

GLOBAL TRENDS IN THE HIGHER EDUCATION MARKET
RECOMMENDATIONS FOR UNIVERSITAT ROVIRA I VIRGILI
FOR SPECIFIED ACTIONS
FOR THE STRATEGIC INTERNATIONALIZATION PLAN

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SUPPORTING ANALYSIS

How do International students decide where to study and what influences their decision making?

When deciding upon which courses to market and which countries to target in marketing and recruitment, it is important also to know what motivates students and what affects their decisions.

A survey of some 40,000 students globally by i-graduate/Study Link in 2006 (Blight 2006) confirmed the following factors in prospective student decision making; later smaller samples of student decision making indicate the only changes since have been the increasing reliance upon rankings of universities and increasing use of web (90% ++ of students use the web to seek information re possible study destinations).

1. Influences on student decision making
 - Parents
 - University website (important for URV to improve)
 - University guide
 - Host government information (Spanish Government and Universidad.es role)
 - Online directories [directories of websites re a particular type of business or subject].
 - Alumni/former students (use them as a recruitment tool)
 - Search engines (importance again of website)
 - Current teacher (importance of personal and institutional relationships)
 - Employer/scholarship authority/sponsor (importance of links with scholarships authorities)
 - Exhibition/fair (relatively low influence, useful for profiling and as part of a marketing and recruitment package)
 - Home government
 - Visit by university
 - Friends
 - Newspapers/magazines
 - Printed guide

- Rankings tables (a recent smaller survey put rankings as most important)
- Agent (but the importance varies between countries)

2. How do students choose a study destination?

- Students choose course before country
- Institutional reputation is more important than country reputation
- Department reputation is not important
- Career prospects is a more important factor than cost of tuition
- Internship possibilities is not important
- City and location is least important (in practice this appears often not to be the case!)
- Europe generally is less attractive as a student destination than the US, UK, Australia, Canada and New Zealand; a 2006 survey by i-graduate registered Spain as a prospective student destination by 4% of respondents. The Netherlands scored 3%, Sweden and Switzerland 2% each. This confirms that there is a solid potential recruitment base for Spain; it is not known where the respondents lived but a fair presumption is Latin and Central America.

3. What are important factors in living conditions?

- Safety
- Internet access
- Costs of living
- Future contacts
- Transport links
- Visa advice
- A good place to be
- Host culture
- Accommodation quality
- Financial support
- Other friends
- Host friends
- Earning money
- Social facilities
- Sports facilities
- Social activities
- Similar friends
- Worship facilities

4. What are important factors in teaching and learning?

- Good teachers
- Course content
- Library facilities
- Expert teachers
- Assessment
- Technology
- Learning support

- Employability
- Work experience
- Academics' English language capacity
- Flexibility
- Careers advice
- Learning spaces
- Research
- Language support
- Multiculturalism

5. How do students find information on the web re possible study destinations?

- Yahoo
- Google
- Wikipedia (know what it says about you)
- MSN search
- Online discussions (importance of new social media)
- Ask
- Alta Vista
- Lycos

What are the lessons for URV as a result of the research on students' decision making?

- The necessity of a good website with a dedicated "International" portal in English which provides all prospective and current international students with the necessary information, including a "Frequently Asked Questions" section.
- The need to raise the international visibility and profile of URV on the web via use of the new social media. Prospective students increasingly use the internet to seek information re possible study destinations, including the opinions of current or past students. Thus URV needs to participate in such social media sites as Facebook, LinkedIn, YouTube (including a dedicated URV Channel on YouTube), iTunesU (University) and to use them as indirect marketing and recruitment tools – and also to ascertain what people are saying about URV. This requires professional expertise and central control by the University.
- Students will choose programs before country; that is, URV can market high quality programs even if the reputation of Spain/Catalonia as a study destination is not prominent.
- Control what Wikipedia is saying about URV.
- URV needs to be easily found by internet search engines and the URV website when found, must be accessible and easy to use.
- Education fairs/exhibitions are not very useful in isolation; they should be used as part of a strategy within a locale or country. For example, attendance at an education fair as part of a package of marketing and recruitment activities – alumni receptions, graduate seminars given by quality URV academics in subjects of local interest and also attended by URV marketers who can follow up on

individual interest in studying at URV, liaison with Spanish embassies/consulates and liaison with any local URV university partners.

- Parents and teachers can be strong sources of advice/influence on where students choose to study, so it is important for URV to maintain good contacts with teachers in partner universities (especially in target countries) and to have activities in which parents can be involved and learn more about URV.
- Reasonable quality, reasonably priced safe student accommodation which has student internet access and which is accessible to the University is essential.
- Rankings and the reputation of the university are increasingly influential in student decision making.
- Alumni form an important recruitment tool and graduate success stories tell a good story about the University as graduate employability is a significant factor for students ("will this program and this university help me to get a job?"). Data on graduate employment rates needs to be kept and to be used for marketing.
- Good teaching, not surprisingly, is highly regarded. How can URV rate its teaching quality? Is there external evidence that you are good? Is there evidence of student satisfaction with the teaching at URV?
- Education agents rate low as an influence on student decision making; however, they are still useful in marketing and recruitment especially in countries where agents are dominant (India, South Korea).
- A rapid response time to enquiries and applications is a key. Responses cannot take months. Competitor countries will respond to an enquiry within 24 hours and to a mainstream application (not a research degree application) within 3-5 working days. Contact needs to be maintained with the prospective student throughout the enquiry/application period.
- Marketing and recruitment is not cheap and it must be targeted to particular programs and countries – do not try to market all things to all people. URV needs to establish a quality niche in the market and then work it hard.

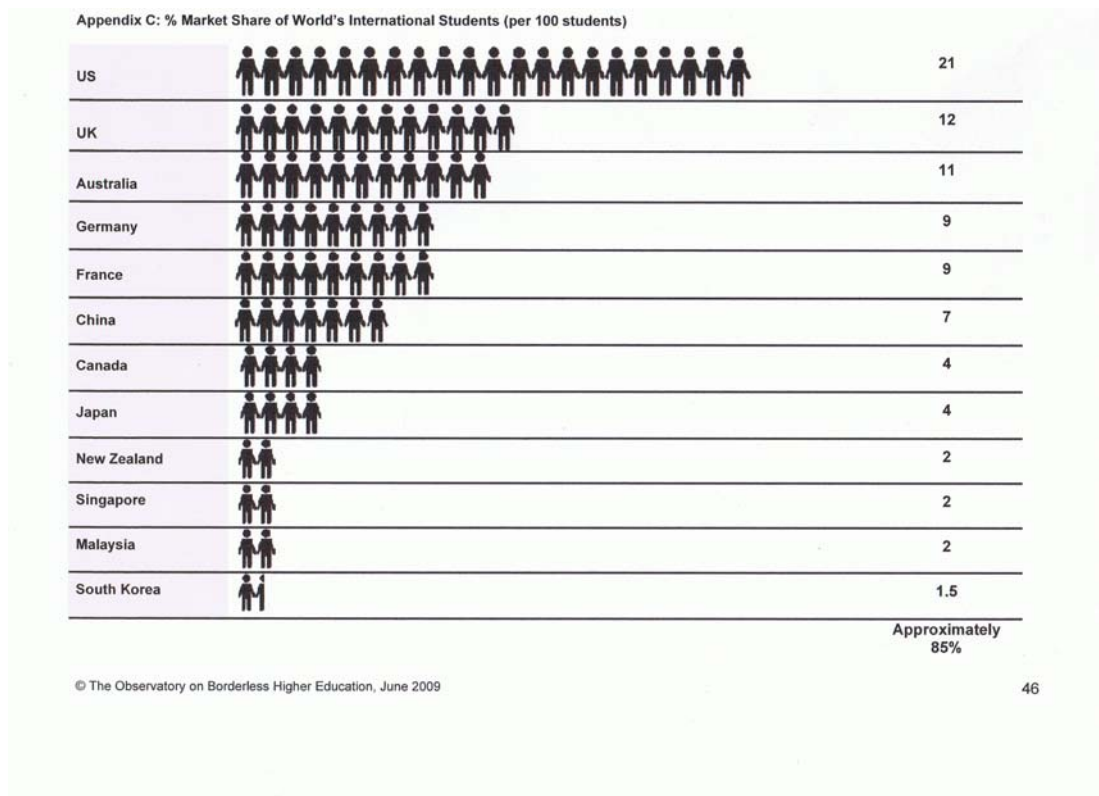
Global student mobility

1. Globally, 2.8 million students are being educated outside their home countries though it is very hard to disaggregate how many are paying fees and how many are exchange and how many short term or long term. The total number is a 50% increase since 2000 and 61% since 1999.
2. The number is forecast to rise to 5.8 million by 2020 and to 7.2 million in 2025. Asia will provide 3.8 million or 65% of the total in 2020.
3. It is forecast that China and India will continue to dominate in respect of students travelling abroad for study; although China is adding 2,500,000 extra higher education places annually for students and has

increased its numbers more than three fold in recent years, it still cannot meet domestic demand despite a compound annual growth rate of 25%! In contrast India has a compounded annual growth rate of only 1% increase in local higher education capacity.

4. The figures are staggering: China educates 25% of the globe's students, has 22,000,000 students in higher education and a participation rate in higher education now of 22%. India's higher education participation rate is 12%.
5. Note also that China will soon be facing a drop in the number of 15-18 year olds as the one child policy hits home, the number of 15-19 years old will drop from 117,000,000 in 2005 to 85 million in 2020. In contrast, the same cohort in India will rise from 114,000,000 in 2005 to 127,000,000 in 2020. By 2030 it is estimated that India will have 70% more in the 15-24 age group than China!
6. Note though that current forecasts are that only 300,000 of those Indian students will travel overseas for their higher education (assuming no dramatic change in the factors currently used to forecast growth).
7. Other countries forecast to have large numbers in the 15-24 age group in 2030 are the US (perhaps surprisingly), Nigeria, Pakistan, Indonesia, Brazil, followed by Ethiopia, the Philippines, Mexico, Egypt and Vietnam. Predictably these countries usually appear high on the list of major source countries except where extreme poverty (for example, Ethiopia) is a factor.
8. Germany, France and China attract 25% of the global student market. But generally they are regional rather than global recruiters, that is, they mainly attract students from countries with traditional socio-historical linkages. This may change as each of these destination countries offers more English language programs and becomes more strategic in its international student recruitment. Germany attracts many Turkish students – it is often not clear whether these are genuine international students or Turkish students living in Germany without German citizenship. It should be noted that 32% of the international students in France come from Francophone countries and that seven of the top ten sending countries for France are Francophone (Algeria, Morocco, Senegal and Tunisia and to a lesser extent Lebanon and Syria). Overseas students in China are overwhelmingly students learning Mandarin and are from Japan and South Korea.
9. France and Germany will be competitors with Spain as they either charge no fees (France) or low fees (11 of 16 German states now charge low fees, no higher than 1500 Euro per year).
10. The US, UK and Australia have 44% of the market between them.
11. Canada, New Zealand and Japan attract 10% of the market.
12. Singapore, Malaysia and South Korea attract 5% of the market and all are determined to become international education exporters.

13. The host countries for higher education international students are the USA (670,000 or 630,000 depending upon the data source), UK (390,000), Germany (260,000), France (260,000) and Australia (220,000). Canada has 120,000, China has 220,000. Per capita of population the global situation is dominated by Australia.
14. The UK attracts 12% and both France and Germany have 10-11% according to some sources and 9% according to other sources – the latter seem the most up to date and accurate, giving Germany 9% and France 9% also. The UK numbers keep increasing but the global percentage enjoyed by the UK actually has shrunk in recent years, a striking example of the growing number of globally mobile students as much as a decline in performance or stronger competition per se from other countries.
15. Again it must be stressed that it is difficult to get good comparative data where like is measured against like in respect of definitions of what is an “international” student and who is paying fees and who is not.
16. Five countries host 70% of the internationally mobile students and the USA, UK, Germany, France, Australia and the OECD countries have over 90% of the internationally mobile students between them.



Major source countries for international students

1. The sending countries are dominated by China (400,000), followed by India (140,000) and South Korea (96,000). A host of countries are clustered around 50,000 students, namely, Japan, Germany, France, Turkey, Morocco and Malaysia. Greece, Taiwan, Russia, Hong Kong and Indonesia are also substantial international student sources.
2. Japan has seen the biggest decline in the number of students going overseas for study.
3. It is significant that certain countries sometime not often on recruiters' radar actually are important source countries for students studying higher education overseas; for example, Iran, Morocco and Turkey, Brazil, Saudi Arabia, Russia, Vietnam and Nigeria are the fastest growing (in percentage terms) in terms of sending students overseas and this shift may effect over time where students choose to study – though it is hard to see the US and the UK losing their market dominance as destinations.
4. Fascinatingly, there are proportionately (per capita of populations) more students from Arabic countries studying overseas than there are from China.
5. Spain can legitimately expect to attract more international students from North Africa if it so desires and if it recruits professionally; that is, from Morocco, Tunisia and perhaps Algeria. For example, Morocco in the north of the country has the funds for overseas education, there is both Spanish and English language capacity and there is a lack of local PhD capacity making it an ideal potential market for Spain. The competition will come from the current market dominance of the US in Morocco.
6. Turning to the percentage of international students within various national higher education systems, for the UK it is 17.9%; Germany 11.4%; France 11.2%; Belgium 12.1%; Switzerland 19.2%; Austria 15.5%; Netherlands 6.1%; Sweden 9.8%; Spain 2.9% and Italy 2.4%. In Australia it is 20% and in New Zealand 28.5% (!) Canada has 14.6 % and the US only 3.3%.
7. The figures change dramatically when looking only at doctorate and research international students. The UK has 42.7% and Switzerland 44.2%. Germany data is unavailable, France 35.8%; Spain 19.2%; Belgium 31%; Sweden 20.6%; Italy 5%; Austria 20.9% and the Netherlands has no data available. The US has 23.7% whilst Canada is 38.3%, Australia 29.7%, Japan 16.8% and New Zealand 42.8%. It can be seen that the US remains strong in graduate education, especially in Business, Engineering and the Sciences. This has been a major driver in the US's technological and economic strength with many international students (most notably from China, South Korea and Taiwan) staying on after graduation and contributing advanced skills to the economy. Students from India, China, South Korea and Taiwan gained 20% of all doctorates in the US in 2007 [Douglass & Edelstein, p10].

8. It can be seen in both types of data that Spain does not do well compared to other countries in respect of attracting international students.
9. Russia is a growing market. However, it is a Business -dominated market at the moment (MBA, Finance and undergraduate Business).
10. South and Central America are growing markets held strongly by the US and by France and Spain and to a lesser degree Australia. Obviously this is a potential market for URV.
11. Indonesia was a major source of international fee paying students until the 1997 Asian financial crisis; numbers have never really recovered from that time and it is a market dominated by the US and Australia and, within Europe, by the Netherlands.
12. Taiwan and South Korea are major sources but are US dominated and would generally only consider the elite of European universities for fee paying study (even the UK has only 4% of the South Korean market!). The main interest is in Science, Engineering, Technology and Computing at advanced levels.
13. Turkey is a strong growth country, again it has strong links with Germany and the US and competitors like Australia have had difficulty making a significant impact despite many efforts. It has a growing economy, a young population projected out over the next 20 years and a lack of local higher education capacity.
14. Australia has been very successful in Vietnam though now the US is making a mark and will be a strong competitor to Australia. A number of European countries have been active in Vietnam (Germany, France, Belgium and Sweden) and these countries, or at least specific institutions within them, have a profile in Vietnam which provides a base for fee paying student recruitment. Spain will find it difficult to compete in Vietnam in the short term.
15. The Middle East countries pre 9/11 were dominated by the US and the UK; since then Australia has been successful in fee paying student recruitment in the region and there is scope for European universities to do the same. There is evidence of demand for Dentistry, Orthodontics, Odontology, Nursing, Education and general undergraduate programs in Business and Science and Computer Science. Spain will find it difficult to compete in the short term unless a university has special connections into the region.
16. Eastern Europe has often been proposed as a large new market for international students though the reality is more complicated. The quality of higher education provision is fine; for example, Swedish students who cannot gain access to the tight quota for medical training within Sweden have been studying medicine in Romania, Poland and Hungary and then returning to Sweden to practise medicine. There have been no

reservations re the quality of the education provided in the Eastern European countries.

Poland seems at first sight a promising market for student recruitment; globally high rates of secondary schooling completion, globally high rates of higher education participation, strong economic growth rates, a strong academic and intellectual tradition and a country on the verge of entering the World Bank High Income band are powerful indicators. But there is the problem of a steeply declining population rate especially in forecasts for the 15-24 age cohort. There simply will be less demand for higher education within Poland over the next 10-20 years in contrast to recent decades. Indeed, this is already showing and Polish higher education has empty places and since 2005 has been running a "Study in Poland" campaign to attract foreign students! Polish students who do go overseas predominantly go to Germany and study philology, law, mathematics and the natural sciences and mathematics. A second major problem is the very low expenditure per person on education, less than half the OECD average and below Hungary and the Czech Republic; at the same time, gross participation rates are at the OECD average. A third problem is that the recent surge in enrolments led to the rise of a private sector with quality problems and to the fact that many domestic students in both public and private institutions, the latter focused as everywhere on business and social sciences studies, have been paying fees and many university teachers teach in multiple institutions and have no loyalty to any one place and have little or no time or incentive to do research. It seems that Poland will not be a big market for foreign recruitment given the demographic changes and the excess of places available within the domestic higher education sector. *However in the short term there is a market for both Bachelor and Masters students from Poland wishing to study elsewhere in Europe and the Netherlands for example has been successful in attracting fee paying students from Poland at both levels notably in the Social Sciences and Humanities. Sweden is now entering the market in Poland. Language clearly is a problem unless URV can offer programs in English attractive to Polish students. The strategy, given URV's focus on attracting high quality Masters students who may continue to do a PhD at URV will be to form close connections with quality Polish universities [as it has done in Rumania] and also to market Masters programs in priority areas into Poland through fairs and the use of education agents – if URV decides to follow that path.*

Russia is facing a similar demographic change, only more intense. A declining and ageing population, a shortening of life expectancy amongst males and a serious wealth inequality pose problems for Russia internally and for other countries wishing to recruit Russian students. Moreover, Russia is eager to become an education exporter itself and already has a significant share of the global student mobility market, focusing especially on China. The Australian experience also has been that there is a very high visa rejection rate for prospective Russian students applying to study overseas; training of local agents has improved rates, nevertheless Russia has never proved to be the expected large source of fee paying students. However, there are

encouraging figures: a high secondary education rate globally, traditional strengths in mathematics and the basic sciences, a small number of elite institutions and a growing upper middle class which has the funds to send their children overseas to study, currently to Germany, the US, France, Sweden and the UK. Graduate student recruitment and research cooperation is possible despite the fact that the Russian higher education market is skewed heavily towards study of Business and related subjects. Like Poland, Russia does not seem to be a priority for Spain. *Russian students domestically are accustomed to paying fees and these can be very high according to the prestige and location of the institution and there is also a lack of local higher education capacity with many qualified students missing entry into higher education every year in Russia. So there may be a market but it is mainly in academic areas not currently priorities for URV and/or not currently taught in English such as Business, Social Sciences and Humanities. Tourism and Tourism Management is one possibility for URV in Russia.*

Bulgaria is not a major market for international student recruitment given its dramatically declining student age cohort (well below the global average) and sufficient domestic capacity to absorb local higher education demand; note that the higher education participation rate is relatively low due to the inability to afford higher education in Bulgaria where all pay fees and not all can get scholarships. On the other hand Bulgaria has a rapidly growing economy and reasonably high education expenditure and an income in the World Bank Upper Middle Income band. Germany traditionally has been the most popular destination for students especially in the sciences and mathematics. English language capacity is good. But the lack of funds means that scholarships and financial support will be required – and/or low fees in the recruiting country (Spain has an advantage here)- plus work rights (and actual employment) must be available. It may be worth looking at for postgraduate studies in the sciences and related areas if there are close connections with local universities, but there is *little* case for it being a priority for student recruitment by URV. *Bulgaria has however proven attractive for Dutch marketers selling fee paying programs to Bulgarian students at both undergraduate and postgraduate level in a range of areas such as Tourism, Information Technology, Social Sciences and Education. Tourism and Information technology and Engineering are areas of strength of URV and of interest to Bulgarian students.*

Romania has close connections with URV through two local university partnerships and thus it seems worthwhile to look at Romania as a student recruitment market in terms of upgrading the qualifications of university staff in Romania (PhD and post-doctorate). Without this connection Romania would not be an attractive market; concerns re quality, scandals and corruption in the private higher education sector, a chronic lack of investment in higher education, a lack of local capacity and a constant talent drain to other EU countries has placed Romanian higher education in a fragile state. The existing partnerships leading to study at URV in Basic Sciences and Engineering would be a

small niche market. *Recently Romania has proved quite attractive to Dutch universities wishing to recruit students and Swedish universities are now following them as they seek to recruit European students to fill places left empty by former students from outside Europe who from 2011 will have to pay fees to study at Bachelor or Masters level in Sweden. Attractive areas for students are Social Sciences, Economics, Education and Science and Technology [this being most relevant to URV].*

What can URV learn from the recent experience of Denmark and the Netherlands?

- Concentrate on the postgraduate level; Masters by Coursework and PhD.
- Focus on particular countries for student recruitment and have student recruitment as one part of a strategy of engagement with the target countries; that is, there should also be research cooperation, developmental cooperation, staff and student exchange and perhaps joint programs. "Partnerships" of mutual benefit is the most sustainable way forward for institutions.
- Have an institutional scholarships strategy. This is less crucial for URV in the absence of international student fees; however, having fellowships/scholarships/fees remissions and post-doctorate positions is always attractive to potential students and is a means of gaining and keeping better quality students. It forms a necessary part of an internationalisation strategy and is part of an institution's brand and market position and international profiling.
- Focus on a small number of programs which are linked to recognised research strengths of the University.
- Develop more programs in English (and in Spanish).
- Government support is crucial at the policy level and at the national marketing and branding level.

What programs are in demand globally by international students?

The analysis focuses upon Masters by Coursework programs with some reference to undergraduate programs.

1. 48% of the 2009 surveyed prospective international students are looking for a Coursework Master program, according to the 2008 Student Pulse /i-graduate global data. Note that the recent rise in "postgraduate" enrolments globally by fee paying international students is misleading since so many are looking for taught Master programs which traditionally did not exist and did not count as "postgraduate". Coursework Master Programs are where the growth is biggest.
2. Of the 11,000 prospective fee paying international students surveyed by Student Pulse, 20% seek Business and related programs, 11% Humanities

and Social Sciences and 11% Information Technology and Computer Science.

3. UK higher education data confirms these findings. In a total of 370,000 international students, 50,000 are doctoral level and 132,000 Master (essentially Coursework programs). In the Master programs, 30%+ study Business and Management; 12% Engineering and Technology; Social Studies 8%; Languages 3.5%; Computer Science 7%; Medical and Health Sciences 6%; Law 7% and Creative Arts and Design 3%.
4. Business and Management programs clearly are the most favoured at all levels of study though at the undergraduate level, the Business programs proportion drops to 22% and Medical and Health Sciences rises to 8%, Languages to 9% and Computer Science falls to 4%.
5. The proliferation of joint and double degrees (JDD) in Central and Latin America since 2000 is another indication of what students want to study. Masters programs in Business/Management and Engineering are the most common. European universities tend to establish such programs with other European or US partners and double degrees unsurprisingly are the easiest to establish and hence the most popular. English language programs dominate and many programs rely upon external funding at least at the outset. The Erasmus Mundus and Atlantis programs are good examples. Latin America is targeted (along with other regions) in Erasmus Mundus and in the EU Seventh Framework Program so there are now opportunities for European universities to cooperate with Latin American universities but to date there has been little concrete result. But it does show the trend in what students want to study and does indicate a potential way forward for URV (and Spain generally).
6. The large British Council "Vision 2020" project and Report in 2005 attempted to forecast international student studies demand out to 2020. The forecast for 2015, there being little difference between 2010 and 2015 forecasts, concluded: Business and related programs (Management, Accounting etc) 24%; Arts and Humanities 14%; Computer Science 12%; Engineering and Technology 12%; Physical and Mathematical Sciences 8%; Social Sciences 8%; Medical and Health Sciences 6%; Law 4%; Education 4% and Architecture and Building 2%.
7. The figures vary between countries reflecting how international students perceive the strengths of different countries in research and teaching. For example, "Business" is categorised as "Management and Commerce" and is 36%, Engineering and Sciences of all types drops to 11% and Information and Technology rises to 20%. The US has many more international students in Science and Engineering in all categories reflecting that country's reputation as having the most advanced research in those areas, as opposed to Australia's reputation as having good courses but below the UK and the US in terms of quality. Hence Australia's dependence on more generalist programs in IT and Business (including Tourism and Hospitality as very popular programs).

8. A problem is that the broad categories do not tell us the detail re actual subjects. However personal experience and local data analysis confirms that Science and Technology can be disaggregated into strong interest in Nanotechnology, Materials Science, Computer Science and Environmental Science and Ecology/Sustainability (including Water Management).
9. The most recent development has been growth in the areas of Biotechnology, Biomedicine and Bioentrepreneurship. This has attracted students from Asia (Singapore, China, Malaysia, South Korea and Taiwan) and within Europe itself. There is evidence that this is beginning to be a growth area in India especially in the private sector.
10. The most popular programs within the Arts/Humanities and Social Sciences are in Law, often difficult for overseas students due to the local nature of the legal system; and in International Relations, Development Studies, Global Studies and a variety of programs around the broad topic of International Law, Human Rights, Peace and Conflict Studies. Migration and Ethnic Studies (under a range of program titles) can be linked to this. These programs do not have the numbers of Business or Computer Science or Science and Technology and Engineering, but there is a solid demand from international fee paying students.
11. Looking at specific markets, India is a market focused on career prospects ("will this program get me a job?") and often on short term migration for work purposes after graduation. Popular Masters programs are Financial Analysis, Accounting, International Business and Business/Information Technology (combined). When the computer industry was booming, Computer Science was very popular, but not "hard" mathematical computing but rather the softer side where students can gain IT skills for vocational purposes without being actual computing experts. The stress now is on software (for example, gaming, media technology, software development) rather than hardware and Masters programs are frequently designed for graduates who have no Computing/Science background.
12. Increasingly, study is expected to have an employment outcome, that is, it is an investment in a career.
13. Thus, the ability to receive professional society accreditation in, for example, Accounting, is important to the students. The ability to work overseas with an internationally accepted professional society accreditation (if desired) is important.
14. Students are very aware of external professional accreditations as a mark of quality and will look for this in all professional schools trying to attract them as students.
15. There are different priorities in different countries, for example, Biotechnology is popular in China and in Singapore whereas Public Health is much needed in China but not in Singapore. But the patterns of demand are much the same across the globe. Business and IT are most

in demand; Public Health is in demand as is Nursing and the allied Health professions like Nursing, Physiotherapy and Nutrition; Science, Technology and Engineering have solid demand especially for universities in the US and the UK and prestigious universities in Europe and in the “newer” areas of Science and Engineering rather than the traditional heavy Engineering; Education is in demand if it is not too parochial/local/national in orientation and especially in Applied Linguistics and Leadership and Management in Education.

16. The biggest market differences are: is there a capacity to pay fees? Are there scholarships available either locally or through Spanish funding? Are the students likely to obtain a Spanish student visa if they are accepted and can pay the fee? If the answers to these questions are “no” then there is no point marketing there no matter how tempting it may seem for other reasons (personal contacts etc).
17. URV has strengths in Tourism, Chemistry and Chemical Engineering (and in other fields). Tourism is a popular program for international students either in its own right or often linked with Hospitality programs. It is very cyclical in the sense that the popularity is dependent upon economic circumstances and is often targeted more to undergraduate pre-employment programs. Tarragona/Spain has a natural advantage with Tourism within other European countries and elsewhere in the world. Chemical Engineering (under various titles) is in steady demand as can be seen by the number of such programs on offer at Masters level at high quality universities across the globe. Chemistry is more of a narrow demand, partly as a result of the global drop in demand for basic science studies at all levels of education and partly because there has been such a growth in more specialist areas. Many universities in fee paying countries have packaged “boutique” Science degrees designed to appeal and often in conjunction with another discipline; for example, double degrees in Science and Business/Management. Sustainability as a theme is increasingly popular as are programs dealing with Environmental issues; in both these fields there is a strong interdisciplinary approach.

International student market potential with respect to Latin America and the Caribbean focusing on particular countries in the region

URV specifically and Spain generally obviously already have cooperation with universities in a number of countries in this region. Equally obviously historical links and the use of a common language give URV and Spain an advantage in respect of student recruitment.

This section of the Report summarises the higher education and international student mobility situation in the major countries of the region to give guidance to URV on where to market. The analysis must be examined in the light of URV's existing partnerships in the region; that is, where is URV already present and prominent in the region?

Latin American participation rates in higher education are led by Chile, Argentina, Uruguay, Peru, Colombia and Mexico, albeit all lag behind the OECD average. Internationalisation also lags in Latin America for political and socio-historical reasons. Graduate education lags especially at the PhD level with participation rates well below OECD rates across Latin America, though graduate Masters Programs in the professions are rising. Indeed, another characteristic of the Latin American higher education system is a concentration on the professions – Law, Business, Humanities and Education – and a neglect of the Sciences, Engineering and Technology. Moreover, 86% of teachers in both the public and private higher education sector are part time, often holding more than one job, and relying on old fashioned teacher centred pedagogy. This leads to inefficiency and a lower research output. Many staff do not hold a PhD and have no real connection with their university. Student attrition rates are high. Argentina, Mexico, Uruguay and Venezuela have expanded through the public system whereas Brazil, Chile and Colombia have expanded more through the private sector.

Given that the public sector cannot meet demand, all governments (except Cuba) have deregulated private education (especially in Brazil, Chile and Colombia) and it now accounts for some 40% of higher education enrolments across the region; more recently, the US Apollo Group has actually bought private universities in Latin America and is expanding into what it sees as a lucrative market where local capacity cannot still meet demand (a global trend for private for-profit higher education companies). Overall, access to higher education across the continent remains very unequal with the wealthiest having by far the highest participation rates. Internationalisation of higher education in Latin America is low compared to the OECD and to many Asian countries. One area where there has been activity has been since 2000 in joint and double degrees (JDD), especially the latter which are easier to establish and to manage. The JDD are with Argentina (35%) and Mexico (31%) primarily with the double degrees being 90% international – France 28%, Spain 17%, US 8% and Germany 4% the main players. Some 80% of the JDD are in the private sector in Latin America; clearly they are seen as a strategy to attract fee paying local students either through prestige or through offering the possibility of international experiences. At the undergraduate level 47% are in Business/management and 34% in Engineering and mainly in the private sector. At the postgraduate level, most PhD agreements are in the public sector and at the Masters level 41% are in Business/Management and 25% in Social Sciences and the Humanities. Funding comes mainly from the international university partner or an international organisation. The JDD are mainly in the professional area. Language capacity means that 61% of the JDD are taught in Spanish (not English) and that most JDD are thus with Spanish speaking countries such as Spain, Chile, Mexico and Colombia. Staff and student mobility are cited as the prime motivations followed by foreign language learning and curriculum internationalisation (a less important factor). Yet Latin America has one of the world's lowest student mobility rates: 5.4% contrasted with 45.3% in Asia and 21.8% in Europe. And only 3% of the world's international students were in the region in 2007. English language capacity remains low. The US, Europe and Canada are the preferred university partners, though Australia has made significant inroads in the last 10 years. Internationalisation is rarely included in

a university's strategic planning; it is simply not important. At the national policy level it is equated with mobility of staff and students.

Brazil

Brazil is maturing from a primarily tourism-oriented short term market ("learn in English in the sun close to the beach") into a longer term education-focused market which is also moving from a concentration on Masters study abroad to first degree study overseas (including Study Abroad). Brazil has a thriving private education system (it is legal to make a profit from education, not always the case elsewhere) and many students are encouraged to participate in high school international education experiences, frequently then returning to those countries for further study at higher education level. It is noteworthy that 50% of Brazilian 15-29 year olds live with their parents, suggesting that student care and support could be an important factor when recruiting Brazilian students for study overseas. The Brazilian student traditionally is mobile and many countries, including from the EU, are competing for this market. Brazil now offers good opportunities to recruit high quality PhD students and to establish research collaboration. In terms of internationalisation, the largest cooperation is with Spanish higher education. Brazil is one of the world's fastest growing economies [the BRIC economies of Brazil, Russia, India and China) and this is attracting interest from countries keen to cooperate and to recruit students. Although the GDP is low compared to Western Europe and similar developed economies, it is still placed in the Upper Middle Income Band by the World Bank. Brazil out-ranks other Central and South American countries on indices relating to a knowledge economy and rates reasonably well in terms of education expenditure per capita within its region. Nevertheless, Brazil lags with only a 26% higher education participation rate and most progressive higher education developments such as joint and double degrees with international partners have occurred in the private sector which accounts for 45% of higher education enrolments. The participation rate compares badly with the OECD rate of 57% and the Latin American average of 32% presumably reflecting the unequal nature of Brazilian society. Note that Argentina has a rate of 64%, Venezuela 52% and Chile 47% and at the bottom Brazil and Mexico with only 25%. The Brazilian public university system has about 30% with PhDs and about the same number being full time staff (the proliferation of part time staff is a major weakness in the higher education system). It has the most advanced graduate programs in Latin America. Brazil's international research publications and citations have increased substantially in recent years and probably ranks the best in Latin America (petroleum engineering, computer science, biotechnology). Cooperation and recruitment at the graduate level seems to be the best way for a foreign university to work in Brazil. The private university and college sector has grown dramatically since 2002 and this is not necessarily a good thing as it actually demonstrates the fundamental inequality of the Brazilian higher education system in which the middle and upper class achieve sufficiently to enter the public system which is free, whereas the poor achieve lower academically, fail to enter the public system and then have to pay tuition in the private sector if they wish to continue onto higher education. As had been the case in other countries in earlier times, internationalisation in Brazilian universities has tended to be left to individual enthusiasts, usually researchers with international links, with poorly financed

and tiny international offices; there is limited inward student mobility and the local universities generally are ill equipped to handle incoming students. There is little institutional strategy, although this is changing.. A similar tale would be told throughout Latin America. Most research and technical cooperation is with the US, UK, Germany, France, Spain, Canada and Portugal.

Encouragingly, 80% of PhD students return home after completing their study overseas (contrast Argentina). MBA programs operated by foreign universities either by distance, semi-distance/mixed mode or through operations within Brazil have proliferated since 2000. They range from prestige programs like the University of Pittsburgh to ones of dubious quality. Most international cooperation has been with Spain and France in respect of joint programs; for example, joint engineering degrees with the French Grandes Ecoles whereby students can get scholarships and free language instruction. It should be noted that although there is quality graduate provision within Brazil, it is concentrated upon professional degrees and diplomas, mirroring the undergraduate focus on professional education designed to get the graduate a job.

Brazil certainly has student recruitment potential for URV in Engineering and Biotechnology.

Argentina

Argentina has the highest access rate for higher education in the region, however its policy of unrestricted access to higher education means that it also has high attrition rates and low completion rates, common across the region as is a dependence on part time professors and a focus on professional education/training. Basic Science, Human Sciences and Health Sciences are the least popular programs. Young researchers doing postgraduate studies overseas show a lack of desire to return home to Argentina and this remains a serious problem despite recent incentives introduced by the Government to encourage students to return home after study. Transnational education is not encouraged; indeed, the WTO agenda to deregulate education and to see it as a "global social good" is unpopular in Argentina. The University of Bologna has a branch campus offering Masters programs such as in International Relations, however regulation of such types of programs is tight and the approach not encouraged. Broad MOUs re university international cooperation have been signed with Italy and with Spain (a number of Argentinean universities teach in the Spanish language) and there is a Latin America wide agreement re higher education cooperation, recognition of qualifications etc. Concrete activity has been slow to follow. There has been a growth in intra-regional student mobility but little with Europe and often only one way with little inward mobility from Europe to Argentina. There is no scheme like ECTS and often Argentinean students who go overseas receive no credit for their studies. For staff mobility, Spain is the most important partner. Argentina is coming out of years of turmoil and is trying to reform its higher education sector and to encourage its scholars to return home after many fled the country during the years of political unrest and then the financial crisis of 2001-2. The universities are free at undergraduate level and have no entry requirements beyond completing secondary school and the consequent attrition rate is very high. Private (fee paying) universities account for 20% of enrolments and are especially attractive at the Masters level which has seen the most growth in recent

years. The private universities have a much stronger reputation than the public sector. Few Argentinean students study abroad with the US being by far the most popular followed by France, Spain, Germany and the UK. Only 0.4% of higher education enrolments are by foreign students, so internationalisation in Argentinean higher education is extremely low, not assisted by the outflow of researchers in recent decades. Still, it is claimed that R@ices (the scheme devised to provide incentives to encourage researchers to return home, has been successful with 300 returning since 2005. Foreign universities are allowed to establish operations in Argentina and five have done so: Bologna (Italy), Salamanca (Spain) and Pepperdine, Chicago and Pennsylvania from the US. The US programs operate essentially as Study Abroad, Salamanca offers one Masters program and Bologna is more like a branch campus with a wider range of programs charging fees comparable to international fee paying programs elsewhere in the world. Joint or double degrees have proliferated in Argentina in cooperation with foreign universities, mainly with other South and Central countries and with Spain plus some with the UK and elsewhere in Europe. This seems to be an area of opportunity for cooperation for foreign universities especially from the Spanish speaking world focusing at the Masters level and on Business and Education. Also the Autonomous University of Barcelona, Salamanca University and others offer distance learning programs into Argentina. The low English language capacity in Argentinean universities remains a barrier to international cooperation; hence much of the cooperation has been and still is with Spanish or Italian universities where there have been historical ties.

Argentina may have potential for URV student recruitment in professional degrees but not immediately. The best approach would seem to be double degrees with partner Argentinean universities in professional areas at the Masters level.

Chile

Chile is attempting to modernise its higher education system and to develop its human capital resources via higher education at home and abroad via the Human Capital Development Program. For historical reasons, Chile has an expensive and inequitable higher education system in both the private and public sector. It has previously sent students to Spain because of the language link, however, now it is also following a policy of establishing partnerships with English language countries and putting significant funds towards providing scholarships for Chilean students to study in those countries; specifically the US, UK, Canada, Australia and New Zealand. In fact, historical links with Germany has meant that more Chilean students go to Germany to study than to Spain. Note also that the University of Heidelberg in 2002 opened Heidelberg Latin American Centre in Santiago for postgraduate training either via Heidelberg alone or in cooperation with the University of Chile and/or the Pontificia Catholic University of Chile. A Masters in Law and a Masters in Energy Economics is offered along with cultural and language courses. There is a strong German/Heidelberg alumnus in Santiago. The low English language capacity of staff and students remains a serious issue. It is planned to fund 6,500 postgraduate scholarships by 2012 (currently only 200). This is a large shift for Chile and of importance for Spain also which has depended on attracting Spanish speaking students from abroad. Chile is

investing in postgraduate (Masters and PhD) studies abroad via scholarship programs with the countries mentioned above: 100 with the UK, 100 with Canada and 500 with Australia and 200 with New Zealand (two priorities for Chile). In addition, there are agreements for international research cooperation. The scholarships will be granted in fields considered to be of strategic and sustainable importance for Chile as it tries to diversify from being a raw materials exporter (copper etc) to a modern knowledge based economy. This strategy is common throughout the world, of course. Priority areas for study and research are biotechnology, environmental management and sustainability, aquaculture, information technology, agriculture, forestry and mining. Public Health is another area in demand. Chile has been since the 1990s economically stable and prosperous relative to the rest of Latin America and so internationalisation within higher education has been more systematic and strategic as a component of opening Chile to the world after a period of isolation. Hence the slogan "Chile: a country for cooperation". The investment in English language capacity is part of making Chile internationally competitive. Clearly there are opportunities here for English speaking countries, or perhaps good university systems with a high English language capacity, to benefit from the Chilean scholarship scheme at postgraduate level. However the level of internationalisation within universities in Chile remains low and fragmented and rarely central to the university or central to their strategic planning and core activities. International offices are usually separate, small and poorly resourced. Heads of such offices are viewed as political appointments and thus change when the university president changes, thus continuity is a problem. Most international activities are with Europe followed by South America, North America and Central America. Inward student mobility remains low, those from outside the continent mainly from the US and with small numbers from Spain, France and Germany; the most are from neighbouring countries. Outward bound students go to the US followed by Spain and Germany, about half going to English speaking countries. Chile has a steady and significant 15-24 age cohort for the next thirty years and higher education participation and expenditure rates for secondary and primary (but not higher) education above regional averages and indeed above world averages. Chilean students pay fees for higher education and are used to doing so; fees rates are higher than they would expect to pay in many Western Europe countries (except the Netherlands). Chile must be an attractive market for student recruitment despite concerns re the quality of education in Chile and the need to strengthen quality assurance domestically.

Despite the recent devastating earthquake in Chile, the country must be an attractive student recruitment target for URV in areas of Sustainability and the Environment and Engineering and Computer Science. The large number of scholarships available for overseas study is a resource which should be tapped by URV via the establishment of links with Chilean universities (research cooperation, double degrees and student mobility) and the formation of relationships with the Chilean scholarship authority.

Mexico

Mexico is a similar story to many Central and Latin American countries; a large population, a large student population, a diverse private and public

sector (approximately 68% of students enrolled in contrast to Chile and Brazil) and in most respects lagging badly in internationalisation in higher education. Research and postgraduate work essentially is carried out in the public sector. "Internationalisation" is part of the 2001-2006 Mexican National Education Plan (latest available) as a means of improving the quality of education and of helping Mexican graduates to be more competitive globally. But funding and action is totally the responsibility of each institution. Most teachers in higher education are part time, funding is inadequate, the curriculum generally is traditional and out of touch with what is needed by the society and the economy and research profiles are low. CONACYT, the central scholarships authority does provide many scholarships for overseas study to Mexican students, the bulk to the UK and the US, followed by Spain, France, Canada and emerging competitors like Australia; individual institutions must be registered with CONACYT to be able to access the scholarships. Scholarships are awarded mainly in basic science, biological sciences, social sciences, engineering and technology. The public sector provides 90% of the scholarship holders and there is a return rate of 95%. Many become teachers in the Mexican higher education system. CONACYT supported research projects are with Germany, France, Spain and the US predominantly. Student mobility is much higher in the private sector and the US is the key destination, followed by Europe, Canada and Latin America. Private institutions like Tech de Monterey (ITESM) have been extremely innovative and active in internationalisation, that particular institution being a member of Universitas 21 and very active in joint programs and student mobility. For example, they have distance operations with other countries and offices in a number of countries and plans to offer higher education to the large Mexican communities in the US, plus operating a virtual university. The global private for-profit university providers Sylvan and Apollo have entered Mexico – as they have elsewhere in Europe, Asia and South America to provide more competition as the public sector cannot meet demand. The Netherlands has established a NUFFIC Office in Mexico as they see it as one of the target countries to recruit international fee paying students to Holland. Inward bound students are found mainly in the private sector and come primarily from North and Latin America. University students must have English language as an entry requirement, however, there is little importance placed on English during university studies and that is a problem for staff and student mobility and cooperation. Spanish language is taught in some universities. Note that Mexico is an associate member of the EU and this opens opportunities especially with countries like Spain because of the language connection. The existing connections between Mexican and foreign universities tend to be in economics, business and management at the undergraduate level and at the post graduate level in the social sciences, basic sciences and engineering.

Mexico must be a target country for URV international student recruitment. It has a generous scholarship scheme (CONACYT) for overseas study and URV should register for the program. There is postgraduate demand in URV areas of strength and capacity, namely, Basic Sciences (including Chemistry), Engineering, Environmental Sciences and Sustainability and Computer Science. The potential for Tourism needs to be explored within the private sector in Mexico.

Colombia

Colombia shares the same characteristics as many of its neighbours; a low higher education participation rate of 21%, a dependence upon the private higher education sector (58% of students are enrolled in the private higher education sector), a relative lack of research capacity and of full time university professors, a need to travel and study overseas for research training and an unequal society in which higher education participation is heavily biased to the wealthy. As is common throughout Latin America, the cost of higher education is much higher than OECD averages (29% compared to 19%). On the other hand English is the language of instruction in much of higher education (Spanish being the official language) and there is considerable outward student mobility (and low inward student mobility). Countries like Australia have had much success over the last ten recruiting fee paying students from Colombia for study at undergraduate and postgraduate level in a range of Humanities/Social Sciences and Science and Business programs. This recruitment has been mainly from the private sector and via the use of local education agents.

Colombia is a potential market for URV, but this Report places its priority lower than Chile and Mexico unless URV has existing good university partnerships and contacts in Colombia. The basic Sciences and Engineering and Technology are the priority areas upon which to focus.

What Masters programs are being offered in Spanish and English by URV which could fit **Priority target countries for URV Masters programs following upon the analysis**

Brazil
 Chile
 Mexico
 Colombia

Romania (existing relationship)

China

North Africa – Morocco, Tunisia

Low income countries targeted by Spain and Catalonia for aid/scholarship programs and where URV has existing connections

Individual students will continue to enrol from many other countries especially when URV has an improved University website and an improved international profile via research performance and via the new social media. For example, Spanish speakers from Europe or Latin America will come to URV to study the Tourism Masters in Spanish.

Erasmus Mundus Masters cooperation in the areas noted above will also be part of the strategy of attracting more international students.

Archaeology/Classical Studies is a strength of URV and of the Research Centre combined and Tarragona is an ideal location for postgraduate study and research. This is a specialist area of limited student demand and there seems little value in marketing the programs per se; however, an improved website and an e- campaign to introduce URV to a wider audience plus the continued pursuit of Erasmus Mundus cooperation would be the most efficient way to proceed in the field of Archaeology/Classical Studies.

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