

Tuition Fees for International Students in Sweden – An Analysis of Policy Changes and Institutional Responses

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IMPRESSUM

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TERMINOLOGY AND ABBREVIATIONS

| | |
|---------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Admissions process | The process which leads to the admission or rejection of an applicant to a higher education institution. Includes submission, review and notification processes |
| Admissions system | The system responsible for the admissions process. This can be at an institutional level, a national/region level or a combination of the two |
| Exchange students | A student who is studying at another institution for a fixed period of time |
| Free movers | Cross-border students who pay for their education through private funding (e.g. parents) |
| HSV | <i>Högskoleverket</i> , The Swedish National Agency for Higher Education |
| Non-EEA | Outside the European Economic Area and Switzerland |
| YoY | Year-over-year |
| VHS | <i>Verket för högskoleservice</i> , Swedish Agency for Higher Education Services |

EXECUTIVE SUMMARY

Tuition fees in higher education are not a new phenomenon but one which has drawn particular attention in recent years as tuition fee increases have sparked widespread political and philosophical debate. Debates about tuition fees in higher education do not only focus on the cost, but also on who should bear the burden of that cost – the student, his/her family, or society. A country's policies regarding tuition fees, therefore, reflect not only economic, political, and market-driven considerations, but also cultural ones.

Historically, the Nordic welfare states – Sweden, Denmark, Norway and Finland – have provided tuition-free higher education to all students, regardless of their nationality. In 2006, however, Denmark introduced tuition fees for non-EEA (students outside the European Union and Switzerland). Finland has also introduced a tuition fee “trial period” for 133 of its English language master's degree programs between 2010-2015. And from the fall of 2011 onwards, non-EEA students studying at Swedish higher education institutions will have to pay tuition fees as stipulated by the government bill entitled “Competing on the basis of quality – tuition fees for foreign students”.

The introduction of tuition fees in Nordic countries marks a significant departure from the previous tuition-free paradigm in which the region has operated. To inform the decision-making of policy makers in countries which are introducing tuition fees or who are currently tuition-free destinations, this thesis will take an in-depth look at the first 14 months following the introduction of tuition fees in Sweden through both national and institutional perspectives – including a case study of the introduction of tuition fees at one of Sweden's leading research universities, Lund University. Situational snapshots of Denmark, Finland, and Norway's internationalization profile and tuition fee policies are included for both comparison as well as to highlight regional dynamics driven by emerging national policies.

For policy and decision makers at both national and institutional levels, the findings incorporated in this descriptive and analytical work highlight the influence of broader characteristics of a national higher education framework – organizational design, change incentives and cultural underpinnings – in aligning national policy and institutional direction. Furthermore, the extensive documentation of issues triggered by the introduction of fees and the responses undertaken at the institutional level, serve to underscore the complexity of tuition fee policies and their implementation.

INTRODUCTION

From the fall of 2011 onwards, non-EEA students (students from outside the European Economic Area or Switzerland) studying at Swedish higher education institutions will have to pay tuition fees. The Swedish government's decision to introduce tuition fees for these students marks a significant departure from Sweden's past practice of free higher education for all students, regardless of nationality. This change has implications not only for the institutions who offer higher education to non-EEA students but also for Swedish international education as a whole.

The purpose of this thesis is to examine Sweden's introduction and initial implementation of tuition fees for non-EEA students while providing a broader regional and global perspective on tuition fee policies. It will look at the major higher education legislation preceding the tuition fee bill, and also try to examine the way in which actors in the Swedish system of higher education have been affected. Furthermore the thesis will try and highlight the major issues triggered by the introduction of tuition fees and by using a case study, look at the responses to these issues undertaken by some institutions.

The paper is divided into the following five parts:

- The paper will begin first by looking at the larger policy framework surrounding the introduction of fees in Sweden. This will include a global perspective on tuition fee policy practices in various national settings as well as an overview of higher education and internationalization in Sweden.
- The second part of the paper will examine the introduction of the tuition fee legislation. This section will outline the legislation building up to the tuition fee bill as well as the bill itself.
- The third part of the paper will look broadly at the policy effects that have transpired thus far through three sections. The first section will outline various actors within Swedish higher education and challenges they are facing as a result of the introduction of fees. The second section will outline national and cross-cutting institutional issues experienced since the introduction of fees. The third section will provide a close-up of one institution's responses through a case study on Lund University.
- The fourth part of the paper will present a Nordic perspective on tuition fees. Given the geographical, historical and linguistic similarities of the region as well as the regional dynamics of student recruitment, this section will outline higher education in Denmark, Finland, and Norway with a view on tuition fees and internationalization policies going forward.
- The final part of the paper will provide some policy perspectives on the implementation of tuition fees thus far as well as policy perspectives for

Swedish leaders at both the institutional and governmental levels going forward.

Through the structure described above, this thesis seeks to highlight the interplay between national policy and institutional reactions regarding tuition fees in Sweden's historically nationally-driven higher education system. The broader perspectives on the implementation of tuition fee policies aims to inform policy and decision makers on a number of considerations which are triggered through tuition fee policy changes. In particular, how the relationship between national policy and institutional action can subsequently affect institutions' ability to compete in the global higher education landscape.

POLICY FRAMEWORK

Introduction

This section will seek to introduce the context of the introduction of tuition fees in Sweden by providing both a broader global perspective on tuition fee policies as well as an outline of Swedish higher education. The first section will examine how national frameworks, which include historical, cultural and financial particularities, shape the existence and extent of tuition fees within a high education system. The second section will provide an overview of the Swedish higher education system, including a perspective on international students and English language master degree programs.

Tuition Fees from a Global Perspective

The Influence of National Frameworks

Tuition fees in higher education are not a new phenomenon but one which has gained significant attention in recent years due to near continuous increases (The College Board, 2010; Altbach et. al., 2009). The reasons for the upward trend in tuition fees are multifold but are connected in part to increasing competition for declining public funds. Publicly funded institutions, globally still the largest provider of tertiary education, face rising costs connected with increasing enrollment, rising research and employment costs, as well as a need for a large capital base (Douglass and Keeling, 2008). The tuition fees charged by many higher education institutions, particularly public ones, have come to represent a key part of its cost-sharing strategy which has come under increasing pressure as government's share has decreased.

The state's provision of higher education, and thus the existence and extent of tuition fees, has been linked to the underpinnings of national welfare policy (Busemeyer, 2006; Kwiek, 2008). As tuition fees indicate the portion of the per student instructional cost that is the responsibility of the student and/or his/her family to pay, the appropriate level is not only a financial question but also an ideological and political one. In some countries, many in Central and Eastern Europe, free education is guaranteed by the constitution and/or framework laws. In the United States, Canada, Japan, India, South Korea, the Philippines and some of the Anglophone nations in Africa, national and/or state policies require moderate tuition fees in most or all public higher educational institutions (Johnstone, 1992).

Types of Tuition Fees

As stated above, the existence and extent of tuition fees is largely dependent on the parental responsibility assumed for higher education which is embedded in the surrounding national framework. The way in which tuition fees are administered further reflects those beliefs. Broadly there are three types of tuition fee regimes: tuition free, tuition fees for all (upfront or deferred), and dual track tuition fees

In countries with no tuition fees, taxpayers via the government are responsible for the cost of higher education, and not the student's family. Examples of countries with no tuition fees include Argentina, Brazil, France, Iran, Germany (some *Länder*) and Nigeria (federal universities). In systems with tuition fees, the burden on the student's family depends upon whether or not the fees are upfront or deferred.

In upfront tuition fee regimes, parents are believed to have a responsibility in the cost of their children's higher education costs, though the expected contribution may differ according to income. Examples include Colombia and the Philippines, China, Canada, India, Japan, Taiwan, and the United States. Deferred tuition fee regimes, like tuition free regimes, also consider higher education not to be the responsibility of the student's family. In countries such as Australia and England, tuition payment is postponed until the student is financially able to assume payment.

Dual track fee schemes refer to systems where a portion of students pays a different amount than the other students in the system. While some dual track tuition fee schemes exist for domestic students – the government reserves a certain number of “free” seats for academically qualified students – many dual track systems apply to out of state or international students. In the Netherlands, Denmark and now Sweden, students from non-EEA countries are now required to pay tuition fees that domestic students are (Johnstone and Marcucci, 2007).

Determination of tuition fee levels can vary. In Hong Kong, for example, the tuition fee level is set by the central government. In other nations, like Australia and Japan, institutions have the authority to set their own tuition fee levels, but only within certain parameters set by the government. Still in other nations such as the United States, Canada and India, tuition fees for public institutions are set at the state or provincial level.

These practices have changed and evolved frequently in recent years as nations have experimented with different levels of institutional autonomy through combinations of governance and financial management (Marcucci & Usher, 2011).

Higher Education in Sweden

Throughout its history, Sweden has been part of the tuition-free regime, providing free higher education to all students regardless of nationality. However, the introduction of tuition fees in Sweden, and the development of a dual track fee regime is not surprising given the major internal and external changes in the recent years. This section seeks to provide an overview of the Swedish higher education system, including a view on its development, to better inform the later discussion of the impact of tuition fees on various aspects of the system.

Historical Overview

Higher education in Sweden has seen tremendous changes in the last 35 years. Moving from a highly centralized and uniform sector to one with a strong overall mission, but growing differentiation based on increased provisions for institutional autonomy. In 1977, Sweden undertook a massive educational reform, The Higher Education Act of 1977, which was a top down reform in which separate sectors of education were combined into a single unified system, the *högskola*. Unifying the higher education system was seen as a way to provide students from a variety of social backgrounds easier access to higher education while bringing higher education closer to the labor market. It also introduced a *numerus clausus*¹ system and more government involvement in curriculum setting.

Fifteen years later, a non-social democratic coalition government put forward a “Memorandum on the Independence of Universities and University Colleges” which was a first step to the Higher Education Act of 1993. In contrast to the 1977 Higher Education Act, the 1993 reform sought to give institutions more control of their own programs, resources, management and organizational design.

The 1993 Act also included a shift in the institutional funding scheme. By decentralizing the university admissions process and allowing individual institutions to determine their own admissions criteria, the *numerus clausus* system was ended. Financing was then determined on a per-student basis instead of on national demand forecasts (Ansell, 2008). The resulting model took into account both enrollment data (based on full time equivalents, FTEs) and study achievements (based on the number of students finishing their studies). Funds dispersed by the government were thus distributed within the institution by the institution itself (Deen, 2007).

¹ *Numerus clausus* is a method by which the number of students who may attend a university or study program is limited. The system is often used in countries and universities where the number of applicants greatly exceeds the number of available places for students.

Status Quo

Institutions and English Language Programs

Currently there are fifty-two institutions with higher education offerings in Sweden – ranging from large research flagships to medium-sized university colleges, small technical colleges and highly specialized arts schools (HSV, 2011a). The following table contains all public and private institutions with the right to confer graduate degrees along with their student population and research funds received from the Swedish government.

Swedish Public and Private Higher Education Institutions Conferring Graduate Degrees, 2009

| Swedish Institutions | First Established | Student Population | Research Funding |
|-------------------------------|-------------------|--------------------|------------------|
| Blekinge Institute of Tech. | 1989 | 3,815 | SEK 2,523 |
| Chalmers U. of Technology* | 1829 | 8,895 | SEK 1,760 |
| Jönköping U. Foundation* | 1977 | 8201 | SEK 208 |
| Karlstad University | 1977 | 7,729 | SEK 303 |
| Karolinska Institute | 1810 | 5,501 | SEK 4,027 |
| Linköping University | 1969 | 17,188 | SEK1,516 |
| Linnaeus University | 1977 | 13,614 | -- |
| Luleå U. of Technology | 1971 | 6,372 | SEK 711 |
| Lund University | 1666 | 26,645 | SEK 3,975 |
| Mälardalen University College | 1977 | 7327 | SEK 202 |
| Malmö University College | 1998 | 11493 | SEK 188 |
| Mid Sweden University | 1993 | 7,606 | SEK 333 |
| Örebro University | 1977 | 8,613 | SEK 342 |
| Royal Institute of Technology | 1827 | 11,959 | SEK 2,033 |
| Stockholm School of Econ. | 1909 | 1315 | SEK 160 |
| Stockholm University | 1878 | 28,185 | SEK 2,203 |
| Swedish U. of Agri. Sciences | 1775 | 3,596 | SEK 1,812 |
| Umeå University | 1965 | 15,860 | SEK 1,977 |
| University of Gothenburg | 1891 | 24,886 | SEK 2,999 |
| Uppsala University | 1477 | 20,429 | SEK 3,265 |

Notes: (*) denotes private; student population in FTE, 2009; research funding from the Swedish government in billions of SEK; funding for Linnaeus University not available due to its recent founding as a merger between Växjö and Kalmar Universities.
Source: HSV.

Among Sweden's twenty institutions conferring degrees on the postgraduate level, eleven have been listed in several global international higher education rankings during the last five years. The table below lists both THE-QS and ARWU rankings of these institutions since 2005.

Swedish Universities Ranked by THE and ARWU, 2005-2010

| Institution | 2005 | | 2006 | | 2007 | | 2008 | | 2009 | | 2010 | |
|-------------------------------|--------|---------|--------|---------|--------|---------|--------|---------|--------|---------|------|---------|
| | THE QS | ARWU | THE QS | ARWU | THE QS | ARWU | THE QS | ARWU | THE QS | ARWU | THE | ARWU |
| Chalmers U. of Technology | 166 | 203-300 | 147 | 201-300 | 197 | 203-304 | 162 | 201-302 | 198 | 303-401 | 204 | 201-300 |
| Karolinska University | N/A | 45 | N/A | 48 | N/A | 53 | N/A | 51 | N/A | 50 | 43 | 42 |
| KTH | 196 | 203-300 | 172 | 201-300 | 192 | 203-304 | 173 | 201-302 | 174 | 201-302 | 193 | 201-300 |
| Linköping University | N/A | 301-400 | N/A | 301-400 | N/A | 403-510 | N/A | 402-503 | N/A | 402-501 | N/A | 401-500 |
| Lund University | 180 | 99 | 122 | 90 | 106 | 97 | 88 | 97 | 67 | 101-151 | 89 | 101-150 |
| Stockholm School of Economics | N/A | 301-400 | N/A | 301-400 | N/A | 305-402 | N/A | 402-503 | N/A | 402-501 | N/A | 301-400 |
| Stockholm University | N/A | 93 | N/A | 84 | N/A | 86 | N/A | 86 | N/A | 88 | 129 | 79 |
| Swedish U. of Agri. Sciences | N/A | 203-300 | N/A | 201-300 | N/A | 203-304 | N/A | 201-302 | N/A | 303-401 | 199 | 201-300 |
| Umeå University | N/A | 203-300 | N/A | 201-300 | N/A | 203-304 | N/A | 201-302 | N/A | 201-302 | N/A | 201-300 |
| University of Gothenburg | 190 | 153-202 | N/A | 201-300 | N/A | 203-304 | 258 | 201-302 | 185 | 201-302 | N/A | 201-300 |
| Uppsala University | 180 | 60 | 111 | 65 | 71 | 66 | 63 | 71 | 75 | 76 | 147 | 66 |

Notes: In 2010, THE and QS became two separate ranking systems.
Source: AWRU, 2010. THE, 2010.

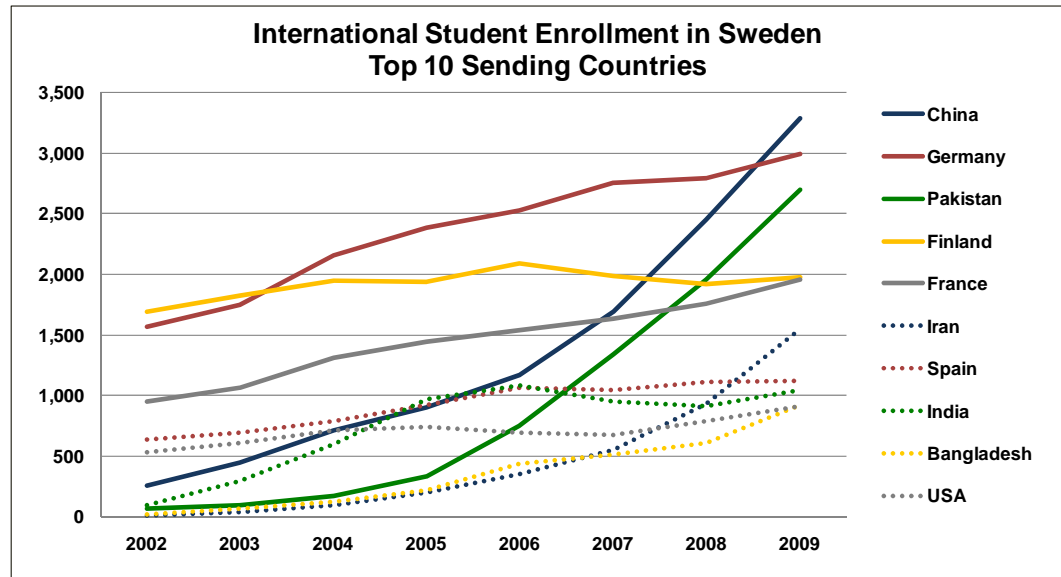
According to the Study in Sweden website maintained by the Swedish Institute, there are 41 English language degree programs at the Bachelor level and 696 English language degree programs at the master's level. (The Swedish Institute, 2011a).

International Students

During the 2009-2010 academic year there were 41,920 international students studying in Sweden – 27,542 were full degree seeking students, while 14,378 were on exchange. The following graphs show total and year-over-year growth of international students in Sweden between 2001 and 2010.

The total enrollment of international students has nearly tripled over seven years, growing from 13,915 in 2002 to 36,573 in 2009. In the above graph for 2009, the top ten sending countries comprised 50.5 percent of the total number of international students.

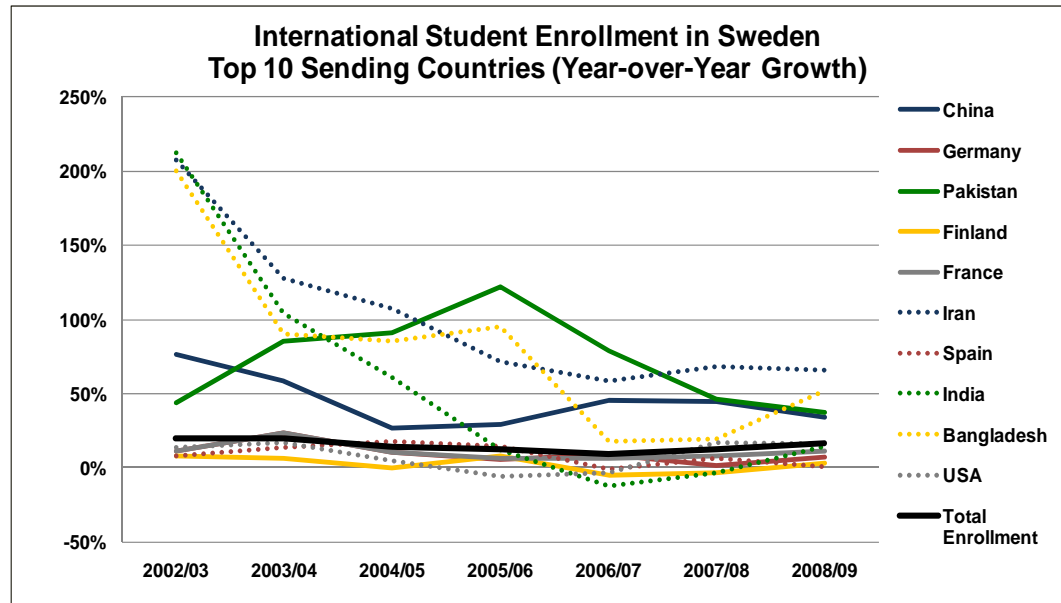
Total Enrollment of International Students in Sweden, 2002-2009



Source: HSV, 2010.

In 2009, China was the largest source country for Swedish universities, with 2,708 full-degree students and 495 exchange students. Pakistan, the second largest non-EEA source country, had 2,325 full-degree students and 19 exchange students.

International Student Growth (YoY) in Sweden, 2002-2009



Source: HSV, 2010.

Seen on the preceding page, Sweden's year-over-year growth of international student enrollment has remained fairly consistent, growing an average of 15 percent annually since 2002. Since 2002, full degree seeking students have grown on average 20 percent while the number of exchanges has grown by 9 percent during the same period.

Discussion

This section has sought to outline some of the factors which affect the existence and extent of tuition fees around the globe. Cultural, political and financial factors inherent in national frameworks shape tuition fee regimes into three major types: tuition free, tuition fees for all (up front or deferred) and dual track.

This section has also sought to highlight the development and current outlook of Sweden's higher education system with a view on international student enrollments. Sweden's shift from a tuition free regime to a dual track regime is occurring in a system which is undergoing changes (i.e. massive, unsustainable increases in international students from countries like China and Pakistan in recent years) while incurring new pressures (i.e. rising costs associated with increased applicants, the desire to recruit more talented students, etc.).

The following section seeks to provide a broad overview of the legislative introduction of tuition fees including proceeding legislation.

POLICY CHANGE: THE INTRODUCTION OF TUITION FEES

Introduction

The introduction of tuition fees followed a series of reforms which were aimed at expanding both internationalization as well as institutional autonomy. The following section outlines reforms which preceded the tuition fee bill as well as discusses some of the drivers which led to the introduction of tuition fees. The tuition fee bill – “Competing on the Basis of Quality – Tuition Fees for Foreign Students” – is then outlined.

Drivers toward Change

Following the framework of the Bologna Process, the Swedish government under Göran Persson proposed “New World – New University” (*Ny värld - ny högskola*, Government Bill 2004/05:162) which was subsequently adopted by the Riksdag in 2006. Spurred by the Bologna Process, the focus of the bill was to reform degree, program and course structures in an effort to better align with international standards including the adoption of the ECTS, the European Credit Transfer System (European Higher Education Area, 2006), (Ministry of Education, Research and Culture, 2005).

In 2009 the government proposed “Knowledge without Borders – Higher Education in the Era of Globalization” (*Gränslös kunskap - högskolan i globaliseringens tid*, Government Bill 2008/09:175). This bill expanded on the internationalization aspirations set forward in the “New World – New University” legislation by including proposals for increased funding for student and teacher mobility, joint degree programs, better coordination of foreign qualification recognition and strategies for increased international promotion for the higher education sector through the Swedish Institute. In the official press release for the bill, the ministry included its future plans for the introduction of tuition and application fees as part of a broader international agenda (Swedish Parliament, 2009).

“In the long term the internationalization of Swedish higher education ought to benefit from the introduction of fees for studies at universities and other higher education institutions in Sweden for students who come from countries outside the EEA and Switzerland. This Bill does not go into this matter, but the Government intends to return to the Riksdag with a proposal for study and application fees for students from countries outside the EEA and Switzerland.” (Swedish Ministry of Education and Research, 2009).

While largely focused on increased Swedish student and teacher mobility, the broader internationalization goals set forward by “Knowledge without Borders” paved the way for the government’s concrete proposal for the introduction of tuition fees.

In March 2010, the government proposed “Academia for this Day and Age – Greater Freedom for Universities and Other Higher Education Institutions” (*En akademi i tiden - ökad frihet för universitet och högskolor*, Government Bill 2009/10:149, also known as the “Autonomy Bill”) which aimed to simplify existing regulation included in the Higher Education Act and Higher Education Ordinance in order to allow institutions greater self-determination.

Based on a 2008 government inquiry entitled “Independent Higher Education Institutions” (*Självständiga lärosäten*, SOU 2008:104) which examined deregulation policies in Finland and Denmark, the bill proposed to decrease regulation of higher education institution’s internal organization, hiring practices of teaching staff and level of detail specification in curriculum and grading. The bill which was passed on the same day as “Competing on the Basis of Quality – Tuition Fees for Foreign Students” and came into force 1 January 2011 (Lund University, 2010a).

Tuition Fee Legislation

In February 2010, the Swedish government proposed, “Competing on the Basis of Quality – Tuition Fees for Foreign Students” (*Konkurrera med kvalitet - studieavgifter för utländska studenter*, Government Bill 2009/10:65) which for the first time requires all Swedish higher education institutions to charge “third country” students (non-EEA students) tuition fees. The bill stipulates, however, that education should remain free for all Swedish students and consequently all those coming from countries from within the European Union and the European Economic Area as well as Switzerland. In June 2010, the Riksdag voted in favor of the proposed bill for implementation by higher education institutions in the autumn of 2011.

In the introduction and explanation for “Competing on the Basis of Quality” the government built on aforementioned reforms, particularly “New World – New University” and “Knowledge without Borders” which have focused on developing Sweden as a competitive knowledge economy, much in line with the goals laid out in the Lisbon Strategy in 2000. As seen earlier in a government press release on “Knowledge without Borders”, the introduction of tuition fees for non-EEA students was believed to be a beneficial step for the internationalization of Swedish higher education.

Key to this point the bill argued that as one of the few remaining nations where foreign students had not paid tuition fees, Swedish institutions had not had an equal footing in the global higher education market. By establishing tuition fees for “third country” students, institutions would be believed to be better identified by the quality of the education and study environment, instead of as a no-cost option (Swedish Ministry of Education and Research, 2010).

Accompanying the introduction of tuition fees, the government established two grant pools for third country scholarships. Tobias Krantz, Minister for Higher Education and Research, was quoted in the government press release as saying,

"Foreign students are an asset to Swedish higher education. By no longer offering everyone - including those who are able to pay - free education, we will now be able to give special attention to students from countries with which we have development cooperation and to particularly gifted students. This is a much more efficient way of using Swedish taxpayers' money."

One grant pool will focus on students from low-income countries and the other will focus on highly qualified students from all countries.

Discussion

This section has sought to provide an overview of the various legislative actions leading up to the introduction of the tuition fee bill. Much of the legislation has focused primarily on expanding internationalization on all levels including the mobility of domestic students, teachers and researchers through increased funding, closer partnerships with international institutions as well as better alignment of degree and qualification programs.

The focus on increased institutional autonomy “Academia for this Day and Age” which has provided a further increase of institutional autonomy and authority for decision making was passed simultaneously with the tuition fee bill. This bill in many ways compliments the tuition fee bill as the aim is to allow institutions to compete more freely for talent and position.

However, the timing of the two bills against the timeline for the implementation of tuition fees resulted in a lack of coordination and clarity at the institutional level as to how to go forward with the implementation of tuition fees. The following section outlines many of the changes and challenge encountered in this new paradigm as well as reactions which have occurred on the institutional level.

POLICY AFFECTS: ANTICIPATED AND UNANTICIPATED IMPLICATIONS OF TUITION FEES

Introduction

The introduction of tuition fees has triggered a number of changes across Swedish higher education some of which were and some of which were not anticipated from the outset. The following section first outlines a number of actors in the Swedish Higher Education landscape who are impacted in various ways by the introduction of tuition fees, their role in the higher education system as well as challenges posed to them by the introduction of tuition fees. Secondly, national and cross-cutting issues affecting the handling of international students and tuition fees are presented. The section then finishes with a look at institutional reactions through a case study on Lund University.

Actors in a Changed Landscape

Swedish Higher Education Institutions

With the introduction of tuition fees for non-EEA students, institutions have greater impetus for bolstering their own internationalization strategies, which could introduce more elements of competition in the Swedish landscape. Given the monetary and human resource commitment needed to recruit international students, institutions must choose whether or not engaging in recruitment activities fits the institutional needs and resources available.

Ministry of Education and Research (*Utbildningsdepartementet*)

As the ministry responsible for Sweden's education system, the Ministry for Education and Research has a unique relationship to the higher education institutions, particularly within the framework of increased institutional autonomy. On the one hand, the government awards funding based on compliance with certain outcomes and measures. On the other hand, the government has called for greater autonomy and international competitiveness which requires that institutions take a greater part in their own governance and management. Thus new management and oversight issues may emerge.

As a national system of diverse institutions the Ministry faces the challenge of trying to balance the divergent needs within the higher education landscape.

The introduction of tuition fees and the simultaneous increase of institutional autonomy have presented challenges for individual institutions which in the past had relied on the direction and authority of the Ministry. As a result, the Ministry must navigate a new, more advisory role while monitoring the effects of the legislation.

HSV (*Högskoleverket*), Swedish National Agency for Higher Education

As the public authority responsible for overseeing higher education institutions, HSV largely acts through quality review and advisement. HSV was established in 1995 and is guided by the Education Act and the Education Ordinance as well as several other international obligations such as the Bologna and Nordic declarations.

As the new Education Act and Education Ordinance come underway in 2011 under “Academia for this Day and Age,” the HSV will be responsible for overseeing how institutions adopt new policies and how they are communicated publicly (HSV, 2010a).

VHS (*Verket för Högskoleservice*), The Swedish Agency for Higher Education Services

As a fee-financed government authority, the VHS provides institutions with a number of administrative services including the national processing of higher education admissions as well as the evaluation of foreign credentials for both foreign students coming into Sweden as well as Swedish students who have studied abroad. The universities and university colleges are joint owners and operators of the system and much of the admissions work, particularly AkVO (the organization responsible for checking foreign credentials), is dispersed at various institutions.

As the organization responsible for handling the admissions process for Swedish universities, the government’s decision to enact tuition fees for international students presents new challenges in adapting the standing national Swedish admissions system to compete with world-class admissions systems in the global arena. Given the inflexibility and cumbersome nature of any national admissions process, a tension exists in the higher education institutions in deciding whether to remain in a national admissions system for international student admissions or form local admissions systems which can better compete globally.

SUHF (*Sveriges universitets- och högskoleförbund*), The Association of Swedish Higher Education

A voluntary organization based on cooperation between universities and university colleges in Sweden. Founded in 1995, SUHF has no legal status but often acts as a representative for the higher education sector in an effort to better safeguard the “external interests” of the institutions (SUHF, 2010).

As the Swedish higher education sector has largely maintained a low-competition environment, SUHF has worked under the mandate of serving the interests of its members. As the policy environment surrounding the institutions changes, organizational differences undergirded by growing autonomy and competition may serve to complicate SUHF’s mandate as well as lessen the legitimacy of the organization.

The Swedish Institute (*Svenska Institutet*)

Founded in 1945 as an association, the Swedish Institute (SI) developed into a government agency focused on promoting international cooperation and exchange. While the Institute is involved in a number of outreach capacities, one of its main directives is to facilitate exchange and scholarship programs for foreign students and researchers.

Currently, the Institute grants around 500 scholarships annually, for first, second and third cycle studies as well as bilateral exchanges and research at Swedish universities. Scholarships available from the Institute are largely tied to nationality or are in conjunction with Swedish development efforts such as those through the Swedish International Development Cooperation Agency (SIDA) (Swedish Institute, 2011). With the introduction of tuition fees for non-EEA students, the role of the Institute in both recruitment and as a source of scholarship funds will continue to grow in importance (The Swedish Institute, 2011b).

Study Destination Sweden

Started in 2008, Study Destination Sweden (SDS) has been a project administered by the Swedish Institute aimed at creating a platform for the coordination of international marketing in Sweden. The impetus for the creation of SDS was in preparation for the introduction of tuition fees for non-EEA students and the perception of many within Swedish institutions that more could be done to enhance Sweden’s marketing as a study destination.

SDS is headed by a steering committee which represents 31 universities as well as the Swedish Institute. SDS has three working groups focused around different topics: the organization and evaluation of promotion activities, student services and public affairs and marketing and communications (SDS, 2011). Following the close of the project at the end of 2011, recommendations will be made concerning the nature of further collaboration between the universities and the Swedish Institute regarding national-level marketing.

National and Cross-cutting Institutional Issues

Introduction

The implementation of tuition fees has triggered a number of issues which the Swedish higher education system had never encountered in the tuition-free environment. The following section outlines issues regarding the planning and processing of international student applications including issues related to the legal and administrative framework.

Tuition Fee Setting

As “Competing on the Basis of Quality” went into effect 1 July 2010, universities and university colleges had only a limited amount of time to set and advertise tuition fees before the 2011 application period opened on 1 December 2010. While tuition fees had a broad minimum set by the government, the exact amount was left up to the discretion of each institution.

According to the bill itself, tuition fees were to be set by each individual institution based on what the government called “the principle of full cost coverage” (Swedish Ministry of Education and Research, 2010). Meaning, the level of tuition fees should be set so that both direct and indirect costs are recovered with the fees themselves. While the government set the full-cost recovery framework, many institutions encountered through the tuition-fee setting process, a number of other factors which are incorporated into tuition fee levels globally. These factors largely cover two categories: Price components and external drivers.

Price Components

As Swedish institutions (both public and private) have largely relied on government support for their financing and activities, the consideration of all elements which are included in tuition fees were not apparent. Furthermore, each program and course had to be priced individually as the full cost recovery differed substantially between subject matter (i.e. humanities versus the natural sciences, etc.). Although tuition fees are only for non-EEA students, largely comprising of English language masters programs, all courses and programs are required to set a fee level in the event that a non-EEA student would be eligible.

While pricing initially considered only government contributions, institutions realized the additional costs associated with competing for fee-paying students such as increased marketing, scholarships, preferential housing and additional support services. Other

considerations also included covering the administrative costs associated with the implementation of tuition fees at both the faculty and central level.

External Drivers

As a formerly tuition-free study destination, Swedish institutions had little reason to consider the broader external perceptions and choices prospective applicants face when considering study in Sweden. As entrants into a global market, Swedish institutions are now judged based on elements such as brand position, connectivity with the job market, research opportunities, internship and job placement as well as student life and extra-curricular activities.

Other external drivers which were not previous concerns include the high cost of living in Sweden (SEK 8,000 to 10,000) compared to other equivalent study destinations. While Sweden is known as a safe country which is appealing for many families, the cold climate and remote destinations of some institutions might well be new concerns.

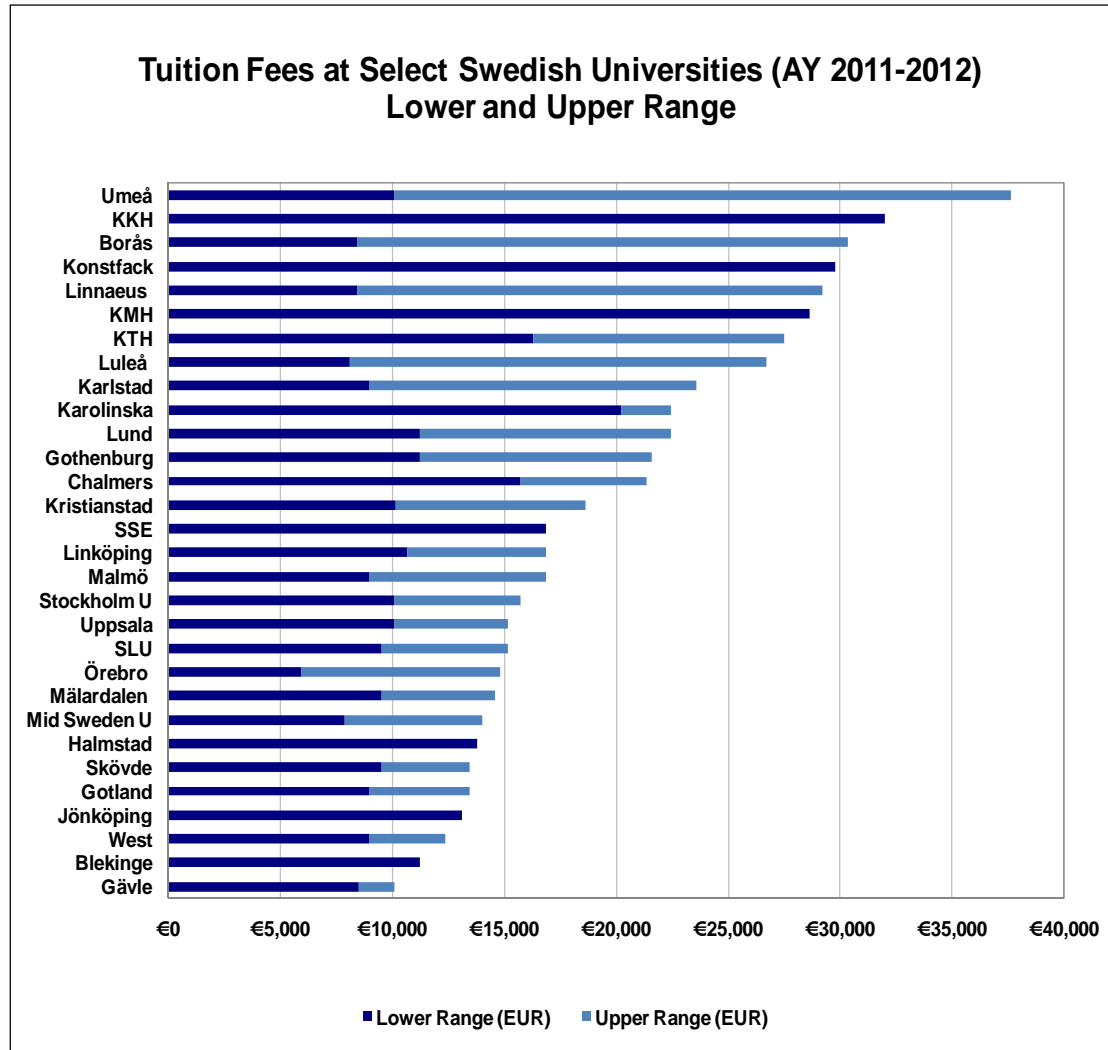
Institutions began posting their tuition fee levels throughout the summer and into the fall 2010. In the graph below, a sampling of fees from 30 institutions² displays a range of fee levels from SEK 75,000 to 335,000 (EUR 8,423 to EUR 37,621; 1 SEK = .1123 EUR³) depending on the institution and program.

While a bulk of the fees in the following sample ranges from EUR 13,000 to EUR 15,000, the vastly different prices within many institutions represent a divergence between specialized and mainstream program pricing. Specialized programs are those which include the arts, architecture and to some extent, medicine – while mainstream programs are those which largely constitute the majority of programs in the natural and social sciences.

² The information presented was retrieved from institutional websites, by calling institutions, and by exchanging information with the Swedish Institute.

³ Conversion rate obtained 11 February 2011 from www.oanda.com.

Tuition Fee Overview - Lower and Upper Ranges, 2011- 2012



Notes: Lund University lists tuition fees by individual program.

Sources: Blekinge Institute of Technology, Chalmers University of Technology, Jönköping University, Karolinska Institute, KMH, KTH, Linköping University, Linnaeus University, Lund University, Mälardalen University, Mid Sweden University, Stockholm University, Umeå University, University of Gothenburg, Uppsala University.⁴

Planning

While tuition fee levels were being set, institutions also had a number of other factors to consider. These considerations were not only triggered by the introduction of tuition fees, but also affect the recruitment of fee-paying

⁴ The information presented was retrieved from institutional websites, by calling institutions, and by exchanging information with the Swedish Institute. The tuition fee overview graph above reflects data from February 2011.

students. The following section examines three of these considerations: course and program offerings, scholarships, and marketing and recruitment.

Course and Program Offerings

The number of English-language master's programs at Swedish institutions varies significantly – from none to more than 80. The number of non-EEA students within the programs can also differ widely. Some programs/courses have relatively low enrollment levels overall and are populated predominantly by non-EEA students. Conversely, some institutions have large English-language master's programs with substantial numbers of non-EEA students as well as EEA and Swedish students.

Both situations pose viability questions concerning the future and nature of English language programs that are highly dependent or have large numbers of non-EEA students. In some situations, institutions are faced with the possibility of running English language master's programs for only a fraction of the desired number of students if a substantial number of non-EEA students do not apply. In other situations, programs which were originally designed to have a multi-national cohort may become increasingly less diverse with a loss of non-EEA students.

In addition to losing non-EEA students from certain programs, many institutions are faced with the consideration of attracting non-EEA students through the introduction of new programs or the augmentation of existing ones. Given upward global trends in professional and one-year degrees, possibilities include offering more one-year programs or other professional programs which may not have existed.

Scholarship Offerings

Given the competitive nature of recruiting top talent, having available scholarship funds and study packages is a key competitive tool in the global higher education environment. As a formerly tuition-free destination, distributing scholarship funds and aligning them with recruitment efforts is a new challenge for the government and institutions, particularly on the faculty and departmental levels.

The scholarship pools laid out by the Swedish government in the tuition fee bill include one fund set at SEK 30 million (EUR 3.5 million) per year focused on 12 developing countries. The second fund set at SEK 30 million in 2011 and SEK 60 million, is allocated for highly qualified students from other non-EEA countries. While these amounts

were stipulated in the bill, the allocation to the universities was unclear. It was eventually decided that allocation for the first years would be based on prior governmental contribution. Afterwards, scholarship allocation would be based on the number of fee paying students recruited.

A disconnect between tuition fee setting done by the university and scholarship funds allocated by the government became apparent once tuition fees were set. The government had not taken into account that tuition fees could be higher than the previous government contribution. As a result, funding levels would not cover as much of the cost, limiting the reach of the scholarship funds. As such, institutions were not aware until later in the fall of 2010 how much money would be made available to them.

Marketing and Recruitment

Student recruitment, particularly for highly selective institutions, can be very expensive. In a 2007 *State of College Admissions Report*, in the United States the mean cost to enroll a domestic US student was USD 2,350 with a range from USD 658 to USD 2,862 (Darrup-Boychuck, 2007). The cost of recruiting international students can easily range into the thousands of Euros per student as institutions, have to make substantial initial and continuous investment in related efforts such as:

- Enhancing marketing materials and channels both online and in print.
- Hiring or reorganizing international office staff.
- Attending recruitment fairs.
- Working with recruiting agents (if deemed necessary).
- Providing additional assistance for international students for immigration and transitional issues.

While institutions may use tuition fee funds to support increased marketing and recruitment efforts, these funds will only be received over time. Many institutions have been faced with the prospect that adequately addressing these issues requires substantial financial and human resources as well as strategic initiative.

Admissions Processing and On-Boarding

Also triggered by the introduction of tuition fees is the increased importance of application and admissions processes with regards to fee paying students. The following section outlines issues encountered with the current admissions framework including visa and immigration processes.

Time Lining

In 2001 Sweden began the development of a national admissions processing system in order to share the resources and costs of admissions processing amongst all higher education institutions. Deployed in 2006, the current system administered by VHS was designed with domestic student processing in mind which has presented issues for international student applicants. As the admissions process is a key component in talent acquisition, some institutions have identified this as a concern for recruiting fee-paying students.

One major issue facing institutions is the late application cycle and long processing times currently in place in the national system. Looking at global admissions patterns, application cycles usually open in early October and close in early to mid-January. In Sweden, however, the national system opens on 1 December and closes in mid January, with decisions made from late March to late April. As a result, institutions are structurally unable to capture highly talented students who are already committed as early as mid-October.

In the previous tuition-free paradigm, the timing of the admissions cycle and the length of the processing period had a limited effect on the number of non-EEA students an institution could recruit given the large number of willing applicants. The application window and length of processing has become increasingly important for Swedish institutions that now not only compete for non-EEA students in general, but also for those who are considered highly qualified.

Decision Making

Within the framework of the national admissions system, all applications are first processed centrally to make sure that they meet what are termed “basic qualifications” (e.g.; legitimate documentation). Those applications which have the “basic qualifications” are then sent to the respective institutions to be examined for “specific qualifications” (e.g.; required degree, sufficient prior coursework, etc.). Applications which meet all “specific qualifications” are then ranked and accepted in that order.

This current system requires a significant amount of time (processing time 60-90 days in past cycles) and is opposite to that of many university systems which first check for specific qualifications (e.g.; grades) through self reporting, and then verifying legitimacy once the applicant has been accepted. Processing time for many of these

systems occurs within 14-40 days and is widely employed in top research universities around the world.

By virtue of not operating their own admissions and having an extended processing time, Swedish universities are unable to customize their admissions process, offer quick decisions and scholarship packages, or answer questions directly which come through the system. While a national admissions system works for admitting Swedish students to programs, institutions which want to compete globally for talent are fundamentally restrained by not being able to orchestrate all steps of the admissions process.

Application fees

In the fall of 2008 the Swedish national admissions system received over 114,900 international applications from non-EEA students of which 18,000 were offered admissions. The massive number of applications prompted a number of discussions between the higher education institutions, the Ministry, HSV, SUHF and VHS about the most efficient use of resources and costs regarding international student fee processing.

The eventual solution was to propose an application fee of SEK 1,000 (EUR 111) for the fall of 2009 for the 2010-2011 intake cycle. However, VHS was not able to introduce the fees in the system in the allotted time so it was then postponed until the fall of 2010 for the 2011-2012 intake cycle – eventually coinciding with the introduction of tuition fees (Landes, 2009).

The final amount, SEK 900 (EUR 100) is set into law so that any changes or adjustments to the amount must be made in the law itself. The reason given for the high amount (most international master's application fees range between EUR 45 – EUR 60) is that students applying through the national system are able to apply for up to four individual programs. While applicant's do have this option, evidence from the fall 2010 application cycle for the 2011-2012 intake indicates that 37.8 percent of applicants applied for only one program.

Before the introduction of tuition fees, the presence of such a high application fee could be justified in light of free tuition. However, the overall high application, even with the possibility to apply for four programs, likely acts as a preventative barrier for potentially interested applicants.

Visa and Immigration

Before the introduction of tuition fees, ensuring that admitted applicants obtained a residency permit and were able to start school on time was not a major issue for the government or institutions as there was little at stake if applicants failed to do so. Since the introduction of tuition fees, the government and institutions have a vested interest in ensuring that non-EEA applicants who are accepted and pay their tuition fees are granted the necessary residency documents in sufficient time to begin their studies.

Since the introduction of tuition fees, prospective non-EEA students may not apply for a study permit until the institution has notified the Swedish Migration Board of receipt of payment from the applicant. Swedish institutions and the Swedish Migration Board have negotiated that non-EEA students have until the 15 June 2011 to pay the minimum tuition amount for the first semester in order to ensure on-time processing.

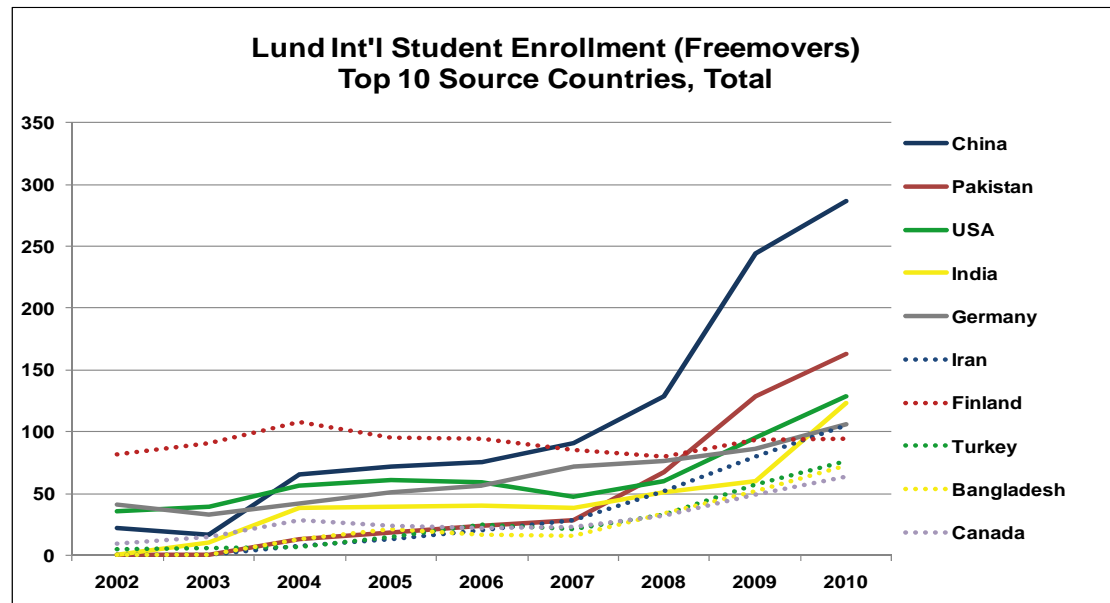
Case Study: Institutional Reactions to the Introduction of Tuition Fees at Lund University

Institutional Overview

Founded in 1666, Lund University is one of Scandinavia's oldest and largest research universities with eight faculties and a number of research centers and institutes. Lund offers 2,254 courses, of which 546 are conducted in English and 281 programs, of which 85 are conducted in English (Lund University, 2010b).

Lund had a total student population of 47,266 during the 2010-2011 academic year. International students numbered 4,268 of which 1,633 were non-EEA free-mover students. The following tables depict the number of international students from the top ten sending countries in absolute numbers between 2002 and 2010 (HSV, 2011b).

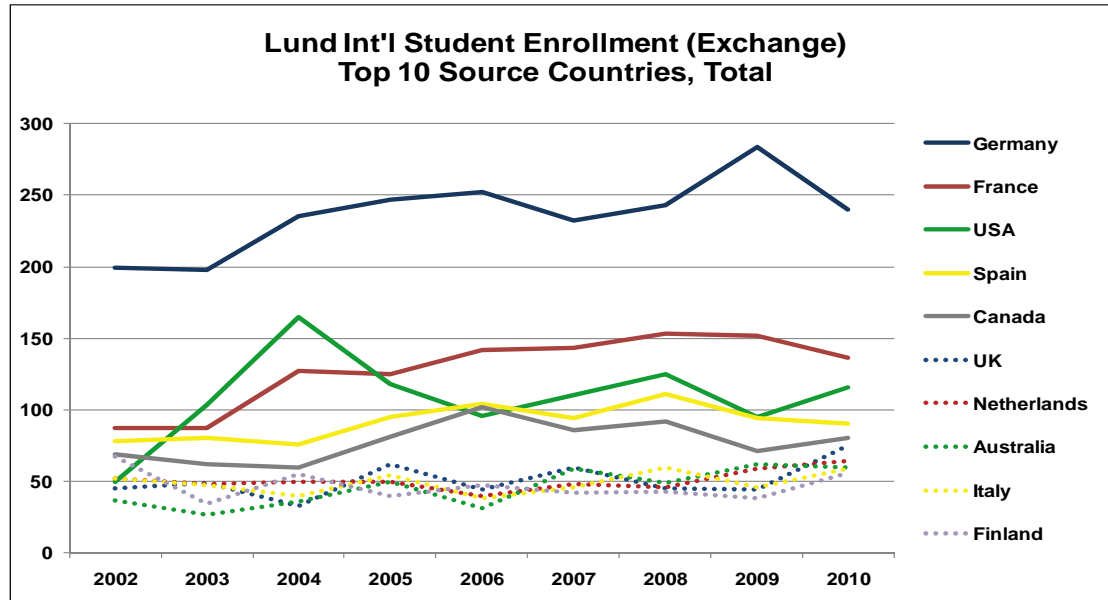
Total Enrollment of International Students at Lund, 2002-2010



Source: HSV.

During the 2010-2011, Lund had 1,767 incoming exchange students and 997 outgoing individual exchange students to 680 partner universities in 50 countries (Lund University, 2011b).

Exchange Students at Lund, 2002-2010



Source: HSV.

Lund has been consistently highly ranked in global university rankings. In 2010, Lund was ranked 89th in the Times Higher Education World University Rankings (THE), 72nd in the QS Rankings (QS), and in the 100-150 range in the Shanghai Ranking of World Universities (ARWU).

Lund University Ranked by THE-QS and ARWU, 2005-2010

| 2005 | | 2006 | | 2007 | | 2008 | | 2009 | | 2010 | |
|--------|------|--------|------|--------|------|--------|------|--------|---------|------|---------|
| THE QS | ARWU | THE QS | ARWU | THE QS | ARWU | THE QS | ARWU | THE QS | ARWU | THE* | ARWU |
| 180 | 99 | 122 | 90 | 106 | 97 | 88 | 97 | 67 | 101-151 | 89 | 101-150 |

Notes: In 2010, THE and QS became separate ranking systems.

Source: AWRU, 2010. THE, 2010.

Lund has also received more research funding than any other full-scale higher education institution in Sweden. It is a member of research-intensive university networks Universitas 21 (U21), and the League of European Research Universities (LERU). Lund also offers six master's programs that are funded through the Erasmus Mundus Scholarship program (Lund University, 2010d).

In common with most higher education institutions in Sweden, Lund is headed by a University Board. This decision-making body is comprised of the Vice-

Chancellor, representatives of the teaching staff, students, and representatives of the community as well as the business sector. The general activities and operations at Lund are overseen by the Vice-Chancellor, and the Pro Vice-Chancellor.

Lund has eight Faculties. At the Faculty level, activities are headed by Faculty Boards which are made up from a mixture of representatives similar to that of the University Board. Within Faculty Boards, smaller governing bodies operate with responsibility for specific areas such as education, research, etc. These are carried out in the departments (Lund University, 2010c).

Strategic Initiatives Regarding Tuition Fees

Before the tuition fee law “Competing on the Basis of Quality” was introduced by the Swedish Government in February 2010, leadership at Lund University had begun in early 2009 to monitor the government’s actions toward the introduction of tuition fees. This included extensive interviews of faculties, market analysis, and a SWOT analysis on the University’s preparedness for the potential impact of tuition fees for non-EEA students (Lund University, 2010d).

Despite their proactive stance, Lund like many institutions across Sweden saw the introduction of tuition fees as a drastic departure from the post-WWII policy status quo. Many perspectives at the time – some of which have continued until today – were characterized by hesitation and resistance, while others quickly realized the necessity of decisive action.

Once the fees became imminent, the initial institutional response was to further gather and process information on the potential impact of tuition fees and needed responses through multiple channels and approaches. These included engaging in peer learning and study trips, involving faculties and departments and seeking the advice and consultation of external experts (Lund staff, personal communication, March 29, 2011).

- Peer learning. Lund utilized its Universitas 21 network in order to conduct benchmarking of peer universities regarding internationalization and internationalization strategies. Lund engaged with the University of Nottingham and the University of Birmingham among others. Efforts were also made to speak with institutions in Denmark as well as Oxford University regarding their experiences with the introduction of tuition fees.
- Study trips. Lund administration visited other peer institutions including the University College Dublin and Leiden University to conduct

interviews with senior administration and faculty members on issues related to tuition fees and fee paying students.

- Faculty and departments. From mid 2009, the administration sought faculty representation on tuition fee related committees as well as held a number of open meetings and seminars on tuition fee related concerns.
- External experts. In January 2010, Lund representatives attended a full-day seminar in Brussels as well as invited external experts to campus to discuss strategic issues and hold open seminars.

Through the various intelligence and scoping projects undertaken both internally and externally, the central management decided to form groups in order to comprehensively address tuition fee introduction and related changes. Three groups were formed to handle issues at varying levels:

- A strategic tuition fee group. This group was composed of representatives from every faculty along with administration in order to address issues regarding impacts on student recruitment, etc.
- A small coordination group. This group was headed by the University Director and composed of heads of different sections to focus on issues regarding budget allocation.
- A large coordination group. This group was also headed by the University Director but contained a much broader selection of administrators and staff in order to address and account for all areas impacted by the introduction of tuition fees.

In addition to forming groups to address tuition fees, Lund also formed a five year goal for internationalization to help guide the University. For fall 2011, Lund set a target to keep two-thirds of the pre-tuition fees, non-EEA incoming level – around 400 students. Within five years Lund set targets to grow to 1,500 fee-paying students, 1,500 European students, and 1,800 exchange students (Åkesson, 2010).

To aid in the transition to tuition fees, the University Board of Lund allocated SEK 10 million from capital funds in February 2010. While tuition fees for non-EEA students are meant to be full cost, as to not create a profit but cover the expenses associated with non-EEA student attendance, the University Board allocated this money for initial costs such as increased marketing and recruiting efforts, and services to fee-paying students, etc.

For 2011, the University Board has allocated another SEK 6 million. These funds must be paid back over the next ten years as the university receives tuition fee income (Lund staff, personal communication, March 29, 2011).

Tuition Fee and Planning Actions

Tuition fee setting

Lund's initial proposed tuition fee model utilized the Swedish government's contribution per student, per program as the baseline for setting tuition fees. Additional costs were then added to this baseline for a proposed cost per program. These additional costs included orientation and services, scholarships (~7.5%) and the cost of marketing and agents (~15%). A revised costing model also utilized the Swedish government's contribution per student, per program and added static charges for services and reception (SEK 10,000), housing fees (SEK 7,500), scholarships (SEK 7,500) and a dynamic cost for marketing and agents (17.65%).

A global comparison of peer institutions' tuition levels was then undertaken to understand proposed tuition levels relative to institutional position (based on rankings, research level, size, etc.). With the exception of some continental European schools, Lund was underpriced between EUR 7,000-15,000⁵ depending upon program and institution. Further adjustments to the costing model included adding more dynamic components to the costing structure (Lund staff, personal communication, May 15, 2010).

In early May 2010, tuition fee models which had been discussed by the Strategic tuition fee group were discussed with the University Board. The Board then set the principles of the costing model which the Vice-Chancellor used to set the final prices in mid June. This model was subsequently copied by several universities throughout Sweden

English-language Program Assessment

Lund has had one of the largest English-language program and course offerings in Sweden. Given the potential shifts in recruitment pools and loss of international students, the viability of all existing program and courses is tenuous. Every faculty conducted an evaluation of programs, but many of the newest programs had only been introduced in the fall of 2007. Thus many faculties decided to keep their program offerings through 2011-2012 to see how tuition fees impact program numbers. At that time, faculties may either decide to phase out programs which have had too few students or add programs which reflect demand patterns and interest.

⁵ Comparisons based on Lund's initial proposed tuition fees for 2011-2012 against published tuition fee levels for 2010-2011 at the following peer institutions in the fields of environment, engineering, business and social science: Georgia Tech, University of Queensland, University of Leeds and Frankfurt University.

Marketing and Recruitment Efforts

International Web Redesign

One of the key marketing and recruiting efforts undertaken by Lund in preparation for the implementation of tuition fees was the redesign of the existing international website. While there was already a web project underway for the entire university, plans for an overhaul of the English language website were not scheduled for another two years.

It was determined by those already involved in the current web project, as well as its steering committee, that in light of the introduction of tuition fees, recruiting international students would require an enhanced marketing strategy, including the redesign and expansion of the existing international website.

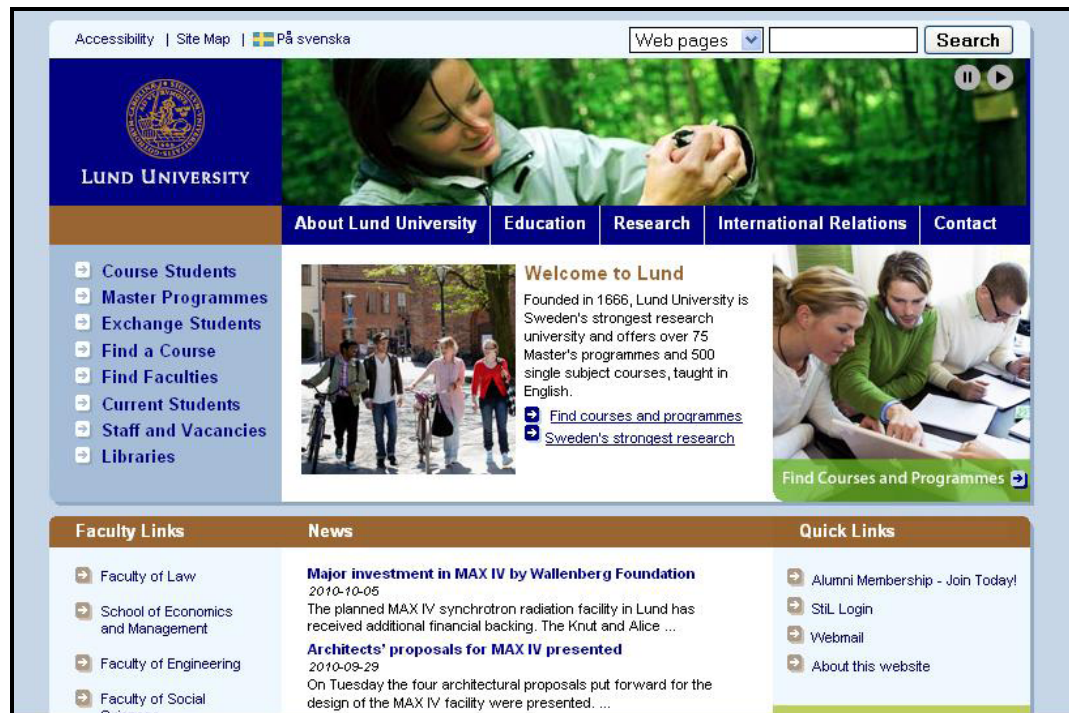
Two current, but rather new employees involved in the university-wide web redesign volunteered to undertake the project. In May 2010, a budget of SEK 2 million (€215,000) was approved and a procurement process was undertaken with selected vendors. By 9 June 2010, Lund employees heading up the website redesign met with the five vendors – some new and some with previous ties to the university – and began working.

Between 9 June and 6 October 2010, processes were undertaken in order to fundamentally change the look and functionality of the existing site. Before technical work began, interviews were undertaken with staff from the web, communications and IT departments as well as with international students regarding user profiles, preferences and pathways for target markets.

As work started, a number of front and back end programming issues had to be solved including connectivity with a number of sources like LUBAS (a major Swedish database housing official course and program documentation (e.g. all official naming conventions), LADOK (Lund's own education database housing all course and program descriptions) and LUCAT (Lund's faculty and staff directory). Finally, extensive content work was undertaken to ensure better readability, consistency, flow and English language usage.

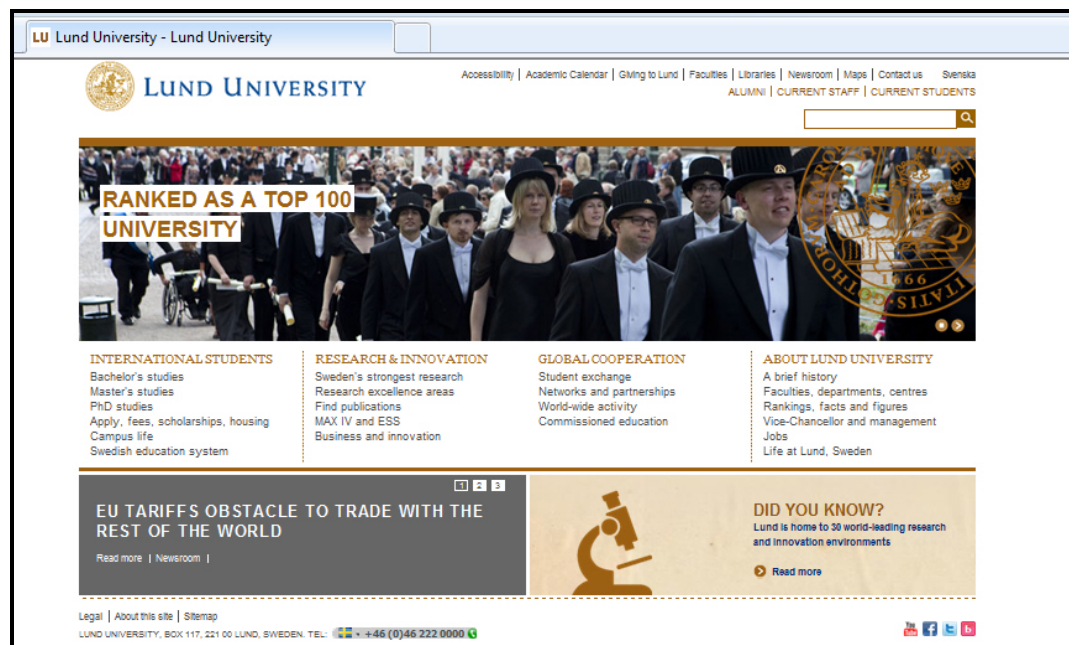
Below are screen shots of the international home both before and after the redesign. The new design features increased usability and navigability, through a reorganization of menus and pages. The homepage connects international student with key information including programs, applications, scholarships, tuition fees, and student life. The website also takes advantage of Web 2.0 tools including YouTube, Facebook and Twitter.

Previous International Home Page



Source: Lund University.

Revised International Home Page



Source: www.lunduniversity.lu.se.

Fairs

Before the introduction of tuition fees, Lund did not attend any international education fairs as a university. Given the introduction of tuition fees it was determined as a priority in 2010 and SEK 800,000 was allocated to support fair attendance. In total, Lund attended educational fairs in 26 cities across China, Turkey, USA, India and UAE.

A core Lund staff of five people attended fairs in all countries with various faculty representatives joining throughout. Business and Engineering faculties attended in China and India; Social Sciences, Natural Sciences and Student Services joined in Turkey; and the Faculty of Medicine in the US. Additionally Lund joined efforts coordinated by the Swedish Institute at five fairs in India.

Lund staff utilized their experiences at the various fairs to gauge international perspectives on Lund as well as look for areas of improvement. These learnings were later aggregated into “Gap and Opportunity” areas – country-specific student demand patterns, interest levels, and perceptions both positive and negative about Lund and Swedish Higher education. These realizations have been raised with the central administration and faculties to address in future recruitment cycles

Agents

In 2010, Lund set aside SEK 100,000 to investigate the use of agents for recruitment which included meeting agents and seeking external advice. Having no impetus for agents in the past, the use of agents has been pursued slowly and carefully, particularly as many faculties have been reluctant. In recruiting for the 2011-2012 academic year, Lund chose to work with four agents in China. For the 2012-2013 academic year, Lund will look to increase its work with agents in India and Vietnam.

Additional Marketing Efforts

Lund also expanded other marketing efforts through online and web 2.0 channels as well as more traditional marketing methods.

- New promotional materials. Lund created new English language print brochures which were distributed at educational fairs but were not mass mailed. Next year, efforts are focused on creating a comprehensive brochure which will cater to international students including both free movers and exchange students. Canvas tote bags were also printed with the university's logo as a give away to prospective students at fairs.

- On-line competitions. Lund launched an entrepreneurial competition called “Master Your Idea” whose winner received a full tuition waiver to the Master’s Program in Entrepreneurship. Lund also launched a video competition for current students entitled “My LU” which asks students to create YouTube videos which communicate their experience at Lund.
- Web 2.0 outlets. In August 2010, Lund created an international Facebook page. This page was then merged with an existing page created originally by a student. Within seven months the page had received 5,764 “Likes”. Lund had created a YouTube channel in May of 2009 but has engaged with the channel more in the last year by creating a customized background and frequently updating videos. In March 2010, the channel had 211 subscribers, 36,223 channel views and 28,082 upload views.
- Marketing surveys. In 2010 and at the close of the fall 2011 application cycle, Lund staff engaged current students and applicants through online surveys about perceptions and utilization of current marketing efforts.
- Foreign media engagement. In October 2010, Lund, Karolinska University and Gothenburg University, participated in an initiative with the Swedish Institute to host seven foreign journalists writing about higher education in Sweden.
- Promotional videos. Lund also worked with a Chinese-based company to create a promotional video to be aired in China and elsewhere. The video was created in a Chinese language version with English and Chinese subtitles as well as in an English language version.

Scholarships

One of the main concerns of the faculties and central administration was the amount of scholarship money available for attracting highly qualified individuals. Lund received SEK 2.25 million (EUR 250,000) scholarship funds from the Swedish government. Based on the average cost of tuition fees of SEK 125,000 at Lund, the government funding is equivalent to fully funding 18 non-EEA students. This calculation, around 7 percent of the national scholarship funding pool, was based on the proportional loss of funding from the government. However from 2013 onwards, scholarships will be based on the number of non-EEA students at an institution in the previous year.⁶

⁶ At the time of writing, Lund had 18 percent of all accepted students in Sweden meaning that its share of scholarship money will be expected to increase beginning in 2013.

The money received from the government, as well as Lund's own fundraising efforts – SEK 3.5 million⁷, has been used to create Lund University Global Scholarships. These scholarships are awarded to cover different amounts of tuition fees from 25%, 50%, and 75% up to 100%. Scholarships were divided amongst the faculties by faculties submitting proposals for what was believed to be needed. The administration then made adjustments so that every faculty received at least one scholarship and amounts were varied for faculties offering one-year programs.

New Offerings for International Students

Lund has initiated a series of new policies and programs directed at international students.

- Pilot career services programs. For the first time, Lund held career service workshops for international students. These workshops focused on conducting job searches and creating resumes for the Swedish context.
- Free Swedish language courses. Lund will now offer free Swedish language courses to all international Master's degree students.
- Enhanced arrival activities and assistance. Previously arrival activities were organized for exchange students but not full-degree international students. Lund has expanded these activities to include full-degree international students.
- International services desk. Hours and staffing have been increased to assist international student inquiries.
- International alumni network. For the first time, Lund held alumni events in New York, Beijing and Hong Kong and is in the process of hiring an Alumni Coordinator.

Admissions System Redesign

In November, Lund initiated two assessment projects concerning the processing of international student applications. One project was a requirements analysis for Lund to run local admissions for international students at Lund University. The other project was an assessment of the current and future capabilities of the national admissions system with a view on the external national portal ("study.now", *studerar.nu*) and the internal user interface ("New", *Nya*).

⁷ A portion of the funds (SEK 1 million) have been saved for next year's allocation.

Beginning with more than 40 interviews across campus, the requirements analysis examined current practices in application procedures, admissions processing, visa and immigration processing, intelligence and analytics as well as legal, organizational design and IT. The assessment finished with an examination of various admissions processing options including remaining within the national framework, running an interim dual admissions model with both the national and local solution in place for the first year, and the option of moving completely to a locally run system beginning in the first year.

No actions have been taken for implementing local admissions for 2011 academic year as only one faculty is currently willing to support the move to local admissions. The central administration has stated that it would be willing to move ahead if a second faculty would also participate. Given the embedded position of the national admissions system within Swedish Higher education, although it has not led to concrete action, the investigation into locally run admissions illustrated members of the Lund community's willingness to consider drastic change.

Discussion

This section has sought to present three angles on the range of issues and reactions triggered by the introduction of tuition fees. Looking at the various actors within the Swedish landscape, the introduction of the tuition fee bill, accompanied with the introduction of “Academia for this Day and Age” have produced new priorities and new challenges for many of the actors. The emerging paradigm based on these changes has left actors with changed and/or evolving roles.

Accompanying the paradigm shift for many of the actors in the landscape, the broad survey of cross-cutting institutional issues triggered since the introduction of fees seeks to further underscore the complexity of factors accompanying this policy change. In particular, this section demonstrates the breadth of issues – from tuition fee setting, to course and program planning, to organizational design and admissions – which must be incorporated into a strategic handling of tuition fee policies.

In contrast to the broad overview of issues experienced by many institutions, the narrow focus provided in the Lund University's case study provides a snapshot of the affects and subsequent institutional reaction. Lund University has been a particular front runner amongst Swedish universities in dealing with tuition fees and thus the case study presents a unique look into a proactive approach of the handling of the issue at the institutional level.

TUITION FEES: A NORDIC PERSPECTIVE

Policies in Denmark, Finland and Norway

Introduction

The Nordic countries' long, common history has contributed to modern day cultural, social and linguistic similarities including a number of higher education policies. Comparative higher education studies with Anglo Saxon and Nordic countries have demonstrated historical similarities in the Nordic countries which often run counter to the highly competitive, privatized systems of the Anglo-Saxon countries. A study by Kivinen and Rinne (1990) found that historically higher education in the Nordic region – Denmark, Finland, Iceland, Norway and Sweden - have been characterized by:

- Relatively small size and restricted markets.
- Strict centralization and control of resources.
- Formal institutional uniformity with no hierarchy ostensibly recognized.
- Restricted competition, exercised with respect not to markets, students, nor business but to state-controlled resources.
- Low institutional initiative, as conditions of strict centralization inhibited the taking of initiatives, the challenge of bureaucratic rule in the universities or the development of an entrepreneurial spirit.
- The right to study in higher education free of charge.
- Strong belief in fostering social equality by removing the obstacle preventing equality of educational opportunities in higher education.

While political and economic factors have had an effect on the development of these systems – economic difficulties in the 1990s and joining the European Union in particular – these systems have generally retained relatively strong state control as well as free access in the higher education sector (Kosonen, 2001; Fägerlind, I. & Strömqvist G., 2004). The introduction of tuition fees, however, is a major shift away from the above characterization.

Given the relative similarities in welfare policy history and higher education architecture in the Nordic region, examining the tuition fee experiences in Denmark, Finland and Norway provide an interesting lens with which to view the introduction of fees in Sweden. The following section will provide perspectives on Denmark, Finland, and Norway by providing a brief historical overview of higher education development, the current handling of funding and tuition fees, an overview of international students and English-language master's studies as well as a brief look at possible future developments in tuition fee policies.

Denmark

Overview

Before the 1960's, Danish higher education was segmented into universities, professional schools and several specialized schools. The disconnect between institutions and educational levels made understanding mobility through the system and into the labor market unclear for students and employers. As demand for higher education began to increase substantially in the 1960's, Danish policy makers of the 1970's sought to expand and restructure the system in order to allow for smoother transitioning between educational levels, institutions and the labor market.

Despite extensive attempts at planning and development, political disputes and an economic recession hampered many reform efforts. Reforms of the 1990s eventually laid the groundwork for the features which largely characterizes the system today. In 1993, two education acts reformed university study programs, research and institutional governance as well as introduced the Bachelor (three years), Candidatus (i.e., Master's; two years) and Ph.D. (three years) degree system (Rasmussen, 2004). Reforms through the 2000s have focused on increased quality assurance, accreditation and oversight mechanisms through various ministries (Danish Ministry of Science, Technology and Innovation, 2010).

Today Denmark's higher education system is composed of three types of institutions: Academies of professional education, University Colleges and Universities/University level institutions. Currently there are eight universities:

- Aalborg University (AAU)
- Aarhus University (AU)
- Copenhagen Business School (CBS)
- IT University of Copenhagen (ITU)
- Roskilde University (RUC)
- Technical University of Denmark (DTU)
- University of Copenhagen (KU)
- University of Southern Denmark (SDU)

There are also thirteen University-level institutions of fine and performing arts, design and architecture which also offer degrees on the Bachelor, Master and Ph.D. levels. The following table provides a summary of Times Higher Education (THE) and Shanghai (AWRU) global higher education rankings of Danish universities from 2005-2010.

Danish Universities Ranked by THE-QS and ARWU, 2005-2010

| Institution | 2005 | | 2006 | | 2007 | | 2008 | | 2009 | | 2010 | |
|--------------------------|--------|---------|--------|---------|--------|---------|--------|---------|--------|---------|------|---------|
| | THE QS | ARWU | THE QS | ARWU | THE QS | ARWU | THE QS | ARWU | THE QS | ARWU | THE* | ARWU |
| University of Copenhagen | 66 | 57 | 54 | 56 | 93 | 46 | 48 | 45 | 51 | 43 | 177 | 40 |
| University of Aarhus | 138 | 101-152 | 126 | 102-150 | 114 | 102-150 | 81 | 93 | 63 | 97 | 167 | 98 |
| Technical U. of Denmark | 154 | 153-202 | 194 | 151-200 | 130 | 151-200 | 133 | 152-200 | 159 | 152-200 | 122 | 151-200 |
| U. of Southern Denmark | N/A | 203-300 | N/A | 201-300 | N/A | 203-304 | N/A | 303-401 | N/A | 303-401 | N/A | 301-400 |

Notes: In 2010, THE and QS became two separate ranking systems.
Source: AWRU, 2010. THE, 2010.

According to the Study in Denmark international student website, there are 31 English language degree programs at the Bachelor level, and 111 English language degree programs at the master's level.

Funding and Tuition Fees

Since the 1980's, Danish universities have been funded via a central education budget system. Denmark utilizes a number of mechanisms for higher education funding including: a budget based on past costs, a funding formula which incorporates an institution's enrollment level, performance contracts based on strategic objectives and a competitive bidding process for research funding (Eurydice, 2008).

In 1990, the Danish government introduced the first tuition fees in Danish higher education by trying to partially offset the cost for vocational education programs (AC The Danish Confederation of Professional Associations, 2010). In 2006, Denmark introduced a second tuition fee program, tuition fees for non-EEA students. As a result, institutions no longer receive government funding for non-EEA students but instead have been encouraged to set fees at or above the level contributed by the government. Tuition fee levels vary considerably amongst universities (between EUR 6,000 and EUR 16,000 per year), but average around EUR 10,000 for most programs (Myklebust, 2010).

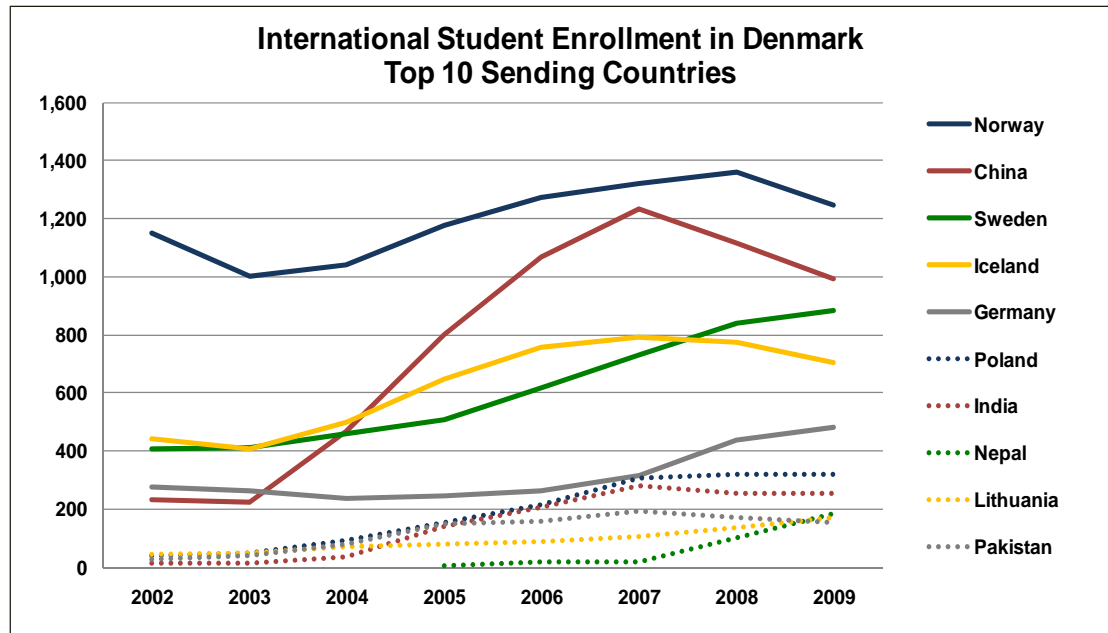
International Students

The number and origin of international students in Denmark has changed in response to the introduction of tuition fees for non-EEA students in 2006. The

following tables depict the number of international students from the top ten sending countries in absolute numbers and by year-over-year growth between 2002 and 2009.⁸

In the graph on the following page, international students in Denmark during the 2008-2009 academic year numbered 16,657, of which 8,758 were full-degree students and 7,899 were exchange students. With the exception of Nepal, all non-EEA countries experienced a decline after the introduction of tuition fees.

Total Enrollment of International Students in Denmark, 2002-2009

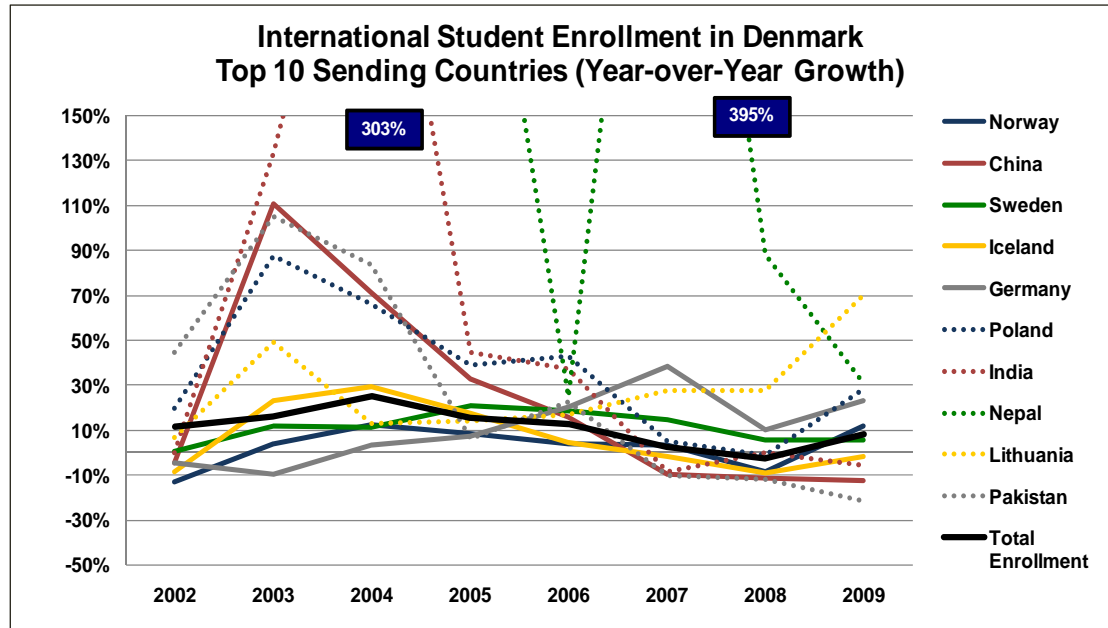


Source: IU.

In the graph below, year-over-year growth of non-EEA countries shows a decline after the introduction of tuition fees in 2006. China which had begun to decline in 2004 continued its downward trend along with Pakistan and India.

⁸ The following discussion of Denmark must acknowledge difficulties with data definitions, timelines, and a notable difference between national data as published by the Danish Agency for International Education (*Styrelsen for International Uddannelse*) and data kept by some universities.

International Student Growth (YoY) in Denmark, 2002-2009



Note: In order to adequately display Denmark's overall enrollment trends, the Y axis was capped at 150%. 2004 YoY growth for Indian students denoted 303% while Nepalese student enrollment grew by 300% in 2005 and 395% in 2007 respectively.
Source: IU.

The average annual growth rate before the introduction of fees was 16 percent which fell to two percent in 2007, negative two percent in 2008 and climbed again to eight percent in 2009.

The intake of international students shows the impact of the introduction of tuition fees on international student numbers most clearly. As shown in the following table, before the introduction of tuition fees, new non-EEA students numbered 1,274. This subsequently declined to 741 and made a slight recovery with 813 in the 2008-2009 academic year and 962 in the 2009-2010 academic year.

Intake of International, Full Degree Students, 2005-2009

| Origin | 2006 | 2007 | 2008 | 2009 |
|--------------|--------------|--------------|--------------|--------------|
| EEA | 1,733 | 2,030 | 2,477 | 1,975 |
| Non-EEA | 1,274 | 741 | 813 | 962 |
| Unknown | 41 | 7 | 3 | 2 |
| Total | 3,048 | 2,778 | 3,293 | 2,939 |

Source: IU.

Future Perspectives

Tuition fees have had a noticeable effect on the number of international, non-EEA students in Denmark overall. However, the size of the impact and the rate of recovery have been experienced differently, by different institutions. Some institutions have suffered minimally and have steadily re-grown their non-EEA students while others lost a large majority of non-EEA students and are yet to really recover.

One key strategy of some Danish institutions since the introduction of tuition fees has been to expand the number of exchange students in order to maintain some inflow of non-EEA students. As a result, Denmark has had a rising number of unbalanced exchanges resulting in 7,899 foreign exchange students in Denmark and 5,297 Danish students abroad during the 2008-2009 academic year (IU, 2010).

In early February 2011, the Danish Ministry of Education announced that it would be implementing new regulations in the existing university law of 1993 which would require that institutions balance their exchanges by requiring the same number of Danish students to leave the country as those coming from abroad. While this provision had been included in the original law, institutions were able to continue to receive non-EEA as exchange students since it had not been strictly enforced (Mykleburst, 2011).

While this measure has been suspended for the time being, Denmark's strategy to increase exchanges and the recruitment of EEA students poses challenges for diversity and Denmark's ability to recruit highly talented students.

Finland

Overview

Until the 1960s, Finnish higher education institutions were largely elite, highly autonomous entities. Between the 1960s and 1980s, the rising demand for higher education initiated reforms to unify the system and bring it largely under state control. However, a recession in the 1990s and its entrance into the European Union in 1995 drove major educational reform on all levels which included the introduction of performance-based management into the higher education sector (Risto, 2004).

In 1992 the Finnish government introduced a structural reform which still characterizes the system today. This reform divided the higher education system into two equal but separate branches: universities and polytechnics. This reform was largely aimed at meeting market demands for practically-oriented training while furthering the massification of higher education for society at large. While each “branch” (i.e. the polytechnics and the universities) has a distinct role, there have been “drifts” (e.g. increased “academic” offerings in the case of the polytechnics) toward one another as competition for funding and students have increased (Vossensteyn, 2008).

The two types of institutions confer different levels of degrees: polytechnics confer Bachelor and master’s degrees while universities confer Bachelor’s, Master’s and Ph.D. degrees. Currently there are twenty-five polytechnic institutions and sixteen universities. The universities are listed below:

- Aalto University
- Academy of Fine Arts
- Hanken School of Economics
- Lappeenranta University of Technology
- Sibelius Academy
- Tampere University of Technology
- Theatre Academy
- University of Helsinki
- University of Eastern Finland
- University of Jyväskylä
- University of Lapland
- University of Oulu
- University of Tampere
- University of Turku
- University of Vaasa
- Åbo Akademi University

The table on the following page provides a summary of Times Higher Education (THE) and Shanghai (ARWU) global higher education rankings of Finnish universities from 2005-2010.

Finnish Universities Ranked by THE-QS and ARWU, 2005-2010

| Institution | 2005 | | 2006 | | 2007 | | 2008 | | 2009 | | 2010 | |
|--------------------------|--------|---------|--------|---------|--------|---------|--------|---------|--------|---------|------|---------|
| | THE QS | ARWU | THE QS | ARWU | THE QS | ARWU | THE QS | ARWU | THE QS | ARWU | THE* | ARWU |
| University of Helsinki | 62 | 76 | 116 | 74 | 100 | 73 | 91 | 68 | 108 | 72 | 102 | 72 |
| Aalto University | N/A | 401-500 | N/A | 401-500 | N/A | 403-510 | N/A | 402-503 | N/A | N/A | N/A | 401-500 |
| University of E. Finland | N/A | N/A | N/A | N/A | N/A | N/A | N/A | 402-503 | N/A | 402-501 | N/A | 401-500 |
| University of Jyväskylä | N/A | 401-500 | N/A | 401-500 | N/A | 403-510 | N/A | 402-503 | N/A | 402-501 | N/A | 401-500 |
| University of Oulu | N/A | 401-500 | N/A | 401-500 | N/A | 305-402 | N/A | 303-401 | N/A | 303-401 | N/A | 301-400 |
| University of Turku | N/A | 203-300 | N/A | 201-300 | N/A | 305-402 | N/A | 303-401 | N/A | 303-401 | N/A | 301-400 |

Notes: In 2010, THE and QS became two separate ranking systems.
Source: ARWU, 2010. THE, 2010.

According to the Center for International Mobility's (CIMO) website, there are 102 English language degree programs at the Bachelor level, 223 English language degree programs at the master's level and 23 English language degree programs at the doctoral level.

Funding and Tuition Fees

In 1998, the Universities Act was introduced to provide greater "autonomy" to universities which included independence over organization and administration of teaching and research. This act also strengthened the performance budgeting practices introduced in the 1980 and 1990s. As a result, higher education institutions are funded through targets set in cooperation with the Ministry of Education. Institutions are subsequently required to keep extensive performance records in order to demonstrate how funds are allocated.

In 2005, the Ministry of Education created a committee to study the possibility of introducing tuition fees for non-EEA students (Helsingin Sanomat, 2005a). The committee recommended that tuition fees between EUR 3,500 and EUR 9,500 come into effect in August 2007. While the work of this committee influenced government thinking, tuition remained free for domestic and international students through 2009 (Helsingin Sanomat, 2005b).

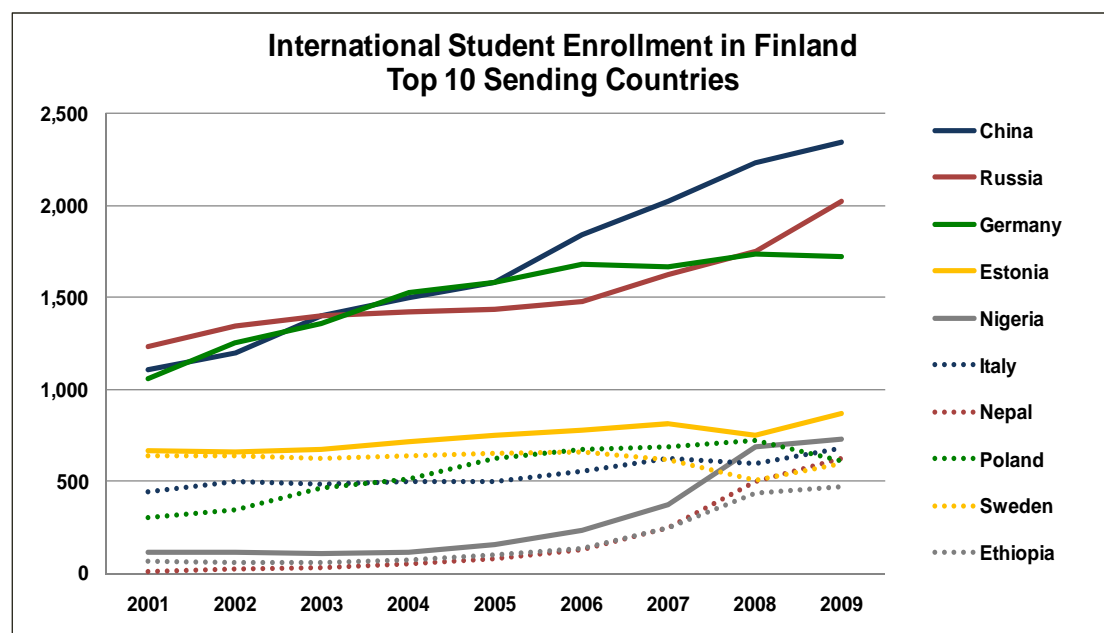
In 2009, the new Universities Act was introduced as a way to provide universities with more flexibility as well as to push them toward greater diversity in funding. The government included in the Act a five year trial period (2010-2014) in which some universities have the option to charge tuition fees for non-EEA master degree students.

Tuition fees can apply only to programs which are not available to domestic students. Institutions may decide from these programs which ones will carry tuition fees but must also develop a scholarship scheme. Over 130 degree programs across nine universities and 10 polytechnics could choose to introduce tuition fees during the trial period (Henriksson, 2010).

International Students in Finland

In 2009, there were 22,852 international students studying in Finland – 14,097 were full degree seeking students, while 8,755 were on exchange. The following graphs show total and year-over-year growth of international students in Finland between 2001 and 2009.

Total Enrollment of International Students in Finland, 2002-2009



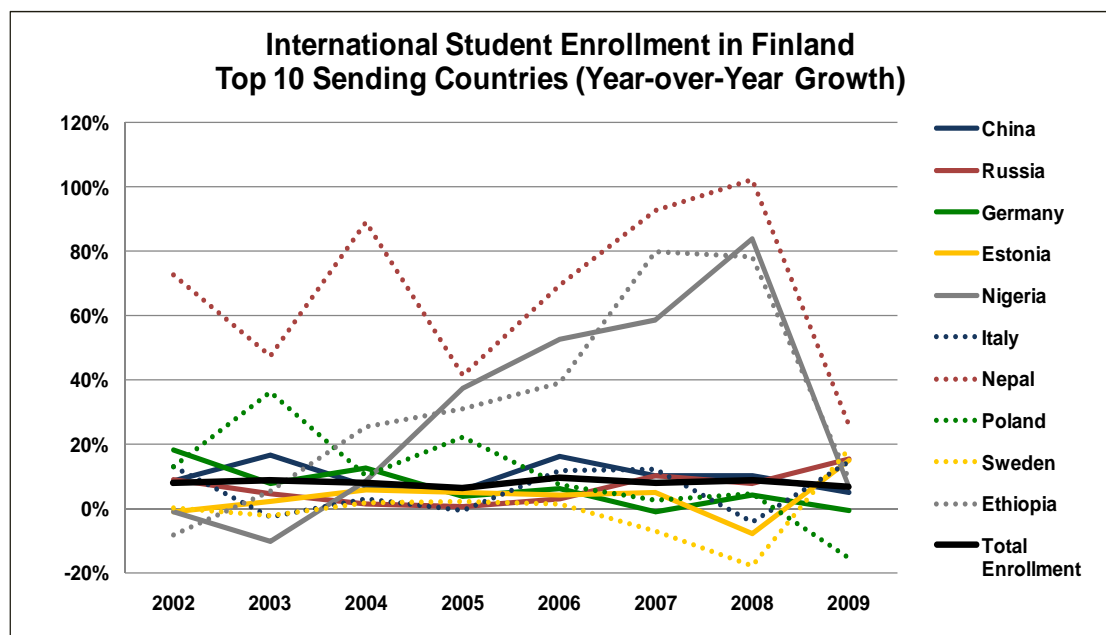
Source: CIMO.

The absolute number of international students has nearly doubled over eight years, growing from 12,373 in 2001 to 22,852 in 2009. In the above graph for 2009, the top ten sending countries composed 46.6 percent of the total

international students. In 2009, China was the largest source country for Finnish universities, with 2,105 full-degree students and 239 exchange students. Russia, the second largest, had 1,595 full-degree students and 425 exchange students.

In the graph below, Finland's year-over-year growth of international student enrollment has remained moderate, growing at an average of eight percent annually since 2002. Since 2006, full degree seeking students have grown on average 12 percent while the number of exchanges has grown by three percent during the same period.

International Student Growth (YoY) in Finland, 2002-2009



Source: CIMO.

Future Perspectives

Finland's tuition fee trial period affects a relatively small amount of international students – approximately 3,500 could be affected (Henriksson, 2010). While this time period is meant to allow institutions the opportunity to charge tuition fees for non-EEA students, experience in Germany has shown that in systems where it is possible to “opt out” of charging tuition fees – in Germany this has been done through the *Länder* – and still receive state financing, tuition fees are largely avoided. In 2006, Germany introduced tuition fees at EUR 1,000 per year. As of 2011, only two of the 16 *Länder* – Bavaria and Lower Saxony – will continue to levy fees (Topping, 2011).

While the debate about tuition fees has been occurring in Finland for some time, the introduction of tuition fees in Denmark and Sweden will undoubtedly effect the conversation in the coming years. If Finland decides to introduce tuition fees for non-EEA students at the end of the trial period, lessons from Denmark, Sweden and this limited trial will be an asset for institutional adjustments into the tuition fee landscape.

Norway

Overview

Norway's higher education system was small and disaggregated until the early 1960s when upward pressure for higher education provided impetus for reorganization and expansion of the system. Throughout the 1970s a binary structure developed as a number of regional colleges developed along with the universities. During the late 1980s the number of regional colleges began to challenge the health of the universities which prompted the government in 1990 to create a law which integrated the four universities and six university colleges into one sector.

Throughout the last decade, the government has introduced a number of New Public Management-like reforms as well as a degree system compatible with the Bologna process. The over-arching management of the system is decentralized to the institutions with centralized assessment and oversight by the government. The 1995 Education Act on Universities and Colleges provides each University Board and corresponding University or College Council oversight on all strategic planning and daily management of teaching and research insofar as it is in accordance with the national laws and regulations specified by the government.

Today, Norway's higher education system is composed of four major types of institutions: universities, specialized universities, university colleges as well as private university colleges. The eight universities are listed below:

- Norwegian University of Life Sciences (UMB)
- Norwegian University of Science and Technology (NTNU)
- University of Agder (UiA)
- University of Bergen (UiB)
- University of Nordland (UiN)
- University of Oslo (UiO)
- University of Stavanger (UiS)
- University of Tromsø (UiT)

According to the Norwegian Centre for International Cooperation in Higher Education (SIU) there are six English-language Bachelor degree programs, 220 English-language master's degree programs.

Listed on the following page are universities which have been ranked in the Times Higher Education and/or Shanghai Rankings since 2005.

Norwegian Universities Ranked by THE and ARWU, 2005-2010

| Institution | 2005 | | 2006 | | 2007 | | 2008 | | 2009 | | 2010 | |
|------------------------|------|---------|------|---------|------|---------|------|---------|------|---------|------|---------|
| | THE | ARWU | THE | ARWU | THE | ARWU | THE | ARWU | THE | ARWU | THE | ARWU |
| University of Oslo | 138 | 65 | 177 | 68 | 188 | 69 | 177 | 64 | 101 | 65 | 186 | 75 |
| University of Bergen | N/A | 301-400 | N/A | 301-400 | N/A | 305-402 | 227 | 303-401 | 144 | 201-302 | 135 | 201-300 |
| University of Tromsø | N/A | 401-500 | N/A | 401-500 | N/A | 403-510 | N/A | 402-503 | N/A | 402-501 | N/A | 301-400 |
| Nor. U. of Sci. &Tech. | N/A | 203-300 | N/A | 201-300 | N/A | 203-304 | N/A | 201-302 | N/A | 201-302 | N/A | 201-300 |

Source: www.awru.org, www.timeshighereducation.co.uk.

Funding and Tuition Fees

Institutions receive funding from four primary sources: the Ministry of Education, the national research council, contracted research, and industry. A majority of funding comes from the Ministry of Education which proposes budgets annually to the National Assembly and subsequently determines the number of students admitted to a given institution.

Currently there are largely no tuition fees in Norway for domestic or international schools in public education. There are some private higher education institutions which do charge tuition fees depending upon the level of funding they receive from the government, usually no more than USD 6,000 per year (Buffalo Graduate School of Education, 2008; The Norwegian Centre for International Cooperation in Higher Education, 2011).

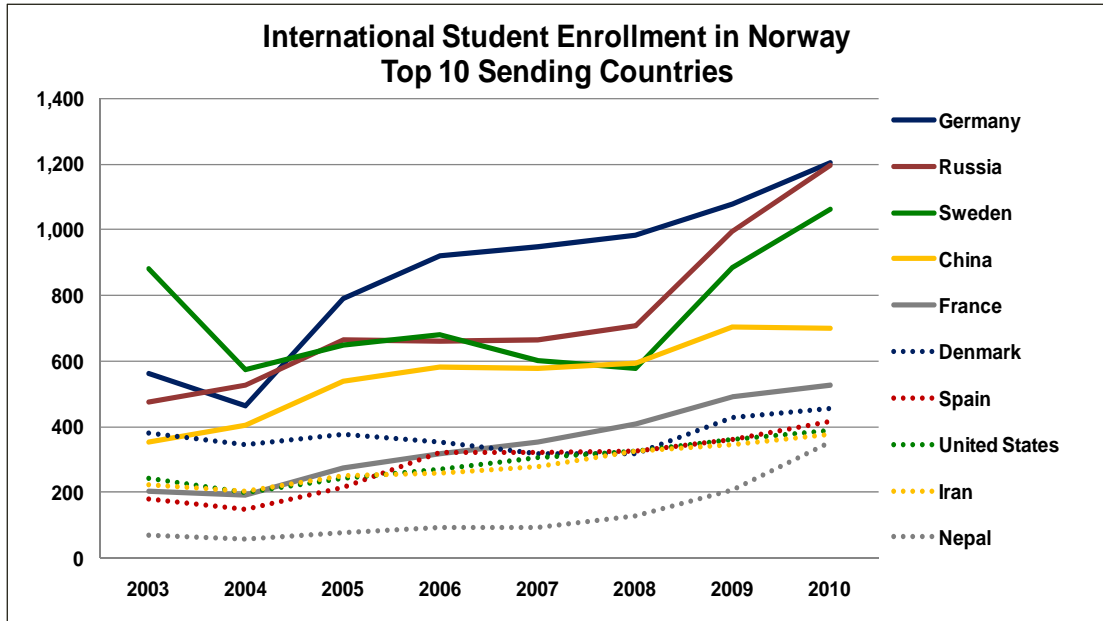
International Students in Norway

In 2010, there were 16,486 international students studying in Norway –12,020 were on exchange⁹. The following graphs below show total and year-over-year growth of international students in Norway between 2003 and 2010.

The absolute number of international students in Norway has increased from 9,918 in 2003 to 16,482 in 2010. Germany (1,204), Russia (1,198) and Sweden (1,063) were Norway's largest sending countries in 2010. In the graph above, the top ten source countries composed 40.5 percent of the total international student population.

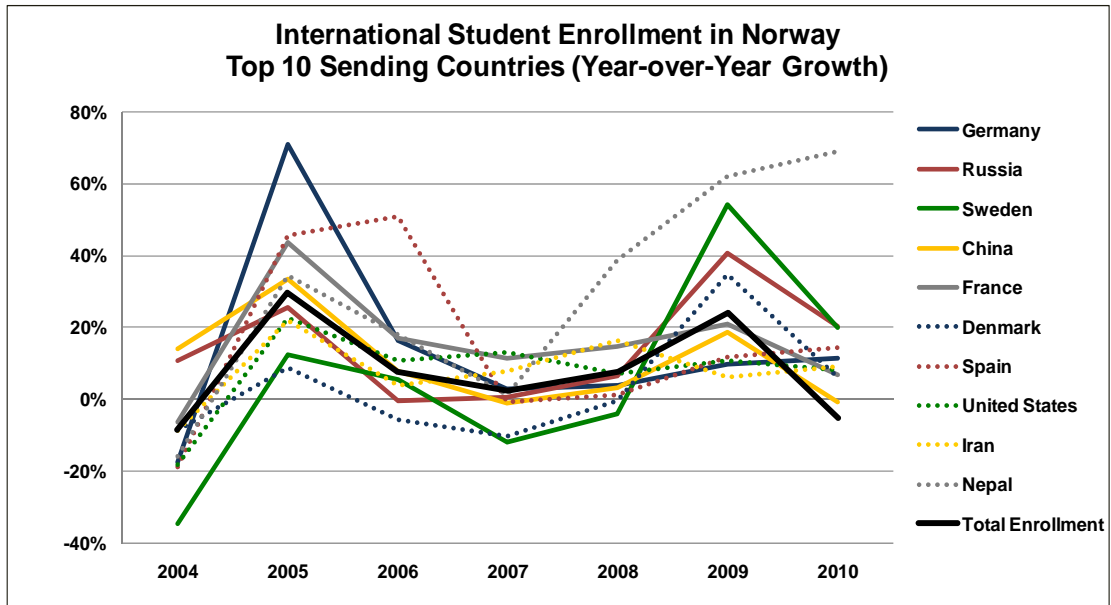
⁹ This number includes both exchange students as well as those who are part of the Norwegian government's quota scheme. This program is offered by the Norwegian Government to students from developing countries, Central and Eastern Europe, and Central Asia for studies at institutions of higher education in Norway.

Total Enrollment of International Students in Norway, 2003-2010



Source: NSD.

International Student Growth (Y-o-Y) in Norway, 2004-2010



Source: NSD.

The year-over-year growth for total enrollment shows a noticeable climb (30% growth) followed by a dip (8% growth) in 2006 and then a return upward tick (24% growth) in 2009, followed by a second dip in 2010 (-5%). The average

growth rate changed significantly from year to year, but averaged 8 percent annually between 2004 and 2010.

Future Perspectives

In 2010, the Christian Democratic Party (KrF) announced that given the introduction of tuition fees in neighboring countries as well as the growing demand for higher education in general it would be in favor of introducing tuition fees between EUR 6,000 and EUR 16,000 for non-EEA students. Norway's conservative political party, Høyre, stated that it wants to open a discussion on the possibility of fees given the likelihood Norway will see increasing inflows of international students with the introduction of fees across Europe (Brantenburg, 2010).

A survey jointly conducted by the Sentio Research Group on behalf of the Norwegian Student Organization (NSO) showed that 68 percent of students are against the introduction of fees for any students, while 18 percent would accept the introduction of a moderate fee – NOK 5,000 (EUR 630) per year. The current Minister of Research and Higher Education, Tora Aasland as well as the current head of Church, Research and Education in the Parliament, Marianne Aasen, have both opposed the idea of tuition fees for foreign or domestic students (Grytli & De Rosa, 2010).

The introduction of tuition fees for non-EEA students across Sweden, Denmark and to some extent Finland could begin to have an impact on the number of non-EEA students applying to study in Norway. Currently four of Norway's top 10 sending countries are non-EEA countries – Russia, China, the United States and Iran. Free-mover students from these countries will no longer be eligible for free tuition in other Nordic countries may consider Norway, which may further increase these sending pools.

Other sending countries such as Ethiopia (288), Pakistan (288), and India (193) whose student levels have been increasing in Norway in recent years and who were relatively large applicant pools in Sweden until 2010, could also grow more rapidly with the introduction of tuition fees in other countries. While these dynamics are difficult to predict, Norway's stance as one of the few remaining tuition-free study destinations will certainly bring new challenges to the current system.

Discussion

This section has brought together perspectives on the status quo and future outlook of tuition fee policies in Sweden's neighboring countries: Denmark, Finland, and Norway. Looking at the four countries together, there are clear similarities in historical development and policy which have made the nations historically comparable study destinations.

However, with the introduction of tuition fees in Denmark, Sweden and the trial period occurring within Finland, the value proposition amongst countries has become quite differentiated. While tuition fee levels within the countries remain reasonable by international standards (even with the region's high cost of living included), the existence of tuition fees within some countries and the absence within others will affect new regional dynamics going forward.

POLICY PERSPECTIVES: CONSIDERATIONS FOR SWEDISH DECISION MAKERS

Considerations for Institutional Leaders

Introduction

Since the introduction of fees, actors across Swedish higher education have experienced a number of changes and encountered a number of issues that are directly related to the changed landscape. As seen in the Lund case study in particular, given the limited time frame with which tuition fees were adopted, institutions have had to react in the short term to set tuition fees, adapt to a need for increased marketing and recruitment, shift institutional design, etc.

Going forward, institutional leaders will have a number of considerations, particularly as the full impact of tuition fees on non-EEA student enrollments becomes more known in the fall of 2011. Not only will leaders need to keep in mind up-and-coming future recruiting cycles, but also and more importantly, where an institution wants to be in the medium to long-term horizon (in five to ten years).

Long-term Internationalization Goals

A major consideration for each institution will be its long-term internationalization goals. In the context of tuition fees, long term internationalization goals include an institution's overall desire for the following:

- Recruiting fee paying students
- Recruiting "top talent"
- Creating and maintaining bilateral exchanges

These elements compose a portfolio of options for how an institution could focus its energy and resources. For some smaller institutions in Sweden, recruiting fee-paying students will not be a feasible strategy given the relatively large expenditure of resources needed relative to their current brand and international footprint. As a result, these institutions will have to consider to what degree internationalization is important for the strength and continuation of the institution as a whole.

Institutions facing such choices may phase out certain English language master's programs altogether (e.g.; following the introduction of tuition fees, Mälardalen University College reduced its number of English-language

masters programs), make some programs available only in English to combine both Swedish and international students, or utilize exchange programs to recruit non-EEA students.

For other institutions, recruiting fee paying students is a key priority for the sake of internationalization amongst the student body as well as for on-boarding “top talent.” These institutions which consider the recruitment of fee-paying students as a long-term internationalization goal will have to consider the investment level needed to facilitate desired goals.

These institutions will likewise have to consider their value proposition relative to their desired recruitment targets. This will include addressing course and program offerings by considering which existing English language master’s programs contribute to the internationalization of the institution and which should be phased out, and what if any new programs should be created or taught only in English.

Other considerations will be the expansion of additional offerings which either contribute to the learning process or assist in transitioning to the labor market. Such offerings include:

- Language training. Providing Swedish language learning programs and courses for those who are interested in working and or living in the Swedish context after graduation.
- Industry internships. Internships integrated within programs or in between programs to offer hands-on experience.
- Job placement. Either aligned with the internship or a separate placement after graduation.
- Career services. Assisting students with job searches within Sweden or within the international context.
- Exchange programs and dual degree opportunities. Providing opportunities for students to add to their international experience through exchange semesters and dual degrees.
- Upward coupling degrees. Providing opportunities for students to continue their studies into the PhD level.
- Alumni networks. Available and updated alumni networking information with international events.

Admissions Processing

A key consideration for those institutions which desire to recruit fee-paying students will be to address the issue of admissions processing. As

mentioned previously there are key issues associated with the current national admissions framework which fundamentally affect an institution's ability to recruit fee-paying students – time lining, processing time, and decision making.

As a result, institutions must now consider how they can either augment the national admissions system offerings to better meet their needs or construct their own local admissions processing for international students. Creating a locally run admissions system for international students could address the issues described above by allowing universities to control all aspects of the process. While a number of larger, research-oriented institutions would benefit from a local admissions system, a majority of institutions whose intake of international students is quite small could remain within the system with considerations such as an earlier locally or regionally run admissions round.

Considerations for Government Leaders

Introduction

The introduction of tuition fees and the autonomy bill simultaneously introduced a number of changes to the Swedish system which have already triggered a significant departure from previous policy practices. The following section outlines some considerations for the government in supporting and facilitating its stated goal of helping Swedish institutions to compete internationally. As with considerations for institutional leaders, while short-term recruiting cycles are important, developing a medium to long term perspective will ultimately be key.

Application Fees

At SEK 900 (EUR 100) as compared with EUR 40 – 60 internationally, this fee likely acts as a preventative barrier for potentially interested applicants. Evidence from the fall 2010 application cycle indicates that only 5,600 of the 20,100 non-EEA students who began an application completed it with payment by the 28 January deadline. A payment rate of only 28 percent is unusual in most universities as the application payment and application process are usually combined.¹⁰

Lowering the application fee and providing more flexibility in how it is administered will be critical for Sweden going forward. As a static fee of SEK

¹⁰ The Swedish admissions process is segmented into three main parts: 1) An on-line registration which takes 15-18 minutes and requires some personal information and program selection; 2) Hard copies of academic records and transcripts must then be air mailed; and 3) Payment (for non-EEA students) must be received either by credit card or bank transfer.

900 there is little ability for institutions to respond to fluctuations in exchange rates or inflation in the coming years. Furthermore, if institutions desire to run their own local admissions system, they will still be bound to the fee of SEK 900 per applicant. As a result, institutions will either continue to lose out on potential applicants or will be hassled to find a way to provide “application fee scholarships” to maneuver around the fee.

Implementing a National Target Country Strategy

Given that Sweden is a small country with a relatively small recruiting footprint – 1.0 percent of international tertiary students worldwide – focusing recruitment efforts and resources will be a tool for strengthening Sweden’s pool of potential applicants (OECD, 2010). In order to focus national resources on increasing Sweden’s higher education brand recognition abroad, a national target country recruiting strategy should be implemented. Such a strategy would entail increasing marketing and recruitment as well as diplomatic efforts in a select number of countries.

Increased National Marketing

Complimenting a more defined national target country strategy will be increased marketing and recruitment efforts. While national marketing and recruitment efforts can take many forms, successful international education destinations like Australia and New Zealand have leveraged a number of outlets. Such efforts include a strong country portal, extensive higher education networking, a solidified national image campaign, etc.

CONCLUSION

Policy Impacts

Determining whether or not the Swedish government has achieved its stated goal with the introduction of tuition fees – to allow Swedish institutions to compete globally on the basis of quality – can only be determined in the coming years as Sweden establishes itself as a tuition-fee destination. However, the first quantitative affects of the introduction of tuition fees and application fees is that Sweden went from 91,788 international applications for the 2010-2011 academic year to 26,846 international applications for the 2011-2012 academic year – a loss of more than 70 percent. Altogether 2,929 fee-paying students have been accepted across Sweden (VHS, 2010).

Given the vast number of policy changes, predicting admit to enroll yield¹¹ rates based on past performance is nearly impossible. To provide a perspective, however, of what could be expected, international student admit to enroll yield rates in private and public universities in the United States during 2010 ranged from 29 – 35 percent (Noel-Levitz, 2010). Such rates applied to Sweden could mean an *admit to enroll* yield rate between 850 – 1,050 non-EEA students for the 2011-2012 academic year – a roughly 66.5 percent reduction in admitted non-EEA students from 2009.

Broader Perspectives

While long-term impact is not yet known, the introduction of tuition fees has provided some interesting perspectives on the interaction between a major national higher education policy change and the subsequent implementation of that policy. This thesis has outlined some of the specific issues which were triggered by the introduction of tuition fees. However, there are also underlying characteristics in national higher education frameworks which have shaped responses within the system. Outlined below are three broad factors within the Swedish national higher education system which have influenced the implementation of the tuition fee policy.

Autonomy and Organizational Design

Sweden, particularly in comparison to other continental European nations, has greatly increased institutional autonomy in higher education regarding employment decisions, admissions criteria, spending, etc. However, while there is relatively high autonomy regarding these issues, strategic decision

¹¹ The admit to enroll yield rate divides the number of students who actually begin classes at the start of the term by the number of students who were accepted for the term.

making has largely remained at the national level. Additionally, the national higher education support institutions were created to support the entire system with much of the decision making done collectively. Low autonomy for strategic decision making together with consensus-oriented support institutions has created an environment ill-equipped to make the rapid changes necessary to smoothly introduce tuition fees.

Incentives for Change

For the Swedish higher educational system as a whole, the introduction of tuition fees has been set against the backdrop of SEK 2 billion of budgetary surpluses for higher education institutions (HSV, 2010) growing numbers of prospective international students as well as eleven out of twenty institutions conferring postgraduate degrees being ranked in international ranking lists in the last 5 years (see Sweden's International Education Rankings, page 13). While interviews with faculty members and administrators showed a desire to recruit more talented students, such desires have not created a strong impetus for change. The introduction of tuition fees has thus been seen as a largely top-down movement with little tangible incentive on the institutional level for sweeping reform.

National Cultural Preferences

Sweden has seen the introduction of a number of neoliberal policies in the last decade including the privatization of state pensions, schools, healthcare, public transport, and post offices which have led Sweden to become one of the leading free market oriented economies in the world (KOF Swiss Economic Institute, 2010). While these reforms have evidenced that the traditional "Swedish model" – one of the largest, most encompassing welfare states – has evolved in recent years, the cultural preference for traditional welfare state provisions like health care and education remain strongly ingrained. Desire to provide higher education as a form of foreign aid and fear of tuition fees being applied to domestic students – following developments in the UK – have perpetuated a strong opposition to the introduction of fees.

Going Forward

This thesis has sought to provide an analysis of the introduction of tuition fees in Sweden by looking at the policy changes, subsequent issues triggered by the changes, and the various institutional responses which have occurred in the first 14 months since the introduction of the tuition fee bill. This thesis has also tried

to provide a broader perspective on tuition fees in higher education systems through a snapshot of tuition fee policies in Denmark, Finland, and Norway as well as overarching issues within the Swedish higher education framework (autonomy and organizational design, incentives for change and national cultural preferences) listed above.

While nationally organized, Sweden has a complex higher education landscape with a number of actors and institutions which have all undergone a series of changes in the last 35 years. The introduction of tuition fees for non-EEA students, while still in its infancy, coupled with other recent reforms like the autonomy bill, marks yet another major change for the Swedish system. The introduction of tuition fees for non-EEA students is a policy change which, as already evidenced, brings a fundamental paradigm shift to the higher education system. Issues ranging from strategic institutional policies affecting student recruitment to national policies affecting immigration and visas become key competitive mechanisms in the wider global competition landscape.

Thus far, the Swedish higher education sector as a whole has reluctantly begun to address issues regarding the introduction of tuition fees for non-EEA students. Going forward, the success of the Swedish higher education sector in accomplishing the goals laid out by the government – to compete globally for talented students on the basis of quality and not free tuition – will be highly dependent on Swedish institutions becoming active participants in the global education market. Thus, the degree to which the Swedish government encourages and allows higher education institutions to actively engage in the global competitive landscape, and the degree to which Swedish institutions embrace that ability will have decisive affects on the Swedish higher education sector in the future.

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