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OPPORTUNITIES IN MEXICO: EDUCATIONAL SERVICES




 Department of Foreign Affairs and International Trade

 Ministère des Affaires étrangères et du Commerce international

Latin America & Caribbean Branch



M A R K E T P R O F I L E - M E X I C O

Market Profile – Mexico

Opportunities in Mexico: Educational Services was developed jointly by the Department of Foreign Affairs and International Trade (DFAIT) and Prospectus Inc. This market profile was made possible through the support of the Toronto office of Baker & McKenzie.

This market profile is designed to provide an overview of the market for educational services in Mexico. Although efforts have been made to avoid errors and inaccuracies in this document, it is not intended to be used as the only source of market information on this sector. We encourage the reader to use this publication as one of several resources for commercial dealings with Mexico.

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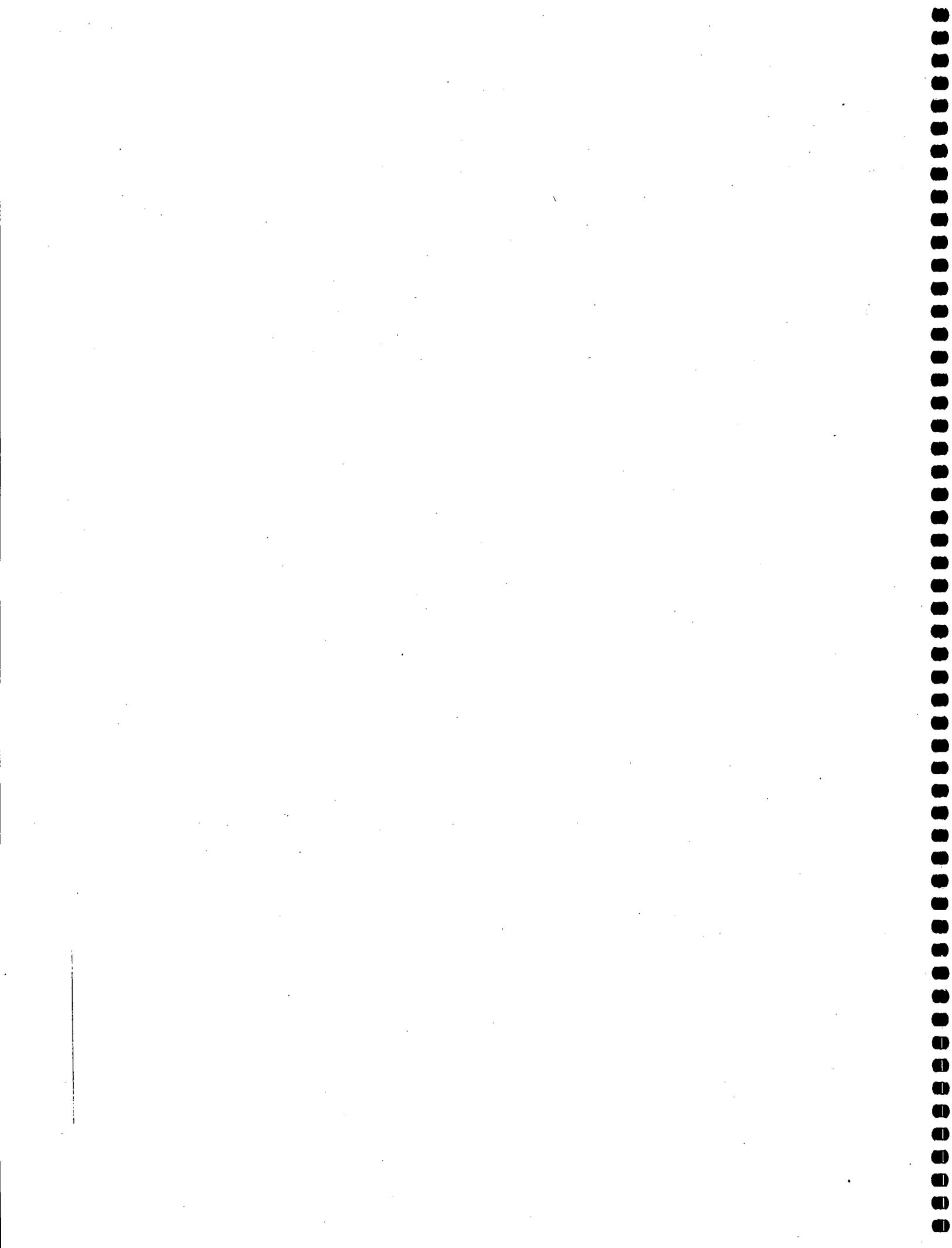
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FROM BAKER & MCKENZIE, BARRISTERS & SOLICITORS

With more than fifty offices in 27 countries, Baker & McKenzie is the largest law firm in the world. In Mexico, the firm has had a very significant presence since 1961. In Mexico City, the firm operates locally under the name *Bufete Sepulveda* and in all other locations in Mexico the firm is known as Baker & McKenzie. The firm currently has offices in the cities of Juárez, Mexico City, Monterrey, and Tijuana, with expansion plans to the other growing industrial regions in Mexico. A substantial percentage of all foreign companies establishing operations in the *maquiladora* regions have retained the services of Baker & McKenzie to assist them in all aspects of their endeavours in this regard.

The lawyers in the firm combine expertise in Mexican law with an understanding of the business environment and governmental process in Mexico. The firm enjoys an excellent reputation in business and government circles as one of the leading Mexican firms dealing with international and domestic business transactions. The lawyers from the four Mexican offices regularly meet with their Canadian counterparts to discuss coordination of business activities in the North American context and to encourage trade and investment activities between Canada and Mexico. Partners from the Mexican offices serve on a number of domestic and international bodies as representatives of both national business organizations and the Mexican government. Partners from the Mexican offices regularly advise the Mexican government on international business matters including the recent NAFTA negotiations.

The Toronto office, in existence since 1962, is an integral part of the North American practice of the firm which includes nine offices in the United States and four in Mexico.

The areas of the firm's expertise in Canada and Mexico include:

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The Baker & McKenzie offices in Canada and Mexico work to assist Canadian companies to find the right partner to enable them to establish or expand business activities in Mexico. Whether a company's objective is to raise capital, establish a joint venture or strategic alliance, or begin exporting to the Mexican market, Baker & McKenzie offers a coordinated approach to ably facilitate entry to the Mexican market.



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Mexico



THE NORTH AMERICAN FREE TRADE AGREEMENT (NAFTA)

The NAFTA expands Canada's free-trade area of 270 million people into a market of 360 million — a market larger than the population of the 15 countries of the European Union and one with a total North American output of \$7 trillion.

Mexico is Canada's most important trading partner in Latin America. Two-way merchandise trade with Mexico exceeded \$5.5 billion in 1994 and is expected to exceed \$7 billion by the end of the decade.

Canadian direct investment in Mexico is growing rapidly, increasing from \$452 million in 1992 to over \$1.2 billion in 1994.

This guide has been prepared with the problems inherent to the new exporter in mind. However, it is not exhaustive. The differing circumstances, interests and needs of individual companies will influence their strategies for the Mexican market.

Further assistance can be obtained by addressing requests to the International Trade Centres (see Where To Get Help) or contact the InfoCentre at:

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Fax: (613) 996-9709

FaxLink: (613) 944-4500

InfoCentre Bulletin Board (IBB):

1-800-628-1581 or (613) 944-1581

Internet: <http://www.dfait-macci.gc.ca>

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MEXICO'S SKILLS CRISIS

Mexico faces a major educational crisis caused by a rapidly-growing labour force and massive industrial restructuring, combined with a severe shortage of resources.

Mexico's population of about 100 million is growing at the rate of more than 2 percent per year. Half of the Mexican population is under 20 years old, and almost three-quarters is under 30. The labour force of more than 31 million workers is growing even faster than the population. Mexico has also become highly urbanized as the population has gradually moved into the cities to participate in the industrial economy. Mexico will match the 70 percent urbanization rate of the United States by the turn of the century. Mexico City is already home to about one-quarter of the total population.

These demographic trends would create an immense need for both general education and job skills training even under normal circumstances. But the economic environment in Mexico today can hardly be described as normal. In the late 1980s, the Mexican government abandoned decades of protectionist policies and implemented a series of sweeping economic reforms. They included radically new policies of trade liberalization, privatization and deregulation.

These reforms brought about a massive restructuring of Mexican industry, as producers scrambled to modernize to meet the influx of foreign competition. Small family businesses that traditionally dominated the economy have disappeared in the wake of mergers and corporate takeovers. This rationalization process has disrupted many traditional lines of supply, which were often based more on personal friendships than on performance. At the same time, the government has shifted resources to modernize the nation's dilapidated infrastructure, so that Mexico can take advantage of new export opportunities.

The implementation of the North American Free Trade Agreement (NAFTA) on January 1, 1994 and the subsequent devaluation of the peso in December of that year, combined to accelerate this restructuring process. Mexico's exports surged by about one-third in 1995 alone. But only the most efficient Mexican manufacturers can meet the standards of quality, consistency and service demanded in foreign buyers.

These trends have multiplied the demand for skills and overtaxed Mexico's underdeveloped education and training institutions. The needs of employers are becoming a more important force driving the public education system. Most employers are also expanding their own training efforts, often using outside assistance. At the same time, individuals are advancing their own career prospects through privately-delivered adult education programs as well as enrollment in foreign universities.

The growing demand for education and training has led to increased allocation of government resources to education. The *Solidaridad* program, for example, has built thousands of new school facilities. This program also provides scholarships, food rations and medical care as a means of reducing the school drop-out rate. Under the *Acuerdo Nacional para la Modernización de la Educación Básica*, National Agreement to Modernize Basic Education, funding is expected to increase by 70 percent over four years.

These trends have created substantial opportunities for Canadian suppliers of education and training services. Mexico's needs encompass the full range of education services, from pre-school programs to advanced degrees and continuing adult education. The system has become so badly over-burdened that a quality education is often available only to those who can afford to attend private Mexican schools or to travel abroad. Canadian education and training institutions are well-qualified to help Mexico provide this badly needed education. The opportunities are considerable, given that close to 250,000 students study in private Mexican universities, which are similar in cost to Canadian universities. So far, Canada has captured only about 1 percent of this potential market.

The benefits of educational exchanges with Mexico go beyond the obvious exports of services involved. Studying in Canada or in a Canadian program in Mexico gives Mexican students exposure to Canadian technology and expertise. It also builds contacts and knowledge of Canadian suppliers. Mexicans who pursue advanced degrees or technical training are especially likely to end up as key decision makers. The benefits of their familiarity with Canada and its capabilities are an intangible — but substantial — outcome of increased exports of educational services.

THE MEXICAN EDUCATION SYSTEM

Advanced education and specialized technical training are much in demand, but for the most part, they are accessible only to relatively wealthy Mexicans.

Mexico has a relatively small education system when compared to its overall population. As in Canada, education and training are seen as essential for career advancement. But for the most part, an advanced education is a luxury enjoyed only by the most affluent Mexicans.

Mexico's low per capita income, combined with a concentration of income and wealth in the hands of a relatively small segment of the population, have profound effects on the education system. On the basis of purchasing power parities, a 1991 United Nations study estimated Mexico's per capita gross domestic product (GDP) at US \$5,323 compared with US \$19,851 and \$17,681 for the United States and Canada respectively. On an exchange rate basis, the gap is much larger. According to the Organization for Economic Cooperation and Development (OECD) estimates, the ratio of income of the highest and lowest quintiles in the income distribution is almost 14 for Mexico, compared with about 9 for the United States and 7 for Canada. In 1992, the top 20 percent of Mexican households received 54 percent of total income.

Mexico's system of free public education extends to the high school level. Under the *Solidaridad* program, the government has greatly increased spending on social development, including education. Spending on public education was 5.2 percent of GDP in 1993, and is projected to increase to 8 percent by 2000. In spite of these efforts, drop-out rates are extremely high. At the national level, only 61 percent of students entering primary school complete the sixth year. There is great regional disparity: according to official government data, the primary school completion rate in 1993 to 1994 was 85 percent for the Federal District but only 34 percent in the state of Chiapas.

The government of President Ernesto Zedillo has recognized the need to greatly improve access to the nation's basic education system. The *Programa de Desarrollo Educativo*, Program for Educational Development, for the years 1995 to 2000 was made public in January 1996. The program calls for the enrollment of an additional 600,000 preschool students, even though the population in that age group is not expected to increase over the period. The program also acknowledges the need to increase the primary school completion rate and to absorb one million new secondary students into the school system. Meanwhile, higher education enrollment is projected to rise by 700,000. The increased use of electronic delivery systems including audiovisual aids and distance education is seen as a key tool for improving the quality of the educational system.

STUDENTS REGISTERED FOR THE 1994-95 SCHOOL YEAR THOUSANDS

Preschool	3,093
Primary	14,574
Junior high	4,493
Job training	428
Technical training	407
High school	1,936
Teaching studies	137
Undergraduate university	1,217
Postgraduate university	66
Total	26,351

Source: *Secretaría de Educación Pública (SEP)*, Secretariat of Public Education.

Educational institutions in Mexico are classified as federal, state, autonomous or private. Autonomous schools are public institutions with discretionary spending authority. In 1991 to 1992, there were a total of 166,392 schools, of which 70.5 percent were federal, 19.3 percent were state and autonomous, and 10.2 percent were private.

The market for educational services can be divided into four subsectors:

- the public and private school systems
- higher education institutions
- personal skills training
- industrial skills training

THE PUBLIC AND PRIVATE SCHOOL SYSTEMS

More than three-quarters of students enrolled up to the secondary school level attend state institutions. The rest are enrolled in federal, autonomous or private schools. There are no autonomous primary or junior high schools.

Mexico's system of school levels is similar to Canada's. The system includes preschool, primary, junior high and high schools. In addition there are vocational schools known as *capacitación para el trabajo* and technical schools called *profesional medio*.

Federal schools are controlled by the *Secretaría de Educación Pública (SEP)*, Secretariat of Public Education. All public schools are free and secular. Primary education has long been mandatory in Mexico, and text books are provided free. Private primary schools must use the same books but many supplement their curricula with other materials. A recent constitutional change makes attendance mandatory for junior high school students. Only about 20 percent of Mexicans complete high school.

Many private schools belong to the *Asociación Nacional d'Escuelas Particulares (ANEP)*, National Association of Private Schools. They cater mainly to affluent Mexicans.

REGISTERED SCHOOL STUDENTS BY TYPE OF INSTITUTION, 1992-93

	Federal	State	Autonomous	Private	Total
Preschool	248,526	1,795,009	568,520	246,835	2,858,890
Primary	973,477	12,529,501	0	922,691	14,425,669
Junior high	443,571	3,414,243	0	343,093	4,200,907
Technical school (<i>profesional medio</i>)	220,023	30,176	33,490	126,516	410,205
Job training (<i>capacitación para el trabajo</i>)	117,172	30,747	11,489	243,155	402,563
High school	604,451	428,524	347,416	386,629	1,767,020
Higher education	203,051	159,062	587,030	246,503	1,195,646
Totals	2,810,271	18,387,262	1,547,945	2,515,422	25,260,900

Source: *Secretaría de Educación Pública (SEP)*, Secretariat of Public Education.

HIGHER EDUCATION INSTITUTIONS

Public universities, teachers' colleges and technical institutes are the primary source of higher education in Mexico. They account for 79 percent of all registered higher education students. The rest attend private institutions.

Almost half of all students pursuing higher education attend autonomous public institutions. About one-third are enrolled at federal and state institutions. The difference between the two is the level of financial independence. State institutions must prepare detailed budget requests and ask for funds from the federal or state government each year. Autonomous institutions receive regular financial allocations and they are free to spend it according to their own priorities.

About 21 percent of higher education enrollment is in private institutions. These tend to be the most prestigious universities. They have extensive libraries, databases and other teaching resources. They are also much more expensive, and are generally accessible only to students from high-income families.

UNIVERSITY TUITION

There is no established uniform cost for attending a public university, but fees are generally nominal. They range from almost nothing at the *Universidad Nacional Autónoma de México (UNAM)*, National Autonomous University of Mexico, to about \$400 mexican pesos per year at the *Universidad Autónoma Metropolitana (UAM)*, Autonomous University of Mexico City. Proposals to implement cost-recovery fees at *UNAM* led to a strike by the University Student Council. Fees for foreign students range from \$5 mexican pesos per year at *UNAM* to about \$800 mexican pesos per year at *UAM*, although they can run up to US \$500 per year for specialized programs for foreigners. Postgraduate fees are roughly double.

Fees are much higher at private universities. For example, at the *Instituto Tecnológico Autónomo de México (ITAM)*, Autonomous Institute of Technology, the annual fees range from about \$26,000 mexican pesos to almost \$30,000 mexican pesos. Other private universities charge fees in the same general range. Fees are generally levied by the credit or by the hour, so costs vary depending on the number of credits needed for graduation and the time taken to complete them. The usual completion time for an undergraduate degree is 4.5 years.

REGISTERED UNIVERSITY STUDENTS BY TYPE OF INSTITUTION, 1992-93

	Federal	State	Autonomous	Private	Total
Teachers' colleges	6,078	74,767	0	29,930	110,775
Undergraduate	197,737	152,617	559,461	234,362	1,144,177
Postgraduate	5,314	6,455	27,569	12,141	51,479
Total	209,129	233,839	587,030	276,433	1,306,431

Source: Secretaría de Educación Pública (SEP), Secretariat of Public Education.

ACCOMMODATION

Accommodation costs are an important barrier for students who must live away from home. Very few Mexican universities offer student residences. At those that do, such as *Instituto Tecnológico de Estudios Superiores Monterrey (ITESM)*, Monterrey Technical Institute, costs range from under \$5,000 Mexican pesos per semester for double rooms to almost \$10,000 Mexican pesos for a single, air-conditioned room. Living in Mexico City requires approximately US \$500 to \$600 per month.

TECHNICAL INSTITUTES

Mexico has a coordinated multi-level system of technical training. Public activities in this area are the responsibility of the *Sistema Nacional de Educación Tecnológica (SNET)*, National Technological Education System. The *SNET* operates at four levels:

- job training, including 50 specialties and 6 technical careers through 235 campuses;
- high school technical training, including 975 campuses offering a total of 133 technical certificates and 89 technical high school diplomas;
- higher education, including 28 different degree programs offered through 116 campuses; and
- postgraduate, including 39 master's degrees and 11 doctoral programs.

In most cases, students can pursue technical studies either by attending classes, or through home studies, with access to instructors on weekends.

Job training in Mexico is known as *capacitación para el trabajo*, aimed at people already active in the labour force but who need skills upgrading. This contrasts with vocational high schools known as *bachilleratos tecnológicos*, which prepare students for future jobs. Training for technical occupations that require specialized studies after high school is known as *técnico profesional*. This includes, for example, certification for work as a welder, electrician or plumber. There is another level of technical training known as *profesional medio*, which involves one year of technical training after high school.

EDUCATION CENTRES OPERATED BY *SISTEMA NACIONAL DE EDUCACIÓN TECNOLÓGICA*

- Dirección General de Centros de Formación para el Trabajo (DGCFT)
- Colegio Nacional de Educación Profesional Tecnológica (CONALEP)
- Dirección General de Educación Tecnológica Industrial (DGETI)
- Centro de Enseñanza Técnica Industrial (CETI)
- Unidad de Educación en Ciencia y Tecnología del Mar (UECyTM)
- Dirección General de Institutos Tecnológicos (DGIT)
- Organismos Descentralizados de los Gobiernos de los Estados (ODE)
- Instituto Politécnico Nacional (IPN)
- Centro de Investigación y Estudios Avanzados del IPN (CIEA-IPN)

Source: *Sistema Nacional de Educación Tecnológica (SNET)*, National Technological Education System.

There are also a number of private technical institutes that are not part of the *Sistema Nacional de Educación Tecnológica (SNET)*, National Technological Education System, although they must be recognized by *Secretaría de Educación Pública (SEP)*, Secretariat of Public Education, or by the *Universidad Nacional Autónoma de México (UNAM)*, National Autonomous University of Mexico, in order to operate. In general, the private institutes concentrate on degree programs and do not offer industrial or high school training as the public institutes do. They are similar to universities, except that they tend to offer a wider range of technical specialties, ranging from engineering and technology to exact and natural sciences. In general, their programs are considered more pragmatic and less theoretical than the equivalent university programs.

PERSONAL SKILLS TRAINING

There is a substantial market in Mexico for specialized training marketed directly to individuals. This includes language training as well as computer training and a variety of other programs aimed at improving personal skills. The market for personal training has grown as the link between personal skills and career advancement has become more widely understood.

INDUSTRIAL SKILLS TRAINING

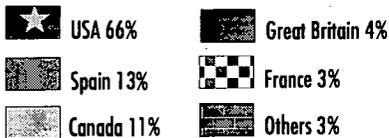
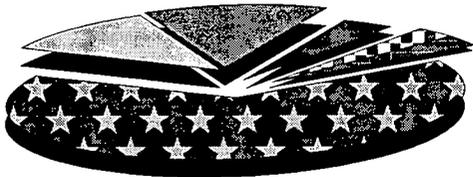
By law, companies operating in Mexico must provide skills training to their employees. According to unofficial estimates, less than one-third of employers comply with this requirement. Nonetheless, the sheer size of the Mexican workforce, well over 30 million, means that there is a substantial market for training services. According to US Department of Commerce estimates, the market for industrial training services was about US \$45 million in 1993, and import penetration was about 30 percent.

The *Ley Federal de Trabajo*, Mexican Federal Labour Law, requires that each company maintain a joint management-employee commission to oversee training systems. Training programs must be approved by the *Secretaría del Trabajo y Previsión Social (STPS)*, Secretariat of Labour and Social Welfare. A training plan must be prepared at least once every four years. The training must be delivered by a training agent who is registered with the government. Officially, there are more than 500,000 participants enrolled in about 4,000 training facilities. Another 500,000 participate in on-the-job training programs. Many employers conduct unregistered training programs because they believe that government-mandated training is unproductive.

FOREIGN TRADE

Canada is the third most important destination for Mexican degree students who study abroad, after the United States and Spain. Together, they claim 90 percent of the market.

MEXICAN DEGREE STUDENTS ABROAD



Source: Institute for International Education and the Canadian Embassy.

Education services can be exported either by sending educators and trainers to Mexico or by sending students and trainees to Canada. Neither side of this trade relationship has been very well-quantified. Exports of services are not included in the official trade statistics. Long-term students who obtain visas to attend school are recorded by immigration authorities, but participants in short-term industrial and language training programs are often recorded as business visitors or tourists.

In 1994, there were officially about 14,000 Mexican degree students studying abroad. In addition, some authorities believe that there were some 8,000 undocumented students studying in the United States. The number of students legally studying abroad fell by 28 percent in 1995 as a result of the severe crisis precipitated by the devaluation of the peso. The growth rate for students pursuing degrees abroad is expected to return to its pre-devaluation rate of about 6 percent annually. Some students who dropped out in 1995 will return to finish their degrees in 1996. It is estimated that 1994 levels will be restored early in the next century.

The United States is the most important destination for degree students who study abroad. The American share of this market rose from 65 percent to 67 percent. In 1994, Spain and Canada were the next most important destinations. Both suffered large declines in student visitors in 1995. Canada for example, hosted only 1,024 Mexican students in 1995 compared with 1,562 the year before. Other significant providers of university education for Mexicans are France and the United Kingdom.

No official data are available for Mexican imports of non-degree education and training services. It has been estimated that about 4,000 Mexicans participate in language training abroad. In 1994 this was about 10 percent of the total number of non-university, foreign-language students.

Unofficial estimates indicate that about 10,000 Mexicans received industrial training in other countries during 1993. Many of them were part of inter-company programs operated by multinationals, and the United States was the destination for about 70 percent of the trainees. Canada's share of this market has been estimated at 14 percent. The most common subjects were engineering, sciences, business management, graphic design, architecture, and hotel management.

CUSTOMERS

Customers for educational services include individual learners, corporations and public education authorities.

THE SCHOOL SYSTEM

Buyers in the school system include federal and state government agencies as well as autonomous and private institutions. Mexico is in the process of expanding its public school system. Between 1994 and 1995, enrollments increased by 3.8 percent at the preschool level, 0.7 percent at primary school and 10.8 percent at middle school.

Since 1991, the *Consejo Nacional de Fomento Educativo (CONAFE)*, National Council for the Promotion of Education, has operated several programs known as compensatory programs. They are mainly aimed at improving the primary school drop-out rate and they generally focus on the teacher as the key to improving the system. The most recent of these programs is *Programa para Abatir el Rezago en la Educación Básica (PAREB)*, a program for dismantling outdated aspects of the public education sector. It is expected to benefit 1.5 million students and more than 50,000 teachers between 1994 and 1999.

Other programs are designed to modernize teaching and administrative methods throughout the school system. Many private schools are in need of similar improvements.

UNIVERSITIES AND TECHNICAL INSTITUTIONS

Higher education in Mexico is provided by universities and technical institutes. The principal difference is that universities cover a wide range of subjects, while institutes focus more narrowly on technical subjects.

These institutes of higher learning routinely participate in joint programs with universities in other countries, especially the United States and Canada. The programs encourage the exchange of professors and students and also promote joint research projects.

CORPORATIONS

In principle, virtually all corporations should be customers for training services. But in practice, the requirement for mandatory employee training is not widely enforced. This is especially true after the economic crisis spawned by the peso devaluation of December 1994. As the recovery proceeds, demand is expected to increase as companies struggle to modernize to meet the challenges of liberalized trade.

The principal needs are for management and technical training. Mexico lacks capability in both areas to fully meet its own needs. The demands include:

- training abroad for trainers and senior management
- shop-floor training in Mexico
- seminars and other training away from work
- pre-packaged courseware

Corporate training programs are aimed at three principal groups: professionals, management trainees and blue-collar workers.

Professionals need either standard courses in administration and sciences or custom-designed programs for specific groups within the company. Courses range anywhere from one to six weeks.

Management trainees are generally recent graduates on management career paths who need specific training in company procedures. Courses are mainly designed and administered internally, and rarely exceed three weeks.

Blue-collar workers need to learn how to operate new machinery and use the latest technologies. In many cases, this involves the transfer of proprietary technology from outside the country. Courses are of the on-the-job type ranging from one to three weeks.

The *Secretaría del Trabajo y Previsión Social (STPS)*, Secretariat of Labour and Social Welfare, assists companies to carry out worker training through the *Programa de Calidad Integral y Modernización (CIMO)*. This program develops customized training programs to meet the needs of individual companies.

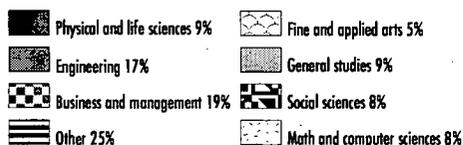
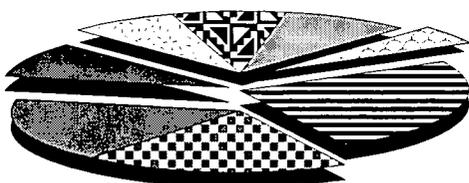
PROGRAMS FOR UNEMPLOYED WORKERS

The *Secretaría del Trabajo y Previsión Social (STPS)*, Secretariat of Labour and Social Welfare, offers a number of programs to provide vocational training to the unemployed. The most important of these is the *Programa de Becas de Capacitación para Trabajadores Desempleados (PROBECAT)*, a scholarship program designed to train unemployed workers. *PROBECAT* offers initial training for youths and others seeking a job for the first time, as well as skills upgrading. It also provides administrative and accounting training for unemployed workers interested in starting their own businesses. Training is delivered through the *Colegio Nacional de Educación Profesional y Tecnológica (CONALEP)* and through training agents including *Centros de Capacitación para el Trabajo (CECATIS)*, workplace training centres, and *Centros de Bachillerato Técnico Industrial y de Servicios (CBTIS)*, vocational training centres.

INDIVIDUAL LEARNERS

Many decisions regarding the purchase of educational services are made by individual learners. There are two broad groups of customers: graduating students from Mexican formal education institutions, and working adults who study on a part-time basis to advance their careers.

SUBJECTS STUDIES ABROAD, 1994



Source: Institute of International Education, Open Doors Study.

DEGREE PROGRAMS

Students finishing high school or undergraduate degrees may decide to pursue degree studies abroad. These are primarily children of affluent families, and their relatives may play a role in the purchasing decision. These buyers range from high school graduates seeking to attend university in another country to university graduates pursuing postgraduate degrees. The primary attraction of studying abroad is the perceived higher quality and status of foreign institutions. The majority of these students are seeking education in engineering, sciences and business. Social sciences are less popular, although still significant.

Males comprise two-thirds of those Mexican students who are pursuing degree studies abroad. This is a reflection of Mexican society, where men typically earn 40 percent more than women in the same position. The cost-benefit ratio for sending a son abroad to study is perceived as better than sending a daughter. The predominance of male students is believed to be even more pronounced in graduate programs, for the same reason.

About 70 percent of Mexicans pursuing degrees abroad are engaged in graduate studies. In general, the further away the university is located, the higher the

proportion of graduate students. Only a little more than half of Mexicans studying in the United States are in graduate programs, while the proportion in Canada is about two-thirds.

LANGUAGE TRAINING

Another major group of individual learners is adults seeking to improve their language skills. The implementation of the North American Free Trade Agreement (NAFTA) has increased interest in learning English as a means of career advancement. Training in English or French as a second language (ESL and FSL) is a large and growing market. More than 600 English language schools are registered throughout Mexico. In 1994, it was estimated that close to 50,000 Mexicans were enrolled in non-university language training at home and abroad. It is believed that the number dropped to about 43,000 in 1995, because of the peso devaluation. These figures do not include the 700,000 university students studying English as part of a degree program. FSL schools are less common, with an estimated 3,500 students studying French in private programs in 1995.

A typical foreign-language student is a high school or university graduate seeking to improve language skills prior to enrolling in a foreign degree program, particularly at the graduate level. Their average age is 22. Another major market segment is primary or secondary school students who study a foreign language during the summer months. Many of them participate in exchange programs arranged by their schools. Working professionals who need to upgrade their language skills for business reasons make up the rest of the market. This segment is considered very price sensitive, and many professionals have switched to Mexican language schools since the crisis. Language students originate primarily from the three largest metropolitan areas. Monterrey is a particularly large source of ESL students, and is considered to be the most "Americanized" of the Mexican cities.

BUSINESS TRAINING

Some individual learners also pursue training in business subjects on their own. Business training is offered by hundreds of small schools located mainly in the major urban areas. A large proportion of these schools have been recognized by the *Secretaría de Educación Pública (SEP)*, Secretariat of Public Education. This validation is considered important by employers and increases the value of the training.

Individual business training is concentrated in accounting, basic management and tourism management, as well as computer and communications skills. Students usually attend these schools on their own initiative and are seldom sponsored by their employers.

COMPETITORS

Foreign competitors are perceived as the most sophisticated, but in today's market, local education providers and consultants have a price advantage.

EDUCATION CONSULTANTS

Education consultants offer their services both to government departments and to educational institutions. They provide curriculum development, teacher training, program delivery, facilities design and related services. These services are provided by both Mexican and foreign firms. Education experts in Mexico say that this is a relatively small market, because many potential customers have their own departments to deal with these kinds of problems.

Occasionally, universities bring in independent consultants to do this type of work. But the most common approach is to seek assistance through affiliations with foreign universities. For example, the *Universidad de las Américas* is affiliated with the Association of Universities of Southern California and has cooperative programs with Harvard University. Other universities have been known to use courseware developed by foreign universities without authorization.

According to observers, the leading company in the educational consulting market is *Asesoría en Calidad y Competitividad (ACC)*. This company has experience at several educational levels. For example, it developed courseware and programs for a new bachelor's degree program at the *Universidad del Pedregal*. It designed programs for *Colegio La Salle*, in Tuxtla Gutierrez, Chiapas. And it developed training programs for teachers and administrative officials at two government-run child education and development centres known as *Centros de Desarrollo Infantil*. The company also offers recruiting and research services.

ACC contracts some work to independent specialists. This includes *Siliceo y Asociados*, which develops text books and conducts organizational assessment and human development research. The company has offices in Guadalajara, Guerrero and Mazatlán and will soon have one in Monterrey.

MEXICAN UNIVERSITIES

A university education, even in a public institution, is a luxury available only to relatively affluent Mexicans, and a foreign education is out of reach to all but the wealthy. The estimated 22,000 Mexican students pursuing degrees abroad constitute less than 2 percent of all Mexican university students. Mexico has more than 1,300 universities, but the total enrollment is less than 1.5 million, compared to a population of 100 million.

The principal competitors for Canadian universities within Mexico are the private universities. There are 85 private universities in Mexico, but 12 of them account for about two-thirds of the total private university enrollment. The number of Mexicans studying abroad is only about 10 percent of the number in private Mexican universities. However, many of those at the latter could afford to study abroad.

Mexico's universities are concentrated in the major cities of Mexico City, Puebla, Monterrey and Guadalajara. These hubs attract students from the rest of the country, notably for specialized education.

LARGEST PRIVATE UNIVERSITIES

Name	Enrollment	Location of Largest Campus
Universidad del Valle de México (UVM)	16,917	Mexico City
Universidad Iberoamericana	15,339	Mexico City
Universidad Tecnológica de México	10,836	Mexico City
Guadalajara University (UdeG)	9,000	Jalisco
Universidad de Monterrey (UdeM)	7,000	Nuevo León
Universidad de Anáhuac	6,727	Mexico City
Universidad de La Salle (ULSA)	6,428	Mexico City
Universidad de las Américas	5,669	Puebla
Universidad Regiomontana	5,000	Nuevo León
Universidad del Valle de Atemajac (UNIVA)	4,572	Mexico City
Universidad del Bajío	4,426	Guanajuato
Intercontinental	4,300	Mexico City

LARGEST PUBLIC UNIVERSITIES

■ Universidad Nacional Autónoma de México (UNAM)

■ Universidad Autónoma Metropolitana (UAM)

■ Universidad Autónoma de Guadalajara (UAG)

■ Universidad Autónoma de Chihuahua

■ Universidad Autónoma de Nuevo León (UNAL)

■ Universidad Autónoma de Chapingo (Agriculture)

■ Universidad Pedagógica Nacional (Education)

■ Universidad Autónoma de Puebla

■ Universidad Autónoma de Sonora

■ Universidad Autónoma de Oaxaca

MEXICAN TECHNICAL INSTITUTES

Mexico's higher education institutions include some highly-reputable, private technical institutes, such as the *Instituto Tecnológico de Estudios Superiores de Monterrey (ITESM)*, Monterrey Technological Institute, and the *Instituto Tecnológico Autónomo de México (ITAM)*, Autonomous Institute of Technology. The former has an enrollment of more than 34,000. Other major private institutes are the *Instituto Tecnológico de Estudios Superiores de Bajío*, and the *Instituto Tecnológico de Estudios Superiores de Occidente (ITESO)*.

These institutes have been leaders in Mexico's efforts to build stronger linkages between industry and academic institutions. *ITESM*, in particular, has several programs for adapting new technologies to the needs of industry.

There are 73 public technical institutes administered by the *Dirección General de Institutos Tecnológicos (DGIT)*, Executive Administrative Office of Technological Institutes. About 40 of them are affiliated with the *Asociación Nacional de Universidades e Instituciones de Educación Superior (ANUIES)*, National Association of Universities and Higher Education Institutes. Other important public institutes are the *Colegio Nacional de Educación Profesional Tecnológica (CONALEP)*, *Instituto Politécnico Nacional (IPN)* and the *Instituto Tecnológico de Sonora*.

FOREIGN UNIVERSITIES

The most important competition for Canadian universities comes from foreign institutions. Mexicans who can afford to study abroad choose from several countries. The majority of them are seeking English-language studies and they attend university in the United States, Canada and the United Kingdom. A significant minority are interested in studying in French and they go to either France or Canada. Finally, a small number pursue Spanish-language training in Spain.

UNITED STATES

Proximity to the Mexican market has helped American universities to dominate the market for degree programs. About 200 American universities have established links with about 40 of their Mexican counterparts. This allows them to respond quickly to changes in demand as well as to develop course equivalency standards.

Another advantage enjoyed by the United States is the high level of name recognition of some prominent schools. This factor often harms excellent universities with lower name recognition, and many of them have advertised in Mexico to compensate. American universities have also made good use of information centres in Mexico.

Price is the principal disadvantage for US competitors. The yearly cost of living and studying in the US is typically US \$15,000 and can be much more for the big-name private universities. Graduate programs usually begin only in September. Visa requirements and complex testing and admission procedures are also sometimes an obstacle.

UNITED KINGDOM

British universities have only recently begun to promote their product in the Mexican market. Prestige is a major asset, and the combination of English-language training in a European location has proven very attractive to Mexican students. Another advantage is that a master's degree in the UK is a one-year program, compared with two in most American universities. The simplicity of the application process and flexible scheduling are also considered advantages.

Distance and cost are Britain's main competitive disadvantages. The annual cost of living and studying in the UK is roughly US \$30,000. British universities have acted to offset these disadvantages with attractive financial aid packages.

SPAIN

Spain is the most popular destination for Mexican students who do not speak English. There is a well-established Mexican community in Spain that has a long history of promoting exchange programs. It has the advantage of the same language and a cultural affinity with Mexico.

Spanish universities, however, do not enjoy the prestige of their foreign competitors. Their quality is not well-respected in Mexico, and they are perceived as having a poor international mix among their faculties. Many students believe that the networking possible in Mexican universities is more important than the advantages of a Spanish education. The cost of studying in Spain is about twice the cost of a university of equivalent stature in Mexico, although Spain does offer financial aid. The increasing importance of the job market based in North American Free Trade Agreement (NAFTA) countries is likely to cut into Spain's market share in the future.

FRANCE

French universities are considered prestigious and enjoy the attractions of a European location. They also offer a variety of aid packages. On the other hand, they are competing for a very small sub-market of French-speaking Mexicans. Visa application procedures are complex. The high cost of living and studying in France, combined with a perception of ethnic tensions there, are also important disadvantages. The main threats to the French market share come from French-language or bilingual institutions in Canada.

CANADIAN STRENGTHS

Mexican students who have studied in Canada say that potential employment opportunities are the biggest attraction. Canada's universities are regarded as superior to those in both the US and Mexico in this regard. For any given quality level, Canadian universities also cost less.

The prestige of the university is the most commonly mentioned decision factor in selecting a particular institution. Courses offered, cost and program flexibility are also major considerations. Canadian visas are considered more accessible and this is regarded as a competitive advantage by some students.

REASONS FOR CHOOSING A CANADIAN LOCATION

1. After graduation — perceived employment opportunities are better than in Mexico or the United States.
2. Lower cost at a similar quality level to the average American university.
3. Previous experience in Canada: e.g. tourist, ESL student.
4. Recommended by relatives, friends or school faculty.
5. Safer and cleaner than both Mexico and the United States.
6. Offers the precise areas of study desired.
7. Offers a francophone culture.
8. Relatives in Canada.
9. Alternative to American universities.

Source: Focus group study conducted by InfoMex for the Canadian Embassy in Mexico, December 1995.

LANGUAGE SCHOOLS

The language training market is dominated by about a dozen firms. Many of them are affiliates of large international organizations. The largest is *Interlingua*. The economic crisis has improved the competitiveness of these schools relative to foreign alternatives. For the same reason, freelance English teachers are emerging as important competition even for the English as a Second Language (ESL) schools in Mexico. Since foreign language teaching is not regulated, anyone can enter this business. As a result, there are many individuals teaching English and French and, in a few cases, they are illegally using courseware from the major schools. Executives of the major schools said in interviews that they tend to get former students back when they realize the lower effectiveness of freelance teachers. They say that the gradual recovery of the economy is also contributing to this trend.

Berlitz was one of the hardest hit by devaluation, because this school has standardized dollar-based fees around the world. Also, its clientele included large companies and banks, which reduced its training expenditures during the crisis. The advantage Berlitz possesses is a strong focus on conversational skills. In an effort to stay competitive, the other major schools are trying to offer more hours of training for the same fee. This approach has been relatively successful for schools such as *Interlingua* and Quick Learning.

Only about 10 percent of Mexican ESL students travel abroad to pursue their training. The principal destinations are the United States, Canada and the United Kingdom. Market shares are difficult to estimate because of differences in visa requirements. Canada and the UK do not require visas for the short stays involved, while the US does. Demand fell by about 25 percent in 1995, but Canadian ESL schools say they expected a drop of up to 40 percent. Little reduction is expected in the UK share, because British ESL schools cater to a very affluent clientele.

On the other hand, Canadian French as a Second Language (FSL) schools are expecting a drop of only about 15 percent as a result of the devaluation. This is partly because there are fewer FSL schools in Mexico which can offer lower-cost alternatives. FSL studies in France remain a very expensive proposition, but this is not necessarily an obstacle for the affluent families involved. France's FSL enrollments are estimated to have fallen by 25 percent in 1995.

MAJOR MEXICAN LANGUAGE SCHOOLS

- Interlingua

- Angloamericano*

- Escuela de Interpretes y Traductores

- Quick Learning*

- Instituto Anglo-Mexicano de Cultura A.C.

- Glen International*

- Berlitz

- Coronel Hall

- Instituto Superior de Interpretes y Traductores

- Instituto Hammer Sharp

- Centro de Enseñanza de Lenguas Extranjeras de la UNAM

Note: *schools affiliated to the *Union Nacional de Escuelas de Idiomas (UNEI)*, National Union of Language Schools.

BUSINESS SKILLS SCHOOLS

Private business skills schools have not established a major presence in Mexico, partly because of competition from vocational schools and universities. Both offer business courses and seminars as part of non-degree programs.

A small number of business schools cater to the needs of students who seek specialized programs. Lower costs give some of them a competitive advantage relative to universities. But the fact that they are not recognized by the *Secretaría de Educación Pública (SEP)*, Secretariat of Public Education, or the *Universidad Nacional Autónoma de México (UNAM)*, National Autonomous University of Mexico, limits the size of their market.

One of the most prominent schools in this market is the *Instituto Angloamericano*, which offers a one-year program covering language skills, computers, accounting, business and marketing.

Students at these types of schools tend to be young women from the lower-middle class, between 17 and 25 years old, with a high school education. Typically, they attend business school because their families are not able to afford a university education but are aware of the importance of education in employment. Time is as heavily weighed as price, and these families often consider a university education too time-consuming to be cost-effective.

The most successful business schools are those specializing in computer training. Mexico is a country of young people and technology is considered a tool of their generation. Computers are seen as a way of increasing employability and circumventing the older generations' traditional hold on power and information. Secretaries are more likely to require computer skills than language skills.

INDUSTRIAL TRAINING PROVIDERS

Mexican companies buy industrial training services from a variety of domestic and foreign consultants and other training providers. Registered training programs must be executed by training agents who are registered with the *Secretaría del Trabajo y Previsión Social (STPS)*, Secretariat of Labour and Social Welfare. In 1993, there were about 5,600 registered training agents. Sixty-one percent of them were individual training agents and the rest were training organizations. The *Asociación Mexicana de Capacitación de Personal (AMECAP)*, Mexican Association of Personnel Training, has about 800 members. Almost 60 percent of the registered firms are located in the Federal District or in the State of Mexico. The rest are spread throughout the country.

Many larger companies, especially those based in the United States, operate their own training centres in Mexico. This includes the "Big Three" automakers as well as IBM, DuPont, 3M, Kodak and other companies using advanced technologies. Training centres are operated by a number of industries, and by some major Mexican corporations, including *Petróleos Mexicanos (PEMEX)*, the national oil company. These centres may be seen as competitors or customers depending on the product offered.

Other companies buy training services from independent providers, some of which are based in the United States. In the management training field, General Physics Service and the American Management Association are frequently mentioned as important players. Hemphill Schools and National Schools are active in the technical training area.

TRENDS AND OPPORTUNITIES

The economic crisis has placed greater emphasis on price competitiveness. But at the same time, it has increased the need for the skills needed to modernize the Mexican economy.

The most important recent development in Mexico was the devaluation of the peso. The new government of President Ernesto Zedillo came to power on December 1, 1994. Three weeks later, during the Christmas holidays, it abruptly stopped supporting the peso. Within days the peso had lost one-third of its value, and by the time it eventually stabilized it was worth less than half its former value relative to the US dollar. The secretary of finance was forced to resign in the wake of the severe economic crisis that followed.

The devaluation has had two conflicting effects on the demand for educational services. On one hand, it severely curtailed the ability of Mexican companies, educational agencies and individual learners to pay for imported goods and services. As a result, imports of educational services fell by an estimated 25 percent during 1995.

On the other hand, the devaluation dramatically improved the competitive position of Mexico's export industries. Mexico's merchandise exports surged by almost 30 percent in the first nine months of 1995. To take advantage of this export boom, many Mexican companies have been forced to modernize so they can meet international quality standards. The crisis has also forced a general rationalization of the Mexican manufacturing sector. These trends have increased the need for all types of education and training, which was already in strong demand because of the liberalization of trade which began in the late 1980s.

PUBLIC EDUCATION

The stabilization plan implemented by the government in reaction to the peso crisis has required severe cuts in government spending. The problem was exacerbated by the reported transfer of some 150,000 students from private schools to public schools following the devaluation. But at the same time, improving the national education system remains a major priority. By 2000, the proportion of gross domestic product (GDP) allocated to public education is expected to rise to 8 from 5 percent in 1993.

During the term of former president Carlos Salinas, the *Solidaridad* program, administered by the *Secretaría de Desarrollo Social (SEDESOL)*, Secretariat of Social Development, was the major source of funding both for school construction and student assistance. A total of \$3.6 billion Mexican pesos was allocated to education during the government's six-year term. The *Solidaridad* program has been criticized for undue political influences on spending priorities and it was frozen by the incoming Zedillo government. Knowledgeable observers say that the program is now seen as an impediment to efforts by President Zedillo to distance himself from his predecessor. The decentralization program now being implemented by the new government is also an important factor in the spending freeze.

As a former Secretary of Public Education, President Zedillo is regarded as a strong proponent of spending on education, so the educational components of *Solidaridad* are likely to survive. Most analysts believe that *Solidaridad* will be re-engineered and reinstated under a new name.

EDUCATION SPENDING UNDER THE SOLIDARIDAD PROGRAM '000 PESOS

Year	Infrastructure	School Improvement	Scholarships
1989	200,200		
1990	309,100	183,257	
1991	377,500	313,709	193
1992	461,100	323,228	527
1993	367,900	353,665	844
1994	447,500	342,787	1,190

Source: *Solidaridad: Seis Años de Trabajo*, Secretaría de Desarrollo Social (SEDESOL), Secretariat of Social Development, 1994.

Modernizing the education system will require considerable foreign assistance. Consultants are needed for virtually all aspects of curriculum development and program delivery. Although Mexican government budgets have been severely constrained by the economic crisis, financing is still available from the major international development banks.

World Bank (WB) assistance is being channeled through the International Bank for Reconstruction and Development (IBRD). It has agreed to contribute US \$265 million to a US \$412 million project aimed at improving the quality of technical education and training. The program will most likely be operated through existing educational organizations, such as *Programa de Becas de Capacitación para Trabajadores Desempleados (PROBECAT)*, a program of funding industrial training for the unemployed.

In 1994, the Inter-American Development Bank (IADB) approved US \$393 million in funding for a US \$653 million project to improve the Mexican primary education system. The program includes training for mothers of young children, as well as literacy training for adults. Consultants will be hired to train teachers and supervisors as well as design textbooks and conduct studies.

Another IADB project involves modernization and creation of infrastructure for the *Universidad Nacional Autónoma de México (UNAM)*, National Autonomous University of Mexico. The program is called UNAM-IABD and focusses primarily on the construction of new buildings, labs and libraries as well as the modernization of equipment. The funding is focussed on the exact and natural sciences and internal consultants have been engaged.

The executing agency for most IADB programs in Mexico is the *Consejo Nacional de Fomento Educativo (CONAFE)*, National Council for the Promotion of Education. Through *CONAFE*, the IADB is partially financing the *Programa Integral para Abatir el Resago Educativo (PIARE)*, a five-year program begun in 1995. This program focusses on initial, primary and adult education.

INDUSTRIAL TRAINING

The need for improved industrial training to help Mexico adapt to a liberalized trade environment has been recognized by the government. In May 1995, President Zedillo, a former secretary of public education, presented the *Plan Nacional de Desarrollo (PND)*, National Development Plan, for his six-year term. The plan includes a call for more and better labour training. It proposes stronger links between industry and educational institutions, as well as new forms of certification to recognize practical skills. It also points to the need for improved opportunities for life-long learning.

The *PND* skills certification initiative will reinforce existing programs such as the *Programa de Becas de Capacitación para Trabajadores Desempleados (PROBECAT)*, a program of funding industrial training for the unemployed and the *Programa de Calidad Integral y Modernización (CIMO)*, a program of industrial training in the workplace. These are the government's two most important industrial training programs.

- *PROBECAT's* goals for the period 1993 to 1997 are to provide new equipment and machinery to 300 campuses that serve as training agents, to award up to 300,000 scholarships, and to locate 1.6 million job openings for unemployed workers.
- The objectives of *CIMO* for 1993 to 1997 are to assist 80,000 companies, employing 400,000 workers, to become more competitive. The organization offers a variety of training and consulting services.

Industrial training providers will find that the need for their services is not always backed up by an ability to pay. In the short run, the strongest demand will be for pre-packaged courses and other training solutions that can achieve fast results at relatively low cost.

In the long run, the best opportunities will be for training providers who can deliver their products in Spanish. But in the shorter term, costs can be minimized using train-the-trainer approaches. Mexican trainers could be trained in Canada, for example, and then return to Mexico to pass on their new knowledge.

HIGHER EDUCATION

University officials in Canada, the US and Mexico have been active for the past few years in developing trilateral contacts. These contacts have the potential to increase the international mobility of scholars, especially at the graduate student and faculty levels. For example, in 1995 the Canadian government contributed C \$1.5 million to the Trilateral Task Force on North American Academic Cooperation. This fund is used to finance trilateral projects which must involve at least two educational institutions in each country. One of the objectives of the program is to develop practical partnering techniques.

Eleven projects were funded by the Government of Canada in the first year of this three-year program. The fields covered included architecture, business, engineering, health, law and technology. The Canadian partners are 15 universities and 4 colleges from across Canada. More than 200 Canadian students will participate in academic and work exchanges with partner institutions in the US and Mexico over the next three years.

Several other groups are working to improve academic mobility within North American Free Trade Agreement (NAFTA) countries. The Ontario Institute for Studies in Education (OISE), located at the University of Toronto, established a Canada-Mexico Cultural Exchange Centre in 1994. In February 1995, the Canadian Bureau for International Education (CBIE) established an Internet list server called CANALA-L. In September of the same year, the Institute of International Education (IIE) announced the establishment of the North American Cooperation in Higher Education Network, with a list server called NACHE-Net. Several trilateral conferences have been held, including one in Nanaimo, British Columbia in May 1995. Many Canadian academics attended the annual assembly of the *Asociación Mexicana para la Educación Internacional*, Mexican Association for International Education, in Mazatlán, Sinaloa, in September 1995.

These linkages are seen as a first step towards establishing practical mechanisms for improved student mobility. Many observers feel that they will need to be backed by improved promotional activities.

LANGUAGE TRAINING

Most observers consider the market for English as a Second Language (ESL) and French as a Second Language (FSL) training in Mexico to be relatively saturated. New entrants into this market should have some unique product-offering or other competitive advantage.

Language training in Canada has long-term growth potential. In general, Mexicans like the idea of visiting Canada. They perceive Canada as being safe, culturally diverse, and offering sophisticated programs. Canada's simple visa requirements and relatively low costs are major competitive advantages.

COMPUTER TRAINING

A growing need for computer skills is driving a strong market for related training. Students at computer training schools include high school graduates, university students, office workers and secretaries. The primary age group is 17 to 26 years. The lack of effective computer training at schools and universities, combined with the need for fast results, are important demand factors.

The programs most in demand are practical instruction in Microsoft products including Windows, Word, Excel and PowerPoint. There is also a demand for more technical computer science training for prospective programmers, graphic designers and system administrators. Official recognition by the *Secretaría de Educación Pública (SEP)*, Secretariat of Public Education, is a major competitive advantage.

Canadian companies setting up operations in Mexico will encounter stiff competition from established computer schools such as ICM, Herman Hollerith and *Instituto Fleming*. Advanced teaching methods and customized services can help to meet this competition. The fact that Canada is perceived as a technologically-advanced country is also a competitive advantage.

DISTANCE EDUCATION

Many Mexican educators have experience with distance education. The *Solidaridad* Satellite System has been used for several years to deliver basic education, conferences, seminars and graduate courses throughout Mexico. Many believe that its use will expand, since it has proven to be a cost-effective alternative to travelling abroad.

In 1993, the Inter-American Distance Education Consortium (*CREAD*) was founded. Its purpose is to foster inter-institutional cooperation throughout the Americas and the Caribbean. It is dedicated to developing a single-satellite system for use throughout the hemisphere. The long-run objective is to offer degree programs as well as technical training via satellite.

The costs of installing distance education infrastructure are a major obstacle to the realization of these goals. Many Mexican universities and corporations cannot afford the US \$500,000 installation costs involved. Mexican funding for such projects has been sporadic. Education experts in Mexico say that Canadian universities proposing joint projects typically expect the Mexican government to provide the bulk of this funding.

Cultural barriers also stand in the way of expanding distance education systems. Mexicans tend to be skeptical about the quality of distance education. Students believe that a degree obtained this way will not be as valuable in the job market as a resident degree. They also fear that the Canadian and American teaching methods will conflict with their traditional formal lecture styles. Eventually, considerations of cost and efficiency are likely to overcome these obstacles.

THE SOLIDARIDAD SATELLITE SYSTEM

The *Solidaridad* Satellite System consists of two satellites, *Solidaridad 1* and *2*. They were launched in November 1993 and October 1994 respectively. In 1998, an older satellite, *Morelos 2* will be terminated, leaving only two operational satellites. Both satellites have identical designs and offer services throughout Latin and South America. The *Secretaría de Comunicaciones y Transportes (SCT)*, Secretariat of Communications and Transportation, and the *Secretaría de Educación Pública (SEP)*, Secretariat of Education, use the *Solidaridad* system to operate an educational service known as EDUSAT which has been operating since July 1994.

Through this project, basic education is given to students attending 9,000 schools throughout Mexico. This system uses *Solidaridad 1* and operates on the C band. It will continue to operate as long as the satellite continues to function, an estimated 14 years. The *Solidaridad* satellites were developed by Hughes Space and Communications Company and are the property of the *SCT*. *TELECOMM* is *SCT*'s department responsible for the operation and commercializing of the satellites.

THE REGULATORY ENVIRONMENT

Registration is required only for industrial training providers delivering government-mandated training. But accreditation is a market advantage even where it is not required.

Foreign firms providing education and training services may be majority foreign owned, provided that they are authorized by the *Comision de Inversion Extranjera*, Foreign Investment Commission. A firm which wants to provide industrial training under Mexico's mandatory training laws must register as a *promotora de capacitación*, training agent, with the *Secretaría del Trabajo y Previsión Social (STPS)*, Secretariat of Labour and Social Welfare. Individual trainers must also be registered. The regulations recognize five types of training agents:

- training institutions or schools, which have physical facilities;
- institutional trainers, who are individuals working for training institutions;
- freelance trainers, who provide training on an individual basis;
- internal trainers, who work for employers; and
- auxiliary training agents, including mainly foreign individuals and institutions, as well as companies that supply training as part of a sale of equipment or purchase of goods.

This registration is required only for the training to be recognized under the regulations. Many Mexican companies do not register all of their training activities. Further information can be obtained from the *Oficina de Registro para Agentes de Capacitación*, Office of Registration of Training Agents at the *Secretaría del Trabajo y Previsión Social (STPS)*, Secretariat of Labour and Social Welfare. For other education and training providers, accreditation by the *Secretaría de Educación Pública (SEP)*, Secretariat of Public Education, or the *Universidad Nacional Autónoma de México (UNAM)*, National Autonomous University of Mexico, offers distinct market advantages even if it is not required.

Trainers or educators who visit Mexico to work must obtain visas. There are several types of visas, and the choice depends mainly on the length of time the foreigner will remain in Mexico. Information can be obtained from the Mexican Embassy in Ottawa or the consulates across Canada.

Mexican students studying in Canada must obtain a student visa if they are to be engaged in full-time study for more than 90 days. A letter of acceptance from the university or school involved will simplify the application process. Students studying for less than three months need a 90-day visitor's visa. Student visas will be issued for up to a year. An extension can be arranged from Canada but must be requested in advance. For visitor's visas, proof of sufficient funds to live in Canada for 90 days and a round-trip ticket are required. Visas can be issued at the Canadian Embassy in Mexico City or the consulates in Monterrey and Guadalajara.

MARKET ENTRY STRATEGIES

Partnering with local counterparts is the most effective strategy for selling educational services in the Mexican market.

Canadian organizations that have succeeded in Mexico almost always say that partnering was a key element of their market entry strategy. Moving into Mexico involves overcoming substantial cultural and language barriers. Mexicans like to do business with people they know, and it takes time to build the necessary network of contacts.

Mexican educational and training organizations generally have good access to potential customers. But they lack sophisticated programs, advanced delivery systems and state-of-the-art evaluation methods. Canadian organizations can help to fill these gaps in exchange for easier access to buyers.

INDUSTRY ASSOCIATIONS

Industrial and commercial training providers can, in some cases, make contact directly with large Mexican companies. But in general it is more effective to approach industry or training associations, especially those with training centres. Training centres are operated by a variety of *cámaras*, industrial chambers of commerce, as well as by other business associations. Some of them engage outside consultants to help develop their programs, or they can also direct suppliers to companies with active training programs.

Marketing efforts should be directed mainly to large companies and associations with a genuine interest in training. Technical, managerial and administrative training are considered the best prospects, because Mexico's laws requiring broader industrial, health and safety training are not effectively enforced.

STUDENT RECRUITING

Academic institutions can recruit students directly by sending missions to Mexico and by circulating their calendars and other literature. There are two principal sources of information about Canadian educational centres in Mexico: the Canadian Embassy Library and the Institute of International Education (IIE). Both report that their information from Canadian universities is very limited. Most of the time, students are not able to take home copies of documents, and are restricted to making photocopies. Education sector observers in Mexico say that Canadian universities have not consistently promoted their products. One expert referred to their efforts as "shotgun tactics". Mexican analysts believe that a longer-term presence will be needed to raise the profile of Canadian universities.

PRODUCT ADAPTATION

Adapting programs and promotional literature for the Mexican market is considered a good way for Canadian institutions to raise their profile. In general, US educators and trainers are regarded as more adaptable to Mexican needs. This probably reflects a stronger emphasis on marketing rather than a higher level of underlying cultural sensitivity. For the most part, Canadian educators have not tended to see their students as customers. According to some experts, Canadian universities have also been slow to adapt their offerings to the needs of Mexican industry for short-term practical programs.

Industrial training providers are more market oriented, but industry experts say that they have not fully adapted their programs and promotional methods to the Mexican environment. Mexican businesses have traditionally regarded employee training more as an expense than an investment, and promotional material must confront that misconception. Also, training packages should be adapted to the Mexican need to train a small number of trainers abroad who can then pass on knowledge to others at home.

TRAVEL AGENCIES

Canadian language schools say that Mexican travel agencies are an excellent way to promote their products. Mexican travel agents say that Canadian schools are quick to provide information and service. By one estimate, language schools spend about 20 percent of their revenue on promotion, which is much higher than the spending by universities and technical training providers.

FINANCIAL ASSISTANCE

The majority of Mexican students studying abroad finance their studies using personal and family resources. This means that many students come from wealthy families and do not need financial aid. In the United States, for example, the predominance of the very wealthy among MBA students has been called the "Gucci bag syndrome". For middle-class families, it is common for extended families to pool resources to pay for the education of one person.

Graduate students are more likely than undergraduates to receive financial assistance from the host university. Thirty-six percent of graduate students get assistance from that source, while the figure is only 7 percent for undergraduates. The Mexican government and the host government are also sources of finance.

Particularly since the devaluation of the peso, Canadian universities that can offer some form of financial assistance are likely to enjoy a competitive advantage. France and the United Kingdom have already established themselves as leaders in this area.

ACADEMIC LINKS

Electronic mail and list servers over the Internet are beginning to open new communication links between educators in Canada, Mexico and the United States. For example, a list server called CANALA-L is operated by the Canadian Bureau for International Education (CBIE) with financial assistance from CIDA. The Internet address is canala-l@cunews.carleton.ca and it permits educators, education administrators and graduate students to exchange information, conduct surveys and announce events.

The effectiveness of this approach has been hampered somewhat by difficulties in communicating by e-mail with Mexicans. E-mail facilities are growing rapidly but are still not as readily available as they are in Canada. Mexican academics are badly underpaid and there is a high level of turnover. They are usually forced to hold a variety of jobs, which can make them hard to reach. There are also cultural barriers to e-mail in Mexico, where computer literacy is not widespread and where partnerships have been traditionally based on more formal forms of communication.

GRADUATE NETWORKS

Mexican educational experts point out that Canada has been less successful than the United Kingdom, France and Spain in developing networks of graduates. Networking by the British community in Mexico, for example, is considered an instrumental part of that country's promotional efforts.

ACCREDITATION

Canadian universities lag behind their American competitors in the development of comprehensive accreditation procedures that facilitate credit transfers. In proportional terms, American universities have three times as many accreditation programs as Canada.

Partnering with Mexican educational institutions is one way for universities to both establish course equivalencies and focus their promotional efforts on appropriate target audiences.

LANGUAGE UPGRADING OPPORTUNITIES

The Test of English as a Foreign Language (TOEFL) score required for entrance to Canadian universities is 600 points, compared with 450 for most American schools. Similarly, British entrance requirements are based on the International English Language Testing System (IELTS), which is considered easier than the TOEFL. In both the United States and Britain, students with marginal language skills are offered English upgrading while they study. Language barriers are higher in Canada, suggesting that new upgrading programs could facilitate market entry.

WHERE TO GET HELP

CANADIAN GOVERNMENT DEPARTMENTS AND SERVICES IN CANADA

DEPARTMENT OF FOREIGN AFFAIRS AND INTERNATIONAL TRADE (DFAIT)

DFAIT is the Canadian federal government department most directly responsible for trade development. The InfoCentre should be the first contact point for advice on how to start exporting. It provides information on export-related programs and services, acts as an entry point to DFAIT's trade information network, and can provide copies of specialized export publications and market information to interested companies.

InfoCentre

Tel.: 1-800-267-8376 or (613) 944-4000
Fax: (613) 996-9709
FaxLink: (613) 944-4500
InfoCentre Bulletin Board (IBB):
1-800-628-1581 or (613) 944-1581
Internet: <http://www.dfait-maeci.gc.ca>

The Latin America and Caribbean Branch promotes trade with Mexico. There are several trade commissioners at the Embassy of Canada in Mexico City, as well as in the satellite offices in Monterrey and Guadalajara. Trade commissioners can provide a range of services including introducing Canadian companies to potential customers in Mexico, advising on marketing channels, assisting those wishing to participate in trade fairs, helping to identify suitable Mexican firms to act as agents, and compiling strategic business intelligence on potential foreign customers.

Latin America and Caribbean Branch

Department of Foreign Affairs and International Trade
Lester B. Pearson Building
125 Sussex Drive
Ottawa, ON K1A 0G2
Tel.: (613) 996-5547
Fax: (613) 996-6142

INTERNATIONAL TRADE CENTRES

International Trade Centres have been established across the country as a convenient point of contact to support the exporting efforts of Canadian firms. The centres operate under the guidance of DFAIT and all have resident trade commissioners. They help companies determine whether or not they are ready to export, assist firms with market research and planning, provide access to government programs designed to promote exports, and arrange for assistance from the trade commissioners in Ottawa and trade officers abroad. Contact the International Trade Centre nearest you:

Newfoundland

International Trade Centre
P.O. Box 8950
Atlantic Place
215 Water Street
Suite 504
St. John's, NF A1B 3R9
Tel.: (709) 772-5511
Fax: (709) 772-2373

Prince Edward Island

International Trade Centre
P.O. Box 1115
Confederation Court Mall
134 Kent Street
Suite 400
Charlottetown, PE C1A 7M8
Tel.: (902) 566-7400
Fax: (902) 566-7450

Nova Scotia

International Trade Centre
P.O. Box 940, Station M
1801 Hollis Street
Halifax, NS B3J 2V9
Tel.: (902) 426-7540
Fax: (902) 426-2624

New Brunswick

International Trade Centre
1045 Main Street
Unit 103
Moncton, NB E1C 1H1
Tel.: (506) 851-6452
Fax: (506) 851-6429

Quebec International Trade Centre
5 Place Ville-Marie
Seventh Floor
Montreal, PQ H3B 2G2
Tel.: (514) 496-4636
Fax: (514) 283-8794

Ontario International Trade Centre
Dominion Public Building
1 Front St. West
Fourth Floor
Toronto, ON M5J 1A4
Tel.: (416) 973-5053
Fax: (416) 973-8161

Manitoba International Trade Centre
P.O. Box 981
330 Portage Avenue
Eighth Floor
Winnipeg, MB R3C 2V2
Tel.: (204) 983-4540
Fax: (204) 983-2187

Saskatchewan International Trade Centre
The S.J. Cohen Building
119-4th Avenue South
Suite 401
Saskatoon, SK S7K 5X2
Tel.: (306) 975-5315
Fax: (306) 975-5334

Alberta
**Edmonton office is
also responsible for
Northwest Territories*
International Trade Centre
Canada Place
9700 Jasper Avenue
Room 540
Edmonton, AB T5J 4C3
Tel.: (403) 495-2944
Fax: (403) 495-4507

International Trade Centre
510-5th Street S.W.
Suite 1100
Calgary, AB T2P 3S2
Tel.: (403) 292-6660
Fax: (403) 292-4578

British Columbia
**Vancouver office is also
responsible for the Yukon*
International Trade Centre
300 West Georgia Street
Suite 2000
Vancouver, BC V6B 6E1
Tel.: (604) 666-0434
Fax: (604) 666-8330

WORLD INFORMATION NETWORK FOR EXPORTS (WIN EXPORTS)

WIN Exports is a computer-based information system designed by DFAIT to help Canada's trade development officers abroad match foreign needs to Canadian capabilities. It provides users with information on the capabilities, experience and interests of more than 23,000 Canadian exporters. To register on WIN Exports, call (613) 996-5701, or fax 1-800-667-3802 or (613) 944-1078.

PROGRAM FOR EXPORT MARKET DEVELOPMENT (PEMD)

PEMD is DFAIT's primary export promotion program. It supports a variety of activities to help Canadian companies expand into export markets.

PEMD shares up to 50 percent of eligible expenses. Program financial assistance is a repayable contribution, not a grant, and must be approved in advance. Funded activities include:

- Market Development Strategies, which consist of a package of support for visits, trade fairs, and market support initiatives, under one umbrella of the company's marketing plan.
- New to Exporting Companies, which provides a vehicle for these companies to seek out individual export opportunities, either through a market identification visit or participation in an international trade fair.
- Capital Projects Bidding for specific projects outside Canada involving international competition/formal bidding procedures.
- Trade Association Activities undertaken by non-sales national trade or industry associations on behalf of their member companies.

Support is provided for certain types of government-planned activities, such as outgoing trade missions of Canadian business representatives and incoming missions to Canada of foreign business persons and officials who can influence export sales. For general information, call the InfoCentre at 1-800-267-8376. For applications for assistance, call the International Trade Centre nearest you.

INTERNATIONAL FINANCING

DFAIT helps Canadian exporters interested in pursuing multilateral business opportunities financed by international financing institutions (IFIs). Canadian exporters and trade associations can access market data, obtain a better understanding of the competition, and determine if an IFI-funded market opportunity is practical and worth pursuing. DFAIT can provide information and advice on the availability of Canadian government-funded assistance programs and can assist companies in developing effective export marketing. For further information, contact:

International Financing Division

Department of Foreign Affairs and International Trade
Lester B. Pearson Building
125 Sussex Drive
Ottawa, ON K1A 0G2
Tel.: (613) 995-7251
Fax: (613) 943-1100

TECHNOLOGY INFLOW PROGRAM (TIP)

Managed by DFAIT and delivered domestically by the National Research Council, TIP is designed to help Canadian companies locate, acquire and adopt foreign technologies by promoting international collaboration. The Department of Industry (DI) also helps in program promotion. TIP officers respond to requests to identify technology sources and opportunities for cooperation between Canadian and foreign firms. The Program also helps Canadian firms make exploratory visits abroad to identify and gain first-hand knowledge of relevant foreign technologies, as well as how to negotiate to acquire them. For information, call (613) 993-5326.

INVESTMENT DEVELOPMENT PROGRAM

The Investment and Technology Bureau (TID) promotes Canada as an attractive, competitive destination for business investment to potential foreign investors. It actively encourages investments that take the form of new plant and equipment, joint ventures or strategic partnerships. The Bureau is especially interested in attracting investment that introduces new technology into Canada, which is key to creating new jobs and economic opportunities. It also helps Canadian companies to find international investment partners and to access international sources of capital and technologies. TID provides support to the chief executive officers of Canadian subsidiaries of multinationals which are seeking to attract manufacturing and R&D mandates to Canada. It also monitors and analyzes investment trends and perceptions of Canada as an investment site. TID works closely with the "geographic" branches of DFAIT and the investment counsellors at Canadian missions around the world, as well

as with provincial and municipal authorities, and professional and business organizations. For more information, contact:

Investment and Technology Bureau (TID)

Department of Foreign Affairs and International Trade
Lester B. Pearson Building
125 Sussex Drive
Ottawa, ON K1A 0G2
Tel.: (613) 995-4128
Fax: (613) 995-9604

HUMAN RESOURCES DEVELOPMENT CANADA (HRDC)

Occupational and Career Development Division
Phase IV, Place du Portage
Hull, PQ K1A 0J9
Tel.: (819) 953-7452
Fax: (819) 997-0227

CANADIAN BUREAU FOR INTERNATIONAL EDUCATION (CBIE)

220 Laurier Avenue West
Suite 1100
Ottawa, ON K1P 5Z9
Tel.: (613) 237-4820
Fax: (613) 237-1073
Internet: canala-l@cunews.carleton.ca

DEPARTMENT OF INDUSTRY (DI)

DI was created with a broad mandate to make Canada more competitive by fostering the growth of Canadian businesses, by promoting a fair and efficient marketplace for business and consumers, and by encouraging commercial ventures in scientific research and technology. In the area of small business, it has been given specific responsibility to:

- develop, implement and promote national policies to foster the international competitiveness of industry; the enhancement of industrial, scientific and technological development; and the improvement in both the productivity and efficiency of industry;
- promote the mobility of goods, services, and factors of production within Canada;

- develop and implement national policies to foster entrepreneurship and the start-up, growth and expansion of small businesses;
- develop and implement national policies and programs respecting industrial benefits from procurement of goods and services by the Government of Canada; and
- promote and provide support services for the marketing of Canadian goods, services and technology.

The regional offices of DI work directly with Canadian companies to promote industrial, scientific and technological development. They help clients recognize opportunities in a competitive international marketplace by providing services in the areas of business intelligence and information as well as trade and market development. DI also promotes and manages a portfolio of programs and services.

The following are areas in which DI regional offices have special competence:

- access to trade and technology intelligence and expertise;
- entry points to national and international networks;
- industry-sector knowledge base;
- co-location with International Trade Centres connected to DFAIT and Canadian posts abroad;
- client focus on emerging and threshold firms; and
- business intelligence.

For more information, call (613) 941-0222.

Business Service Centre
 Department of Industry
 235 Queen Street
 First Floor, East Tower
 Ottawa, ON K1A 0H5
 Tel.: (613) 952-4782
 Fax: (613) 957-7942

NAFTA Information Desk
 Department of Industry
 235 Queen Street
 Fifth Floor, East Tower
 Ottawa, ON K1A 0H5
 Fax: (613) 952-0540

THE BUSINESS OPPORTUNITIES SOURCING SYSTEM (BOSS)

BOSS is a computerized databank that profiles over 25,000 Canadian companies. It lists basic information on products, services and operations of use to potential customers. The system was established in 1980 by the Department of Industry (DI) in cooperation with participating provincial governments. BOSS was originally established so that trade commissioners posted around the world by DFAIT could find Canadian companies that might be able to take advantage of foreign market opportunities. Today, more than 11,000 domestic and international subscribers use the system, not only to locate Canadian suppliers, but also to obtain market intelligence and identify market opportunities. The majority of subscribers are Canadian companies. For more information, call (613) 954-5031.

MARKET INTELLIGENCE SERVICE (MIS)

MIS provides Canadian businesses with detailed market information on a product-specific basis. The service assists Canadian companies in the exploitation of domestic, export, technology transfer and new manufacturing investment opportunities. The intelligence is used by Canadian businesses in decisions regarding manufacturing, product development, marketing and market expansion. A request for information can be custom-tailored to meet each client's particular need. Previously-published customized reports are also available on request. The database is updated quarterly and annually. MIS is offered free of charge by fax, letter or telephone. For more information, contact:

Strategic Information Branch
 Department of Industry
 235 Queen Street
 First Floor, East Tower
 Ottawa, ON K1A 0H5
 Tel.: (613) 954-5031
 Fax: (613) 954-1894

REVENUE CANADA

Revenue Canada, Customs Program Branch provides a NAFTA Help Desk telephone line with service available in Spanish. Revenue Canada publications and customs notices are available by calling or faxing the NAFTA Information Desk. For more information, contact:

NAFTA Spanish Help Desk
Tel.: (613) 941-0965

NAFTA Information Desk
Revenue Canada, Customs Programs Branch
191 Laurier Avenue West
Sixth Floor
Ottawa, ON K1A 0L5
Tel.: 1-800-661-6121, or (613) 941-0965
Fax: (613) 952-0022

CANADIAN INTERNATIONAL DEVELOPMENT AGENCY (CIDA)

An important possible source of financing for Canadian ventures in Mexico is the special fund available through CIDA under the Industrial Cooperation Program (CIDA/INC). This program provides financial contributions to stimulate Canadian private-sector involvement in developing countries by supporting long-term business relationships such as joint ventures and licensing arrangements. INC supports the development of linkages with the private sector in Mexico by encouraging Canadian enterprises to share their skills and experiences with partners in Mexico and other countries. A series of INC mechanisms help enterprises to establish mutually beneficial collaborative arrangements for the transfer of technology and the creation of employment in Mexico.

There are five INC mechanisms that help eligible Canadian firms to conduct studies and that provide professional guidance and advice to potential clients. Where a project involves environmental improvement, technology transfer, developmental assistance to women, job training or job creation, early contact with CIDA's Industrial Cooperation Division is suggested. An important CIDA criterion is that the project creates jobs in Mexico without threatening jobs in Canada. In fact, most CIDA-assisted projects have produced net increases in Canadian jobs. For more information, contact:

Industrial Cooperation Division
Canadian International Development Agency
200 Promenade du Portage
Hull, PQ K1A 0G4
Tel.: (819) 997-7905/7906
Fax: (819) 953-5024

ATLANTIC CANADA OPPORTUNITIES AGENCY (ACOA)

Atlantic Canadian companies seeking to develop exports to Mexico may be eligible for assistance from the ACOA. The Agency works in partnership with entrepreneurs from the Atlantic region to promote self-sustaining economic activity in Atlantic Canada.

ACOA provides support to businesses as they look to expand existing markets through the development of marketing plans. Efforts include monitoring trade opportunities arising from global economic change, communications efforts to promote the region, trade missions and associated activities, as well as better coordination with federal and provincial bodies that influence trade and investment opportunities. For more information, contact:

Atlantic Canada Opportunities Agency
Blue Cross Centre
644 Main Street
P.O. Box 6051
Moncton, NB E1C 9J8
Tel.: 1-800-561-7862
Fax: (506) 851-7403

WESTERN ECONOMIC DIVERSIFICATION CANADA (WD)

WD is responsible for federal economic development activities in Western Canada. The Department works in partnership with the western provinces, business, industry associations and communities to stimulate the western Canadian economy.

WD's "New Directions" program will work to enhance the export position of western companies by boosting their competitiveness in domestic and global markets.

The Department no longer provides repayable loans to individual companies, but seeks new innovative partnerships within both the public and private sectors. These partnerships will address the needs of small- and medium-sized enterprises for information, business services and capital, particularly for high growth industries critical to Western Canada's economic diversification.

One of WD's new products focussed on export development is the International Trade Personnel Program. This federal-provincial initiative links export-focussed western firms with recent post-secondary graduates. The program accomplishes two important socio-economic goals: it gives companies the extra person-power they need to penetrate new markets, and it gives recent graduates valuable work experience. Under the new program, the length of export-development projects may vary from one to three years. Approved projects will be eligible for assistance ranging from C \$7,500 for one year, to a maximum of C \$37,500 per graduate over the 3-year period. For more information, contact:

Western Economic Diversification Canada
 The Cargill Building
 240 Graham Avenue
 Suite 712
 P.O. Box 777
 Winnipeg, MB R3C 2L4
 Tel.: (204) 983-4472
 Fax: (204) 983-4694

EXPORT DEVELOPMENT CORPORATION (EDC)

EDC is a customer-driven, financial services corporation dedicated to helping Canadian businesses succeed in the global marketplace. EDC provides a wide range of risk management services, including insurance, financing and guarantees to Canadian exporters and their customers around the world.

EDC's products fall into four main categories:

- export credit insurance, covering short- and medium-term credits;
- performance-related guarantees and insurance, providing cover for exporters and financial institutions against calls on various performance bonds and obligations normally issued either by banks or surety companies;
- foreign investment insurance, providing political risk protection for Canadian investments abroad; and
- export financing, providing medium- and long-term export financing to foreign buyers of Canadian goods and services.

EDC has established relationships with leading commercial and public sector institutions in Mexico and Latin America. Exporters can call (613) 598-2860 for more information.

Smaller exporters, with annual export sales under C \$1 million, should call the Emerging Exporter Team at 1-800-850-9626.

Exporters in the information technology sector can call EDC's Information Technologies Team at (613) 598-6891.

For information on the full range of EDC services, contact any of the following EDC offices:

Ottawa Export Development Corporation
 151 O'Connor Street
 Ottawa, ON K1A 1K3
 Tel.: (613) 598-2500
 Fax: (613) 237-2690

Vancouver Export Development Corporation
 One Bentall Centre
 505 Burrard Street
 Suite 1030
 Vancouver, BC V7X 1M5
 Tel.: (604) 666-6234
 Fax: (604) 666-7550

Calgary Export Development Corporation
 510-5th Street S.W.
 Suite 1030
 Calgary, AB T2P 3S2
 Tel.: (403) 292-6898
 Fax: (403) 292-6902

Winnipeg Export Development Corporation
**office also serves
 Saskatchewan*
 330 Portage Avenue
 Eighth Floor
 Winnipeg, MB R3C 0C4
 Tel.: (204) 983-5114
 Fax: (204) 983-2187

Toronto Export Development Corporation
 National Bank Building
 150 York Street
 Suite 810
 P.O. Box 810
 Toronto, ON M5H 3S5
 Tel.: (416) 973-6211
 Fax: (416) 862-1267

London Export Development Corporation
Talbot Centre
148 Fullarton Street
Suite 1512
London, ON N6A 5P3
Tel.: (519) 645-5828
Fax: (519) 645-5580

Montreal Export Development Corporation
Tour de la Bourse
800 Victoria Square
Suite 4520
P.O. Box 124
Montreal, PQ H4Z 1C3
Tel.: (514) 283-3013
Fax: (514) 878-9891

Halifax Export Development Corporation
Purdy's Wharf, Tower 2
1969 Upper Water Street
Suite 1410
Halifax, NS B3J 3R7
Tel.: (902) 429-0426
Fax: (902) 423-0881

NATIONAL RESEARCH COUNCIL (NRC)

Canadian companies hoping to succeed in the Mexican marketplace may require additional technology to improve their competitiveness. The NRC works with Canadian firms of all sizes to develop and apply technology for economic benefit. The Council manages the Industrial Research Assistance Program (IRAP), a national network for the diffusion and transfer of technology.

The IRAP network supports the process of developing, accessing, acquiring, implanting and using technology throughout Canadian industry. IRAP has been in existence for 50 years and has acquired a reputation as one of the most flexible and effective federal programs. IRAP takes advantage of an extensive network of more than 190 different locations within approximately 90 communities across Canada, including numerous provincial technology centres, the NRC's own laboratories and research institutes, federal government departments, and technology transfer offices in Canadian universities. For further information, contact:

Industrial Research Assistance Program
National Research Council
Montreal Road
Building M-55
Ottawa, ON K1A 0R6
Tel.: (613) 993-1770
Fax: (613) 952-1086

KEY CONTACTS IN CANADA

SPONSORING ORGANIZATIONS

BAKER & MCKENZIE

Baker & McKenzie is one of the largest international law firms with offices in 35 countries. They presently have four offices in Mexico, in the cities of Juárez, Mexico City, Monterrey and Tijuana. In addition to providing legal advice, the firm's offices in Canada and Mexico work to assist Canadian companies to find the right partner to enable them to establish or expand their activities in Mexico. For more information, contact:

Baker & McKenzie
Barristers & Solicitors
BCE Place
181 Bay Street
Suite 2100
Toronto, ON M5J 2T3
Tel.: (416) 865-6910/6903
Fax: (416) 863-6275

BUSINESS AND PROFESSIONAL ASSOCIATIONS

Canadian Council of Ministers of Education
252 Bloor Street West
Suite 5-200
Toronto, ON K5S 1V5
Tel.: (416) 964-2551
Fax: (416) 964-2296

Association of Universities and Colleges of Canada (AUCC)
350 Albert Street
Suite 600
Ottawa, ON K1R 1B1
Tel.: (613) 563-1236
Fax: (613) 563-9745

Canada-Mexico Cultural Exchange Centre
c/o Ontario Institute for Studies in Education (OISE)
University of Toronto
252 Bloor Street West
Toronto, ON M5S 1V6
Tel.: (416) 977-3577
Fax: (416) 977-3577

**Inter-American Distance Education Consortium
(CREAD)**

c/o Office of International Cooperation
Télé-Université
1001 Sherbrooke Street
Fourth Floor
Montreal, PQ H2X 3M4
Tel.: (514) 522-3540
Fax: (514) 522-3608

**Inter-American Distance Education Consortium
(CREAD)**

c/o Centre for Distance Education
Simon Fraser University
Burnaby, BC V5A 1S6
Tel.: (604) 291-4269
Fax: (604) 291-4964

Canadian Council for the Americas (CCA)

The Council is a non-profit organization formed in 1987 to promote business interests in Latin American as well as Caribbean countries. The CCA promotes events and programs targetted at expanding business and building networking contacts between Canada and the countries of the region.

The Canadian Council for the Americas

Executive Offices
360 Bay Street
Suite 300
Toronto, ON M5H 2V6
Tel.: (416) 367-4313
Fax: (416) 367-5460

Canadian Exporters' Association

99 Bank Street
Suite 250
Ottawa, ON K1P 6B9
Tel.: (613) 238-8888
Fax: (613) 563-9218

Canadian Manufacturers' Association

75 International Boulevard
Fourth Floor
Etobicoke, ON M9W 6L9
Tel.: (416) 798-8000
Fax: (416) 798-8050

The Canadian Chamber of Commerce

55 Metcalfe Street
Suite 1160
Ottawa, ON K1P 6N4
Tel.: (613) 238-4000
Fax: (613) 238-7643

Forum for International Trade Training Inc.

155 Queen Street
Suite 608
Ottawa, ON K1P 6L1
Tel.: (613) 230-3553
Fax: (613) 230-6808

Language Information Centre

240 Sparks Street RPO
Box 55011
Ottawa, ON K1P 1A1
Tel.: (613) 523-3510

Open Bidding Service

P.O. Box 22011
Ottawa, ON K1V 0W2
Tel.: 1-800-361-4637 or (613) 737-3374
Fax: (613) 737-3643

Canadian Standards Association

178 Réxdale Boulevard.
Etobicoke, ON M9W 1R3
Tel.: (416) 747-4000
Fax: (416) 747-4149

Standards Council of Canada

45 O'Connor Street
Suite 1200
Ottawa, ON K1P 6N7
Tel.: (613) 238-3222
Fax: (613) 995-4564

MEXICAN GOVERNMENT OFFICES IN CANADA

The Embassy of Mexico and Mexican consulates can provide assistance and guidance to Canadian companies in need of information about doing business in Mexico. For more information, contact:

Embassy of Mexico
45 O'Connor Street
Suite 1500
Ottawa, ON K1P 1A4
Tel.: (613) 233-8988
Fax: (613) 235-9123

Mexican Consulate in Ottawa
45 O'Connor Street
Suite 1500
Ottawa, ON K1P 1A4
Tel.: (613) 233-6665
Fax: (613) 235-9123

OTHER MEXICAN CONSULATES GENERAL IN CANADA

Consulate General of Mexico
2000 Mansfield Street
Suite 1015
Montreal, PQ H3A 2Z7
Tel.: (514) 288-2502/4916
Fax: (514) 288-8287

Consulate General of Mexico
199 Bay Street
Suite 4440
P.O. Box 266, Station Commerce Court West
Toronto, ON M5L 1E9
Tel.: (416) 368-2875/8141/1847
Fax: (416) 368-8342

Consulate General of Mexico
1139 West Pender Street
Suite 810
Vancouver, BC V6E 4A4
Tel.: (604) 684-3547/1859
Fax: (604) 684-2485

MEXICAN FOREIGN TRADE COMMISSIONS

Banco Nacional de Comercio Exterior (Bancomext) is the Mexican Foreign Trade Commission and has offices in Canada. It offers credits, export guarantees and counselling services to Mexican companies seeking to do business in Canada.

MEXICAN BANKS WITH OFFICES IN CANADA

Banco Nacional de México (Banamex), *Banco de Comercio (Bancomer)*, and *Banca Serfin* are private-sector banks which offer specialized services through their international trade information centres. The centres participate in a computerized communications network with access to numerous economic, governmental and financial databases throughout the world. These banks are located throughout Mexico and maintain offices in Toronto.

Banco Nacional de México (Banamex)
1 First Canadian Place
Suite 3430
P.O. Box 299
Toronto, ON M5X 1C9
Tel.: (416) 368-1399
Fax: (416) 367-2543

Banco de Comercio (Bancomer)
The Royal Bank Plaza
South Tower
Suite 2915
P.O. Box 96
Toronto, ON M5J 2J2
Tel.: (416) 956-4911
Fax: (416) 956-4914

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