

Scanning the U.S. Horizon

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World Education Services

INTERNATIONAL EDUCATION INTELLIGENCE

- **U.S. Higher Education Numbers**
- **U.S. Students Abroad in 2007/08**
- **Study Abroad Destinations**
- **International Students in the US**
- **New Environment**
 - abroad and at home
- **Addressing the challenge**

Higher Education Numbers

- **Over 4,000 colleges and universities offer degree-granting programs (40% are public and 60% private)**
- **18 Million students (15 million undergraduates & 3 million graduate and professional)**
- **623,805 international students**
 - **3% of total U.S. higher education enrollment**
- **283,503 international graduate students**
 - **12% of graduate enrollment**
 - **30% of graduate science and engineering enrollment**

Students Abroad in 2007/08

**241,800 U.S. students studied abroad
(1.3 % of total enrollment)**

- 90% are undergraduates
- 55.5% in short programs (less than 8 weeks)
- 40% in one-semester programs
- 4.5 % in year-long programs



Study Abroad Destinations of U.S. Students – 2007/08

- Europe: 57%
 - UK, Italy, Spain, France: 45.5 %
- Asia-Pacific: 16%
 - 10% Asia
 - 6% Australia & New Zealand
- Latin America: 15%

Source: IIE

Percentage of Students at the Graduate Level 2007/08 (Source: IIE)

India*	94,563	72%
Bologna Area	83,981	41.9%
China*	81,127	65.4%
Korea	69,124	35.7%
Japan	33,974	20.2%
Canada	29,051	44.9%
Taiwan*	29,001	55.4%
Mexico	14,837	30.6%
Turkey*	12,030	54.8%
Saudi Arabia	9,873	23.4%
Thailand*	9,004	56%

Fields of Study	International Students
Engineering	45%
Computer Sciences	43%
Physical Sciences	40%
Mathematics	37%

Contrasting Student Profiles

Americans Abroad

- **Mostly undergraduates**
- **Destination – mostly Europe**
- **Program length – decreasing to 8 weeks or less**
- **Social sciences and liberal arts**

International Students

- **Mostly Asian**
- **Enrolled in degree programs**
- **50% at the graduate level**
- **Mostly in engineering, business and science**

Asia –especially China- Looms Large

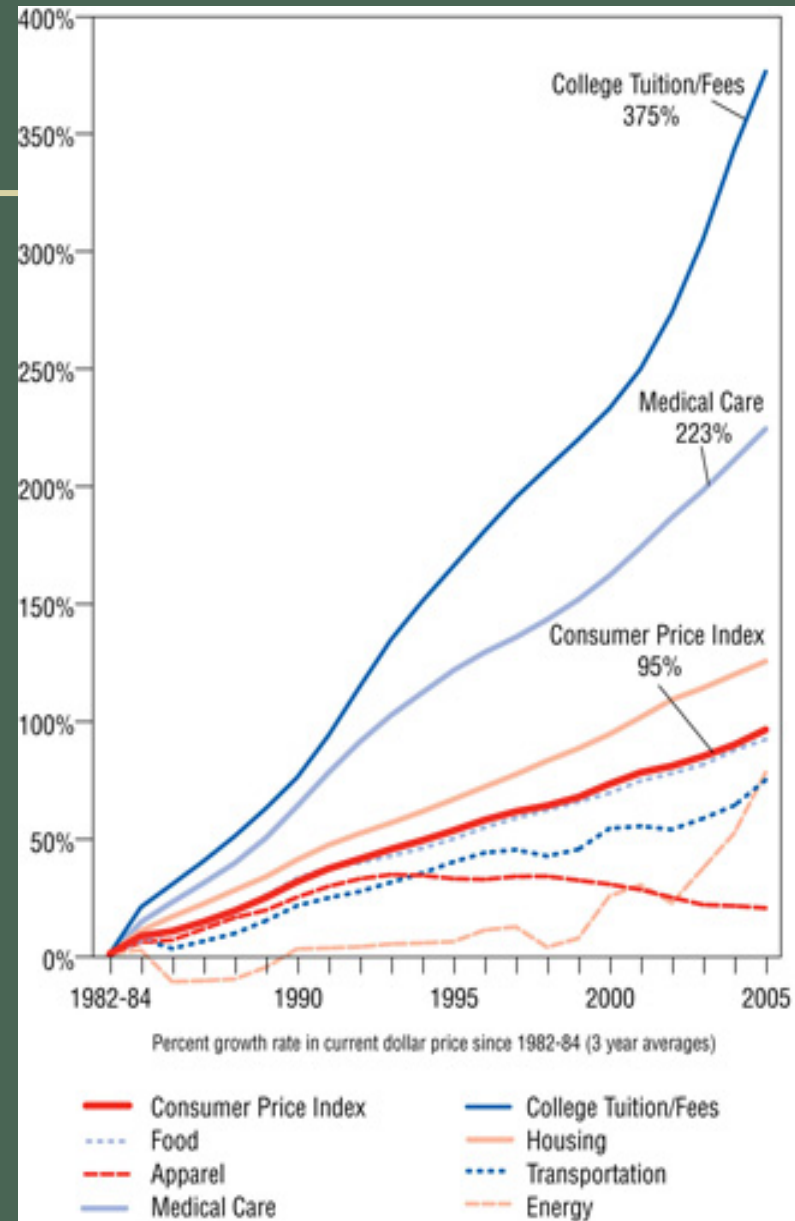
- **More than 50% of international students in the US are from Asia**
- **Graduate schools rely heavily on students from Asia**
- **China is sending more and more undergraduates to the US**
- **US universities pay a lot of attention to what goes on in China and to a lesser degree, India**
- **The fact that the Chinese are looking at the Bologna Process not lost on US higher education leaders**

Implications of Bologna Reforms for US Institutions

- **15% of international students are from “Bologna countries” (3rd after India and China)**
- **European universities aggressively promoting their new programs and degrees in Asia, the Middle East, Africa and South America**
- **Bologna Process has made European degrees transparent and portable**
- **New master’s degrees taught in English are attractive to international students**
- **Increased demand for dual degree arrangements**
- **3-year degrees will become the norm in 25 out of 30 OECD countries after 2010**
- **US universities keenly aware of the competition**

Heightened Awareness of the Bologna Process

- Bologna Process gaining increased attention among policy makers and university leadership
- Increased interest in the changes that have come about in Europe as result of BP
- One-year pilot 'Tuning USA' funded by the Lumina Foundation involving universities in Indiana, Minnesota, Utah to develop and define learning outcomes in 2 disciplines from the following: biology, chemistry, education, history, physics and graphic design



Source: National Center for Public Policy and Higher Education

Impact of Current Economic Crisis

- **Most, but not all, US universities are facing severe reduction in revenue:**
 - deep cuts in state budgets (California, Michigan, NY)
 - reduced income from endowments due to stock market losses
- **Families increasingly resistant to high tuition fees**
 - universities under pressure to offer more financial assistance
- **Students opting for less expensive alternatives**
 - public instead of private universities
 - 2-year colleges instead of 4-year institutions

Anticipated Changes

- **There is general agreement that there will be profound changes in US higher education**
- **The economic crisis has made the changes even more necessary and inevitable**
 - Changing demographics
 - Cost of higher education
 - Performance of higher education- are we producing what we need?
- **The international dimension will be an important part of the discussion**
- **The US will be looking at new paradigms:**
 - Europe for new exchange mechanisms
 - Australia for market-based internationalization

Internationalization in the US

- Long experience in sending and receiving students
- Robust infrastructure to support mobility
- Universities are open, flexible and have the tools to send and receive students internationally
- Decisions on internationalization are made primarily at the level of individual institutions –and sometimes states- and reflect local imperatives (tuition revenue, research...)
- No articulated government policy on internationalization

Required Reforms

- **Increased attention to internationalization by policy makers**
- **Send more American students abroad**
- **Improve international recruitment & admission practices**
- **Make study in the U.S. more affordable**
- **Make it easier for international students to work in the U.S. after graduation**
- **U.S. must modernize and streamline its visa and immigration policies**

The “New Normal”

- *“We won’t be going back, anytime soon, to business as usual .. We are in the midst of a regime shift, a hard transition into what my colleagues and I at Pimco call the new normal ..*

- *Companies and government agencies should be testing the robustness of their strategic and structural underpinnings against the challenges they’ll meet on the road to the new normal”*

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Mohamed A. El-Erian, CEO Pimco
Business Week June 1, 2009



Key Resources on US Higher Education and International Engagement

1. www.acenet.edu/
2. www.iie.org/
3. www.nafsa.org
4. www.cgsnet.org/
5. <http://www.ihep.org/Research/thebolognaprocess.cfm>

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Thank you.