humboldt Research fellows, German Chancellor scholars, Max Planck awardees and Feodor Lynen fellows of the Alexander von Humboldt Stiftung in the United States of America.

IV. Historical context
After two World Wars and the brutal intercourse with its intellectuals, international academic and cultural relations of Germany and its states became a important factor in building a new and different international reputation of the new republic. DAAD was re-founded in 1950, and together with other cultural institutions with an international reach, started to rebuild peaceful relationships with countries, mainly one who suffered through the regime and atrocities of the Nazis. With the Federal Republic of Germany integrated
in the western hemisphere and its strong economic relationships, international academic and cultural relations focused more on rebuilding relations with the western world.

“Mittlerorganisationen” – academic and cultural organizations like DAAD, Goethe-Institut and Alexander von Humboldt Foundation – take on an important role in building international relations by linking government and society in and outside Germany.

V. CORE GOALS FOR ATTRACTING AMERICAN STUDENTS

There is an overall strategy for German education to become more focused on global outreach. In the “Declaration of the Members of the Joint Initiative for the Promotion of Study, Research and Training in Germany” from June 22, 2001, members of this initiatives, including Federal and Laender departments as well as the most important research institutes and institutions of higher education in Germany, declared their support of internationality in education and research as an issues of high political priority. Germany must be attractive for the best brains worldwide, in public education and research institutions as well as in the companies research and development laboratories. Germany should also use the opportunity of securing its share in the international education market.

DAAD acknowledges that the American Study Abroad market is different to most other overseas student markets and the strategies needed to develop must be different and specially focused. Therefore DAAD New York develops linkages with institutions which will create pathways to allow American students who want to study in Germany to do so, to understand the needs and values of prospective American study abroad students and how to appeal to these values. DAAD introduced with the financial support of the European Recovery Program (ERP) a new program “edu.de” to increase the awareness of the German system of higher education in the US and to encourage US students to take advantage of the opportunities available in Germany.

VII. ORGANIZATIONAL FACTORS IN CORE STRATEGY

Organization of Core Agency

The DAAD’s full members are, on application, the higher education institutions represented in the Association of Universities and other Higher Education Institutions in Germany (HRK, Hochschulrektorenkonferenz) and their student bodies. At the end of 1999, DAAD membership comprised a total of 233 institutions and 128 student bodies from the various types of higher education institutions. Membership is not a necessary requirement for participation in DAAD programs, but does provide institutions with significant opportunities for influencing the management and constitution of the DAAD (election of advisory bodies, decision-making as defined in the statutes), as well as the essential principles underlying the structure of programs. At the same time, membership distinguishes the DAAD as a self-administrative organization of the academic community. This claim to academic self-administration is reflected in the internal structure of the organization, and especially in the proportion of academic representation found on the decision-making bodies.

In 1999 462 DAAD staff organize exchange programs for more than 60,000 scholarship holders. Of these, just under 26,000 are foreigners and just over 34,000 Germans (including EU scholarship holders). Women take a 44% share of scholarship holders across all DAAD programs. Some 500 DAAD Lektors are on teaching assignments around the world. The DAAD is represented abroad through its 13 regional offices. The DAAD takes on the important role of international higher education marketing and presents its information and advice at more than 40 trade fairs and exhibitions worldwide. The number of former Alumni Associations established by DAAD scholarship holders around the globe increases to 113.
In 2000 DAAD and HRK established a Marketing Consortium “GATE-Germany” to promote German universities and colleges professionally in the international market. GATE-Germany organizes promotion tours through countries around the world, organizes seminars and workshops, strengthen and expand the worldwide advice and information network for German universities. GATE-Germany’s funding sources came from the Minister for Education and Research.

In June 2001 the “Joint Initiative for the Promotion of Study, Research and Training in Germany” was constituted by 35 governmental and non governmental organizations. The goal is to provide information and to present Germany internationally as an attractive place for education, research and vocational training. The slogan “Hi Potentials! International careers made in Germany” invites talents from all over the world to come to German campuses in order to receive training for successful professional careers.

VIII. ECONOMIC MODEL FOR CORE STRATEGY

DAAD receives funds from various sponsors to cover its expenditure. In the recent two years the total budget experienced growth, among other as a result of new programs to support the internationalization of German universities. In 2000 these specialized programs cover expenditures about 57 Million Euro mostly funded by the German government with the majority coming from the Ministry of the Exterior and the Ministry of Education and Research. Other funding sources include the Ministry of Economic Cooperation, the European Recovery Program, German Federal Institutes. The total budget of DAAD is about 239 million Euro (in 2001).

GATE organizes and provides promotion tours and information about German universities; actions taken to support the establishment of new study programs abroad, to offer internships and to broaden the international network of information and advice offices around the world are funded with additional funds from the Minister for Education and Research as well as the Minister for the Exterior and the Ministry for Economics and Technology.

IX. TARGETED EFFORTS OF CORE STRATEGY

The DAAD sponsors a number of key programs designed to strengthen academic and cultural relations between the higher education communities of Germany and other countries. Among these are:
- International degree courses and programs
- Integrated studies abroad/educational partnerships outside the EU
- Double degree courses offered in cooperation with foreign partners
- International guest and visiting lectures
- Institutional partnerships in the field of German Studies
- Special guidance-counseling for international students, academics and scientists at German higher education institutions
- Follow-up contact works with international alumni
- Development and introduction of a German language proficiency test

Responding to the long history of close cooperation and friendship between Germany and North America, the DAAD New York has sponsored 7 Centers for German and European studies in the USA and Canada. These Centers emphasize collaboration in the humanities and social sciences in order to promote the academic study of Germany in a European context by way of an interdisciplinary approach. At the same time, they develop further the network of political, economic, and cultural ties between Europe and
North America. Each Center has its particular emphases and special projects. All of them, however, provide support for young academics, interdisciplinary teaching, comparative research projects, a forum for the discussion of contemporary German and European issues, encouragement to use the German language.

22 German professors are teaching at US and Canadian universities; 16 short-term lectures were funded by DAAD in 2001.

Beside a variety of scholarship programs for undergraduates, graduates, and scholars, DAAD New York started a new program “edu.de” in 2001. Funded by the European Recovery Program (ERP) through the Minister for Economics and Technology, the new program target US undergraduate students to study or do a internship for a time between 2 and 12 months (short- and long-term-scholarships) in Germany. “edu.de” includes educational tours of selected academic target groups such as administrators and engineering. The “edu.de-cooperation prize’ award excellent study abroad programs between US and German universities.

State based efforts to encourage student mobility were pioneered by the universities in Baden Wuerttemberg. The State of Baden-Wuerttemberg subsidizes the “Baden-Wuerttemberg Seminars” which were started by the BW universities in 1982.

Finally, Germany remains a strong supporter of bilateral exchange programs. The German government provides the largest single national contribution to Fulbright programming outside of the U.S itself. It also supports the Congress-Bundestag program focused on the exchange of high school students.

X. SELF PERCEIVED STRENGTHS

“Germany's higher education system is characterized by particular variety and versatility” (DAAD website)

Internationalization of higher education

In 2001, 187,000 international students studied at German institutions of higher education (10.4% of the whole student population). Since 1997 Germany ranks third–after the US and Great Britain – as a host country in international academic exchange. Germany has the most balanced relation between sending and hosting students and scholars among countries with a high engagement in international exchange.

Cost

German government subsidy of university tuition provides a low cost alternative for students from outside Germany seeking quality education

Curriculum

Germany has a long tradition of strength in advanced research, in scientific innovation, and has strong undergraduate research programs. Specific exchange programs, covering specialized scientific topics, help to attract foreign students to German universities. Since the mid 90s, the curriculum at German universities integrate more and more international components, such as double degree programs, international degree programs, and ERASMUS programs.

Environment

Germany’s position as a large economic power is an attraction to many students who wish to position themselves in global corporations. Politically Germany is attractive as the largest single member of the European Union and as a leader in the promotion of
European unity. It is also viewed as a bridge between Eastern and Western Europe and provides a gateway to both.

Language

German is spoken in a number of countries, including Austria and Switzerland as well as being a lingua franca in Eastern Europe.

Strong Academic Relations

A long history of exchange relationships between U.S. and German universities has provided the historical basis through which students and scholars have moved between the two countries. Germany has gone to great lengths in supporting this including providing a current list of exchange agreements between German universities and other universities worldwide.

XII. PERCEIVED BARRIERS TO INCREASED AMERICAN (AND INTERNATIONAL) STUDENT ENROLLMENT AND STRATEGIES FOR OVERCOMING

Cost

There is an interesting paradox to the issue of cost. German universities recognize that the tuition subsidy they enjoy from the German government, while creating low priced educational opportunities, actually creates barriers to the mobility of American students for two reasons. First, the lack of tuition often creates the false assumption that quality is lacking. Secondly, the lack of revenue prevents the universities from expanding services specifically aimed at enhancing opportunities for American or other international students.

Strategies for Overcoming: Some universities have developed specific courses at the graduate level for which there is a charge. There is also a small number of private universities or private annexes of public universities (very often highly specialized in economics or engineering), which charge for their courses, academic and social tutoring etc. German universities recently started to establish subsidiaries of German campuses abroad.

Language

German is not a popular language for Americans to study as there is a perception with many American study abroad professionals that German is limited in practical value either for business or research. German is perceived as being a “difficult” language. Although many German universities are developing coursework in English, many professors who teach in English are not sufficiently capable of lecturing in English to ensure a quality academic experience.

Strategies for Overcoming: DAAD has invested in German studies centers at major U.S. universities and fund conferences and special activities to promote German as a foreign language in the US and Canada.

Many German universities are developing coursework in English. However, few institutions have arranged for English based programs to be packaged in such a way as to make them useful for American study abroad students.

Housing

German universities and colleges do not generally have campuses with student halls of residence on site. This means students are personally responsible for finding somewhere to live. German universities normally provide dormitory housing for under 20% of their student body only.
Strategies for overcoming: In Germany, student services are provided by the Studentenwerke. These student affairs organizations are responsible for the economic and social guidance, counseling and care of all students. In order to provide a better idea of what the costs of studying in Germany are many Studentenwerk organizations have grouped their services together to create a Service Package for international students. This Service Package contains the essential services needed for everyday life. International students can choose to purchase such a Service Package which contains accommodation: a room in a hall of residence, guidance counseling, tutorial program and others.

**Academic Calendar**
At most universities and colleges, the annual calendar consists of two semesters: months: The instructional period of the winter semester extends from mid-October to mid-February and the summer semester from mid-April to late July.
This creates a significant barrier for American students who expect to end an academic year by late May and may prevent them from summer employment or other activities.
Strategies for overcoming: A few universities offer summer programs or “summer universities” for international students in German language, german culture and politics.

**Curriculum**
The 13th year, Abitur examination system as a university entrance credential presents a strong barrier to American students who might wish to consider an undergraduate degree in a German university. Some Länder tentatively introduced a 12 year school system.
Strategies for Overcoming: German universities have begun to recognize a set of American Advanced Placement (AP) examinations as a means of granting credits to American and other international students which can be considered as granting access to university level work.

**Credentials**
Germany has not yet overall adopted an academic credit system comparable to the United States. This creates difficulty in shaping credentials for returning American students which are both understandable and acceptable to U.S. institutions.
Strategies for Overcoming: Germany has increasingly begun to reshape its system to accommodate the parameters of the European Credit Transfer System (ECTS).

**DAAD Goals and Strategies**
The DAAD has created a comprehensive list of barriers and strategies for enhancing the attractiveness of German education within the global education marketplace. While these are not focused specifically at American students they are nevertheless instructional:
- introducing graduated degree courses for which internationally-compatible degrees are awarded (Bachelor's/Master's),
- introducing Diploma supplements which provide an English explanation of German degree titles,
- introducing a European Credit Transfer System (ECTS) and modular courses,
- incorporating obligatory foreign language modules (e.g. English for special purposes) into all degree courses,
- Internationalizing the content of curricula (especially in the form of a European dimension),
- promoting lectures and courses held in English,
- developing internationally-competitive, tuition-fee funded continuing education and training programs.
- creating stronger marketing of the research opportunities available at Germany's universities, such as the Graduate Colleges,
- establishing more inviting and hospitable legislative provisions for leading international experts and researchers, especially legislation governing the status of aliens and employment.
- continuing and extending the DAAD guest lecturer program.
- increasing the proportion of international faculty at the institutions.
- advocating change in the regulations concerning work permits for foreign students..
- creating a transparent, achievement-based and customer-friendly admissions system at Germany's higher education institutions, especially flexibility in the handling of application and registration/enrolment deadlines.
- transparent achievement criteria for admission to higher education (possibly using preliminary testing centers abroad).
- comprehensible and fair procedures for deciding on the recognition of study and examination achievements completed abroad within reasonable time periods (a maximum of three months), including the right of appeal
- abolishing the quota on foreign student admissions
- extending opportunities for learning Germany abroad, thereby making use of existing infrastructures and new media.
- implementing a German as a foreign language proficiency exam called Test für Deutsch als Fremdsprache (TESTDAF).
- extending opportunities for learning German in a study-integrated format at Germany's higher education institutions.
- changing laws concerning foreign student use of health system.

XIII. PERCEIVED SUCCESSES OR FAILURES

Although there is a great deal of cooperation between German and foreign universities, including the US, there are not many systematic strategies among German institutions to collaboratively recruit U.S. students. Still, there several initiatives exist which have an impact on promoting Germany as a destination for studying abroad and/or learning German as a foreign language. For example the International Engineering Program of the University of Rhode Island or institution-to-institution based programs such as the agreement between East Tennessee State University and the University of Rostock

XIV. PERCEPTIONS OF AMERICAN PROFESSIONALS (FROM SURVEY)
- There was no clear pattern among respondents as to the primary motivation for recruiting Americans into universities in Germany.
- A majority of respondents perceived that the primary target audience was study abroad students.
- Respondents were divided between environment, cost and language as the primary attractions.
- Language and academic calendar were considered the primary barriers. Respondents consistently noted the lack of attractiveness of German as a foreign language to Americans.
Other Comments
- The following are excerpted from the extensive comments of one American professional:

One gets the idea that the German authorities really have no particular strategy, and quite likely no special interest, in better efforts to attract US students or to change their traditional tendency to concentrate their limited efforts on "Ivy League" type US institutions and a few other places in the upper Midwest where large numbers of ethnic Germans settled and still predominate. It’s a classic European approach that dates from the 19th century. It’s also one of the reasons, among others, why German culture and language are so ill-served in the USA despite the huge number of German ancestry citizens and why so few US students and faculty look to Germany as a realistic option. The DAAD needs to recognize that America isn't Europe and that an ethnocentric and/or elitist approach to American marketing won't work well. There are hundreds of excellent institutions and thousands of potentially capable students whom the DAAD has never tried to reach, and never will if it thinks the Ivies, MIT, Cal, and Caltech are all there is to quality US education (aside from a few tribal descendents in Minnesota and neighboring states).

Connected to this is the evidence...that the Germans are beginning to acknowledge that the flaws in their system also contribute to its problems in attracting foreigners. I would summarize the German system's problems as: (1) an "if we build it, they will come" mindset, based on (2) an exaggerated view of their excellence derived from historical pride in the universities under the Kaisereich (a little while ago, unfortunately), and (3) a more subtly stated but important problem created by rigid regulations and structures (such as the FH/University divide) that limit flexibility and thus opportunity. Over this, from a US viewpoint, is the well-known German regulatory bias against private institutions and against American (and other foreign) degrees and diplomas. Germany is one of the few non-English speaking countries where Americans like to study and even live. This is made difficult by restrictions on immigration, getting one’s degrees recognized for admission, licensure, or employment, and the inferior caste put on our academics (private, lower level, poor quality, vocational, etc.) even if some recognition is granted. On top of this, which is hinted at in the comments about university funding, is the general absence of any services for students, advising systems, amenities, or an ethic of customer service. The student unions often provide the only semblance of services - it’s either that or to become utterly dependent on a professor, which creates a culture clash of another kind since Americans do not relate well to hierarchical and dictatorial social roles, even if these are benevolent. Also remember that only in Germany are the popular rankings of schools based on the campus ambiance, services, and access to facilities (read: crowding) rather than pure academic reputation. There is no comparison between the climate at a German university of 20-60 thousand students and a US university of like size except in a few cases.

...On a high policy level, I would say that the DAAD should seriously consider the potential for continued erosion of Transatlantic relations if important countries like Germany allow the sorts of barriers and problems you and they have identified to continue or even to grow. Sixty to one hundred years ago it was practical for Europeans to think US education and citizens were comparable to those from high-status third world societies like Argentina - great potential, impressive early results, but lacking critical elements. This is hardly a tenable posture today, but systems like Germany's still cling to it. Americans have a great respect for German education - more than most Germans realize thanks to there being no truly first-class
research/study on American education and domestic policy anywhere in Europe. Every American educator knows we modeled our university research structure on theirs and many remember that it was Germany that educated our first three generations of qualified academics after the Revolution, when we could not and the British and French wouldn’t. We are no longer a third world country education-wise, nor is Germany any longer alone at the top of study and research. It’s time to move on. Hopefully this will be done together.

A second concern noted was the perception that there is a risk inherent in the "internationally comparable degrees" being introduced post-Bologna. The same observer also noted:

while the new bachelors and masters may resolve an old barrier (no similar degree structure), the potential exists to have either a degree caste system emerge (international degrees versus national degrees), in which the bachelor/master strand is treated as inferior to the national strand; and/or a continued recognition problem in which the acceptance granted to holders of the international degrees (and like ones such as ours) slots them into lower level job classifications or bars them from public sector or publicly funded positions.

We [also] have to be sure that the ECTS, which Germany is now forced to adopt due to EU decisions and which will give them a credit system for the first time, is correctly correlated with U.S. credit hour calculations. The issue revolves around the EU requirement that a "Euro-Bachelors" degree contain no less than 180 ECTS credits and up to around 240. U.S. bachelor's degrees average 120 plus credit credits, and the ECTS requires 120 ECTS credits for a sub-degree diploma or certificate. If a one-to-one comparison were used in Europe, no U.S. undergraduate degree would be accepted as equivalent to a European bachelor's degree after Bologna, much less any other national first degree.

**NETHERLANDS**

I. **CORE DATA**

<table>
<thead>
<tr>
<th>U.S. Study Abroad Enrollments in the Netherlands 1998-99</th>
<th>1466</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Source OPEN DOORS, Institute of International Education)</td>
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<tr>
<th>U.S. Study Abroad Enrollments in the Netherlands 1999-00</th>
<th>1545</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percentage Change +5.4</td>
<td>(Source OPEN DOORS, Institute of International Education)</td>
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</table>

<table>
<thead>
<tr>
<th>Number of American Fulbright Students and Scholars in the Netherlands in 2000-2001</th>
<th>6 (2000)</th>
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<tr>
<td>Students-10 (2001)</td>
<td>(Source: Institute of International Education)</td>
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</table>

<table>
<thead>
<tr>
<th>Estimated Monthly Budget for Foreign Student Living Costs</th>
<th>$600-800 dollars monthly</th>
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<tbody>
<tr>
<td>(Source-www.studying.nl)</td>
<td></td>
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</tbody>
</table>

| Estimated Program Costs Students | Varies widely with program for Foreign but ranges from $700-$8000 |
II. OFFICES WITH RESPONSIBILITIES FOR COORDINATING PROMOTION OF EDUCATION IN THE NETHERLANDS TO AMERICAN STUDENTS

NETHERLANDS ORGANIZATION FOR INTERNATIONAL COOPERATION IN HIGHER EDUCATION (NUFFIC)
PO Box 29777
2502 LT The Hague
The Netherlands
Tel: + 31.70 4260 260
Fax: + 31.70 4260 399
www.nuffic.nl

Role
NUFFIC coordinates the information on all the international programs in Dutch universities and produces all generic promotion materials at the national level. It also works at the European level and is a leader in the international field of credential evaluation. In addition, the central office for the evaluation of all foreign academic credentials on behalf of Dutch universities is within NUFFIC.

The Dutch government has encouraged NUFFIC to recruit internationally, but the target countries are in Asia. Specifically, NUFFIC has established Netherlands Education Support Offices in Indonesia, Taiwan, and China.

NUFFIC’s only role with regards to American students is to coordinate a unified exhibit of Dutch universities at the annual NAFSA conference, maintain a website on studying in the Netherlands, and coordinating a publication mailing. Recently, however, it is also becoming an advocate for stronger promotion of Dutch education within the U.S. as the Dutch government has not yet seen that as a priority.

FULBRIGHT COMMISSION
The Netherlands-America Commission for Educational Exchange
Herengracht 430
1017 BZ Amsterdam, The Netherlands
Tel: 31-20-627-5421
Fax: 31-20-620-7269
nacee@nacee.nl
www.nacee.nl

Role
Promotion of exchange through the placement of Fulbright students and scholars at Dutch Universities (and recruiting Dutch scholars for American universities) orientation, housing, and administration.

Netherlands Contribution $ 340,000 (2000)
to Fulbright Commission (Source-U.S. Department of State)

IV. HISTORICAL CONTEXT
The Netherlands recognizes its status as a small country with an underutilized language. Its seafaring tradition has created a tradition of multilingualism and internationalism. This continues to dictate its education community’s self perspective as an integrating force—a multilingual meeting ground where people can network and meet to discuss common issues.
The Netherlands has been active to attract foreign students as of the early 50’s. First of all as a means of development cooperation, in order to make the Dutch knowledge about the tropics available to more people from those countries. This was the origin of Nuffic (1952), set up to organize such courses with Dutch universities and special institutions of higher education. Already at that time the international orientation of the Netherlands was an advantage. From the beginning, international students have not been required to learn Dutch.

A second wave of internationalization of Dutch (and European) higher education came in the 80’s with the intra European mobility programs of the European Union, like Erasmus, Socrates. The aim was that European students study in each others countries for at least half a year, in order to get to know each others (‘s countries) better: an important basis for European integration. Dutch students have been actively taking part in these programs, helped by having several languages at their command (basic training at secondary school in 3 foreign languages). In order to be able to receive foreign students, Dutch universities developed more courses in English.

The third wave came with the globalization in the 90’s. The international courses developed since the 50’s for developing countries gradually moved to a higher level, several of those countries being able to offer the lower level of higher education by themselves. Also the topics presented became more interesting for Newly Industrialized Countries and for experts and advisers from Western countries. The international courses developed for fellow Europeans became equally interesting for people from other parts of the world.” (Source-Corry Klugkist, NUFFIC)

V. CORE GOALS FOR ATTRACTING AMERICAN STUDENTS
International development and mutual cooperation

VI. TARGET AMERICAN AUDIENCES
- Study Abroad
- Graduate students
- Undergraduate students in economics, physical therapy, fine arts, and certain other fields

VII. CORE NATIONAL STRATEGY
There is a long history of exchange and study abroad with the United States, based on bilateral exchange agreements and some active study abroad programs, in particular with Leiden, Utrecht, Maastricht and Amsterdam Universities. The number of students in study abroad and summer programs is growing. Despite this, the government does not yet consider the U.S. as a core target for expanding student numbers. Therefore universities in the Netherlands recruit and admit American and international students independently. Hogescholen do not yet play an active role.

VIII. ORGANIZATIONAL FACTORS IN CORE STRATEGY
Organization of Core agency
NUFFIC coordinates the international activities in the field of higher education for the country and its institutions. It is partly subsidized by the Ministry of Education, but it is an independent organization. It has a board of supervisors made up of private sector experts.

Education Sector Oversight
NUFFIC has a variety of advisory boards from the higher education sector.
NUFFIC organizes a meeting of university internationalization staff every three months to review initiatives.

**Government Oversight**

The ministry of education and culture must approve board of supervisors but the appointments are pro forma based on a nomination process.

**Economic Model for Core Agency**

NUFFIC is jointly funded by the Dutch government, institutional contributions for specific activities and fees for services performed. The following were NUFFIC’s funding sources for FY 2000.

<table>
<thead>
<tr>
<th>Source</th>
<th>Funding Source</th>
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</thead>
<tbody>
<tr>
<td>Dutch Government</td>
<td>12,340,000 Euros (ca. 11,004,818 U.S.)</td>
</tr>
<tr>
<td>Other Revenue</td>
<td>5,311,000 Euros (ca. 4,736,352 U.S.)</td>
</tr>
</tbody>
</table>

(Source: NUFFIC Annual Report)

**IX. TARGETED EFFORTS OF CORE STRATEGY**

Overall, universities are conducting the primary recruitment efforts.

**Exhibits**

NUFFIC coordinates the annual exhibit of Dutch universities in the United States at NAFSA. Individual institutions are free to choose whether or not to participate through cost sharing.

**Mailing**

NUFFIC prepares and coordinates an annual mailing of information on Dutch higher education to U.S. institutions.

**Website**

NUFFIC maintains a website on study in the Netherlands at www.studying.nl. Individual institutions maintain their own websites and most of them are linked to Nuffic’s website.

**Personnel**

There is no individual within NUFFIC whose role is targeted towards U.S. student mobility except for the credential evaluation specialist for North America.

**Tours**

There are no promotional tours of the Netherlands for American educators.

**Institutional Visits**

Dutch institutions continue to independently pursue academic and exchange relations with selected U.S. institutions.

**Partnerships/Mutual Recognition**

Law programs are now recognized by the American Bar Association for students to get credit for partial study of international law. Similarly, there are mutual recognition arrangements between the U.S. and Dutch education communities in medicine and veterinary science.

**X. SELF PERCEIVED STRENGTHS**
Cost
Although Dutch universities have varying fees for Non EU students, they compare favorably to institutions in the U.K. and Australia. There is also the belief that American students targeting the Netherlands will choose to study there for the program and because of a cost comparison. NUFFIC has an agreement on behalf of higher education with an insurance company to provide reasonably priced medical coverage program for both Dutch and international students. Foreign students may work part time, but no more that 12 hours a week, when registered as foreign students.

Language
The Dutch are leaders in creating and promoting English language based tertiary curriculum. Moreover, many institutions are quite successful in creating a multi-lingual and multi-cultural study environment. To that end concepts of “internationalizing the curriculum and “internationalizing the classroom” have been worked out rather well.

Curriculum
Economics, law, social sciences, art and design, humanities and European studies are very attractive. There are also well developed fine arts and physical therapy reputations in the polytechnics.

Environment
The Netherlands is known as a liberal environment where students can research and debate diverse approaches to social and ethical questions such as gender roles, sexuality, drug policy, and suicide. The Hague and the International Court of Justice also serve as a magnet for individuals concerned with international law.

Logistics
The Netherlands is a cross roads. Its major airport is an international hub and all parts of the Netherlands are easy to reach by any form of transportation.

Quality
Education in the Netherlands has a long history and reputation for quality. Indeed, Dutch education researchers are often called upon to consult internationally on issues of quality. In addition, the Dutch have taken the lead in the internationalization of the institution and the curriculum.

XI. SELF PERCEIVED BARRIERS TO INCREASED AMERICAN STUDENT ENROLLMENT AND STRATEGIES FOR ELIMINATION
Costs
Although education is subsidized for Dutch and EU students, institutions may soon be required to charge cost covering fees to Non EU students. As a result the fee structure varies widely.

Language
Dutch educators are aware that few people outside the Netherlands speak Dutch. Within the United States there are core university programs which teach Dutch, but enrollments are limited.

Strategies for Overcoming: In line with its multilingual tradition, the Netherlands was the first continental European nation to incorporate a widespread English language curriculum into its higher education system. There are now more than 600 courses available in English throughout the Dutch system. The NUFFIC website offers an interactive database search of these programs.
Universities are also initiating a number of new degree programs in English. University College Utrecht is an initiative by the University of Utrecht to start a selective 3 years liberal arts bachelors program in English with a target of 50% international students, including U.S. students. The first group of bachelors has just graduated. The University of Maastricht is planning a similar program. The University of Amsterdam has started a three years bachelors program in English in economics. These undergraduate programs are all targeted to the U.S. as well as other international markets and are quite successful.

There is also movement towards increasing the number of graduate programs entirely in English. As part of a system wide reform there will be a bachelors/masters structure in the Netherlands in place in all higher education in 2003. Universities will have 3 years bachelors and 1 to 2 years masters programs, hogescholen will have 4 years bachelors and might also start one year masters. Many masters programs will be in English. There will also be an accreditation system set up to provide oversight over the degree programs taught in a non native language.

Data

It is difficult to aggregate data at the national level for exchange or non-degree students. As a result, the data on the number of American students is insufficient.

Strategies for Overcoming: Initiatives have been taken to improve this data collection issue.

Housing

Dutch universities have limited housing and external housing is not easy to find. They have no meal plans.

Strategies for Overcoming: Staff at Dutch universities have informally come to understand that international students should be awarded first priority in institutional housing. For meals, students are offered discounts at university subsidized restaurants and cafeterias.

Logistics

Staff at Dutch universities perceive that American undergraduates in particular have a high degree of expectation of service and support.

Strategies for Overcoming: Dutch universities have increasingly invested in creating and enlarging offices charged with student support.

Curriculum

Most universities require students to specialize, and this is not attractive to Americans.

Strategies for Overcoming: One strategy being pursued is allowing students to take courses within consortia of universities and polytechnics in order to allow them broader reach of both applied and academic courses. This can also be done within one university and some institutions have developed special multidisciplinary programs for this purpose.

Calendar

The calendar has not been an issue for American students. However, the adoption of a European calendar based on the Bologna declaration may require future semester students to stay beyond Christmas.

Strategies for Overcoming: Universities are exploring the creation of a special certificate of attendance for those students who may need to leave before the end of the semester.
Many institutions are also developing short term summer study abroad programs of 4-6 weeks.

Other Barriers
There is a self perception that Dutch leadership in the creation of English language based educational programs is not well known in the United States. In addition, the Hogescholen are not well known or accepted as overseas study sites.

XII. OTHER COMMENTS
Recently, the Dutch government has begun to discuss a cost retrieval model for higher education.

XIII. INDIVIDUALS CONTRIBUTING TO THIS STUDY
Marijk vanderWende, Center for Higher Education Policy Studies
Bernard Waechter, Academic Cooperation Association
Hans De Wit, University of Amsterdam
Corry Klugkist, NUFFIC

XIV. PERCEPTIONS OF AMERICAN PROFESSIONALS (FROM SURVEY)
- There was no clear pattern among respondents as to the primary motivation for recruiting Americans into universities in the Netherlands.
- A majority of respondents perceived that the primary target audience was study abroad students.
- A majority of respondents felt that cost and environment were the primary attractions.
- A majority of respondents felt that language was the primary barrier. Other barriers included “parents’ fears about drugs.”
NEW ZEALAND

I. CORE DATA
U.S. Study Abroad Enrollments in New Zealand 1998-99 803
(Source OPEN DOORS, Institute of International Education)

U.S. Study Abroad Enrollments in New Zealand 1999-00 799
Percentage Change -.5
(Source OPEN DOORS, Institute of International Education)

Number of American Fulbright Students and Scholars in New Zealand 6 Scholars (2000)
10 Students (2001)
(Source- Institute of International Education)

Number of Full Fee Paying American Students Enrolled in New Zealand Universities 1999- 286
2000- 393
(Source-New Zealand Ministry of Education)

Average Annual Tuition at New Zealand Universities $6560 U.S. 2001 (at .41)

Estimated Budget for Living Costs $4,100 U.S. per year.

II. OFFICES WITH RESPONSIBILITIES FOR COORDINATING PROMOTION OF EDUCATION IN NEW ZEALAND TO AMERICAN STUDENTS

EDUCATION NEW ZEALAND TRUST
Education New Zealand Trust
Level 4, 114 The Terrace
Wellington
New Zealand
enquiry@educationnz.org.nz
www.educationnz.org.nz
www.mynzed.com

Role
Education New Zealand Trust is a non-profit organization established in 1999 to facilitate the promotion of New Zealand as a study destination and assist institutions in showcasing their capabilities.

TRADE NEW ZEALAND
Trade New Zealand has U.S. offices in Los Angeles, New York, and Washington that assist with educational inquiries.
www.tradenz.govt.nz.

Role
Trade New Zealand is a government agency which provides leadership and support to enable New Zealand to be a real force in the global economy. It facilitates trade,
international investments, and the exchange of knowledge into New Zealand and out into the world. It partners with Education New Zealand

FULBRIGHT COMMISSION
Fulbright New Zealand
Level 8
Fulbright New Zealand House
120 Featherston Street
WELLINGTON
Tel: +64 4 472 2065
Fax: +64 4 499 5364
gen@fulbright.org.nz
www.fulbright.org.nz/

Role
To assist with the placement, orientation, housing, and administration of Fulbright Scholars at New Zealand Universities (and recruiting New Zealand scholars for American universities) and to provide ongoing support.

New Zealand contribution $146,667 (year 2000)
to Fulbright Commission (Source: U.S. Department of State)

NEW ZEALAND QUALIFICATIONS AUTHORITY (NZQA)
125 The Terrace
PO Box 160
Wellington
New Zealand
Tel: +64 4 802 3000
Fax: +64 4 802 3112
www.nzqa.govt.nz

Role
The New Zealand Qualifications Authority co-ordinates qualifications in secondary schools and in post-school education and training, maintains national standards, ensures recognition of overseas qualifications and administers national secondary and tertiary examinations.

III. HISTORICAL CONTEXT
New Zealand educators are aware that New Zealand is a small country of fewer than 4 million people and that as a consequence their participation on the global scene will be small. Educators believe, however, that they have a high quality service to offer and are a cost effective alternative to the traditional target countries for overseas study. They also see that they have a friendly dollar value against international currencies, especially the U.S. and UK, making them very cost effective and cost competitive.

New Zealand has some 50 years involvement in international education. Prior to 1990, however, all involvement was through aid programmes rather than trade. There are two main ways in which this involvement took place. The first is through the Colombo Plan, an agreement drawn up at the Commonwealth Conference on Foreign Affairs held in Colombo, Sri Lanka, in January 1950. The Colombo plan created a collective intergovernmental effort to support the economic and social development of member countries in the Asia-Pacific region. Among the strategies of the plan was to
facilitate education of students from developing countries through the provision of opportunities to enroll in institutions in key commonwealth countries. New Zealand was a founding member and from the 1950’s to the 1970’s, hosted a large number of students, in particular from Malaysia, Singapore, Thailand, India and South Korea. While Colombo Plan students are no longer coming to New Zealand, the government still commits a small amount annually to the maintenance of the Colombo Plan office. Many of the NZ Colombo Plan graduates hold senior positions in business and government all around Asia.

The second is through NZ government scholarships to international students for study in New Zealand. The scholarships are offered in developing countries with which NZ has bilateral arrangements. Some is through multilateral arrangements. Currently NZ expends about NZ$60 million dollars on education and training through its aid programme. Approximately 80% of this is focussed in the Pacific region as NZ sees a particular responsibility to provide assistance to its Pacific neighbours.

Prior to 1990, trade in education services was limited to a small number of private English language schools and private tertiary education providers. The public sector of education providers was not able to charge for services. In 1990, changes to legislation governing education were made, creating the possibility for the state sector to enrol full fee paying students. Public sector institutions were encouraged to seek international students by government. A number of benefits were seen, including:

- An opportunity to internationalise NZ campuses and curricula.
- The opportunity for young New Zealanders to mix with colleagues from a range of cultures.
- The chance to build on the experience of the Colombo Plan which had established a constituency of people around the world who knew and had a positive attitude towards New Zealand.
- Encouraging student and academic exchanges, joint research etc
- Enhancing NZ's position in the global community through the development of better understanding of New Zealand
- Long term economic benefits from the constituency above who will be the senior politicians and business people of tomorrow
- Short term economic benefit through foreign exchange earnings from fees and other expenditure (accommodation, food etc)

In sum, New Zealand’s international education efforts began as foreign aid but have now extended to trade in education services. Both are seen as important. International education is viewed as a two way process where both partners benefit. Because of this New Zealand is focusing on ensuring a quality provision, in both the academic programmes and the supporting services (pastoral care is the term in use).

IV. CORE GOALS FOR ATTRACTING AMERICAN STUDENTS
Increasing the number of short-stay students in the tertiary sector and the development of secondary programs will provide an initial focus for educational marketing efforts.

V. TARGET AMERICAN AUDIENCES
The main target groups for New Zealand institutions is the short term study abroad market that has increased U.S. numbers in recent years, and post graduate students.

VI. CORE NATIONAL STRATEGY
Trade New Zealand, Tourism New Zealand, and Education New Zealand have formed the New Zealand International Education Marketing Network (NZIEMN). NZIEMN is
responsible for the development and implementation of the new brand utilized in promoting New Zealand’s international education. The “New World Class. Educated in New Zealand” brand is being implemented in promotional campaigns, as part of public exhibitions, and in the development of international channels and networks.

New Zealand is developing itself as a premier education destination with leading institutions and courses within an environment ideal for learning. Although institutions market themselves independently, the industry is developing a core strategy and message to promote New Zealand.

While New Zealand universities have been developing links and networks with American institutions, there has not been a high level of marketing directed at students. It is important that American students are shown the spectrum of high quality specialist courses that are available at New Zealand tertiary institutions.

Looking to develop the source markets that New Zealand institutions draw students from, Trade New Zealand and Education New Zealand have established the USA as a Market Focus Group. New Zealand’s profile is actively being raised both by Tourism New Zealand and Trade New Zealand.

VII. ORGANIZATIONAL FACTORS IN CORE STRATEGY
Organization of Core Agencies
Education New Zealand represents eight sectors of the education industry in New Zealand and is funded by participating institutions. There are over 280 subscribing institutions, which include:
- Public universities, polytechnics/institutes of technology, colleges of education (specialist teacher education institutions), secondary schools
- Private institutions: English language providers, tertiary institutions, vocational training providers and secondary schools.

Education New Zealand and Trade New Zealand have committed to jointly develop strategic plans for the marketing of New Zealand education internationally. This strategy maximizes the impact of national promotion undertaken in key markets.

Education Sector Oversight/funding
Education New Zealand and Trade New Zealand have developed a cohesive marketing facilitation plan for education exporters. This plan undertakes to strategically assist New Zealand education marketing in key and developing source markets.

This plan is supported by multiple NZ institutions buying into events so that the industry can have a greater profile than individual institutions acting alone. The cost of these programs depends on the market and the level of industry support. All marketing events are on a user pays basis by participating institutions.

Government Oversight/funding
Through the NZIEMN the New Zealand government has contributed NZ$3.8 million over four years to assist with the generic promotion of the education industry. This financial backing is for a limited period only and there is no reliance on continued government support.

VIII. TARGETED EFFORTS OF CORE STRATEGY
New Zealand marketing efforts include exhibiting and profiling NZ institutions at fairs such as ALPHE and NAFSA, as well as encouraging the development of networks through direct mailing and institution to institution linkages. Trade New Zealand has undertaken the on-going role of researching and developing relationships with U.S. institutions, agents, and study abroad advisors.
It is vital that access to student channels is developed to encourage a greater number of American students to come to NZ.

Website
- www.mynzed.com
The development of an all-encompassing website has been a major marketing goal of the NZIEMN. The website is comprehensive listing a wide range of NZ educational providers and courses on offer. This site contains a user-friendly database that enables students to target their searches with a variety of variables taken into account. Trade New Zealand also provides student information on its site.

Personnel
Education New Zealand, Trade New Zealand, and institutions directly provide advice on studying in New Zealand.
Tours: Education New Zealand and Trade New Zealand run a series of media and agent visits from targeted markets.

Partnerships
New Zealand institutions form independent networks and exchanges with their American counterparts.

IX. SELF PERCEIVED STRENGTHS
(From mynzed.com)
- Association with fresh thinkers
- World leading courses and degrees
- British based education system
- World class institutions
- Warm and welcoming environment
- High quality living conditions
- Recreation in paradise

X. SELF PERCEIVED BARRIERS TO INCREASED AMERICAN STUDENT ENROLLMENT AND STRATEGIES FOR ELIMINATION
One of the largest barriers NZ faces is its low profile and lack of differentiation with Australia within the U.S. Overcoming this perception requires a greater presence in the U.S. and the development of a unique NZ identity in the minds of American students.

Language
As English is the language of instruction in NZ educational institutions, U.S. students have little difficulty meeting NZ standards. This, however, could be a disadvantage for those students who want to study a foreign language.

Housing
All NZ universities offer housing or accommodation options to overseas students. The majority of NZ students move into shared rental accommodation after their first year of study. American students, generally, have higher expectations regarding housing and general amenities than domestic students. U.S. students often arrive in NZ poorly equipped for the difference in seasons.
Strategies for Overcoming: New Zealand authorities attempt to create transparency for students in informing students of what will be provided. They believe that it is crucial to get the issue of accommodation right. It is not necessarily a case of providing luxurious
accommodation. It is rather a case of ensuring the students have realistic expectations of what is provided.

Logistics
American students tend to have different needs than those of other, mainly Asian, international students. U.S. students tend to place higher demands on academic staff than is usual, potentially causing some problems regarding the expectations of service from the teaching staff.

It can be frustrating for U.S. students that various support services are targeted towards overseas students from different backgrounds.

Quality
The differing teaching styles and expectations of students can cause some difficulties for American students studying at NZ tertiary institutions. There are, however, few problems with the quality of NZ institutions or courses when compared to those in the U.S..

Clearly, this is important, although the fact that all New Zealand universities are state funded means that there are very few obstacles to overcome in terms of the study abroad market. Most colleges or consortia looking for partners in NZ will be well informed about the quality of tertiary education in this country.

It is, however, more of an issue when full-degree programmes are offered to U.S. students. American students doing a degree in New Zealand would most likely be interested in very specific programmes, that may be difficult to find in the U.S., or ones where a NZ perspective is relevant, such as studies in indigenous cultures, post-colonialism etc. The majority of American students are very conscious of university rankings as graduating from the "right" universities in the States can really determine future job prospects. NZ has difficulties as a destination from that point of view. This is an obstacle for dramatic growth in the "full-degree" market.

Strategies for Overcoming: NZ and USA universities create memorandum of understanding which provides a framework for students studying in NZ for one or two semesters to have the NZ study credited to the USA qualification.

Calendar
This is not really an issue now that NZ universities teach on a semester basis.

Credential
This is an issue in the undergraduate degree market. Most Americans doing an undergraduate degree would not consider a university outside the U.S. system as this can jeopardise their chances of getting into a good graduate school.

New Zealand is more likely to be a postgraduate market for specialist courses. Undergraduate professional degrees are typically not recognized in the U.S.

Also, three-year undergraduate degrees are not accepted as sufficient for admission to American graduate school - so any American doing an undergraduate degree in NZ would need to complete an honours or conjoint degree.

XI. INDIVIDUALS CONTRIBUTING TO THIS STUDY
Miett Fear, Trade New Zealand
Matt Huntington, Fulbright New Zealand
Elizabeth Macleay, Fulbright Visiting Professor
Graeme Sommerville-Ryan Education New Zealand
Lindsay Spedding University of Auckland
XII. PERCEPTIONS OF AMERICAN PROFESSIONALS (FROM SURVEY)
-A majority of respondents perceived that business and revenue enhancement was the primary motivation for recruiting Americans into universities in New Zealand.
-A majority of respondents perceived that the primary target audience was study abroad students.
-A majority of respondents perceived that environment and language were the primary attractions.
- There was no clear perception among respondents of primary barriers to study in New Zealand except for the overall sense that New Zealand educational opportunities are “not well known.”
UNITED KINGDOM

I. CORE DATA

U.S. Study Abroad Enrollments in the United Kingdom 1998-99 27,720
(Source: OPEN DOORS, Institute of International Education)

U.S. Study Abroad Enrollments in the United Kingdom 1999-2000 29,289
Percentage Change 5.7
(Source: OPEN DOORS, Institute of International Education)

Number of U.S. Fulbright Students and Scholars in the United Kingdom 2000-2001
Students 22 (2001)
Scholars 11 (2000)
(Source: Institute of International Education)

Number of American Students Enrolled in Universities in the United Kingdom
11,553 U.S. students on undergraduate/postgraduate programs in the UK
29.5% increase between 1995 and 2000
(Source: The British Council)

Average Annual Tuition at UK Universities
Undergraduate arts: $7975 - $10,994
Undergraduate/graduate science $8500-$13,370
Graduate arts degree: $8250-$11,000
Clinical medicine $20,000-$25,000
MBA $9,000-$23,000
(Source: http://www.britishcouncil.org/education)

Estimated Monthly Budget For Living Costs
$10-13,000 per year for London,
Oxford and Cambridge and $8500-11,400 per year for the rest of the UK
(Source: http://www.britishcouncil-usa.org/education)

II. OFFICES WITH RESPONSIBILITIES FOR COORDINATING PROMOTION OF EDUCATION IN THE UNITED KINGDOM TO AMERICAN STUDENTS

THE BRITISH COUNCIL
Cultural Department
The British Embassy
3100 Massachusetts Ave, NW
Washington, D.C. 20008-3600
Tel. 202 588 7849
www.britishcouncil-usa.org

Roles
In the United States, the British Council's office in Washington DC facilitates policy and best practice exchange in education and the arts between the U.S. and the UK. It focuses on actively promoting UK education and training. It also administers a range of
scholarship and exchange programs enabling U.S. and UK policy makers to share education policy experience.

III. OTHER OFFICES/PROGRAMS WITH NATIONAL SUPPORT

ENIC/NARIC
UK National Academic Recognition Centre
ECCTIS 2000 Ltd, Oriel House Ltd, Oriel Road, GB-Cheltenham GL50 1XP
Tel: +44 1242 252 627
Fax: +44 1242 258 617
www.naric.org.uk

Role
Promoting the mobility of students, teachers and researchers by providing authoritative advice and information concerning the academic recognition of diplomas and periods of study undertaken in other countries.

THE FULBRIGHT COMMISSION
United States - United Kingdom Educational Commission
Fulbright House
62 Doughty Street
London
WC1N 2JZ
Tel: 020 404 6880
education@fulbright.co.uk
www.fulbright.co.uk

Role
Placing Fulbright scholars at UK universities (and recruiting UK scholars for American universities), orientation, housing, and administration.

United Kingdom Contribution $721,780 (year 2000)
to Fulbright Commission (Source, U.S. Department of State)

MARSHALL SCHOLARSHIPS
Role
The Scholarships were instituted by the British Parliament on 31 July 1953 as a practical and enduring gesture of thanks on behalf of the British people for assistance received from the United States in the aftermath of the Second World War. They are funded by the Diplomatic Wing of the British Foreign and Commonwealth Office. The Scholarships are named after General George C Marshall, President Truman's 'Architect of Peace', whose personal support made the European Recovery Program (Marshall Plan) possible and whose name has been associated with it ever since. The Scholarships program has grown over the years from 12 awards in 1953 to up to 40 fully funded new awards a year today. Since its inception over a thousand Marshall Scholarships have been awarded to students at more than 250 U.S. universities and colleges.

A Marshall Scholarship may be held at any one of more than a hundred universities and university-type institutions in Britain. Marshall Scholars are expected to stay in residence at their British university for two years and to take a degree. In a limited number of cases a Marshall Scholarship may be extended for a third year. The
management of the scheme rests with a Commission, appointed by the Secretary of State for Foreign and Commonwealth Affairs, which is responsible through him to Parliament.

The administration of the program is carried out by a secretariat based at the Association of Commonwealth Universities in London. The British Council coordinates the administration of the program in the USA on behalf of the British Embassy.

IV. HISTORICAL CONTEXT
During the period Margaret Thatcher was prime minister of the UK in the mid 1980’s there was a strong movement to de-emphasize central government support for higher education. Institutions were encouraged to raise their fees and to attract additional fee paying students from the outside to enhance revenue. The UK has maintained this fee structure and international recruitment strategies have evolved over time into systematic, coordinated efforts on the part of the British Council to promote UK education broadly.

In 1999 Prime Minister Blair went to China & Hong Kong where he met prominent people educated in the UK and the USA. This led him to newly recognize the strategic importance of attracting international students and scholars into Britain. As a result he personally launched a new initiative to revitalize international student recruitment efforts.

V. CORE GOALS FOR ATTRACTING AMERICAN STUDENTS
Current Efforts
The ‘Prime Ministers Initiative’ (PMI) is concerned with building long-term and sustainable relations between the UK and overseas countries through education and training, it prioritizes:
- Engaging the interests of international students.
- Encouraging more to seek access to UK education and training programs.
- Providing them with a rewarding education and training experience of the UK
- Maintaining contact with them as they move through their career.

For UK institutions
- To develop an international reputation and internationalism within institutions
- To enhance standards within the institutions through the contribution of U.S. - students
- To encourage diversity within institutions
- Revenue enhancement

VI. TARGET AMERICAN AUDIENCES
- Study Abroad
- Graduate
- Undergraduate

VII. CORE NATIONAL STRATEGY
Collaborative promotion through a core agency enhanced by individual institutional efforts.

VIII. ORGANIZATIONAL FACTORS IN CORE STRATEGY
The British Council is a public/ private partnership managed and funded collaboratively by the British government and the higher education community. There is no requirement mandating that universities participate in the British Council recruitment strategy but all institutions do so. Feedback on strategies is gained through the Vice Chancellors Committee and an annual general meeting of members.
Economic Model For Core Agency
The British Council budget worldwide is 600-700 million U.S. dollars annually. There are 7000 staff in 250 offices in 110 countries. The U.S. office has 17 staff members.

Funding sources for the British Council
- Approximately one third government grants.
- One third business revenue such as English teaching and test management.
- One third managing contracts on behalf of government and aid agencies.

The Educational Counseling Service of the British Council is directly responsible for the recruitment of international students into British Universities. The ECS is a generic marketing club of universities, further education colleges and independent schools, funded partially by the British Council and partially by subscriptions of member institutions. The fee is a sliding scale based on the size and type of institution and ranges from $4000 to $20,000 annually depending on the institutional size and sector. There are no fees for providing information to students. There are small student fees (to cover direct costs only e.g. postage) in some countries for enhanced services such as directly managing an application.

IV. TARGETED EFFORTS OF CORE STRATEGY*
Prime Minister’s Blair initiative set a goal of recruiting 50,000 additional international students in higher education and 25,000 in further education by 2005 from all world areas.

The initiative identified four key barriers to greater inflow of international students. These were:
- Visas
- Bureaucratic work regulations
- Lack of scholarships
- Need to improve marketing

As a result of this initiative the government moved to implement the following strategies:
- Improvements to visa processes to benefit bona fide students.
- Removal of barriers to issuing work permits to foreign students.
- The enhancement of a scholarship scheme with a target of 500 extra places which would be co-funded by government with universities and sponsors.
- The development of a branding & marketing strategy designed to:
  - simplify student choice
  - communicate effectively
  - appeal to students’ aspirations
  - establish a clear identity for UK education
  provide umbrella for UK institutions to market themselves more effectively.

To accomplish this the government invested $8 million dollars spread over 3 years and divided among 8 government departments. The effort led to a marketing campaign spearheaded by the British Council with the following elements:
- Visual identity through a clear logo and images.
- Core messages such as affordability, welcoming, diversity.
- Coherence in communication channels and marketing activity.
- An emphasis on affordability through the development of scholarships, a focus on the ability to work and cost comparisons.
- Coordinated activities such as advising, exhibitions, outreach, PR, website, promotional materials, working with partner organizations.
Exhibits/Conferences
The British Council coordinates a multi-institutional exhibit annually at the NAFSA conference. It also exhibits as the British Council at other U.S. conferences such as the National Association of College Admissions Counselors (NACAC)

Website
There is a comprehensive website containing information on studying in the UK at www.studyintheUK.org

Tours
There are no funded tours of UK institutions for Americans as it is perceived that American personnel frequently visit UK institutions on their own.

Publications
The British Council prepares publications on facets of studying in the UK which are distributed to institutions and students.

X. SELF PERCEIVED BARRIERS TO INCREASED AMERICAN STUDENT ENROLLMENT AND STRATEGIES FOR ELIMINATION

Cost
UK universities are marginally more expensive than Australian universities and the cost of in-state tuition for American public universities.

Strategies for overcoming: UK educational experts have concluded they do not wish to compete globally on the basis of cost. They believe strongly in the quality appeal of their institutions. Specific initiatives which have been put in place, however, are:

- Students can obtain an undergraduate degree in three years (except Scotland – which has a four-year system, though students with successful Advanced Placement exams may get advanced credit); a masters in one year; and a PhD in three years.
- The UK provides national health insurance coverage for students remaining over six months.
- A regulatory change supporting the right of international students to work was pursued aggressively by Prime Minister Blair in response to a perception that it would help increase enrollments. Currently, therefore, international students – irrespective of their length of program – are eligible to work for the duration of their program (part-time – 20 hours per week) during term-time and full-time during vacation.
- There are several major scholarship programs for U.S. students to the UK including; the Marshall Scholarship (40 two-year 15,000 pound scholarships funded by the national government); Rhodes Scholarship (32 two-year scholarships covering all education, maintenance, and travel costs, funded by a trust fund); Gates/Cambridge Scholarship (up to 50 scholarships annually funded by a private fund set up by Bill Gates)). Additionally, many UK institutions are offering scholarships – some specifically for U.S. students.
- U.S. students can use U.S. government guaranteed Stafford loans to cover the cost of undergraduate, graduate and study abroad at many institutions in the UK.
- Finally, substantial discounts are offered to students in the UK (and Europe) for various activities including travel, entertainment, book/CD/other purchases, banking etc.

**Language**

Students seeking to immerse themselves in a non English language are not attracted to the UK. The UK makes no attempts to attract American students there for language study.

**Calendar/Credential**

Scottish universities operate under a four year calendar while British and Welsh universities operate under a three year calendar. This makes Scottish universities more compatible with the American system than British institutions.

In addition many UK universities have first semester programs which extend into February making it inconvenient for American students who only wish to remain for one semester.

Strategies for Overcoming: UK institutions have recently begun to accept Advanced Placement awards and International Baccalaureate certificates for admission into their universities. In addition they are now setting score ranges for SAT and ACT scores from American students.

UK universities are being encouraged to introduce a transcript with consistent information content by academic year 2001/2002, but the use of such a transcript would not be expected until 2002/2003. This stems from the recommendation of the Dearing report (1997) that institutions should develop:

- a transcript recording student achievement which should follow a common format devised by institutions collectively through their representative bodies;
- a means by which students can monitor, build and reflect upon their personal development through Personal Development Plans.

For students forced to leave early due to differing calendars some institutions will arrange for students to take their examinations early or will provide early assessment for those students who are unable to remain for the complete semester

**XI. SELF PERCEIVED STRENGTHS** (Adapted from Website www.studyintheUK.org)

**Quality**

UK education enjoys a reputation for unsurpassed quality throughout the world. This means students can look forward to better career prospects and higher potential earnings once their studies are complete. With a history dating back almost 800 years, the British way of learning has inspired education systems the world over and is still among the most valued and successful.

The UK operates a unique quality assurance system that ensures accountability in all areas. From student support services to the quality of the teaching staff, every school, further education and higher education establishment is subject to rigorous scrutiny by government. This system allows students to compare the choice of courses on offer on a like-for-like basis, secure in the knowledge that each one has been assessed according to the same demanding criteria.
Other Comments
Recent studies by the British Council and independent agency J. W. Thompson perceptions showed the UK was perceived by students to be on a par with U.S. institutions in terms of quality.

Teaching and Learning
Text from the website includes the following language:
- "UK education has always placed great importance on the ability of students to work independently and to develop their own thinking."
- "Learning in the UK isn't a one-way process in which you simply receive information from your teachers. Instead, you'll be encouraged to read widely, to research thoroughly and to question what you learn at every opportunity."
- "Classes and lectures are often supplemented by small, informal group tutorials in which you will be free to exchange ideas and opinions with your teachers. A process which, in turn, stimulates new ideas and new avenues for discussion."
- "The result is that you emerge from a UK education not only with a thorough understanding of your subject but also with analytical abilities and problem-solving skills that are much prized by employers in later life."

Diversity/Range of Programs
- Over 180 degree granting institutions
- Over 500 colleges of further education
  There is also a wide range of institutions from small colleges to large urban universities. Many universities have self-contained campuses, others are based in city centers.

Housing
For at least the first year at a UK institution, overseas students are generally guaranteed accommodation. This would usually be in a dorm or shared flat (apartment) on or close to campus. Many study abroad programs also guarantee accommodation.

Logistics
Flights between the U.S. and UK are very reasonable and numerous. The UK also often acts as the gateway to the rest of Europe for U.S. students.
Travel is easy (with integrated rail, bus, and flight network) within the UK and because of its size, no single location is difficult to reach. It is also easy (and relatively cheap) for students in the UK to travel around the rest of Europe.

Student Support
All UK universities will provide student support (academic, housing, general counseling, and activity programs) with advisors and activities for international students. In addition, the Students' Union also provides support for students (housing, travel, student clubs, and general counseling).

XII. SELF PERCEIVED SUCCESSES OR FAILURES IN RECRUITMENT STRATEGIES
There is a very strong perception that the coordination of marketing efforts through the British Council, and the new branding scheme, have accomplished the following:
- Significantly increased the global visibility of higher education in the UK, particularly in English speaking commonwealth countries.
- Reduced individual costs of recruitment through providing a collaborative approach.
- Assured the promotion of carefully considered, key messages.

In addition British Council representatives feel that the American proposal to charge a fee for student visas will provide the UK with a competitive advantage for non American students.

XIII. INDIVIDUALS CONTRIBUTING TO THIS STUDY
Jennifer Scott, British Council USA
Douglas Thompson, U.S. representative, University of Aberdeen

XIV. PERCEPTIONS OF AMERICAN PROFESSIONALS (FROM SURVEY)
- A majority of respondents perceived that revenue enhancement was the primary motivation for recruiting American students
- A majority of respondents perceived that the primary target audience was study abroad.
- A majority of respondents perceived language and academic quality were the primary attractions.
- A majority of respondents perceived cost and academic calendar were the primary barriers. Other comments included “bad press-such as mad cow disease”.

SURVEY QUESTIONNAIRE FOR AMERICAN PROFESSIONALS

Thank you for agreeing to participate in a study sponsored by DAAD profiling efforts by the education sectors of key countries interested in recruiting U.S. students.

Please complete by November 26 and return to John Deupree, DAAD consultant for this study, by email at jdeupree@att.net, by fax at 301 871 2179, or by mail to:

John Deupree
3002 Regina Drive
Silver Spring, MD 20906

NAME   (Optional)

____________________________

Institution

____________________________

Position

____________________________

Years in International Education

THANK YOUR FOR YOUR PARTICIPATION!
Please mark the column indicating which ONE of the three listed possible motivations for recruiting students you think BEST represents EACH of the given countries (if none, list an alternative).

<table>
<thead>
<tr>
<th>Country</th>
<th>Mutual Understanding/Public Diplomacy</th>
<th>Business/Revenue Enhancement</th>
<th>International Development</th>
<th>Other (Please List)</th>
<th>Unsure</th>
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Please mark the column you feel best represents the PRIMARY U.S. target audience for recruitment efforts for each country listed (if none, list an alternative).

<table>
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<tr>
<th>Country</th>
<th>Graduate Students</th>
<th>Undergraduate Degree Seeking</th>
<th>Study Abroad/Short Term</th>
<th>Other (Please List)</th>
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For the countries listed below, which of the following do you think are the two primary attractions for American students? (Please rank by indicating 1 and 2 under appropriate column, one being highest)

<table>
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<th>Cost</th>
<th>Environment</th>
<th>Language</th>
<th>Quality of Academics</th>
<th>Range of Program Options</th>
<th>Other (Please List)</th>
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For the countries listed below, which of the following do you think are the two primary barriers for American students? (Please rank by indicating 1 and 2 under appropriate column, one being highest)

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<th>Environment</th>
<th>Language</th>
<th>Quality of Academics</th>
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Please rank the following general strategies for recruiting U.S. students in order of your perception of their effectiveness by marking 1, 2, 3 etc. (one being highest) next to the listed strategy.

Rank Assigned

Funded tours for education professionals

Direct contact by a national/group office to a U.S. institution

Development of trust and rapport between an individual institution in a given country and a U.S. institution

Exhibits (NAFSA, etc.) or college/study abroad fairs

Faculty contacts

Scholarships

Mail campaign to students

Mail campaign to selected professionals

Advertisements in education media

Other (Please List)
Please indicate in a short paragraph any strong indications of success or failure to recruit U.S. students of which you are aware for any of the countries listed above.

Please share any additional comments or observations about the subject of this study.
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