
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. First survey results have been presented in Bonn in December 2010 and Vienna in January 2011 by Irene Jansen.

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Table of Contents

1. Introduction	3
1.1 Definitions	4
1.2 Respondents	5
1.3 National Agencies	6
1.4 Ministerial Departments Engaged in Higher Education Promotion	8
2. International Marketing Overview	9
2.1 Extent of International Marketing	9
2.2 Key Target Regions or Countries for International Marketing	11
2.3 Country-Specific Marketing Tools	12
2.4 Selling Points for HEIs in the EHEA	13
2.5 Additional selling points	14
3. Who Markets HEIs?	15
3.1 National Agencies and HEI Marketing	16
3.2 National Governments	18
3.3 Commercial Agencies	20
3.4 Consortia.....	21
4. Europe at Fairs and Conferences.....	22
4.1 European Higher Education Fairs (EHEFs)	22
4.2 Fairs with European Universities and/or Organizations.....	23
4.3 Conferences and Seminars that Promote the EHEA and Related Topics	24
5. Further Training.....	25
5.1 Training in International Marketing	26
5.2 Training in Marketing Within a European Context.....	27
5.3 Training by National or Commercial Agencies	28
5.4 Participation in Seminars and Workshops on EHEA Promotion.....	28
6. Marketing Tools and Messaging.....	29

6.1 Tools	29
6.2 Messages	31
7. The Impact of the European Union	32
7.1 Participation in European Union Projects	33
7.2 Staff for EU Applications.....	34
7.3 EU Funding.....	35
8. Conclusions and Further Questions.....	36
8.1 Findings.....	36
8.2 Role of EHEA in Providing Information.....	37
8.3 Market Research.....	39
8.4 Building Ties Across Borders and Organizations	39
8.5 Accessing Existing Funding Programs.....	40
8.6 Further Questions.....	41
8.7 Authors' Note	42
Appendix	43

“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
- 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 36 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

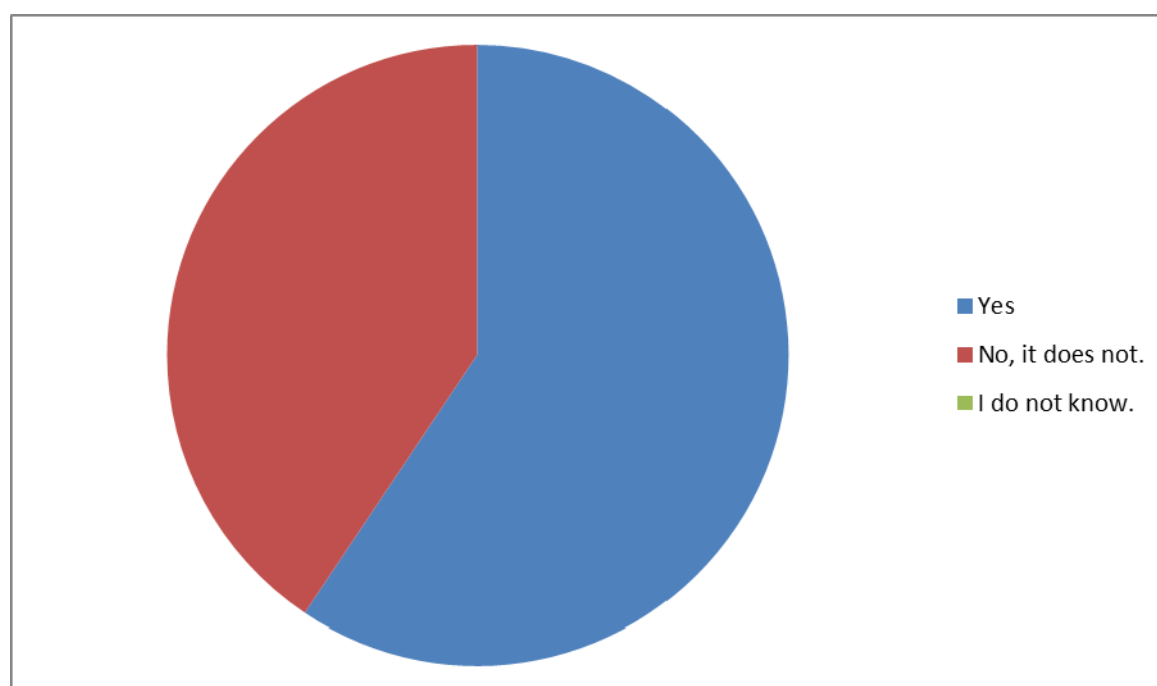
Twenty-two of the respondents named “national agencies” that were responsible for international higher education promotion in their countries in response to Survey Question #2.1. These are all publicly-funded agencies that work on a broad range of marketing and promotional activities to raise the profiles 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)



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 responses were given in answer to Survey Question #2.2, "Does your country have a **ministerial department** that takes care of national **HE system promotion**?"

- 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.

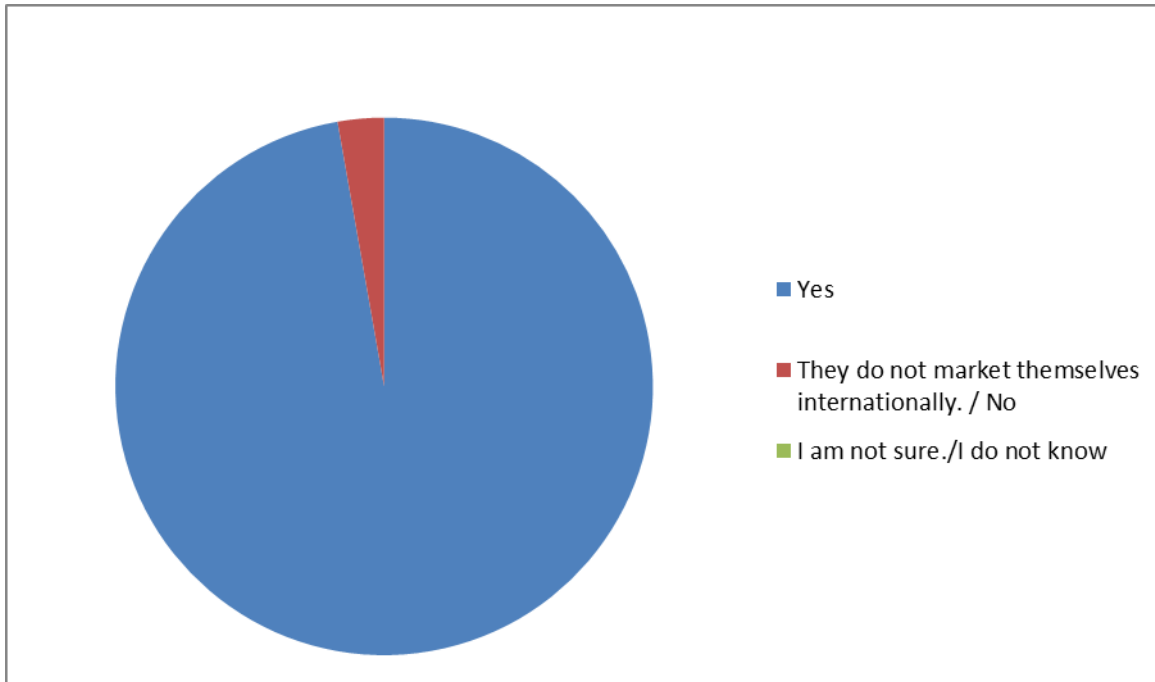
If the ultimate goal is to attract more students to the EHEA, however, the institutional and national efforts will almost certainly always have a greater impact than EHEA-wide initiatives, which is not to say that these efforts are not worth pursuing. The survey results revealed that there is already 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

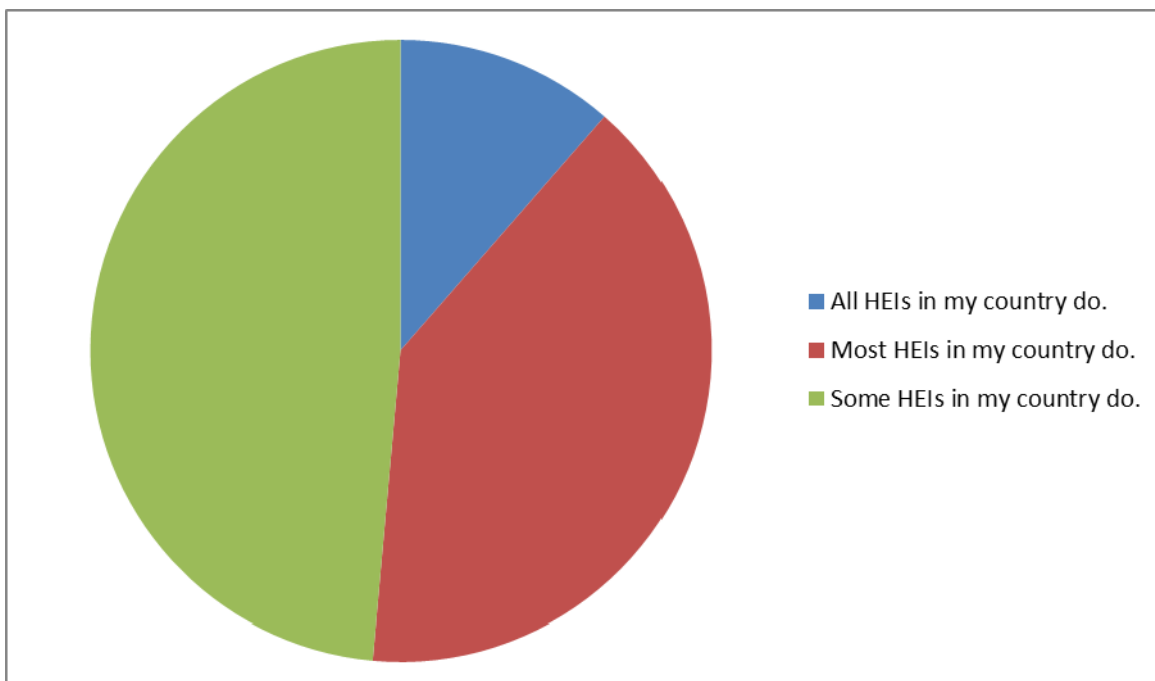
As we can see from Table 2 below, every respondent but one said that the higher education institutions (HEIs) in their country do market themselves internationally. Of course, this question can be interpreted quite broadly, so it would have been unlikely that many respondents would answer that their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

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



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)



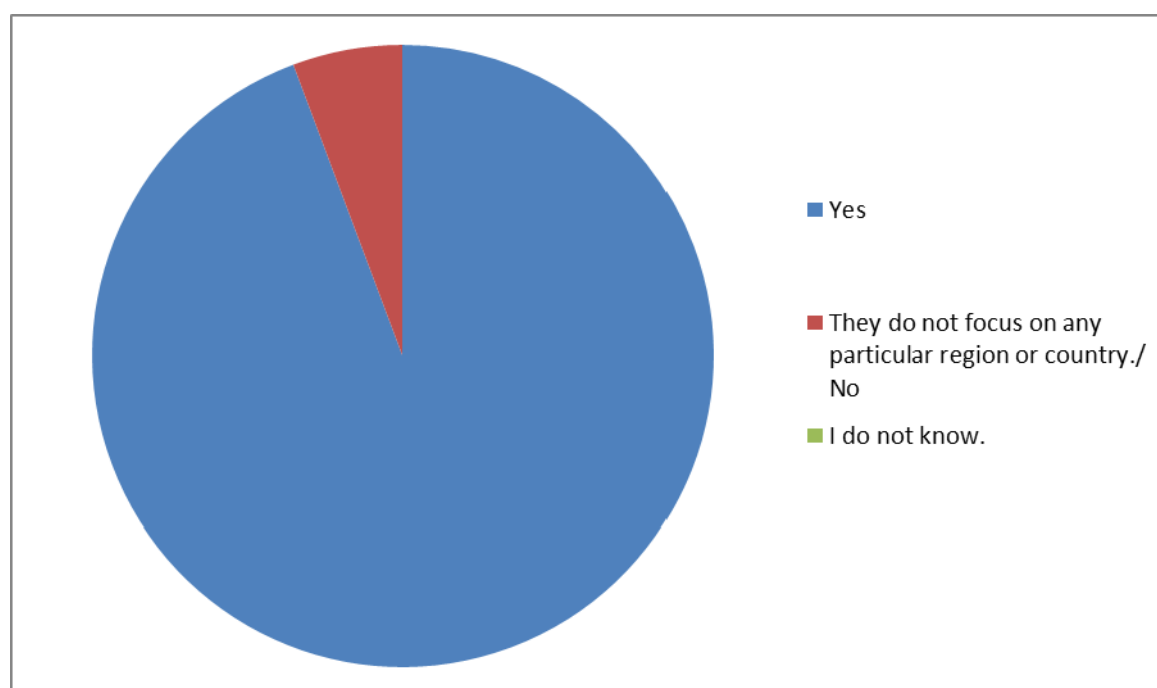
An additional follow up question for respondents who answered "Yes" to the first question shows that, while international marketing is widespread across the EHEA, only a slight majority said that "all" or "most" of the HEIs in their country do (see Table 3 above). It is important to also keep in mind 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)



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.

Twenty-nine of the respondents provided some additional information about the regions or countries that their HEIs were targeting and some clear trends emerged. Ten of the 29 mentioned “Europe”, with many respondents naming specific countries such as Germany, Finland, Poland, Greece, Russia, etc. European regions were also mentioned by nine respondents such as Scandinavia, “Mediterranean countries”, the Baltics, Central Europe, Former Soviet countries, 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:

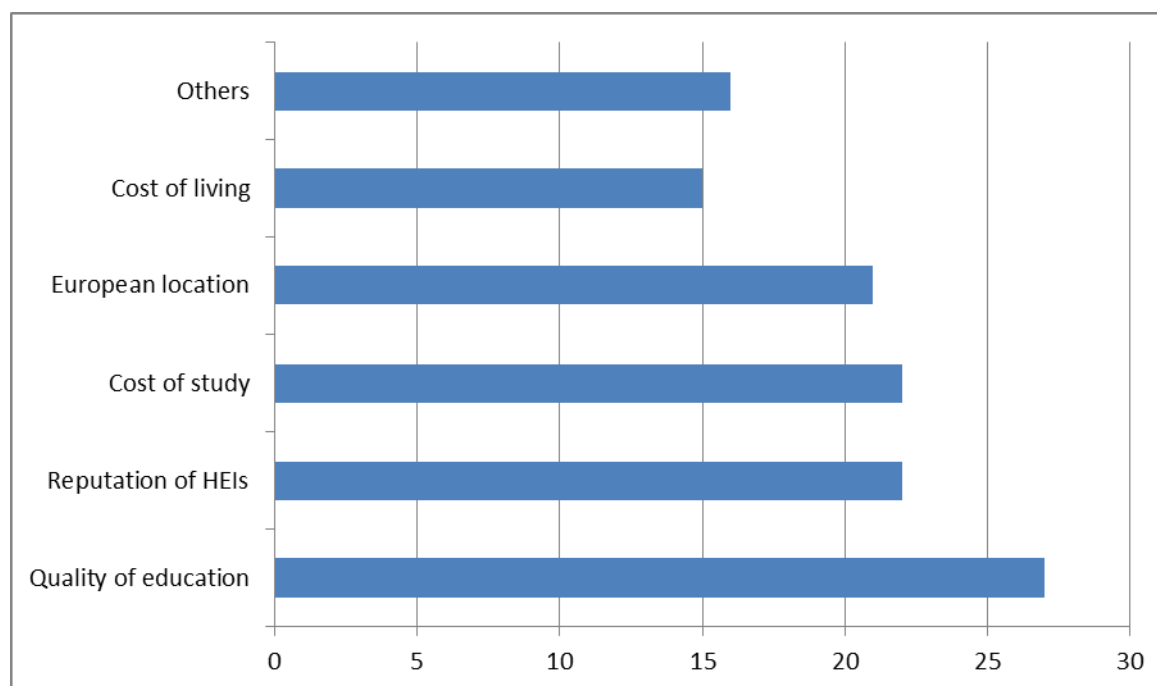
- Belgium (FR): “The development of marketing measures or tools is at an early stage amongst the HEIs and the French Community Wallonia-Brussels of Belgium. However, we can mention websites and brochures/leaflets as the most common tools developed by HEIs and by the public authorities.”
- Bosnia and Herzegovina: “Websites, leaflets and brochures, outdoor advertisement”
- 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 27 of the 35 respondents to this question, and the “reputation of HEIs” was selected 22 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)



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.

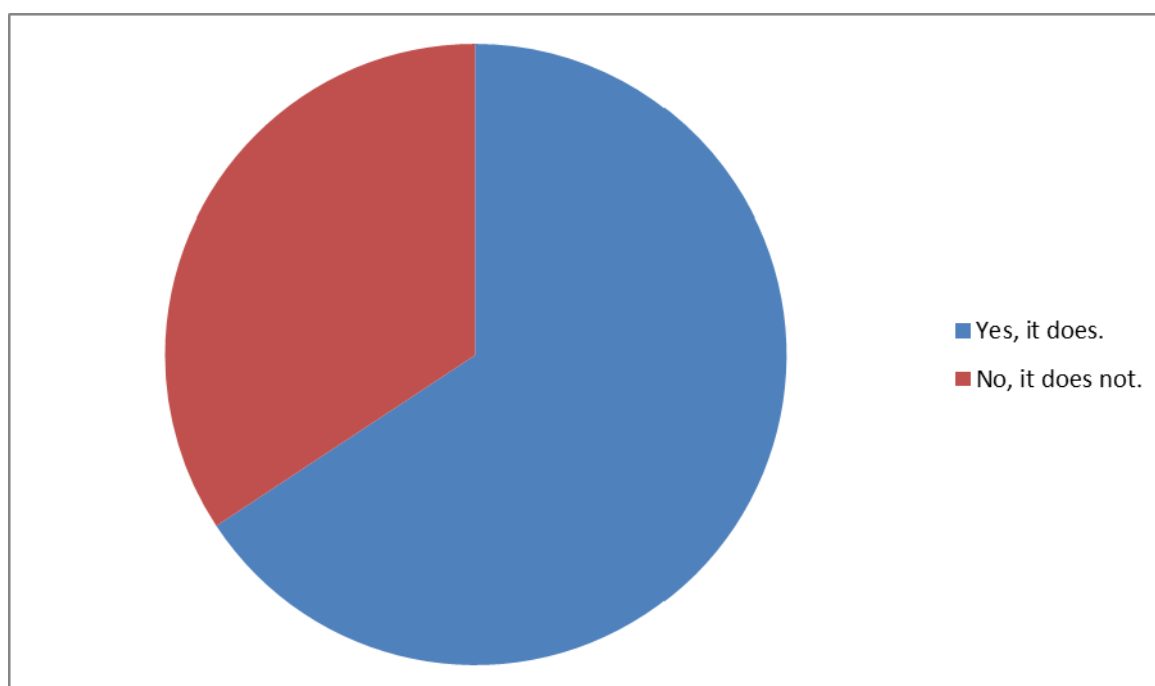
It should be noted that the questions (see Appendix for the full text of the survey) here were worded slightly differently, so the answers cannot truly be directly compared. What the survey wanted to find out was who was—in one way or another—engaged in marketing efforts. The first question about national 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 #9)



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

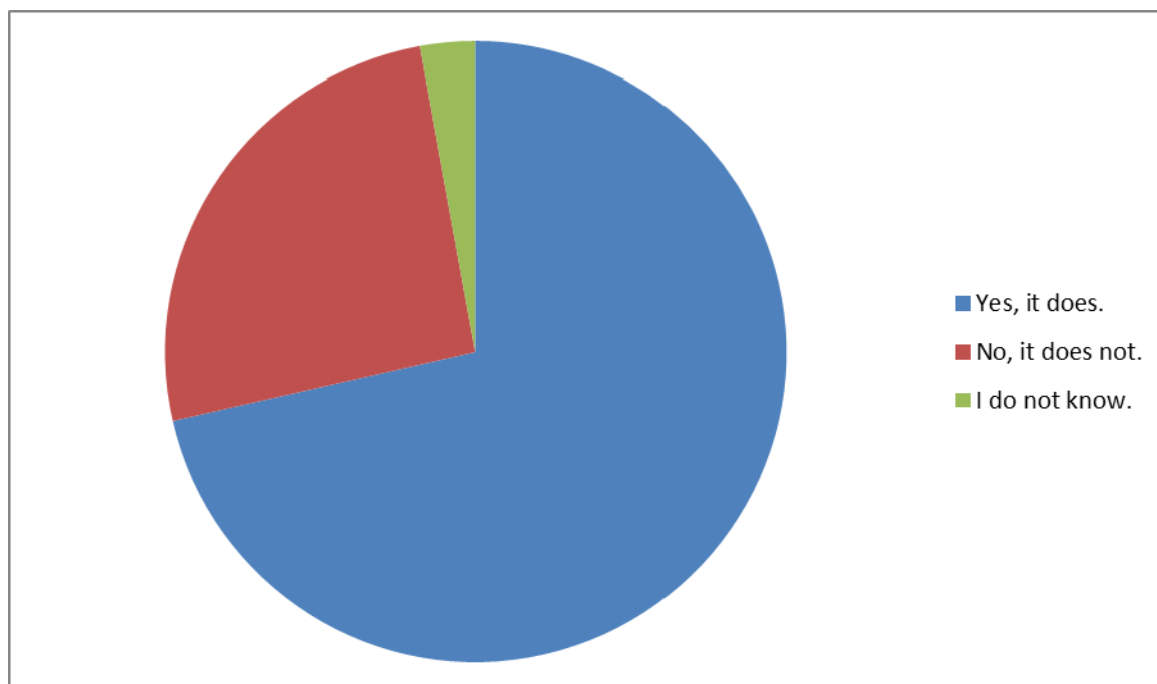
information and training, organizing national stands at fairs, providing or administering grants and other programs, etc.) as well as to ask HEIs directly how important they think these efforts are in improving their ability to attract top international students.

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)



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”

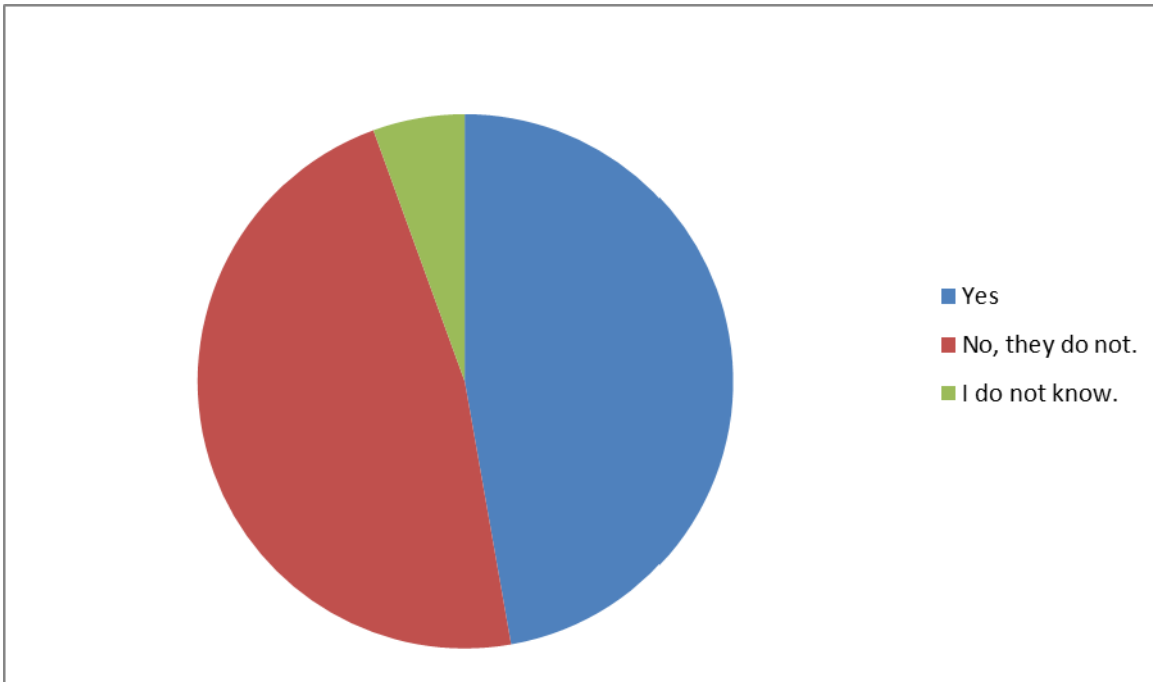
- Moldova: “But at the same time, two departments of Ministry of Education: International Relations and European Integration Department and High Education Department are involved in promotion of national HE system. Besides the Ministry of Education, there is also the Academy of Sciences who takes care 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)

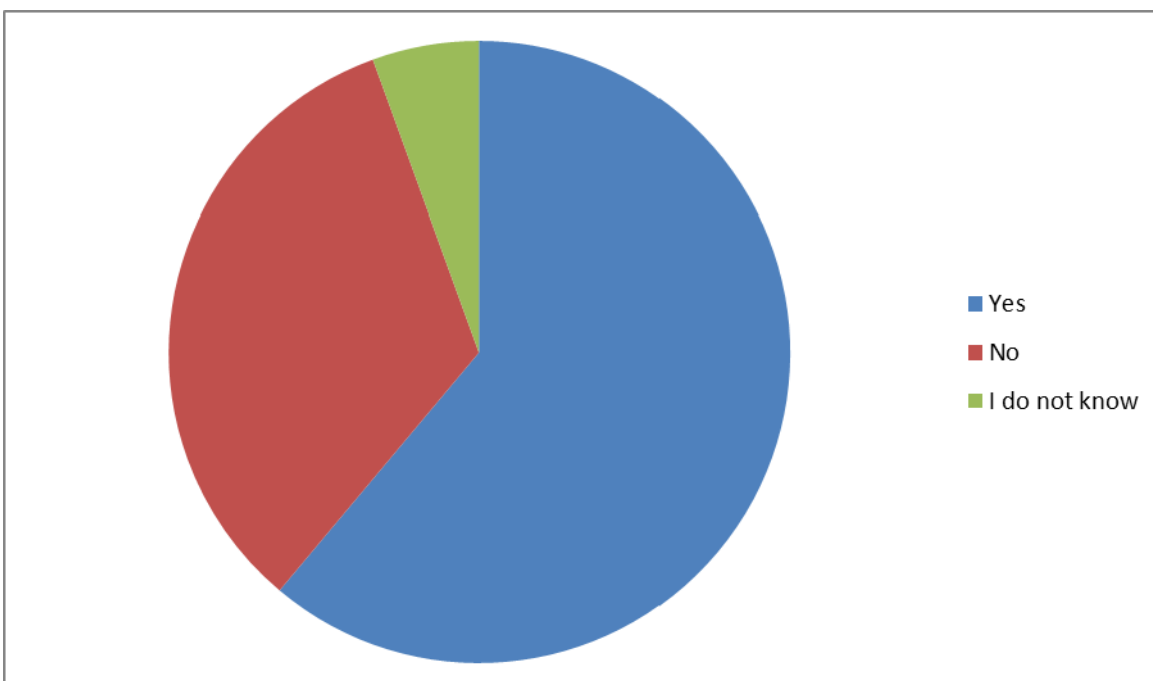


The roughly half of the respondents who said that commercial agencies do play a role mostly thought that this was “to a lesser extent”, although about a quarter of those respondents said it was growing.

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)



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 21 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

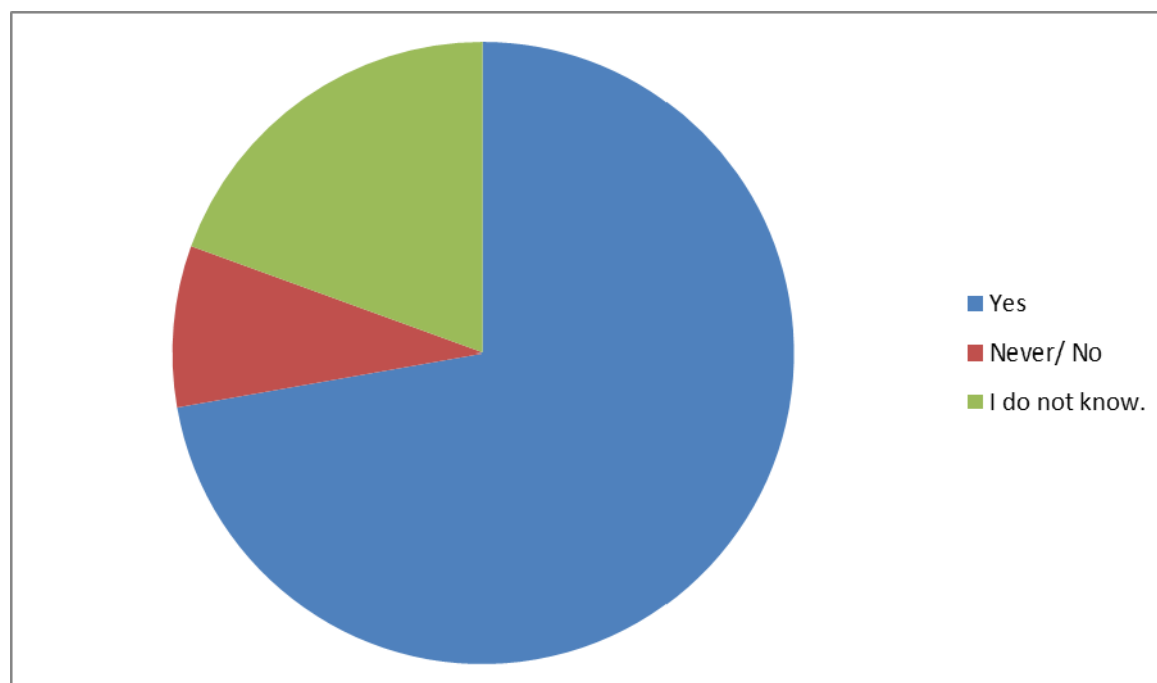
4.1 European Higher Education Fairs (EHEFs)

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.

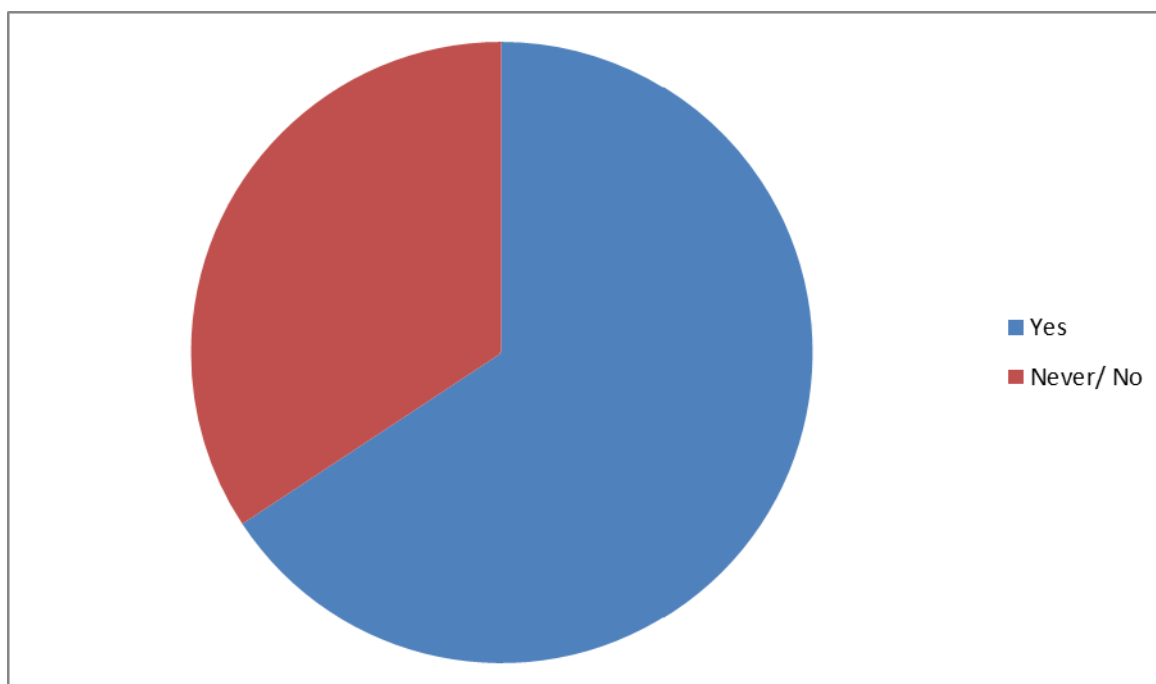
Table 11. Have HEIs in your country participated in European Higher Education Fairs (EHEFs) within the last five years? (Survey Question #3.1)



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.

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)

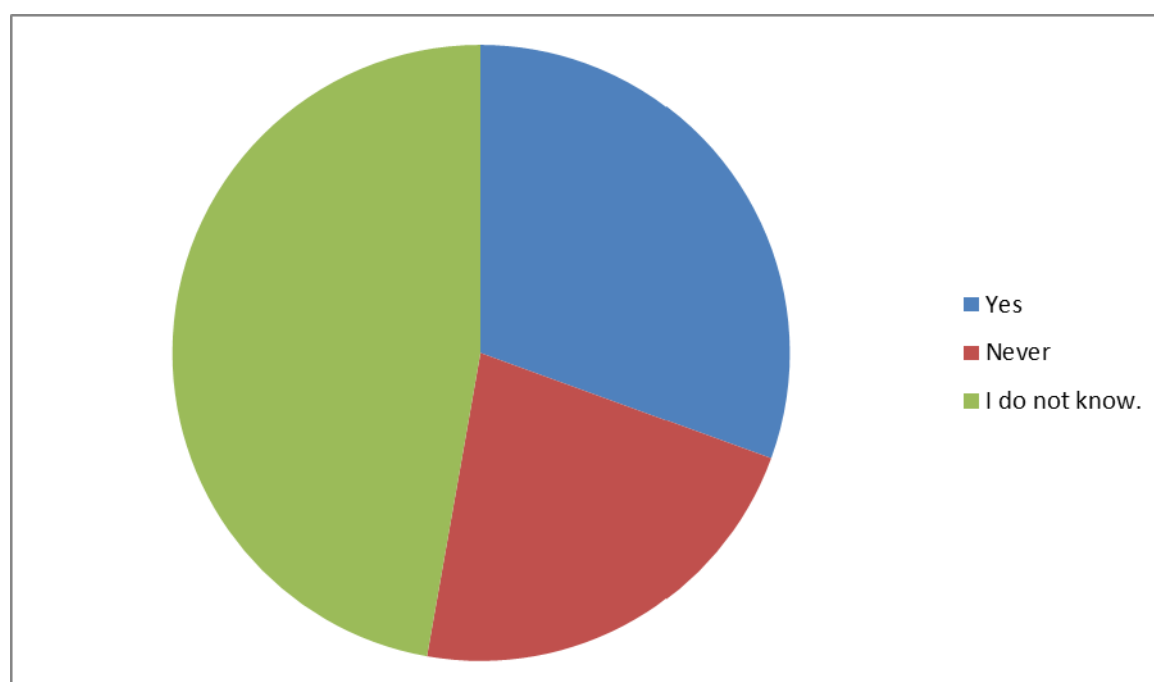


Of the 23 affirmative responses, 18 said this has happened “more than once” and four said only once. The responses included participation by representatives from national agencies, from ministries, from higher education institutions, and other related NGOs in EHEFs in various countries, as well as EAIE 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)



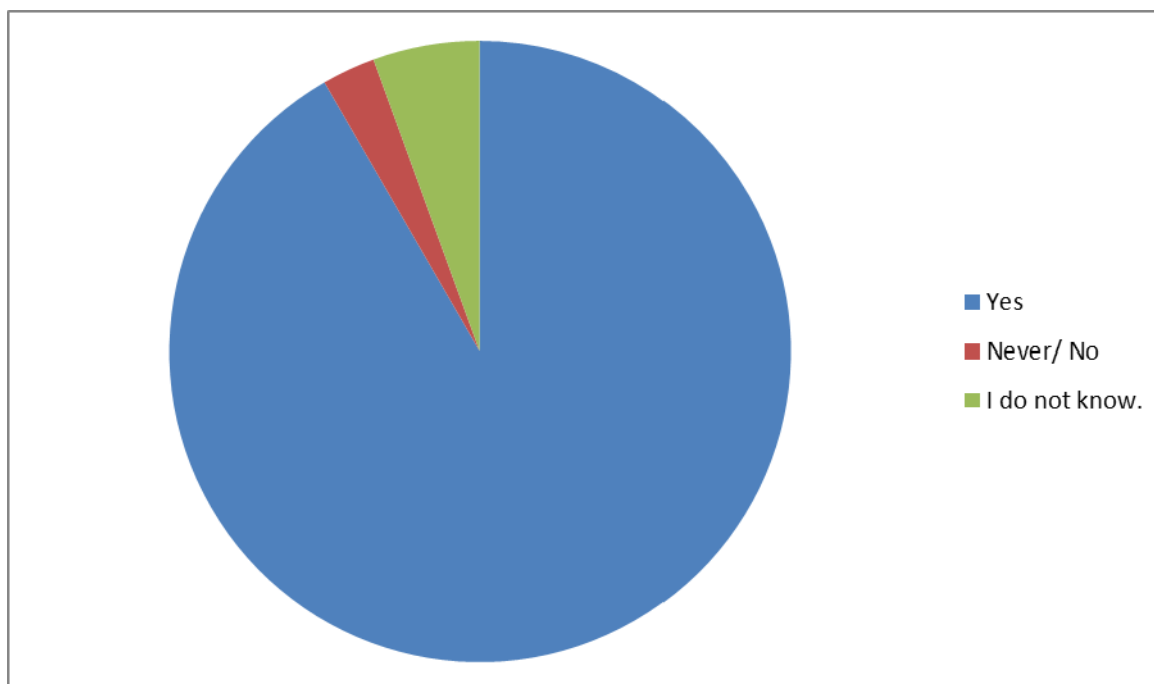
As can be seen in Table 15 above, a bit less than a third of respondents reported having participated in fairs with other European universities and/or organizations. The 11 respondents who indicated that HEIs in their country had participated in these types of fairs all said that they had participated “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 14 below). Thirty-one out of the 32 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)



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

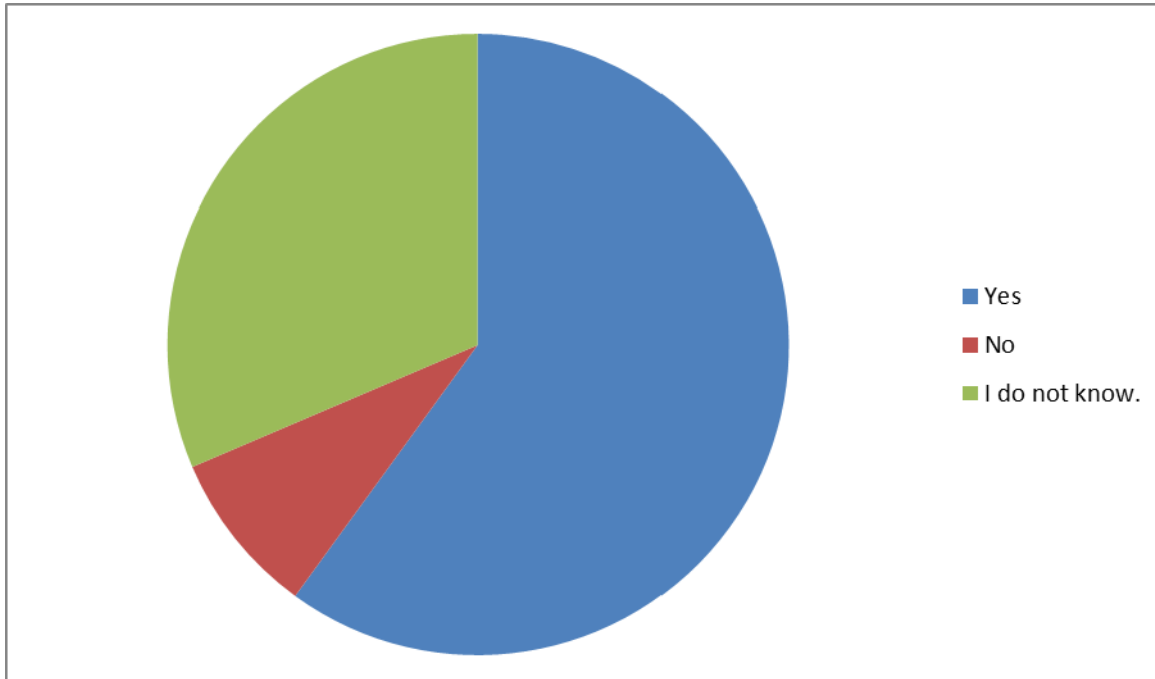
A short series of question delved into the importance of professional or continuing education courses in international higher education marketing. Although this survey only establishes a baseline across Europe—a snapshot of a moment in time rather than trends over time—it can be assumed that the demand 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)



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”. Eight 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:

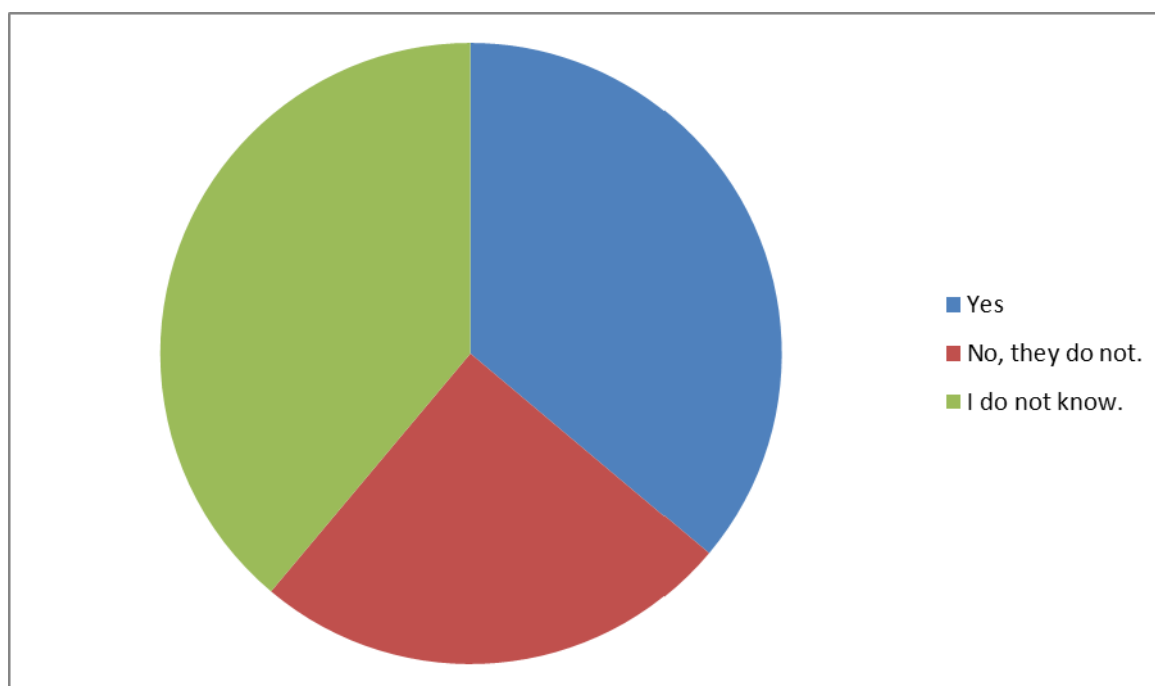
- Belgium (NL): “For their staff”
- Ireland: “Some of this is provided by the national promotion agency (see question above), in collaboration with HEIs. Others are provided in-house or are sourced by HEIs from commercial training bodies.”
- Moldova: “The University of the Academy of Sciences of Moldova 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 11 individuals responded 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)



None of the respondents answered that HEIs do this in their country “to a great extent”, only five 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:

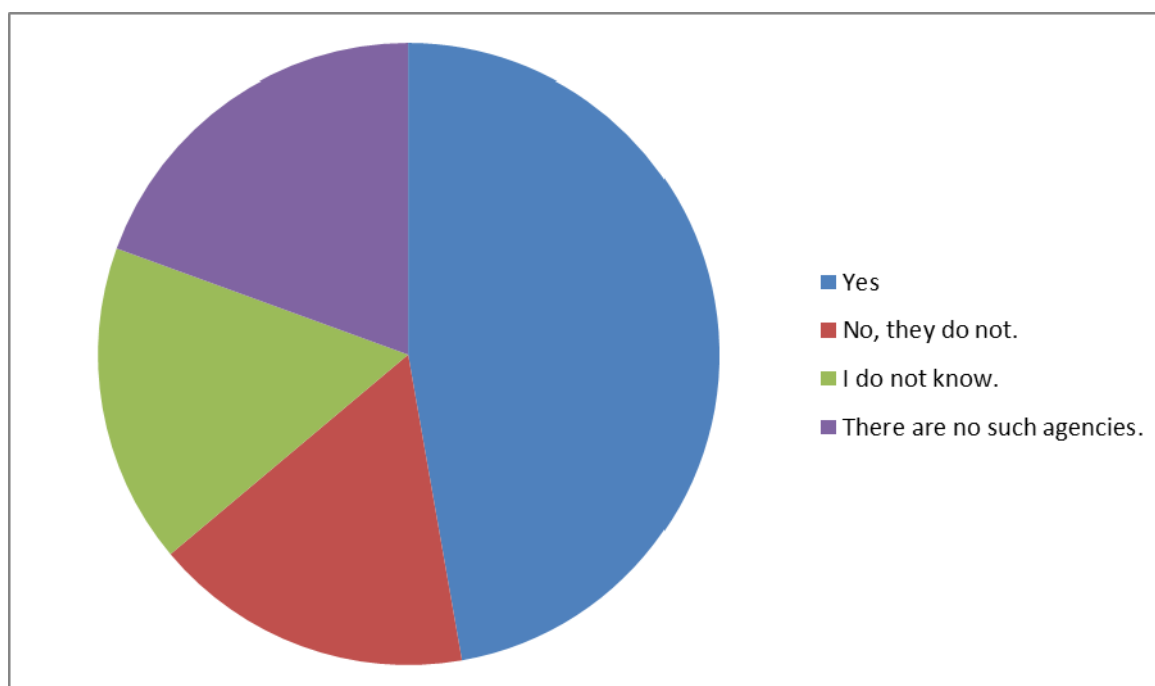
- Belgium (NL): “for their staff”
- Iceland: “At consortium meetings HEIs share experience and work together nationally. HEIs have also in cooperation with the Nordic countries participated in exhibitions in Europe and outside Europe.”
- Ireland: “European marketing is not dealt with in separate training 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)

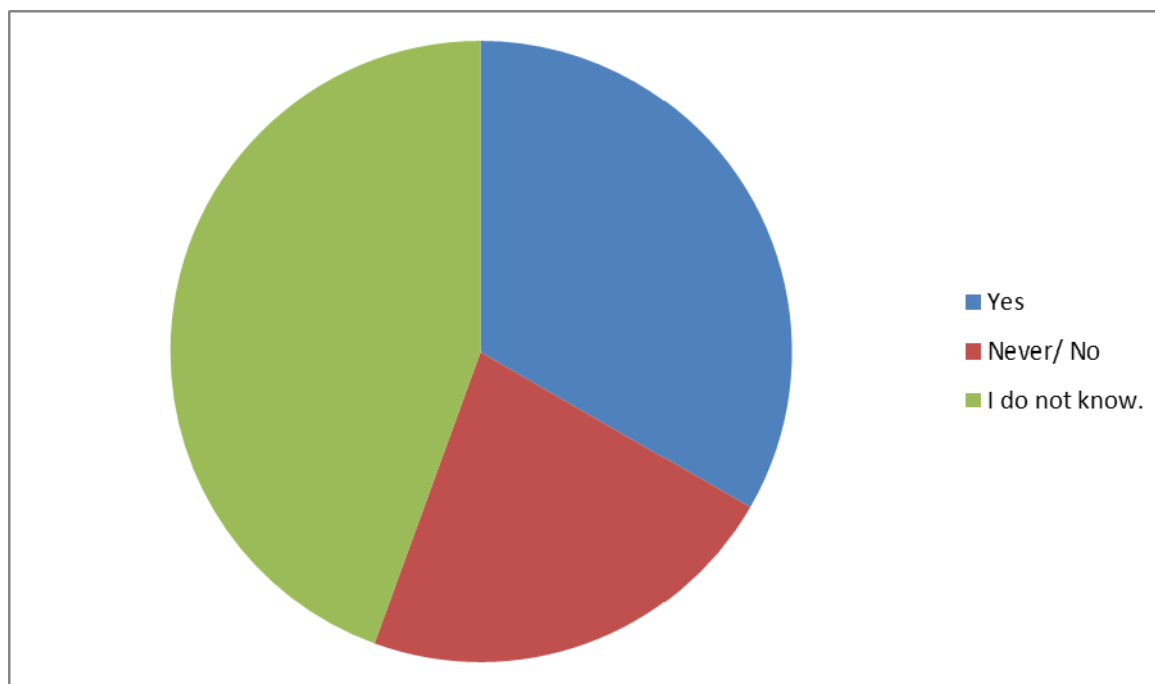


Of the countries where national or commercial agencies offer seminars on international marketing, two said this is “to a great extent”, seven said “to a growing extent”, and seven “to a lesser extent”.

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 12 respondents answered this question with one saying they send representatives to these kinds of seminars/workshops “often” and 11 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)



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

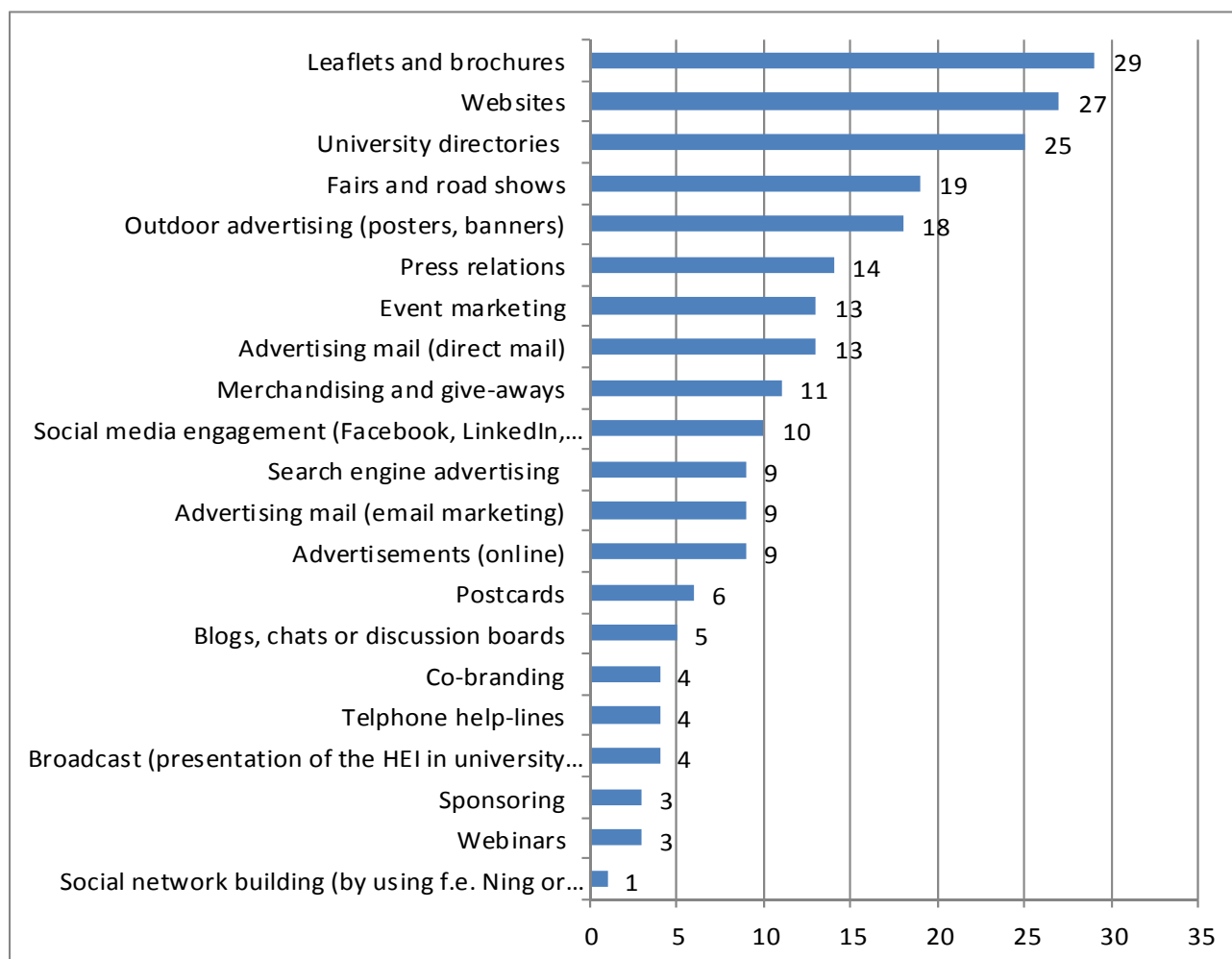
6.1 Tools

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 29, 27, and 25 (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. Table shows how many respondents answered "Very often used" or "Often used" for each category. (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)"

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 “
- 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, Attractivity, 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.

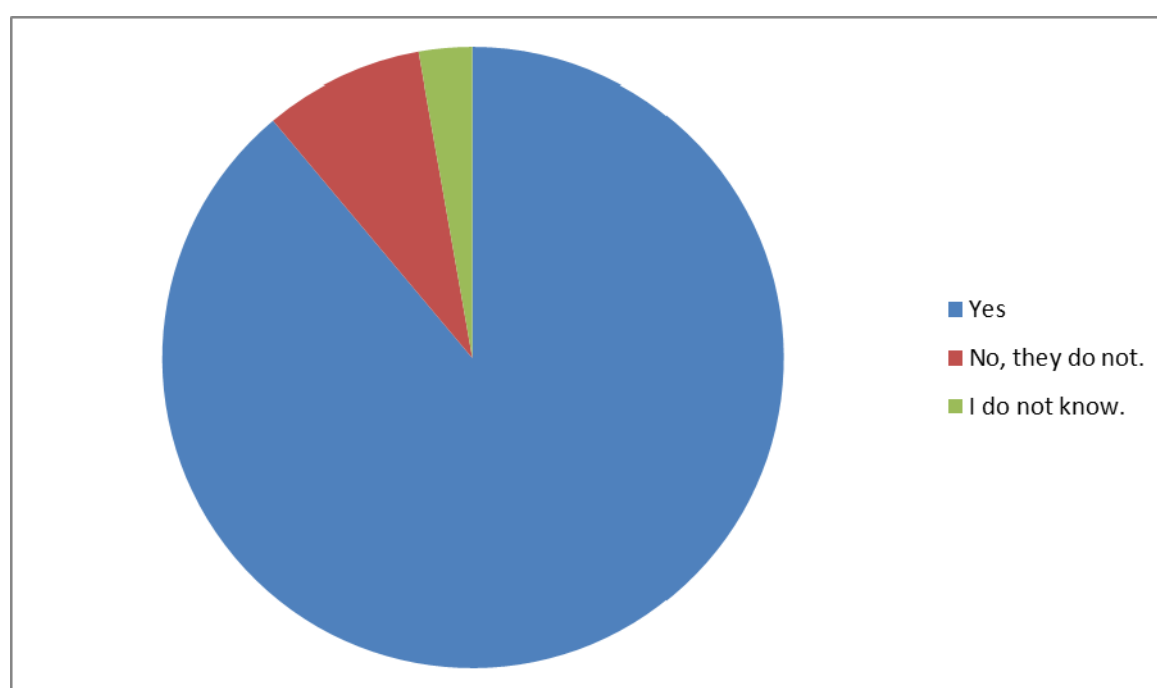
There are surely mutual benefits that the EHEA and the EU lend to each other, and prospective students are likely to be unaware (and probably uninterested) in distinctions made between the two—at least when it

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 23 of the survey respondents are members of the EU (the United Kingdom and Scotland answered the survey separately), 32 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 #7.1)



For the respondents who answered in the affirmative, six 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

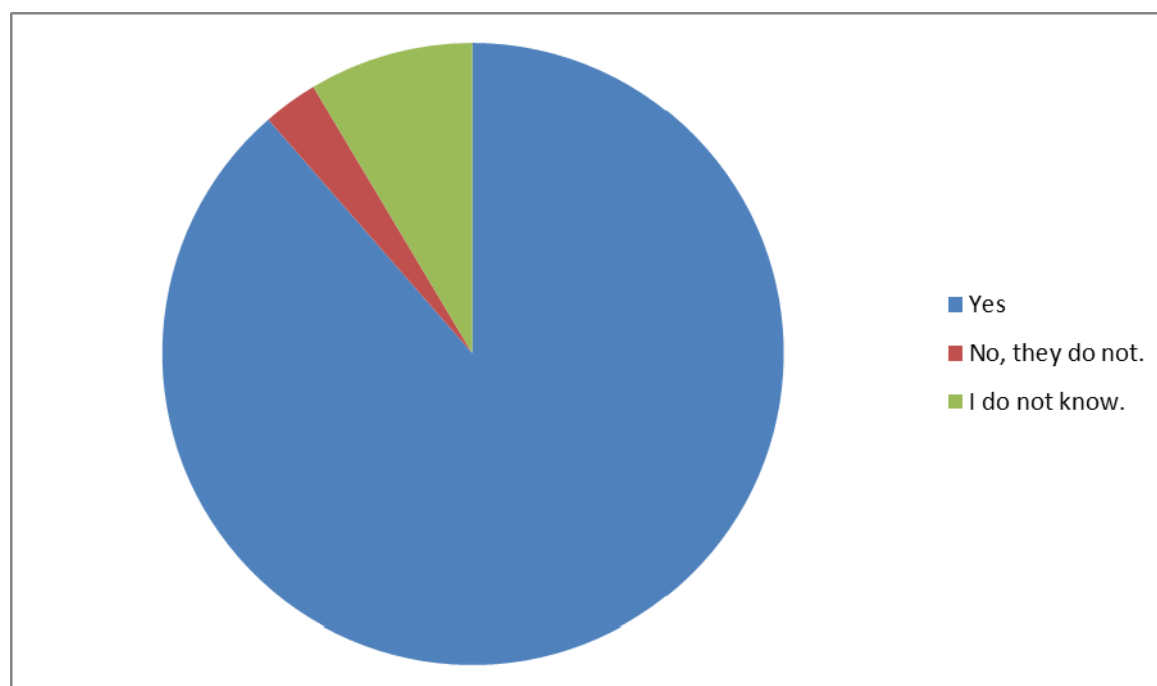
- Andorra: “University of Andorra and Government of Andorra have co-operation with some Higher Education Institutions in Spain, France, Belgium and UK, but they are not EU funded.”
- Belgium (FR): “No HEI from the French Community of Wallonia-Brussels has participated so far in a project funded through 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 Helenik 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 31 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 application? (Survey Question #8.1)



Of the respondents who answered this question in the affirmative, three said it was “to a great extent”, 19 “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:

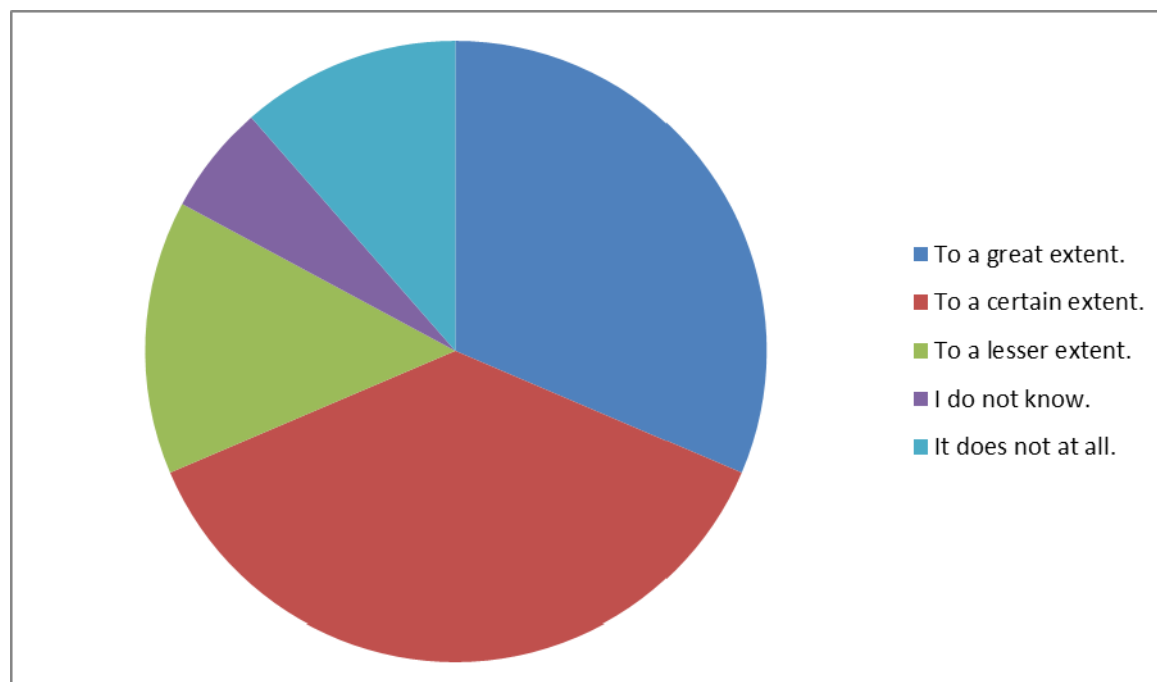
- Belgium (FR): “It concerns mainly the Erasmus programme as well as the Erasmus Mundus programme. However, so far, we haven’t been aware of HEIs employing staff to search and apply specifically for EU funded projects.”
- Hungary: “International offices and grant offices are now operating at almost all 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-four of the 35 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)



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

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.

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.

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?
 - ...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.

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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.

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...

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

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...
...
...

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?

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

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

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...
...

THANK YOU FOR YOUR KIND CO-OPERATION!