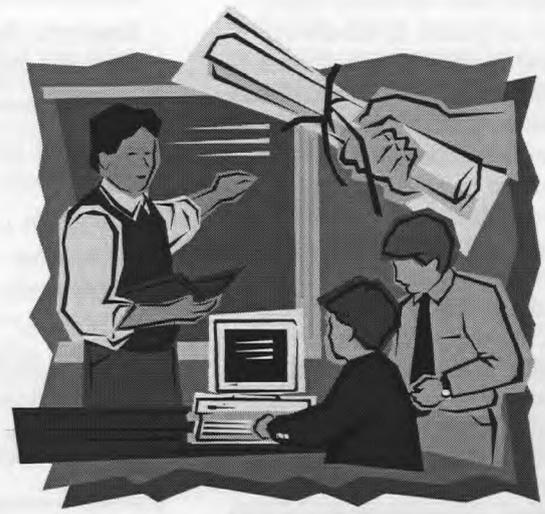


Educational Services



THE OPPORTUNITY

Mexico offers substantial opportunities for Canadian suppliers of education and training services.

- Mexico's population of 100 million is growing at more than 2 percent per year, half of whom are under 20 years old. The labour force is growing faster than the population.
- Only about 20 percent of Mexican students complete high school, and there are less than 1.5 million university students.
- The government is trying to improve quality and reduce the drop-out rate, especially at the primary school level.
- Rapid industrial restructuring is creating unprecedented demands for business, language and technical skills.
- Canada enjoys a reputation for educational excellence, and is also considered a good place to come to study because of social and cultural reasons.

MEXICO'S SKILLS CRISIS

Mexico's population of about 100 million is growing at the rate of more than 2 percent per year. Half of all Mexicans are under 20 years old, and almost three-quarters are 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.

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.

These reforms brought about a massive restructuring of Mexican industry, as producers scrambled to modernize to meet the influx of foreign competition. 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.

These trends have multiplied the demand for skills and overtaxed Mexico's underdeveloped education and training institutions. 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.

SUMMARY REPORT

In addition to this market summary, the Department of Foreign Affairs and International Trade (DFAIT) has prepared a market profile entitled **Opportunities in Mexico: Educational Services**. This market information on Mexican educational services has been produced and published by Prospectus Inc. under contract with DFAIT, along with other market profiles and summaries on business opportunities in Mexico. It is available from:

InfoCentre
 Tel.: 1-800-267-8376 or (613) 944-4000
 Fax: (613) 996-9709
 FaxLink: (613) 944-4500
 Bulletin Board (IBB): 1-800-628-1581 or (613) 944-1581

The market profiles are available in electronic form from the IBB and in hard copy at a cost of \$10.00 plus shipping and applicable taxes, from Prospectus Inc. Please contact:

Prospectus Inc. Order Department
 Tel.: (613) 231-2727
 Fax: (613) 237-7666

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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.

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

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 system of free public education extends to the high school level. Educational institutions are classified as federal, state, autonomous or private. Autonomous schools are public institutions with discretionary spending authority. Spending on public education was 5.2 percent of gross domestic product (GDP) in

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.

1993, and is projected to increase to 8 percent by 2000.

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 calls for the enrollment of an additional 600,000 pre-school students. It also acknowledges the need to increase the nation's very low primary school completion rate and to absorb one million new secondary students into the school system.

THE PUBLIC AND PRIVATE SCHOOL SYSTEMS

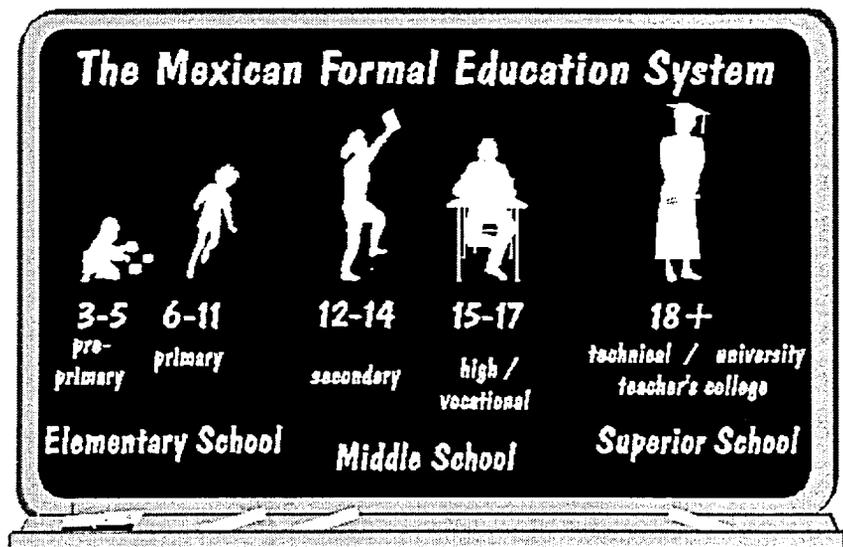
About 24 million students are registered in the public and private school systems, up to the secondary school level but excluding vocational training. More than three-quarters of them attend state institutions. The rest are enrolled in federal, autonomous or private schools.

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 mid-level technical schools called *Profesional Medio*.

All public schools are free and secular. Primary education has long been mandatory in Mexico, and 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 de Escuelas Particulares (ANEP)*, National Association of Private Schools. They cater mainly to affluent Mexicans.

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. Total enrollment in higher education institutions was about 1.4 million during the 1994 to 1995 school year.

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.

Private institutions tend to be the most prestigious. 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.

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 pesos per year at the *Universidad Autónoma Metropolitana (UAM)*, Autonomous University of Mexico. 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 pesos to almost \$30,000 pesos.

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 masters degree and 11 doctorate programs.

There are also a number of private technical institutes that are not part of the *SNET*. In general, the private institutes concentrate on degree programs and do not offer industrial or high school training as do the public institutes.

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. 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.

FOREIGN TRADE

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.

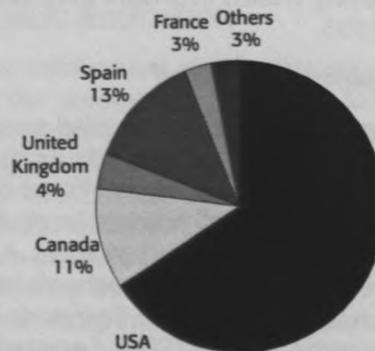
The best data are for Mexican degree students studying abroad. In 1994, there were officially about 14,000 of them. The number fell by 28 percent in 1995 as a result of the severe crisis precipitated by the devaluation of the peso in December 1994. It is estimated that 1994 levels will be restored early in the next century.

The United States is the most important destination for degree students who study abroad. Canada 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

Mexican Degree Students Abroad



Source: Institute for International Education (IIE), and the Canadian Embassy.

Dept. of External Affairs
Min. of Education

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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.

CUSTOMERS

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. 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 quality and reducing dropout rates.

UNIVERSITIES AND TECHNICAL INSTITUTIONS

Higher education in Mexico is provided by universities and technical institutes. 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 since 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.

INDIVIDUAL LEARNERS

Many decisions regarding the purchase of educational services are made by individual learners or their families. 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.

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 post graduate degrees. About 70 percent of Mexicans pursuing degrees abroad are engaged in graduate studies.

Language Training

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. FSL schools are less common, with an estimated 3,500 students studying French in private programs in 1995.

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. Individual business training is concentrated in accounting, basic management and

tourism management, as well as computer and communications skills.

COMPETITORS

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. 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.

MEXICAN UNIVERSITIES

Mexico has more than 1,300 universities, but the total enrollment is less than 1.5 million. The principal domestic competitors for Canadian universities are the private universities. There are 85 private universities in Mexico, but 12 of them account for about two thirds of the market.

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. There are 73 public technical institutes administered by the *Dirección General de Institutos Tecnológicos (DGIT)*, Executive Administrative Office of Technological Institutes.

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.

Canada enjoys a number of competitive advantages. 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 U.S. and Mexico in this regard. For any given quality level, Canadian universities are also lower-cost. Canadian visas are considered more accessible and this is regarded as a competitive advantage by some students.

LANGUAGE SCHOOLS

The language training market is dominated by about a dozen firms. Many of them are affiliates of large international organizations. 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 Mexican ESL schools. The most important schools include Interlingua, Berlitz and Quick Learning.

BUSINESS SKILLS SCHOOLS

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. 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.

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.

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 devaluation of the peso in December 1994 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. To take advantage of this export boom, many Mexican companies have been forced to modernize to meet international quality standards. 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 that 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.

During the term of former President Carlos Salinas, the *Solidaridad* program was the major source of funding both

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

INDUSTRIAL TRAINING

The need for improved industrial training to help Mexico adapt to a liberalized trade environment has been recognized by the government. President Zedillo's *Plan Nacional de Desarrollo (PND)*, National Development 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.

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 U.S. 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. One of the objectives of the program is to develop practical partnering techniques.

Several other groups are working to improve academic mobility within the North American Free Trade Agreement (NAFTA) countries. 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 that the market for ESL and 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 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. Canadian companies setting up operations in Mexico will encounter stiff competition from established computer schools. Advanced teaching methods and customized services can help to meet this competition.

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. The costs of installing distance education infrastructure is a major obstacle to the realization of these goals. Many Mexican universities and corporations cannot afford the US \$500,000 installation costs involved. Cultural barriers

also stand in the way of expanding distance education systems. Eventually, considerations of cost and efficiency are likely to overcome these obstacles.

THE REGULATORY ENVIRONMENT

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 will 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. 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. Mexican students studying in Canada must obtain a student visa if they will be engaged in full-time study for more than 90 days. Students studying for less than three months need a 90-day visitor's visa.

MARKET ENTRY STRATEGIES

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

Training centres are operated by a variety of *cámaras*, industrial chambers of commerce, and by other business associations. Some of them engage outside consultants to help develop their programs, and they can also direct suppliers to companies with active training programs.

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 centers in Mexico: the Canadian Embassy Library and the Institute of International Education (IIE). Both report that their information from Canadian universities is very limited.

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, American 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. 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.

FINANCIAL ASSISTANCE

Graduate students are more likely than undergraduates to receive financial assistance from the host university. Particularly since the devaluation of the peso in December 1994, 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 communications links between educators in Canada, Mexico and the United States. For example, a list server called CANALA-L (canalal@cunews.carleton.ca) is operated by the Canadian Bureau for International Education (CBIE) with financial assistance from the Canadian International Development Agency (CIDA).

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 establish course equivalencies and focus their 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. 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.

KEY CONTACTS

CANADA

Canadian Government

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):
Tel.: 1-800-628-1581 or
(613) 944-1581

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

The Trade and Economic Division of the Embassy of Canada in Mexico can provide vital assistance to Canadians venturing into the Mexican market. The trade commissioners are well-

informed about the market and will respond in whatever measures possible to support a Canadian firm's presence in Mexico.

Note: to telephone Mexico City, dial: 011-52-5 before the number shown. For contacts in other cities in Mexico, consult the international code listing at the front of your local telephone directory for the appropriate regional codes.

Trade and Economic Division
The Embassy of Canada in Mexico
Schiller No. 529
Col. Polanco
Apartado Postal 105-05
11560 México, D.F.
México
Tel.: 724-7900
Fax: 724-7982

Canadian Consulate
Edificio Kalos, Piso C-1
Local 108-A
Zaragoza y Constitución
64000 Monterrey, Nuevo León
México
Tel.: 344-3200
Fax: 344-3048

Canadian Consulate
Hotel Fiesta Americana
Local 30-A
Aurelio Aceves No. 225
Col. Vallarta Poniente
44110 Guadalajara, Jalisco
México
Tel.: 616-6215
Fax: 615-8665

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.

World Information Network for 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.

International financing institutions, including the World Bank and the Inter-American Development Bank, provide funds to Mexico for a wide variety of specific projects. DFAIT helps Canadian exporters interested in pursuing multilateral business opportunities that are financed by international financing institutions. For further information, call (613) 995-7251, or fax (613) 943-1100.

Market Intelligence Service (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. MIS is offered free of charge by fax, letter or telephone. For more information, call (613) 954-5031, or fax (613) 954-2340.

Human Resources Development Canada (HRDC)

Occupational and Career Development Division
Human Resources Development Canada
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 intel-

ligence 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 customized 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

Canadian International Development Agency (CIDA)

CIDA is an important possible source of financing for Canadian ventures in Mexico. A special fund is available through the 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. For more information, call (819) 997-7905/7906, or fax (819) 953-5024.

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 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 industry can call EDC's Information Technologies Team at (613) 598-6891. For information on the full range of EDC services, call (613) 598-2500, or fax (613) 237-2690.

Revenue Canada

Revenue Canada, Customs Program Branch provides a NAFTA Help Desk telephone line with service available in Spanish. For information, call (613) 941-0965.

Sponsoring Organizations

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)

600-350 Albert Street
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 rue Sherbrooke, 4ième étage
Montreal, Quebec 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, B.C. V5A 1S6
Tel.: (604) 291-4269
Fax: (604) 291-4964

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 and 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

Canadian Standards Association

178 Rexdale Blvd.
Rexdale, 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 Embassy in Canada

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

MEXICO

Secretariat of Public Education

Secretaría de Educación Pública (SEP)
Argentina No. 28, Piso 2
Col. Centro
06029 México, D.F.
México
Tel.: 510-2557, 512-0358, 328-1000/1067
Fax: 518-4350, 5218293

Secretariat of Labour and Social Welfare

Secretaría del Trabajo y Previsión Social (STPS)
Periférico Sur No. 4271, Edificio A
Col. Fuentes del Pedregal
14140 México, D.F.
México
Tel.: 645-3715/5466
Fax: 645-2595

Secretariat of Social Development

Secretaría de Desarrollo Social (SEDESOL)
Programas de Solidaridad
Insurgentes Sur No. 1480, Piso 8
Col. Barrio Actipan
México, D.F.
México
Tel.: 534-7543 / 7617
Fax.: 524-9866

Programa de Desarrollo Educativo 1995-2000

Descartes No. 6, Piso 5
Col. Nueva Anzures
11590 México, D.F.
México
Tel.: 545-7898
Fax: 254-6482

Secretariat of Communication and Transportation

Secretaría de Comunicaciones y Transportes (SCT)
Satélites Solidaridad (Sct Telecom)
Municipio Libre 377
Col. Santa Cruz Atoyac
México, D.F.
México
Tel.: 688-9224/6052
Fax: 688-8349

National Oil Company

Petróleos Mexicanos (PEMEX)
Av. Marina Nacional No. 329
Col. Huasteca
11311 México, D.F.
México
Tel.: 725-2200, 250-2611
Fax: 625-4385

Institute of International Education (IIE)

Londres No. 16, Piso 2
06600 México, D.F.
México
Tel.: 703-0167, 211-0042 ext. 3500, 3510
Fax: 703-0167, 211-0042 ext. 3500, 3510 (request fax tone)

National Union of Language Schools

Union Nacional de Escuelas de Idiomas (UNEI)
Insurgentes Sur No. 1971
Col. Guadalupe Inn
01020 México, D.F.
México
Tel.: 661-3301, 663-2370
Fax: 661-3301

National Technological Education System

Sistema Nacional de Educación Tecnológica (SNET)
Centeno No. 670
Col. Granjas México
08400 México, D. F.
México
Tel.: 650-3110
Fax: 658-6872

Mexican Education Centres Operated by SNET

Dirección General De Centros de Formación para el Trabajo (DGCFT)
Centeno No. 670
Col. Granjas México
08400 México, D.F.
México
Tel.: 650-3110
Fax: 658-6872

Colegio Nacional de Educación Profesional Tecnológica (CONALEP)

Centeno No. 670
Col. Granjas México
08400 México, D.F.
México
Tel.: 650-3110
Fax: 658-6872

Centro de Enseñanza Técnica Industrial (CETI)

Centeno No. 670
Col. Granjas México
08400 México, D.F.
México
Tel.: 650-3110
Fax: 658-6872

Unidad de Educación en Ciencia y Tecnología del Mar (UECyTM)

Centeno No. 670
Col. Granjas México
08400 México, D.F.
México
Tel.: 650-3110
Fax: 658-6872

Executive Administrative Office of Technological Institutes

Dirección General de Institutos Tecnológicos (DGIT)

Centeno No. 670
Col. Granjas México
08400 México, D.F.
México
Tel.: 650-3110
Fax: 658-6872

Organismos Descentralizados de los Gobiernos de Los Estados (ODE)

Centeno No. 670
Col. Granjas México
08400 México, D.F.
México
Tel.: 650-3110
Fax: 658-6872

Instituto Politécnico Nacional (IPN)

Luis Enrique Erro and Juan de Dios Bâtiz
Col. Zacatenco
07738 México, D.F.
México
Tel.: 729-6000, ext. 51817

Centro de Investigación y Estudios Avanzados del IPN (CIEA-IPN)

Av. Instituto Politécnico Nacional No. 2508
Col. San Pedro Zacatenco
07300 México, D.F.
México
Tel.: 747-7000
Fax: 747-7093

Development Banks

The World Bank Group

Washington, D.C. 20433
U.S.A.
Tel.: (202) 477-1234
Fax: (202) 477-8391

Inter-American Development Bank

Banco Inter-Americano de Desarrollo
Av. Horacio No. 1855, Piso 6
Col. Morales Polanco
11510 México, D.F.
México
Tel.: 580-0182/1863

Business and Professional Organizations

National Association of Private Schools

Asociación Nacional de Escuelas Particulares (ANEP)
José Ma. Lafragua No. 3, Piso 10
Col. Tabacalera
06030 México, D.F.
México
Tel.: 512-4438/8080
Fax: 535-9716

National Association of Universities and Higher Education Institutions

Asociación Nacional de Universidades e Instituciones de Educación Superior (ANUIES)
Tenayuca No. 200
Col. Santa Cruz Atoc
03310 México, D.F.
México
Tel.: 604-3734
Fax: 604-4263

Mexican Association for International Education

Asociación Mexicana para la Educación Internacional
c/o University of Guadalajara
Joseline Gazelle Davila
Tomas V. Gomez No. 125
Col. Ladrón de Guevarra
44600 Guadalajara, Jalisco
México
Tel.: 616-4382
Fax: 616-3982

Mexican Association of Personnel Training

Asociación Mexicana de Capacitación de Personal (AMECAP)
Río Lerma No. 95
Col. Cuauhtemoc
06500 México, D.F.
México
Tel.: 208-2483, 533-1375
Fax: 514-7066

National Council for the Promotion of Education

Consejo Nacional de Fomento Educativo (CONAFE)
Av. Homero No. 203, Piso 1
Col. Chapultepec Morales
11570 México, D.F.
México
Tel.: 254-8689
Fax: 250-3144

Inter-American Distance Education Consortium (CREAD)

c/o Division of Open and Distance Education
University of Guadalajara
Av. Patria 1202
Lomas del Valle 3era sec.
44100 Zapopan, Jalisco
México
Tel.: 825-5215
Fax: 616-4314

Mexico's Largest Public Universities

National Autonomous University of Mexico

Universidad Nacional Autónoma de México (UNAM)
Ciudad Universitaria
Lado Sur Zona Cultural de Ciudad Universitaria
04510 México, D.F.
México
Tel.: 622-6684
Fax: 665-0943

Autonomous University of Mexico City

Universidad Autónoma Metropolitana (UAM)
Blvd. Manuel Ávila Camacho No. 90
Col. El Parque
53390 Naucalpan, Estado de México
México
Tel.: 576-3178/3310/7900
Fax: 576-6888

Universidad Autónoma de Guadalajara (UAG)

Av. Patria No. 1201
Col. Lomas del Valle
44101 Guadalajara, Jalisco
México
Tel.: 641-3670
Fax: 642-5427

Universidad Autónoma de Chihuahua

Escorza and Venustiano Carranza
Col. Centro
31000 Chihuahua, Chihuahua
México
Tel.: 15-2722/2417, 16-2443
Fax: 10-1177



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Universidad Autónoma de Nuevo León

Ciudad Universitaria
Torre de Rectoría
Nicolás de los Garza
6400 Monterrey, Nuevo León
México
Tel.: 352-1452, 376-4140
Fax: 376-7757

Universidad Autónoma de Chapingo

Carretera México-Texcoco-Chapingo
Km. 38.5
56230 Chapingo
Estado de México
México
Tel.: 4-2200/0035
Fax: 4-5066

Universidad Pedagógica Nacional

Carretera Ajusco No. 24
Col. Héroes de Padierna
14200 México, D.F.
México
Tel.: 645-4010/1342
Fax: 645-5340/6965

Universidad Autónoma de Puebla

4 Sur No. 104
Col. Centro
72000 Puebla, Puebla
México
Tel.: 46-8111/4078
Fax: 32-3269

Universidad Autónoma de Sonora

Bldv. Rosales y Transversal
Col. Centro
Apdo. Postal 106
8300 Hermosillo, Sonora
México
Tel./Fax: 17-3181 (request the
information by fax)

Universidad Autónoma de Oaxaca

Av. Universidad s/n
Edificio de Rectoría
Ciudad Universitaria
68120 Oaxaca, Oaxaca
México
Tel.: 6-5922/5783/5843

Mexico's Largest Private Universities

Universidad de las Américas (UDLA)

Puebla No. 223
Col. Roma
México, D.F.
México
Tel.: 525-4633, 207-6142

Universidad del Valle de México (UVM)

Sadi Carnot No. 57
Col. San Rafael
06070 México, D.F.
México
Tel.: 705-3263, 535-0041
Fax: 705-2325/2700

Universidad Iberoamericana

Prolongación Paseo de la Reforma
No. 880
Col. Lomas de Santa Fe
01210 México, D.F.
México
Tel.: 726-9048, 292-2633/0133

Universidad Tecnológica de México

Marina Nacional No. 162
Col. Anahuac
11320 México, D.F.
México
Tel.: 396-6088, ext. 1305
Fax: 396-6088, ext. 1303

Universidad de Guadalajara (UdeG)

Av. Juárez No. 976
Sector Juárez
44100 Guadalajara, Jalisco
México
Tel.: 825-0370
Fax: 825-6923

Universidad de Monterrey (UdeM)

Morones Prieto No. 4500
66238 San Pedro Garza García
Nuevo León
México
Tel.: 338-0147
Fax: 338-5619

Universidad Anáhuac

Av. de las Torres No. 131
Col. Olivar de los Padres
01780 México, D.F.
México
Tel.: 627-0210, ext. 143
Fax: 628-8837

Universidad La Salle (ULSA)

Benjamin Franklin No. 47
06140 México, D.F.
México
Tel.: 516-9960/9969
Fax: 271-8585

Universidad Regiomontana

Villagran No. 238 Sur
64000 Monterrey, Nuevo León
México
Tel.: 342-5290
Fax: 340-0402

Universidad del Valle de Atemajac (UNIVA)

Av. Tepec No. 4800
Col. Prados Tepec
45050 Guadalajara, Jalisco
México
Tel.: 628-2817
Fax: 628-6273

Universidad del Bajío

Av. Universidad s/n
Col. Lomas Campestre
León, Guanajuato
México
Tel.: 17-1707
Fax: 17-1707 (request fax tone)

Universidad Intercontinental (UIC)

Insurgentes Sur No. 4135
Col. Tlalpan
14000 México, D.F.
México
Tel.: 573-8544
Fax: 513-0049

Mexican Technical Institutes

Monterrey Technical Institute

Instituto Tecnológico de Estudios Superiores de Monterrey (ITESM)
Fray Servando Teresa de Mier No. 99
Col. Centro
México, D.F.
México
Tel.: 761-4096

Autonomous Institute of Technology

Instituto Tecnológico Autónomo de México (ITAM)
Río Hondo No. 1
Col. Tizapan San Ángel
01000 México, D.F.
México
Tel.: 550-9300
Fax: 616-0616

Instituto Tecnológico de Estudios Superiores de Occidente (ITESO)

Periférico Sur No. 8585
45090 Tlaquepaque, Jalisco
México
Tel.: 669-3540
Fax: 669-3434

Instituto Tecnológico de Sonora

5 de Febrero No. 818 Sur
Apartamentop 541
8500 Hermosillo, Sonora
México
Tel.: 17-0491
Fax: 17-0731

Mexican Computer Schools

ICM

Lucerna No. 82, Piso 6
Col. Juárez
México, D.F.
México
Tel.: 566-6500, 592-6815
Fax: 546-5507

Instituto Flemming

Niza No. 62
Col. Juárez
06600 México, D.F.
México
Tel.: 207-0906
Fax: 207-0906 (request fax tone)

Major Mexican Language Schools

Interlingua

Génova No. 33, Piso 8
Col. Juárez
03600 México, D.F.
México
Tel.: 208-1919
Fax: 207-4157

Angloamericano

Campos Eliseos No. 111
Col. Polanco
México, D.F.
México
Tel.: 531-8940/9354

Quick Learning

Andrés Molina Enriquez No. 4231
Col. Viaducto Piedad
08200 México, D.F.
México
Tel.: 538-6510/6511/6512
Fax: 538-9370

Instituto Anglo Mexicano de Cultura, A.C.

Antonio Caso No. 127
Col. San Rafael
06700 México, D.F.
México
Tel.: 566-4500
Fax: 566-6739

Glenn International

Viena No. 71-301
Col. del Carmen Coyoacán
04100 México, D.F.
México
Tel.: 659-3774
Fax: 659-3533

Berlitz

Ejercito Nacional No. 530, Piso 2
Col. Polanco
México, D.F.
México
Tel.: 563-2652
Fax: 255-3817

Coronel Hall

Colima No. 159
Col. Roma
06700 México, D.F.
México
Tel.: 514-2821
Fax: 533-3183

Instituto Superior de Interpretes y Traductores

Río Rhin No. 40
Col. Cuauhtemoc
06500 México, D.F.
México
Tel.: 566-7722/8203
Fax: 591-1808

Hammer Sharp Institute

Instituto Hammer Sharp
Insurgentes Sur No. 1971
Col. Guadalupe Inn
01020 México, D.F.
México
Tel.: 661-3301, 663-2370
Fax: 661-3301 (request fax tone)

Centre for Foreign Language Studies at UNAM

Centro de Enseñanza de Lenguas Extranjeras de la UNAM (CELE)
Circuito Interior, Ciudad Universitaria
04510 México, D.F.
México
Tel.: 622-0650
Fax: 550-3008

Mexican Companies

Asesoría en Calidad y Competitividad (ACC)
Insurgentes Sur 1915-1102
Col. Guadalupe Inn
01020 México D.F.
México
Tel.: 661-3905/3908
Fax.: 661-3905/3908 (request fax tone)

**Siliceo y Asociados
c/o Asesoría en Calidad y Competitividad (ACC)**

Insurgentes Sur 1915-1102
Col. Guadalupe Inn
01020 México D.F.
México
Tel.: 661-3905/3908
Fax: 661-3905/3908 (request fax tone)

Workplace Training Centres

Centros de Capacitación para el Trabajo (CECATIS)
Centeno No. 670
Col. Granjas México
08400 México, D.F.
México
Tel.: 650-3110
Fax: 658-6872

Vocational Training Centres

Centros de Bachillerato Técnico Industrial y de Servicios (CBTIS)
Centeno No. 670
Col. Granjas México
08400 México, D.F.
México
Tel.: 650-3110
Fax: 658-6872

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