

TOEFL[®]

Monograph Series

MS - 14
APRIL 2001

Looking Back, Looking Forward: Trends in Intensive English Program Enrollments

William W. Powell



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William W. Powell

**Educational Testing Service
Princeton, New Jersey
RM-01-01**



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Foreword

The TOEFL® Monograph Series features commissioned papers and reports for TOEFL 2000 and other Test of English as a Foreign Language program development efforts. As part of the foundation for the TOEFL 2000 project, a number of papers and reports were commissioned from experts within the fields of measurement and language teaching and testing. The resulting critical reviews and expert opinions were invited to inform TOEFL program development efforts with respect to test construct, test user needs, and test delivery. Opinions expressed in these papers are those of the authors and do not necessarily reflect the views or intentions of the TOEFL program.

These monographs are also of general scholarly interest, and the TOEFL program is pleased to make them available to colleagues in the fields of language teaching and testing and international student admissions in higher education.

The TOEFL 2000 project is a broad effort under which language testing at ETS will evolve into the 21st century. As a first step in the evolution of TOEFL language testing, the TOEFL program recently revised the Test of Spoken English (TSE®) and announced plans to introduce a TOEFL computer-based test (TOEFL CBT) in 1998. The revised TSE test, introduced in July 1995, is based on an underlying construct of communicative language ability and represents a process approach to test validation. The TOEFL CBT will take advantage of the new forms of assessments and improved services made possible by computer-based testing while also moving the program toward its longer-range goals, which include

- the development of a conceptual framework that takes into account models of communicative competence
- a research agenda that informs and supports this emerging framework
- a better understanding of the kinds of information test users need and want from the TOEFL test
- a better understanding of the technological capabilities for delivery of TOEFL tests into the next century

It is expected that the TOEFL 2000 efforts will continue to produce a set of improved language tests that recognize the dynamic, evolutionary nature of assessment practices and that promote responsiveness to test user needs. As future papers and projects are completed, monographs will continue to be released to the public in this new TOEFL research publication series.

TOEFL Program Office
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Abstract

In order to create credible forecasts for enrollment trends in intensive English language programs (IEPs) in the United States, analyses of past influences on IEP enrollments were undertaken. Reviews of available censuses of international students were conducted and then related to external circumstances that seem to affect the movement of students into IEPs. The implications of similar circumstances for future IEP enrollments and for future IEP-related use of the TOEFL test were then posed. A final section of the monograph discusses “test reverberation,” or the attitudinal impact that changes in TOEFL format will have on IEP students, instructors, and administrators.

World economics, political developments, and educational policy and social change were viewed as the three major categories of influences on IEP student flows. Within each category a number of factors were identified as having substantial potential to affect IEP enrollments. The interrelatedness of many of the variables influencing IEP enrollments was also discussed, as were the possible effects of previously unencountered influences. The major findings of the study suggest that IEP administrators should pay close attention to events occurring far outside the walls of their English programs in order both to anticipate future enrollments and to position their programs to respond to changes in the intensive English market.

Key words/phrases: Intensive English programs, enrollment trends, international students, socioeconomic factors, English language assessment, test washback

Table of Contents

	Page
1. Introduction.....	1
2. Intensive English Programs, Their Students, and International Students in General.....	2
The Issue of Numbers.....	2
IEP Students and International Students	3
3. Influences on IEP Enrollments	7
Economics	7
Currency Exchange Rates	9
Domestic Economies	11
Implications	11
Political Developments	15
Implications	17
The Effects of Educational Policy and Social Change.....	19
Demographic Changes	24
Implications	27
Wild Card Factors	29
IEPs in 2010	29
4. Intensive English Programs and TOEFL 2000	31
References.....	32

List of Tables

	Page
Table 1 By-Country Comparison of IEP and Overall International Student Enrollment.....	4

List of Figures

Figure 1 Chinese IEP and Overall International Student Enrollment.....	5
Figure 2 Japanese IEP and Overall International Student Enrollment	5
Figure 3 Japanese and Chinese IEP to Overall-International Student Ratios.....	6
Figure 4 Saudi IEP Enrollment and Oil Prices	8
Figure 5 Venezuelan IEP Enrollment and Oil Prices	8
Figure 6 Japanese IEP Enrollment and Yen/Dollar Average Annual Exchange Rates	9

1. Introduction

Within intensive English programs (IEPs) in the United States and in many other countries, a central purpose is preparation for the Test of English as a Foreign Language (TOEFL®). For many of the students who intend to undertake academic studies in the United States, “passing the TOEFL test” describes their reason for enrolling in an IEP. Even those students not preparing for admission into a degree program feel the influence of the TOEFL test, since it affects the attitudes and aspirations of their classmates and often drives the curriculum of their English programs.

Data for the 1997-98 testing year show that 30.2% of all TOEFL candidates were tested in the United States (Educational Testing Service, 1998). One can assume that many of those 184,608 candidates were or had been enrolled in IEPs around the country. TOEFL’s Institutional Testing Program provided testing for another 101,814 candidates in the United States during the same period, most often as a required or optional component of IEP curricula. Since the mean total score of 532 reported in the *TOEFL Test and Score Data Summary* (Educational Testing Service, 1999) indicates that many of the 786,345 examinees in the 1997-98 testing period did not obtain the 500-plus score commonly found as a minimum required score for university admission, some of those candidates must have then sought admission to an IEP. The Overseas Institutional Testing Program added 205,115 candidates in the 1997-98 testing year, with a large number of them taking the test in conjunction with current, and then perhaps subsequent, studies at a language program either at home or in the United States. Thus, the results of international testing influence both IEP enrollment and subsequent testing in the United States.

According to *Open Doors 1997-98* (Davis, 1998), international students at United States postsecondary institutions represented only 3.4% of the total enrollment in 1997-98 (the highest percentage to date), but they obviously constitute close to 100% of the enrollments in most IEPs. Enrollment trends for international students in IEPs are therefore much more directly related to survival than they are for international students in postsecondary institutions in general, and such trends are pertinent to the TOEFL program in general and certainly to the TOEFL 2000 project as it comes online.

After first exploring the IEP corpus, this paper attempts to analyze the influences to which IEP enrollments have been and are currently susceptible, and then make projections as to how these influences will affect the nature of enrollments after 2000. In doing so it becomes evident, however, that IEP operations are interestingly fragile and sensitive to external events and circumstances that few have accurately predicted. Lastly, this paper also addresses the issue of test washback, although from a “consumption” rather than a testing perspective.

2. Intensive English Programs, Their Students, and International Students in General

The Issue of Numbers

Though the professional association, Teachers of English to Speakers of Other Languages (TESOLSM), is establishing an IEP accreditation process in the United States, IEPs form a “fragmentary community” that lacks any centralized or coordinating organization that keeps track of their number or nature (S. Pickett, Personal Communication, September 6, 1994). While *Open Doors 1994-95* (Davis, 1995) included a survey of what was to date a record number of 494 IEPs, Harshbarger (1994) contended at the time that over 900 intensive English programs were operating in this country. While many of these IEPs identified by a TESOL task force on IEP accreditation may not have lengthy life spans or may not be fully intensive programs, Pickett (Personal Communication, September 6, 1994) also felt that the 900-plus number was “reliable in scale.” If so, *Open Doors* has been lacking data on an important number of IEP students. Although an effort was made for the *Open Doors 1997-98* survey to include more programs, especially independent proprietary IEPs (Davis, 1998, p. 112), the data accumulated represent 489 out of the 536 programs surveyed, a total that obviously does not agree with the estimates of others.

The number of intensive English programs responding to the *Open Doors* survey is reported in each year’s edition. It has often been unclear from *Open Doors* data whether, particularly in times of growth, changes in the number of programs result from the creation of new programs between surveys or the “discovery” of existing programs for inclusion in the data collection process. In 1978-79, the first year for IEP data in *Open Doors*, 23,607 students were reported attending 163 programs; in the 1997-98 edition, 54,052 were reported attending 489 programs. The number of programs had tripled, while the number of students had increased just over twofold.

This lack of information on the number of IEPs in existence in the United States is complicated by inadequate data on the number of IEP students in any given year. Although the response rate to the *Open Doors* IEP survey in 1997-98 was high, almost 9% of identified IEPs did not respond to the request for information. Programs, of course, can be closed. Other programs, for whatever reason, occasionally neglect to report their current year’s enrollment.

An example is the well-established TESL Institute at Tulane University, which reported 926 students in 1994-95, but for which data are not included in the next survey two years later; data for the program (and similarly for 19 other programs) then reappeared in the 1997-98 survey. Indeed, carrying forward the numbers from the 1996-97 data for IEPs that did not respond to the 1997-98 survey would increase the 1997-98 total IEP enrollment in the *Open Doors* data by 5,035 students or 9.32%. The 1997-98 survey of IEPs totaled 25 more programs than the previous year’s survey, and the combination of “new” programs and re-reporting programs (i.e., those programs that had reported in 1994-95 and 1997-98, but not in 1996-97) yielded 13,978 students in that year’s data from schools that were not included in the previous year’s survey. In addition to these issues concerning the reliability of the data reported about IEPs, Harshbarger (Personal Communication, July 7, 1994) points out that in some institutions students are classified as officially admitted, degree-seeking students although they take classes on a full-time basis in an institution’s IEP. His point also raises another issue: how to count students who are permitted to take academic courses on a part-time basis while continuing studies in an IEP.

One further problem with the numbers of IEP students is that the Institute of International Education census of colleges and universities and its survey of intensive English students are completed in the fall of each year. For general international student enrollment, that process is adequate because most students enroll for the academic year. In IEPs, on the other hand, enrollments generally (but not always) tend to diminish as the year progresses; some students may attain whatever level of English proficiency they need after a single session, while others may need to re-enroll for another or multiple sessions depending on their entry proficiency level, their purposes for studying English, the proficiency level they seek, and the length of a session. (Sessions vary in length among IEPs, generally running from four weeks to a semester.) Meanwhile, new students are beginning their English studies in IEPs whenever a new session begins. (The 1994-95 edition of *Open Doors* [Davis, 1995] includes useful data on spring and summer initial enrollments, although the numbers associated with total enrollment over the course of a year are not yet available.)

This facet of IEP enrollment is important to the counting of IEP students and in evaluating enrollment trends. For example, when an enrollment trend brings in students with initially lower proficiencies in English, longer sojourns for individuals in IEPs are implied; students enrolled in the fall may well be on the IEP rolls in the spring (and the summer, and maybe even into the next year). The influx of Saudi Arabian students into IEPs in the early 1980s is an example of this situation.

When students with higher proficiencies enter IEPs, the turnover rate is greater; students enrolled in the fall may be gone by January. Such was the case of undergraduate students from Malaysia in the early 1980s as well. The setting of minimum proficiency requirements for students before they can receive support for IEP study from their governments or other sponsoring agencies and/or time limits for such support can also affect IEP sojourn length.

The scenario, then, is one of cloudy information on actual enrollment in IEPs. *Open Doors*, considered by many to be the most reliable — perhaps because it is the only — source of data on IEP enrollments, may survey little over half of the IEPs in the country counted by the TESOL task force. What's more, the accuracy of the data on those IEPs is somewhat incomplete, since the data collection depends on the response of institutions. In short, we do not have firm data on either the number of intensive English programs or the number of the students they enroll. Despite those limitations, and since no other data source exists, this paper will rely on the data extracted from the *Open Doors* annual reports (Zikopoulos, 1981-1993; Davis, 1994-1998; Institute of International Education, 1999a, 1999b) for the analysis of trends.

IEP Students and International Students

Important differences exist between trends in IEP enrollment and trends in overall international student enrollment in the United States. One obvious difference stems from the instructional status of English in the students' countries of origin. Students from nations where English is used as a language of instruction would logically be expected to be the source of fewer IEP students. A review of the leading countries of origin in *Open Doors 1997-98* for both IEP students and international students in general (i.e., students in degree programs) shows that five countries appear in the top 10 of each list. Absent from the IEP list are Canada, India, Malaysia, and Hong Kong, all of which have "traditions," although decidedly varying, of making English a primary, or strong secondary, language of instruction in

secondary schools. Indeed, as recently as *Open Doors 1991-92*, the point was made in the section on intensive English programs that Hong Kong would *not* be expected to show up on the IEP list since it was at that time a Commonwealth country (Zikopoulos, 1992); previous years also mentioned Malaysia, which in 1981-82 appeared on both lists.

The TOEFL total-score means for students from both Canada and India are well above the total group mean of 532 (Educational Testing Service, 1999), while the means for students from Malaysia and Hong Kong are under, but within 10 points of the group mean. In the countries of origin appearing on both lists (China, Japan, Korea, Taiwan, and Thailand), English has more of a foreign language status within the educational systems, and the TOEFL means of students from four of these countries (Japan, Korea, Taiwan, and Thailand) are below the total group mean. These four countries also accounted for 56.1% of the (pre-Asian economic crisis) IEP students reported in *Open Doors 1997-1998*. Intriguingly, as will be discussed below, the mean for students from one country on both lists, China, is 560.

A further comparison of the IEP data to the overall *Open Doors 1997-1998* data, with specific reference to those countries on both lists, yields interesting information on comparative percentages of representation. Table 1 shows the percentage of the total IEP enrollment and the percentage of overall international student enrollment that each of these countries provides. The *Open Doors* data are complicated by the fact that some IEP students are included in the overall data; students may get counted in both categories. Nevertheless, several noteworthy observations can be made from this comparison.

Table 1 By-Country Comparison of IEP and Overall International Student Enrollment

Country	IEP enrollment		Overall international enrollment	
	Total	Percentage of total IEP enrollment	Total	Percentage of overall international enrollment
Japan	12,128	22.4	47,063	9.8
Korea	12,044	22.3	42,890	8.9
Taiwan	3,992	7.4	30,855	6.4
Thailand	2,148	4.0	15,090	3.1
China	1,356	2.5	46,958	9.8

Source: Davis, 1998

First, Japanese, Korean, and Taiwanese students accounted for over 52% of the IEP students reported. Second, while Taiwanese and Thai students have similar percentage representations in both categories, the percentages of Japanese and Korean students in IEPs are more than twice what their representation in the overall international student population would suggest. Third, the situation of Chinese students is of particular interest: They are noticeably underrepresented in the IEP population, given their status as either the largest or second-largest group of international students in general during the 1990s, and compared to the IEP/overall international student ratios found with students from the other countries.

Figures 1 and 2 show graphs of Chinese and Japanese IEP students and international students in general (i.e., those included in the *Open Doors* overall student censuses) from the 1980s through the

1990s. Indeed, on average between 1990 and 1998, Chinese student enrollment in IEPs has been less than a tenth of Japanese student enrollment. In order to illustrate the difference between Chinese and Japanese enrollment patterns, Figure 3 provides ratios of IEP enrollment to overall international enrollment since the 1980s.

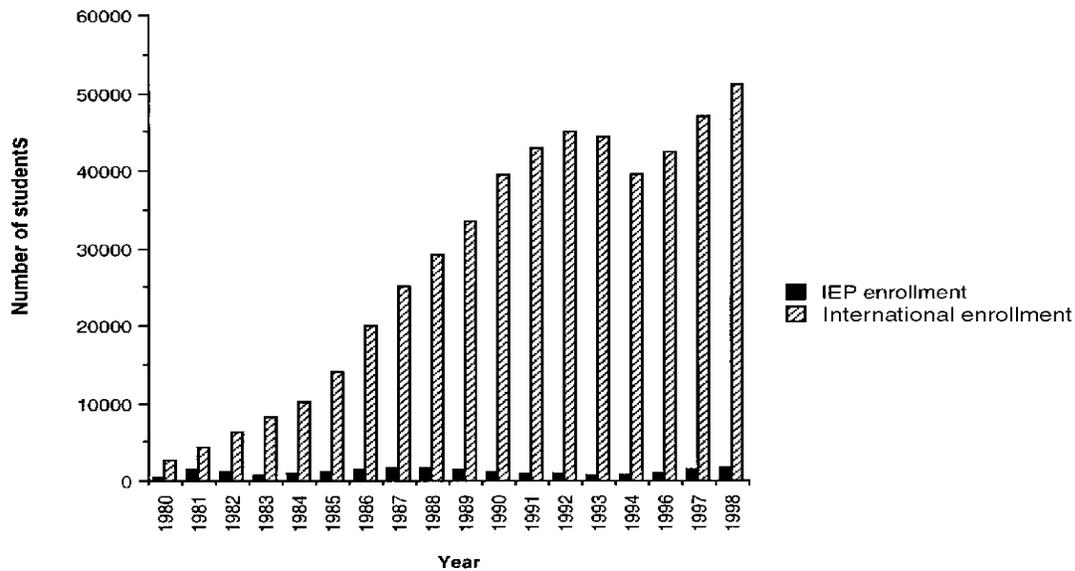


Figure 1. Chinese IEP and overall international student enrollment.

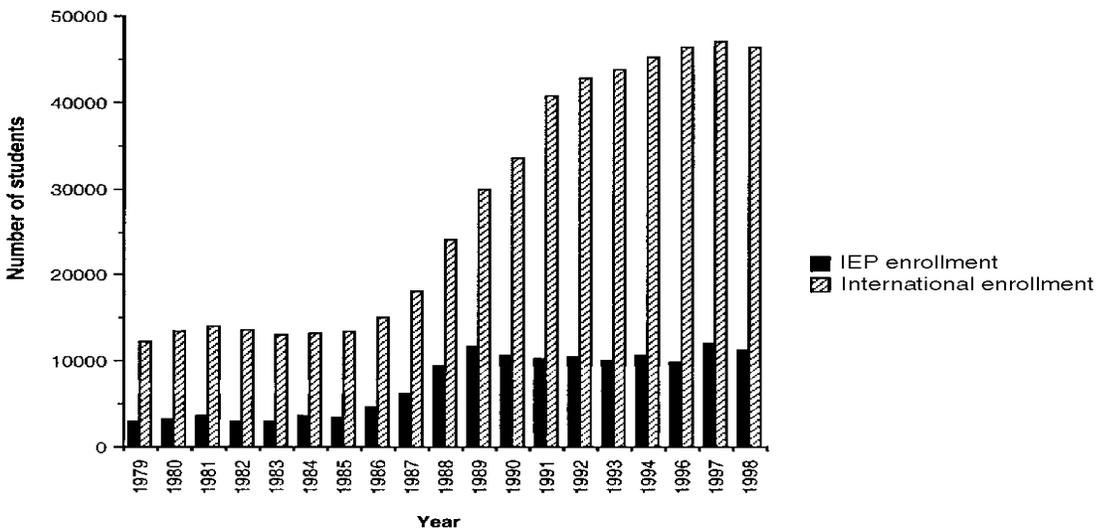


Figure 2. Japanese IEP and overall international student enrollment.

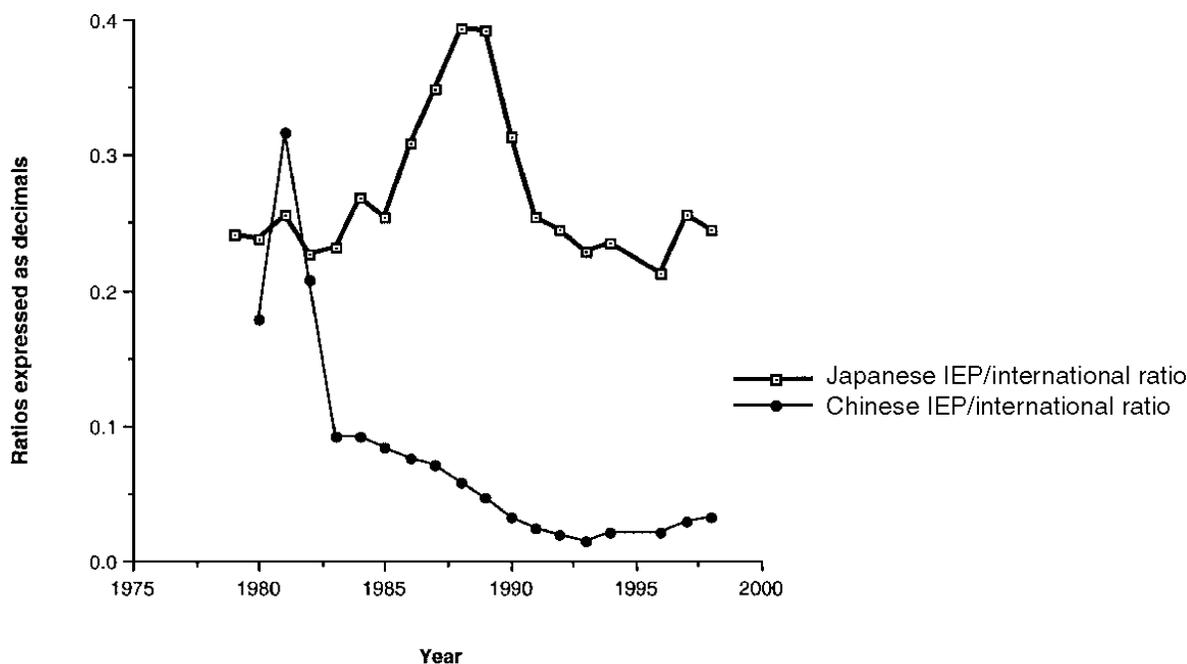


Figure 3. Japanese and Chinese IEP to overall-international student ratios.

The Chinese-Japanese enrollment contrasts underscore an important aspect of intensive English programs: They are cost-intensive as well as instruction-intensive. In 1995, the gross national product (GNP) per-capita of China was \$2,303, compared to \$9,437 in South Korea and \$41,160 in Japan (U.S. Department of Commerce, 1998). The least expensive IEPs charge around \$1,300 per semester in tuition alone, with more expensive programs charging \$1,000 a month or more. When the costs of living, transportation, books, several terms of enrollment, and other needs are added, the financial burden of attending an IEP can easily run into several times the current Chinese per-capita GNP. IEPs in general lack resources to provide financial assistance to students, nor can they offer teaching or research assistantships to support studies in the United States. *Open Doors 1997-1998* indicates that in 1996-97, 83.5% of the Chinese students in the United States were undertaking studies at the graduate level,¹ where financial support is more plentiful for international level students. In contrast, only 18.8% of the Japanese students surveyed were enrolled at the graduate level.

¹ It is interesting to note that, according to an Educational Testing Service (ETS®) report on TOEFL scores, the mean score for Chinese students taking the test during the July 1997 to June 1998 testing period was 560 (ETS, 1999). Since most Chinese students are studying at the graduate level, and since an ETS survey indicates that 66% of U.S. graduate programs accept international students with TOEFL scores in the 550-597 range (ETS, 1995), one explanation for the lack of Chinese students in IEPs may be a relative lack of need for English instruction. The portion of the over 79,000 Chinese examinees that scored over 550 during that testing period would be more than enough to sustain the 40,000 student enrollment levels of Chinese students in U.S. universities, especially since most of those students would be involved in multi-year degree programs.

3. Influences on IEP Enrollments

IEP enrollments can be particularly sensitive to worldwide political, economic, and educational events and circumstances, more so than general international student enrollment at U.S. institutions. Often that sensitivity has an immediate manifestation. For example, IEPs sustained a 79.8% decrease in the number of Iranian students in 1980-81 — the year following the Iranian Revolution of 1979; during the same period, general Iranian enrollment dropped only 7.3% (Zikopoulos, 1981). It took until 1987-88 for general Iranian enrollment to decline by a percentage comparable to that of the IEP enrollment (though Iranian IEP enrollment did rise again in the mid-1980s).

In economic and educational policy contexts, the influences can be similarly dramatic. A 151% increase in the price of oil between 1979 and 1981 contributed to 63% growth in the number of Venezuelan students in IEPs over the same period. Similarly, reorientation of Malaysian educational policy led to an 898% increase in the number of Malaysian students in IEPs in 1981-82. This section examines the influences that have affected IEP enrollments over the last 15 years, often in what can be called a “tidal effect,” with nation-specific student movements changing according to the effect of these influences. Although the influences are grouped into economic, political, and educational categories, they are characterized by considerable interdependence. Implications for future IEP enrollments are also discussed.

Economics

Between fall 1979 and fall 1981 the number of IEP students reported in the *Open Doors* data increased by 48.9%; the coincidental leap in oil prices was mentioned above. Similarly, between 1987-88 and 1989-90 the number of IEP students grew by 46.2%, a jump fueled at least in part by the negative 46.3% slide in the dollar against the yen (annual average exchange rate) between 1985 and 1988. On the downside, an over-20% decrease in IEP students characterizes the 1981-82 to 1983-84 period, a time when oil prices, in dollars, declined almost 18%. Likewise, the 1997 Asian Crisis saw some IEPs lose half their enrollments over the course of the next year. These examples illustrate the effect that global economics can have on IEP enrollments. A crucial aspect of the link between IEP enrollment trends and economic trends is the capacity for students or their national sponsoring agencies to pay the expenses of IEP study. That capacity is the most influential factor in assessing and predicting IEP enrollments.

Oil. In the 1970s and early 1980s, students from member countries in the Organization of Petroleum Exporting Countries (OPEC) often dominated IEP student bodies. Indeed, *Open Doors* data show that students from OPEC countries accounted for 32% of IEP enrollment in 1980-81. The presence of these students was important enough to warrant a subsection on OPEC countries in the *Open Doors* chapters on the geographic origins of international students studying in the U.S. during the late 1970s and early 1980s. The considerable drop in oil prices (accompanied by the fall of the dollar, discussed later), which began in 1982, had an immediate and interestingly parallel effect on OPEC student enrollments in IEPs.

Figures 4 and 5 compare the movements of oil prices and change the enrollment of Saudi and Venezuelan students in intensive English programs from the late 1970s through the 1990s. (Enrollment figures and annual average oil prices have been converted to z-scores for a common comparison scale.) The portion of Venezuelan students in IEP programs went from 19% to 2.9% in the course of the four years between 1980 and 1984. As oil prices rebounded from their 1988 lows, both Saudi and Venezuelan enrollments moved upward, though perhaps conservatively given the erratic trend line in oil prices. Indeed, oil prices dropped again in 1998 and most of 1999, falling to near record 20-year lows around \$12 a barrel in early 1999 before rebounding to near \$25 a barrel in late 1999.

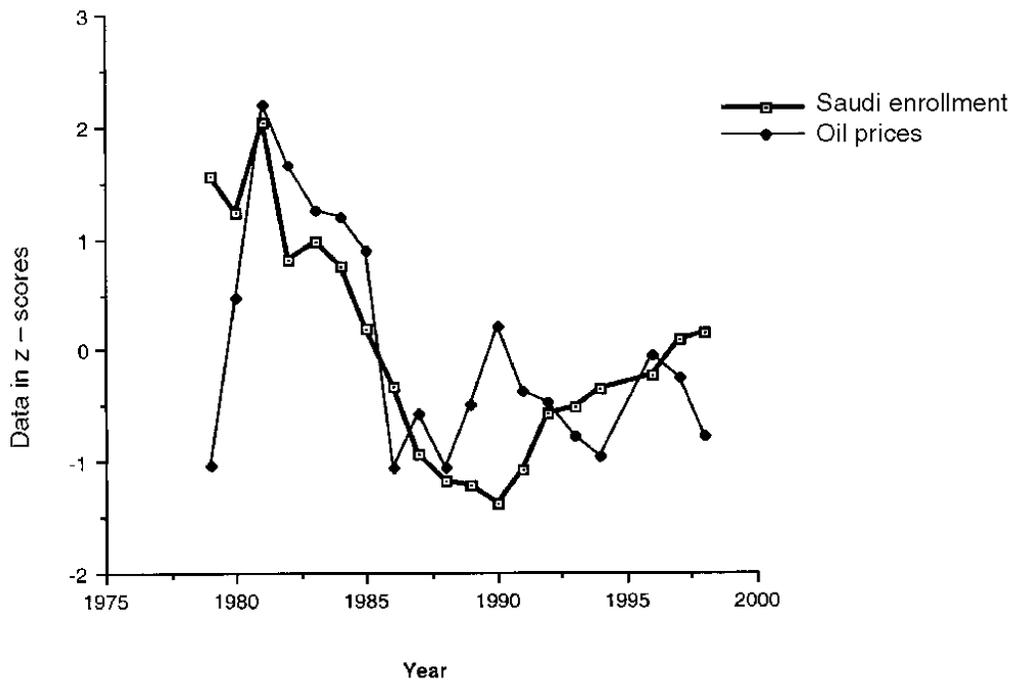


Figure 4. Saudi IEP enrollment and oil prices.

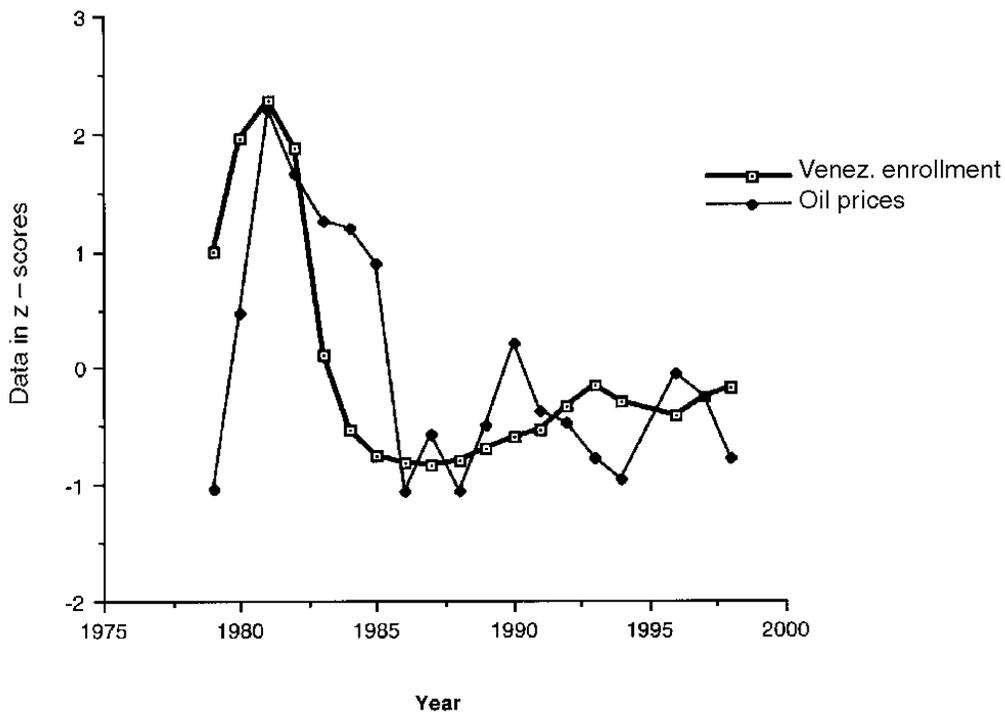


Figure 5. Venezuelan IEP enrollment and oil prices.

Currency Exchange Rates

The mid-1980s slide in oil prices may have created an ebbing tidal flow among students from OPEC countries, but it was offset over the long run by the fall of the dollar against major world currencies. The high dollar of the mid-1980s complicated the cost of IEPs discussed earlier due to a less favorable exchange rate. As the dollar reached the decade high in 1985, *Open Doors* data showed a 5.7% decline in IEP enrollments. For students whose national currency is not tied to the dollar somehow, a high dollar makes an IEP tuition more expensive.

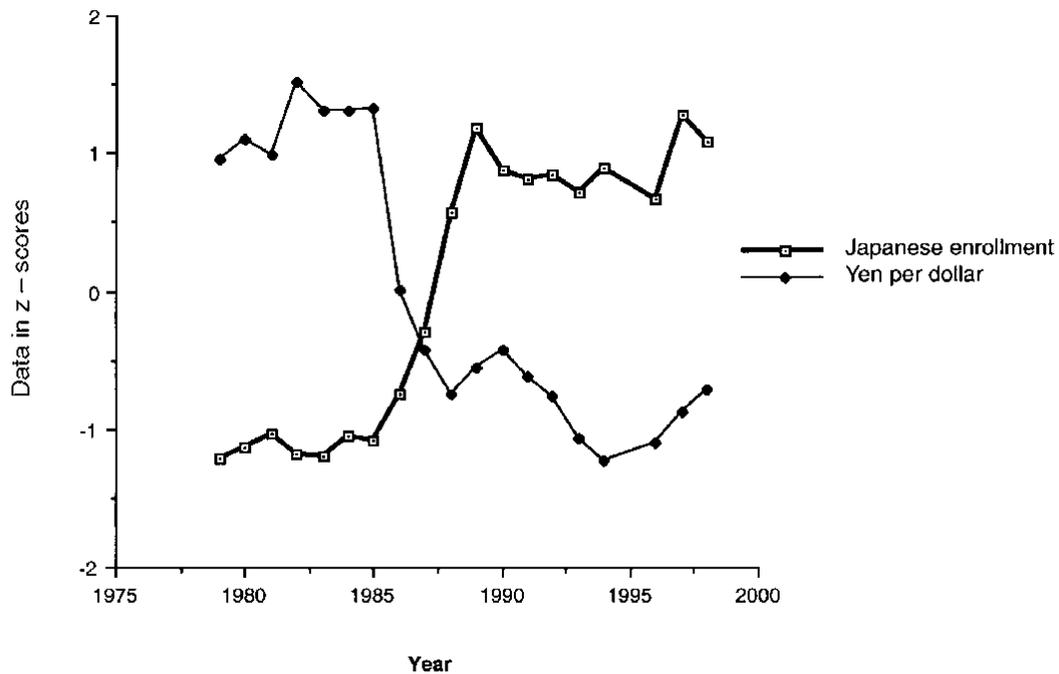


Figure 6. Japanese IEP enrollment and yen/dollar average annual exchange rates.

Japan had always ranked among the top five countries of origin in *Open Doors* since IEP data were first included in the 1978-79 edition. Beginning in 1985, the rapid increase in the number of Japanese students provides an illustrative example of currency-related IEP enrollment growth. As the dollar fell 29.4% against the yen between 1985 and 1986, the number of Japanese students in IEPs soared by 36.9%. The dollar continued an overall decline against the yen, and the number of Japanese students in IEPs continued to grow until 1990, before stabilizing in the mid-1990s, as shown in Figure 6. The April 1995 post-World War II low of 79.75 yen to the dollar reflects a 66.6% drop when compared to the 238.47 annual average yen/dollar exchange rate of 1985. The favorable exchange rate mitigated the cost

density of IEP tuition for Japanese students and made an IEP experience more affordable.² European student enrollments, while not nearly as dramatic in terms of raw numbers of students, also experienced considerable growth rates in the late 1980s as the dollar settled at rates over a third less than that of 1985.

Currency fluctuations, of course, work in both directions in influencing enrollment. From spring 1994 to spring 1995, the dollar lost about 20% as it fell to an 80-yen level; by spring 1996, the dollar had returned to the 105-yen level, a 32% increase over the year before. From the end of 1996 through the summer of 1999, the yen traded in the 110- to 130-yen level, except for a six-month period in 1998 when it ranged from 130 to near 150 yen. The point is that, for students accustomed to the sub-100 yen/dollar rate, a 130 rate, for example, represents a 30% decline in their “purchasing power” in relation to tuition costs.

Several currency crises in the 1990s underscore the sensitivity of IEP enrollments to world economic situations. The effects of the near-catastrophic recession and currency devaluation in Mexico in December 1994 showed up in the 1996-97 *Open Doors* data; Mexican student enrollment in IEPs, which had more than doubled from 1,113 to 2,265 students between 1992-93 to 1994-95, fell 31.2%. By fall 1998, the Mexican peso had lost over 65% of the value it had against the dollar, and Mexican enrollments in IEPs had fallen 50.1% from the 1994 high.

Even at its peak in 1994, Mexican student enrollment accounted for just over five percent of total IEP enrollment. The Asian Crisis that began in fall 1997, on the other hand, most directly affected the enrollments of students from countries (Korea, Thailand, Taiwan, and Indonesia) that accounted for over 35% of IEP enrollments in 1997-98 and for over 58% of enrollments if the related economic situation in Japan is included. The financial turmoil in Asia resulted in the Korean won and the Thai baht both losing over 48% of their values between July 1 and December 31, 1997, while the Indonesian rupiah lost 56% of its value against the dollar.

Needless to say, the impact of the Asian Crisis on IEP enrollments was significant. A survey conducted by NAFSA: Association of International Educators (NAFSA: AIE) and the Institute of International Education in spring 1998 (Davis & Duval, 1998) found that, of the 195 IEPs responding, 46% of the programs reported Korean student enrollment declines of more than 20% compared to the previous spring, and a third reported enrollment drops of more than 20% among Thai students. In October 1998, a less formal survey of 68 programs associated with the American Association of Intensive English Programs found that 68% had experienced a decline in enrollments, with the overall decline averaging 17% (though the average enrollment drop was 25% for those programs with declines; A. Blackwell, Personal Communication, April 1, 1999).

Because of the annual reporting schedule for *Open Doors* and the timing of the Asian Crisis (during the fall when the annual surveys are conducted), a clear picture of its financial impact appeared only with the World Wide Web report on the 1998-99 *Open Doors* data, available before the publication of the book itself (Institute of International Education, 1999b). This report showed that enrollments from Korea, Thailand, and Indonesia fell 54.7%, 59%, and 56.9%, respectively, between fall 1997 and fall

² Interestingly, Powell et al. (1996) discovered in interviews with IEP students that some Japanese students felt that their classmates from other countries were “richer” than they were. Perhaps the favorable currency circumstances for Japanese students have allowed a more middle-class student group to attend IEPs, while students from other countries who have not received government sponsorship for their IEP studies tend to come from wealthier families.

1998, significantly contributing to the 18.6% overall decline in IEP enrollments for 1998. Yet to be factored into *Open Doors* data are the January 1999 devaluation of the Brazilian real and a deepening crisis in Russia, termed as “one of the deepest depressions ever suffered by an industrialized nation” (“Russia defaults,” 1999).

Domestic Economies

Growth. The economic growth rates of leading countries of origin of IEP students also relate to the affordability of intensive English programs. The effect of oil production in a country is an obvious factor, as discussed earlier. Economic growth that is not directly related to oil also has had an impact on IEP enrollments, particularly the rapid growth of East and Southeast Asian economies. Between 1987 and 1997, enrollments of IEP students from South Korea, Taiwan, and Thailand grew by 989%, 524%, and 215%, respectively. The number of Japanese students in that same period increased by 92%.

The economic growth in these countries during the 1980s contributed to the enrollment growth rates. The per-capita GNPs in South Korea, Taiwan, and Thailand — all top-10 IEP “suppliers” — grew 115%, 92%, and 114%, respectively, between 1985 and 1995, while the Japanese growth rate of 29.1% was over twice that of the 14.1% growth rate in the United States (rates derived from U.S. Department of Commerce, 1998). Most students from these countries attended IEPs with personal or family funds, the availability of which is obviously linked to the health of domestic economies.

Recession. The effects of a nearly worldwide recession may help explain a leveling of IEP enrollments in much of the 1990s. Japanese IEP enrollments in 1989-90 more than tripled to 11,699 from a 1985-86 enrollment of 3,386, and they constituted 30.4% of IEP students represented in the *Open Doors 1989-90* data. While Japanese students continued to account for 22.3% of all IEP students in the 1997-98 data, the trend line for Japanese students dropped and then leveled for much of the 1990s before a sharp jump upward in 1997, as can be seen in Figure 6. While the dollar did show a 13.1% rise against the yen from 1988 through 1990 before settling back at roughly the 1988 level in 1992, part of the decline in Japanese IEP enrollment during this period can be attributed to a lengthy recession in the Japanese economy. While a stronger yen may make buying American goods and services (such as IEP enrollments) more attractive, it also slows recovery from the Japanese recession because Japanese goods become more expensive and trade imbalances favoring Japan are moderated.

Crises. Several bank failures in Japan in 1995 represent an internal economic crisis that has not, as yet, had an observable effect on IEP enrollments, though Andrews (1995) points out that these failures and general banking instability have prolonged Japan’s recession. According to one expert, Japan’s banking problems were caused by bad debts “several times the size of those that sank the American savings and loan industry in the late 1980s” (Bradsher, 1995, p. C1). Another Asian investment research expert characterizes the overall Asian banking situation as a crisis “on a scale we haven’t seen before” (“When will the economic crisis in Asia end?” 1998). The Japanese banking crisis serves as an example of a *potential* threat to the flow of students to IEPs in the United States.

Implications

Oil. The rise and fall of oil prices have had considerable effect on IEP enrollments for the last 15 years, and they should continue to influence enrollments in the future. Oil prices themselves are subject

to a number of influences beyond supply and demand. A Nigerian oil worker strike in the summer of 1994 led to a noticeable, if short-lived, increase in the price of oil. After the Gulf War, Iraq was prohibited from exporting oil, but by spring 1995 proposals had been made to loosen that policy. The Clinton administration at one point argued that such a change “would spell trouble for volatile and financially strapped exporters such as Russia and Saudi Arabia ...” (“Informed sources,” 1994, p. 20), as the price of oil could fall as low as \$11 a barrel (from a September 23, 1994 price of \$17.60; oil prices by December 1999 were over \$25 a barrel). Saudi students were the seventh largest group in IEPs in *Open Doors 1998-99*, while the number of Russian students increased at an average annual rate of 16% from 1994 to 1998. Asian and other economies moving out of the recession and crises of the late 1990s would generate a higher demand for oil, to the obvious benefit of oil-producing nations.

Oil fields are being or will be developed in regions that are relatively untapped in terms of IEP students. The development of several major oil fields in China (Salpukas, 1994a) and concomitant factors stimulating an already growing Chinese economy could lead to increased numbers of Chinese students in IEPs. Russia, already the world’s largest producer of oil, also has untapped fields for development, as do several states of the former Soviet Union. Azerbaijan has signed a “huge scale” oil deal (Salpukas, 1994b, p. C2), while Kazakhstan has been termed “the next Saudi Arabia” by an oil company manager (J. Blackwell, Personal Communication, June 17, 1994). Given that comment, it is worth noting that between 1993 and 1994 the number of IEP students from Kazakhstan increased 945% from 22 to 230, though by 1998-99 the number had dropped back to 62, reflecting difficulties in the Kazakh economy and the world oil market. Nevertheless, while the development of these new fields may not reach the proportions seen in the OPEC countries, the income they generate could provide the economic infrastructure to support new enrollment growth in IEPs. The assumption, however, would have to be that such growth would be sensitive to the fluctuations of oil markets.

Growth and recession. World and country-specific economic developments can help explain IEP enrollment trends. For example, a 350% increase in the number of IEP students from Japan, Korea, Taiwan, and Thailand between 1985 and 1997 accompanied the Asian economic boom that began in the 1980s. When Asian students comprised over three-fifths of IEP enrollment in 1997-98, the Asian economic crisis and resulting enrollment declines shook the IEP sector of commerce; even after the crisis, Asian enrollment still made up 56% in 1998. The status of Asian economies continues to demand attention when future enrollment trends are considered. One ramification of the economic influences on IEP enrollment is that the *Wall Street Journal* or *The Economist* should be considered essential reading for an IEP administrator.

In looking toward future trends, China presents a unique economic situation that gives it the potential to become a major source of IEP students far beyond its current, underrepresented level. The World Bank predicts the Chinese economy will surpass the U.S. economy as the largest in the world by 2002. Its average annual growth rate of 9% since 1978 has been three times that of the United States, and its per-capita output has doubled every 10 years (WuDunn & Kristoff, 1994). With continued development of a market economy, greater income could become available for, among other things, financing the study of English abroad, and the imbalance of the 1997-98 IEP-to-overall-international student ratio (.032) could change substantially. If the Chinese IEP-to-overall-international student ratio were to match that of the 1998 Taiwanese ratio (.114), then Chinese IEP enrollments would be 5,814 rather than the comparatively paltry 1,639 shown in the 1998-99 enrollment figures. If the 1998 Japanese ratio (.244) were attained, then Chinese IEP enrollment would surpass 12,000 students.

After Asia, Latin America constitutes the other major potential source of IEP students, but Latin American economies have been afflicted by vexing cycles of economic misfortune. In the 10 academic years between 1983-84 and 1992-93, Latin American students went from being 22.7% of all IEP students to 12.9%; indeed, there were 982 more Latin American students in 1983 than in 1992. Two academic years later, Latin American students represented 16.8% of IEP enrollment, an increase of 2,540 students, and for most of the 1990s they would continue to constitute 15-17% of all IEP students. Economic growth in the region had seemingly reversed the downward trend in the number of Latin American students in IEPs, and even counter-balanced the near-collapse of the Mexican economy, which was surely related to the 51% drop in the number of Mexican students in IEPs between 1994 and 1998. After significant improvement in a debt crisis that had plagued the region in the late 1980s and early 1990s, and with the prospect of better growth rates in the two largest Latin American economies in Mexico and Brazil (Brooke, 1994), the number of Latin American students in IEPs soared 81.3% between 1992 and 1997, a figure which includes some effects of the devaluation of the Mexican peso; the comparable rate for Asian students was 45.3%, though Asia was supplying over four times as many students in 1997.

Mexico has consistently ranked as one of the top-10 countries of origin for IEPs, and improvement in its economy, along with the effects of the North American Free Trade Agreement (NAFTA), could lead to increased numbers of Mexican students in IEPs. Obviously, though, the country's economic health, and thus its potential to support IEP students, was severely challenged after the devaluation of its currency. Furthermore, political instability, manifested in the assassinations of political party leaders and the Zapatista conflict, may inhibit U.S. investment in Mexico, slow economic improvement, and counteract the benefits of NAFTA to the Mexican economy. On the other hand, academic spin-offs to NAFTA have included discussions on the development of an educational exchange structure similar to the Erasmus program in Europe (Adelman, 1992b), and the development of a project, the Texas-Mexico Initiative, that provides in-state tuition rates for Mexican students at Texas state universities (Adelman, 1992a). Should a NAFTA-influenced Mexican economy recover and then improve, so that IEP tuition costs become manageable for a broader spectrum of Mexican students, IEPs could see slow but considerable growth in Mexican student enrollment.

Brazil also has the potential to provide IEPs with a considerable number of students, but its economic troubles have made the costs of these programs excessive for Brazilian students. Economic reforms instituted in July 1994 led to a drop in the Brazilian inflation rate, from 50% in June to a 1% rate in fall 1994. By 1998 Brazil was the fourth-leading country of origin of IEP students, providing over 5% of all IEP students (Davis, 1998). Indeed, the numbers of Brazilian students had soared 73% from the previous year. However, in an economic crisis influenced by the economic problems in Asia, Brazil devalued its currency by 50% in January 1999, a move that will no doubt negatively affect future numbers of Brazilian students in IEPs.

While it is unlikely that the oil-funded surge in Latin American enrollments of the early 1980s will be repeated, Latin America has always been the second-leading source of IEP students. However, a lag between economic growth in Latin America and growth in Latin American IEP enrollment may persist because of a continuing perception of the "expensiveness" of studying English in the United States, even after personal incomes in Latin America have reached a more supportive level.

Democracy and market economies. With the breakup of the Soviet bloc and the evolving development of market economies in Eastern and Central Europe, a unique instance of economic growth

has emerged. Since 1989, the state-run economies of that region have given way, though unevenly and not without difficulty in various countries, to economies of a more capitalist nature; several of the countries are even contemplating joining the European Union (Whitney, 1994). Perlez (1994 p. A6), however, cites analysts who predict that even those countries on the “fast track” to market economies (Poland, Hungary, and the Czech Republic) won’t reach the economic status of weaker partners in the European Union (such as Spain) until “well into the next decade.”

In Russia, which has the region’s largest economy, the ruble lost over 90% of its value against the dollar between May 1992 and October 1999 (a major “negative” for individual or family-sponsored IEP enrollment), while the annual inflation ran in the triple digits for much of the 1990s. Even with foreign investment in Russia described as “pouring into the country” in the wake of a first phase of privatization of the economy, and with U.S. direct investment possibly reaching \$50 billion in the next decade, the amounts of these investments are viewed as “only a fraction of what is needed to rebuild [Russian] industry” (Stevenson, 1994, p. C4). The level of future foreign investment, political stability, and oil revenues could moderate Russia’s rocky transition to a market economy and would, in turn, contribute to any emergence of the country as a significant country of origin of IEP students.

Although the number of IEP students from Eastern and Central Europe increased nearly fourfold between 1988 and 1998, economic causes cannot fully explain that growth, given the brief time frame. While the 1,510 students in 1998-99 constituted only 3.4% of IEP enrollment that year, the region presents an important source of new IEP students, particularly once economies develop to the point where individuals have the financial resources to support IEP studies.

With Eastern European students representing nearly 30% of all European students in IEPs in 1998 (as opposed to 19% in 1992), Europe has since 1988 generally surpassed the Middle East as the third-leading region of origin for IEP students. With the expansion of educational exchange programs in Europe (discussed later under “The Effects of Educational Policy and Social Change”) and linguistic and program competition from Great Britain, it is questionable whether IEPs in the United States will continue to draw the same numbers of European students, particularly during more difficult economic times.

Trade. Trade agreements and a nation’s trading status with the United States can also be considered secondary influences on the movement of students to U.S. IEPs. President Clinton threatened to implement trade sanctions if Japan and the United States had not reached a last-minute, partial trading agreement in late September 1994 (Friedman, 1994). Such sanctions could have led to a trade war with Japan, which might have resulted in an attitudinal souring of Japanese students on the prospects of studying in an “unfriendly” United States. Similarly, the prospect of trade sanctions and the question of “most favored nation” trading status have arisen periodically with China as well. It is not inconceivable that the United States and these nations will continue having differences over trading practices, with potentially negative impacts on IEP enrollments. Conversely, the 1999 negotiations to admit China to the World Trade Organization may bring about considerable benefits for future IEP enrollments; the membership arrangement could lead to free market development and to economic liberalization and growth, which could in turn facilitate family and personal financial support of IEP enrollment.

Political Developments

The most spectacular effect of international politics on IEP enrollment occurred with the Iranian Revolution in 1979 and the resultant 80% drop in the number of Iranian students in IEPs the following fall. Several other events have had a noticeable, if not as severe, effect on IEP enrollment and are discussed here.

The establishment of cultural relations with China. The resumption of formal diplomatic relations between the United States and China led to an influx of Chinese students in the early 1980s. In 1980 there were 493 Chinese students in IEPs, enough for China to make the top-10 list of countries of origin; a year later, the number had grown to 1,375. Though the number of Chinese students declined in the 1990s until a resurgence to 1,356 in 1997, China has remained an important country of origin for IEP students.

The post-Cold War era. As mentioned, the breakup of the Soviet Union and the establishment of democracies in Eastern and Central Europe have created new markets for IEP students. This shifting of political boundaries has also started an educational gold rush, as U.S. institutions and organizations have moved to establish academic relations in a region of the world that in the past was the source of relatively few students (in 1980-81, 0.5% of all international students in the United States came from Eastern or Central Europe). In addition to the astounding percentage increases in the number of students coming to the United States from the region, the establishment there of American universities, such as the American University of Blagoevgrad in Bulgaria and the American University of Armenia, has created additional educational and language links to the United States.

The U.S. government also focused educational attention on the former Soviet bloc:

- In 1992 the United States Information Agency (USIA) provided \$770,000 for the Baltic/East Central European Assistance Awards Program (B/EEP), which was administered by NAFSA: AIE. The B/EEP was designed to support students from 14 Baltic and East European countries in their studies in the United States (Kennedy, 1992).
- Between 1993 and 1998, the USIA-funded Russian and Eurasian Awards Program provided \$10.4 million to support the studies in the United States of nearly 700 students from Russia and the Newly Independent States (NIS; NAFSA: Association of International Educators, 1999).
- In September 1993 President Clinton signed into law a package that included \$225 million for educational exchange programs with the Newly Independent States.

The Soros Foundation is an example of private funding going into the former Soviet Bloc. Among its activities are the Soros Professional English Language Teaching Program (SPELT) and the Soros English Language Program (SELP), which provide both teachers, programs, and infrastructure for English language teaching in the region, and which were funded at approximately \$993,000 in 1997 (Soros Foundation Network, 1999). The Soros Foundation also funds the Central European University in Budapest.

As a result of such programs and the opening of educational opportunities in general, enrollments of students from former Soviet bloc countries in U.S. schools have increased from 2,460 in 1988-89 to 24,328 in 1998-99, a 889% increase. Indeed, *Open Doors 1992-93* data included dizzying percentage changes from the previous year in the hundreds, thousands, and even ten-thousands as students arrived from countries that formerly sent few, if any, students or that did not even exist as separate states three or four years earlier.

IEP enrollments have also reflected marked increases in the number of students from the former Soviet bloc. Eastern and Central European and NIS student IEP enrollments went from 378 in 1988 to 1,707 in 1998, a 352% increase, which was significant though not in symmetry with the increase in general student enrollments from the region. Again, the high cost density of IEP enrollment may be inhibiting parallel growth. Nevertheless, the region certainly presents a potential growth source for IEP enrollments.

The great demand for English, as Russian falls from its position as the major language of the former Soviet bloc countries, favors continued increases in the number of students undertaking intensive English studies in the United States. In addition to the American universities, Budapest Technical University is offering bachelor's and master's of science degrees in English ("Information exchange," 1994), while in Latvia, English has been described as experiencing a "boom time" ("International update," 1993, p. 25). The USIA was sending 46 specialists in teaching English as a foreign language (EFL) to Central and Eastern Europe in 1992 to train 4,000 English teachers ("News Bits," 1992b), the Soros Foundation has been sending both English teachers and teacher trainers to the region, and the Peace Corps has expanded its services into the region by sending volunteers to serve as EFL teachers and teacher trainers. The links created by these undertakings should encourage an orientation toward American English, American institutions in the region, and U.S. universities and IEPs, though Western European responses to the "opening" of Eastern and Central Europe may possibly deflect some of that flow.

The Gulf War. While the Gulf War in 1990 no doubt had a negative impact on the number of Iraqi students signing up for IEPs (in 1997 overall Iraqi student enrollment in U.S. schools was roughly a fifth of what it was in 1989), Iraqis were not particularly numerous in English programs to begin with, given the prior cool relations between Iraq and the United States. However, following the war the number of Saudi students did increase, either due to the subsequent rise in the price of oil, which can be directly related to the war and the embargo against Iraq, or perhaps due to an oblique gesture of thanks from the Saudi government. *Educational Associate* cites a *Chronicle of Higher Education* report which states that Kuwait was considering sending about 5,000 students to U.S. schools if Kuwait University was not rebuilt quickly enough ("News Bits," 1991). While that number of students has not appeared, Kuwaiti students in U.S. IEPs did increase by 41% in 1992-93.

The war may also be a partial cause in the decline of Jordanian students in U.S. schools. Overall, Jordanian student numbers have dropped over 60% since 1989, perhaps due to the disruption of the Jordanian economy by the embargo against Iraq, along with the decrease in economic assistance from Saudi Arabia and Kuwait after Jordan supported Iraq during the war. On a more general level, anti-American sentiments in the Middle East, reinforced by the involvement and even the stationing of U.S. military forces in the region, are unlikely to promote student movements toward American educational institutions.

Refugee movements. Until 1991 refugees were included in the *Open Doors* data on both general and IEP student enrollments. Their presence accounted for 2.4% of overall international student enrollment, but nearly 8% of total IEP enrollment, in 1989-90, when 2,688 IEP students were classified as refugees. Indeed, there were enough Vietnamese students in IEPs in the 10 academic years from 1981-82 to 1989-90 that Vietnam achieved top-10 status as a country of origin for IEP students five times.

Although refugees are often exempt from university TOEFL requirements, and despite the fact that the TOEFL test was not administered in Vietnam between 1975 and May 1994 (Gillotte, 1994), the *TOEFL Test and Score Manual Supplement* (Educational Testing Service, 1994) indicates that at least 6,581 Vietnamese speakers took the TOEFL test between July 1991 and June 1993. The 1998-99 edition of the *TOEFL Test and Score Data Summary* (Educational Testing Service, 1999) lists 3,251 examinees from Vietnam in a single testing year, which makes the number of Vietnamese examinees higher than the number of examinees from Peru, Norway, and Israel, for example. Also, since many IEPs use the TOEFL Institutional Testing Program for evaluation, the number of refugees in IEPs can have an impact on that program. Refugee and other immigrant student movements to the United States, while not a major tidal wave, have created noticeable swells in IEP enrollments and in TOEFL administrations.

Internal national politics. The assassinations of Mexico's Institutional Revolutionary Party presidential candidate in March 1994, and then of the party's secretary general six months later, along with the 1994 Zapatista guerrilla uprising, may not have had any observable, direct effect on IEP enrollments, but such events undercut investor confidence in Mexico's economy and could thus inhibit the long-term economic improvement necessary for individuals to afford IEP enrollment. Political unrest in a country, particularly when it creates armed conflict, obviously has the potential of restricting and even interrupting the flow of students to the United States. However, until the paths of departure are fully blocked, internal instability involving military responses (uprisings, insurgencies, civil wars) can also generate a movement of students to safety. One IEP director observes that political unrest often leads to increased IEP enrollment of younger, more affluent students (A. Blackwell, Personal Communication, September 7, 1994). The 17,800% increase in general enrollment by students from Croatia between 1991 and 1992 may be an example of this (though the increase in raw numbers was from one to 179 students).

Implications

As with economic developments that affect IEP enrollments, events of a political nature are not subject to accurate prediction. However, several situations "loom" that could lead to shifts in IEP populations.

Korea. The cover of the June 20, 1994 issue of *U.S. News and World Report* was headlined "Korea: The Next War?" The cover story on Korea, which was written before the death of Kim II Sung, was entitled, "The Most Dangerous Place on Earth" (Galloway & Auster). While tensions eased somewhat during the summer of 1994, the continued controversy over the inspection of North Korea's nuclear plants, exacerbated by questions created by the death of Kim II Sung, has not been resolved. A spring 1996 news report on a defecting North Korean pilot noted the high state of military readiness in North Korea and raised the possibility of an invasion of South Korea as the "last resort of a collapsing regime" (Scanlon, 1996).

Any renewal of armed conflict on the Korean peninsula would obviously have a direct, dramatically negative, and long-term effect on South Korea's status as the second largest source of IEP students (12.5% of all IEP students in 1998-99, down from 22.4% before the Asian Crisis). Most likely, it would also severely interfere with the flow of students from the other Asian countries that comprise, along with South Korea, four of the top-10 leading countries of origin for IEP students listed in *Open Doors 1997-98*. North Korea, for example, implied in 1994 that it would retaliate against any Japanese support of economic sanctions against it. While China is unlikely to support North Korea as it did in the 1950s (Galloway & Auster, 1994), war would definitely, and increased tensions might, disrupt the U.S. study plans of Chinese, Taiwanese, Korean, and Japanese students.

Taiwan. Tensions between China and Taiwan rose in the spring of 1996 and again in the summer of 1999 over Taiwan's status as a province of China and Chinese naval maneuvers off the coast of Taiwan. As is the case with South Korea, the possibility of conflict, or at least instability, exists for Taiwan, which was a top-five leading source of IEP students in the 1990s. However, if Taiwan were to be reinstated as a province of China, China's "market share" of IEP enrollments, including students from Hong Kong and Macao, would increase from 3.7% to almost 13%, based on *Open Doors 1998-99* data.

Hong Kong. Hong Kong has not been a major source of IEP students, even though it has been a perennial top-10 country of origin for degree-seeking international students in the United States, and the TOEFL mean score for examinees from Hong Kong in the latest testing period matched that of examinees from South Korea (the leading source of IEP students), according to Educational Testing Service (ETS®) data (1999). The end of British authority in Hong Kong in 1997 and the resultant diminished English-language and academic influences may lead to increased IEP enrollments of students from Hong Kong.

The former Soviet bloc. Continued access to American, university-level education and increasing interest in learning English, in conjunction with developing market economies and incomes derived from natural resources, should lead to constant and perhaps substantial growth in the number of IEP students from East and Central Europe and the NIS over the course of the next 15-20 years. Whereas Western Europe supplied about 8% of all IEP students in 1998-99, it is questionable whether the Eastern and Central Europe and the NIS will supply an equal proportion of IEP students within the next 20 years or so without substantial government and private support. Peter Havlik (cited in Perlez, 1994, p. A6), deputy director of the Vienna Institute for Comparative Economic Studies, projects that even at most-optimistic levels of economic growth, "it would be 2010 before the Czech Republic would reach the per-capita gross domestic product of Spain." (Only in 1992-93 and in 1993-94 was Spain ever ranked as a top-10 source of IEP students, with 2.1% and 1.7% shares, respectively, of total IEP enrollment; by 1998, Spanish students made up 1.0% of all IEP students, with 441 students.) Given the characterization of the Czech Republic as one of the more successful former Soviet bloc countries in the movement toward a market economy (Perlez, 1994), the prospect of Eastern and Central Europe developing into major sources of IEP students soon seems slight.

Cuba. A post-Castro Cuba would probably produce an appreciable flow of Cuban students and educational funding from the U.S. government, something similar to what happened in the former Soviet bloc. The high cost of IEP study would be a barrier for Cubans with their current low per-capita income, but financial support from the sizable Cuban-American community in the United States could offset some of the cost burdens. It would also not be surprising if, upon the establishment of a "more

acceptable” government in Cuba, the U.S. government developed educational support and scholarship programs similar to those created after the breakup of the Soviet Union.

The Arabian Gulf. The decade-long conflict with Iraq cannot be viewed as positive for IEP enrollments. Any resumption of the military conflict there would have an immediate impact on oil prices, and the severity of any conflict would affect the duration of that impact. With Middle Eastern students accounting for 10% of IEP enrollments in 1998-99, another war in the region would certainly affect IEP numbers, at least in the short term. The eventual lifting of the trade embargo against Iraq, a political/diplomatic decision, could lead to a substantial drop in oil prices, since Iraq would then be able to begin exporting oil (“Informed sources,” 1994). Given the difficult economic situation that has resulted from the embargo (Socolovsky, 1994), it seems likely that Iraq would pump and export as much oil as possible in an attempt to rebuild its economy. While the reduction of tensions in the region might encourage the flow of IEP students, a substantial drop in oil prices and a subsequent drop in national incomes could potentially counterbalance any increases.

Southeast Asia. The development of diplomatic, trade, and educational exchange relationships between the United States and Vietnam and Cambodia presents the possibility that students from Vietnam will enroll in IEPs. Gillotte (1994) quotes a Vietnamese education ministry official speaking of the high level of interest in English among Vietnamese students, and *Educational Associate* (“International update,” 1993) reports that Cambodian students at the Institute of Technology protested in favor of English over French as the language of instruction. However, in a country like Vietnam, where the current average monthly income is about \$20 (Asian Development Bank, cited in Gillotte, 1994), the costs of IEP studies would be out of the reach of most students without some form of assistance, like government grants or support, from the Vietnamese-American community. It is worth noting that Vietnamese student enrollments in IEPs increased from 47 to 385 between 1994 and 1997 before dropping to 346 in 1998, and had already surpassed the declining Malaysian student enrollments to become the third leading source of students from Southeast Asia (behind Thailand and Indonesia).

Miscellaneous. A number of other political developments could have influences, though perhaps slight, on IEP enrollments. These developments include the continuing issue of Quebec separatism; the easing of tensions and even the expanded establishment of diplomatic relations between Israel and the Arab nations; the establishment of Palestinian self-rule; the effects of the Islamic fundamentalism movement in the Middle East, North Africa, and Central Asia; and the possibility of peace and economic recovery in Lebanon, which was once a top-10 source of IEP students.

The Effects of Educational Policy and Social Change

A third category of influences on IEP enrollment falls within the domain of educational policy and social changes, most often those related to trends and developments in other countries, but occasionally connected to circumstances in the United States.

Shifts in national educational policy. In 1981-82, the number of Malaysian students in IEPs in the United States shot up by 898.3% as the Malaysian government instituted a program for educating students in the United States. The following year the number increased by 37%, making Malaysia the fourth largest source of IEP students in 1982-83 with 1,655 students. In 1983-84 the number dropped to 995, a 39.9% decrease (in a year where overall IEP enrollment dropped 21.1%), and by 1984-85,

Malaysia had dropped off the top-10 list with fewer than the 740 students of 10th-ranked Venezuela. In 1992-93 Malaysian students numbered only 187 (in 1997 the number had increased to 264 before plummeting to 66 in 1998).

The flash-in-the-pan nature of increased Malaysian student enrollment in IEPs resulted from a reversal of the policy that initially sent students to study English in the United States. For language learning and cultural adjustment reasons, it was decided that many Malaysian students would undertake language studies, if needed, and even junior-college-level academic work, at branch campuses of American institutions in Malaysia, with students then transferring to U.S. colleges and universities to complete their degrees. As a result, Malaysia continues to rank in the top-10 for producing high numbers of international students in general (11,557 in 1998-99), even though the numbers of Malaysian students at IEPs approached insignificance in 1998 (0.015% of all IEP students, though 0.5% before the Asian economic crisis). Malaysian students, then, continue to form an important market group for the TOEFL test; only 15 other countries totaled more examinees than Malaysia on the data reported in the *TOEFL Test and Score Data Summary* (Educational Testing Service, 1999). This market group, however, may be affected in the future by the establishment of branches of Australian and British universities in Malaysia (“Dispatch Case,” 1999a).

In March 1999 the Korean government mandated that all Korean university students must take two years of English as a requirement for graduation (Hicks, 1999). The implementation of this policy may result in a reduction in the number of Korean graduate students in IEPs, or at least in a shortening of their sojourns in language programs. In 1997-98 just over 44% of Korean students seeking degrees in the United States were classified as graduate students (Davis, 1998). In that academic year, Korea ranked as the leading country of origin of IEP students with 12,128 students. The university English policy, then, would have had a potential impact on over 5,300 IEP students. Even in 1998, after the dramatic 54% drop in the number of Korean students in IEPs to 5,488 following the Asian economic crisis in 1997-98, the policy would have affected over 2,400 students, a number that would have earned a fifth-place ranking in the 1998 list of leading countries of origin of IEP students.

Another example of how educational policy can affect IEP enrollments has occurred in China. In what Hertling (1996) calls “perhaps the most ambitious language-learning campaign in history” (A49), China has established an English requirement, complete with competency examination, as an exit criterion at many universities, which perhaps partially explains the relatively reduced presence of Chinese students in IEPs in the United States. In Hertling’s article it is pointed out that the skills and motivation developed to pass the English examination help Chinese students succeed on the TOEFL test as well, though it is also pointed out that both English instruction and the English examination in China emphasize neither comprehension nor spoken comprehensibility.

The Malaysian model. The establishment of American universities and branch campuses of American institutions in other countries, as has been done in Malaysia, is not a particularly new approach. The Temple University branch in Japan is a long-standing example. Intensive English generally represents a substantial component of such programs. The Temple program in Japan, for example, had 800 students enrolled in its intensive English program in 1989, which would have made it the fourth largest IEP among those in the United States (“News Bits,” 1989b). In the late 1980s an explosion of interest (and students) led to over 130 U.S. universities, colleges, and community colleges expressing interest in establishing programs in Japan (“News Bits”, 1989b); eventually over 20 did establish programs there

(Rubin, 1996). However, due to declining enrollments, problems in the Japanese economy, and difficulties in gaining official recognition from the Japanese government, the number of branch campuses in Japan had dropped to 11 by 1996.

In giving permission for the establishment of independent colleges and universities in Shanghai and Guangzhou, China has unleashed a “flood of applications from other schools, including foreign branch campuses of schools in the United States, Canada, and Australia” (“International update,” 1994, p. 20). Should these independent colleges and universities materialize in China, tremendous potential for in-country intensive and semi-intensive programs exists, since such programs would be able to mitigate the cost of IEP study in the United States.

Though not exactly in the same category, the development in other countries of private universities that use English as the medium of instruction may also deflect enrollment from universities and IEPs in the United States. Bilkent, Sabanci, and Koc Universities in Turkey, Prince Sultan Private College in Saudi Arabia, the American University of Blagoevgrad in Bulgaria, Zayed University in the United Arab Emirates, and the American University of Armenia have joined more established English-medium institutions, such as the American University of Cairo and the American University of Lebanon, in providing these alternatives to study in an English-speaking country.

Also, in 1999, Sylvan Learning Systems, best known in IEP circles for its administration of computer-based TOEFL tests, announced its intention to “acquire and build a global university presence” through a network of private universities (Lively & Blumenstyk, 1999, p. A43). While initial plans did not outline whether the institutions would employ English as the medium of instruction, the creation of American-style universities in other countries could divert students from study in the United States. In addition, Sylvan is already involved in intensive English instruction through its Aspect subsidiary and thus could expand its overseas intensive programs through its university network.

The “reverse” model. While many U.S. institutions sought to establish branches in Japan, private Japanese schools were also setting up programs in the United States. The Teikyo University of Japan, for example, set up four campuses in the United States, though not without controversy, including accreditation difficulties (Nicklin, 1994, and “Accreditor warns,” 1994). In one instance, an English language school in Japan “leased” an American college for 30 years (“News Bits,” 1989a). Intensive English programs have generally been a major aspect of these overseas operations of Japanese educational institutions.

Growth in overseas English programs. The number of intensive, semi-intensive, and nonintensive language programs and TOEFL programs outside the United States appears to have increased considerably during the 1990s, though accessible data to support that assertion are rare. One indicator is the 39.9% growth in the number of TOEFL administrations given through the Overseas Institutional Testing Program between the 1993-94 and 1997-98 testing years (Educational Testing Service, 1998). Over the same period, the domestic Institutional Testing Program experienced a 22.5% increase, and the registered Friday-Saturday TOEFL overseas programs grew at a 23.7% rate. The marked growth of the Overseas Institutional Testing Program suggests an upward shift in the number of language programs and in the number of students they enroll.

Japan alone accounted for over half of the 146,600 Overseas Institutional Testing Program administrations in 1993-94. T. Robb (Personal Communication, October 18, 1994) estimates that over 1,000 private language schools operated at that time in Japan, in addition to about 600 junior colleges and university programs and uncounted “jukus,” or cram schools, many of which offer TOEFL preparation courses. South Korea has also experienced a similar boom in English instruction. Expanded and/or improved English instruction “at home,” whether it is part of secondary school curricula, university-level studies, or private school offerings, does not necessarily preclude further study at an IEP in the United States for an international student seeking a degree, but it should contribute to a shorter stay at the IEP, and thus to greater turnover of students throughout the year.

Percentage of other government-sponsored students. In 1979-80, home governments and universities sponsored 13% of international students in their general studies; in 1997-98, the percentage of sponsored students was down to 5.9%. This decline is significant in that it means individuals and families are increasingly faced with the costs associated with IEP study; U.S. colleges and universities, which provided 18% of funds for academic study in 1997-98 (particularly for studies at the graduate level), rarely do so for IEP studies.

The decline in the percentage of government-sponsored students is linked to the drop in oil prices and subsequent decrease in the number of students from OPEC countries studying in the United States. Governments that have continued or begun to sponsor students for study in the United States have tended to become more judicious in their allocation of funds for IEP study. Turkey, for example, limited the study of English to two semesters within a program that was projected to send 7,000 students abroad between 1993 and 2000 (of 1,300 students the first year, 84.6% went to the United States; Whitten & Onulduran, 1994). Turkish student enrollment in IEPs did increase 73% between 1992 and 1998, with Turkey becoming a top-10 country of origin in 1998.

The end of the relatively open-ended English studies that characterized the late 1970s and early 1980s has several implications. First, lengthy sojourns by sponsored students at an IEP are much less common due to “term limitations” set by sponsors. Furthermore, home institutions, private sponsors, and governments tend to be more interested in screening applicants for sponsored English studies in the United States by requiring minimal TOEFL scores for eligibility. This screening translates into more use of the TOEFL test abroad and may partially explain the growth of the Institutional Testing Program, as well as the expansion of intensive and semi-intensive programs at home. Turnover within IEPs, then, may be greater than it was in the 1970s and early 1980s, with fewer repeated enrollments by students over several IEP sessions. Students whose original purpose for coming to the United States centers on the pursuit of an academic degree now tend to arrive with higher proficiencies than they did 10-15 years ago, meaning, again, a trend toward fewer repeat enrollments in an IEP. The increase of the total group mean TOEFL score from 517 in 1991 (Educational Testing Service, 1992) to 532 in 1998 (Educational Testing Service, 1999) also suggests a changing need for English instruction. In addition, funding of language studies for a spouse is less common than it was in the “OPECian days” of the late 1970s and early 1980s.

Undergraduate and graduate student ratios. In 1980-81 undergraduates (associate’s and bachelor’s degree candidates) comprised 60.2% of the international students in the United States; by 1997-98 that percentage had dropped to 48.1%, and the market share of graduate students had increased from 32.9% to 43.9%. ETS data on TOEFL candidates’ self-reported reasons for taking the TOEFL test (Taylor, 1994)

show that, prior to 1984, more undergraduate than graduate students were taking the test, but since 1984 the ratio has been reversed. During the July 1997 to June 1998 testing period, 47.2% of the candidates reported taking the test for graduate admissions, while 34.2% indicated they took it for undergraduate admissions (Educational Testing Service, 1999).

From an English instruction perspective, graduate students have potentially had greater opportunity to study English prior to their coming to the United States and may therefore need shorter sojourns in an intensive English program; it might also be assumed that graduate students have a greater sense of purpose to their studies and therefore greater motivation to acquire the language. The 1997-98 edition of the *TOEFL Test and Score Data Summary* (Educational Testing Service, 1999) shows that the mean total scaled score for graduate students was 543 for graduate students and 521 for undergraduate students, which suggests a somewhat reduced need for language instruction among graduate students.

University capacity. The United States can provide educational experiences for students from those countries experiencing either a shortage of seats in universities in general or in specific fields of study (O'Connell, 1994). Turkey, for example, could admit less than half of the high school students who qualified for admission to university studies in 1992 ("International update," 1993, Summer), and the Turkish government's sponsoring of study abroad for roughly 1,000 students a year is no doubt related to that university capacity problem. A similar situation exists in China, where about 10% of secondary-school graduates gain university admission. However, China plans to expand that percentage to 15% by 2010, in part to divert funds that might otherwise have gone abroad into the Chinese economy (Plafker, 1999). From an IEP perspective, the plan might also divert students from English programs in the United States.

Study in the United States offers a possible, if only partial, solution to national university space problems and in turn entails language preparation and testing either in the country of origin or in the United States. U.S. colleges and universities can also provide access to postsecondary studies for students from countries where admission to a national university is highly competitive, such as Japan. In 1997-98, 68% of the Japanese students in the United States were studying at the undergraduate level; many probably would not have come if they had been admitted to a Japanese university.

The development of postsecondary education opportunities in other countries, on the other hand, presents the potential for a diminished flow of international students to U.S. universities and IEPs. Adelman (1989) suggests that the growth of private universities in Latin America has impacted the flow of students to the United States at the undergraduate level, although he concedes that some offset may occur once more graduate students undertake studies in the United States.

Only-English study in the United States. While data are difficult to collect on the issue, during the 1990s more students seem to have been enrolling in IEPs with no intention of pursuing further academic studies in the United States. Indeed, some IEP programs, particularly in the private sector, have been established with nonacademic students of English as their primary clientele. An English-while-on-vacation theme often characterizes these programs. Language-only students tend to be less interested in the TOEFL test and its role in the college admission process. However, many such students become "accidental students" after they begin intensive English studies in the United States (i.e., they decide to pursue academic studies) and have a change of perspective towards optional administrations of the TOEFL test.

Changes in attitudes about study in the United States. Concerns about personal safety in the United States have had a negative impact in the past on the number of Japanese students that study English in the United States. “It is difficult to imagine the impact in Japan” of the shooting of Yoshihiro Hattori in Louisiana in 1992 (S. Pickett, Personal Communication, September 6, 1994). Indeed, Nossiter (1994) points out that the criminal trial concerning Mr. Hattori’s killing was “covered intensely by the Japanese media” and that they “still constituted a substantial presence at the civil court trial” in 1994 (p. A7). The killing of two Japanese students during a carjacking in 1994 in Los Angeles further reinforced the image of a dangerous United States, as did the killings in 1993 and 1994 of tourists in Florida. Harshbarger, an IEP director, reports that Internet communication among IEP directors pointed to numerous cancellations, particularly from Japan, due to concerns over safety during the summer prior to the 1994 fall semester (Personal Communication, July 11, 1994). Another IEP director, A. Blackwell (Personal Communication, September 7, 1994) reports that a colleague at a Japanese women’s university in Tokyo had trouble recruiting students to come to the United States on a university-related study-abroad program due to similar concerns about personal safety; the students preferred to go to London or Australia, which they perceived as safer destinations. While memory of these specific incidents may fade, other events, such as the shootings of Asian-Americans near the University of Illinois and the killing of a Korean graduate student at Indiana University by an alleged White supremacist in June 1999, could contribute to an ongoing image of the United States as a less-than-safe place for international students.

In another development involving Japanese students, R. Jenks (Personal Communication, September 7, 1994) suggests that intergenerational conflicts in Japan are reaching the point that the social stigma of not gaining admittance to a Japanese university has decreased. Thus the pressure to study English in the United States as camouflage for not getting into a Japanese school has lessened. If this sociocultural attitude spreads, it could mean another reason for decline in Japanese student enrollment in IEPs, as many of the Japanese students that enrolled in U.S. intensive programs in recent years did not arrive intending to pursue a degree.

Demographic Changes

Japan. Because Japan in the 1990s was the country of origin for over a fifth of IEP students, changes in Japanese society, like the possible attitude shift mentioned above, have the potential for considerable impact on IEP enrollment trends. For example, 12.1% of the Japanese population was over 65 years old in 1990; by 2010, that percentage will rise to 21.3% (the U.S. population change will be from 12.6% to 12.8%; Pollack, 1994). The aging of the Japanese population over the next 15 years means fewer prospective students, and Japanese universities and colleges were already competing for students in the early 1990s (“News Bits,” 1992c). Such competition could lead to a relaxing of entrance standards to Japanese universities and a further reduction of the diminishing pool of IEP-aged students in Japan. Indeed, Rubin (1996) cites the shrinking college-age population and resultant competition from Japanese universities as one of the causes for the 1995 closings of branch campuses in Japan by three U.S. universities. The demographic change also has implications for economic issues, such as trade surpluses and savings rates (Pollack, 1994), that can affect IEP enrollment trends.

Other countries. The populations of Brazil and Indonesia, for example, are projected to increase by 40% between 1995 and 2025, while Mexico is expected to become the 10th most populous country in the world during that time span (McDonald, 1996). All three countries have been major countries of origin

for IEP students in the past, and assuming that adequate economic development accompanies their population growths, would send proportionally more students to the United States in the future.

United States. If college and university enrollment in the United States were to drop, then the enrollment of international students could serve as a way to supplement a declining student population, which would in turn have an impact on IEP enrollments. However, the projections for 2009 show an 11.8% increase in college enrollment in the United States over 1998 (“The Nation,” 1999).

Competition from other anglophone countries. Evidence exists that other English-speaking countries are siphoning off students who might have otherwise come to the United States or Canada for both intensive English and academic studies. According to data in *Open Doors 1997-1998* (Davis, 1998) and in the *UNESCO Statistical Yearbook 1995* (United Nations Educational, Scientific, and Cultural Organization, 1995), the percentage of students studying abroad on a world-wide basis who study in the United States dropped from 37.3% to 30.2% between 1984 and 1995. More interestingly (in terms of potential IEP enrollments of students studying in the United States, United Kingdom, and Australia), the percentage studying in the United States also dropped seven points from 1984 to 1993, the last year for which comparable data were available at the time of publication.

On a source-country level of analysis, however, the situation remains quite positive for the United States: Of the students from China, Japan, and Korea studying in the United States, the United Kingdom, or Australia, over 89% pursued studies in the United States in 1993 (UNESCO Institute for Statistics, Personal Communication, September 21, 1999). (UNESCO data for China include Taiwan, thus somewhat influencing the implications of these numbers for IEP enrollments; *Open Doors* data for 1993 indicate that Taiwanese students would account for about 46% of the UNESCO data for China.) Together, Japan, Korea, and China/Taiwan accounted for 54.6% of IEP enrollment in 1997-98.

Stan Pickett, the president of American Language Academy (Personal Communication, September 6, 1994), feels that Great Britain, Canada, Australia, and New Zealand are “nipping at our heels” in terms of attracting students to study English, and that we are fighting a “losing battle” because of their governments’ support of both instruction in English as a second language (ESL) and international students in general. Davis (1995, p. 78) also comments that “the higher education institutions in the United Kingdom, Australia, and Canada are becoming increasingly active in recruiting students from the Asian area.” Data that compare the United States and other anglophone countries also provide support for Pickett’s contention. Greenaway and Tuck (1995) comment on the “dramatic growth” in the number of international students in the United Kingdom from 1983 to 1992. An analysis of data from UNESCO (UNESCO Institute for Statistics, Personal Communication, September 21, 1999; UNESCO, 1995, 1997) shows that, while the numbers of international students in the United States rose 32% from 1985 to 1995, the numbers increased 197% in the United Kingdom and 267% in Australia. By 1998, estimates of the international student population enrolled in Australian universities (Maslen, 1999) suggested that an additional 25% increase had occurred in the ensuing three years; in the United States the increase for that period was just over 6%. Interestingly, a big part of the increase in foreign student enrollments in Australian universities is attributed to an estimated 26,000 students in “off-shore” programs, which Australian schools offer in other countries (Maslen, 1999, p. A55). In 1998, Maslen reports that Australian universities were offering 390 off-shore programs; these entailed a “twinning” arrangement in which students studied for one or two years at their Asian institution before finishing their degrees at an Australian university.

Continued increases are anticipated. A 1995 Australian university report predicted that “Australian universities can expect to see a *fivefold* [italics added] increase in fee-paying foreign students over the next 15 years” (Maslen, 1995, p. A42), with more than 200,000 international students expected by 2010. In 1999 Maslen notes that “some institutions [had] reported international-enrollment gains of up to 40%” for the 1999 academic year, and suggested that although IEPs had been negatively affected by the Asian Crisis, Australian universities had emerged relatively unscathed (p. A55).

The increases in overall foreign student enrollment, however, should positively influence Australian IEP enrollment as well. In 1999, an initiative sponsored by the British government aimed to increase foreign student enrollment in British universities by 25% by 2005 (“British government,” 1999) — a move which would similarly benefit English program enrollment. While in the late 1990s the United States has instituted stricter immigration policies towards international students, Britain, Australia, New Zealand, and Canada have all proposed relaxed policies, making it possible for foreign students to work in some of those countries, for example, and even, in the case of Australia, to become citizens. While Desruisseaux (1999) reports that efforts to expand foreign student enrollments at Canadian universities in general had not been successful, he does point out that “Canada has had success in attracting more foreign students to shorter, nondegree programs, of which those in English-language training and business have been the most popular” and that between 1996 and 1999 “enrollment in such programs had tripled, from 6,300 students to 17,600” (p. A59).

The shifts of student populations, even though they may be slight in terms of the actual numbers of students, reflect the increased competition for potential IEP students among English-speaking countries. The Australian government, according to Pickett (Personal Communication, September 6, 1994), was providing \$65,000 in marketing support for a new English program, a policy that gives some insight into the nature of the competition. Australian universities have, along with U.S. institutions, expressed interest in setting up branch campuses in China, and the University of Canberra has hosted 40 Vietnamese English teachers and students each year since 1985 (Hung, 1994), which gives that institution a considerable head start over U.S. institutions in re-entering academic relations with Vietnam.

Allan Goodman, president of the Institute of International Education, points out that not only have other English-speaking countries increased their efforts to recruit international students, but France and Germany have also established similar recruitment initiatives, with Germany even offering more graduate programs delivered in English (1999). Concerns over the declining U.S. market share of international students led to the formation in 1999 of the Committee on American Leadership in International Education, comprised of representatives from higher education, the government, and private groups. The goal of the new organization is to formulate and coordinate a U.S. response to increased competition from other countries (“Dispatch Case,” 1999b).

Regional academic mobility programs. In Europe, the establishment of the Erasmus and Lingua (under a larger administrative umbrella named Socrates), Tempus, and Leonardo da Vinci exchange programs by the European Union has facilitated both academic and language study abroad among students from European countries and has perhaps diverted students from the United States. Tugend (1998) cites data showing that almost 85,000 European students participated in the university-oriented Erasmus program in 1995-96; in contrast, *Open Doors* data for that academic year showed that 67,358 European students (a figure that would include students from outside the European Union and hence not eligible to participate in the Erasmus program) were studying in the United States. Of particular

relevance to study in an English-speaking country, and thus to IEPs, Tugend's article focuses on the point that the United Kingdom was drawing over 25% of the Erasmus student traffic. The Tempus program, which involves university cooperation in Eastern and Central Europe and in the Newly Independent States of the former Soviet Union, had over 500 projects in Eastern Europe and established 77 programs in the countries of the former Soviet Union in the first three months of 1994 ("Dispatch case," 1994).

Though European student enrollments in IEPs increased an average 7% per year between 1990 and 1998, these European programs offer attractive alternatives to academic and language study in the United States. For example, students in these programs can benefit from tuition waivers and other financial support for study abroad in participating countries. As these programs and projects expand and take root, it will be interesting to track the effect on both the overall international student enrollment and IEP student enrollment in the United States.

Implications

As with economic and political influences, educational and social influences on IEP enrollments interact with other categories of influences. In some instances, the forces counteract each other. For example, the favorable exchange rate that should encourage increased Japanese IEP enrollment may be countered by Japanese concerns about safety in the United States. The influences discussed in this section may not be as potent as those in the economic and political spheres, but their cumulative and interactive values should be considered in predicting (or at least explaining) IEP enrollment trends.

Decline in number of Japanese students. Demographics, changing attitudes and educational circumstances in Japan, and possibly concerns about personal safety in the United States are among the forces likely to lead to a decline in, or at least a leveling of, the number of Japanese students in IEPs in the United States. While enrollments in English language programs in Japan may remain strong, any downward shift in IEP enrollment by Japanese students has considerable significance, given the proportion of total IEP enrollment that the Japanese constituted in the 1990s.

Competition. Competition against IEPs in the United States may take the form of language programs in the "home country," language programs in other English-speaking countries, regional mobility programs for study abroad, distance and online educational opportunities, and expanded or liberalized postsecondary opportunities at home, all of which will continue to divert potential students away from IEPs in the United States. The branch-program approach (the Malaysian model) also deflects students from enrolling in IEPs in the United States.

On the other hand, the number of students worldwide who are studying in other countries has increased since 1980, according to UNESCO data (UNESCO, 1995, 1997, 1999; though Davis, 1995, outlines weaknesses in the accounting procedures used in the *Statistical Yearbook*). The Australian report cited earlier (Maslen, 1995) projects that the number of students worldwide studying in other countries will more than double to 2.8 million between 1995 and 2010. While the proportion of these students coming to North American universities, and the subset seeking studies at intensive English programs, may be reduced by competition, overall numbers of students in U.S. institutions should increase.

Shift to graduate studies. The shift to graduate studies by international students may have serious implications for IEP enrollments over the longer run. Upon completing their degrees, graduate students can return home and participate in the development of their countries' universities. Desruisseaux (1995) points out that many of the Turkish students sent abroad in the 1990s came as graduate students "so that they can help staff the new [Turkish universities] (p. A38)" when they complete their studies; *Open Doors* data reveal that in 1997-98 57.4% of the Turkish students in the United States were studying at the graduate level. In 1995, Chinese universities were expected to increase enrollments by nearly 200,000 students ("International update," 1995), indicating a growth in university capacity that must somehow be related to the fact that 83.5% of the Chinese students in the United States were studying at the graduate level in 1997 (Davis, 1998).

An increased supply of faculty for home-country institutions can decrease the need for students to seek undergraduate studies in the United States. Davis (1995) points out that increased university capacity at the graduate level at home could mean fewer international graduate students needing advanced study in the United States as well. Both IEP enrollments and TOEFL testing programs would be affected by such trends.

Because a uniform database does not yet exist to track individual enrollments in IEPs, data on whether undergraduate or graduate students tend to stay longer in IEP, studies are not available. However, students planning graduate study are able to include studies of English in their undergraduate programs in anticipation of graduate studies in the United States, and therefore begin IEP studies at a higher level. Also, graduate students tend to enter IEP studies with a more focused sense of purpose than undergraduate-level students, and so approach language preparation with greater dedication. A larger proportion of graduate students undertaking IEP studies may translate, then, into shorter stays (i.e., fewer sessions and lower rates of re-enrollments) in English programs.

Safety in the United States. The concern over personal safety had a negative impact on Japanese student enrollment in IEPs during the early 1990s. While other incidents involving international students since that time have not received the media attention that the Hattori killing generated, future crimes against international students could also adversely affect IEP enrollments. One portion of the IEP population that is particularly sensitive to this issue of safety are language-only students (including those on excursion programs and short-term special programs). While these students have a less direct relationship with the TOEFL test than degree-oriented students, a reduction of their numbers could interfere with the operation of some IEPs. Also, some of these students decide to seek admission to an academic degree program after they get to the United States and enroll in IEPs, and some take the TOEFL test for personal or programmatic reasons.

Technology. Continuous improvements in computer and communication technologies, impressive innovations in the educational applications of computers, and the spectacular growth of the World Wide Web begun in the 1990s loom as developments that will surely affect IEP enrollments. With the notion of online courses, if not the "virtual campus," spreading in most academic disciplines, the potential of distance learning in the study of English, at least as a marketing concept, began to emerge in the late 1990s. Dave Sperling's ESL Café website (http://www.eslcafe.com/search/Online_English_Courses) listed almost 40 links to online ESL/EFL instruction sites. The Englishtown site (<http://www.englishtown.com>) is an example of a full set of English courses offered over the Web by a private language company. The possibilities of language instruction by way of MUDs/MOOs, such as

schMOOze (<http://schmooze.hunter.cuny.edu:8888>), and desktop videoconferencing, such as CU/SeeMe formats, offer learners alternatives for access to instruction and offer IEPs alternatives for the delivery of instruction.

Wild Card Factors

A flu virus no one has ever been exposed to, one that can move swiftly, causing illness and death, social chaos and political disaster around the globe, could be incubating right now in a remote part of China (Manring, 1996, p. 3E).

The possibility of pandemic influenza, outbreaks of the Ebola virus, and the spread of dengue hemorrhagic fever into the United States (Henig, 1995), all represent threats to the flow of international students. If they occurred in the United States, international students might be reluctant to come for university and IEP studies. On the other hand, if they occurred in other parts of the world, they could affect the pool of potential IEP students and perhaps result in quarantines that extend beyond any affected region. While such scenarios are perhaps a bit far-fetched, these viruses can serve as a metaphor for the less-than-apparent variables that can influence, if not dictate, IEP enrollments. The tragedies of Hurricane Mitch in Central America in 1998 and of the 1999 earthquakes in Turkey and Taiwan give evidence as well to the role that natural disasters can play in the countries of origin of IEP students.

IEPs in 2010

The implications sections that end each discussion of IEP influences are predictions of a sort, but larger-scale trend forecasting is a riskier undertaking. Anyone who had accurately predicted the developments outlined earlier might want to consider reorienting their talents towards speculation in stock markets or lottery tickets. As suggested at the beginning of this section on influences on IEP enrollments, few of the more influential circumstances that have affected, and might yet affect, intensive English programs could be considered easily identifiable based on the extension of some trend line.

It is obvious, even after the Asian Crisis that began in 1997, that Asian students control the IEP enrollment trend line in the early 2000s. Though their presence dropped from comprising nearly two-thirds of all IEP students in 1997 to accounting for just over half in 1998, Asian students should continue to influence the viability of IEPs in the United States. Since Japan provided a relatively constant 20%-plus of IEP students in the 1990s, even during the economic crisis, events and circumstances there have particular relevance for IEP enrollments.

The economic lesson of diversification was one outcome of the Asian Crisis. Over-dependence on enrollments of students from a relatively small number of countries had serious consequences for many IEPs. With favorable economics, oil prices, and world political situations, China and Latin America (particularly Brazil, Mexico, and Venezuela) will probably define the future enrollment trends over the next 15 to 20 years — with healthy contributions from Korea, Taiwan, and Thailand when their economies recover. With a substantial increase in the numbers of Chinese and Latin American students entering IEPs, the enrollment trends will remain steady, or even shoot upward. Without these students, however, a major downward trend in the graph of IEP enrollments could occur, and a dwindling number of Japanese students would drive the descending slope. In any case, the first few years of the 2000s may well bring relatively flat growth, and perhaps some noticeable decline, in total IEP enrollments, until the

Chinese and Latin American economies reach levels at which personal and family support of IEP costs is feasible. A war in Korea or in the oil fields of the Middle East will “complicate” that, and indeed any, scenario.

Overseas language programs may expand in China, Latin America, and elsewhere as an attractive alternative to the expense of coming to the United States for English studies. The venture capital that financed the previous peaks in IEP enrollments came primarily from oil, government sponsorship, or booming economies, none of which have firmly materialized in China or Latin America (outside of Venezuela). Overseas English programs circumvent the need for substantial funds to support the high cost of IEP sojourns. If China permits the establishment of branch campuses in that country, the English programs associated with those campuses could prove immensely popular and be accompanied by an increased use of the TOEFL Institutional Testing Program there.

At least one other factor needs to be included in any prediction of IEP enrollment trends — namely, developments in computer technology and communications, which will influence IEP enrollments, as well as language instruction, curricula, and assessment. Distance learning possibilities by way of the Internet and yet-to-be-created means of communication may mean that fewer students will have to leave home to obtain at least some of their language instruction. The ramifications for IEP delivery of services and for language testing needs and organization demand both anticipation of the developments and forward-thinking responses on the part of IEP administrators.

4. Intensive English Programs and TOEFL 2000

Part of the task of this paper was to address test washback, or “the effect of testing on instruction” (Bachman, 1990, p. 283), with specific reference to the TOEFL test, from the perspective of enrollment trends in intensive English programs. The issue of test washback has been well, though not concordantly, discussed in papers by noted specialists in language testing (Alderson & Wall, 1993; Wall & Alderson, 1993; Alderson & Wall, n.d.; Hughes, n.d.). It is beyond the scope of this paper to address the issue from a testing perspective.

Instead, the focus here is on test reverberation, how the impact of the TOEFL test echoes in the halls of IEPs, if not in the minds of IEP students. It is no striking disclosure to assert that the TOEFL test is a primary impetus for IEP enrollment by students intending to pursue a degree in the United States, nor is it breaking news that IEPs are pressured to respond curricularly to the perceived needs of their learners. Of the 530 intensive programs described in *English Language and Orientation Programs in the United States* (De Angelis & Steen, 1997), 362 reported use of the Institutional TOEFL; 280 programs expressly included mention of a TOEFL preparation course in their curricular offerings, with a number of other programs offering test preparation on an “unspecified” test. One contributor to an electronic list on TESOL matters remarked quite emphatically that “our field is a subsidiary of ETS. Whatever they decide to put on the TOEFL becomes the driving force behind the curriculum of many an IEP” (Kent, Personal Communication, May 20, 1996). Publishers, too, have noticed the market for TOEFL preparation materials. The 1999 catalog of Delta Systems, Inc., a reseller of ESL texts and materials, lists 18 distinct titles of TOEFL preparation materials (it does not include the four titles published by ETS), with 52 different ISB numbers. Each year a number of sessions at the TESOL convention deal with preparing students for the TOEFL test.

In short, in the IEP world the TOEFL test reverberates more so with students than concepts like academic English proficiency, content-based instruction, or communicative competence. The TOEFL test is, after all, a barrier exam: Attaining a college or university’s required TOEFL score, commonly known as “passing the TOEFL” by most IEP students (and perhaps by too many IEP instructors), must happen before a student may enter that college or university. This, after all, is the reason the degree-seeking student came to the United States in the first place.

It is not uncommon for IEPs to include a TOEFL prep class in their curriculum, as mentioned earlier, or to integrate such preparation into the overall program curriculum. It is not uncommon for IEP instructors to meet at least initial resistance to an activity, and even to course design, because students do not see the direct relevance to the TOEFL test. And it is not uncommon for students to seek out extracurricular TOEFL preparation assistance in the form of private classes, study groups, private “collections” of disclosed forms of the test, or published practice materials. One need only mention TOEFL among academically-bound IEP students or among IEP instructors to realize its significance.

The changes that the TOEFL 2000 project brings to proficiency testing will obviously resonate in student perceptions and attitudes, in IEP curricula (either directly or indirectly depending on a program’s orientation toward the TOEFL test), and of course, in published test preparation materials. The student movement trends and predictions outlined earlier will probably bear little pertinence to the reverberation, since academically-bound students from any country will continue to pay heed to the existence of the TOEFL test, due to its controlling influence on their futures. The reverberation will continue to have its effect, both on students’ approach to language learning, and on the approach of intensive English programs to meeting the wants and needs of their students.

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