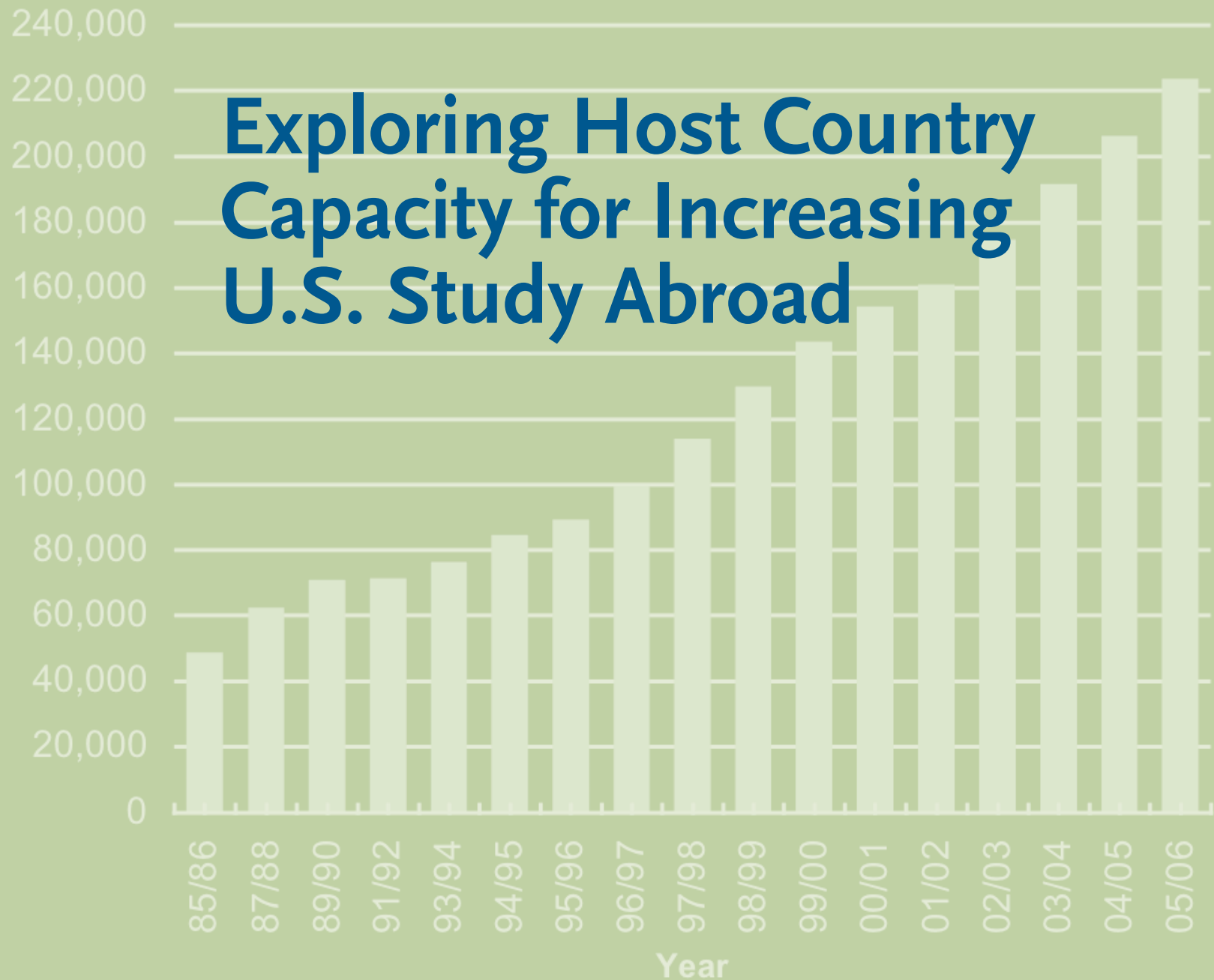


MEETING AMERICA'S GLOBAL EDUCATION CHALLENGE

Exploring Host Country Capacity for Increasing U.S. Study Abroad



Institute of International Education

An independent 501(c)(3) nonprofit founded in 1919, IIE is among the world's largest and most experienced international education and training organizations.

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Exploring Host Country Capacity for Increasing U.S. Study Abroad

Second in a Series of White Papers on
Expanding Capacity and Diversity in Study Abroad

Institute of International Education
May 2008

By Robert Gutierrez, Rajika Bhandari and Daniel Obst

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Executive Summary

According to the Institute of International Education's most recent data, over 223,000 U.S. students annually study abroad for academic credit, and there are widespread calls to double, triple or even quadruple that number in the coming decade, sending students to more diverse destinations around the globe. Where would another 300,000-700,000 Americans go to study abroad? Which university systems, especially in the non-traditional destinations, have the capacity to absorb large increases when countries like India, China, Egypt, Turkey and Brazil are struggling to accommodate the demand for higher education by their own citizens? To begin addressing these important questions, the Institute of International Education launched *Meeting America's Global Education Challenge*, a focused policy research initiative which explores from multiple perspectives the challenge of substantially expanding the numbers and destinations of U.S. students studying overseas. In May 2007, IIE published its first White Paper in this series, *Current Trends in U.S. Study Abroad & the Impact of Strategic Diversity Initiatives*.

In this second White Paper in IIE's study abroad capacity research series, we focus our research on: the efforts by higher education institutions in host countries abroad to receive and absorb a significantly larger number of U.S. students; the challenges they face; and their motivations and strategic plans to undertake this effort. An online survey conducted between September and December 2007 of over 500 higher education institutions located in different world regions produced the following key findings:

- The greatest room to absorb more international students (including U.S. students) appears to be in longer-term study abroad programs that last either a full academic year or at least one academic session, and in degree study. Yet this presents a potential supply-demand conflict, as most U.S. students tend to study abroad for shorter duration.
- Exchange agreements and joint- and dual-degree programs are also large areas of growth. The presence of U.S. students is seen as a catalyst for forming reciprocal and beneficial partnerships with U.S. higher education institutions, and for raising the international profile of the host institution.
- For many overseas institutions, increasing international enrollments is a central aspect of an overall internationalization mission. This attempt to increase enrollments is often focused on specific sending countries, with the U.S. appearing as the top choice, followed by China, India, Canada, and Russia.
- Hosting U.S. students often provides an academic incentive to receiving institutions by enabling them to increase their global competitiveness and expand their joint research opportunities with U.S. sending institutions.
- Although language continues to be a barrier, both in terms of the foreign language deficiencies of U.S. students and the shortage of courses offered in English in countries where English is not the primary language, there are also clear indications that this gap is being bridged. An increasing number of overseas institutions are now offering courses taught in English, in a wide range of academic fields, while other research has shown that more U.S. students are studying foreign languages.
- From the perspective of overseas institutions, the main steps that could be taken at the U.S. end that would significantly increase the numbers of U.S. students abroad would be: a) increasing host institutions' stature and visibility in the U.S.; and b) making available more funding and scholarships to enable a larger group of students to go abroad.

I. Introduction

A. Overview of Study Abroad and Issues of Increasing Capacity

How to increase the number of U.S. students studying abroad is an issue that has been receiving considerable attention within the U.S. academic community and among policy makers responding, in part, to the recommendations and goals of the Lincoln Commission. The Commission's goals, which were presented to the higher education community in 2005, included setting the target of annually sending one million U.S. students overseas by 2017.¹ Even before the Commission issued its report, many U.S. campuses had adopted their own ambitious goals of dramatically expanding their study abroad programs, diversifying the destinations, and making them accessible to a wider cross-section of their student body. Federal initiatives such as the Fulbright U.S. Student Program, the Benjamin A. Gilman International Scholarship Program, the David L. Boren Scholarships and Fellowships, and the Language Flagship Fellowships have expanded the resources available and encouraged students of diverse background and with financial need to undertake study in areas of the world not previously on their radar screens.

As U.S. campuses seek to make study abroad more widely available, many challenges are being intensely discussed at the campus level, and by policy makers at every level, but often with only limited data on which to frame the discussion. Wider national and media attention to the study abroad field has created windows of opportunity for highlighting best practices and more importantly, creating a heightened public appreciation of the importance of study abroad, especially for a wider and more diverse population of American students. To begin addressing the national challenge of increasing and diversifying U.S. study abroad, the Institute launched *Meeting America's Global Education Challenge*, a focused policy research initiative which, through survey research, data and policy analysis, and dialogue with key stakeholders, explores from multiple perspectives the challenges and opportunities of sending more U.S. students overseas.

In May 2007, IIE published its first White Paper in this series, *Current Trends in U.S. Study Abroad & the Impact of Strategic Diversity Initiatives*. The White Paper assessed current trends in study abroad in the United States, providing a benchmark for future expansion. It included an analysis of existing strategic funding initiatives such as the Gilman, Boren and Freeman-ASIA Scholarships, showing how resource allocation can influence the ethnic diversity of participants, geographic destinations, fields of study and length of study. In addition, the paper also highlighted institutions that have created specific program models that better facilitate a more diverse group of students participating in study abroad.²

B. The Need to Expand Capacity at the Host Country Level

According to IIE's *Open Doors Report on International Educational Exchange*, 223,534 U.S. students studied abroad for academic credit in 2005/06.³ This number has grown at the rate of approximately 8 to 10 percent over the past five years. If this rate of growth continues over the next decade, approximately 550,000 U.S. students would be studying abroad in 2017. With wider financial support at the national, state, and campus levels, the numbers could grow even more dramatically, given the strong interest in studying abroad expressed by 55 percent of incoming freshmen, according to a recent study by the American Council on Education.⁴ Such a substantial increase in study abroad participation will require dramatically expanded capacity not just within the U.S. institutions that send students

overseas, but equally at the institutions in other countries that will host the students. Therefore, the issue of increased capacity is one of both demand and supply and whether one exceeds the other.

For this second White Paper in IIE's study abroad capacity research series, we focused our research on the supply side of the equation: the question of whether higher education institutions in host countries abroad can absorb a significantly larger number of U.S. students, and whether there exists a strong motivation and intent on their part to host more Americans. The "capacity" to host more U.S. students was defined broadly to include not just physical capacity and infrastructure (e.g., classroom and dormitory space) in host institutions, but also other, equally important, aspects of institutional capacity such as the availability of courses taught in English; availability of programs of varying and suitable duration; and existing challenges and effective strategies associated with hosting more U.S. students.

C. Methodology

With the goal of examining capacity at the host country level, IIE developed and administered a snapshot survey to explore key issues for non-U.S. institutions in expanding their host opportunities for international students in general and U.S. students in particular. Key topics covered by the survey included:

- International and U.S. student enrollment patterns at the host institution
- Motivations and drivers for increasing U.S. student enrollment in host institutions
- Outreach and marketing to U.S. students
- Challenges and barriers to expanding host institution capacity
- Strategies to increase growth

Designed by IIE and reviewed by an external group of advisors in the U.S. and overseas, the survey was administered online between September and December 2007. Survey respondents ranged from managers and directors of study abroad offices, to deans and vice-presidents of international offices to registrars. Reaching out through IIE's 20 worldwide offices and close partnerships with many international and national academic exchange organizations through *Project Atlas*,⁵ IIE distributed the survey to institutions in target countries in the European Union (EU), Oceania (Australia and New Zealand), Mexico, Canada, and several other regions.⁶

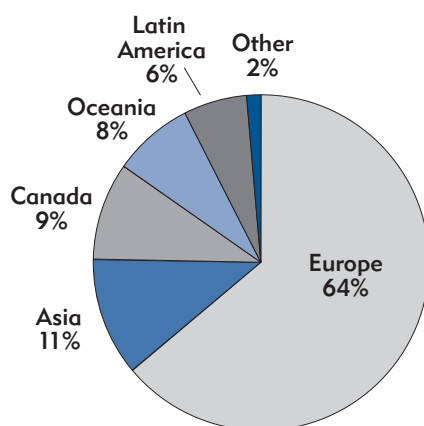
The sections that follow summarize key quantitative findings from the survey, and offer a broader look at the contextual and qualitative issues for expanding U.S. study abroad capacity at institutions abroad. While the majority of findings are presented for all countries as a single group, results for specific world regions and countries are discussed where they serve to highlight or illustrate a particular finding or strategy. IIE plans to publish separate country profiles with findings related to several of the key responding countries.⁷ Through this initiative as well as other IIE research projects, we also hope to in the future explore the capacity of non-traditional destinations such as India, Brazil, China, and Egypt to host more U.S. study abroad students.

II. Respondent Demographics

A. Responses by Country and World Region

Overall, 533 institutions responded to the survey, of which 64 percent were located in European countries (both EU and non-EU members) (Figure 1). Western European countries with the largest number of responding institutions included Germany, the UK, France, Finland, and Poland. Institutions from Australia, New Zealand, and Canada also participated in high numbers. The high response rates from these countries are likely a result of particularly extensive outreach to institutions by our international partner organizations.

Figure 1: Percent of Responding Institutions, by World Region



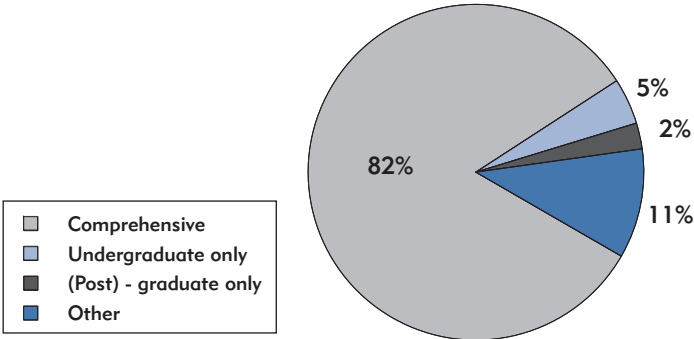
Although the number of responding institutions was substantial, especially for a new survey of this scope, the findings should not be interpreted as being representative of all higher education institutions in a particular country or world region. Rather, the survey provides a critical snapshot of and key insights into the types of issues and challenges at institutions overseas that U.S. colleges and universities are likely to encounter as they attempt to send more of their students abroad. For host institutions seeking to increase their capacity to host international students, the findings provide important information on the types of internationalization strategies adopted by institutions in other host countries, and the challenges they seek to address.

B. Sector and Classification of Responding Institutions

The majority of responding institutions (79 percent) reported that they were public institutions, while the remaining were private. Although not a focus of this survey, the degree to which public institutions in Europe and elsewhere are committed to diversifying their student population with more international students has strong implications on the financing (public or private) of higher education in many parts of the world. Governments and their ministries of education will no doubt have to balance international enrollment targets with the ever-expanding demand for seats from their own domestic students, while sufficiently meeting capacity for both groups of students.

The type of institution and the degrees awarded did not vary much among survey respondents: 82 percent described themselves as “comprehensive” institutions (i.e., those offering degrees up to the doctoral level); 11 percent classified themselves as “other”, which included vocational and specialized/professional schools; and relatively few (less than 5 percent) were solely undergraduate or post-graduate level institutions (Figure 2).

Figure 2: Institutional Classification



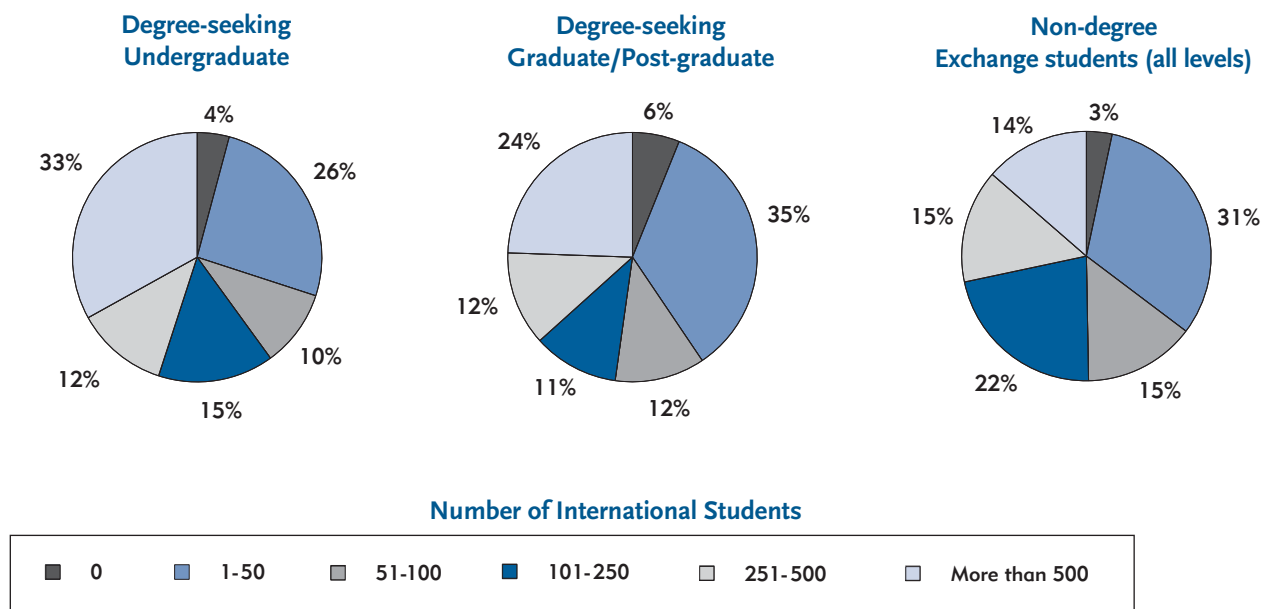
III. International Student Enrollment at Host Institutions Abroad

Responding institutions were first surveyed about all international enrollments at their institution and were then asked specific questions pertaining to U.S. student enrollment. Three broad categories were defined for an international student in this portion of the survey: undergraduate, graduate/post-graduate, and non-degree exchange students. The first two categories include those students directly enrolled in the institution. The third category, non-degree exchange, includes students (at any academic level) that participate in a study abroad program for a set period of time at a host institution but who are not receiving degrees from the host institution.

A. Total International Student and U.S. Student Enrollment

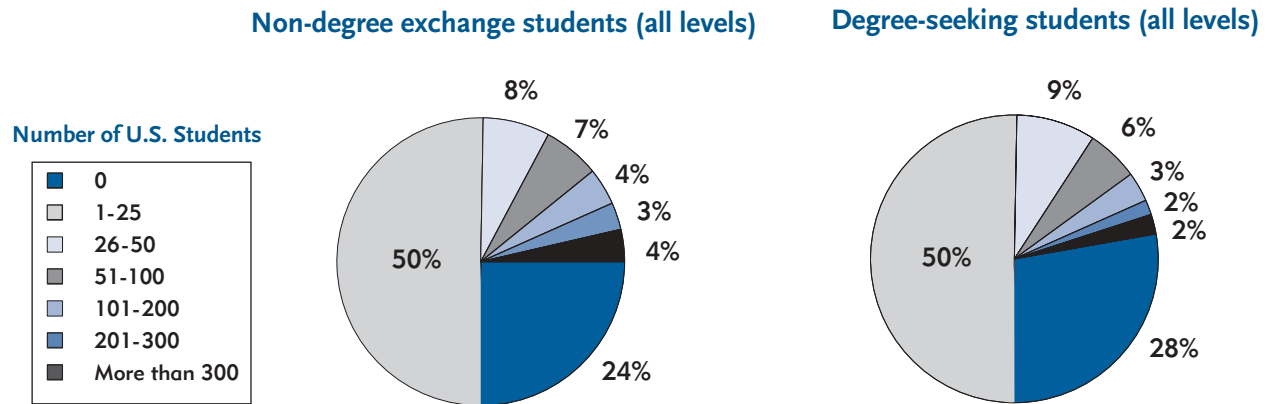
Figure 3 presents the number of international students enrolled in responding institutions for the 2006-2007 year.⁸ This survey represents a broad range of host institutions, with the majority of respondents either hosting more than 500 or less than 50 international students. For example, at the undergraduate level, about a third of institutions enroll over 500 international students, while at the graduate/post-graduate level more institutions (35 percent) are likely to enroll students in the 1-50 range. Another way of looking at these findings is that the largest international enrollment at most institutions (33 percent) was at the undergraduate level, followed by the graduate level (24 percent), and non-degree study (14 percent).

Figure 3: Percent of Institutions Reporting International Student Enrollment at their Institution, by Level of Study



When asked a similar question about the enrollment of U.S. students (as opposed to all international students), approximately half of the respondents reported hosting 25 or fewer U.S. students for degree or non-degree study, while about one quarter reported hosting no U.S. students regardless of the academic level (Figure 4). Only about one quarter of the responding institutions indicated hosting more than 25 U.S. students either in degree or non-degree study.

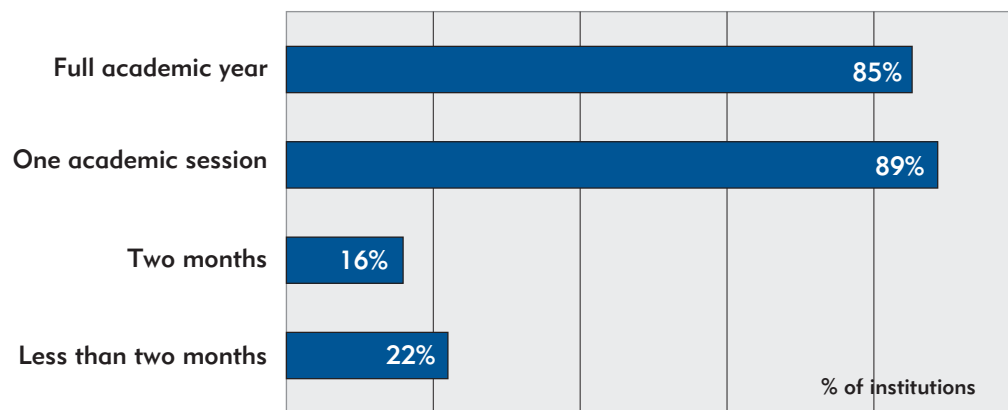
Figure 4: Percent of Institutions Reporting U.S. Student Enrollment at their Institution, by Type of Study



B. Durations of Study at Host Institutions

The vast majority of responding host campuses offer longer-term programs for their non-degree seeking international students: approximately 85 percent of all responding institutions reported that they offer programs lasting a full academic year and 89 percent offered programs for at least one academic session (e.g., a quarter, semester, or term) to international non-degree exchange students (Figure 5). Only about 38 percent of the responding institutions offer programs of two months or shorter duration, a category of study abroad duration often described as “short-term.”

Figure 5: Duration of Non-Degree Programs Offered by Host Institutions



These findings suggest a potential supply-demand conflict: while the majority of overseas institutions indicate that they offer mid-term and long-term programs for non-degree students, most U.S. students tend to study abroad for shorter duration. According to IIE's most recent *Open Doors Report*, 53 percent of U.S. students participate in short-term study abroad sojourns, which include summer, January term, or any program of eight weeks or less during the school year.⁹ This number has risen sharply over the past few years. The "semester-abroad" model now attracts 37 percent of those studying abroad, and only 6 percent spend a full academic or calendar year abroad.

While some large overseas institutions with substantial capacity may have the requisite academic and support services to host U.S. students for shorter periods of time, the majority may find this to be a challenge. The case of Finland, which has a number of mid- and long-term study abroad opportunities available in English for international students, is particularly illustrative: 97 percent (34) of all Finnish institutions identified long-term study as the number one potential area for growth, compared to only 14 percent who reported non-degree study as an area for growth.

It appears from survey responses that the desire and capacity to expand short-term programs may be quite limited in some countries by overriding national-level internationalization policies to attract full-degree international students or those enrolled in longer-term programs. Institutions not represented in this survey may face similar challenges in meeting the U.S. demand for short-term programs, not out of a reluctance to accommodate such programs, but often because of higher-level policies that might provide incentives and funding for programs of longer duration. With the majority of survey respondents in Europe, the Erasmus/Socrates exchange model seems to prevail, which favors long-term exchanges as institutions have built up the capacity for these exchanges over the past 15 years and may have focused less on hosting students on short-term exchanges. Developing short-term programs for U.S. students may also meet some resistance from overseas partner institutions who worry that the quality of their academic programs may be affected. On the other hand, the findings reveal a potential market opportunity for institutions that wish to attract more U.S. students by developing customized summer programs or other high impact shorter-term programs.

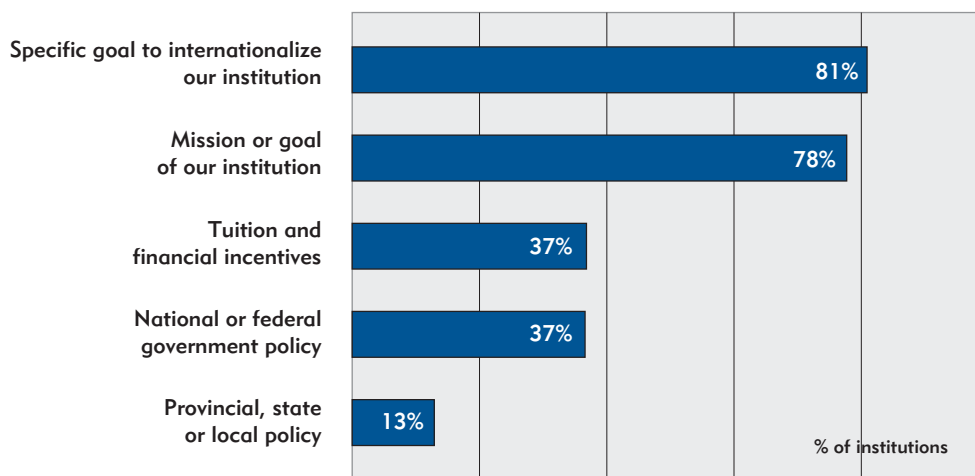
IV. Motivations and Targets for Growth

A key goal of this survey was to assess host institutions' plans to increase international student enrollment (and U.S. student enrollment in particular), and to identify factors or incentives that might drive this type of growth. Virtually all institutions surveyed (98 percent) responded that they had plans to increase their international student enrollments. Among this large group, more than two-thirds (68 percent) had set specific targets for increasing international enrollment at their institution; these targets for annual growth typically ranged between 10 to 20 percent for most institutions.

A. Key Factors Driving Increases in International Enrollment

A number of interrelated factors are likely to motivate overseas institutions to increase their international enrollments, including but not limited to: student demand, faculty interest, internationalization goals at individual institutions, and cost to both the student and institution. This section of the survey explored some of these factors, among others. In particular, an overwhelming majority of respondents reported that the institution's specific goal to internationalize (cited by 81 percent) as well as the overall mission of the institution (cited by 78 percent) were major factors in increasing international student enrollment at the institution (Figure 6).

Figure 6: Motivating Factors to Increase International Enrollments



Only 37 percent of responding institutions indicated that revenue earned through tuition and other financial incentives was a motivating factor. However, as can be expected, this is not a significant incentive for institutions in countries where tuition is waived for international students, or where institutions are largely publicly-funded and offer substantial subsidies to all students.

Just over a third of the institutions (37 percent) reported that national or federal government policies play a role in their motivation to attract more international students and to increase capacity. The major types of policies and strategies reported by institutions are summarized in the sidebar on the following page. In Australia, for example, institutions reported that the federal government has supported a policy of internationalization of higher education with a US\$1.3 billion scholarship initiative to attract and enroll international students.¹⁰ Institutions recognized this commitment from the

government to promote their universities abroad. Some Australian institutions noted a shortage of federal support and direct funding in the past and suggested that these new targeted funding initiatives might help to not only recoup lost revenue, but might also help broaden the international student profile at many of Australia's institutions.

These anecdotal examples point to the potential role of government policies in expanding or restricting the internationalization of higher education. Just as several institutions reported a strong governmental incentive for enrolling international students, many institutions reported that there was, in fact, no government policy on internationalization and that the government's immigration and visa-related policies can often hinder internationalization.

B. Growth Areas for International Students

The factors described above generally suggest *why* institutions are diversifying their student population to include more international students. The degree to which national policies or institutional goals might play a part in an institution's efforts to expand its host capacity does not necessarily predict growth in the various forms or mechanisms through which international educational exchange is most likely to take place. To explore realistic perceptions of growth and the best pathways through which expanded capacity in international enrollments can be achieved on host campuses, respondents were asked about five areas—exchange agreements, tuition swap, degree study, non-degree study and joint degree programs—and were also invited to provide information on other pathways in which they saw a potential for growth. Underlying this survey question is also the critical issue of whether U.S. institutions would identify and prioritize similar areas of growth for sending their students overseas, a subject that is not within the scope of the current paper, but one that we plan to explore through future research.

The largest area of growth identified was that of *exchange agreements*, with 81 percent of institutions reporting that this was an area in which their campuses could increase international enrollments (Figure 7). Close to three-fourths of all institutions considered *degree study*, that is, enrollment leading to a degree from the host institution, as the second largest potential growth area for international student enrollment. What this suggests is that the recruitment efforts of overseas institutions—especially those in

Governmental policies & strategies that have motivated survey respondents to increase international enrollments:

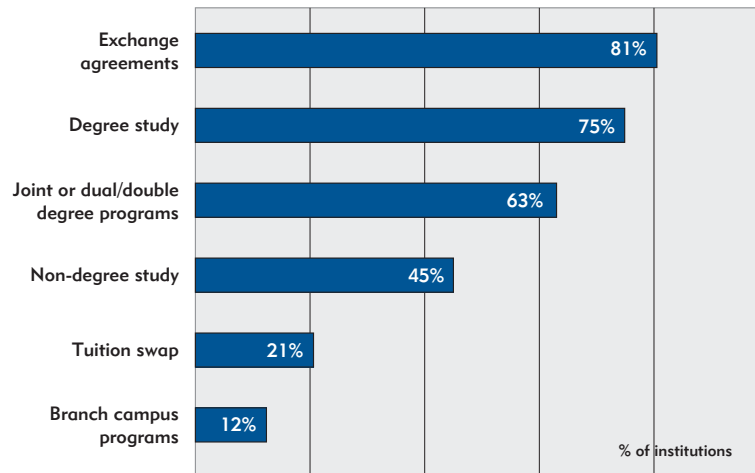
- Government-sponsored marketing and promotion at the national, state, and local level
- Local, state, and federal government-sponsored scholarships for international students
- Implementing activities related to the Bologna Process (for European institutions)
- Allowing international students to extend their visas to stay and work in the country (e.g., in New Zealand, Australia and Canada)
- Promotion of English as a second language in order to attract native English-speaking students (in countries where English is not the primary language).

Several survey respondents also indicated other motivating factors, including:

- Attracting international students to make up for declining domestic student enrollments
- Improving globally-oriented programs and courses of study
- Enhancing research competitiveness and collaborations
- Positioning the institution as an internationally respected global institution

Europe—are heavily focused on attracting full-degree students. A growing number of U.S. students considering study abroad may in the future also consider full degrees earned abroad, responding to vigorous efforts of institutions to attract them, and the financial incentive to earn a degree abroad (where cost may be considerably less).

Figure 7: Growth Areas for International Enrollment



A large proportion of institutions (63 percent) also mentioned dual and joint-degree programs as an area that could potentially attract more international students. These types of programs have been encouraged significantly by the Erasmus Mundus initiatives, and hence are particularly widespread in Europe. Among other potential areas for growth cited in response to open-ended questions were: providing more host-country language courses; offering short-term and/or summer programs; implementing or expanding marketing efforts; and offering more graduate programs as well as post-graduate/research opportunities designed to attract and retain international students beyond their initial course of study.

C. Eyes on the Horizon: Target Countries

When asked if they seek to enroll international students from particular countries, almost 60 percent of responding institutions said they focused on specific countries for meeting their recruitment targets. Figure 8 lists the top twenty target countries for international student recruitment among all responding institutions. The United States appears as the top choice, followed by China, India, Canada, and Russia. While this ranking reflects the most sought-after students overall, it varies somewhat when responses are disaggregated at the country or regional level. Figure 8A illustrates the example of how four countries—Australia, Finland, Germany, and Russia—compare to the consolidated list in terms of which countries they target for international student recruitment.

Figure 8: Top 20 Target Countries for International Student Recruitment

1	United States	11	Japan
2	China	12	Brazil
3	India	13	Mexico
4	Canada	14	Malaysia
5	Russia	15	Vietnam
6	Germany	16	Ukraine
7	United Kingdom	17	Spain
8	South Korea	18	Indonesia
9	Australia	19	Turkey
10	France	20	Poland

Figure 8A: Top 5 Target Countries for International Student Recruitment, for Selected Host Countries

<u>AUSTRALIA</u>	<u>FINLAND</u>	<u>GERMANY</u>	<u>RUSSIA</u>
1 China	1 China	1 United States	1 China
2 India	2 Russia	2 China	1 United States
3 United States	3 United States	3 Russia	2 Germany
4 Malaysia	4 Germany	4 Australia	3 Kazakhstan
5 Germany	5 India	4 Canada	4 Mongolia

In addition to the top targeted countries listed above, responding institutions also mentioned other world regions from which they were attempting to recruit international students. These included (in descending order of priority): Latin America; the Middle East; Europe; North America; East Asia; Southeast Asia; Eastern & Central Europe (as regions of focus within Europe); and South Asia.

V. Attracting More U.S. Students

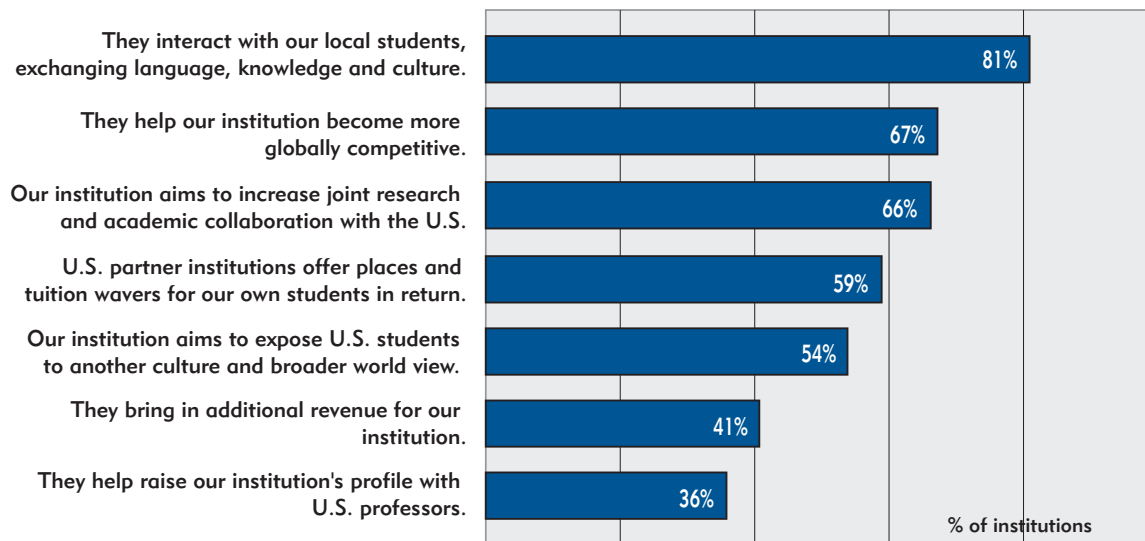
Virtually all institutions (99 percent) expressed interest in attracting more U.S. students to their programs. From an international education policy and academic perspective, this is good news: an expansion of U.S. students at non-U.S. campuses might help create and expand international academic discourse; lead to a deeper understanding of other cultures through educational exchange; and help institutions overseas and in the U.S. build and strengthen their mutually-beneficial academic and research partnerships.

A. Why Do Overseas Institutions Want More U.S. Students?

When asked why they wanted to attract more U.S. students, 81 percent of responding institutions reported that exchange of knowledge, culture, and language through personal interaction between

U.S. and domestic students was the most important reason (Figure 9). Similarly, but to a lesser extent, 54 percent see their institution as serving a primary role in exposing U.S. students to a broader world view and another culture.

Figure 9: Reasons for Attracting More U.S. Students



Two top-cited and interrelated reasons, each of which accounts for approximately 67 percent of responding institutions, are that U.S. students can help the host institution become more globally competitive, and that a larger U.S. student presence helps promote research and academic collaboration between both sending and receiving institutions. The academic reputation that many U.S. institutions have and the potential to connect with such an institution can be a draw for institutions abroad. At the same time, institutions which have established partnerships with the U.S. (either in the form of exchange agreements, joint or dual/double degrees, etc.) may be able to position themselves globally (in countries other than the U.S.) to leverage these relationships to build and expand their own global network.

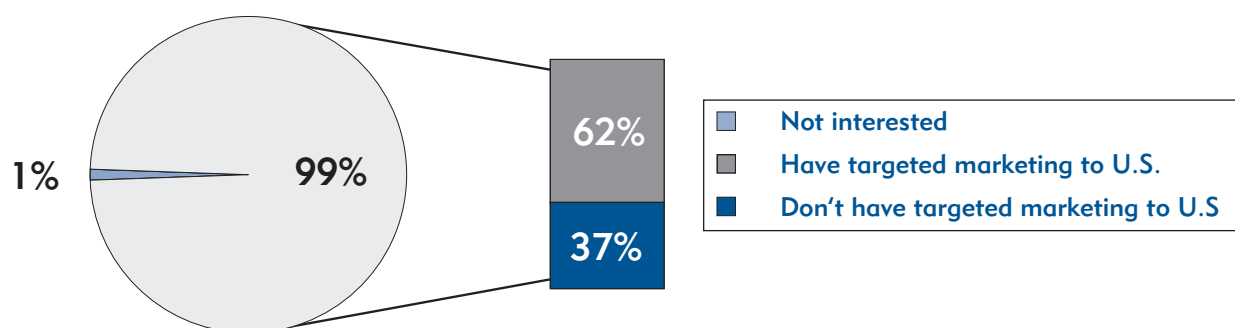
U.S. students, like other international students, often provide a financial incentive to receiving institutions. About 41 percent of institutions, especially private ones and those located in countries that charge higher fees for non-resident students, seek to attract more U.S. students because they would help to bring in additional revenue. However, it appears that overseas institutions place an even greater value on the financial incentive their own students might be able to receive in the U.S.: 59 percent reported that they encourage more U.S. students on their campuses in order that their own students might study on a “tuition swap” basis at a U.S. partner institution.

For the few institutions that reported they were not interested in attracting more U.S. students, one of the reasons cited was they did not place a specific priority on U.S. students; others cited a lack of resources and infrastructure (such as facilities and space,) and limited English-medium instruction.

B. How to Reach, Attract and Enroll U.S. Students

Of the 99 percent of responding institutions that want to attract more U.S. students to their campuses, 62 percent have developed outreach and marketing strategies targeted specifically toward U.S. students (Figure 10). The other 37 percent of institutions do not have any specific strategies in place to attract more U.S. students.

Figure 10: Percent of Institutions Interested in More U.S. Students and their Market Strategies



For many of the responding institutions, direct marketing toward the U.S. study abroad student may not always be a feasible option when broader recruitment goals may place an equal, if not greater, emphasis on all international students. However, as the sidebar to the right indicates, a number of institutions are employing a range of marketing approaches and promotional activities geared towards recruiting students from the U.S.

Outreach strategies to attract U.S. and other international students:

- Joining consortia of schools or partnering with a specific institution
- Creating linkages through attendance of educational fairs and conferences
- Providing short-term and summer programs, as U.S. students are more inclined to participate in shorter programs
- Creating linkages through faculty exchanges and visits
- Utilizing web sites as a marketing tool to attract and inform potential students
- Diversifying programs by offering more internships & practical experiences

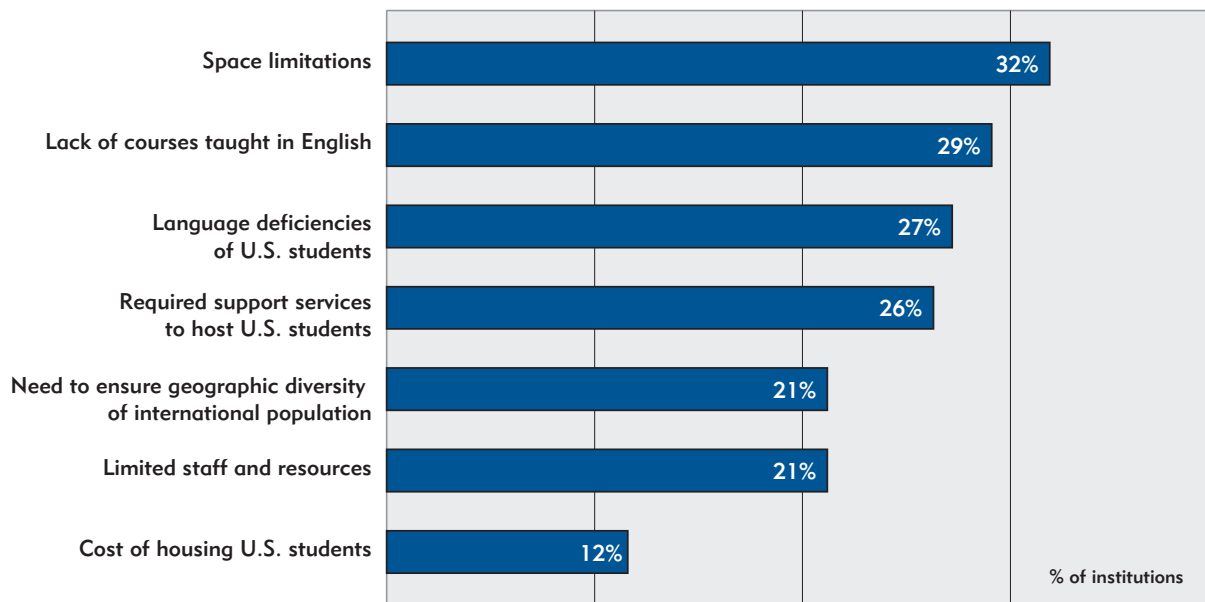
VI. Overcoming Challenges in Attracting More U.S. Students

Wanting more U.S. students is one thing, but actually absorbing more of them into an institution presents challenges that might ultimately limit expansion. Institutions were surveyed regarding what they perceived to be the key challenges to increasing the number of U.S. students enrolled at their campus, and were also asked to identify factors or strategies that could mitigate these challenges or limitations.

A. Critical Challenges in Hosting More U.S. Students

Challenges in hosting more U.S. students seem to vary from institution to institution (Figure 11). Many have cited space limitations, limited staff and resources, and challenges with providing adequate support services to host U.S. students. Others have noted that language deficiencies of U.S. students, coupled with their own lack of courses taught in English, pose challenges.

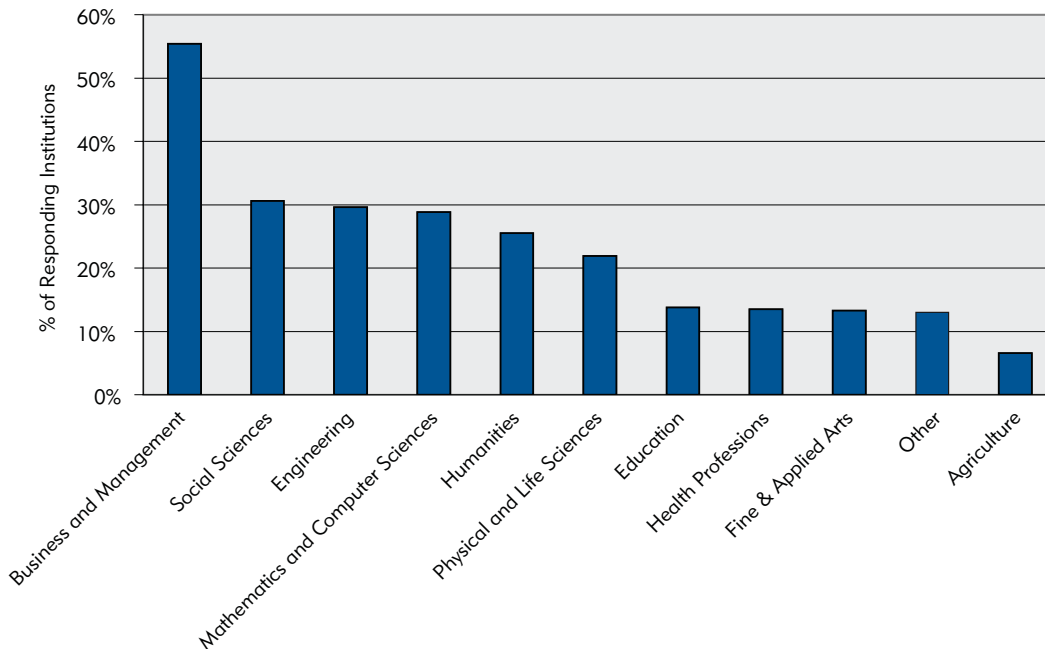
Figure 11: Potential Challenges for Receiving More U.S. Students



Language barriers continue to exist for host institutions abroad as well as for U.S. students aspiring to study overseas. After excluding institutions in Anglophone countries (Australia, Canada, Ireland, New Zealand and the UK) where virtually all courses are already offered in English, almost 40 percent of institutions in non-Anglophone countries cite their limited ability to offer instruction in English as a significant challenge, which surpassed “space limitations” as the number one challenge.

Despite the perceived shortage of courses taught in English at host institutions in non-Anglophone countries, English increasingly seems to have found its way into the mainstream curriculum and pedagogy of higher education classrooms around the world.¹¹ Many institutions in the EU that now offer full degree programs in English are eager to draw U.S. students directly to these programs.¹² A recent study by the Academic Cooperation Association (ACA) also found that programs taught in English in non-English-speaking European countries are on the rise, primarily at the Master’s level and in the engineering and business fields.¹³ Our survey also shows that overseas institutions in non-Anglophone countries are taking steps to address the English language challenge: 86 percent of responding institutions in non-Anglophone countries do offer some courses taught in English. Among institutions in non-Anglophone countries, Figure 12 reflects top fields of study where English is used.

Figure 12: Top Fields of Study for Courses Offered in English Among Respondents in Non-Anglophone Countries



But the language issue is two-directional, and simply increasing the availability of English language offerings at host institutions is only part of the solution to increasing U.S. study abroad capacity. Foreign language deficiencies of U.S. students also pose a challenge in increasing the number of U.S. students that study abroad, and as many as 37 percent of responding institutions (again, excluding institutions in Anglophone countries) cite this limitation. A lack of adequate preparation in the required foreign language at the home institution prior to departure might prevent a student from fully benefiting from the study abroad experience, especially when achievement depends on the level of immersion in the academic and social culture of the host country. Institutions abroad recognize this and are likely to push their counterparts in the U.S. to develop more rigorous requirements for language preparation—of the kind the National Security Language Initiative has addressed¹⁴—while also expanding their own intensive language instruction for incoming students.

Beyond infrastructure and language constraints, other key challenges reported by institutions included: the additional support services required to host U.S. students (26 percent); ensuring diversity in the student population by recruiting from a variety of countries and not just the U.S. (21 percent); working with limited staff and resources (21 percent); and the high cost of providing adequate housing for U.S. students (12 percent) (Figure 11). The sidebar to the right lists other challenges that were reported that are largely beyond a school’s control.

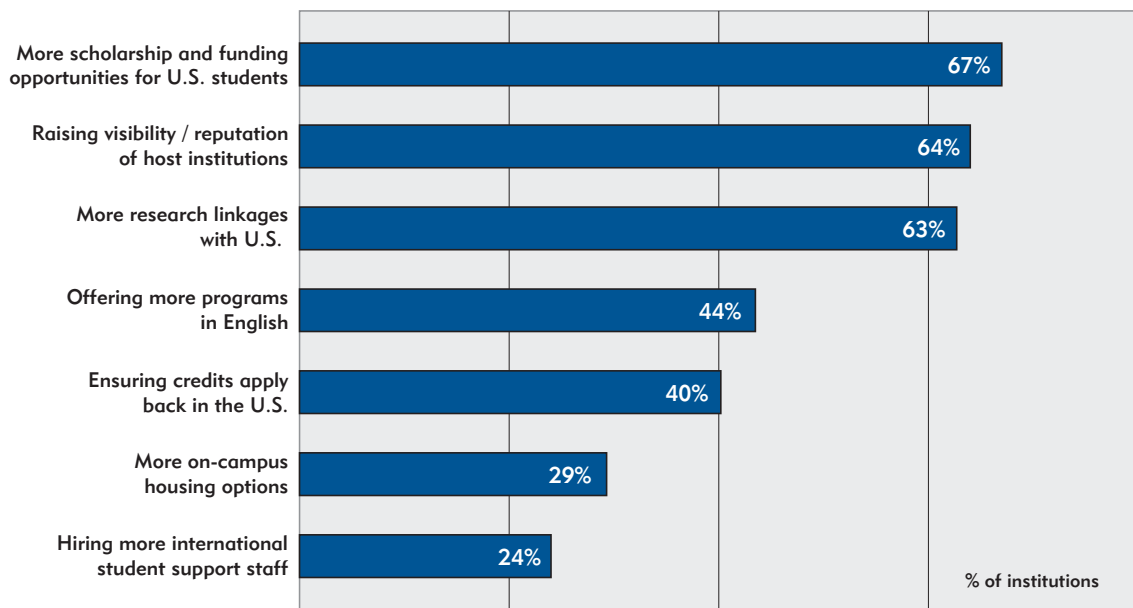
Additional challenges to increasing U.S. enrollment in overseas institutions:

- Devaluation of U.S. currency
- Lack of flexibility in American universities’ credit transfer system
- Climate and location of the host institution
- American perceptions that the quality of a U.S. education cannot be matched by international institutions
- Competition from other institutions as an increasing number of schools are offering quality programs at cheaper costs in many host countries

B. Key Strategies to Increase Institutions' Capacity to Host U.S. Students

The final section of the survey asked institutions to identify strategies or specific steps that could be taken to increase their capacity to attract and host U.S. students. A large proportion of institutions (67 percent) reported that providing more scholarship and funding opportunities for U.S. students was an important strategy (Figure 13). This top-cited strategy suggests that institutions outside the U.S. are just as concerned about the high costs of an overseas education for students as are their counterparts on U.S. campuses. More funds going directly toward U.S. students for study abroad would most likely help to increase the number of U.S. students on foreign campuses.

Figure 13: Key Strategies to Increase Institutional Capacity to Host U.S. Students



The next two strategies—raising the visibility and reputation of the institution among a U.S. higher education audience, and creating more research linkages with the U.S.—were also seen as highly effective approaches and are ones that are closely related. Many study abroad and exchange partnerships that grow from faculty networking and an institution's efforts to develop international linkages are likely to have a positive impact on its visibility and reputation within the U.S. and in the higher education systems of other countries. Not surprisingly, a fairly large proportion (44 percent) of respondents felt that offering more courses taught in English was likely to attract more U.S. students. Other strategies included: ensuring credits apply back in the U.S. (40 percent); providing more on-campus housing options (29 percent); and hiring more international student support staff (24 percent).

A few institutions also mentioned other factors that they considered important in changing the landscape of U.S. study abroad participation at their institutions. One respondent in Turkey thought a “general change of attitude toward Muslim countries would be beneficial.” Others cited more specific factors at the institutional level, including more effectively transmitting information on available programs in English and of programs in less-traditional destinations to U.S. students and institutions, which would help raise the profile of the host institution, its credibility and ability to attract more students. Also, respondents noted that more needs to be done on the U.S. side to encourage and motivate students to study abroad and to convince the general public (and the employment sectors) that study abroad is indeed a worthy venture.

VII. Conclusion

Increasing overseas capacity to host more U.S. study abroad students is a complex undertaking, the dimensions of which this second White Paper has only just begun to explore. While there is high interest and motivation among overseas institutions to host a larger number of U.S. study abroad students, there is no single strategy or formula for increasing capacity. Current and future capacity to host U.S. students, and the motivations for attracting more U.S. students and the specific strategies in place to achieve this goal, vary based on factors such as: the existence of national-level internationalization policies in a country; other institutional goals that might compete with the goal of internationalization; the actual infrastructure to host students, both in terms of the total number of institutions in a country that can accommodate more students and in terms of the physical space available at institutions; and the extent to which overseas institutions perceive an increased number of U.S. students on their campuses to be an outcome of reciprocity between their institution and U.S. institutions. Despite these institutional- and country-level variations, the findings of this White Paper suggest the following general conclusions:

- Institutions in other countries feel that the greatest room to absorb more international students (including U.S. students) appears to be in longer-term study abroad programs that last at least one academic session or an academic year, and in degree study. In contrast, the majority of U.S. students go abroad for shorter periods of study. This suggests a disconnect between host institution priorities and U.S. study abroad trends and is an area that requires more attention to help guide the national dialogue of increasing U.S. study abroad participation.
- Exchange agreements and joint- and dual-degree programs are also large areas of growth. In a related finding, the presence of U.S. students is seen as a catalyst for forming reciprocal and beneficial partnerships with U.S. higher education institutions, and for raising the international profile of the host institution.
- In addition to creating opportunities for institutional-level linkages, the presence of U.S. students on a campus is valued because it fosters an exchange of knowledge, culture and language through personal interaction.
- For many overseas institutions, increasing international enrollments is a central aspect of an overall internationalization mission. This attempt to increase enrollments is often focused on specific sending countries, with the U.S., China, India, Canada, and Russia figuring among the top five.
- Hosting U.S. students often provides an academic incentive to receiving institutions by enabling them to increase their global competitiveness and expand their joint research opportunities with U.S. sending institutions.
- Although language continues to be a barrier, both in terms of the foreign language deficiencies of U.S. students and the shortage of courses offered in English in countries where English is not the primary language, there are also indications that this gap is being bridged. An increasing number of U.S. students are beginning to acquire foreign languages,¹⁵ especially through federal

programs under the National Security Language Initiative and the National Security Education Program, as well as campus-based programs. And an increasing number of overseas institutions are also now offering courses in English. This finding is also supported by a recent study by the Academic Cooperation Association (ACA) that found that programs taught in English in non-English-speaking European countries are on the rise.

- From the perspective of overseas institutions, the most significant steps that could be taken at the U.S. end that would increase the numbers of U.S. students abroad would be: a) increasing host institutions' stature and visibility in the U.S.; and b) making available more funding and scholarships to enable a larger group of students to go abroad.

While this White Paper provides some early and broad-based findings of the key issues that U.S. institutions might encounter when attempting to send more students overseas, it also lays the groundwork for future in-depth research that is needed to address critical questions such as: What are the fundamental differences in the academic systems of the U.S. and various host countries and how these can be aligned to allow more international educational exchange? Will the Bologna Process help or hinder the U.S. study abroad exchange process? Is it reasonable to expect an increasing number of U.S. students to study abroad in destinations that already face pressure to accommodate their own student population? What will be the impact—positive or negative—of a larger U.S. student presence on the campus and wider community, especially in non-traditional destinations? And finally, and perhaps most important, how do we balance the goals of quality vs. quantity in attempting to send an increasing number of students overseas?

As part of the Institute's policy research initiative and with ongoing input from study abroad experts, the Institute plans to expand the dialog on these and other issues, in the context of assessing the overall capacity for increasing the number of American students who study abroad. We welcome your feedback on this second White Paper and your input on future research efforts.

Contact us at policyresearch@iie.org. Copies of this report can be downloaded at: www.iie.org/StudyAbroadCapacity.

Endnotes

¹The full report by the Commission on the Abraham Lincoln Study Abroad Fellowship Program, “Global Competence & National Needs: One Million Americans Studying Abroad”, can be accessed online at: <http://www.alliance-exchange.org/Lincoln%20Commission%20Report.pdf>.

²A copy of the paper is available at: www.iie.org/StudyAbroadCapacity.

³Bhandari, R. and Chow, P. (2007). *Open Doors 2007: Report on International Educational Exchange*. New York: Institute of International Education.

⁴American Council on Education (2008). *College-bound students' interest in study abroad and other international learning activities*. <http://www.acenet.edu/AM/Template.cfm?Section=International&Template=/CM/ContentDisplay.cfm&ContentFileID=3997>.

⁵IIE's Project Atlas is a research project that brings together a community of international exchange researchers to share common definitions and data on global mobility. Visit the Atlas of Student Mobility website at: <http://atlas.iienetwork.org>.

⁶Project Atlas partner organizations and others assisting with survey distribution included: the Academic Cooperation Association (ACA); the Asia-Pacific Association for International Education (APAIE); the Association of Indian Universities (AIU); the Association of Universities and Colleges of Canada (AUCC); Australian Education International (AEI); British Council; CampusFrance; the Canadian Bureau for International Education (CBIE); the China Education Association for International Exchange (CEAIE); the China Scholarship Council (CSC); the Consortium for North American Higher Education Collaboration (CONAHEC); Education Ireland; Education New Zealand; Education Singapore; EducationUSA Advising Centers supported by the Bureau of Educational and Cultural Affairs at the U.S. Department of State; the European Commission; Fórum de Assessorias das Universidades Brasileiras para Assuntos Internacionais (FAUBAI); Fulbright Center Finland; the German Academic Exchange Service (DAAD); the Hollings Center for International Dialogue; the International Association of Universities (IAU); the International Education Association of South Africa (IEASA); the Japanese Fulbright Commission; the Japan Network for International Education (JAFSA); the Korean Fulbright Commission; the Mexican National Association of Universities and Higher Education Institutions (ANUIES); the Netherlands Organisation for International Cooperation in Higher Education (NUFFIC); Perspektywy Education Foundation; the Swedish Institute; Turca Education Group Ltd.; the United Nations Educational, Scientific and Cultural Organization (UNESCO); and Universities UK. IIE is grateful for the valuable support and assistance from these organizations.

⁷Separate country profiles will be available online at: www.iie.org/StudyAbroadCapacity.

⁸To minimize the reporting burden on institutions, the survey asked them to estimate the range that most closely matched the number of international students at their institution instead of asking them to report the specific number of international students that fell within each academic level.

⁹For more information and data, visit: <http://opendoors.iienetwork.org>.

¹⁰Australian Government Endeavor Awards Scholarship website. <http://www.endeavour.dest.gov.au/default.htm>. Accessed 3/18/08.

¹¹Altbach, Philip. “The Imperial Tongue: English as the Dominating Academic Language”. *International Higher Education*. The Boston College Center for International Higher Education. No. 49 (2007): 2-4.

¹²For example, according to the Erasmus Mundus Masters Courses Compendium, in June 2007, there were 80 Masters Courses (degree programs) that had been established between multiple institutions in the EU, covering fields from engineering, natural sciences, social and life sciences, the humanities and multi-disciplinary programs. Just over 75 percent of the available programs either used English as the primary language of instruction or incorporated some English to a certain degree for instruction.

¹³Wächter, Bernd & Maiworm, F. (2008). *English-taught programmes in European higher education. The picture in 2007*. Academic Cooperation Association (ACA) Papers on International Cooperation in Education. Bonn: Lemmens.

¹⁴For more information on the National Security Language Initiative (NSLI), visit: <http://www.ed.gov/about/inits/ed/competitiveness/nsli/index.html>.

¹⁵Based on a 2006 survey, the Modern Language Association (MLA) reported a 12.9% increase in enrollments in languages other than English since 2002 (<http://www.mla.org>).

About IIE

The Institute of International Education is a world leader in the international exchange of people and ideas. An independent, nonprofit organization founded in 1919, IIE has a network of 20 offices worldwide. IIE designs and implements programs of study and training for students, educators and professionals from all sectors with funding from government and private sources. Programs that IIE administers for the U.S. Government and other sponsors, such as the Fulbright U.S. Student Program, the Benjamin A. Gilman International Scholarship Program, the David L. Boren Scholarships and Fellowships, the Language Flagship Fellowships, the Freeman Awards for Study in Asia, the Whitaker International Fellows and Scholars Program, and the Central Europe Summer Research Institute, send U.S. students abroad in growing numbers, preparing a new generation for global citizenship. The Institute is a resource for educators and institutions worldwide, publishing *IIE Passport: Academic Year Abroad* and *Short Term Study Abroad* and operating www.IIEPassport.org, the search engine for study abroad programs, as well as www.StudyAbroadFunding.org. IIE conducts policy research, program evaluation and provides advising and counseling on international education and opportunities abroad. IIE's annual survey of student mobility is published annually in the *Open Doors Report on International Educational Exchange* (www.opendoors.iienetwork.org), supported by the Bureau of Educational and Cultural Affairs of the U.S. Department of State.
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