

I. AIMS AND FFATURES OF THE SURVEY.

The TRESAL survey had the following objectives:

- i) to gather opinions regarding the importance of and advances in major topics concerning Latin American higher education over the past decade from the perspective of universities, their professors and students
- ii) to evaluate the extent to which these changes have affected higher education.

The results were expected to strengthen institutions, help build the Latin American Higher Education Area, and contribute to cooperation in education, culture and science between Latin America and Europe.

The TRESAL survey was composed of three interconnected questionnaires:

- Q1. Questionnaire for university leadership and higher education institutions (HEI) about quality, governance, autonomy, teaching, learning and internationalisation
- Q2. Questionnaire for professors of HEI about trends in teaching and learning, quality, engagement, mobility, internationalisation and network collaboration
- Q3. Questionnaire for students of HEI about responsiveness of universities and quality of preparation received in institutions and their educational environment, the labour market, mobility and recognition of studies.

The questionnaire had a multiple choice format. It was an online survey, which enabled grouping, processing and comparing data easily. In addition to the closed questions, the questionnaires also had space for open answers and comments.

■ II. SCOPE OF THE SURVEY

In terms of the sample, an invitation to participate was sent to lists of Latin American HEIs that were provided by the different national university associations participating in the Alfa PUENTES project. The objective was not to achieve a comprehensive response rate, but rather to have a representative sample of the different types of HEIs in Latin America and their geographic distribution. The survey was answered by 150 institutions, as well as 1 568 professors and 7 672 students from those institutions.

In addition to a cross-regional analysis, the data was grouped into four sub-regions, mirroring the regional division of the Alfa PUENTES project: Central America, the Andean Community, Mercosur and Mexico.

It is important to point out that the respondents from Mercosur and the Andean Community are only representative of some of the countries that compose the sub-region and not of the sub-region as a whole. The sub-regional division was nonetheless maintained in order to be consistent with the project and survey's intentions, and to demonstrate certain patterns in the sub-regional trends. In this respect, the survey was the first of its kind.

■ III. MAIN TRAITS OF THE INSTITUTIONS IN THE SAMPLE

The institutional sample was largely representative of the type (public or private), size and orientation of Latin American universities.

61% of the institutions were founded between 1950 and 1999 and 19% between 2000 and 2010. Only 12% was founded in the first half of the 20th century and less than 7% before then.

51% of the institutions claimed to be financed by tuition fees and other sources, 36% declared to be state funded and 8% were financed by both private and public sources. The rest did not reply to this question. 45% of the institutions that responded declared to be public institutions, whereas the rest claimed to be private.

NATURE	INSTITUTIONAL LEADERSHIP	PROFESSORS	STUDENTS
Public	67	853	3757
Private	83	715	3915
Total	150	1568	7672

Respondents of the TRESAL survey

As for the profiles of the institutions, 54% said there was a balance between teaching and research; 42% said to be teaching-oriented and only 3% was research-oriented.

■ IV. CONCLUSIONS

IV.1. Activities and interest in the development of HEI in Latin America

The survey results showed a great amount of activity and interest in developing higher education in the respondents' institutions and in their countries, and also in Latin American sub-regional and regional cooperation.

According to the results, changes that have taken place in Latin American higher education institutions over the past five years are considerable. More than 40% of the university leaders who replied considered 12 of the 14¹ different strategies listed in the survey as "very important" and more than 60% considered them at least "quite important". Topics such as *evaluation and quality accreditation and reform in quality assurance systems* were the most selected, and considered "very important" by over 80% of the HEI leaders who replied.

¹ Respondents could choose from 14 different strategies: internationalisation, collaboration with neighbouring countries, regional integration processes in higher education, growth in the importance of research and innovation for the development of national capacities, reform in quality processes and systems, reforms in the governance of institutions, reforms in funding, interest in improving the position in rankings or comparisons between national and international higher education institutions, support from international donors to academic programmes or academic cooperation, demographic changes and higher demand of higher education, university-enterprise relations/socio-economic context, student life, curricular reform/structure, evaluation and quality assurance.

IV.2. Traditional quality vs. strategic quality

Quality has been a core issue in Latin American higher education over the past years and important improvements have been made in HEI. However, quality evaluation processes in general have focused more on traditional academic and regulatory aspects as opposed to new priorities (innovation in teaching and learning, for example).

Only one fourth of the institutional leaders replied that their strategies have been carried out "very intensely and with high quality", while almost half of them said that quality, in general, needs to be improved. Although quality assurance processes are taking place, with universities and their programmes undergoing internal and external evaluations, issues such as teaching and learning, curricula content and structure and innovative learning approaches have not received much attention.

In general:

- HEIs in the Andean Community and specifically Colombian universities have more confidence in their institutional quality assurance methods - which include student evaluations of professors and services as well as a higher participation in external evaluation processes than other Latin American universities surveyed.
- Central America is the region with the highest participation in international quality assurance/evaluations
 provided by international bodies, which can be due to the fact that regional evaluation agencies developed
 before the national ones.
- 71% of leadership of private HEIs responded that their institutions use internal procedures for the evaluation of study programmes compared to 55% of the leaders of public institutions.
- University leadership considers that the factors that contribute most to increasing quality of education are: a strong relationship between teaching staff and researchers, well-developed human resources, and better quality systems. Interestingly, the least important factors (though not unimportant) are: greater international cooperation and ICT improvements.

Answers show a need for developing the evaluation of professors, although two thirds of the leaders said that this practice is already in place (in half of the private institutions and in one third of the public institutions). An interesting result is that 78% of private institutions *carry out questionnaires to evaluate their professors*, whereas only 67% of the public institutions claimed to carry out such surveys.

Although a high number of institutions claimed to be interested in research evaluation processes, only 40% of the private institutions and 36% of the public indicated that they presently carry out research evaluation.

The results show that higher education in Latin America is still very focused on undergraduate studies. Although the offer and enrolment in doctoral programmes have increased over the past years, the number of PhD students in the region is still low (with the exception of Brazil) compared to the number of PhD holders in Europe.

IV.3. University priorities, yesterday and tomorrow

According to the responses of university leaders, the three changes or factors that have influenced HEI development strategies the most over the past five years are: evaluation and quality assurance, reform in the quality processes and systems and curricula reform. For the upcoming five years, demographic changes and internationalisation, research capacity and links between university and business are high on the strategic priority list. Reform in the quality processes and systems becomes less of a priority, especially in the Mercosur region. However, evaluation and accreditation are still high on the priority list in all regions.

In terms of the sub-regions, Central America and Mexico consider that *reform in degree and curricula structure* will be a top priority of HEIs (89% of university leadership in Central America and 77% in Mexico stated that it will be "very important"), whereas the Andean Community and Mercosur consider it less important (only 59% and 51% respectively, consider it will be "very important").

Mercosur stands out as the sub-region least concerned about possible university funding reform and claims to have the least autonomy when it comes to selecting students.

IV.4. Discourse and reality in teaching and learning

The results show that the discourse on competence-based approaches in teaching and learning is gaining ground: almost 76% of institutional leadership, 77% of professors and 84% of students indicated that *a competence-based approach has been incorporated in all courses/subjects*.

However, replies also indicate that only one third of leadership and professors think that this approach *has been incorporated in all courses*. While two thirds of the professors said they had to *reformulate their teaching plans to incorporate competency-based learning*, the remaining third did not answer or claimed not to know if there had been a change.

What is more relevant is that, although a high number of respondents said a competence-based approach has been incorporated in some courses/subjects, the number of those claiming that it has not been expressed in credits is just as high.

This reflects the difficulties that still exist in Latin America to develop competency-oriented teaching and learning and enhance the recognition of learning experiences.

Slightly over one third of university leaders stated that their institutions only recognise studies when its equivalence can be analysed as a *component of the study programme*.

IV.5. Teaching support tecnology vs. new ICT learning strategies

Using new ICT (information and communications technology) tools for conventional teaching or for teaching-learning processes are strategies chosen by two thirds of the respondents (leaders), although they claim that *quality improvements are needed*.

However, *part-time distance learning courses* (blended learning approaches) are only provided by one third of the universities and *full distance learning courses* by only one fourth.

There are different viewpoints from private institutional leaders and public ones. Leadership from private institutions highlights the importance of using ICT tools in conventional teaching (79%), whereas only 69% of public institutional leaders considered these methods important.

IV.6. Alliances for transformation

Cooperation with other higher education institutions and with businesses is one of the top priorities for Latin American universities in the next five years. Results show an increase in the awareness of the need to build quality learning for human and social development collectively with public and private partners.

University leaders and professors agree on the importance of *new guidelines for degrees* and *curricula restructuring*. The need to develop interdisciplinary and cross-sectoral project management skills was valued more by students than professors, though neither placed it on top of the priority list.

Participation in professional associations to design curricula and remodel study programmes was only selected by two fifths of leaders of private institutions and by less than one third of public institutions.

When speaking of links with society, a little less than half of the university leaders and half of the students mentioned the existence of collaboration for research and innovation between their institution and public or private organisations.

In addition:

- Few HEIs said they tracked alumni: 37% for undergraduates, 18% for those with Masters and 9% for PhD holders.
- 43% of HEI leaders said that their graduates found work in the six months after graduation, but 34% of them said that jobs were not related to their degree.
- HEIs in Mercosur considered the labour market more open to graduates, whereas in Central America a higher number of respondents claimed that personal and family relations were especially important in getting a job. In this sub-region there tends to be more tenuous university-business relations historically.

IV.7. Towards better recognition of studies

All sub-regions (except Central America) indicated that governments have degree and diploma recognition tools for students from other countries. However, admission of foreign students is an institutional decision, normally managed through a central office, but sometimes (especially in Central America) it is done at faculty or school level.

They also indicated that one of the main challenges for academic recognition of mobile students is the *lack of clarity in the students' documents*. Although there have been efforts to implement *procedures for study recognition, qualifications and diploma validation*, there is room for improvement, particularly in enabling international mobility.

A larger percentage of university leaders replied that recognition of studies "varies" or is "difficult". Among the strategies to support mobility, *qualification frameworks*, *credit systems and diploma supplements* were mentioned. Almost four fifths of university leaders expressed that they have national degree frameworks, although they are not developed enough to be compared at a regional or international level. These frameworks are tools to define the diplomas offered in the country. Diploma/degree frameworks are different to qualifications frameworks because they do not include information about learning outcomes/expected competences to be acquired after each level of study has been completed, nor are the learning outcomes/expected competences structured by level in a sense of explicit progression.

There have been advances in the use of academic credits. However, the proportion of respondents stating that credits depend on the number of face-to-face class hours was similar to that of those who claimed it was based on students' workload. Two thirds thought a common academic credit system would facilitate mobility in the region.

IV.8. More information and support for Latin American mobility

A third of the university leaders said that additional documents are not provided for diplomas and *there are no plans to do so*, although a third of them acknowledge the lack of clarity in students' documents.

Only two fifths of university leaders from public institutions and one fifth of those from private institutions claimed that their institutions were not attractive to foreign students, although there has been an increase in mobility of students from abroad to their institutions.

Only one third of university leaders said that there is information available at their institution about study programmes at other institutions. Only two fifths of the students that responded reported having received this information.

Almost half of the university leaders said that mobility was essential for internationalisation. One fifth considers it to be a crucial factor for success in the labour market.

One of the main advantages of a wider integration in Latin American higher education, as stated by Mercosur and the Andean Community, is that it would allow for *greater cooperation and better quality of research*. However, 75% of Mexican HEIs expressed their concern that this integration would lead to a standardisation of higher education.

The preferred destinations for Latin American students are the United States of America, Canada and Europe, in that order. For some sub-regions, Europe is the first option and their own sub-region is also seen as a priority (in Mercosur for example). These results are an example of the potential for growth in mobility and cooperation within the Latin American region. The modest rise in interest in Asia and Australia should also be noted. In students' responses, interest in studying abroad in other regions is as follows: 12% in Australia and New Zealand and 11% in Asia, in comparison to 18% in the US and Canada and 17% in Europe.

42% of leadership expect the number of incoming students to increase, with differences in each sub-region: 67% in the Andean Community, 51% in the Mercosur, 36% in Central America and 28% in Mexico.

IV.9. Enhancing the vision and managment of internationalisation

The main reason for internationalisation is to strengthen academic activity, however only one tenth of the leadership that responded considered it was strategic to improve and maintain an international perspective at the institution.

Regarding to what extent internationalisation has been streamlined in the institution, one tenth of university leaders replied it was "very streamlined" and two fifths that it was "sufficient".

Only one third of university leaders claimed to have joint Master programmes, a recent trend in international collaboration.

IV.10. Gender and inclusion

Although in the labour market the number of women is similar to the number of men, there is a difference of opinion at a subregional level about whether women are enabled to succeed academically. In general, 41% of university leaders agree: 54% in the Andean Community, 50% in Central America, 36% in Mexico and 29% in the Mercosur.

Regarding inclusion, university leaders claimed there were equal opportunities for female students (76%), students with low income (73%) and ethnic minorities or members of indigenous communities (60%). For this last datum, there is an important regional difference; Mexico seems to be more inclusive of ethnic minorities or members of indigenous communities than the other sub-regions (68%).

University leaders disagree on whether universities restrict access to people with limited mobility (71%). Results implied that, although there are no regulations on this topic, institutions do have barriers due to the lack of adequate infrastructure to access buildings.

When asked about access for students with limited mobility, many leaders replied "I don't know" or did not reply (between 22% and 34%).

V. LATIN AMERICAN HIGHER EDUCATION AREA

Development in Latin America requires higher education systems that can expand while at the same time increasing quality, responsiveness and equity; for this reason, a common higher education area should be on the academic agenda. This would, amongst other benefits, facilitate cooperation and exchange, enhance the relevance and responsiveness of degrees and qualifications and ultimately reduce the social gaps in the region.

Respondents spoke about their expectations, concerns and general opinions on the Latin American Higher Education Area. This information and the results to the survey can be found on www.tresal.org.