

# **International Trends in Mobility and Transnational Education**

**Dr Neil Kemp**  
**([neil.kemp@nkeducation.com](mailto:neil.kemp@nkeducation.com))**

**Senior Adviser (International), Institute of Education, University of  
London**



## **Some positive news .....**

- **Sustained economic growth in most key countries, particularly Asia**
- **Global demand for higher education and international education continues to increase**
- **International cooperation in research and teaching growing**



**but some growing concerns .....**

- decline in student recruitment from some countries**
- global competition increases**
- poor market intelligence**
- underinvestment in international education**
- poor integration of international activities –  
nationally and within institutions**

**USA is waking up .....**



## Major Factors impacting on Higher Education internationally:

- ✓ Extremely high growth in demand for HE places across Asia (eg 20% participation rate in India by 2020?)
- ✓ Participation rates steady Europe/N America (40 - 50%)
- ✓ Limits to government spend on HE
- ✓ Global trend in pricing of HE courses towards full costs of delivery



## Some Secondary Factors:

- Sustained economic growth in most countries
- GATS
- Bologna
- Demographic changes
- Increased demand for skilled migration
- New approaches to learning and delivery - technology convergence – ODL, Open Access, blended etc
- Nations prioritise international education for foreign policy/public diplomacy
- BUT ALSO .....
- increasing security concerns (visas ....)



# THE IMPACT!

- Growth in private sector involvement – in own right, in partnership with public providers
- Increasing opportunities for working internationally (links, networks, e-delivery, campuses etc)
- Increased international student mobility – recruitment opportunities
- Rapid competition growth both nationally and internationally – more want a share
- Growth in global networks and partnerships
- PG degrees/professional qualifications in greater demand
- Growth in research investment



## **Impact on Students:**

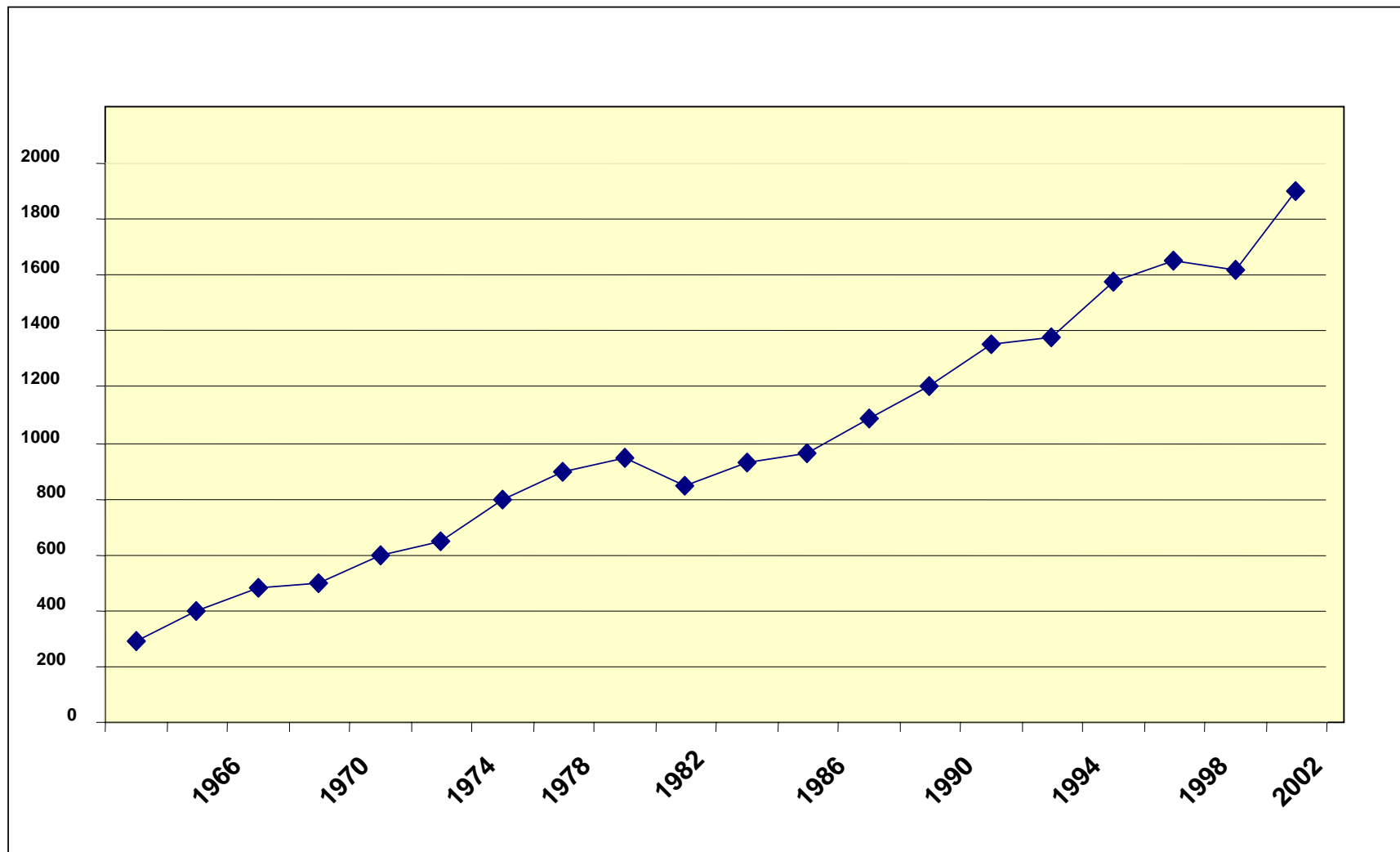
- **more choice (seek most cost-effective options)**
- **more information available**
- **more 'dubious' providers operating internationally**
- **more 'consumer confusion'**



# **The Global Market for International students**



## Overall Global Trend in HE Students Studying Outside their Home Country (OECD data)



# Predicted growth in future **demand** for international HE places:

(millions of student places)

|       | 2005 | 2010 | 2020 | %growth |
|-------|------|------|------|---------|
| World | 2.4  | 3.3  | 5.8  | 6.2%    |

from: *Vision 2020: Forecasting International Student Mobility (2004)*



## The Global Demand for International Student Places in HE in 5 destination countries by Student Source Regions ('000s)

|                    | 2003       | 2005         | 2010         | 2015         | 2020         | Growth*     |
|--------------------|------------|--------------|--------------|--------------|--------------|-------------|
| Africa             | 63         | 67           | 87           | 113          | 146          | 5.2%        |
| Middle East        | 37         | 39           | 49           | 60           | 73           | 4.2%        |
| <b>Asia</b>        | <b>528</b> | <b>612</b>   | <b>943</b>   | <b>1,347</b> | <b>1,862</b> | <b>7.8%</b> |
| Americas           | 127        | 134          | 156          | 181          | 209          | 3.0%        |
| Europe             | 226        | 235          | 262          | 289          | 313          | 2.0%        |
| <b>World Total</b> | <b>988</b> | <b>1,096</b> | <b>1,507</b> | <b>2,000</b> | <b>2,614</b> | <b>6.0%</b> |

\* Annual average

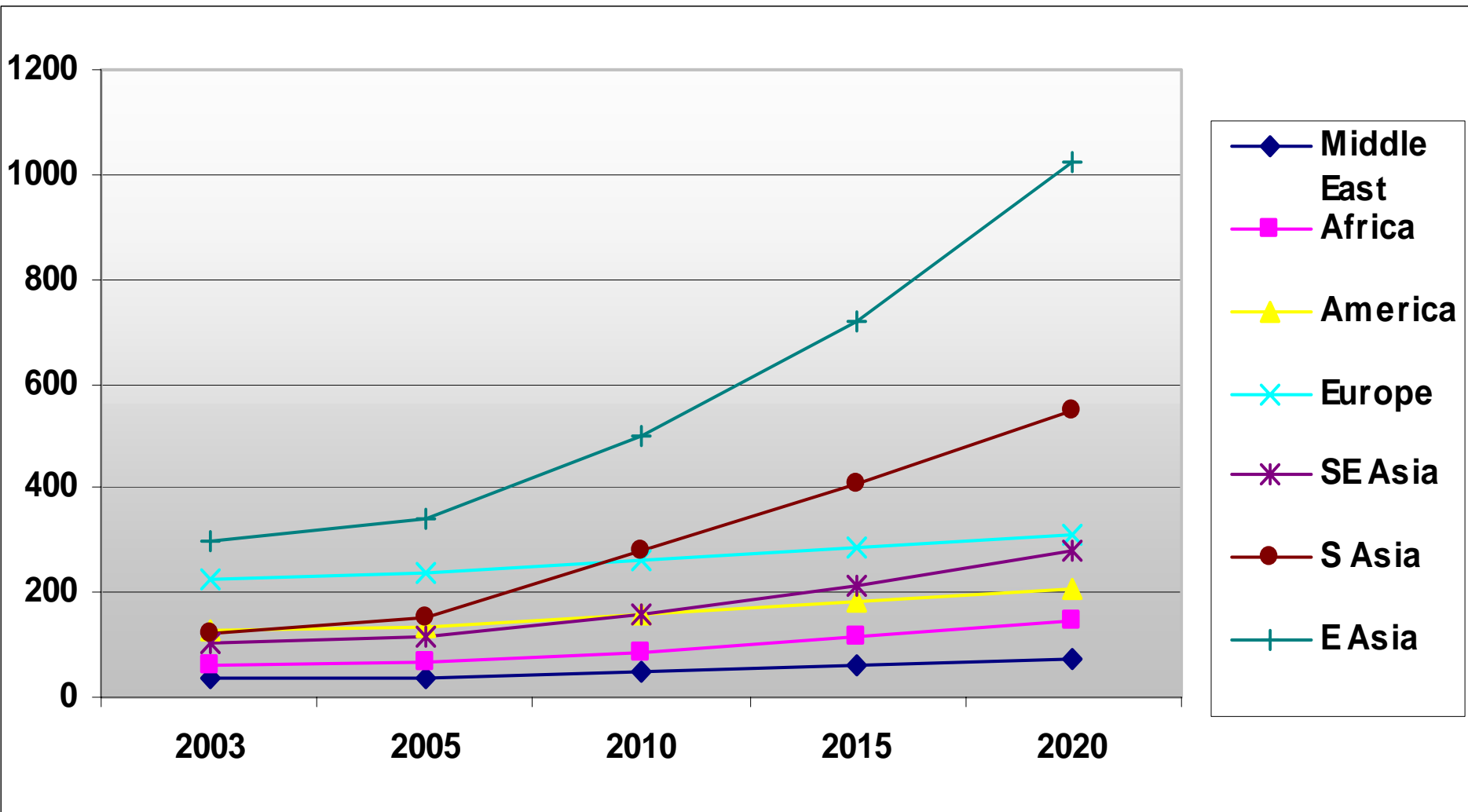


## Forecasts of Total Demand for International Student Places (‘000s) from Asia in 5 destination countries

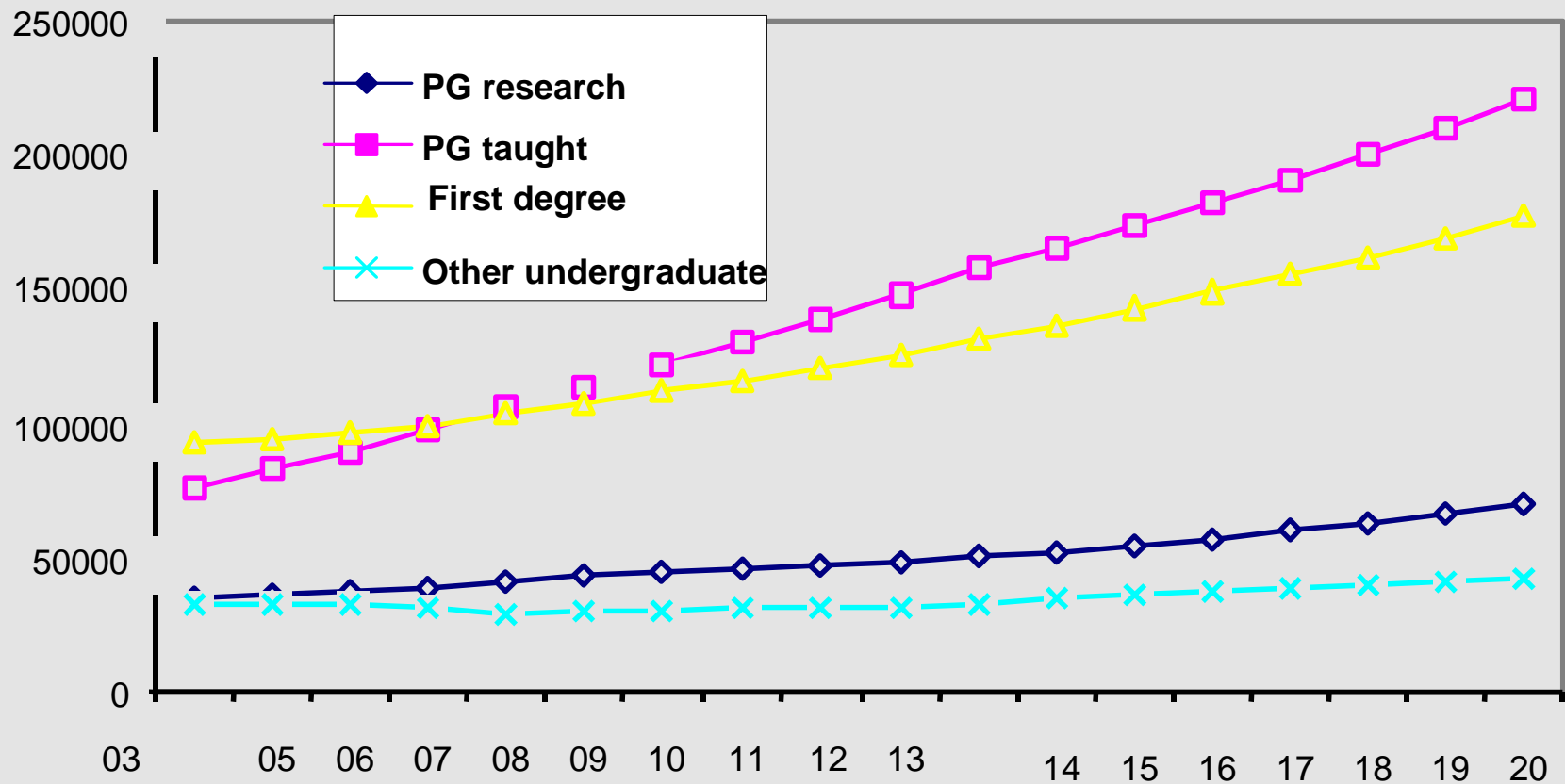
|            | 2003 | 2005 | 2010 | 2015  | 2020  | Growth* |
|------------|------|------|------|-------|-------|---------|
| Asia Total | 528  | 612  | 943  | 1,347 | 1,862 | 7.8%    |
| E Asia     | 299  | 343  | 498  | 719   | 1,026 | 7.6%    |
| SE Asia    | 105  | 114  | 158  | 216   | 281   | 6.2%    |
| S Asia     | 121  | 152  | 283  | 407   | 549   | 9.3%    |



## Projected demand for international student places in the UK – base scenario conditions



## Projected demand for international student places in the UK by level of study

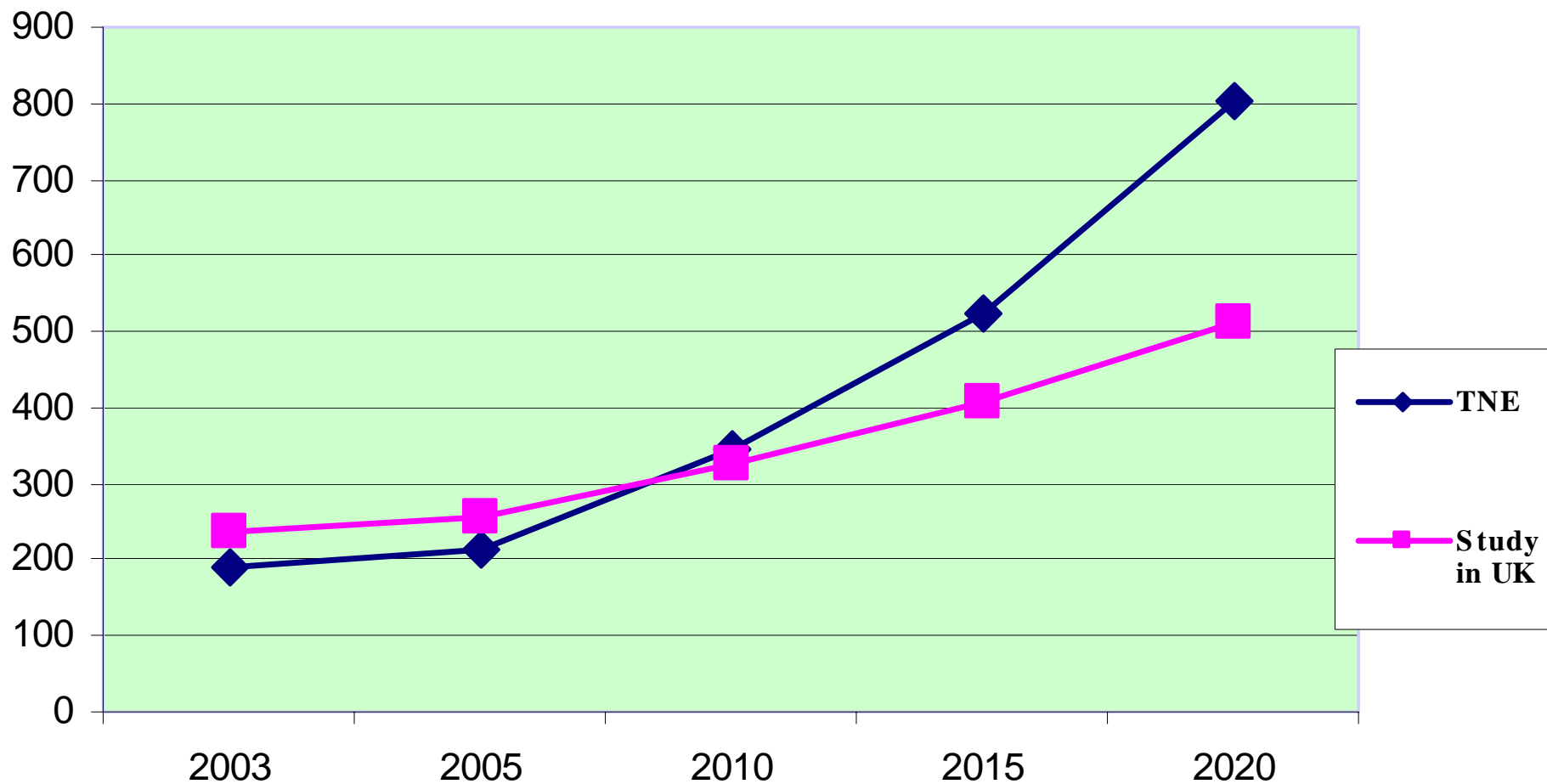


## **Trans National Education (TNE)**

- includes all forms of distance learning and international delivery**



## Comparison of projections of international student numbers studying in the UK and on UK HE programmes delivered overseas ('000s)



## Some trends in international student recruitment to all main destinations:

- Decline in several East Asia markets – particularly for ug students (market adjustment?)
- New growth in some rising stars – Nigeria, Pakistan + Bangladesh, Sri Lanka, Ghana, Kenya
- New EU states – very high growth
- North America and EU remain steady



## Nos of international students in HE institutions in lead destination countries

| Country     | Data Year | International HE Students |
|-------------|-----------|---------------------------|
| USA         | 2004      | 565,000                   |
| UK          | 2004      | 325,400                   |
| Germany     | 2003      | 240,620                   |
| France      | 2003      | 221,560                   |
| Australia   | 2003      | 136,250                   |
| China       | 2003      | 77,700                    |
| Canada      | 2003      | 71,650                    |
| Russia      | 2002      | 70,730                    |
| Japan       | 2000      | 59'600                    |
| Spain       | 2003      | 53,640                    |
| Malaysia    | 2003      | 27,730                    |
| New Zealand | 2003      | 26,360                    |
| Sweden      | 2003      | 25,520                    |
| Netherlands | 2003      | 20,500                    |



## How well is the UK Doing?

### Changes in Total International Student Enrolments in UK HE

|              | 2003-04       | 2004-05       | Growth     |
|--------------|---------------|---------------|------------|
| EU           | 104130        | 115230        | +11%       |
| Non-EU       | 221635        | 229105        | +3%        |
| <b>Total</b> | <b>325760</b> | <b>344335</b> | <b>+6%</b> |



# International Students in UK HE

|               | <b>PG<br/>Research</b> | <b>PG<br/>Taught</b> | <b>UG</b>     | <b>UG<br/>Other</b> | <b>Total</b>  |
|---------------|------------------------|----------------------|---------------|---------------------|---------------|
| <b>2004-5</b> | <b>45515</b>           | <b>121500</b>        | <b>125725</b> | <b>51600</b>        | <b>344335</b> |
| <b>2003-4</b> | <b>43260</b>           | <b>114635</b>        | <b>117220</b> | <b>50645</b>        | <b>325760</b> |
| <b>2002-4</b> | <b>42060</b>           | <b>102630</b>        | <b>109625</b> | <b>51080</b>        | <b>305395</b> |



## Total Numbers of International Students in UK HE Institutions by Country of Domicile

|           | 2003-04 | 2004-05 | Growth |
|-----------|---------|---------|--------|
| China     | 48175   | 52990   | 10%    |
| USA       | 19955   | 21435   | 7%     |
| Greece    | 22970   | 19815   | -14%   |
| India     | 14675   | 16725   | 14%    |
| Ireland   | 14740   | 16395   | 11%    |
| France    | 15600   | 15915   | 2%     |
| Germany   | 15325   | 15785   | 3%     |
| Malaysia  | 11860   | 11520   | -3%    |
| Hong Kong | 10660   | 10880   | 2%     |
| Spain     | 8820    | 8690    | -1%    |
| Nigeria   | 5955    | 8170    | 37%    |
| Japan     | 6860    | 6605    | -4%    |
| Italy     | 6675    | 6585    | -1%    |
| Pakistan  | 4395    | 6560    | 49%    |
| Taiwan    | 5765    | 5930    | 3%     |
| Cyprus    | 4220    | 5700    | 35%    |
| Canada    | 4440    | 4790    | 8%     |



## NEW International Student Enrolments for UK HE (Non-EU)

|           | 2002-3 | 2003-4 | 2004-5 | % annual<br>change |
|-----------|--------|--------|--------|--------------------|
| China     | 25060  | 30240  | 28885  | -4%                |
| USA       | 14125  | 14785  | 15705  | 6%                 |
| India     | 8345   | 8290   | 9335   | 13%                |
| Malaysia  | 5825   | 6095   | 5500   | -10%               |
| Nigeria   | 2665   | 3265   | 4795   | 47%                |
| Hong Kong | 4665   | 4830   | 4615   | -4%                |
| Pakistan  | 1795   | 2835   | 4120   | 45%                |
| Japan     | 3560   | 3770   | 3510   | -7%                |
| Taiwan    | 3100   | 3160   | 3295   | 4%                 |
| Canada    | 2295   | 2500   | 2720   | 9%                 |
| Thailand  | 1780   | 1990   | 2045   | 3%                 |
| S Korea   | 1500   | 1820   | 2020   | 11%                |
| Norway    | 1885   | 1980   | 1750   | -12%               |
| Ghana     | 1290   | 1635   | 1605   | -2%                |
| Singapore | 1640   | 1555   | 1355   | -13%               |
| Australia | 955    | 1060   | 1160   | 9%                 |
| Sri Lanka | 925    | 1065   | 1150   | 8%                 |



## New Enrolments for International Students in UK HE - EU

|             | 2002-03 | 2003-04 | 2004-05 | <i><b>Growth</b></i> |
|-------------|---------|---------|---------|----------------------|
| France      | 10405   | 10995   | 11165   | <i><b>2%</b></i>     |
| Germany     | 9005    | 9220    | 9565    | <i><b>4%</b></i>     |
| Greece      | 11065   | 9730    | 8505    | <i><b>-13%</b></i>   |
| Ireland     | 6050    | 7155    | 8070    | <i><b>13%</b></i>    |
| Spain       | 6065    | 6035    | 5925    | <i><b>-2%</b></i>    |
| Italy       | 4085    | 3745    | 3610    | <i><b>-4%</b></i>    |
| Cyprus      | 1685    | 1865    | 3340    | <i><b>79%</b></i>    |
| Poland      | 685     | 875     | 2075    | <i><b>137%</b></i>   |
| Sweden      | 2065    | 1950    | 2040    | <i><b>5%</b></i>     |
| Netherlands | 1710    | 1625    | 1620    | <i><b>0%</b></i>     |
| Portugal    | 1210    | 1260    | 1345    | <i><b>7%</b></i>     |
| Belgium     | 1325    | 1350    | 1245    | <i><b>-8%</b></i>    |
| Finland     | 1350    | 1255    | 1180    | <i><b>-6%</b></i>    |
| Denmark     | 1270    | 1170    | 1075    | <i><b>-8%</b></i>    |



## Some Rising Stars for the UK .....

| Nigeria |     |      |      |          |       |
|---------|-----|------|------|----------|-------|
|         | PGR | PGT  | UG   | Other UG | Total |
| 2004-5  | 580 | 3990 | 2970 | 630      | 8170  |
| 2003-4  | 470 | 2800 | 2210 | 475      | 5955  |
| 2002-3  | 390 | 2135 | 1775 | 385      | 4680  |

| Pakistan |     |      |      |     |       |
|----------|-----|------|------|-----|-------|
|          | PGR | PGT  | UG   | OUG | Total |
| 2004-5   | 595 | 3555 | 2045 | 365 | 6560  |
| 2003-4   | 490 | 2195 | 1475 | 235 | 4395  |
| 2002-3   | 425 | 1625 | 1055 | 140 | 3245  |



# Germany – a success story?



## Germany compared to UK: Main Source Countries for international students

| UK (2004) |       | Germany (2004) |       |
|-----------|-------|----------------|-------|
| COUNTRY   | TOTAL | COUNTRY        | TOTAL |
| China     | 48175 | China          | 25284 |
| Greece    | 22970 | Turkey         | 24448 |
| USA       | 19955 | Poland         | 14350 |
| Germany   | 15325 | Bulgaria       | 12048 |
| France    | 15600 | Russia         | 10814 |
| Irish Rep | 14740 | Morocco        | 8097  |
| India     | 14675 | Ukraine        | 7238  |
| Malaysia  | 11860 | Italy          | 7183  |
| Hong Kong | 10660 | Greece         | 7043  |
| Spain     | 8820  | France         | 6431  |
| Japan     | 6860  | Austria        | 6373  |
| Italy     | 6675  | Spain          | 5739  |



**USA: can they reverse the recent declines?**



# USA: Total International Students by Main Source Countries

|           |                  | 2003/04       | 2004/05       | % Change     |
|-----------|------------------|---------------|---------------|--------------|
|           | <b>Total</b>     | <b>572509</b> | <b>565039</b> | <b>-1.3</b>  |
| <b>1</b>  | <b>India</b>     | <b>79736</b>  | <b>80466</b>  | <b>0.9</b>   |
| <b>2</b>  | <b>China</b>     | <b>61765</b>  | <b>62523</b>  | <b>1.2</b>   |
| <b>3</b>  | <b>Korea</b>     | <b>52484</b>  | <b>53358</b>  | <b>1.7</b>   |
| <b>4</b>  | <b>Japan</b>     | <b>40835</b>  | <b>42215</b>  | <b>3.4</b>   |
| <b>5</b>  | <b>Canada</b>    | <b>27017</b>  | <b>28140</b>  | <b>4.2</b>   |
| <b>6</b>  | <b>Taiwan</b>    | <b>26178</b>  | <b>25914</b>  | <b>-1.0</b>  |
| <b>7</b>  | <b>Mexico</b>    | <b>13329</b>  | <b>13063</b>  | <b>-2.0</b>  |
| <b>8</b>  | <b>Turkey</b>    | <b>11398</b>  | <b>12474</b>  | <b>9.4</b>   |
| <b>9</b>  | <b>Germany</b>   | <b>8745</b>   | <b>8640</b>   | <b>-1.2</b>  |
| <b>10</b> | <b>Thailand</b>  | <b>8937</b>   | <b>8637</b>   | <b>-3.4</b>  |
| <b>11</b> | <b>UK</b>        | <b>8439</b>   | <b>8236</b>   | <b>-2.4</b>  |
| <b>12</b> | <b>Indonesia</b> | <b>8880</b>   | <b>7760</b>   | <b>-12.6</b> |
| <b>13</b> | <b>Colombia</b>  | <b>7533</b>   | <b>7334</b>   | <b>-2.6</b>  |
| <b>14</b> | <b>Brazil</b>    | <b>7799</b>   | <b>7244</b>   | <b>-7.1</b>  |



# Australia: Limits to Growth?





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**Australia: *NEW***  
**Enrolments of**  
**International**  
**Students in HE**  
**Institutions by**  
**Main Source**  
**Countries**

|                       | 2004  | 2005  | % change |
|-----------------------|-------|-------|----------|
| Total (all countries) | 63704 | 64057 | 0.6      |
| China                 | 14733 | 18210 | 23.6     |
| India                 | 9339  | 8445  | -9.6     |
| Malaysia              | 5855  | 5354  | -8.6     |
| Hong Kong             | 3640  | 3238  | -11.0    |
| Indonesia             | 3630  | 3188  | -12.2    |
| Singapore             | 3181  | 2912  | -8.5     |
| Korea                 | 2125  | 2125  | 0.0      |
| Thailand              | 2487  | 2073  | -16.6    |
| Taiwan                | 1699  | 1511  | -11.1    |
| Japan                 | 1489  | 1437  | -3.5     |
| Canada                | 1222  | 1345  | 10.1     |
| Bangladesh            | 1377  | 1277  | -7.3     |
| United States         | 1225  | 1207  | -1.5     |
| Viet Nam              | 851   | 923   | 8.5      |
| Sri Lanka             | 717   | 822   | 14.6     |




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*Last updated: 15 July 2004*

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# **International education developments in some Asian countries**



# Asian Countries – Some Trends and Policies

|                                      |   |
|--------------------------------------|---|
| ■ <b>The Giants:</b>                 | India, China ... Pakistan,<br>Bangladesh  |
| ■ <b>More Mature Markets</b>         | Japan, (S. Korea)                         |
| ■ <b>‘Internationalising’ Tigers</b> | Singapore, Malaysia,<br>China (Hong Kong) |
| ■ <b>Rapidly Modernising</b>         | Thailand, Taiwan, Sri Lanka               |
| ■ <b>Tomorrow’s Stars</b>            | Vietnam, Indonesia,<br>Philippines        |



# Japan

- Demographic changes very pronounced
- Japanese public and private universities competing with international due to over-supply of places
- Continuing demand for wide variety of overseas study opportunities
- Few foreign providers setting up in Japan – Oxford?
- National policies to recruit international students



# International Students In Japan

| Source Country | 2001          | 2002          | 2003           | 2004           | 2005           |
|----------------|---------------|---------------|----------------|----------------|----------------|
| <b>Total</b>   | <b>78,812</b> | <b>95,550</b> | <b>109,508</b> | <b>117,302</b> | <b>121,812</b> |
| China          | 44,014        | 58,533        | 70,814         | 77,713         | 80,592         |
| Taiwan         | 4,252         | 4,266         | 4,235          | 4,096          | 4,134          |
| Korea          | 14,725        | 15,846        | 15,871         | 15,533         | 15,606         |
| Malaysia       | 1,803         | 1,885         | 2,002          | 2,010          | 2,114          |
| USA            | 1,141         | 1,217         | 1,310          | 1,456          | 1,646          |
| Thailand       | 1,411         | 1,504         | 1,641          | 1,665          | 1,734          |
| Indonesia      | 1,388         | 1,441         | 1,479          | 1,451          | 1,488          |
| Philippines    | 490           | 483           | 508            | 525            | 544            |
| Brazil         | 342           | 347           | 353            | 330            | 338            |
| Bangladesh     | 805           | 823           | 974            | 1,126          | 1,331          |
| Others         | 8,441         | 9,205         | 10,321         | 3,331          | 3,461          |



# **MALAYSIA: Policies and other factors impacting on international education**

- **Economy booming – oil, gas, electronics etc**
- **Government seeking to diversify exports: prioritises ‘knowledge’**
- **Relative high level of state and private investment in education**
- **Positive discrimination policies; limited access to state` provision by some ethnic groups**
- **Government ‘Privatisation’ policies applied to HE**
- **Government encouraging:**
  - **reputable foreign providers to set up**
  - **recruitment from many nations – particularly Mid-East**



# Malaysia: Impact

- Large numbers of foreign providers (US, Australia, UK, India) delivering in collaboration with local private colleges
  - Some foreign Campuses eg Nottingham University in KL
  - Significant non-Malaysian recruitment eg Westminster College (part of London School of Commerce) with over 40 nationalities enrolled
- BUT** recent reports indicate foreign student recruitment declined



# **Singapore:**

## **Policies impacting on international education**

- **High Value Added Services – only 3 m inhabitants**
- **Government prioritising ‘knowledge’ areas**
- **High investment in biosciences research – seeking international cooperation**
- **Government encouraging:**
  - **‘reputable’ foreign providers to set up campuses**
  - **greater cooperation between foreign and Singaporean institutions**
- **International student recruitment (target 150,000)**



# Singapore: Impact

- Foreign campuses growing – but slow to start (INSEAD, USA, Australia, UK – possibly!)
- Local delivery of foreign programmes mainly with Singapore private sector colleges
- Some foreign joint programmes with state universities (eg NUS with Imperial College, London; IIM Bangalore etc)
- BUT can Singapore attract more than just the Chinese Diaspora in SE/E Asia? Are the terms for foreign campuses sufficiently attractive?



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## International Students

### Undergraduate Studies

The Nanyang Technological University recruits international undergraduates from countries like Malaysia, Indonesia, Vietnam, India, Hong Kong, China and Mauritius. Students can look forward to experiencing a rich tapestry of intellectual and cultural exchanges on the campus.

International students interested in pursuing [undergraduate studies](#) in the university must have completed at least 12 years of general education in order to be considered for admission. Application for admission opens from October to March.

### Graduate Studies

Nanyang Technological University offers graduate programmes leading to the award of the degrees of Master and Doctor of Philosophy as well as postgraduate diplomas. There are two types of graduate degree programmes - by [research](#) and by [coursework and dissertation](#).

- [Cost of Living](#)
- [Graduate Accommodation](#)
- [Group Hospital & Surgical Insurance \(GHSI\) Scheme](#)
- [Part-Time Employment](#)
- [Immigration Matters](#)
  - [Student's Pass \(International Undergraduates\)](#)
  - [Student's Pass \(International Graduate / Exchange Students\)](#)
  - [Social Visit Pass for Spouse \(International Graduate Students\)](#)

### Exchange Programme

The [International Student Exchange Programme \(INSTEP\)](#) enables students to study overseas for a semester or an academic year in leading [overseas universities](#) around the world while pursuing their studies in NTU.



# India: Higher education

- >10million students enrolled (3m in private sector)
- >18,000 institutions (±15,000 private)
- Private investment in education >3 times government investment
- Teaching focus of institutions – lack research investment
- Mixed quality (eg IITs, IIM, JNU, TIFR all very high but .....)
- Some new research investments at elite centres eg CCMB, Hyderabad
- Global outreach: NIIT, IIMB etc
- International students in India: 7,800 (mainly Asian)
- Indian students studying overseas: >120,000



## India: A few emerging problems in HE

- need to provide at least 2m extra HE places by 2008 - and possibly 20m by 2020
- government funding for education very limited: necessarily prioritises basic education and literacy
- ambivalence to private sector with no regulatory framework
- charging fees in public sector institutions – political issue
- reservation of places for scheduled castes and tribes
- no satisfactory quality framework for state and private
- growth of very large state universities eg Delhi and Kolkata



**An example of the Competition**

**..... the USA and India!**



## **Indian Students in USA**

**Total number: 79,000 of whom 79% (63,000) are at graduate level (mainly PhD)**

### **Sources of funding for studies in the USA:**

**75% of Indian PhD students receive funding from the US institution**

### **for comparison Indian Students in the UK**

**Total number: 15,000 of whom about 10% on PhD programmes**

**40% Indian PhD students receive funding from UK sources**



## **Graduates and Skilled Migration: USA**

**‘.....proportion of foreign born faculty with U.S. doctoral degrees at US Universities has gone up sharply during the past three decades to 20.4 percent in 1999. For engineering it rose from 18.6 percent to 34.7 percent in the same period.....’**



## Graduates and Skilled Migration: USA

**‘..... a ten-percent increase in the number of foreign graduate students would raise patent applications by 3.3 percent, university patent grants by 6.0 percent and non-university patent grants by 4.0 percent. However, enrollments of US graduate students have no detectable effect.’**

*G. Chellaraj, K. E. Maskus, A. Mattoo*  
*September 14, 2004*

*World Bank-University of Colorado Research Paper*

**..... but how should European countries and universities respond?**



## Europe ... some thoughts on strategies -

- Grow quality non-EU student recruitment ..... BUT
  - remember there are limits to growth
  - greater flexibility to meet changing international demands and operating environment
- Grow programmes delivered globally (TNE)
- Seek research cooperation opportunities
- Internationalise at all levels
- International strategy is not short term student recruitment
  - think across all activities and for longer term
- Invest to achieve – business plan

..... but how best to change international misperceptions of Europe's institutions!



# **A few thoughts from a friendly foreigner on German international HE – and from a market perspective.....**

- **Student Fees – where do you stand? Will you introduce, if so when and what might be a strategy?**
- **English language and programme delivery**
- **Research as a priority?**
- **TNE: development of cost-effective models**
- **Diversification of country base for student recruitment**
- **International misperceptions of German universities**



# In Summary and Looking towards 2020

- **International student mobility will continue to grow – but**
  - **limits to growth**
  - **demand patterns different – countries, level, subjects**
- **More competitors fishing in the same pools – for students, for researchers, for staff, for TNE etc**
- **Demand for HE places globally will increase markedly – particularly from developing countries**
- **New Asian and African institutions will not look like the traditional European/North American universities**
- **Modes and approaches to delivery will change**



**universities' dilemma .....**

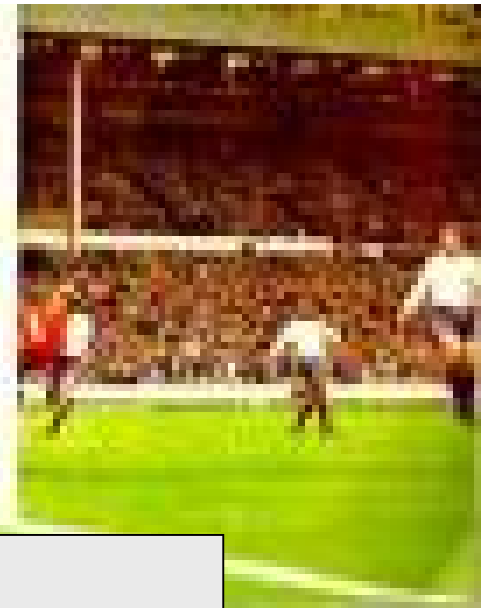
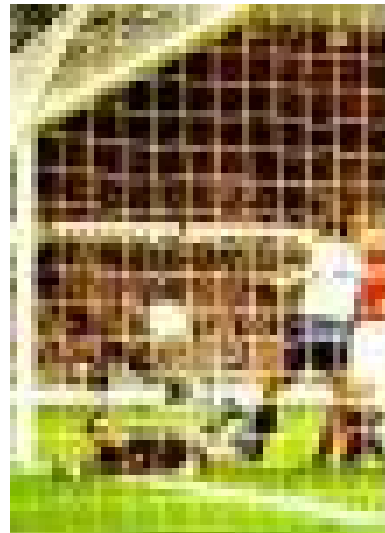
**..... do you want to go global or remain national?**



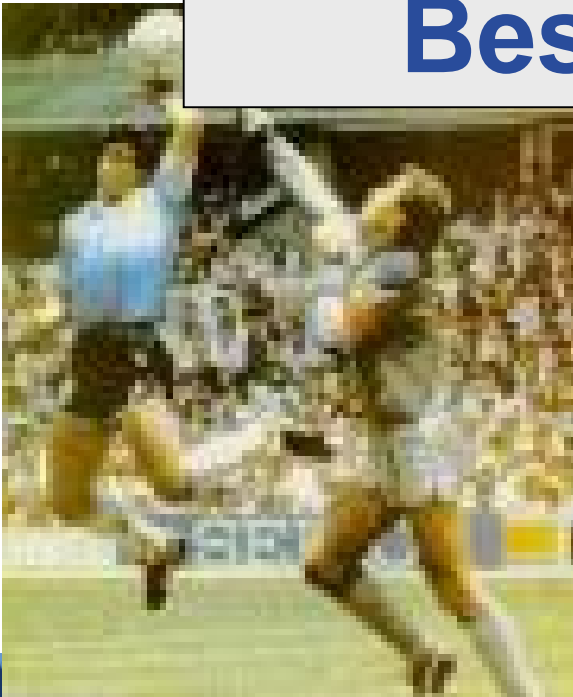
# **A New Market for Germany?**

**Argentina .....**





**Best of Luck!!!**



# Many thanks!

Dr Neil Kemp

([neil.kemp@nkeducation.com](mailto:neil.kemp@nkeducation.com))

# **An Integrated International Strategy, including for Student Recruitment**

- **Improved market intelligence and understanding of competition**
- **Prioritisation**
- **Differentiation**
- **Programmes, research etc relate to identified market needs**
- **Efficiency of processes – benchmarking or performance measures**



## **Audit institutions international activities and experience by country/level/subject:**

- **Research and teaching collaboration**
- **Recruitment of staff and researchers**
- **International student recruitment**
- **Student and staff exchanges**
- **TNE – overseas delivered programmes**
- **Country/regional specialisations, language specialisation**
- **Staff visits**
- **Scholarships**
- **Alumni**
- **Other contacts**

**Exploit synergies – build on knowledge, expertise and contacts**

