

BFUG Network “Information and Promotion”

Report for the BFUG meeting in Cracow, Poland, 13-14 October 2011
2010 – 2012 BFUG Work plan

Background

The Bologna Declaration (1999) sets out “the objective of increasing the international competitiveness of the European system of higher education” and points out the need “to ensure that the European higher education system acquires a world-wide degree of attraction”, a goal which has been further pursued in the Ministerial Meetings of Prague, Berlin and, in particular, Bergen.

With the Leuven/Louvain-la-Neuve Communiqué¹ (2009), the ministers responsible for higher education in the countries of the Bologna Process convened to set up a network within the BFUG, “for better information on and promotion of the Bologna Process outside the EHEA while making optimal use of the existing structures”.

The network is open to all 47 Bologna countries, the European Commission, the consultative members as well as the Academic Cooperation Association (ACA) and the European Association of International Education (EAIE). Like the other BFUG Working Groups, it is supported in its activity by the Bologna Follow-Up Group Secretariat.

The main **purposes of the Network**, according to its Terms of Reference (ToR), are:

- Provision of clear and consistent information on the Bologna Process and the European Higher Education Area (EHEA) in countries outside the EHEA.
- Enhancing the international promotion of the European Higher Education Area.
- Putting the promotion of national higher education systems in a European context.

In addition to the network’s purpose, the BFUG endorsed the following **specific tasks** for the IPN 2010-2012 timeframe:

¹ All communiqués from the Ministerial Conferences are available here:
<http://www.ehea.info/article-details.aspx?ArticleId=43>

- Develop an overview of existing initiatives/activities by all members of the network in the field of promotion of national higher education systems & the EHEA (state of the art).
- Support the Bologna Secretariat and the Working Group “International Openness: European Higher Education in a Global Context” regarding the further development of specific information material (to be used e.g. at international fairs and visits) and of the EHEA Website for a global audience.
- Design measures to enhance the promotion of the EHEA and of national higher education systems as part of the EHEA.
- Foster the exchange of good practice and know-how as well as peer-learning in the field of national-level promotion of higher education in a European context.
- Advise/support the Working Group “International Openness: European Higher Education in a Global Context” in convening a round table (with the participation of the European Commission and other main actors in higher education promotion in Europe) to devise a “road map” and to identify opportunities and actions for enhancing European-level promotion.

The IPN’s Terms of Reference are provided in Annex 1 to the report.

At first sight, the objectives of the Information and Promotion Network seemed achievable within the 2010-2012 timeframe. However, when tackling each IPN task as specified in the ToR, the network members repeatedly faced serious challenges, which slowed and hindered further advancement. The root causes from which these challenges stem are manifold and diverse. Wanting precision in the terminology of the original ToR, unspecified framework conditions for the work of the group (open questions such as the target audience of any IPN activity), the mixed backgrounds of the IPN members, which sometimes engendered a mismatch between the expertise needed for addressing the specific tasks and the available know-how and time resources (also pointed out in a members re-nomination call), the voluntary nature of the network, the complicated online interaction of an intergovernmental network structure, the lack of financial support and the extremely diverse situation and needs of the EHEA members with regard to HE information provision/ promotion. Due to the group’s on going grappling with the IPN’s objectives and framework conditions the set-up of the network was adopted accordingly. Starting out with a sub-working group structure along specific tasks proved unsatisfying. Consequently a network-wide approach was re-adopted.

With this in mind, the IPN members concluded that the current report and its annexes, along with the follow up recommendations, shall provide the basis for future cooperation in the area. It has to be noted, however, that any progress will be predicated on the provision of sufficient financial and human resources and sustained political backing by EHEA countries, declared, for example, in the form of ministerial support and thus expressing an EHEA-wide impulse to join forces with a view to position the EHEA on the global educational map.

Network chronological activity and main outcomes

The **BFUG Network "Information and Promotion"** met for the first time in Vienna, Austria on 28 May 2010 and debated on its working activity for the coming two years, including the election of three Co-Chairs: Hubert Dürstein representing Austria, Heli Aru representing Estonia and Magalie Soenen representing the Flemish Community of Belgium, as well as the organization of the IPN in three sub-working groups.

The Co-Chairs plus other two members: Panikos Giorgoudes from Cyprus and Katalin Kurucz on behalf of Hungary formed the IPN Steering Committee with a mandate for a period of two years. The Steering Committee had its first meeting on 7 July 2010 in Bucharest, and developed the work plan of the network for the 2010-2012 timeframe. (The work plan is Annex 2 of this report).

In line with the Terms of Reference and the agreed work plan, on 17 December 2010, in Bonn, the DAAD (the German Academic Exchange Service) hosted one of the network`s sub-working groups meeting, in which the findings of the IPN Survey Questionnaire, conducted by DAAD were discussed. One main conclusion arising from the discussions was that the final IPN Survey Report² - as shown in Annex 3- would be accessible to the wider public on the EHEA official website. According to the decision taken by the BFUG during its meeting in Gödöllő (17-18 March 2011), the IPN Survey Report was deemed of public interest and was posted on the EHEA Website.

Considering the findings of the IPN Survey Report, the IPN members agreed on several recommendations that should be taken into account for furthering the fulfilment of the IPN objectives:

- Create a website about the EHEA (targeted towards potential students and young researchers from outside of Europe) and explore the link to the already existing "Study in Europe" platform.
- Develop information "packages" about the EHEA (to be used on other websites, press etc.).
- Distribute information with key messages (on how to market EHEA Higher Education Institutions - HEIs) to National Agencies and HEIs.
- Conduct research in key markets about perception of Europe (e.g. perceived benefits, obstacles to studying in the EHEA).
- Build ties across borders and organisations dealing with higher education marketing (e.g. "hot topic" conferences, marketing networks, international fairs).
- Provide funds for these activities by accessing existing funding sources (e.g. Erasmus Mundus A3, national/regional resources).

A second working group meeting, billed as an **Information and Promotion Expert Roundtable** (thus delivering on what has been defined as a specific task for the IPN

² The full version of the IPN Survey Report can be downloaded here:

<http://www.ehea.info/Uploads/presentations/IPN%20Survey%20Report%2025%20March%202011.pdf>

2010-2012 timeframe by the BFUG) was organised by the OeAD (Austrian Agency for International Cooperation in Education and Research) on 17 January 2011, in Vienna. The roundtable meeting helped put into focus the working group's loose ends and as an upshot of the lively discussion a catalogue of questions was designed by the OeAD. The catalogue listed open questions related to mandate, direction and interpretations of key IPN concepts. It was discussed at the following IPN meeting along with the IPN Survey Report, on 11 March 2011, in Brussels, Belgium.

Having answered the catalogue's questions the IPN members agreed that the primary aim of the IPN should be to promote the EHEA as both a strong competitor and an attractive partner and that the primary target group of the IPN in all its activities should be non-EHEA students and young researchers. It was further proposed that the IPN shall make use of the messages developed by the Global Promotion Project as an established starting point (quality, diversity, European dimension). Moreover, the members agreed that the IPN should push **both** promotion through key messages that could complement national slogans **and** information through key data. In this respect it was agreed to form a taskforce empowered with defining the key messages and the key data for an EHEA promotion.

The IPN members met again on 18 May 2011 in Brussels, with an agenda that streamed the debates towards the IPN taskforce deliverables and the follow up actions which are to be recommended for the upcoming BFUG meeting in Cracow. The representatives from the Council of Europe and the European Commission expressed their support for the work carried out with the EHEA information and promotion proposes. Moreover, the Commission suggested the possibility, subject to the approval of its member states, of introducing a priority under the Erasmus Mundus Action 3 annual open call for proposals for the creation and training of a network of marketing professionals. As an outcome of the meeting, the IPN members decided to put forward an activity report for the upcoming BFUG meeting in Cracow and address the recommendations concluded by the network regarding the follow up actions envisaged for the IPN.

Overview of the IPN mandate fulfilment according to the Terms of Reference (ToR)

According to the mandate given by the BFUG, the IPN pursued each of the specific activities included in its ToR, as follows:

1. Developing an overview of existing initiatives/activities by all members of the network in the field of promotion of national higher education systems & the EHEA (state of the art).

Considering this specific task, an EHEA wide survey was elaborated and conducted by the DAAD on behalf of the IPN. The objective was to have an overview of what activities were being undertaken, who was involved in higher education marketing, what tools were being used and if any marketing was being done that related specifically to the EHEA.

The number of responses received was thirty six out of the forty seven EHEA countries. The results of the survey underline the diversity of European higher education systems, as well as different reactions to a quickly changing world in which global competition, shifting demographics and student flows, international rankings and increasing professionalisation (some may say commercialisation) have begun to impact on the day-to-day business of universities across Europe. In the face of these new challenges and opportunities, some of the key findings from the survey regarding the international higher education marketing in the EHEA are as follows:

- " International marketing is widespread across the EHEA, but it takes different forms, has different focuses and varying degrees of intensity from country to country.
- " Most HEIs or countries focus on a handful of key geographic target markets for their international marketing efforts.
- " At national level, many EHEA countries have national agencies focused on higher education marketing as well as departments in one or more federal ministries.
- " A broad range of marketing tools are used by HEIs and the most popular are familiar tools such as leaflets/brochures, fairs and websites.
- " There is a large degree of participation in pan-European marketing and promotional efforts such as the European Higher Education Fairs (EHEFs) or activities as part of EU-funded programs such as Erasmus Mundus.
- " There seems to be broad agreement on key messages about the EHEA, such as quality of higher education institutions, diversity, and quality of life/culture. There is less agreement about the benefit of EHEA-wide marketing efforts versus national or institutional undertakings.
- " There is not yet a common language about marketing within the EHEA and terms can have very different meanings when put in different national contexts.

The full overview of these initiatives can be found in the complete IPN survey report, available on the EHEA website and as Annex 3 of this report.

2. Support the Bologna Secretariat and the Working Group "International Openness: European Higher Education in a Global Context" regarding the further development of specific information material (to be used e.g. at international fairs and visits) and of the EHEA Website for a global audience.

For the fulfilment of this task, the IPN members agreed with the Steering Committee proposal and formed a **task force** chaired by Ireland which included DAAD, EUA, ACA, Estonia and Armenia. The task force worked on developing information packages shaped as key messages and key data needed for EHEA information provision purposes. The EC offered to distribute information packages from its "Study in Europe" stands. Furthermore, the EC reminded the network that the messages and material available on the "Study in Europe" website could also be used when developing the information packages. The task force results accompany the report as Annex 4 of the present report.

Furthermore, the IPN members agreed that *creating a website about the EHEA that is targeted towards potential students from outside of Europe (and explore the link to the already existing "Study in Europe")* is unlikely to succeed **without solid financial**

investments by the EHEA members, which would ensure the long term sustainability and continuous update of such an initiative. Apart from providing the European Commission with the information packages with the purpose of including them in the "Study in Europe" web page, any potential actions about a permanent EHEA information/promotion website will be integrated in an EHEA **Promotion Strategy Project** application, drafted by the OeAD (The draft Promotion Strategy Project is Annex 5 of the present report).

3. Design measures to enhance the promotion of the EHEA and of national higher education systems as part of the EHEA.

One approach of the IPN towards enhancing the promotion of the EHEA and of national higher education systems was to empower the IPN task force with **defining the key messages and the key data for an EHEA promotion**. In this context, Recognition, Quality, European Dimension and Diversity were considered as key features of the EHEA.

In addition to the existing promotion actions of national higher education systems, such as Higher Education Fairs, website marketing, social web, brochures and personal contacts³ which are widely used as promotion methods by most HEIs, the IPN survey report underlines that a coordinated EHEA promotion strategy lacks at present. In this respect, there is scope for cooperation within the frame of the Action 3 of the Erasmus Mundus Programme⁴ to develop a network of marketing professionals across the EHEA, as part of an EHEA Promotion Strategy Project. Within the IPN debates, it was continuously pointed out that finding the right balance between national and European targets for HE promotion is a shared challenge.

Furthering the debates on enhancing the promotion of the EHEA, the IPN agreed that a coherent EHEA promotion strategy is needed for the continuity of the IPN work. In this respect the IPN further agreed to draft a project proposal with the aim of enhancing the promotion of EHEA. The OeAD volunteered to elaborate a project proposal and to coordinate the project if such a proposal will be endorsed by the International Openness WG and the BFUG and if the funding will be secured. The project will strive to devise **an EHEA-encompassing, politically-backed, forward-looking Promotion Strategy** which will **enhance visibility and prestige of the EHEA worldwide**. The project will operate as an **expert group** with a clear mandate and political support. The IPN's future role in this setting would be to act as a consultative body that the project team reports to and cooperates closely with.

4. Foster the exchange of good practice and know-how as well as peer learning in the field of national-level promotion of higher education in a European context.

³ Extract from the IPN survey report.

⁴ Further details on the Erasmus Mundus Programme, Action 3 can be accessed here: http://eacea.ec.europa.eu/erasmus_mundus/programme/action3_en.php

The IPN Survey conducted by the DAAD gave a first *overview of existing initiatives/activities in the field of promotion of national higher education systems & the EHEA*, carried by both national agencies and higher education institutions (HEIs) across the EHEA. Considering the recommendation from the IPN Survey report referring to *building ties between organizations and individuals dealing with international higher education marketing*, the IPN agreed that this activity could be covered in the future with an increased and more targeted European Union financial support for peer-learning activities, but also by increasing the information available at the EHEA website. In terms of seminars, conferences and European Higher Education Fairs, these types of events are happening anyway but not necessarily under a „Bologna hat“. Nevertheless, both EHEA and Bologna Process logos are used.

5. Advise/support the Working Group "International Openness: European Higher Education in a Global Context" in convening a round table (with the participation of the European Commission and other main actors in higher education promotion in Europe) to devise a "road map" and to identify opportunities and actions for enhancing European-level promotion.

On 17 January 2011, the OeAD hosted the **Information and Promotion Expert Roundtable** in Vienna. As it was recommended in the IPN ToR and Work plan, the roundtable brought together experts with different backgrounds for the EHEA information and promotion purpose: Erasmus Mundus Students and Alumni Association (EMA), Academic Cooperation Association (ACA), representatives of BFUG Working Groups on Mobility and Transparency Tools, the former Chair of BFUG WG International Openness, International Association of Universities (IAU), the German Academic Exchange Service (DAAD), representatives of the IPN Steering Committee, representatives of the Estonian Ministry of Education, an expert from The Knowledge Partnership, UK and the Bologna Secretariat.

As an outcome of the roundtable a catalogue listing pertinent questions was devised by the OeAD. It highlighted the essential questions that needed to be tackled by the IPN in order to gain a clearer sense of mission and overview of the IPN further steps.

The IPN envisaged a second roundtable meeting designed to benefit from the participation of the European Commission, the Academic Cooperation Association, the IPN Steering Committee, DAAD and OeAD, the International Openness (IO) WG Chair and the Bologna Secretariat. Unfortunately the Chair of the IO WG, Ms Luminita Nicolescu and the Commission delegate Mr Roger O`Keeffe could not attend the meeting. Nevertheless, the meeting generated tangible results. Starting from the catalogue of questions and the DAAD`s survey analysis, the IPN Steering Committee came up with concrete proposals with regard to the IPN further steps.

Proposed follow-up for the BFUG

When tackling the IPN specific tasks from its ToR, the IPN members concluded on the following:

- The primary aim of the IPN is to promote the EHEA as both a strong competitor and an attractive partner.
- The primary target groups of the IPN in all its activities are non-EHEA students and young researchers.
- The IPN should consider promoting the messages coming from the Global Promotion Project (GPP) as a start (quality, diversity, European Dimension).
- The IPN activity should focus on both **promotion** through key messages, which could complement national slogans and **information** through key data.

Considering the IPN purposes and its specific tasks in the frame of "*Provision of clear and consistent information on the Bologna Process and the European Higher Education Area (EHEA) in countries outside the EHEA together with enhancing the international promotion of the European Higher Education Area*" (IPN ToR), the BFUG members should consider a financial commitment backed up by the participation of promotion and marketing experts for the fulfilment of these broad political goals in a bid to achieve progress along this contested key issue of European higher education positioning.

As stated in the *Strategy for the European Higher Education Area in a Global Setting*,⁵ "To increase the attractiveness and the competitiveness of the EHEA, providing information on the Bologna Process will not itself be sufficient. Europe must also make concerted efforts to increase its international attractiveness to students, teachers and researchers across the world". In this context and based on the conclusions from previous IPN meetings, **the IPN recommends that the efforts for furthering the enhancement of the EHEA international promotion should be shaped in the frame of a project commissioned to design a possible EHEA Promotion Strategy⁶, to be endorsed by the BFUG.**

Should the BFUG and the ministers support the launch of such a project, the IPN will act as a consultative body for the project team. Otherwise, the IPN has reached its organisational limits and part of its task of fostering peer learning for enabling EHEA level information/ promotion could be done in the frame of trainings.

It is further recommended that the BFUG should take the expertise factor into consideration when nominating group or network members since particular tasks require expert input.

In addition to the above recommendations, the IPN calls upon the BFUG to be more supportive towards the participation and the organization of European Higher Education Fairs.

Finally, the IPN recommends the wide dissemination of the IPN survey results, as well as the use of the EHEA key messages and key data in all national and institutional level information provision or promotional activities.

⁵ The strategy was adopted at the Ministerial conference in May 2007 in London, by Higher Education Ministers and is accessible here: <http://www.ehea.info/Uploads/Global%20context/Strategy-for-EHEA-in-global-setting.pdf>

⁶ The EHEA Promotion Strategy project proposal is included as annex 5 to the IPN report.

The IPN report is accompanied by the following documents as annex

- 1.** The IPN Term of Reference
- 2.** The IPN work plan for the 2010-2012 timeframe
- 3.** The IPN Survey Report elaborated by DAAD
- 4.** The IPN taskforce deliverables
- 5.** The EHEA Promotion Strategy project proposal elaborated by OeAD

Annex 8: Terms of reference

EHEA Information and Promotion Network
Contact persons (Chairs) Three co-chairs to be elected among the members of the network, taking into account geographical diversity and different levels of expertise/different traditions in higher education promotion. 2010-2012: Austria, Belgium/Flemish Community, Estonia
Composition <ul style="list-style-type: none">➤ Open to all 47 countries, European Commission and consultative members, representatives nominated by the respective BFUG members➤ Bologna Secretariat➤ Academic Cooperation Association (ACA)➤ European Association of International Education (EAIE)
Purpose and/or outcome <ul style="list-style-type: none">➤ Provision of clear and consistent information on the Bologna Process and the European Higher Education Area (EHEA) in countries outside the EHEA.➤ Enhancing the international promotion of the European Higher Education Area.➤ Putting the promotion of national higher education systems in a European context.
Reference to the Leuven/Louvain-la-Neuve Communiqué Paragraph 26: "BFUG is asked [...] To set up a network, making optimal use of existing structures, for better information on and promotion of the Bologna Process outside the EHEA";
Specific tasks <ul style="list-style-type: none">➤ Develop an overview of existing initiatives/activities by all members of the network in the field of promotion of national higher education systems & the EHEA (state of the art);➤ Support the Bologna Secretariat and the Working group "International Openness: European Higher Education in a Global Context" regarding the further development of specific information material (to be used e.g. at international fairs and visits) and of the EHEA Website for a global audience.➤ Design measures to enhance the promotion of the EHEA and of national higher education systems as part of the EHEA.➤ Foster the exchange of good practice and know-how as well as peer learning in the field of national-level promotion of higher education in a European context.➤ Advise/support the Working Group "International Openness: European Higher Education in a Global Context" in convening a round table (with the participation of the European Commission and other main actors in higher education promotion in Europe) to devise a "road map" and to identify opportunities and actions for enhancing European-level promotion.

Reporting

Minutes of the Network will be made available to the BFUG and its Working Group "International Openness: European Higher Education in a Global Context".

Regular updates should be given to the Working Group "International Openness: European higher education in a Global Context".

An activity report will be presented to the BFUG via its Working Group "International Openness: European Higher Education in a Global Context" in the second half of 2011.

Meeting schedule

First meeting: Vienna, 28 May 2010

Further dates to be agreed by the Network (preferably twice a year, ideally linked to other European/international events)

Liaison with other action lines

Additional remarks

Organisation of work:

At the first meeting of the Network, the three co-chairs will be elected, a detailed work programme and timetable will be agreed upon for the period up to mid-2012. Work will be divided among the participating countries and institutions so that for each portion of the work programme a country or organisation will take the lead and the work load is equally shared.

The current terms of reference might be re-examined after the Bucharest ministerial conference in April 2012. Any new specific activity to be developed beyond the current terms of reference should be agreed upon by the BFUG, on the basis of proposals to be made by the Working Group "International Openness: European Higher Education in a Global Context".

WORK PLAN 2010 - 2012

of the Information and Promotion Network (IPN)

Background information

Following its first meeting held in Vienna on 28th of May 2010 and the meeting of the IPN Steering Committee, the first IPN Work plan has been drafted. The work plan follows the main IPN tasks, as outlined in the agreed Terms of reference, and indicates the timeline for the IPN activities until the Bucharest 2012 Ministerial Conference. For a more effective fulfillment of the assumed tasks, the main IPN activities have been divided between three different working groups(not to be confused with the BFUG working groups), as outlined below.

As a final note, some of the areas of the workplan are still being developed and thus the document will be revised once a more complete overview of the task division and individual working groups activities' descriptions has been finalised.

Specific IPN tasks description according to the adopted IPN Terms of reference:

1. Develop an overview of existing initiatives/activities by all members of the network in the field of promotion of national higher education systems & the EHEA (state of the art);
2. Support the Bologna Secretariat and the Working group "International Openness: European Higher Education in a Global Context" regarding the further development of specific information material (to be used e.g. at international fairs and visits) and of the EHEA Website for a global audience.
3. Design measures to enhance the promotion of the EHEA and of national higher education systems as part of the EHEA.
4. Foster the exchange of good practice and know-how as well as peer-learning in the field of national-level promotion of higher education in a European context.
5. Advise/support the Working Group "International Openness: European Higher Education in a Global Context" in convening a round table (with the participation of the European Commission and other main actors in higher education promotion in Europe) to devise a "road map" and to identify opportunities and actions for enhancing European-level promotion.

IPN Working Groups (WG)

Working Group 1

Specific IPN tasks covered: 1

Chair: Irene Jansen, DAAD (Germany)

WG members: to be confirmed

Specific areas to be covered by the WG:

- National level information and promotion materials (and how it is used) and activities (the National members defining what is for the information and what is promotion – ask them to do the differentiation);
- Promotion of the EHEA from the side of the National level;
- What are the information gaps that they would like filled by EHEA sourced information? (some sort of needs analysis).

Roadmap:

1. DAAD will draft the consultation questionnaire (Date: end of October 2010) and send it to the IPN members for comments and feedback (answers to be received until 15 November 2010);
2. The reactions will be considered in a second draft version of the questionnaire which will be sent to the IPN members end of November 2010;
3. DAAD will incorporate input from the Expert Round Table to be held in Vienna in early December 2010.
4. DAAD will invite interested IPN members to meet in Bonn on 17th of December 2010 in order to discuss and finalise the questionnaire;
5. Soon after the Bologna Secretariat could send the final version of the questionnaire to the BFUG members
6. The responses (Date: end of January 2011) to the questionnaire will be analysed by DAAD (until end of February 2011).

Working Group 2

Specific IPN tasks covered: 2 and 3

Chair: to be confirmed

WG members: to be confirmed

Specific areas to be covered by the WG:

Aid in the build-up of the permanent EHEA website, especially the International Openness and Study in Europe sections.

Further developing targeted and specific information material (to be used e.g. at international fairs and visits).

Roadmap: to be confirmed

Working group 3

Specific IPN tasks covered: 5 and possibly 3

Chair: Hubert Duerrstein/ David Baldinger (OeAD), Austria

WG members: to be confirmed

Specific areas to be covered by the WG:

- To identify EHEA characteristics fit for promotion
- To define measures to tailor EHEA-promotional activities to specific interests, i.e. the fit between, in generic terms, the 'product' and the 'customer' as the same product might be positioned with different promotional spins depending on the target group.
- To further develop relevant definitions, e.g. promotion, with a view to providing input to the 2011 Round Table
- To identify promotional scenarios, i.e. target regions, target groups, etc?

Roadmap:

1. Convening an Expert Roundtable (ERT), as a kick-off, with maximum 10 participants, in order to:
 - Clarify the mandate of the working group and to lay out the parameters of the envisaged debate within WG3
 - agree on a work plan and further develop relevant definitions, e.g. promotion
 - Provide input to questionnaire prepared by the DAAD
 - receive a professional introduction to the differences between information and promotion and/or marketing

- Define measures to tailor promotional activities to specific interests, i.e. the fit between, in generic terms, the 'product' and the 'customer' as the same product might be positioned with different promotional spins depending on the target group.
 - Identify potential promotional scenarios, i.e. target regions, target groups, etc?
 - Establish whether the EHEA can be promoted as a whole and, building on key messages identified by the Global Promotion Project (GPP), identify EHEA characteristics, in a bid to create a pool of EHEA features which can then be tailored to specific needs (as, for example, Australia and Asia will be approached differently)
2. Engaging in a process to plan promotional activities for the future based on the assessment of the EHEA's promotion situation. Based on the (SWOT) analysis carried out by DAAD in WG 1, which should include external (who are the 'customers', 'competitors' and potential 'markets'?) and internal (what are 'resources' and potential 'constraints' etc.) factors, marketing objectives, i.e. specific goals and milestones, shall be established.
 3. A draft marketing strategy could be an overall aim of the WG 3 and provide input for the Round Table in autumn 2011. This strategy describes the WG's proposal of how the identified objectives might be achieved. Within the strategy specific details map out who does what, when, where and how. If within the capacity of the WG it might additionally suggest monitoring, control and evaluation procedures, while contingency plans might also be drafted, in case key variables change.

Overall Information and Promotion Network timeline (as of 22.10.2010)

2010	
Sept/ Oct	Circulate draft work programme
October	Feedback / input from the WG
	Send revised version of the work programme
	Call for participation in working groups
December 2010	Expert Round Table to be organised in Vienna (WG1)
17 December	First meeting of "overview" experts subgroup to discuss and analyse the questionnaire (WG3)
Tbc	Collection of information on existing materials and activities
Tbc	First meeting of WG2
2011	
February	IPN 2nd meeting
June	Activity report to WG on International Openness
September	Submission of WG report to BFUG
October / November	Round table on EHEA promotion
2012	
26-27th April	Ministerial Conference and 3rd Bologna Policy Forum

Overview of Current Marketing Initiatives by Higher Education Institutions (HEI) and National Agencies Within the European Higher Education Area (EHEA), Focusing on “Marketing the EHEA”

Report on survey results of survey carried out by DAAD for IPN Working Group 1. Initial survey results were presented in Bonn in December 2010 and Vienna in January 2011 by Irene Jansen.

Report prepared for IPN meeting in Brussels in March 2011
by Irene Jansen and Megan Brenn-White

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“We must in particular look at the objective of increasing the international competitiveness of the European system of higher education. The vitality and efficiency of any civilisation can be measured by the appeal that its culture has for other countries. We need to ensure that the European higher education system acquires a world-wide degree of attraction equal to our cultural and scientific traditions.”

—Bologna Declaration, 1999

1. Introduction

The European Higher Education Area (EHEA) is no longer the stuff of dreams and plans. Real students are studying in three-tiered degree systems across 47 countries, earning European Credit Transfer System (ECTS) credits, and beginning to realize the new opportunities that await them. People around the world are watching this transformation with great interest, particularly in light of increasing global competition between higher education institutions and systems for the best students and faculty. And European universities and organizations are already starting to communicate the benefits of studying or working within this vast and diverse higher education area to international students and researchers. This happens as within fairs and conferences to promote “Study in Europe” or in materials produced by individual countries or institutions. The first steps towards promoting the Bologna area and providing more information about the various offerings are now leading to a discussion of marketing in a broader sense.

Well-known demographic changes that will leave Europe with a significantly smaller “domestic” pool of students to draw from coupled with increasing global competition between higher education institutions (HEIs) and systems have made the initial call in the Bologna Declaration to “increase the international competitiveness” of European higher education seem all that more important. The mission of HEIs has not changed and they will continue to be called upon by societies to generate new knowledge, train the next generation of scholars, and prepare students for gainful employment. But the context in which HEIs operate has shifted noticeably. In this context where other countries, regions, and HEIs are reaching out more directly to international students, some form of communication about the unique benefits of study in Europe may become increasingly important.

This discussion does not take place in a vacuum. There is already a rich and diverse array of initiatives across the EHEA—at the institutional, national, and regional levels—to attract international students, raise profiles, and showcase the benefits of study, research, and life in Europe. The word “marketing”, as will be discussed later, can have a relatively broad meaning and the survey focused on one slice of that: activities intended to increase the attractiveness of Europe for international students. This by no means is intended to diminish the importance of initiatives intended to, for example, stem brain drain, recruit top faculty, design degree programs that will be attractive to international students, etc. It is simply one of the most important pieces of the puzzle and a first step at looking at what is being done in the EHEA already.

While higher education professionals may know at least a little bit about the Bologna Process and related changes and agreements, it is far less likely that the prospective students, scientists, researchers, professors, etc. that European institutions are so keen to attract have ever heard of the EHEA or the “Bologna Area”. If a brand can be defined as the way that other people think of something, does the “EHEA” even have a brand yet—within Europe or outside the boundaries of the 47 signatory countries? In spite of new commonalities in degree structures and the easier transferability of credits, the countries involved have significant differences in higher education governance.

In order to understand how the EHEA is currently being promoted internationally, the Information and Promotion Network (IPN) Steering Committee undertook a survey that would be a first step towards understanding to look at the way the individual signatory states are (or are not) spreading the word about the EHEA, either explicitly or as an implicit part of their national and institutional marketing activities.

The survey was answered by a diverse group of people in different roles in ministries, at universities, and at national agencies. Some of the surveys may have been answered by one person, and some may represent more collaborative efforts. Most importantly responses were received from 36 of the 47 EHEA countries, indicating serious and widespread interest in the topic. The respondents shared information about the wide variety of marketing tools that they use to promote their own systems and, sometimes, the EHEA, from participating in fairs and conferences to utilizing the vast resources of the Internet. They gave some insight into how higher education institutions (HEIs) in their country reach out to prospective students in different geographic regions—and why.

The truth is that higher education marketing is changing so quickly around the world that any survey results speak about only a specific point in time. Very quickly, a new region may rise as a hotbed for student recruitment, tuition fees for international students can be implemented/increased/decreased, a website or social network may demand some of the limited time and attention of marketing staff at universities or national organizations, and national or regional policies can provide dramatically more or less resources for marketing higher education.

And yet it is important to establish some sort of baseline of the current state of international higher education marketing across the EHEA. The intent of the survey was to ask and, at least partially, answer the questions: What is being done to market the EHEA? How is it being done? And, who's doing it?

Building a better understanding about what is already being done by individual countries and HEIs across the EHEA will not only provide a critical benchmark for which we can measure ourselves in years to come. It can also take a step towards creating a discussion about practical, attainable solutions for the EHEA to attract international students that take advantage of existing resources and efforts. Essentially, no national system or individual university will market the EHEA along with their own offering unless they see it as an added benefit. If that is the case, then who will market the EHEA? Or, maybe the better question is: What is the added benefit for all involved?

Note: This paper roughly follows the structure of the survey itself, but occasionally groups questions in more thematic subject areas. The survey itself is included in the Appendix and all references to results will include the survey question to which they refer.

1.1 Definitions

Because there is often an uneasy relationship between higher education and anything that seems overtly commercial, the words “marketing” or “promotion” are not as easy to talk about for many institutions as more familiar topics such as “research” or “excellence in teaching”. The respondents have varied professional backgrounds that would have informed how they understood the terms involved and how they answered the questions. As with many European ventures, starting with some common definitions can be helpful.

In this case, the word “promotion” was used to represent, “an overall effort to inform about the Bologna Process and promote it in various ways”, the term “information” was used to explain the publishing of data in a “neutral way”, and the term “marketing” was meant to represent the, “initiatives and tools that lend themselves to attracting students”. One of the goals in designing the survey was to make it accessible to

people who did not have marketing backgrounds themselves. There is a wide variety of tools that HEIs in the Bologna Area use to market themselves internationally, but they may not always explicitly define these tools as “marketing instruments” or be comfortable talking about these efforts in language derived from the business world.

In the context of this survey, marketing is used to specifically refer to various tools and initiatives that impact enhancing attractiveness in the interest of international student recruitment, whether for study abroad, bachelor’s, master’s, or doctoral degree programs.

One other important point to make is about the word “international”. It could be understood that “international student recruitment” would refer to students coming from outside of the EHEA. It is clear from a variety of the responses, however, that many of the respondents took this to mean any marketing done beyond their national borders. In a way, this is an affirmation of the Bologna Process, which was meant to increase both horizontal and vertical mobility within the EHEA, as well as to increase the attractiveness of the region for non-European students. It would be interesting to explore this question in more depth in future surveys, and to really tease out the differences between what is being done both inside and outside the borders of the EHEA.

1.2 Respondents

The survey was sent out 13 November 2010, from the German Academic Exchange Service (DAAD) through the IPN Steering Committee.

The following countries sent responses to the survey:

- Andorra
- Armenia
- Austria
- Belgium* (Flanders and Wallonia)
- Bosnia & Herzegovina
- Bulgaria
- Cyprus
- Czech Republic
- Denmark
- Estonia
- France
- Georgia
- Germany
- Holy See
- Hungary
- Iceland
- Ireland
- Italy
- Latvia
- Lithuania
- Luxembourg
- Malta
- Moldova
- Montenegro
- Netherlands
- Norway
- Poland
- Portugal
- Romania
- Scotland
- Slovak Republic
- Slovenia
- Spain
- Sweden
- Turkey
- United Kingdom

Not only does this list represent 37 of the 47 countries in the EHEA, it likely represents the countries that attract 90%+ of the international students that come to the EHEA every year.

There are large differences in the national systems that would impact their ability to recruit international students from tuition fees to the number and quality of English-language programs to the international reputation of their higher education systems or individual institutions. Even factors such as the attractiveness of the country as a tourist destination will impact their ability to recruit students from abroad.

The factors that determine the national contexts will impact how they market themselves, and how they see themselves as part of the EHEA.

1.3 National Agencies

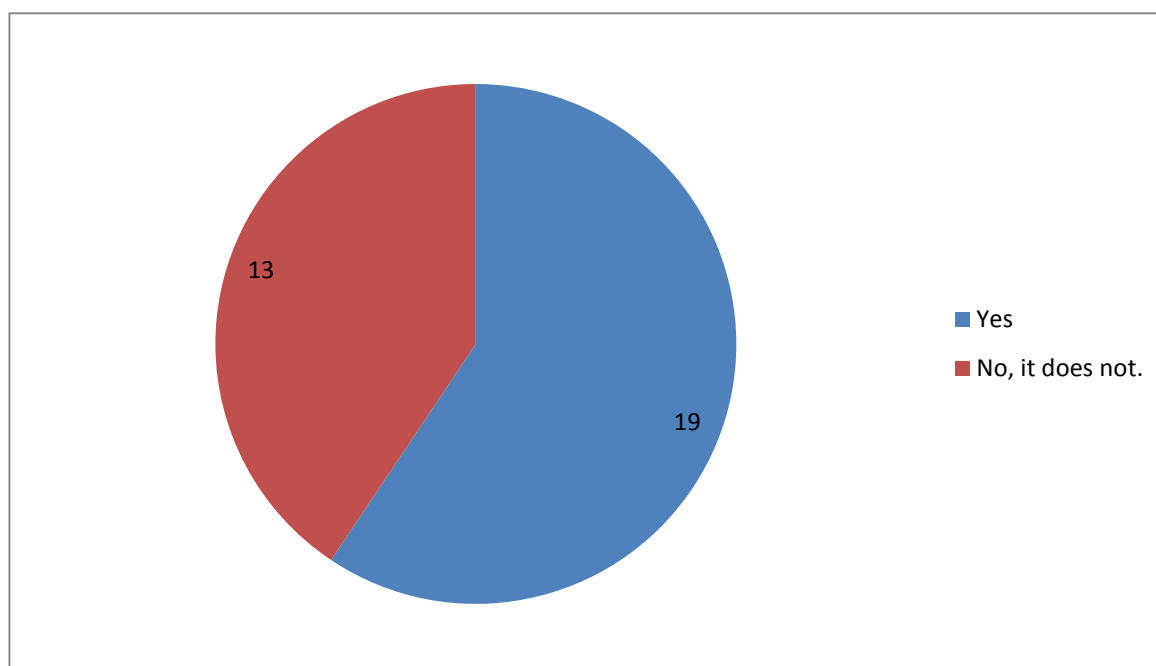
Twenty-two of the respondents named “national agencies” that were responsible for international higher education promotion in their countries in response to Survey Question #2.1. These are all publicly-funded agencies that work on a broad range of marketing and promotional activities to raise the profiles of their university systems as well as the individual universities in their countries, in addition to attracting students from abroad.

Looking at the list of agencies below it should be kept in mind that these agencies often have a large impact on international recruitment efforts, particularly in countries where tuition is low or non-existent for international students (which generally correlates quite closely with the amount of funds that the institutions themselves dedicate to international recruitment efforts). They may represent the bulk of the spending on international marketing for higher education, and can help set the agenda by how they spend these funds. These examples can give just some idea of the full spectrum of activities that these organizations undertake: they may give seminars and workshops, they may help organize stands at conferences, they may administer scholarship programs, they may run advertising campaigns, to name just a few.

National Agencies of Survey Respondents

- Austria: OeAD
- Belgium (Flemish): EPOS, FLAMENCO
- Belgium (French): Wallonia-Brussels Campus
- Bosnia and Herzegovina: Agency for development of higher education and quality assurance, Centre for diploma recognition and information
- Czech Republic: Centre for International Services / National Agency for European Educational Programmes
- Estonia: Study in Estonia
- France: CampusFrance
- Germany: DAAD
- Holy See: KAAD (in Germany)
- Hungary: Tempus Public Foundation
- Iceland: Office of International Education
- Ireland: Enterprise Ireland
- Latvia: Academic Information Centre, State Education Development Agency
- Lithuania: Education Exchanges Support Foundation
- Malta: National Commission for Higher Education (NCHE)
- Netherlands: Nuffic
- Norway: Norwegian Centre for International Cooperation in Higher Education (SIU)
- Poland: Project “Study in Poland”, implemented by the CRASP
- Slovakia: SlovAcademic Information Agency (SAIA)
- Spain: Universidad.es Foundation
- Sweden: The Swedish Institute
- Scotland / United Kingdom: British Council

Table 1. If your country has an agency (such as DAAD, CampusFrance or Nuffic), does this agency actively market EHEA? (Survey Question #9)



Total responses: 32

As can be seen in the table, a slight majority with national agencies said that these agencies also actively market the EHEA. Of the respondents who answered “yes” to the question of whether or not their national agency “actively markets the EHEA”, one said it was “to a great extent”, 12 “to a certain extent”, and six “to a lesser extent.” This indicates that at least some of the national agencies are involved in marketing the EHEA, but probably not to any significant extent. While it is almost certainly true that national agencies are not allocating limited resources towards promoting the EHEA itself, these responses may underestimate how often national agencies and HEIs promote their European location, including many important aspects of the EHEA such as increased mobility, etc.

To get a sense of how national agencies may market the EHEA, this is a selection of comments provided for this question:

- Belgium (FR): “As mentioned in questions 2.1 and 2.2, Wallonia-Brussels Campus has just been established. If its primary goal is to inform and promote the HE of the French Community of Wallonia-Brussels, there is no doubt that there will be a focus on the European dimension and its integration within the EHEA, especially since Brussels is the capital of the EU.”
- Czech Republic: “The Centre for the International Services actively market the Czech higher education under the brand Study in the Czech Republic and this initiative is closely linked to the promotion of the European Erasmus Mundus programme in the Czech Republic (i.e. joint budget from the Ministry of Education for both activities). There is no active marketing of EHEA as such.”
- France: “The latest brochure by CampusFrance, entitled ‘Choose France, although emphasizing first ‘Choose France for your higher education’, also clearly puts forward the following comment: ‘Thoroughly European, distinctively French’.”
- Hungary: “There are two agencies active in the field of promotion of Hungarian HE abroad: Balassi Institute (www.bbi.hu) used to manage a short project called “Campus Hungary” which ended after financing ceased; its relaunch is now being considered. Balassi Institute also participated in an

Erasmus Mundus Action 4 project aimed at marketing the EHEA. They coordinate the network of Hungarian cultural institutes worldwide. Tempus Public Foundation (TPF) manages the community and regional programmes in education in Hungary (LLP, Erasmus Mundus, Tempus, CEEPUS) and is active in promoting internationalisation of Hungarian Higher Education and of mobility...TPF also participates in Erasmus Mundus projects and thus cooperates with other national EM national structures in promoting EM and the EHEA...Currently TPF is a partner in ASEMUNDUS and Euro-Asia.net projects coordinated by DAAD. These projects aim to enhance co-operation and mobility between European and Asian higher education by organising contact seminars before / parallel to EHEFs and other higher education fairs."

- Ireland: "The Irish agency, Enterprise Ireland, is in its early days of operations in terms of marketing for HEIs. Ireland's position in EHEA is a key message in this marketing. I expect this to remain so over the coming period."
- Latvia: "Our agencies are promoting Latvian higher education"
- Poland: "Foundation for the Development of Education System to certain extent plays such a role – organisation of Polish stand promoting Polish higher education and regional HEIs consortia at EAIE fairs."
- Scotland: "British Council and ECOTEC both do so for (different parts of) the lifelong learning programme"
- Sweden: "It would be hard to motivate using our limited funding for promotion of Sweden as a study destination to promote the EHEA."

1.4 Ministerial Departments Engaged in Higher Education Promotion

Just as the different countries within the EHEA may or may not have national agencies that work on international higher education marketing, there are different parts of the national government ministries themselves that have this activity in their portfolio. As is also the case with the national agencies, it cannot be concluded from the survey what kinds of activities these groups are engaged in, how much money they spend on higher education promotion, how many people are dedicated to these efforts, or what kinds of activities they undertake. Yet even looking at the list of names can give an indication of where this activity is situated within various government bodies.

The following government bodies were named in answer to Survey Question #2.2, "Does your country have a **ministerial department** that takes care of national **HE system promotion**?" (detailed responses can be seen in Section 3.2 "National Governments"):

- Andorra: Secretary of State for Higher Education and Research
- Austria: OeAD is commissioned by the Ministry
- Belgium (French): Ministry of the French Community, WBI
- Cyprus: Department of Higher and Tertiary Education – Ministry of Education and Culture
- Czech Republic: Department of Higher Education, Department of International Affairs
- Denmark: Study in Denmark
- Estonia: Archimedes Foundation (operates under Ministry of Education and Research)
- France: Departments in the Ministry of Foreign Affairs and the Ministry of Higher Education and Research
- Germany: „Internationale Büros“ (IB) of the Federal Ministry of Education and Research
- Holy See: New department for International Relations in the HE sector
- Hungary: Dept. for international educational issues within the newly established Ministry of National Resources

- Ireland: Department of Foreign Affairs
- Italy: Services of the Ministry of Education, University and Research
- Latvia: Ministry of Education and Science
- Lithuania: Department of Studies and Research in the Ministry of Education and Science
- Moldova: Academy of Science, Ministry of Education
- Montenegro: Ministry of Education and Science
- Poland: Bureau of the Minister in the Ministry of Science and Higher Education in cooperation with the Foundation for the Development of Education System
- Scotland: Funding for promotion of Scottish HE is provided through the Scottish Government Lifelong Learning Directorate
- Slovakia: Section of International Cooperation
- United Kingdom: Department of Business, Innovation and Services (BIS)

2. International Marketing Overview

The survey began with questions related to how international marketing—in general terms—is being undertaken by HEIs within a country, and moves on to how and if the EHEA or the “European context” are part of these efforts. There are two ways to look at the international marketing of the EHEA: 1) it equals the sum total of the national, regional, and institutional efforts plus any EHEA-wide initiatives that may come, or 2) it *only* happens when someone using the words “EHEA” markets the higher education area itself. Even in this case, it can be assumed that marketing for the EHEA, if it happens, is part of international marketing.

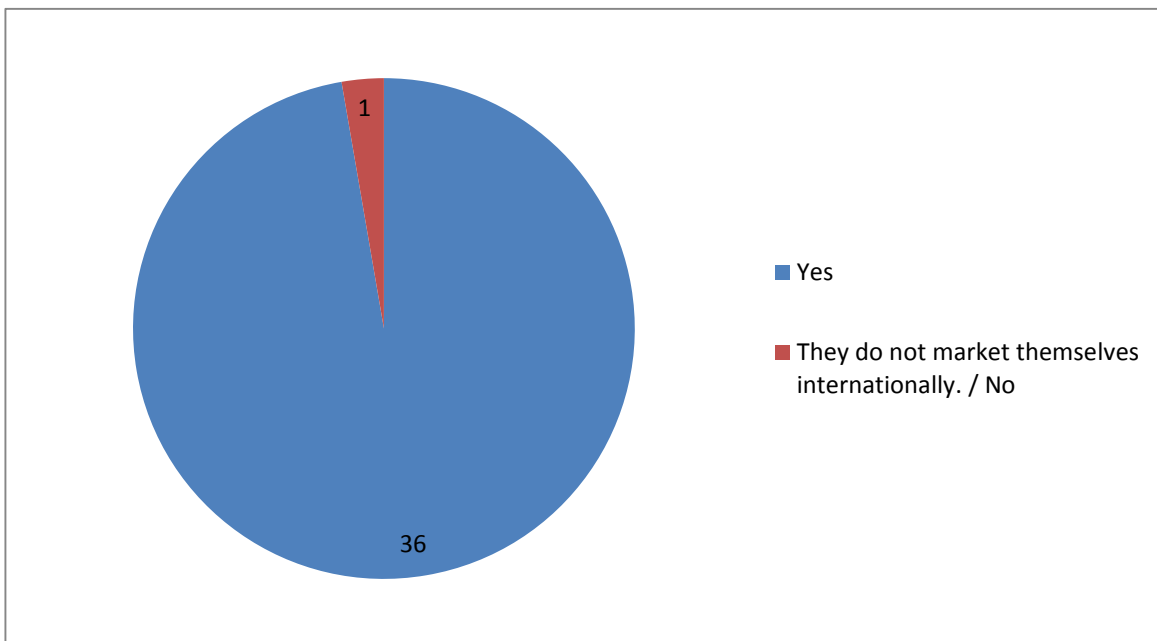
If the ultimate goal is to attract more students to the EHEA, however, the institutional and national efforts will almost certainly always have a greater impact than EHEA-wide initiatives, which is not to say that these efforts are not worth pursuing. The survey results revealed that there is already a rich diversity of international marketing efforts at the national and institutional level versus a relative dearth of marketing the EHEA itself, a fact that should not necessarily be viewed as negative. Efforts made at each level can have a cumulative effect on increasing the attractiveness of the EHEA for international students, although, of course, large differences in terms of marketing activities and budgets between EHEA countries and institutions could lead to international students going primarily to the places that do actively market their offerings.

The calculus of how an international student decides where to study is complex, however, and universities, countries, and regions can only try to present what they have in the best possible light. Some students will be attracted to a particular country because of the language—or their own heritage. Others will simply be looking for the best program with the best facilities at the best price. Many of these variables cannot be changed, so the goal of many of the existing marketing efforts is simply to get the word out about the advantages of the various institutions and systems so that international students will become aware of offerings beyond their own border.

2.1 Extent of International Marketing

As we can see from Table 2 below, every respondent but one said that the higher education institutions (HEIs) in their country do market themselves internationally. Of course, this question can be interpreted quite broadly, so it would have been unlikely that many respondents would answer that their HEIs do not market themselves internationally at all.

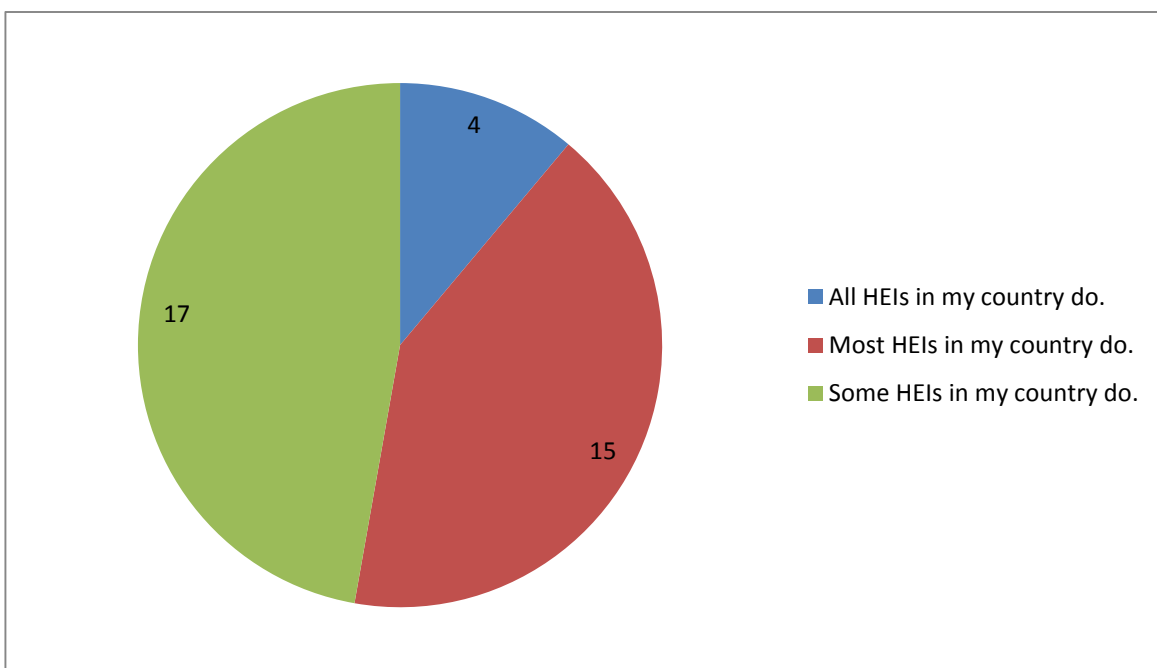
Table 2. Do HEIs in your country actively market themselves internationally? (Survey Question #1.1)



Total responses: 37

If one of the key purposes of this survey was to establish how widespread international marketing was for HEIs across the EHEA, the nearly unanimously positive response to this question shows that international marketing, of some sort, is ubiquitous.

Table 3. If yes, to which extent do HEIs in your country actively market themselves internationally? (Survey Question 1.1)



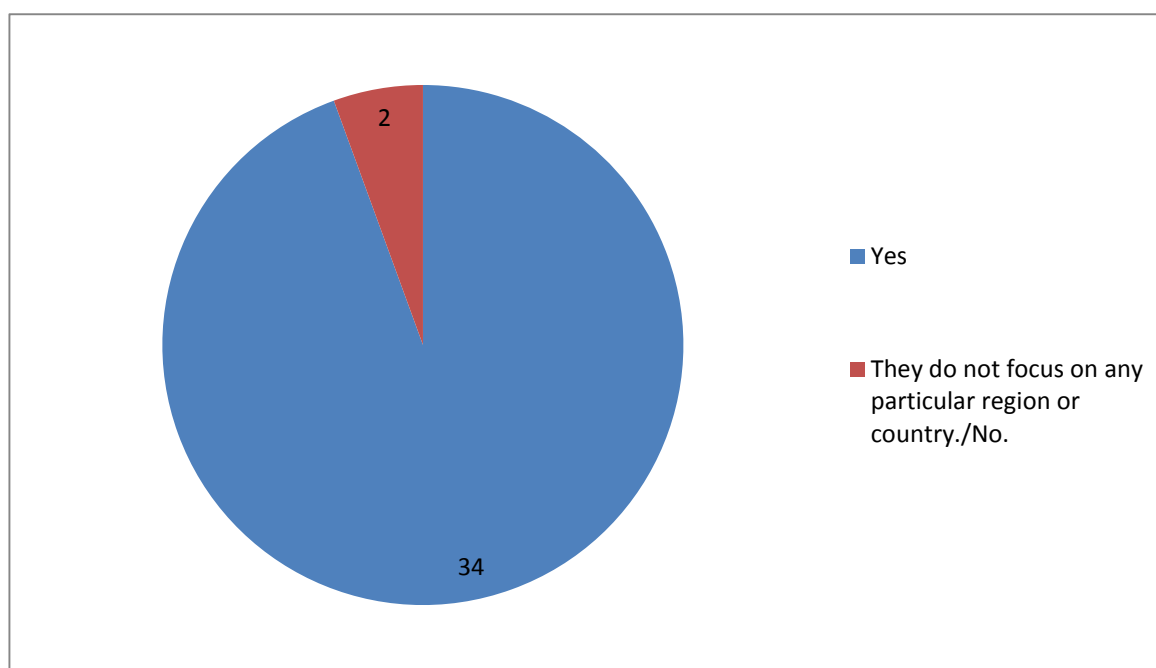
Total responses: 36

An additional follow up question for respondents who answered “Yes” to the first question shows that, while international marketing is widespread across the EHEA, only a slight majority said that “all” or “most” of the HEIs in their country do (see Table 3 above). It is important to also keep in mind that the respondents may understand the very term “higher education institution” differently. Some degree programs may be closed to international students or extremely difficult for them to apply, some institutions may see themselves as serving the local market (or even have that as a political mandate), and there may also be imperfect knowledge at the level of the respondent about activities at the individual institutions. That said, it is important that over half of the respondents answered that either “all” or “most” HEIs in their country market themselves abroad. The increase in competition between HEIs, the growth in English-taught degree programs, the increasing acceptance of marketing at universities, demographic changes in Europe reducing the number of domestic students, and other factors point to a likely increase in this percentage in the coming years.

2.2 Key Target Regions or Countries for International Marketing

As has been mentioned above, HEIs in different countries will have different goals when it comes to attracting international students. From creating more diverse institutions to increasing revenue from tuition to simply attracting the “best and the brightest”, the specific goals for international recruitment will also determine where these efforts are targeted. Questions 1.2 and 1.3 of the survey focused on these geographic target markets.

Table 4. Do HEIs in your country focus on particular regions or countries when promoting themselves internationally? (Survey Question #1.2)



Total responses: 36

The response to this question—with nearly every respondent answering that their HEIs do focus their international marketing on particular countries or regions—may be more revealing than at first glance. Having defined target markets shows that HEIs are thinking about marketing in a differentiated way that requires strategic planning and some high-level decision making. In most institutions, resources for international marketing (or any marketing) are scarce, so focusing these resources is an important step to

using them as effectively as possible. Knowing which regions are currently of most interest to HEIs in Europe will also help paint a picture of which countries may already be more informed about offerings in Europe and the EHEA—and what target markets for the EHEA as a whole may be.

Thirty of the respondents provided some additional information about the regions or countries that their HEIs were targeting and some clear trends emerged. Eleven of the 30 mentioned “Europe”, with many respondents naming specific countries such as Germany, Finland, Poland, Greece, Russia, etc. European regions were also mentioned by 10 respondents such as Scandinavia, “Mediterranean countries”, the Baltics, Central Europe, Northern Europe, former Soviet countries, Balkan region, and Eastern Europe (these numbers may overlap with the respondents mentioning “Europe” as some mentioned Europe as a whole as well as regions or countries). These responses make it clear that marketing within the EHEA is seen as “international” because it crosses national boundaries, a logical definition, but not, perhaps the one intended by this survey. Several respondents also mentioned that their HEIs market to prospective students in neighboring countries, which they may see as part of their larger region.

The next most popular region was Asia with nine respondents mentioning “Asia”, 10 mentioning “China”, seven mentioning “India”, and several mentioning other countries or regions such as Malaysia, Vietnam, Pakistan, and “South East Asia”. The United States came behind this with eight mentions, and the “Middle East” with six mentions. “South America” or “Latin America” was named five times. Some countries received mentions by one or two of the respondents, but no other regions or countries had any real critical mass.

Interestingly, these results would be quite hopeful for the project of mobility between EHEA members since there is a clear trend towards marketing within Europe. The interest in Asia is not surprising, given the large and growing numbers of internationally-mobile students from Asia. Because this question does not specifically refer to student recruitment (except in that the definition of marketing for the purposes of this study has to do with student recruitment), it may also be that the responses indicate some general “profile-raising” activities, particularly with countries that have strong research ties to the EHEA countries such as the US, China, and India.

2.3 Country-Specific Marketing Tools

Some of the 33 respondents who said that HEIs in their country do focus on specific regions or countries also answered Survey Question #1.3: “Are there special marketing measures or tools that could be recommended for these regions / countries?” The following responses were given, many of which also provide the first glimpse into which tools in general are most important in international marketing efforts for HEIs in the respondents’ countries:

- Belgium (FR): “The development of marketing measures or tools is at an early stage amongst the HEIs and the French Community Wallonia-Brussels of Belgium. However, we can mention websites and brochures/leaflets as the most common tools developed by HEIs and by the public authorities.”
- Bosnia and Herzegovina: “Websites, leaflets and brochures, outdoor advertisement”
- Bulgaria: “Advertisement, event marketing, websites, leaflets and brochures, university directories”
- Cyprus: “Advertisements (newspapers, magazines, radio/tv commercials), Leaflets/brochures, Exhibitions, Event marketing”
- Czech Republic: “personal contacts, alumni, university directories, fairs”
- Denmark: “The below mentioned measures are to a varying degree relevant for all the region/countries where Danish HEI promote themselves: Advertisements (print; i. e. in newspapers, journals, magazines, periodicals), Advertisements (online; f. e. static/animated banners, pop-up ads), Search engine advertising, Social media engagement (Facebook, LinkedIn, MySpace, Twitter,

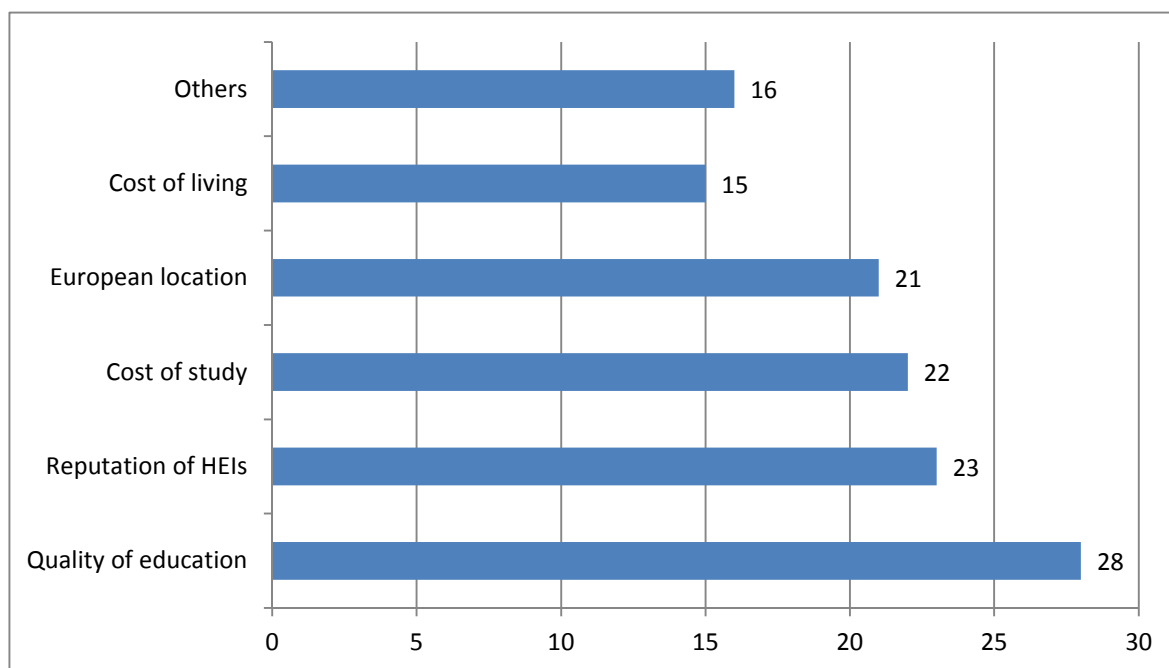
- Wikipedia, YouTube), Webinars, Websites, Leaflets and brochures, Postcards, University directories (catalogues which list universities and degree courses – print or online), Fairs and road shows, event marketing, merchandising and give-aways, press relations”
- Estonia: “The importance varies depending on the country: Education fairs, portals, social media, specialised editions, direct/event marketing”
 - Germany: “Asia: International and European Higher Education Fairs, advertisements on websites and in newsletters, direct mailing. Europe: Higher Education Fairs, advertisements in newsletters, and on websites, direct mailing. South America: European and German Higher Education Fairs, advertisements in newsletters and on websites”
 - Holy See: “For example, academic collaborations (affiliation with HEI in other countries) – we consider this not as “marketing” but as a service for academic development.”
 - Iceland: “studyiniceland.is a mutual homepage with access to all higher education institutions in the country, similar printed material, used at international fairs, like Nafsa and EAIE”
 - Italy: Responses were provided in a separate file and included Study in Italy websites, Euraxess, consortia, scholarship programs, welcome offices, and more.
 - Malta: “Network of representative agents, Participation in study fairs abroad”
 - Moldova: “Web sites, Leaflet and brochures, University directories (catalogues which list universities and degree courses – print or online)”
 - Montenegro: “Well arranged web site, flyers, information lists, press and media, advertising at seminars, conferences, workshops, promotion of our HEIs within established bilateral agreements, mobility programmes, cooperation programmes”
 - Netherlands: “knowing the local situation”
 - Norway: “Study fairs, such as NAFSA is being used by some institutions, and this will probably be the preferred activity also in the future”
 - Poland: “Visits to HEIs in order to meet people in person/ study visits to EEC, Joint seminars for EU HEIs, Event marketing for EEC and EU HEIs”
 - Romania: “International educational fairs, social networks, websites, leaflets, catalogues”
 - Scotland: “There have been Ministerial visits to particular countries, for example China. These have been made by the (Scottish) First Minister and the (Scottish) Cabinet Secretary for Education., Universities Scotland (the rectors’ conference) signed a memorandum of understanding with the Association of Indian Universities (AIU), which is the Indian Rectors’ conference, The British Council and Scottish Development International (SDI) also run focused missions to particular countries.”
 - Slovak Republic: “Direct contacts- visits of representatives of Slovak HEIs”
 - Sweden: “It is difficult to generalize in such big countries. China, India and the US are all continent sized countries and the kind of tools needed vary depending on which specific target groups one wishes to reach. In general social media is increasing in importance. Marketing [tools] constantly need to be assessed in today’s dynamic world. “
 - Turkey: “Websites, leaflets and brochures, educational fairs”
 - United Kingdom: “[The Prime Minister’s Initiative for International Education] (PMI) I and II campaigns, for instance”

2.4 Selling Points for HEIs in the EHEA

Given that there are so many differences between institutions and systems across the EHEA, it is to be expected that they focus on different factors when marketing their institutions and/or higher education systems internationally. As can be seen in Table 5 below, however, the “quality of education” was checked

by 28 of the 36 respondents to this question, and the “reputation of HEIs” was selected 23 times. It is clear from this that quality and reputation play an important role across national boundaries.

Table 5. Which parameters play an important role in your country’s international marketing endeavours? (Multiple answers possible) (Survey Question #1.4)



Total responses: 36

Cost of study was the third most selected option, and it is true that it is relatively low for international students in much of the EHEA compared to major markets such as the US and Australia. There are wide differences in the cost of tuition and fees for international students across the EHEA, as well as in the cost of living, yet this is an important factor for many countries (albeit one which has to be handled sensitively as “low cost” can often be understood as “low quality”).

Interestingly nearly the same number of respondents mentioned that the “European location” was part of their international marketing efforts, which shows the importance of the European context—as well as how attractive the HEIs think that Europe as a region is for international students. Again, this would not count, in the strictest sense, as marketing the EHEA itself, but the outcome is likely the same.

2.5 Additional selling points

Many of the respondents who had selected “others” specified a fairly wide variety of attributes that they utilized for international marketing. The answers are included here verbatim to give a clear sense of the diversity—as well as some of the common themes—across the EHEA. Again, the quality of education and the HEIs comes up frequently, as does the ability to visit other European countries, and programs taught in English.

- Belgium (NL): “Research Centre of Europe.”
- Belgium (FR): “Existing partnerships, individuals contact between lecturers/researchers, common interests in a specific research niche, etc.”

- Czech Republic: “Offer for foreign students (e.g. study programmes in foreign languages, various degree programmes, joint programmes).”
- Denmark: “Extensive provision of programmes taught in English, The Danish teaching and learning approach (THINK, PLAY, PARTICIPATE) providing skills for future careers: THINK = Independence, Problem-oriented learning, Specialisation, Challenges, Modern and up-to-date, Initiative, High quality, Professionalism; PLAY = Creativity, Innovation, Open-mindedness, Freedom, Informal environment, Quality of life, Experimentation; PARTICIPATE = Active participation, Responsibility, Dialogue, Teamwork, Engagement/commitment, Debate, Social responsibility, Consideration, Personal and social safety, Networks.”
- Estonia: “Highly developed IT solutions, as an attractiveness for the living conditions. Easy to travel to other countries, especially in the Northern Europe.”
- France: “Reputation of HEIs (especially “Grandes Ecoles” and well-known Universities), Culture : long cultural tradition and current cultural environment, Capacity for top research and innovation.”
- Georgia: “Flexible admission procedures for international students - the school-graduates who received secondary general education or education equal to it abroad and during last 2 years have been receiving general education abroad or students who have been living abroad during last two or more years and study at higher educational institution recognized by the legislation of that country are eligible to be admitted at accredited higher education institutions without passing unified national Exams pursuant regulations established by the ministry of education and Science of Georgia.”
- Germany: “Partnership approach (joint funding, balanced exchange, quality based programs...)”
- Holy See: “Service to the universal Church and societies in development.”
- Hungary: “For Hungarian minorities living in neighbouring countries: their mother tongue is Hungarian, and they can study in their mother tongue this way.”
- Ireland: “English language, safe environment, welcoming national culture.”
- Latvia: “Possibility of wide use of Russian language.”
- Norway: “Norwegian higher education is still free, which may be an even more important factor. In the future. General quality factors are also put forward, as well as the “Norwegian way” with a very student centered learning approach. In addition the climate and “exoticness” is actively used to attract international students.”
- Poland: “Distance between countries, probability for Polish origin citizens in secondary education sector.”
- Spain: “Language. Many people are attracted by learning Spanish, an increasingly growing important language.”

3. Who Markets HEIs?

The second section of the survey dealt with questions around what types of institutions and organizations that were involved in international marketing across the EHEA. It was assumed that in addition to the HEIs themselves, national agencies, departments within ministries, commercial agencies, and consortia could all play roles within various EHEA countries in international higher education marketing. The players would probably be roughly the same as in non EHEA-countries, although the types of responsibilities, levels of funding, and tasks vary from country to country and between Europe and other regions.

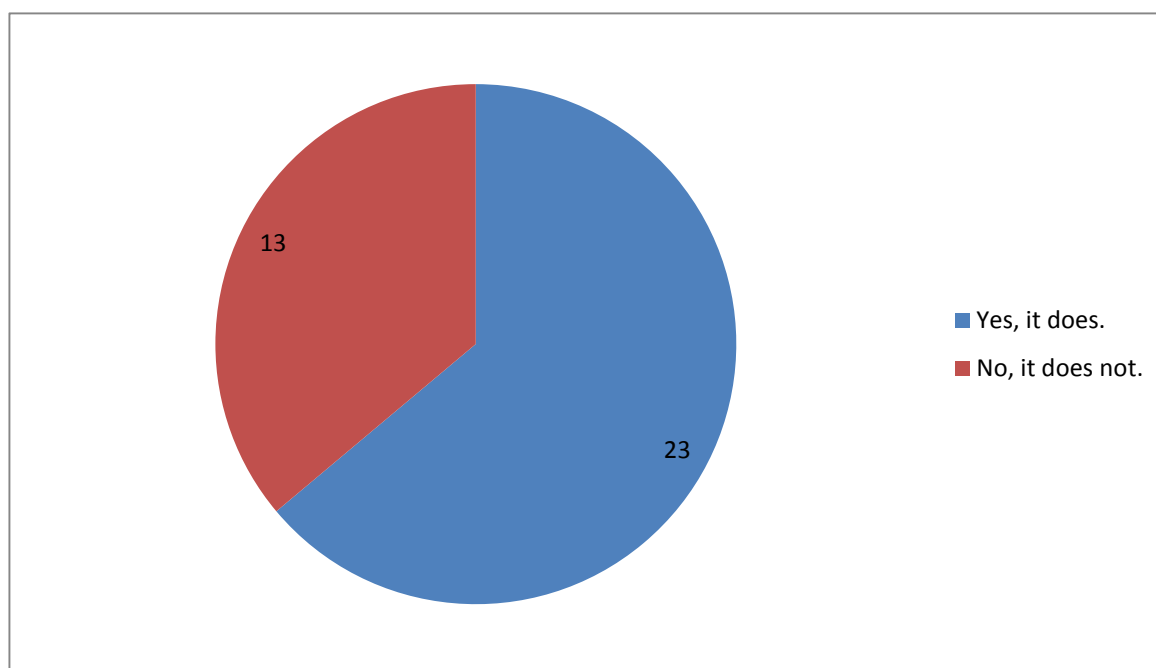
It should be noted that the questions (see Appendix for the full text of the survey) here were worded slightly differently, so the answers cannot truly be directly compared. What the survey wanted to find out was who was—in one way or another—engaged in marketing efforts. The first question about national agencies asked

if they “support HEIs in their marketing efforts”, it was asked whether commercial agencies “play a role in marketing efforts of HEIs”, whether or not the country has a “ministerial department that takes care of national HE system promotion”, etc. There are subtle but differences in whether the type of organization works with HEIs or the national system, whether they do marketing or promotion, whether they “play a role” or “take care of” it, etc. Particularly when dealing with non-native English speakers, it is difficult to know how these differences were interpreted. That said, the results are still illuminating.

3.1 National Agencies and HEI Marketing

As can be seen in Table 5 below, roughly two-thirds of the respondents said that they do have one or more government-funded (at least in part) NGOs that “help” HEIs with international marketing. The biggest of these organizations such as the German Academic Exchange Service (DAAD), CampusFrance, and the British Council have budgets that are in the hundreds of millions of dollars, although only a part of that may be strictly dedicated to international marketing efforts—even less specifically to supporting the HEIs in their marketing efforts. Some of these organizations are membership organizations that represent only the HEIs that are members, although their efforts likely help other HEIs in the same countries as well.

Table 5. Does your country have one or more national agencies (f. ex. non-governmental, but partially funded/commissioned by the government), like CampusFrance or DAAD for example, that support HEIs in their marketing efforts? (Survey Question #2.1)



Total responses: 36

The following responses were provided by the respondents answering the question on national agencies in the affirmative:

- Austria: “OeAD”
- Belgium (FR): “Following the work achieved so far by the coordination group on the attractiveness of the HE of the French Community Wallonia-Brussels of Belgium, Wallonia-Brussels International and the Ministry of the French Community of Belgium, in consultation with HEIs representatives, have decided to set up a new agency ‘Wallonia-Brussels Campus’. The agency formally exists since

October 2010. However, the first outcomes should be visible from the beginning of 2011, through the launch of a dedicated website and the participation in HE international fairs.”

- Belgium (NL): “For example EPOS (national agency for the Lifelong learning programme), FLAMENCO (Flanders Agency for Mobility and Cooperation in Higher Education)”
- Bosnia and Herzegovina: “Agency for development of higher education and quality assurance; Centre for diploma recognition and information”
- Czech Republic: “Centre for International Services / National Agency for European Educational Programmes responsible for the initiative Study in the Czech Republic”
- Estonia: “STUDY IN ESTONIA is coordinated by the Archimedes Foundation (www.studyinestonia.ee, www.archimedes.ee)”
- France: “Most FR HEIs get affiliated to CampusFrance which is the national agency for the promotion of French higher education abroad (www.campusfrance.org)”
- Germany: “DAAD”
- Holy See: “KAAD (in Germany) or other similar Church related institutions mostly for student support in many countries”
- Hungary: “Tempus Public Foundation (TPF) manages the community and regional programmes in education in Hungary (LLP, Erasmus Mundus, Tempus, CEEPUS) and is active in promoting internationalisation of Hungarian Higher Education and of mobility. It has been maintaining the Study in Hungary (www.studyinhungary.hu) website since 2000 that is active in promoting Hungary and Hungarian higher education abroad...” (Note: Response truncated for length.)
- Iceland: “Office of International Education, run by the University of Iceland and with an agreement with the Ministry of Education, Culture, and Science”
- Ireland: “Enterprise Ireland (the national exports promotion body)”
- Latvia: “Academic Information Centre, State Education Development Agency”
- Lithuania: “Education Exchanges Support Foundation (Lithuanian National LLP agency)”
- Malta: “The National Commission for Higher Education (NCHE) has proposed targets to attract 5,000 fee paying foreign students by 2020 in various fields of study and research. Hence the NCHE is supporting the University of Malta in its ambition to offer more Joint Degree programmes with other international universities through projects such as the Erasmus Mundus programme.”
- Netherlands: “For example it funds Nuffic and Netherlands Educational Support Offices in 10 countries abroad”
- Norway: “SIU, the Norwegian Centre for International Cooperation in Higher Education, has a special responsibility for promoting Norway as a study destination, particularly through the web site ‘Studyinnorway’ and through own participation at study fairs and coordinating the participation of HEIs on some occasions.”
- Poland: “The answer cannot be stated as Yes or No. There is no agency in our country which main objective is to support HEIs in their marketing efforts. But there is a project “Study in Poland” implemented by the CRASP (Conference of Rectors of Academic Schools in Poland). Some activities are undertaken by the Foundation for the Development of Education System acting as the National Agency for the LLP-Erasmus programme, Erasmus Mundus National Structure and Tempus National Contact Point. Additionally there are some regional consortia of HEIs established in order to do promotion and marketing for its members (for example Study in Kraków, Study in Wrocław, etc.)”
- Scotland: “The British Council (National Agency for Erasmus in the UK) promotes Scottish education overseas under the Education UK Scotland initiative.”
- Slovak Republic: “SlovAcademic Information Agency (SAIA), Ministry of Education”
- Spain: “Universidad.es Foundation”

- Sweden: “The Swedish Institute”
- United Kingdom: “British Council”

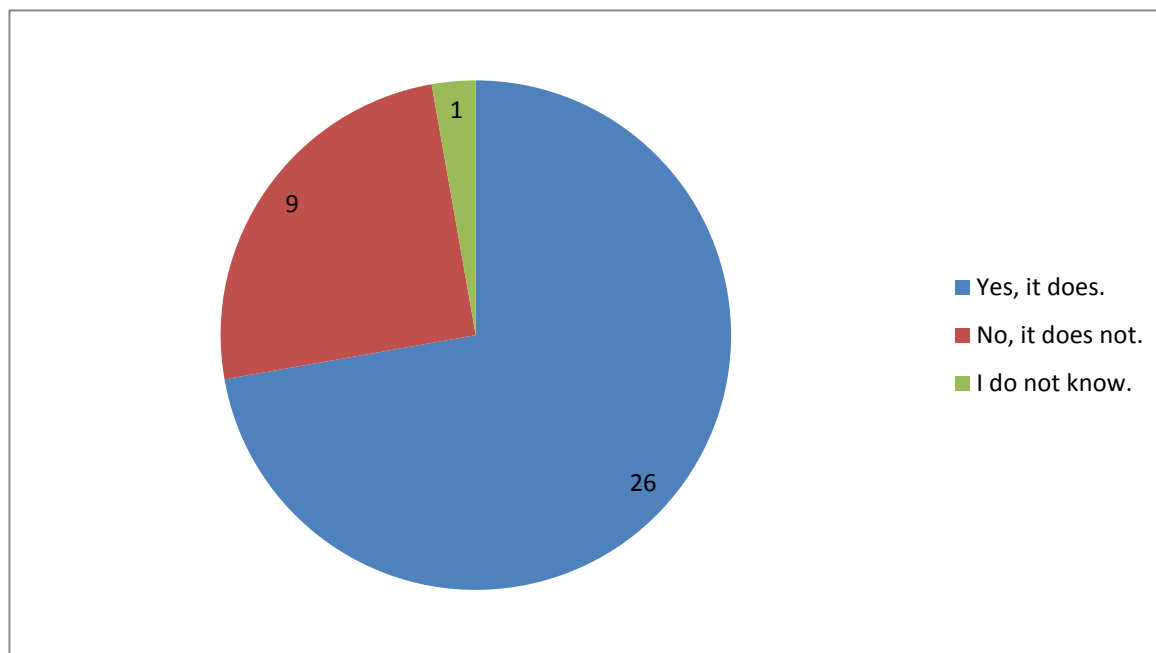
National agencies play a very visible role in some of the countries that are most active in terms of international student recruitment, particularly at international fairs and online. It would be interesting to dig deeper into the role of these agencies to see the relative scope of their activities in each country (providing information and training, organizing national stands at fairs, providing or administering grants and other programs, etc.) as well as to ask HEIs directly how important they think these efforts are in improving their ability to attract top international students.

In terms of promoting the EHEA, it is feasible that the existence of these national agencies, many of which have long histories of collaborating with each other, can make it much easier to create cross-border initiatives.

3.2 National Governments

All EHEA countries have some sort of national ministry that is responsible for higher education, which may or may not be combined with other portfolios—and which may or may not have “higher education” in the name. This federal role is evident even in countries where the responsibility for higher education lies in sub-national organizations, such as the “Länder” or state governments in Germany. There are also state ministries that could be responsible for the promotion of higher education, but it is unlikely that this question was understood that way by any significant number of respondents.

Table 6. Does your country have a ministerial department that takes care of national HE system promotion? (Survey Question #2.2)



Total responses: 36

It is likely that Table 6 indicates that a majority of countries do have departments in federal ministries that also have some role in the promotion for their national higher education system, although there is some chance that the “no” responses indicate countries where there are not federal ministries of education—or that respondents may have understood “national HE promotion” as promoting the HEIs domestically (as opposed to “international marketing”). It is somewhat difficult to imagine that such a large percentage of

respondents would have ministerial departments that “take care” of the promotion, which would imply a leading and hands-on role. That said, it is clear from the open-ended responses that the government funded national agencies are often overseen by the ministries and there are a variety of offices within ministries that take on this function.

From the responses, it is also clear that the most mentioned ministries are those that are responsible for foreign affairs and higher education and research, which is not surprising. It would be interesting to know a bit more about the role they play, including the extent to which they determine how national funds are spent on international marketing both for and within HEIs themselves.

The following are the open-ended responses provided by some of the respondents who answered the initial question in the affirmative:

- Andorra: “Secretary of State for Higher Education and Research”
- Austria: “OeAD is commissioned by the Ministry”
- Belgium (FR): “We should distinguish two different public entities: Wallonia-Brussels International is the public administration in charge of international relations for the French-speaking entities of Belgium, i.e. the French Community, the Walloon Region and the French-speaking community commission of the Brussels Region. The activities of WBI mainly concern bilateral/multilateral relations, external representation and some aspects of sectorial policies (including higher education). However, the Ministry of the French Community is also responsible for the international promotion/information on HE, but from a policy-making and following-up approach. Indeed, the Ministry is in charge of the following-up and implementation of European and international cooperation process (i.e. the Bologna Process, the ASEM Process, the Education and Training 2020 framework for the EU, etc.) but also of the information on HE system through the ENIC and NARIC networks. However, with the creation of Wallonia-Brussels Campus, under the joint responsibility of WBI and the Ministry, and in close cooperation with HEIs, promotion and information activities will be mainly in the hands of the new agency.”
- Cyprus: “Department of Higher and Tertiary Education – Ministry of Education and Culture – Cyprus”
- Czech Republic: “Department of Higher Education, Department of International Affairs”
- Denmark: “Danish Agency for International Education has a Study in Denmark office which operates to a large extent in the same way as DAAD, CampusFrance, NUFFIC etc.)”
- Estonia: “The Archimedes Foundation operates under the Ministry of Education and Research of Estonia”
- France: “CampusFrance’s activities and development are within the remit of and are closely followed up by 2 ministerial departments (Foreign Affairs and Higher Education/Research)
- Georgia: “There is no department directly at ministerial level, but this is National Education Quality Enhancement Centre which is in charge of disseminating information on national education system abroad.”
- Germany: “IB (*Internationale Büros* [Federal Ministry of Education and Research] (BMBF) a working group on mobility chaired by the BMBF has been established within the Bologna Follow-up Group”
- Holy See: “A new department for International relations in HE sector.”
- Hungary: “Following the recent restructuring of the Hungarian ministries (in 2010), the promotion of Hungarian higher education abroad has been added to the tasks of a department for international educational issues, within the newly established Ministry of National Resources that is responsible, among other fields, for higher education”

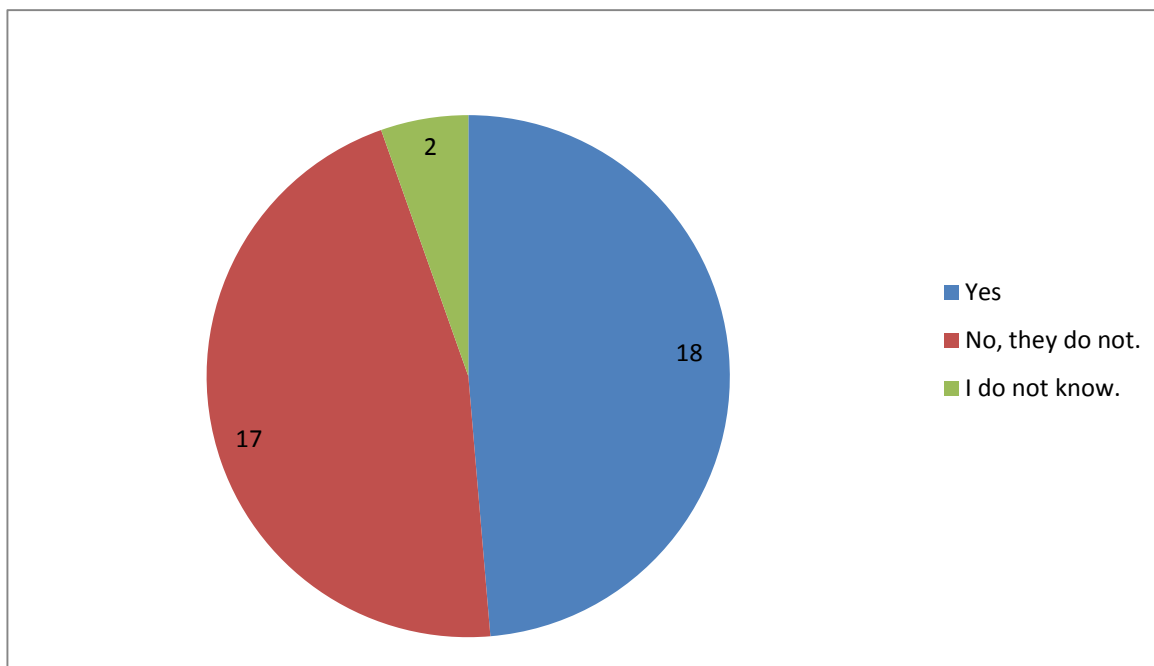
- Ireland: “The Department of Education is not directly involved in this promotion. However, the Department of Foreign Affairs is an important player in assisting with this promotion in key markets.”
- Italy: “The task is covered by different services of the Ministry of Education, University and Research”
- Latvia: “Ministry of Education and Science, Higher Education department”
- Lithuania: “Department of Studies and Research, Lithuanian Ministry of Education and Science”
- Moldova: “But at the same time, two departments of Ministry of Education: International Relations and European Integration Department and High Education Department are involved in promotion of national HE system. Besides the Ministry of Education, there is also the Academy of Sciences who takes care in promoting the HE, within the Department of International Cooperation.”
- Montenegro: “Within the Ministry of Education and Science of Montenegro there is Department for Higher Education which takes care about national HE system promotion. The best way of promotion is including our HEIs in different mobility programmes, stimulating cooperation through bilateral agreements or contracts with institutions in Region and wider. It supports our intentions to be active partner in EHEA effectively.”
- Norway: “No, it does not. However, The Ministry of Foreign Affairs through embassies and consulates play a certain role in this respect.”
- Poland: “Information and Promotion department have been closed down. Its role has been overtaken by the Bureau of Minister in the Ministry of Science and Higher Education in the cooperation with the Foundation for the Development of Education System.”
- Scotland: “Funding for promotion of Scottish HE is provided through the Scottish Government Lifelong Learning Directorate.”
- Slovak Republic: “Section of International Cooperation (www.studyinslovakia.sk)”
- Turkey: “to a limited extent”
- United Kingdom: “[Department for Business, Innovation and Skills] (BIS)”

3.3 Commercial Agencies

Just as marketing is not a word that everyone is comfortable with associating with higher education, the involvement of for-profit companies in general in HEI marketing may be seen with some skepticism. At the same time, many universities are comfortable working with external providers or consultancies to design and build websites, brochures, and flyers; to translate materials; to design and build booths for fairs; to assess the experience of international students on campus; to recruit students directly, etc. Many of these functions are critical to international marketing efforts, and many universities do not have the in house capacity to take on these types of tasks.

The use of agents to recruit international students, in particular, has raised red flags for a variety of reasons, yet is also a widespread and important practice for many HEIs in Europe and beyond. While the survey question asked more broadly about “commercial agencies”, it is likely that most respondents probably associated this with student recruitment agencies and training institutions.

Table 7. Do commercial agencies play a role in marketing efforts of HEIs? (Survey Question #2.3)



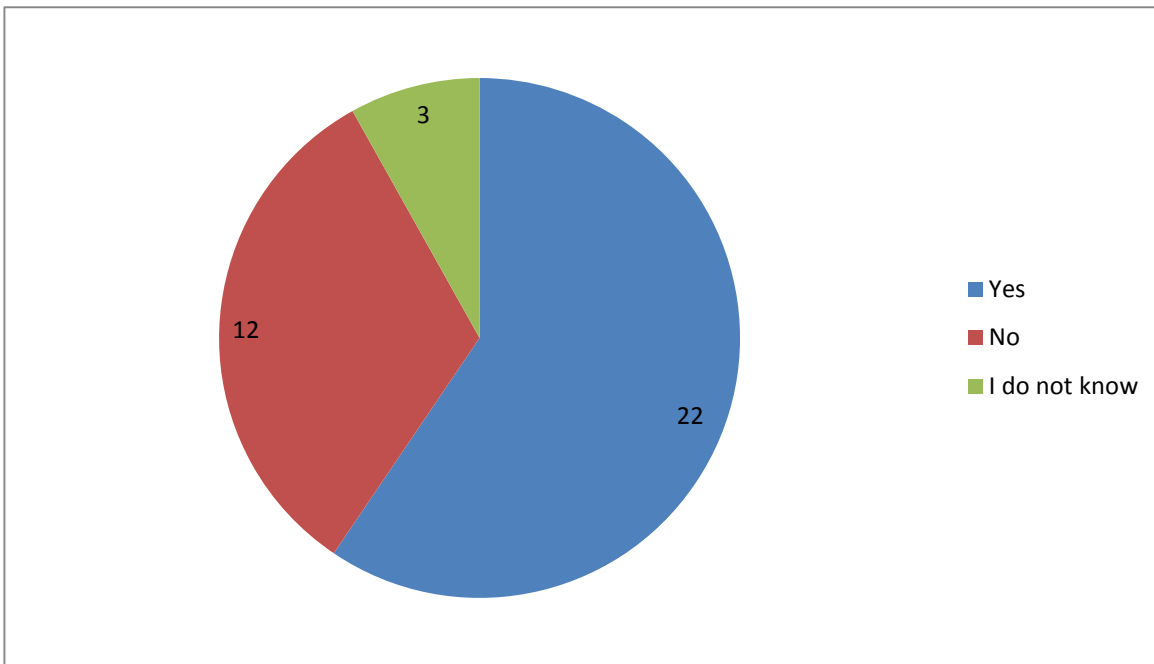
Total response: 37

The roughly half of the respondents who said that commercial agencies do play a role mostly thought that this was “to a lesser extent”, although about a quarter of those respondents said it was growing.

3.4 Consortia

An interesting phenomenon in international HEI marketing is the creation of consortia based on geographic region, type of institution, subject, or other criteria. There have been some notable successes with institutions working together to market themselves, and this also seems to bode well for any potential joint initiatives for EHEA countries or HEIs.

Table 9. Do HEIs in your country form consortia in order to market themselves, such as the “Hessen Universities” consortium in Germany, for example? (Survey Question #2.4)



Total responses: 37

Here again, it is interesting to note that while over half of the respondents already report that HEIs in their country do form consortia to market themselves, nearly half also say that this is happening “to a growing extent.” This may also be lower than in reality since many HEIs form consortia for other reasons, but international marketing may be a secondary—yet still important—role for the group. Two of the respondents said that this happens “to a greater extent”, while 10 reported it was “to a lesser extent”. Importantly, nine of the 22 respondents who answered in the affirmative about higher education consortia in their countries said that it was “to a growing extent”, which may indicate that it is on an upward swing.

4. Europe at Fairs and Conferences

4.1 European Higher Education Fairs (EHEFs)

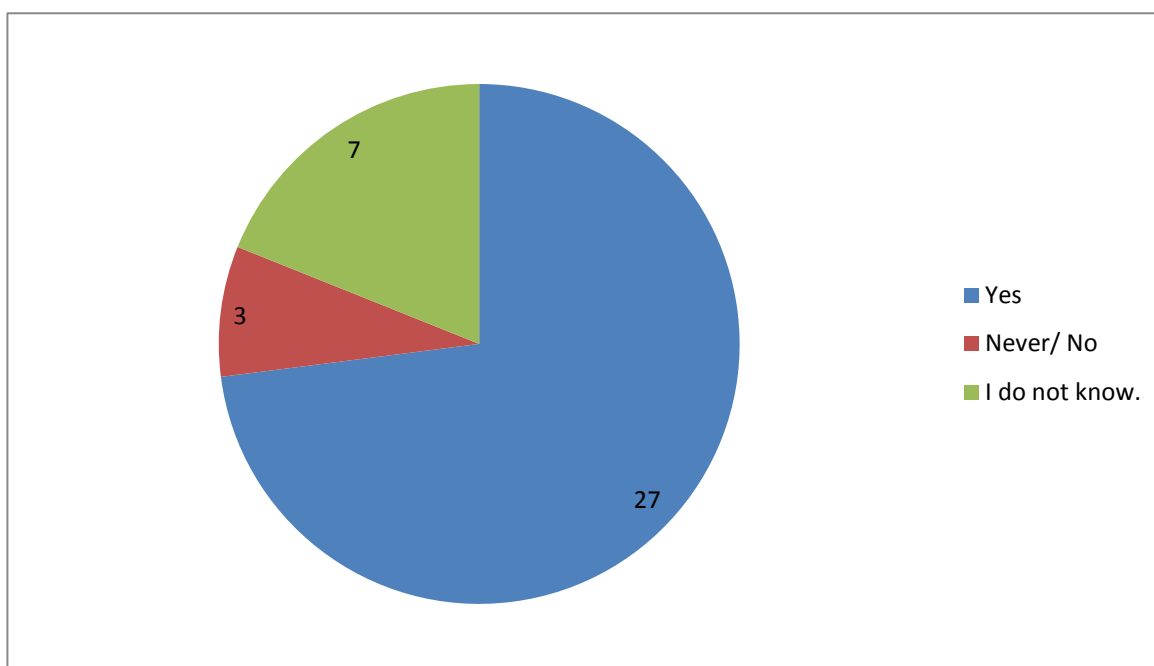
The European Higher Education Fairs (EHEFs) were a series of fairs and conference programs in seven Asian countries from 2005-2008 that had over 40,000 attendees and were funded by the European Commission as part of an overall Asia-European Union (EU) strategy. The goals of the EHEFs were to:

- “to increase the attractiveness of Europe as a study and research centre for excellence
- to strengthen Europe’s economic and cultural presence in Asia and vice-versa,
- to enhance mutual awareness
- to contribute to the further development of EU-Asian cooperation in the field of higher education”¹

Since the initial round of funding ran out, a group of national agencies has continued to promote “Study in Europe” through fairs in Asia, and elsewhere.

¹ From “EU Strategies for Promotion”, presentation by Louise Watts from CampusFrance.org at the Erasmus Mundus seminar Prague, 19th-20th June 2008 on the Promotion of Higher Education and Marketing Strategies. Accessed on 14 February 2011 at http://www.highereducationpromotion.eu/web/images/Seminar_presentations/eustrategiesforpromotion.pdf.

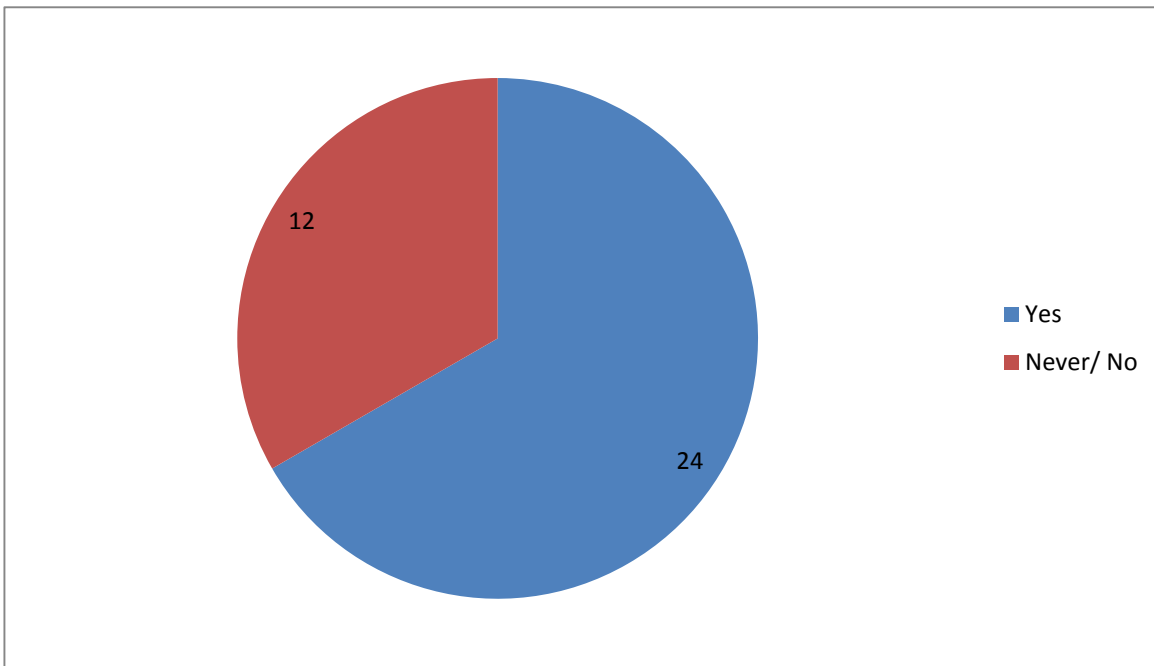
Table 11. Have HEIs in your country participated in European Higher Education Fairs (EHEFs) within the last five years? (Survey Question #3.1)



Total responses: 37

All the respondents who answered that they HEIs have taken part in EHEFs in the past five years said that they had participated more than once, which would indicate that they saw a clear benefit to this form of international marketing. It would be interesting to delve deeper into this question, seeing if there was an impact on the flows of international students from countries with EHEFs towards Europe, but the EHEFs already established a visible face for the EU countries under the banner of “Study in Europe”. It is not entirely beyond the realm of possibility that this could be extended to include EHEA countries that are not member states in the EU, although this may not be possible due to various funding requirements among other reasons.

Table 12. Have you as an individual or has a representative from your country participated in European Higher Education Fairs (EHEFs), as a speaker, panelist or organizer for example? (Survey Question #3.2)



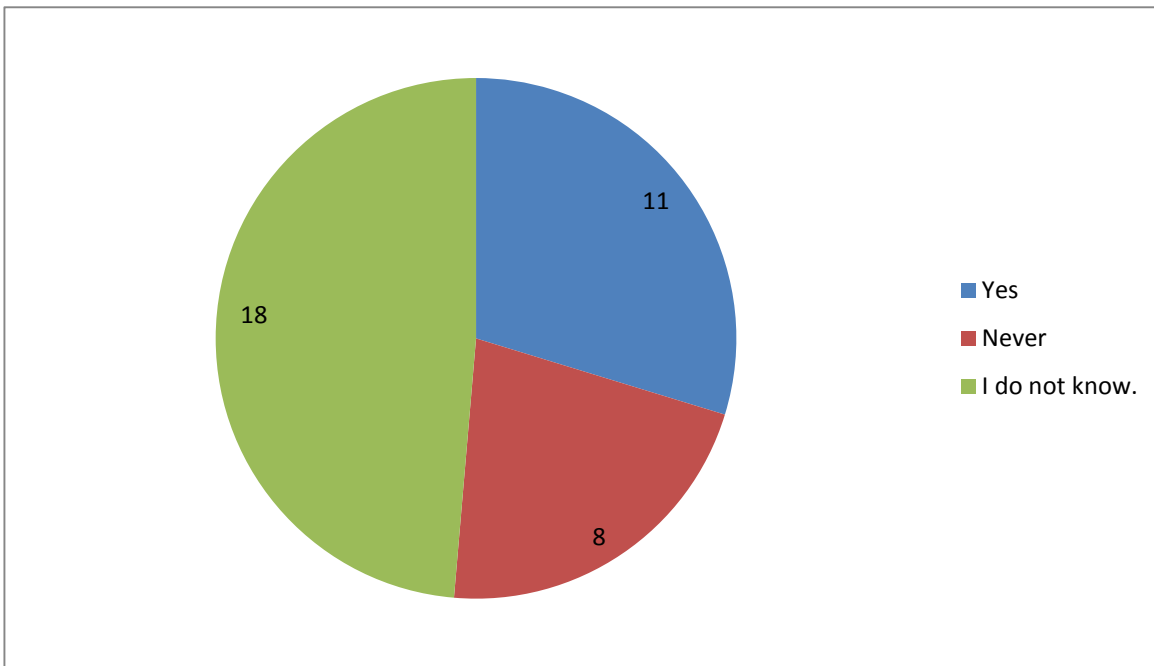
Total responses: 36

Of the 24 affirmative responses, 19 said this has happened “more than once” and four said only once. The responses included participation by representatives from national agencies, from ministries, from higher education institutions, and other related NGOs in EHEFs in various countries, as well as EAIE and even national fairs.

4.2 Fairs with European Universities and/or Organizations

In addition to the EHEFs, there have been other fairs that have focused on promoting study and/or research in Europe. Question #3.4 in the survey was an attempt to get a clearer sense of how widespread these types of fairs are and how many countries have HEIs that participate in them.

Table 14. Have HEIs from your country participated in fairs within a consortium of European universities or European organisations, at “Europosgrados” for example? (Survey Question #3.4)



Total responses: 37

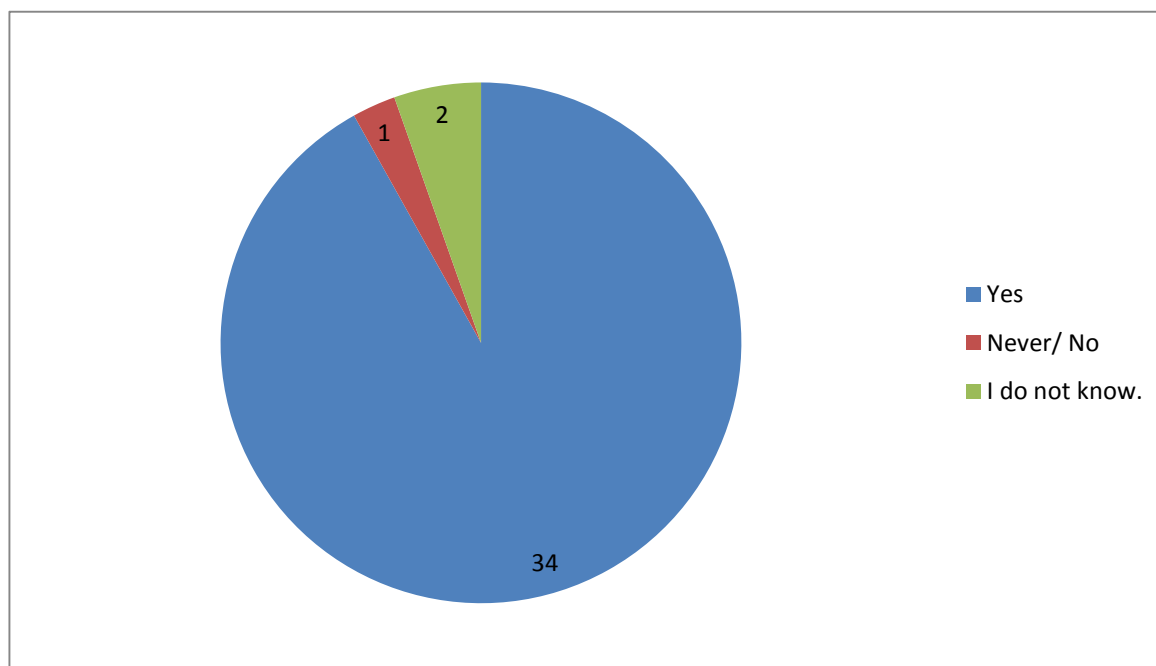
As can be seen in Table 14 above, a bit less than a third of respondents reported having participated in fairs with other European universities and/or organizations. The 11 respondents who indicated that HEIs in their country had participated in these types of fairs all said that they had participated “more than once” and mentioned both Europosgrados (for Dutch, French, German, and Spanish HEIs to promote “European Higher Education” in various Latin American countries) as well fairs related to the Erasmus Mundus program.

Interestingly, nearly every respondent said that they had participated in conferences or seminars that had the goal of providing information about European mobility or promoting the EHEA, Erasmus Mundus, etc. (see Table 15 below). Thirty-two out of the 34 respondents who answered in the affirmative said that they had participated more than once.

4.3 Conferences and Seminars that Promote the EHEA and Related Topics

There is, of course, a difference between HEIs participating in fairs where they can promote themselves internationally in a European context and those where they attempt to inform international audiences about specific initiatives or aspects of the EU or EHEA such as increased mobility or the Erasmus Mundus program.

Table 15. Have your HEIs participated in conferences or seminars that were set up to disseminate information on, for example, European mobility, or that were set up to promote the EHEA or ERASMUS MUNDUS and the like? (Survey Question #4.1)



Total responses: 37

It would be interesting to ask in a follow-up question whether the target audiences for these conferences or seminars were international participants or whether these were organized for primarily European participants. It is likely that most of these sorts of seminars and conferences were organized within the context of EU funding and promotion schemes, so it would depend on the type of program and funding whether or not they addressed a European or non-European audience.

5. Further Training

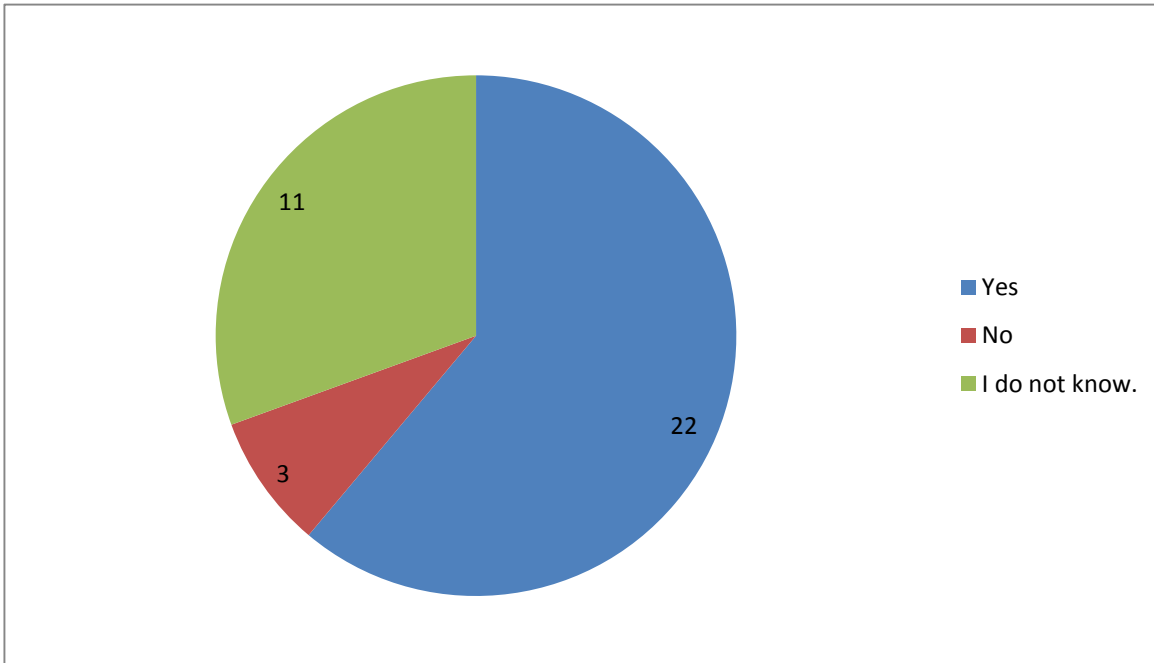
A short series of question delved into the importance of professional or continuing education courses in international higher education marketing. Although this survey only establishes a baseline across Europe—a snapshot of a moment in time rather than trends over time—it can be assumed that the demand for trained marketing professionals who can operate successfully within the higher education sector in Europe will only grow. At the same time, people in existing positions at universities in, for example, international offices, may need to gain new skills to cope with shifting demands, including an increased focus on marketing and student recruitment.

These questions were intended to assess the current provision of ongoing education offerings for professionals in international higher education marketing. For some respondents, this may include entire degree programs. For others, they may be thinking more in terms of short seminars for employees at universities. Ensuring that as many people as possible who are engaged in international higher marketing for EHEA universities (including employees at national agencies, commercial agencies, and, of course, HEIs themselves) has had appropriate training—and have access to ongoing training to keep skills current—could have a major impact on the degree of success of various national and institutional efforts at international recruitment.

5.1 Training in International Marketing

The results displayed in Table 16 (see below) indicate that the majority of countries report that HEIs offer “further training in international marketing”, although it is possible that some respondents may have been answering about “international marketing” in general and not “international higher education marketing”. That said, in the context of this particular survey, respondents were very likely to have assumed that this question was about higher education marketing.

Table 16. Do HEIs in your country offer further training in international marketing? (Survey Question #4.2)



Total responses: 36

Although a small majority of respondents to this question said that HEIs in their country do offer “further training in international marketing”, only three said that this is offered “to a great extent”. Nine indicated that it is “to a growing extent” and 10 “to a lesser extent.” The comments indicated some collaboration between HEIs and national agencies, as can be seen in the selected excerpts:

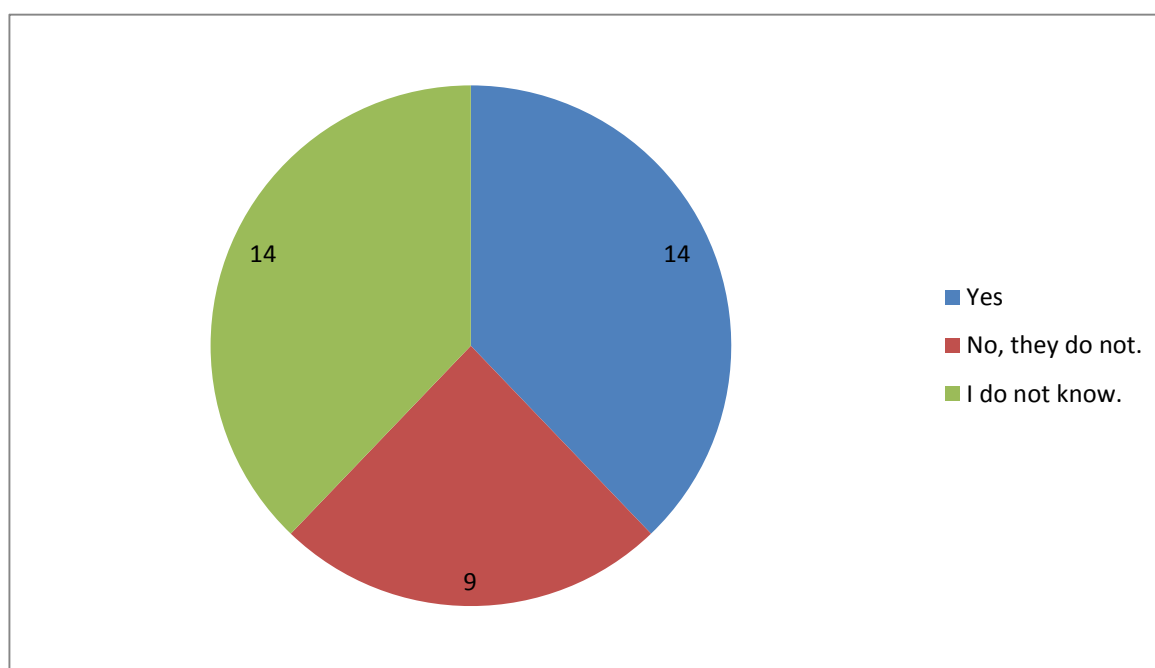
- Belgium (NL): “For their staff”
- Ireland: “Some of this is provided by the national promotion agency (see question above), in collaboration with HEIs. Others are provided in-house or are sourced by HEIs from commercial training bodies.”
- Moldova: “The University of the Academy of Sciences of Moldova does trainings within the Entrepreneurial University (consortium established within a Tempus Project), more than that, it will be soon installed an office in charge for entrepreneurship and marketing”
- Montenegro: “For the time being there are not such activities performed by HEIs themselves. Our department for higher education intensively works on including our HEIs in some mobility programmes which are dedicated not only to European countries but to African and Asian. It is understood that precondition for it is good marketing of institutions and their possibilities in sense of quality and good performance.”
- Norway: “Taking the question to mean further training within the scope of this questionnaire, I am certain that they are not....”

- Poland: “In fact it is peer-to-peer training, for example initiatives of IROs Forum (International Relations Offices Forum established in Poland).”
- Slovak Republic: “Erasmus Mundus Action 4 project with DAAD, EduFrance”

5.2 Training in Marketing Within a European Context

The next question asked if there was any further training in “marketing [HEIs] on a European level?”, and the results can be seen in Table 17 below. Although this was a fairly broad question, the comments indicate that most understood this as training in how to market national systems or individual HEIs within the broader context of the EHEA and/or Europe. Only 12 respondents answered to this question, one of the smallest participation rates in the survey.

Table 17. Do HEIs in your country offer further training in marketing themselves on a European level?
(Survey Question #4.3)



Total responses: 37

None of the respondents answered that HEIs do this in their country “to a great extent”, only six said “to a growing extent”, and six “to a lesser extent”.

The following comments were also received from respondents who answered in the affirmative to the question of whether this training is provided in their country:

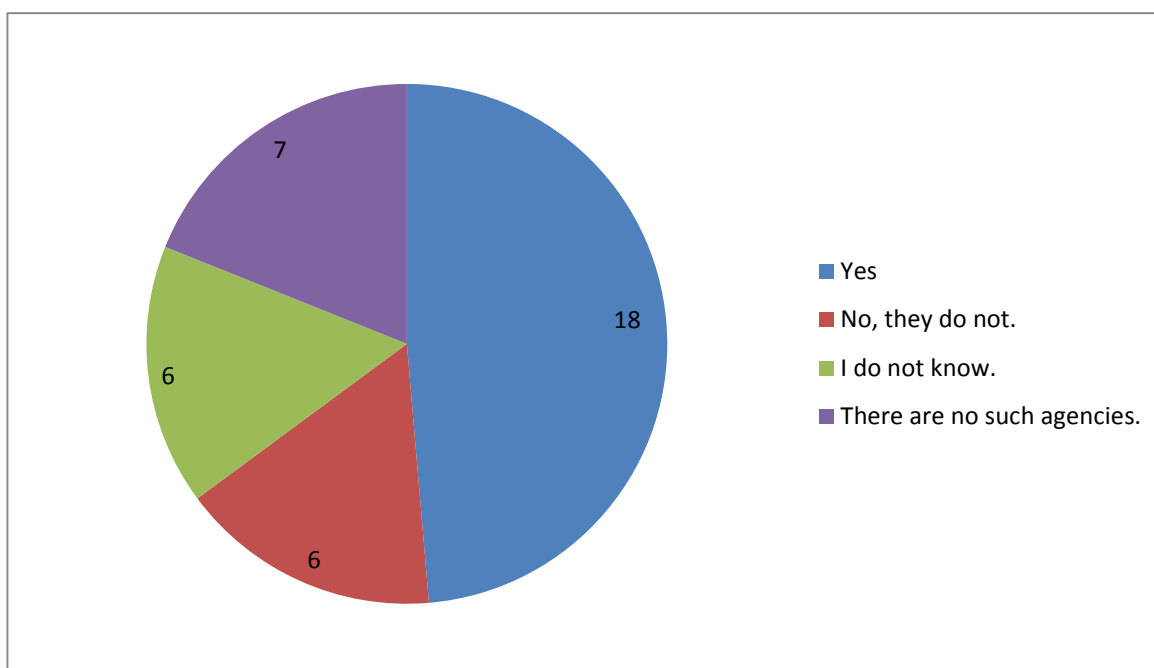
- Belgium (NL): “for their staff”
- Iceland: “At consortium meetings HEIs share experience and work together nationally. HEIs have also in cooperation with the Nordic countries participated in exhibitions in Europe and outside Europe.”
- Ireland: “European marketing is not dealt with in separate training to international marketing.”
- Montenegro: “As we mentioned above the best marketing is through European mobility programmes like CEEPUS, ERASMUS MUNDUS, MEDITERRANEAN OFFICE FOR YOUTH...”
- Norway: “Taking the question to mean further training within the scope of this questionnaire, I am certain that they are not. But of course there are institutions which offer courses in international marketing on a general level”

- Scotland: “Although being in Europe brings many benefits and is very important to us, we do not consider it to be the main reason that, for example, international students choose to study in Scotland. “
- United Kingdom: “Scottish HEIs have a European group, similar to NARG which co-ordinates joint recruitment activity in Europe”

5.3 Training by National or Commercial Agencies

For respondents who said that they do have national and/or commercial agencies in their countries, the majority said that they also offer or organize seminars on international HEI marketing (see Table 17 below).

Table 18. Do national or commercial agencies in your country organize / offer seminars on international marketing of HEIs? (Survey Question #4.4)



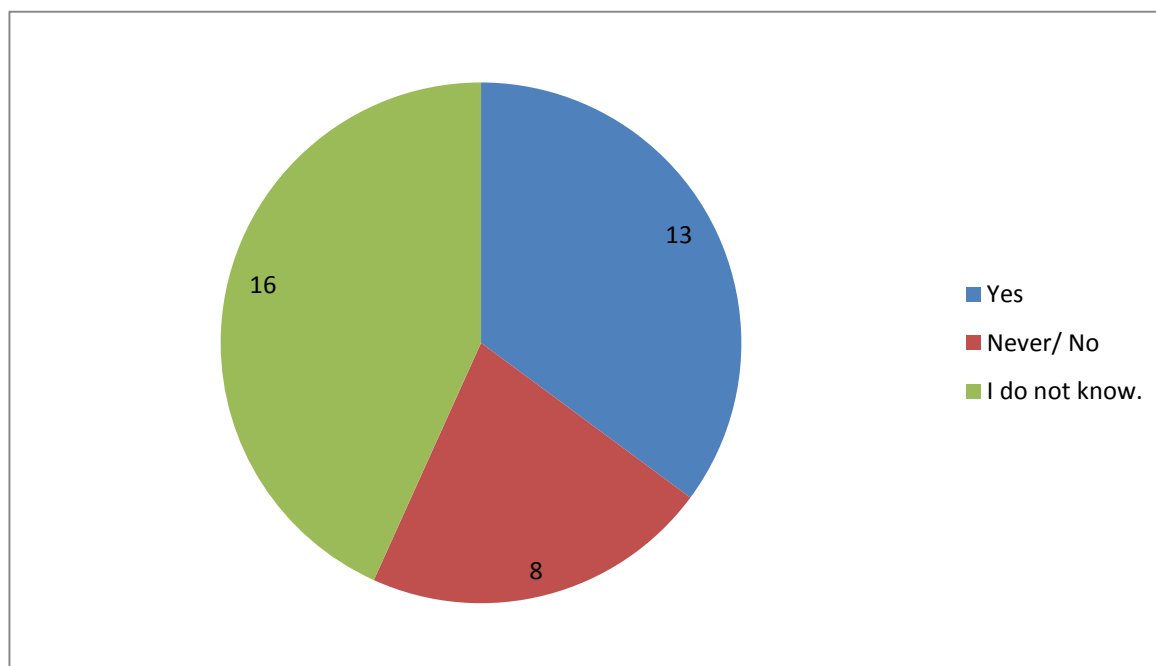
Total responses: 37

Of the countries where national or commercial agencies offer seminars on international marketing, two said this is “to a great extent”, eight said “to a growing extent”, and seven “to a lesser extent”.

5.4 Participation in Seminars and Workshops on EHEA Promotion

A follow up question was: “If yes, to which extent do HEIs in your country send representatives to seminars or workshops that were set up to teach marketing know-how or marketing strategies with specific relevance to promoting the EHEA?” (see Table 18 below). Only 13 respondents answered this question with one saying they send representatives to these kinds of seminars/workshops “often” and 12 saying “sometimes.”

Table 19. Do HEIs in your country send representatives to seminars or workshops (offered by iDA or GATE-Germany for example) that were set up to teach marketing know-how or marketing strategies with specific relevance to promoting the EHEA? (Survey Question 4.5)



Total responses: 37

The area for comments indicated that the participation in seminars or workshops is likely to improve marketing for the individual’s own HEI and not specifically to promoting the EHEA. Again, one of the respondents mentioned that the location within Europe is a part of their overall positioning, but there are not specific initiatives to promote the EHEA.

A question was included about the types of topics that are generally covered at “such conferences or seminars” (it should be noted that this is the first time that conferences were included in this section on training), mostly general topics are mentioned such as: “international branding”, “developing marketing strategies and tools”, “social media”, “target markets”, “identifying USPs”, “working with national agencies”, “web marketing”, “the use of agents”, etc. Many of these topics are not specific to higher education, so the conferences/seminars may be general marketing events. A few EHEA topics were mentioned such as the “international openness/dimension of EHEA” and “promoting the attractiveness and competitiveness of the EHEA”, although the responses sounded more as if they were potential topics than topics that had been covered frequently.

6. Marketing Tools and Messaging

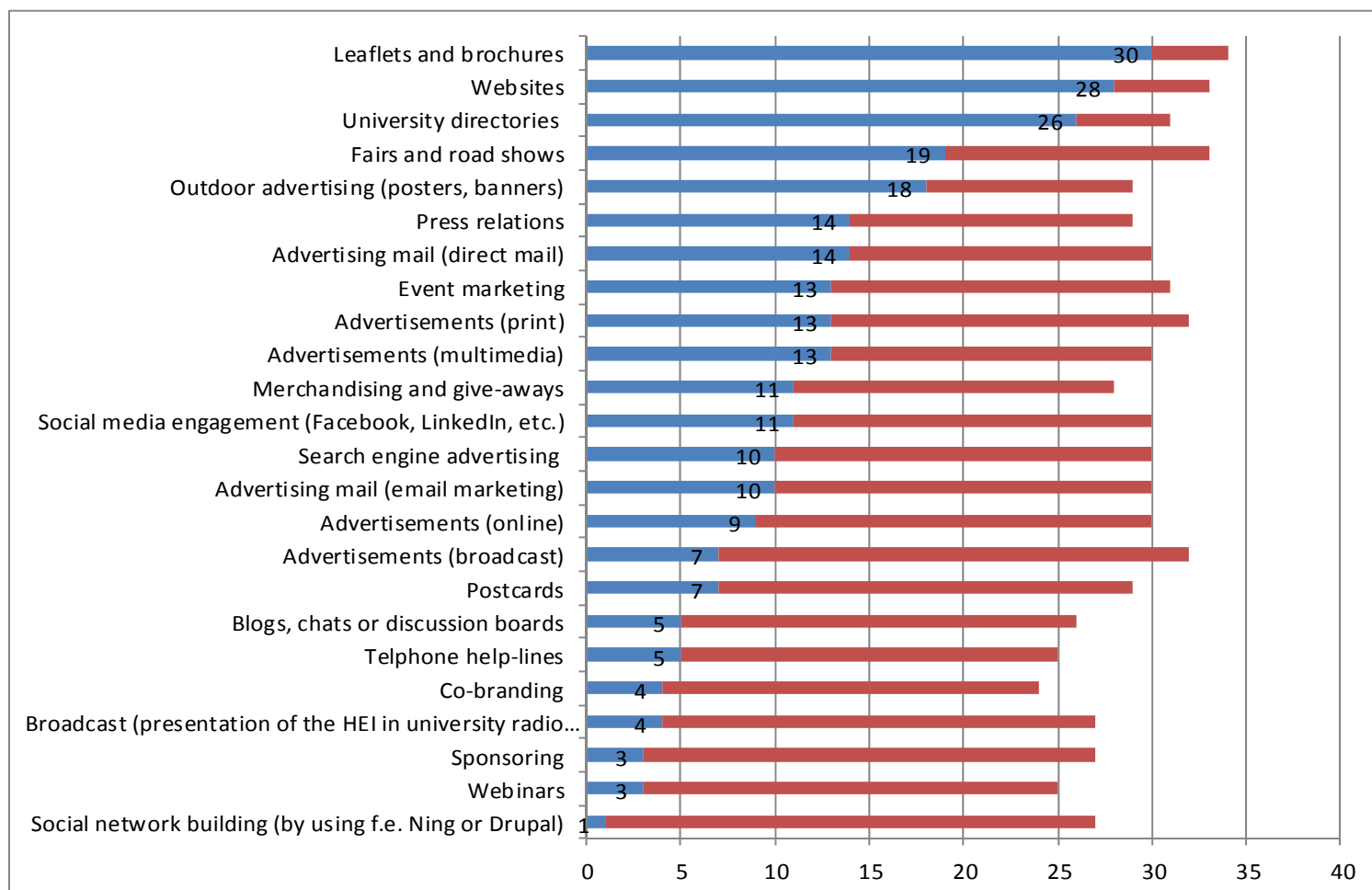
6.1 Tools

There are a wide variety of marketing tools available to individual institutions as well as national organizations that can reach international audiences. Table 19 shows which of these tools have been used “to promote the EHEA”, although it is likely that at least some of the respondents answered the question thinking of if their HEIs have used these tools in their own international marketing efforts.

The most popular tools were, by far, “leaflets and brochures”, “websites”, and “university directories” with 30, 28, and 26 (respectively) of the respondents saying that these tools were “very often used” or “often

used”. Fairs and road shows and outdoor advertising were also popular with over 15 respondents saying that they used them “very often” or “often”.

Table 20. Which of the following marketing tools have your HEIs employed to promote the EHEA? Please indicate, to which extent these marketing tools have been employed by your HEIs to promote the EHEA. The blue bar shows how many respondents answered “Very often used” or “Often used” for each category. The red bar represents the total number of respondents for each question. (Survey Question #5.1)



Responses to a question on, “additional marketing tools that have been employed in your institutional environment to promote the EHEA” (Survey Question #5.2) included:

- “Event-related websites”
- “Grants-database”
- “Bologna-Expert Network”
- “Contact agencies from abroad, contact education counselors”
- “Direct marketing, information sessions, FAM tours”
- “Personal contacts and testimon[ies]...”
- “Conferences, seminars”
- “Alumni association (slight relevance)”
- “Exchange of best practices”
- “Internet forums”

Some of the responses overlapped with the tools used above, but a small handful also responded, as in the general question on marketing tools, that the HEIs in their country do not promote the EHEA. One respondent said quite clearly, “The HEIs do not promote the EHEA. To the extent that they do international marketing they promote themselves.”

6.2 Messages

Some of the most interesting responses in the survey are arguably to be found in the answers to the open ended Survey Question #6: “When promoting the EHEA, what messages should be sent out?” The quality of HEIs across the EHEA comes up in many responses, as well as words such as “diversity” and “mobility”. There seems to be some interest in promoting something like “culture”, various aspects of the “European” way of life, and quality of life in general. Some aspect of low cost and value comes up in some of the responses as well.

Reading these responses shows a relatively high level of agreement about the messages that could be used to promote the EHEA as a whole, which would certainly make any joint marketing efforts much easier than if this was not the case.

The responses can be read here:

- Armenia: “Transparency, Integrity, Quality, Relevance”
- Austria: “Quality of HEI, Social Security”
- Belgium (FR): “The main message should focus on the diversity, the richness and the inclusive dimension of the EHEA.”
- Belgium (NL): “Collaboration among institutions in Education and Research, Quality of European Higher Education in many dimensions, Diversity, The governance of European Higher Education: strong involvement of stakeholders”
- Bosnia and Herzegovina: “Making labour market more compatible, Enhancing Mobility, Quality education, Development of human resources “
- Bulgaria: “Benefits of the EHEA to students and scholars mission and role of European HEIs, promoting attractiveness of European HEIs, providing appropriate services, quality, investment in human[s], diploma of prestige, opportunity of partnerships”
- Cyprus: “Quality in education, friendly, multicultural environment “
- Czech Republic: “International cooperation/environment, structured study system comparable to other EHEA countries (ECTS, Diploma Supplement)–opportunities for mobility, good quality education, great variety of education opportunities, cultural experience”
- Estonia: “Studying in any of the EHEA countries, one can travel/study/use the means of student mobility in the other countries of the area. Easy to travel, easy to transfer the credits- experience the whole of Europe!”
- France: “Top quality of higher education and researchers, Cultural tradition and current cultural environment, European dimension through joint degrees and programmes, low cost for studying (ie: what makes the difference in the EHEA as compared to the USA) and student support opportunities, increasing smooth and fair recognition procedures (it should be ...)”
- Georgia: “Free movement and mobility of academic staff and students, Increasing employability, Recognition of acquired qualifications, European integration of Georgia”
- Germany: “Europe stands for: cultural richness, excellent learning and research opportunities, high-quality education and interesting study opportunities at BA-, MA- and doctoral level, attractive

European funding schemes for attracting students, graduates and staff for studying, teaching or research in the EU.”

- Holy See: “European values and Culture”
- Hungary: “The high prestige of a European education / degree, The diversity of languages of courses offered, The quality of the courses is assured by strict quality assurance measures (accreditation).”
- Iceland: “Quality of education, costs, entrance requirements, language requirements”
- Ireland: “High levels of choice available to students within each country and across Europe, Europe as a place to travel and work, Europe as a key world market for future contacts, Richness of cultural diversity”
- Latvia: “Quality, [Attractiveness], Safety”
- Luxembourg: “Quality of education, cost of education, diversity of education”
- Malta: “The high quality of education, Mobility and transparency of qualifications, The high reputation of Higher education institutions, The European location”
- Moldova: “The compatibility of educational systems, educational programmes and learning outcomes. Assuring all the necessary conditions for students’ mobility. Opportunities offered in future.”
- Montenegro: “EHEA ensures more comparable, compatible and coherent systems of higher education in Europe. It is extraordinary tool to strengthen the competitiveness and attractiveness of the European higher education and to foster student mobility and employability through the introduction of a system based on undergraduate and postgraduate studies with easily readable programmes and degrees.”
- Netherlands: “There is a great variety of very good quality HEI’s. Make an informed choice”
- Poland: “Excellence of teaching and research. Popularity of joint study programmes. Opportunities for intra-European mobility. Richness of cultural heritage. Diversity of cultures. Good student services.”
- Romania: “Educational offer, tuition fees, borderless education, cooperation with third countries”
- Scotland: “Is it possible to have consistent messages?, Studies in English is a key selling point but is still not widely available across all EU countries, Breadth and diversity of academic programmes, Opportunities for mobility within Europe, Recognition of qualifications across Europe”
- Slovak Republic: “New EU countries should be more involved and supported”
- Slovenia: “EHEA is known for some of the world’s best HEIs like Oxford or Cambridge; less known, however, is the fact that Europe, unlike its competitors, has high quality higher education on the average, diversity is an advantage not disadvantage”
- Sweden: “EHEA promotion should be much better coordinated with promotion done by national agencies. Only then will it be meaningful to discuss messages.”
- United Kingdom: “The message should be the one discussed and supported by the IPN WG and the network”

7. The Impact of the European Union

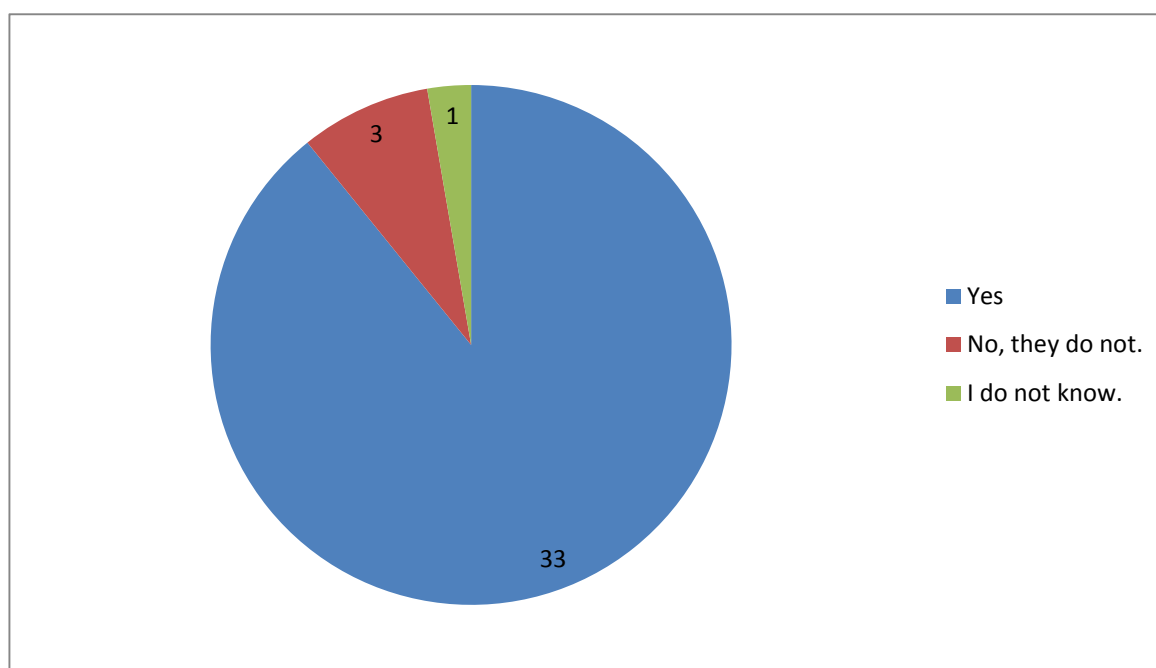
There is a question of how one defines “Europe” in any marketing initiatives, not least in part because many of the existing pan-European marketing efforts have been within the scope of EU-funded projects. There are currently only 27 EU member states, which means that 20 countries are part of the EHEA and not the EU. Some EU programs are open to third-country institutions, so this does not mean that HEIs in those countries will not have anything to do with programs such as Erasmus Mundus, for example. At the same time, though, even quite practical questions as to who would fund and man a “Study in Europe” booth may become sensitive issues.

There are surely mutual benefits that the EHEA and the EU lend to each other, and prospective students are likely to be unaware (and probably uninterested) in distinctions made between the two—at least when it comes to choosing a study program in one European country. The factors that make Europe an attractive destination for international students come, in part, from the results of the Bologna Process—but also from the various funding efforts at the EU level for study and research, as well as the ability to move easily across borders, use a single currency, and access a large market for future employment. Coordination between any future EU and EHEA marketing efforts in higher education (if these are to come into existence) would be prudent, as there is a great opportunity to maximize resources and impact by working across European institutions at every level. The same is also true for national agencies and HEIs own efforts, of course.

7.1 Participation in European Union Projects

Although only 24 of the survey respondents are members of the EU (the United Kingdom and Scotland answered the survey separately), 33 respondents said that HEIs in their country take part in various EU programs such as Erasmus Mundus (see Table 21 below), indicating a broad participation across the EHEA in these types of programs.

Table 21. Do HEIs in your country have EU-funded co-operation or promotion projects such as Erasmus Mundus, EU Japan or Atlantis? (Survey Question #7)



Total responses: 37

For the respondents who answered in the affirmative, seven said that this was “to a great extent”, 18 answered “to a growing extent” and eight answered “to a lesser extent”. The comments for this question indicated that some respondents may not have been certain if this referred to any HEI participating in these programs or at a national level—or if other funding from the EU, such as research funds, would be counted in this category. Considering that only

- Andorra: “University of Andorra and Government of Andorra have co-operation with some Higher Education Institutions in Spain, France, Belgium and UK, but they are not EU funded.”
- Belgium (FR): “No HEI from the French Community of Wallonia-Brussels has participated so far in a project funded through EU Japan, EU Atlantis or Erasmus Mundus Action 3. However, the Erasmus

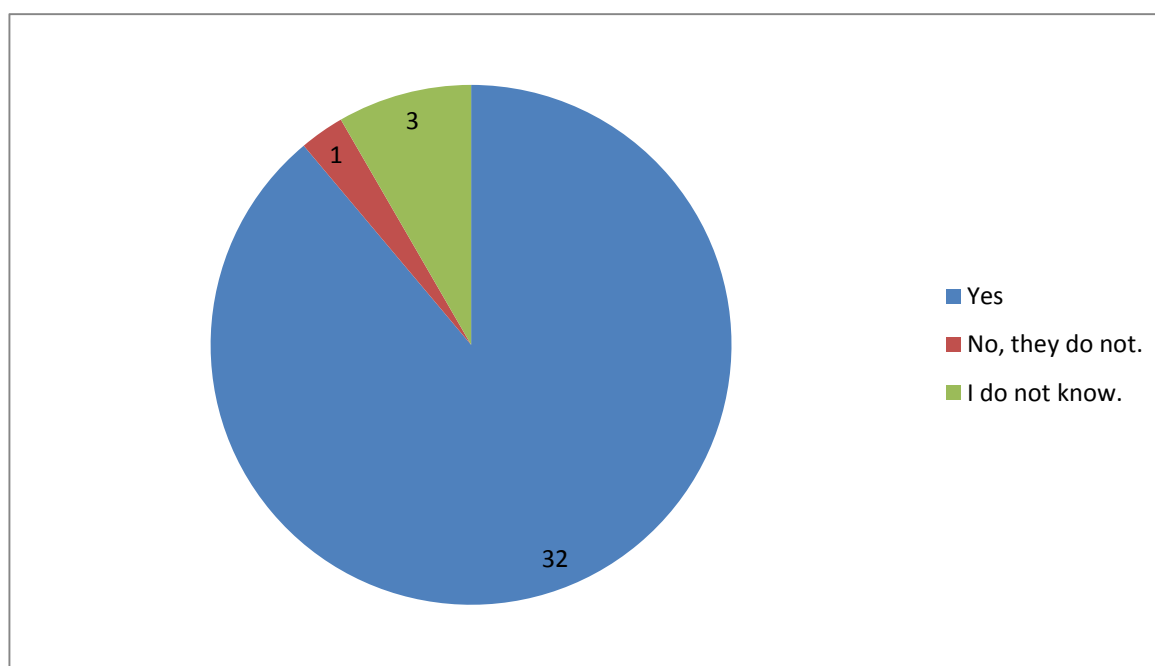
Mundus national structure has made more and more efforts to inform the HEIs about the opportunities offered in those frameworks. That’s why the HEIs of the French Community have been and are still participating in the Erasmus Mundus programmes action 1 and 2.”

- France: “CampusFrance was selected in an Erasmus Mundus EU-funded project, together with DAAD and Nuffic”
- Holy See: “Only in EU-countries where they are also part of national HE system”
- Iceland: “Erasmus Mundus promotion projects as stated earlier”
- Latvia: “HEIs are participating in ERASMUS MUNDUS tenders, but with very low success rate”
- Malta: “The University of Malta is a partner in 2 Erasmus Mundus Consortia and it also participates in the Vulcanus Programme – mobility to Japan.”
- Moldova: “Moldovan students can apply to the scholarship offered by the Erasmus Mundus Project, UNESCO, JAPAN Gov scholarship and that of the Hellenic Republic and Czech Republic.”
- Netherlands: “The biggest EU funds are research funds which are in particular used by several of the research universities; other funds are Erasmus Mundus, next to Erasmus”
- Norway: “Norwegian institutions have been fairly active in Erasmus Mundus, and also in a Nordic initiative, called Nordic Masters, which as much the same overall goal as Mundus”
- United Kingdom: “I do not think so at a national level but one would need to carefully go through the over 150 HEIs in the UK in order to have a reliable answer. However, there are number of UK institutions which are involved in Erasmus Mundus, and a few in Atlantis, or similar.”

7.2 Staff for EU Applications

In keeping with the large level of participation in EU programs across the EHEA, fully 32 respondents said that they, “employ staff especially designated to support EU funding applications.” The comments indicate that these staff could support faculty in writing grants for research funding, in addition to helping manage the various EU programs in international education such as Erasmus and Erasmus Mundus.

Table 22. Do HEIs in your country employ staff especially designated to support EU funding applications?
(Survey Question #8)



Total responses: 36

Of the respondents who answered this question in the affirmative, three said it was “to a great extent”, 20 “to a growing extent” and eight “to a lesser extent.” As mentioned above, the small handful of comments (see below) indicate that the respondents answered this question with a relatively wide range of functions in mind:

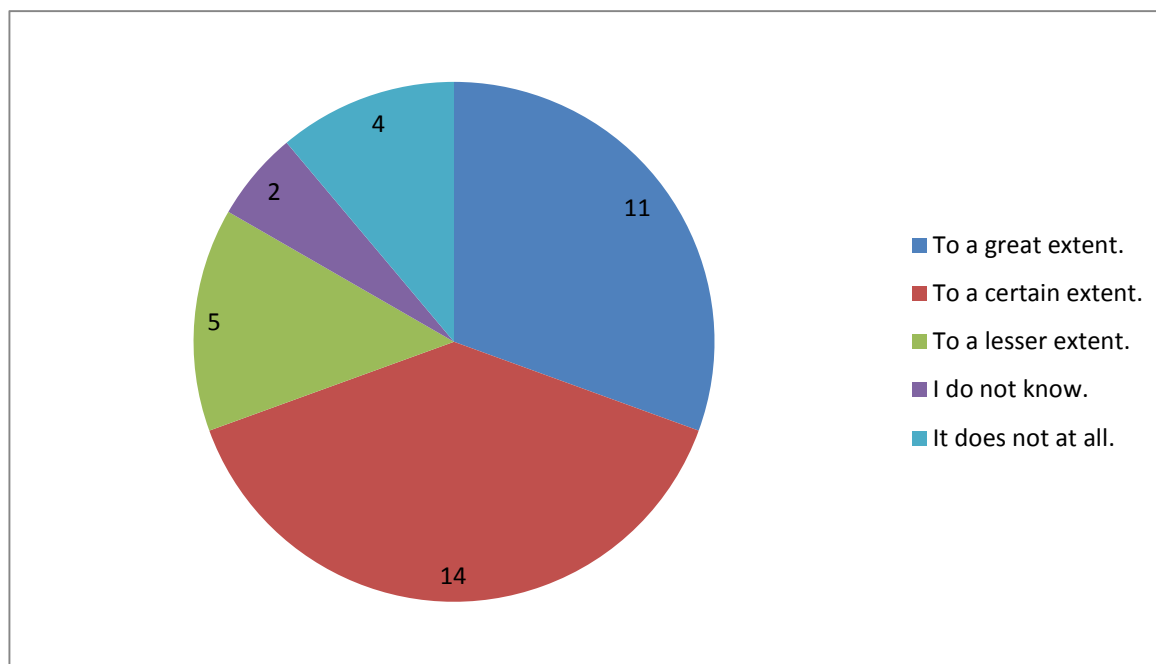
- Belgium (FR): “It concerns mainly the Erasmus programme as well as the Erasmus Mundus programme. However, so far, we haven’t been aware of HEIs employing staff to search and apply specifically for EU funded projects.”
- Hungary: “International offices and grant offices are now operating at almost all the HEIs – they have originally been established for the management of the Erasmus programme, but have by now become centres for most mobility activities and in a lot of places important centres for internationalisation.”
- Ireland: “These are particularly to seek EU research funding, including mobility for 3rd country young researchers. There is a lower level of expertise in applying for DGEAC funding for student mobility purposes.”
- Malta: “The Project Support Team at the University of Malta provides technical, financial and legal support to University staff (academic and administrative) that are bidding for or participating in proposals for EU-funded projects.”
- United Kingdom: “It varies from institution to institution depending on the institutional plans and priorities”

7.3 EU Funding

The question of how EU funding might play a role in marketing the EHEA (Survey Question #10) is an interesting one. Of course it makes Europe as a whole a more attractive destination to be able to offer various scholarship and funding programs for international students and scholars. Outreach efforts built into programs such as Erasmus Mundus or the EHEFs also help spread the word about the high quality, diversity, and attractiveness of European higher education. At the same time, because they do not have overlapping memberships, it is unlikely that there will ever be any explicit marketing for the EHEA as part of EU outreach efforts—then again, this is probably not necessary either if the primary goal is simply to get international students to start thinking about Europe as a place to study.

Twenty-five of the 36 respondents to Question 10 answered that EU funding did play a role in the marketing of EHEA either “to a great extent” or “to a certain extent” (see Table 22 below). Another 13 respondents said that this is only “to a lesser extent”, four respondents answering “not at all”, and the remainder saying that they “do not know”. This would indicate that there is some recognition of a possible interplay between the EU and the EHEA that is already being reflected in international marketing efforts. It would be interesting, of course, to see how this appears to international students, if it has an impact on the entire EHEA region (or just the EU member states), and if any of this is changing what international students think of when they think of “Europe”—for the better or the worse.

Table 22. To which extent to which extent does EU funding play a role in marketing EHEA?
(Survey Question #10)



Total responses: 36

8. Conclusions and Further Questions

The goal of this survey was to establish a baseline for what EHEA countries are doing to market their HEIs, what the HEIs themselves are doing, and who is involved. The very way the respondents answered the questions showed important differences in how the same word or concept can be understood, which is somewhat unsurprising given the diversity of the countries represented—as well as the diversity of the likely respondents. At the same time, some trends did begin to emerge and it is clear that international higher education marketing is an important topic across much of the EHEA, and one that will likely grow in importance. In addition to looking at the current state of international higher education marketing in the Bologna Area, this section will explore some of the ways that the EHEA countries could work together to achieve greater results for their individual systems and institutions.

8.1 Findings

Some of the key findings from this initial survey include the following:

- International marketing is widespread across the EHEA, but takes different forms, has different focuses, and varying degrees of intensity from country to country
- Most HEIs or countries focus on a handful of key geographic target markets for their international marketing efforts
- At the national level, many EHEA countries do have national agencies focused on higher education marketing as well as departments in one or more federal ministries
- A broad range of marketing tools are used by HEIs, and the most popular are familiar tools such as leaflets/brochures, fairs, and websites
- There is a large degree of participation in pan-European marketing and promotional efforts such as the EHEFs or activities as part of EU-funded programs such as Erasmus Mundus

- There seems to be broad agreement on key messages about the EHEA such as quality of higher education institutions, diversity, and quality of life/culture
- There is less agreement about the benefit of EHEA-wide marketing efforts versus national or institutional undertakings
- There is not yet a common language about marketing within the EHEA, and terms can have very different meanings when taken in different national contexts

8.2 Role of EHEA in Providing Information

Before delving into the ideas for joint activities, there was one question that comes close to explicitly addressing what kind of a role any EHEA-level marketing initiative might have. Survey Question #11 asked: “Which information gaps would you want to have filled by EHEA sourced information? Please specify.” The answers here (shown below) reveal far more diversity than the question on what messages could be used to promote the EHEA. The responses seem to reveal a natural tension between national/institutional and European-wide initiatives, reflect national issues and priorities, show the overlapping meanings of “Europe”, and raise questions about what any joint EHEA information materials might look like.

The question asked specifically about “information gaps”, so the respondents were tasked with considering what international audiences already might or might not know about the EHEA, its member states, and the diverse higher education institutions. While several respondents mention what sounds like databases that list specific degree programmes, the respondent from The Netherlands brought up the valid point that it can be hard to maintain this kind of information at a central level—and it may be a better option to link to the various national portals. In terms of more general information, it seems as if the needs would roughly mirror what many national agencies produce for their country’s higher education systems, covering everything from funding opportunities for EHEA countries to quality of life as a student in Europe. Again, it would be critical for any EHEA materials to offer an added benefit to what exists already for national systems and, when relevant, for the EU; much of what can be gained may, in fact, lie in aggregating this information in a user-friendly way.

The detailed responses are below:

- Belgium (FR): “From the perspective of the Ministry of the French Community, there is still a need to discuss the meaning of the “European” HEA at a ministerial level. Through the successive ministerial meetings and the work achieved by the BFUG, we have identified implicitly some characteristics of the EHEA (diversity, transparency, socially-inclusive, high quality, etc.) but those have never been discussed and then defined explicitly. However, we think it is an essential condition if we are willing to promote the EHEA.”
- Belgium (NL): “A comprehensive leaflet on European Higher Education System, One single comprehensive leaflet on Bologna achievements, Quality assurance in Europe, Research strengths in Europe, Erasmus Mundus, The collaboration among European Higher Education Institutions, a European ranking”
- Bulgaria: “Measures for improving the social condition for students, academic staff and HEIs, joint and double degree programmes”
- Czech Republic: “The information should be easily accessible and complex (in several languages if possible).”
- France: “Quality of education based on different and specific criteria : what are the strengths and weaknesses of each HEIs, in each subject-area, A data-base of student support available in the EHEA”

- Germany: “What is the added value when studying or doing research in Europe (irrespective of the opportunities in a given country)?, What are specific European study opportunities? (e.g. double or joint degree programmes with various European countries, European study programmes), What kind of funding schemes are available for study or research in Europe?, What are the legal framework conditions (e.g. visa, insurance) for study and research in Europe?”
- Holy See: “Importance of non-profit private HEIs in EU”
- Ireland: “Generic information regarding student opportunities in EHEA – travel, mobility (as student and graduate), open labour market, mutual recognition of qualifications, etc.... The EURAXESS researcher mobility portal and network could provide a possible model.”
- Luxembourg: “website”
- Malta: “More information about the EHEA”
- Moldova: “organization of information trainings and seminars for the HEIs, theoretic support in marketing strategies, sharing the best experience and practices”
- Montenegro: “Information of all study programmes offered in Montenegro, Conditions of studying, Exchange programmes”
- Netherlands: “None, the information will be out of date before it is published. Links to national information sets, for NL to the Nuffic and/or to the national information website studiekeuze123.nl or studychoice123.nl”
- Poland: “Recognition of diplomas in Europe, Joint study programmes in Europe.”
- Romania: “Information on HEIs from countries outside the EU, Ranking of HEIs”
- Scotland: “Recognition of qualifications – don’t think the referencing is always understood. We sometimes get asked if some of our qualifications are recognised via Bologna – this is not a good sign given that Scotland is one of the countries furthest ahead in implementing the Bologna reforms.”
- Slovak Republic: “Promotion project for the Slovak HEIs (e.g. funded by ESF), Support for the participation of Slovak HEIs in the fairs (e.g. EM)”
- United Kingdom: “As mentioned at the May IPN meeting, it would be helpful to have more up-to-date system information of all Bologna participating countries.”

In terms of concrete ideas for ways to provide better information about the EHEA and the constituent states, the following could be considered:

- **Create a student-facing EHEA website.** The existing website is very much focused on policy and is not intended for prospective students. At the same time, a Google search for “study in Europe” (a relatively likely search term for students who want to study in Europe, but have not yet decided on a particular country), links first to a website from the European Commission that contains primarily links to national websites. The links from there to the EHEA (http://ec.europa.eu/education/lifelong-learning-policy/doc62_en.htm) go to very dense and policy-oriented pages on the Commission’s website. Other top links in Google are for private companies and are of varying quality. Creating even a small yet compelling website for the EHEA itself could focus on some of the key messages discussed in this paper, and serve as an introduction to national information sources, which can be overwhelming for international visitors.
- **Provide information packages about the EHEA that are targeted towards students and can be used by the press and online student portals.** Many media outlets and websites would be grateful to receive some text and key facts about the EHEA that they could use. This would, of course, allow the EHEA to better steer the messages being put out about the Bologna area. Offering attractive images of EHEA university life for use in print or online media would also be a way to visually represent

- some of the key messages such as quality of education (showing high-tech labs, interactive classrooms, etc.), diversity (different styles of architecture, international students, etc.), culture, etc.
- **Distribute information about how to market HEIs within the context of the EHEA to higher education marketing professionals within the EHEA.** Providing individuals working at HEIs and national agencies with a brochure or information package that clearly enunciates the additional benefits that a prospective student can enjoy by studying in the EHEA may help them, if desired, add or improve any marketing messages they have that speak to the European context. This could include information about funding schemes for students or researchers, data about how international students perceive Europe, general marketing tips, as well as access to the text and images mentioned above.

8.3 Market Research

Prior to creating any new information materials, it would certainly be worthwhile to conduct some degree of market research in a handful of key target markets to get a better sense of what information prospective students do, in fact, need to learn about opportunities across the EHEA, as well as what arguments might help convince them to consider studying in one of the EHEA member states. At the very least, the IPN group might consider providing the individual countries with one or two questions that they could add on to any existing national market research projects. If there are meaningful messages about the EHEA or the “European context” that could be used effectively in national and institutional marketing materials or campaigns, it would be in everyone’s interest to get a sense of what these are.

8.4 Building Ties Across Borders and Organizations

One of the most useful functions an EHEA-level marketing effort could fulfill would be to increase cooperation between European-wide organizations, national organizations, and their international counterparts. Within Europe, closer cooperation could lead to the creation of important and mutually-beneficial efficiencies between countries and institutions. Europe will likely never speak with one voice, and, in the case of higher education where a student can only choose one HEI at a time, this would not even make sense. With closer coordination, however, the likelihood that there would be redundant marketing efforts and mixed or contradictory messages between, in particular, the EU and the EHEA in the area of higher education marketing would be significantly reduced.

While higher education professionals have, as mentioned, been following the Bologna Process with keen interest, ongoing communications about new developments in the EHEA are critical to keeping the view of Europe fresh and current. In this age of social media and networks, word of mouth may even be gaining in importance—and having important “influencers” such as professors, study abroad advisors, or colleagues presenting prospective students with an outdated image of European higher education can be extremely detrimental to any marketing efforts.

Some ideas to help build these ties between organizations and individuals include the following:

- **Host conferences and seminars tackling big issues faced by societies and HEIs around the world.** Europe has a long and rich history of discourse and dialogue, and there are important topics surrounding the role of higher education today where the EHEA could take a leadership role in initiating productive discussions both within the EHEA and with international partners. This would also serve as a forum to present some of the forward-thinking initiatives taking place within the EHEA. Some topics could include brain drain/circulation, the role of higher education in tackling some of the “grand challenges”, life-long learning, diversity, negative impacts of globalization, etc.

- **Help to build networks of EHEA marketing professionals from HEIs and national agencies.** Since higher education marketing is still relatively new as a profession anywhere in the world, individuals working in the field are unlikely to have had any formal training and may work alone or in very small teams. Creating opportunities to bring these individuals together to build their skills and their professional networks, could lead to a more highly-qualified workforce “in the field.” The European Association of International Education Administrators (EAIE) is already doing a lot of work in this area, and could be a potential partner. The American Marketing Association, with its annual Higher Education Marketing Symposium, is another potential partner or model.
- **Actively participate in existing international education conferences,** creating workshops or session proposals on the EHEA for Nafsa, EAIE, Going Global, APAIE, etc. This would serve a two-fold purpose: to disseminate information among this critical audience of international education professionals while building ties to the organizations running the conferences themselves. A joint session with colleagues from the organization or the host region would help to create these ties.
- **Address EHEA marketing at forums that bring together many of the key decision makers in EHEA countries such as IPN, BFUG or ACA meetings.** This could include either governmental representatives or representatives from national agencies or related organizations. Keeping the topic on the agenda will help move it forward in terms of both defining the areas for collaboration as well as finding appropriate funding sources.

8.5 Accessing Existing Funding Programs

There is no existing budget for international EHEA marketing initiatives, so tapping into other funding sources, particular EU funding, may be a good way to begin to work together and begin to determine which types of activities are most effective.

The most immediate possibility would be applying for funding through Erasmus Mundus’ “Action 3: Promotion of European higher education”. The 2011 call for proposals has been published and the application deadline is 29 April 2011 for projects under Erasmus Mundus. The following priority activities have been identified²:

- Promotion of European higher education in certain geographical areas (please specify the geographical areas):
- Improving services for international students and doctoral candidates;
- International dimension of Quality Assurance;
- Strengthening relations between European higher education and research;
- Promoting European study opportunities for doctoral candidates;
- Promoting the Erasmus Mundus programme towards European students.

These funds could be used, for example, to fund new EHEFs that would focus on key geographic areas, although the call is broad enough that many other joint activities would also fit with the requirements. The “Programme Guide” states: “ 1.4.2 A THIRD-COUNTRY HEI Although third-country HEIs can participate as active members of the consortium/partnership/network in exactly the same actions as European HEIs, they

² 2011 Call for Proposals: EACEA/41/10, p. 11, http://eacea.ec.europa.eu/erasmus_mundus/funding/2011/call_eacea_41_10_en.php, accessed 15 February 2011.

cannot submit a grant proposal on behalf of the entire consortium/partnership/network. Such applications have to be presented by European organisations.”³

In this case, the “European” countries eligible for Action Line 3 include the 27 EU Member States, Iceland, Liechtenstein, and Norway. The other EHEA countries would be considered “third-countries”; they could not submit the application, but would be eligible to participate.

Other potential sources of funding for EHEA marketing efforts include:

- National agencies and governments (as long as a national interest is clearly being met)
- Foundations, NGOs, etc.
- HEIs (in the form of participation fees for conferences/seminars, etc.)
- Other EU program lines

8.6 Further Questions

As has been mentioned, this survey was intended to be a first step. Having now established a more clear sense of the current picture within the EHEA, it is also clear that there are many rich areas to explore further. Some topics which could be addressed in future surveys, market research projects, or meetings include:

- Who does marketing at HEIs in the EHEA?
 - What are their titles?
 - What kinds of functions do they fulfill?
 - How were they trained? Do they undertake ongoing training?
 - Are they mobile within their own country? Within the EHEA?
- What are the motivating factors behind international marketing in the various EHEA countries? Why is it more or less important to their HEIs?
- What kinds of budgets are there for marketing by national agencies and by HEIs themselves?
- What are the most effective strategies used across the EHEA to recruit international students?
- How do national and institutional marketing efforts already impact the flow of students between European countries? How does it already impact the flow of students from abroad to the EHEA?
- What do HEIs do to help ensure that international students succeed in their academic programs and to minimize the drop-out rates?
- Are there differences between the intensity of international marketing between various types of HEIs (public/private, large/small, research/applied, etc.)?
- What is the proper role of tourism or tourism-style messages, if any, in HEI marketing in the EHEA?
- What could be the key “EHEA” marketing messages for...:
 - ...study abroad students?
 - ...prospective bachelor’s students?
 - ...prospective master’s students?
 - ...prospective doctoral candidates?
- What could be the key “EHEA” marketing messages for...:
 - ...students in the natural sciences?
 - ...students in engineering?

³ “Erasmus Mundus 2008-2013: Programme Guide”, Version 16/12/2010, http://eacea.ec.europa.eu/erasmus_mundus/programme/documents/2011/em_programmeguide_1612_en.pdf, accessed 16 February 2011.

- ...students in the humanities?
- ...students in the social sciences?
- ...students in the arts?
- ...students in business?
- Are their negative perceptions that Europe and the EHEA may have to overcome? If so, what are they?
- What are the different driving factors for students choosing to study in Europe from different key markets?
- What are the relative benefits to marketing the “EHEA” versus “Europe”?
- How can we explain the EHEA in an easy-to-understand and attractive way to international students?
- Is “EHEA” the best “brand” for the European Higher Education Area? If not, what are other options?
- What are the best potential sources of funding for joint marketing efforts?
- What are global trends that might impact the ability of EHEA universities to recruit international students (e.g., growth of higher education institutions in China and India, demographic changes outside of Europe, etc.)?

There are certainly other areas where a better understanding would benefit both national and institutional marketing efforts as well as any joint EHEA undertakings, but this list already reveals how rich this area is for future exploration and inquiry.

8.7 Authors’ Note

The authors would like to thank the participating agencies and individuals who answered the survey, and who helped design the survey and process the data. While we have made every effort to represent responses accurately, all mistakes or misrepresentations are our own.

Irene Jansen, Head of Communications and Marketing Division, German Academic Exchange Service

Megan Brenn-White, Independent expert on international higher education and higher education marketing

Appendix

Full text of Survey:

Survey of IPN Working Group 1 (DAAD, GATE-Germany)

Overview of existing European Higher Education Area (EHEA) Marketing activities, i.e. activities that are aimed at attracting international students, within the broader context of promoting the EHEA.

(With some questions examples are given to clarify the essence of the question and to stimulate thought. The examples are by no means meant to limit the scope of a possible answer!)

In this survey a distinction is made between the term “promotion” in the sense of an overall effort to inform about the EHEA and the Bologna Process and promote it in various ways, the term “information” in the sense of data collection and publishing in a neutral way, and the term “marketing” in the sense of initiatives and tools that lend themselves to attracting students.

1. MARKETING OF HIGHER EDUCATION INSTITUTIONS (HEI) INTERNATIONALLY / REGIONALLY

1.1 Do HEIs in your country actively market themselves **internationally**?

- All HEIs in my country do.
- Most HEIs in my country do.
- Some HEIs in my country do.
- I am not sure.
- They do not market themselves internationally.

(In that case move on to question 2!)

1.2 Do HEIs in your country focus on **particular regions or countries** when promoting themselves internationally?

- Most HEIs in my country promote themselves focusing on particular regions or countries.
- Some HEIs in my country promote themselves focusing on particular regions or countries.

If they do, on which **regions or countries** do they focus?

The regions / countries are:

...

...

...

- They do not focus on any particular region or country.
- I do not know.

1.3 Are there **special marketing measures or tools** that could be recommended for these regions / countries?*

- I do not know.
- No, not to my knowledge.
- Yes, the following measures can be recommended for the following countries:

... ..
... ..
... ..

* For ideas, view table 5.1.

1.4 Which **parameters** play an important role in your country's international marketing endeavours?

- Quality of education
- Reputation of HEIs
- European location
- Cost of study
- Cost of living
- Others:

...
...
...

2 MARKETING AGENCIES AND CONSORTIA

2.1 Does your country have one or more **national agencies (f. ex. non-governmental, but partially funded/commissioned by the government)**, like CampusFrance or DAAD for example, that support HEIs in their marketing efforts?

- No, it does not.
- Yes, it does: for example ...

2.2 Does your country have a **ministerial department** that takes care of national **HE system promotion**?

- Yes, it does.

If you like you may comment or specify: ...

- No, it does not.
- I do not know.

2.3 Do **commercial agencies** play a role in marketing efforts of HEIs?

- I do not know.
- No, they do not.
- Yes, they do, to a great extent.
- Yes, they do, to a growing extent.
- Yes, they do, to a lesser extent.

2.4 Do HEIs in your country form **consortia** in order to market themselves, such as the "Hessen Universities" consortium in Germany, for example?

- I do not know.
- Yes, they do, to a great extent.
- Yes, they do to a growing extent.
- Yes, they do to a lesser extent.

3. EUROPE AT FAIRS

3.1 Have HEIs **in your country** participated in European Higher Education Fairs (**EHEFs**) within the last five years?

- Once
- More than once
- Never
- I do not know.

3.2 Have you as **an individual** or has a representative from your country participated in European Higher Education Fairs (**EHEFs**), **as a speaker**, panellist or organiser for example?

- Once
- More than once
- Never

If you like you may comment / specify: ...

3.3 Have you as **an individual** or has a representative from your country participated in European Higher Education Fairs (**EHEFs**) **as a visitor**?

- Once
- More than once
- Never

If you like you may comment / specify: ...

3.4 Have HEIs from your country participated in fairs **within a consortium** of European universities or European organisations, at “Europosgrads” for example?

- Once
- More than once

If they have, do you know which partners formed the consortium? Please, name partners:

...

- Never
- I do not know.

4. CONFERENCES, SEMINARS ON MARKETING INTELLIGENCE / KNOWLEDGE WITH RELEVANCE TO THE EHEA

4.1 Have **your HEIs participated in conferences or seminars** that were set up to disseminate information on, for example, European mobility, or that were set up to promote the EHEA or ERASMUS MUNDUS and the like?

- Once
- More than once
- Never
- I do not know.

If you like you may comment / specify: ...

4.2 Do **HEIs** in your country **offer** further training in **international marketing**?

- I do not know.

- Yes, they do, to a great extent.
- Yes, they do to a growing extent.
- Yes, they do to a lesser extent.

If you like you may comment / specify: ...

4.3 Do HEIs in your country offer further training in marketing themselves on a European level?

- I do not know.
- No, they do not.
- Yes, they do, to a great extent.
- Yes, they do to a growing extent.
- Yes, they do to a lesser extent.

If you like you may comment / specify: ...

4.4 Do national or commercial agencies in your country organize / offer seminars on international marketing of HEIs?

- There are no such agencies.
- I do not know.
- No, they do not.
- Yes, they do, to a great extent.
- Yes, they do to a growing extent.
- Yes, they do to a lesser extent.

4.5 Do HEIs in your country send representatives to seminars or workshops (offered by iDA or GATE-Germany for example) that were set up to teach marketing know-how or marketing strategies with specific relevance to promoting the EHEA?

- I do not know.
- Often
- Sometimes
- Never

If you like you may comment / specify: ...

4.6 What kind of topics would typically be covered at such conferences or seminars?

- I do not know.
- The following (please give examples):
-
-
-
-

5. MARKETING TOOLS USED WITH REGARD TO PROMOTING THE EHEA

5.1 Which of the following marketing tools have your HEIs employed to promote the EHEA? (The weights of the individual tools should be made clear by ranking them individually:

- 1 means: very often used*
- 2 means: often used*
- 3 means: sometimes used*
- 0 means: to my knowledge this tool is not used)*

List of tools:

Advertisements (print; i. e. in newspapers, journals, magazines, periodicals)	
Advertisements (broadcast; i. e. radio/tv commercials)	
Advertisements (cinema commercials)	
Advertisements (multi-media; f. e. on-screen presentations, CD-ROMs, DVDs, podcasts)	
Advertisements (online; f. e. static/animated banners, pop-up ads)	
Advertising mail (direct mail)	
Advertising mail (email marketing)	
Search engine advertising	
Social media engagement (Facebook, LinkedIn, MySpace, Twitter, Wikipedia, YouTube)	
Social network building (by using f. e. Ning or Drupal)	
Blogs, chats or discussion boards	
Webinars	
Websites	
Broadcast (presentation of the HEI in university radio programmes)	
Leaflets and brochures	
Outdoor advertising (posters, banners)	
Postcards	
University directories (catalogues which list universities and degree courses – print or online)	
Telephone help-lines	
Fairs and road shows	
Event marketing	
Merchandising and give-aways	
Co-branding	
Press relations	
Sponsoring	

5.2 If applicable, please list up to **four additional marketing tools** that have been employed in your institutional environment to promote the EHEA. Feel free to also comment on their relevance and usefulness from your perspective! You may also list a web link in order to give an example of the tool and its usefulness and / or relevance.

...
...
...
...

6. WHEN PROMOTING THE EHEA, WHAT MESSAGES SHOULD BE SENT OUT?

...
...
...
...

7. DO HEIS IN YOUR COUNTRY HAVE EU-FUNDED CO-OPERATION OR PROMOTION PROJECTS SUCH AS ERASMUS MUNDUS, EU JAPAN OR ATLANTIS?

- I do not know.
- Yes, they do, to a great extent.
- Yes, they do, to a growing extent.
- Yes, they do, to a lesser extent.
- No, they do not.

If you like you may comment / specify / give examples:...

8. DO HEIS IN YOUR COUNTRY EMPLOY STAFF ESPECIALLY DESIGNATED TO SUPPORT EU FUNDING APPLICATION?

- I do not know.
- Yes, they do, to a great extent.
- Yes, they do, to a growing extent.
- Yes, they do, to a lesser extent.
- No, they do not.

If you like you may comment / specify: ...

9. IF YOUR COUNTRY HAS AN AGENCY (SUCH AS DAAD, CAMPUSFRANCE OR NUFFIC), DOES THIS AGENCY ACTIVELY MARKET EHEA?

- I do not know.
- Yes, it does, to a great extent.
- Yes, it does, to a certain extent.
- Yes, it does, to a lesser extent.
- No, it does not.

If you like you may comment / specify: ...

10. TO WHICH EXTENT DOES EU FUNDING PLAY A ROLE IN MARKETING EHEA?

- I do not know.
- To a great extent.
- To a certain extent.
- To a lesser extent.
- It does not at all.

If you like you may comment / specify: ...

11. WHICH INFORMATION GAPS WOULD YOU WANT TO HAVE FILLED BY EHEA SOURCED INFORMATION?

...
...
...
...
...

12. ROOM FOR ANY ADDITIONAL COMMENT OR QUESTION FROM YOUR SIDE:

...
...
...
...
...

THANK YOU FOR YOUR KIND CO-OPERATION!

Information and Promotion Network

Four themes: Quality, Diversity, European Dimension, Recognition

DRAFT Key messages on the EHEA:

1. Diversity

The European Higher Education Area: Strength in diversity

The European Higher Education Area (EHEA) brings together 47 partner countries, stretching from Norway, Sweden and Finland in the North to Italy, Greece and Malta in the South, from Ireland and Portugal in the West to Turkey, the Ukraine and Kazakhstan in the East. This vast territory offers endless opportunities to experience different peoples, languages, cultures, histories, technological and religious backgrounds, as well as different natural and urban environments.

Within this diversity, there is something that is common to all EHEA partners: they all stand for quality education. Through the Bologna Process, EHEA countries have developed compatible higher education systems to enhance the variety of opportunities for students, including joint degree programmes, the mutual recognition of degrees and diplomas, improved credit transfer between universities and better facilities for international students.

Convergence, not standardisation: Within the overall EHEA common framework, each country retains its own historical and cultural traditions, bringing unique characteristics to its higher education institutions and providing many opportunities for sharing different experiences. The purpose of the Bologna Process has not been to standardise all European higher education, but to render the different national systems more compatible, more transparent and more locally and globally responsive.

47 diverse countries, international diversity with a common understanding: The diversity of the countries of the EHEA remains its strength. This diversity is underpinned by common values and objectives for higher education: these include student centred learning, quality assurance, equity of access to higher education, the recognition of qualifications, and a European commitment to internationalisation. These common values are underpinned by shared tools and frameworks, at the disposal of higher education institutions, students and governments.

One process, with diverse applications: Each country has adopted the Bologna Process in its own way. Yet this diversity of applications is built on a shared foundation: quality standards and growing a culture of quality, compatibility of systems based upon a Bachelor Master Doctorate degree structure, tools for recognition such as the diploma supplement and ECTS, a European Qualifications Framework, under which the basic parameters of a degree are defined, as well as the expected learning outcomes of a student.

Multi-speed, towards common objectives: As the EHEAs are intrinsically diverse, it also works at various speeds. Some countries have adopted the reforms of the Bologna process faster, while other countries are still in the process of undergoing fundamental change. All higher education institutions are moving towards a true student-centred learning approach. The mobility of students and scholars will continue to grow, and the creation and dissemination of knowledge will increasingly take place across borders. The EHEAs therefore form a dynamic environment, which will continue to consolidate change, but also evolve in years to come.

2. Recognition of qualifications

Recognition of qualifications for study and work abroad

The purpose of recognition is to make it possible for learners to use their qualifications from one education system in another education system or country – for either further study or work - without losing the real value of those qualifications. This is an objective of the Bologna Process, in order to encourage greater mobility of students and qualified workers across Europe, including mobility from other parts of the world.

The European Higher Education Area now provides a transparent framework for this recognition, bridging diverse education systems with different traditions. And the new European three cycle higher education framework of Bachelor, Master and Doctoral studies allows for the mutual recognition of qualifications, study periods and learning outcomes.

This objective of the EHEA is supported by the Council of Europe/UNESCO Convention on the Recognition of Qualifications concerning Higher Education in the European Region ([Lisbon Recognition Convention](#)), an international legal instrument which the EHEA countries have ratified to ensure the fair recognition of qualifications.

This recognition is not an automatic process, but is built on a set of common transparent tools, criteria and procedures. These include the [Diploma Supplement \(DS\)](#) and the [European Credit Transfer and Accumulation System \(ECTS\)](#), which facilitate the transfer of skills and knowledge gained in one country to another.

The recognition of qualifications falls within the competence of each country. In most cases, this means that universities are responsible for the recognition of qualifications for the purpose of further study, whereas professional bodies or employers are responsible for recognition for the purposes of the labour market.

The EHEA also benefits from the [ENIC-NARIC network](#) which provides reliable, easily understandable and easily accessible information on education systems and qualifications frameworks across Europe, in cooperation with similar networks in other parts of the world.

Each EHEA has a national action plan to improve the recognition of qualifications, and detailed reports and monitoring take place on a regular basis to ensure further improvements in recognition procedures and practice:

3. European Dimension

*Discover the European Higher Education Area –
an advantage for personal growth and your career*

Studying in the European Higher Education Area (EHEA), the world's wealthiest and largest economy with over 700 million people, offers you the possibility to choose between almost 50 countries and more than 4,000 higher education institutions, among them the oldest and most prestigious universities in the world. You benefit from high-quality education, modern teaching methods, advanced technology, good student services and a wide variety of courses and academic programmes offered by different types of universities. These include universities ranked in the world top 100 as well as small teaching-led colleges, all providing excellent value for money.

In order to guarantee the high quality of their education systems, all EHEA countries are using the agreed European Standards and Guidelines for Quality Assurance.

When studying in the EHEA, you will benefit from a friendly multi-cultural community and Europe's enriching history and diversity of cultures and languages. If you have a good command of English only, don't worry! English is being offered as a language of instruction by a growing number of European universities across many countries.

If you opt to come to Europe, you will choose a safe and peaceful destination with relatively smooth access to higher education and excellent learning and research opportunities. It also means that you are always in close proximity to a neighbouring country. This creates an atmosphere where knowledge, research and expertise is gladly shared and pooled; where learning and intellectual growth are stimulated and cherished. Compatible educational systems, easily readable and comparable degrees at undergraduate and graduate level as well as common tools for the recognition of qualifications (ECTS, Diploma Supplement) across the EHEA allow you to gain a truly European experience by studying and living in two or more European countries. When you enrol in a joint European study or doctoral programme with double or joint degrees, you will spend a substantial period of time in at least two EHEA countries and experience different European cultures and academic environments. In other words, you will gain new expertise and improve your foreign language competence and intercultural skills. This will help developing your personality and make you more attractive for the global labour market.

4. Quality assurance

Enhancing the quality of European higher education

One of the objectives of the Bologna Process has been to enhance the quality of European higher education, through greater European cooperation on quality assurance criteria and methodologies.

Quality assurance is the way in which a university can ensure that the standards and quality of its educational provision are being maintained and enhanced. It is the responsibility of the universities themselves to ensure that quality assurance of its functions and activities is undertaken in a meaningful and effective way, through both internal and external quality assurance mechanisms. These mechanisms should cover all the functions and activities of the university: teaching and academic programmes, services, research, buildings, and equipment.

Quality assurance fulfils different needs: it provides information to the public about the quality and standards of a university. It also provides the university with an objective assessment of where and how it can improve. In this respect, the external evaluations are focusing either on study programmes, on institutions or on a combination of both.

Quality assurance is also important in enhancing the mobility of students and graduates. Through increased knowledge and trust across different European higher education systems, the obstacles to this mobility can be removed.

As part of the Bologna Process, all participating countries have adopted the Standards and Guidelines for Quality Assurance in the European Higher Education Area ([ESG](#)). Since 2005, these common European standards and guidelines have been used by universities and quality assurance agencies across Europe. This has led to much greater awareness and transparency regarding evaluations of universities and national agencies.

Through the ESG, evaluations of universities across Europe now include students, external stakeholders and experts from outside the university's own country as part of the evaluation team.

European quality assurance is based on a system of autonomous universities and independent quality assurance agencies, as necessary conditions for effective processes which lead to quality improvement and the provision of accurate and consistent information to the general public.

A European Quality Assurance Register for Higher Education ([EQAR](#)) has also been created, which provides information on quality assurance agencies that are in substantial compliance with the ESG and which can undertake evaluations in any European country.



IPN follow-up structures

The 2015 Promotion Project

Project proposal

Status June 10, 2011

N.B. *This is a working paper. In no way does it prefigure the project's ultimate shape and form. It does not claim to represent the entire spectrum of previous IPN debates. Conversely, it invites IPN members to contribute, adapt and cross out. Its sole purpose is to offer raw material to be consensually refined so that it would eventually encapsulate the IPN idea of a follow-up structure tackling the issue of promoting an educational space.*

▪ Intro

Depending on the mode of financial support for the project this paragraph will briefly delineate the wider framework the project will be embedded in. For example: The project shall be filed for the „Erasmus Mundus Programme/Action 3“, which strives to support projects dedicated to enhancing the attractiveness of Europe as an educational destination and a centre of excellence at world level. The 2015 Promotion Project fully subscribes to the tenets laid down by Action 3. Its activities chiefly pertain to the international dimension of all aspects of higher education, specifically its promotional domain.

▪ Reasons

In 2007 the Ministers responsible for higher education in the countries of the Bologna Process adopted the strategy “The European Higher Education Area in a Global Setting”. This strategy included the promotion of the attractiveness and competitiveness of the EHEA as a core policy area. In the 2009 Leuven/Louvain-la-Neuve Communiqué a network within the BFUG for better information on and promotion of the Bologna Process outside the EHEA was set up. This Information and Promotion Network's (IPN) main purposes were defined as follows:

- Provision of clear and consistent information on the Bologna Process and the European Higher Education Area (EHEA) in countries outside the EHEA.
- Enhancing the international promotion of the European Higher Education Area.
- Putting the promotion of national higher education systems in a European context.

Its specific tasks, as laid down in the Terms of Reference included:

- Design measures to enhance the promotion of the EHEA and of national higher education systems as part of the EHEA.

It is vital for the future direction of the EHEA to **fathom the potential of an encompassing promotion strategy**. In a bid to devise an **encompassing promotion strategy to be tabled to the 2015 Ministerial Conference** this project seeks to address key issues surrounding

the promotion of the European Higher Education Area. In so doing it builds on the results of the IPN, notably the conclusions drawn from a survey carried out by DAAD and the outcome of the OeAD-organised Expert Round Table (ERT), held in Vienna in early 2011. The DAAD survey provided a first panoramic glimpse of the current EHEA status quo of marketing initiatives and tools. On this basis the ERT offered a professional introduction to basic concepts of higher education promotion and marketing, it provided consensus on essential definitions (e.g. marketing, information, promotion) and most vitally, sparked debate inspired by Louise Simpson's (The Knowledge Partnership) expert input.

The IPN as a network within the context of the BFUG's International Openness Working Group quickly identified a set of key questions, which need to be tackled in greater detail and with a sustained degree of scientific thoroughness beyond the scope of the current IPN set-up. The 2015 Promotion Project shall continue where the IPN faced insurmountable limitations due to the voluntary nature of the network, the complicated professional interaction of an intergovernmental committee structure, lack of financial support and the inherent excessive scope of its tasks. The 2015 Promotion Project shall strive to devise an **EHEA-encompassing, politically-backed, forward-looking promotion strategy** which will **enhance visibility and prestige of the EHEA worldwide**. It will operate as an **expert group** with a clear mandate and political backing. The IPN future role in this context would be to act as a consultative body that the project team could cooperate closely with.

▪ **Aims and objectives**

The 2015 Promotion Project seeks to address the need of a comprehensive promotion strategy for the European Higher Education Area as stipulated in the 2007 London Communiqué.

The 2015 Promotion Project will develop **strategies and tools in order to instigate and facilitate the development and adoption of an encompassing EHEA promotion strategy**.

Anchored in the original IPN mandate ('Design measures to enhance the promotion of the EHEA and of national higher education systems as part of the EHEA. '), the 2015 Promotion Project aims at establishing a strategy for the promotion of the European Higher Education Area. In a first step it seeks to address the **feasibility** of such an endeavor. It shall furthermore indicate **success factors** and potential pitfalls within in an encompassing **SWOT analysis**. The 2015 Promotion Project strives to answer the following key questions left unanswered by the IPN:

- **What** is the EHEA trying to communicate? **Why** and by **when**?
- What countries and people does the EHEA want to communicate with about the EHEA, i.e. which **key markets** can be identified?
- What are the **key messages** about EHEA?
- Can the EHEA be uniquely **branded and promoted**? If not, what are the implications and alternatives?
- Is the EHEA a **product or a loose affiliation** of friendly nations with some shared intentions?
- Who are the **prime target groups** and what are their perceptions of the EHEA, their expectations, motives, habits, wants, needs, etc.?
- What are clear objectives an EHEA promotion performance can be measured against, i.e. what are key **performance indicators**?
- How can reliable and regular **quality assurance** of the 'brand' be safeguarded?

The following recommendations, as put forward in the DAAD survey, shall also be pursued by and feature on the agenda of the 2015 Promotion Project:

- Create an **EHEA website** targeted towards potential students and young researchers from outside of Europe
 - explore links and potential synergies to “Study in Europe”
- Devise a **manual** to be operational in a peer learning context, which specifies strategies on how to market higher education institutions (as part of the EHEA). The manual will be geared towards national agencies and higher education institution's staff working on international marketing;
- In cooperation with the Bologna Secretariat - develop „**information packages**” about the EHEA that can be used on other websites for students and young researchers as well as in the press
- Conduct **research in key markets about perceptions of EHEA**, perceived benefits or hurdles to studying in the EHEA, the student decisionmaking process, etc;
- **Build ties between organizations and individuals** dealing with international higher education marketing by:
 - Hosting conferences and seminars that tackle the big issues faced by societies and HEIs around the world to showcase forward thinking initiatives in Europe;
 - Helping to build networks of marketing professionals within the EHEA to share best practices and create informal (or formal) training opportunities;
 - Actively participating in international education conferences with topics related to the EHEA;
 - Addressing EHEA marketing at forums that bring together key decision makers in the member countries.

▪ **Outputs and products**

- An evidence and research-based **feasibility study on branding the EHEA**
- A **research study on perceptions of the EHEA**, including perceived benefits or hurdles to studying in the EHEA, the student decision-making process, etc. in key markets
- A definition of **target groups and markets/areas**
- A set of **EHEA promotion messages** based on research and expertise input from vital players
- A recommendation on implementing reliable and regular **quality assurance mechanisms** to maintain the prestige and appeal of the EHEA brand
- A **website** targeted specifically at potential students and young researchers from outside of Europe
- A **manual** on strategies of marketing higher education institutions (as part of the EHEA)
- The design of ‘**information packages**’ on aspects of the EHEA tailor-made for student needs and press usage – this will be carried out in cooperation with the Bologna Secretariat
- An **action plan for creating platforms** for organizations and individuals dealing with international higher education marketing with a view to establish networks and harness the existing promotional potential

▪ **Impact**

The 2015 Promotion Project will offer an **encompassing promotion strategy** through harnessing the expertise of key player in the field. It will present **key promotion messages** based on research in visceral markets about perceptions of Europe, thus enabling:

- Individual members of the EHEA to **complement national promotion strategies** with **EHEA imbued promotion tools**, allowing them to broaden their promotional tool kit

- **Invigorated ties between organizations and individuals dealing with international higher education marketing**
- An atmosphere of trust between national players susceptible to novel **peer learning activities**
- A **boost to the global visibility of the EHEA** through designing an EHEA website specifically targeted towards potential students and young researchers from outside of Europe

DRAFT

▪ Project structure and team composition

The core project team shall be made up of **national higher education promotion experts** and complemented by an **external expert advisor**. Furthermore it shall draw on cooperation already established within the IPN context and integrate players such as ACA, EUA, ESU, the Erasmus Student Network as well as representatives from the EC. It shall report to a an **advisory board** made up of members of the **BFUG** and the **International Openness Working Group** respectively and featuring **members of the current IPN**, thus safeguarding continuity. Potential members of the core project team include representatives of Nuffic, the British Council, DAAD and CampusFrance. The **OeAD will offer to take the lead of the consortium**. These organisations shall be represented by their respective promotion/marketing experts. The core project team shall be complemented by an **external expert advisor**, potentially Ms. Louise Simpson, who has already been involved in IPN activities and is therefore acquainted with the project.

▪ Budget summary

There are two basic financial models to consider. Please bear in mind that any combination of the two models mapped out is equally viable.

1. The project shall be funded by **contributions from the current IPN member countries**. In this scenario a minimum overall budgetary frame of 100.000 € for the project's 3 year duration seems feasible. Broken down to individual country contributions this approach would entail an investment of around 2000 € per member state.

Expenditure	
Direct Costs	
Staff ¹	
Travel and subsistence	
Equipment	
Subcontracting	
Other	
Sub-Total Direct Costs	
Sub-total: Indirect costs	
Total Cost	

2. A project consortium will strive to realise the project within the **Erasmus Mundus Programme/Action 3** stream. The figures below indicate a tentative budget based on the following premises

- project duration: three years
- 2 meetings of the core project team per year
- 1 meeting with the advisory board/ IPN per year

Expenditure ²	
Direct Costs	
Staff	
Travel and subsistence	

¹ Plenary meetings should be kept to a minimum; instead a funded Master thesis on aspects of the project could be financed through the project. For a limited period of time a student could carry out research and provide valuable input and data to the overall project aims.

² ACA or DAAD could be consulted to give an estimation of the costs related to such a project.

Equipment	
Subcontracting	
Other	
Sub-Total Direct Costs	
Sub-total: Indirect costs	
Total Cost	

▪ **Project structure incl. tentative timetable**

Project phase	Work package title	Start	End
Project Management and Coordination	Continuous project monitoring, organisational and administrative support; checking envisaged benchmarks	01.05.2012	01.03.2015
Orientation phase	Feasibility study of branding the EHEA	01.05.2012	01.05.2013
	Research study on perceptions of the EHEA in key markets	01.05.2012	01.05.2013
	Remedial work on the design of key promotion messages		
Conceptual designing phase	Design of key promotion messages	01.05.2013	31.12.2013
	Design of a website specifically tailored to students and young researchers outside the EHEA	01.05.2013	01.03.2015
	Design of 'information packages'	01.05.2013	31.12.2013
	Design of a marketing manual for higher education institutions	01.05.2013	01.05.2014
	Design and launch of peer learning platforms	01.05.2014	01.03.2015
Dissemination and communication	Devising Dissemination and Communication Strategy	01.05.2012	01.03.2015
Post-processing and wrap-up			

▪ **Loose ends and open questions**

- The Budget Summary needs to be fleshed out – ACA's input would be dearly appreciated
- What is the role of the future Bologna Secretariat within the project?
 - Will it offer in-kind administrative and coordinating support?
- Project structure and the tentative time table need to be scrutinized, re-balanced and re-calibrated according to the agreed upon project pillars