Opportunities for Trading Education Services from CARIFORUM to the Selected Countries in the European Union

Prepared for: Caribbean Community Secretariat
Prepared by: Larry Placide, Ideas to Business Limited (Trinidad and Tobago) and Mark Beresford, Kinetic Cubed (U.K.)
Email: lplacide@icloud.com

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Scope of Work

The scope of work for this project is included in the Terms of Reference. It indicates that the expected outcome from this consultancy would include a discussion of the following areas: -

- Overview of the sectors in CARIFORUM and in the EU
- Analysis of the EPA in relation to the sectors
- Individual State and Sector analysis, in particular a market analysis
- Review of the trade by all the modes, in particular modes 2, between the selected States in the selected Sectors, this should include:
    1. Collection and presentation in a comparative manner of all publicly available statistics on trade in services (imports and exports) for:
        a) All the CARIFORUM countries with the selected European Member States in general; and
        b) disaggregated data on bilateral trade in services (imports and exports) for each of the CARIFORUM countries with each of the selected European Member States over the most recent eight-year period in particular.
- Opportunities for trade in Services in the selected States in the selected Sectors
    1. Use of Services in the region, enhancing the sectors to attract for export;
    2. Joint venture opportunities
- Framework for conducting business
- Regulatory and administrative framework for supplying services
- Key findings and recommendations for development of the sectors to take advantage of opportunities under the EPA

Seven (7) EU Member States have been identified for particular focus. These are: -

1. Estonia
2. France;
3. Germany;
4. Italy;
5. Malta;
6. Netherlands;
7. Spain; and
8. UK

Introduction and Methodology

For the purposes of this paper, Education Services are taken to include the services activities at Division 92 of the Central Product Classification (CPC). This classification system has been chosen due to its use by CARIFORUM and by the EU during the negotiation of the Economic

Partnership Agreement. In this regard, Education Services is defined as comprising the following: -

921		Primary education services			
	9211	92110	Preschool education services	8010	
	9219	92190	Other primary education services	8010	
922		Secondary education services			
	9221	92210	General secondary education services	8021	
	9222	92220	Higher secondary education services	8021	
	9223	92230	Technical and vocational secondary education services	8022	
	9224	92240	Technical and vocational secondary school-type education services for handicapped students		8022
923		Higher education services			
	9231	92310	Post-secondary technical and vocational education services		8030
	9239	92390	Other higher education services	8030	
924	9240	92400	Adult education services n.e.c.	8090	
929	9290	92900	Other education services	8090	

In particular, this paper focuses on the provision and trade of Higher Education Services, Adult education services not elsewhere covered and to some extent, Other educational services. It also includes, particularly in the statistical analysis personal education-related travel. Primary and secondary education services are traditionally restricted, with heavy public sector activity and minimal private sector activity in trading these two levels of education services.

As far as modes of trading services are concerned relating to educational services, we have noted the work of Nigel Healy relating to the various modes of supply from the General Agreement on Trade in Services (GATS) as follows[1]: -

Mode 1 — Programme mobility: universities supplying educational services across borders directly to students in their home countries, via distance-learning. 'Under this mode, there is no physical movement of the sellers or consumers, but the service itself travels' (Tilak, 2011).

[1] Definitions and Estimates of the Size and Shape of UK Transnational Education, April 2013, Nigel Healey, Nottingham Trent University

Historically, distance-learning was carried out using correspondence courses (eg, the University of London, which has been providing international distance learning degrees since 1858). Since the advent of the internet in the early 1990s, correspondence, textbook-based courses have been steadily replaced by on-line provision. In pure Mode 1 provision, the university has no physical presence in the country of the student. The recent growth of Massive Open On-line Courses (MOOCs) exemplifies Mode 1 provision, in which anyone with an internet connection can enrol in an on-line course at a major US university.

Mode 2 — Student mobility: students consuming the education services by moving to the country of the university. Over the last two decades, international student mobility has been the dominant form of transnational education. Over 3 million students study on the campus of a foreign university and such 'export education' is a major source of invisible export earnings for countries like Australia, New Zealand, the UK and the United States.

Mode 3 — Institutional mobility: universities supplying educational services to students in their home countries through an in-country service provider. This in-country presence may range from a local college, which offers a university's degrees on a franchised or validated basis (see below), to the university establishing an international branch campus (IBC) to teach students in a foreign market. The University of Nottingham, with IBCs in Kuala Lumpur (University of Nottingham Malaysia) and Ningbo (University of Nottingham Ningbo), provides one of the best-known examples of Mode 3 provision, but there are hundreds of smaller operations across China, Malaysia, Singapore and Hong Kong, for example.

Mode 4 — Staff mobility: universities sending staff abroad for short periods to deliver education services to students in their home countries. This form of mobility, known as fly-in fly-out (FIFO) in industries like mining where it is commonplace, involves staff going to the students, but unlike Mode 3, the staff may be away from their own universities for short periods from a few days to a couple of weeks and the universities have no permanent physical presence in-country, often using rented space in a hotel or partner university.

The study has been compiled predominantly through desk research. The authors were based in the Caribbean and in the United Kingdom. The authors accessed information available within the respective regions, including policy documents of public institutions and national education authorities.

Overview of the Sector in CARIFORUM

The Education Sector in the Caribbean in the area of tertiary education is characterized by one dominant institution in the Anglophone Caribbean (The University of the West Indies), a concentration on medical education largely by foreign investors and a large number of universities in CARIFORUM's largest country, the Dominican Republic. The main target for those involved in education services trade has been the United States whereas the University of the West Indies has concentrated on meeting the tertiary education needs of CARICOM Member States, almost as a public service.

The region's traditional education sector led by the UWI was minded of the trade element in the field of education by the discussion of several years ago about the Education Services commitments of Jamaica in the WTO. The discussion centred around whether the commitments had the unintended consequence of opening the public education market to external providers. The discussion led to the explicit public sector institution exclusion undertaken by CARICOM countries within the Economic Partnership Agreement. It is relevant to note, though, that the sector has by-and-large not focused on education services **trade** although there have been minimal amounts of students from outside the Caribbean at all of the campuses.

Most of the education in the CARICOM is public sector. However new entrants, primarily from the United States and thus private sector, are engaged in services exporting. Mode 2 is the dominant export mode, as is the case elsewhere.

Most of the trading has involved the medical schools established in a number of countries in the Caribbean. These schools have gained both numbers and customers in the last ten years as the competition for places in schools in the United States has increased even as the prospective demand for these professions is projected to continue to grow. As will be seen later, there have been minimal numbers of consumers from Europe and these have tended to be those students interested in settling and practising in North America.

These medical education institutions tend to have minimal levels of interactions with the authorities other than for purposes relating to accreditation or the facilitation of their students. It may not necessarily therefore be a simple matter to engage them on matters relating to trade policy. However, and bearing in mind physical spatial limitations that may exist, it is unlikely that these institutions would not be interested in increasing their customer bases to include more Europeans. For Europeans, a possible attraction is the length of time required to complete degree studies. A promotional booklet from the Windsor University School of Medicine cites "additional 2 years course requirements by many European and Asian countries like compulsory internships, community work to graduate. US and Canadian schools do not require the same and Windsor in St Kitts follows strictly US and Canadian requirements. It takes

6 to 8 years to graduate from European and Asian countries and 4 years to graduate from US, Canadian and Caribbean schools".[2]

A concept paper developed for the CARICOM Secretariat several years ago reviewed the tertiary sector in the context of the development of a Strategic Plan for Services within the CSME. The paper recommended a number of imperative actions[3]: -

- Development of a Strategic Plan for the sector in CARICOM
- Alignment of a strategy with the regions trade, investment, diversification and development goals
- Setting of a minimum target of 35% participation in the tertiary sector by 2020
- Negotiated agreements between each country and the University of the West Indies on numbers top be admitted annually
- National plans to meet the participation targets including new domestic and foreign investments
- Strengthening of national capacities and improvement of local standards
- Use of various methods to deploy throughout the region "excess capacity or highly specialized capacities in Agriculture, Veterinary Medicine, Pharmacy, Engineering, Information Technology, and Trade negotiation Skills.
- Establishment of a Regional Accreditation Agency
- Rationalization of the tertiary sector in each country
- Rationalization of the tertiary sector across the region to create "complementary, supplementary and feeder relationships between national systems and the regional University of the West Indies"
- Use UWI to strengthen the regional system
- Improve quality of students by strengthening the primary and secondary education sectors
- Address financing issue
- Rationalization of the e-learning strategy
- Improving the research activity in the region.

The University of the West Indies (UWI)

The University of the West Indies has campuses in Jamaica, Trinidad and Tobago and Barbados. Fifteen Caribbean territories contribute to the University of the West Indies. Guyana is the only CARICOM country that does not contribute to the UWI system. Its overall objective is to be "a globally recognized, regionally integrated, innovative and internationally competitive university deeply rooted in all aspects of Caribbean development."[4] In the academic year 2011/2012 enrollment reached a record of 45,877, 24.4% increase over four years. Post graduate enrollment increased by 30.2% in that same four year period,[5]

[2] Windsor University School Promotional Booklet - http;//www.windsor.edu/windsor_brochure.html
[3] Concept Paper for the Development of a CARICOM Strategy for Tertiary Education Services in the CARICOM Single Market and Economy (CSME), Pg 20-21.
[4] Annual Report 2011/2012 University of the West Indies, pg. 6
[5] The University of the West Indies Strategic Plan 2012-2017, pg. 10

The Cave Hill (Barbados) Campus had 4065 full-time and 4277 part-time students enrolled in the academic year 2009/2010[6]. It offers 43 undergraduate degree programmes and Masters and Ph.D degrees through its five (5) faculties - Law, Medical Sciences, Social Sciences, Humanities and Science and Technology.

The St. Augustine campus has faculties in Education, Engineering, Food and Agriculture, Humanities, Law, Medical Sciences, Science and Technology and Social Sciences. The University has begun tentatively to reach out for additional foreign students. The Principal of UWI in St. Augustine, Trinidad and Tobago has expressed the view that: -

"International students at the St. Augustine Campus become part of what is already one of the world's most cosmopolitan student bodies. We are committed to being an equal opportunity institution, with a wide cross-section of local, regional and international students, which adds so much more value to the UWI experience. Further, we are located in a culturally rich, diverse and exciting Trinidad and Tobago.[7]"

However, space may become an issue. The St. Augustine Campus saw an increase in full time enrollment of 136% between 2001/2002 and 2011/20013.[8] But foreign (non-CARICOM) students only make up about 4% of the total student population in the current academic year, 23 students orginating in EU countries, 17 of them from the United Kingdom.[9]

Fig 1: UWI Mona

During the academic year 2011/2012, just under 16,000 students were enrolled at the Mona, Jamaica campus of the UWI. Of the six faculties - Law, Medical Sciences, Pure and Applied Science, Gender and Development Studies, Social Sciences and Humanities and Education, only

[6] Miniature Digest of Education Statistics, Ministry of Education and Human Resource Development Barbados
[7] http://sta.uwi.edu/programmes/default.asp
[8] Annual Report 2011/2012 University of the West Indies, pg. 36
[9] The University of the West Indies, St. Augustine - Student Statistics 2012/13

the latter two experienced declines in enrollment in 2011/2012.[10] Interestingly, as Figure 2 showsthe enrollment of students from non-contributing countries has decreased dramatically in percentage in the latest two year period although the numbers remain small.

Fig 2: Student Enrollment at UWI Mona

	2009-10	2010-11	2011-12	Change 2009/10 to 2011/12	Change 2010/11 to 2011/12
Jamaica	13,772	13,834	14,429	5%	4%
Other Contributing Countries	1,314	1,203	1,189	-10%	-1%
Guyana and Turks & Caicos Islands	38	40	41	8%	3%
Non-Contributing Countries	274	288	214	-22%	-26%
Not Reported	83	27	24	-71%	-11%
Total	**15,481**	**15,392**	**15,897**	**3%**	**3%**

Source: University of the West Indies

The University of the West Indies also has an Open Campus, established in 2008. The Open Campus is based in Antigua and Barbuda but has 42 locations in 16 countries of the Eastern Caribbean. It takes a multifaceted approach delivering undergraduate and postgraduate courses using distance, blended, online and face-to-face learning modes.

Figure 3: Continuing Professional Education Programmes of U.W.I. Open Campus

The Open Campus offers 20 undergraduate degrees, 6 graduate programmes and 16 continuing professional education associate degrees, certificates or diplomas. As will be seen from the Figure 3, an interesting range of CPE is currently offered. A possible business development approach would be to seek to develop new programme offerings taking the example from those in climate change and tourism hospitality management for which content can be developed that is uniquely Caribbean.

[10] Principal's Report 2011/2012 UWI, Mona

The University of the West Indies has identified a number of relevant elements in its 2012-2017 Strategic Plan. Goals identified that are germane to the current study with the authors' comments in italics are: -

- Reduce the reliance of government financial assistance and increase the contribution from other sources - *this could involve development of new programmes intended for different audiences and increasing the numbers of foreign students*
- Ensure excellence of academic programmes - *a focus on quality service provision and education*
- Provide multiple,flexible paths for all constituencies to pursue tertiary education over their lifetime - *more services delivered through Mode 1*
- Create an enabling environment to support, foster and increase the output of high quality research and innovation with an emphasis on the Caribbean
- Enhance the global reach and impact of the UWI - c*an promote educational services trading opportunities*

The Strategic Plan points to opportunities for expansion in the non-Anglophone Caribbean and Latin America and suggests that collaboration can be enhanced with emerging markets (Brazil, India, China and South Africa are cited).

Accreditation is a critical process to promote services exporting in Educational Services. Accreditation certifies to prospective consumers the acceptability of the programme being offered for their home jurisdictions and allows them some certainty that the education they receive will allow them either to pursue additional studies or practise their chosen profession upon graduation. National accreditation is important but of greater value is regional or international accreditation.

Medical Schools in the Caribbean are accredited by the Caribbean Accreditation Authority for Education in Medicine and other Health Professions (CAAM-HP). CAAM-HP was established in 2003 to ensure the high quality of these programmes in the Caribbean. CAAM-HP is itself accredited by the World Federation for Medical Education[11]. Currently accredited programmes are: -

Figure 4: Accreditation Status

[11] http://http://www.caam-hp.org/documents/CAAM-HP%20Int'l%20Recognition.pdf

Medical Schools

#	School Name	Status	Last Updated
1.	All American Institute of Medical Sciences	*Initial Provisional Accreditation*	June 2012
2.	American University of Antigua (College of Medicine)	*Provisional Accreditation, 2012-2014*	June 2012
3.	British International University (BIU)	*Accreditation Withdrawn*	July 2009
4.	Global University Schools of Medicine and Public Health (GU-MED)	*Initial Provisional Accreditation*	August 2012
5.	Ross University School of Medicine	*Accredited with Conditions, 2009-2013*	June 2012
6.	Saint James School of Medicine, Anguilla	*Initial Accreditation as a Developing School*	June 2012
7.	St. George's University (SGU) School of Medicine	*Accredited with Conditions, 2011-2015*	June 2012
8.	The University of the West Indies (UWI) School of Medicine	*Accredited with Conditions, 2012-2017*	June 2012
9.	University of Guyana	*Accredited with Conditions, 2008-2012*	June 2012
10.	University of Science, Arts and Technology (USAT)	*Not Accredited*	June 2012
11.	Vanguard University School of Medicine	*Initial Provisional Accreditation*	June 2012

Veterinary Schools

#	School Name	Status	Last Updated
1.	The University of the West Indies (UWI) School of Veterinary Medicine	*Accredited with Conditions, 2009-2015*	June 2012

Dental Schools

#	School Name	Status	Last Updated
1.	The University of the West Indies School of Dentistry, Mona	*Accreditation Pending*	June 2012
2.	The University of the West Indies School of Dentistry, St Augustine	*Accredited with Conditions, 2010-2014*	June 2012

Source: CAAM-HP

The Windsor University School of Medicine in St. Kitts and Nevis has indicated to CAAM-HP its interest in seeking accreditation but the organization is still awaiting additional information. A site visit to the University of Guyana was to be accomplished in March 2013. Ross University School of Medicine in Dominica and Trinity School of Medicine in St. Vincent are among the schools due to receive site visits in 2013. Veterinary programmes offered by SGU and Ross University are accredited by US authorities.

It is notable that there has been relatively little European investment in the sector in the CARIFORUM. We see a number of American entities, privately owned and only one of which is publicly listed on the Stock Exchange, establishing in the CARICOM component of CARIFORUM to trade education services. On the contrary, most of the education services exporting of the European countries under review is conducted via Modes 1 (programmes) and 2 (students).

Overview of the Sector in the EU

European markets overall remain in precarious economic state, continuing to struggle with weak consumer demand, debt/deficit reduction policies and associated austerity plans, plus constrained access to finance, which is hampering major business growth. Whilst low interest rates continue to provide a lifeline to many (ailing) companies, overall earnings power is being eroded, and high unemployment in Southern Europe is increasingly problematic. This is forecast to continue for the medium term.

"*Europe's growth prospects, scarcely robust even in the pre-crisis era, will be subdued for the foreseeable future. Some countries are in prolonged recession, and suffering mass unemployment. The Eurozone's unity suffers from stark and persistent differences in financing conditions for creditor and debtor countries*"[12]

In some EU countries like the UK, the competitiveness dynamics are changing – in northern European markets, more flexible labour markets support a trend to part time working with people 'pricing themselves' into work. However, this means that overall productivity and in some cases overall competitiveness is falling.[13] This combination of falling prices/ rates and greater flexibility in some markets means that previous cost arbitrage with Caribbean markets is no longer so obvious. This will mean an increasing for foreign providers to compete on a broader range of factors, as part of the education value proposition and not just price alone as the major driver, though this will remain an important factor in the overall 'value-for-money' mix.

In addition, skill shortages, particularly in ICT, and specialist engineering fields, combined with employability concerns may provide an opportunity to provide education and training in certain niche fields, in particular when combined with quality provision, a lower cost of delivery in certain Caribbean markets and developments in new technology (on-line etc). Joint ventures and partnerships with European providers for delivery and branding will be an important route to market, and identifying partners in different parts of the value chain will be key.

The Global Competitive Index illustrates the relative competitiveness of the EU selected European markets in the study. It clearly shows a north south split.

Figure 5: Global Competitiveness Index 2012-13[14]

COUNTRY	Rank (140)	Score (1-7)
Netherlands	5	5.50
Germany	6	5.48
United Kingdom	8	5.45

[12] Financial Times, 8th May 2013
[13] http://www.ft.com/cms/s/0/3b5fde96-978d-11e2-97e0-00144feabdc0.html#axzz2U7plgH00
[14] World Economic Forum, 2012-13

France	21	5.11
Estonia	34	4.64
Spain	36	4.60
Italy	42	4.46
Malta	47	4.41

And, the Figure below provides an overview of relative size and economic power. Both Figures serve as a reminder.

Figure 6: GDP/Capita (USD)[15] and Population[16]

COUNTRY	GDP/capita (USD)	Population (m)
Netherlands	42,194	16.4
Germany	39,028	82.3
United Kingdom	36,941	60.7
France	35,548	65.03
Spain	30,557	44.7
Italy	30,136	58.8
Malta	27,022	0.4
Estonia	21,713	1.4

Education Overview (Tertiary)

Since the introduction of the Bologna[17] process a major expansion in higher education systems has taken place in Europe, accompanied by significant reforms in degree structures and quality assurance systems. However, the financial and economic crisis has affected higher education in different ways, with some countries investing more and others making radical cutbacks in their education spending. According to recent reports, the EU had around 4 000 higher education (undergraduate and postgraduate) institutions, with almost 20 million students in 2010.

The strategic framework for European cooperation in education and training that was adopted in May 2009 set a number of benchmarks, including one for tertiary education, namely that by 2020 the proportion of 30- to 34-year-olds with tertiary educational attainment should be at least 40%. Just over one third (34.6%) of the population aged 30 to 34 in the EU-27 had a

[15] http://en.wikipedia.org/wiki/List_of_countries_by_GDP_(PPP)_per_capita
[16] http://en.wikipedia.org/wiki/European_Union_Statistics#Area_and_population
[17] this put in motion a series of reforms to make European higher education more compatible, comparable, competitive and attractive for students

tertiary education in 2011, rising to almost four out of ten (38.5%) among women, and falling to just over three out of ten (30.8%) among men.

Illustrative of the differences, is the United Kingdom, where the proportion of 30-to 34-year-old men and women with tertiary educational attainment was already 40% or more in 2011; In contrast, less than 20% of men in this age range had a tertiary education in the Italy.

EU Member States reported more than 2 million tertiary students in 2010, namely Germany[18], the United Kingdom, France and Poland; tertiary student numbers in Italy and Spain were just below this level and together these six countries accounted for two thirds of all EU-27 students in tertiary education. Across the EU-27, just over one third (34.0 %) of the students in tertiary education were studying social sciences, business or law, with more female (3.9 million) than male (2.8 million) students in this field of education. The second largest number of students by field of education was in engineering, manufacturing and construction-related studies which accounted for 13.6 % of all students in tertiary education; three quarters of the students in this field were male.

The distribution of graduates by field of education can be seen in the Figure below, social sciences, business and law proving the most poular, followed by health and welfare.

Fig 7: Graduates from Tertiary Education by Field of Education[19]

	Total number of graduates from tertiary education (1 000)	of which, studying (%)							
		Human-ities & arts	Teaching & training	Social sciences, business & law	Science, math. & com-puting	Engin., manuf. & con-struction	Agricul. & vet-erinary	Health & welfare	Services
EU-27 (2)	*4 477*	*11.5*	*9.6*	*35.7*	*9.2*	*12.7*	*1.6*	*15.1*	*4.2*
Belgium	103	11.1	12.3	30.7	5.2	10.9	2.4	22.3	2.0
Bulgaria	61	6.8	5.5	51.6	4.7	15.2	1.9	6.7	7.6
Czech Republic	5	10.1	10.7	49.0	6.9	6.4	0.1	7.6	9.2
Denmark	103	7.5	15.1	34.1	9.2	14.2	3.4	8.9	4.5
Germany	54	13.2	7.6	32.7	8.3	11.1	1.6	22.6	2.9
Estonia	573	16.4	9.3	22.4	12.6	13.0	1.5	21.5	3.0
Ireland	11	12.8	7.7	37.6	9.8	10.7	1.9	11.0	8.5
Greece	59	12.0	8.5	30.8	11.2	12.0	1.3	15.6	5.1
Spain	65	13.2	8.8	30.3	12.1	15.4	4.6	12.6	3.1
France (3)	337	8.6	14.4	26.6	8.6	16.0	1.7	15.3	7.9
Italy	628	10.3	1.5	41.6	10.6	15.6	1.5	14.9	4.0
Cyprus	215	17.1	5.9	33.4	7.4	15.2	1.5	16.0	3.2
Latvia	27	7.2	8.3	54.3	5.0	9.3	0.9	9.3	5.7
Lithuania	45	7.2	11.5	45.8	5.0	16.2	1.9	9.6	2.9
Luxembourg	1	7.9	20.8	51.4	8.1	5.6	0.0	6.1	0.0
Hungary	70	12.7	11.6	40.4	6.9	8.9	2.4	9.0	9.3
Malta	3	18.9	10.5	38.3	9.4	6.9	0.5	12.6	2.9
Netherlands	132	9.0	13.4	37.6	6.1	7.9	1.5	18.7	5.3
Austria	58	8.7	12.1	34.1	9.8	19.3	1.8	10.9	3.6
Poland	625	8.0	16.3	42.6	6.8	8.9	1.7	8.9	6.2
Portugal	79	8.2	8.7	29.3	6.5	18.3	1.6	20.8	6.5
Romania	305	8.3	1.5	60.0	4.8	12.3	1.6	8.8	2.7
Slovenia	20	6.2	7.5	44.3	5.5	15.6	2.8	8.7	9.4
Slovakia	77	6.6	13.7	31.9	7.9	12.9	1.9	19.2	5.9
Finland	51	13.4	6.1	23.0	7.8	24.0	2.2	18.4	5.1
Sweden	61	6.5	15.5	25.2	7.7	19.2	1.1	25.9	3.2
United Kingdom	710	15.7	11.0	30.9	12.7	9.6	0.9	16.8	1.4
Iceland	4	10.3	20.4	37.0	6.6	9.1	0.5	15.1	1.2
Liechtenstein	0	0.0	0.0	81.0	0.0	18.5	0.0	0.5	0.0
Norway	38	8.6	17.6	29.4	7.1	8.9	0.8	22.5	4.9
Switzerland	85	8.1	9.9	37.2	7.5	12.3	1.9	15.5	7.1
Croatia	34	11.9	4.8	44.2	7.8	12.3	3.5	6.9	8.7
FYR of Macedonia	11	13.5	10.2	37.7	11.6	7.7	2.3	10.6	6.3
Turkey	573	8.2	11.8	44.8	7.0	13.3	4.5	5.9	4.6
Japan	967	15.2	7.1	26.7	3.1	17.4	2.5	12.6	8.9
United States	2 998	12.5	10.3	38.0	8.5	7.0	1.0	15.7	7.0

(1) Refer to the internet metadata file (http://epp.eurostat.ec.europa.eu/cache/ITY_SDDS/en/educ_esms.htm).
(2) Includes French data for 2009.
(3) 2009.
Source: Eurostat (online data code: educ_grad5)

[18] Note the data for this country excludes students enrolled at ISCED level 6
[19] http://epp.eurostat.ec.europa.eu/statistics_explained/index.php/Tertiary_education_statistics

According to the analysis, the number of graduates by field of education shows that 35.7% had studied social sciences, business and law; this share was higher than the equivalent share (34.0%) of tertiary education students still in the process of studying within this field, suggesting that less students had started this type of study in recent years, or that drop-out rates were higher in other fields. A similar situation was observed for health and welfare, which made up 15.1% of graduates from 13.6% of the tertiary student population, as well as the smaller field of services studies.

The reverse situation was observed for other fields of education most notably for engineering, manufacturing and construction-related studies. Within the EU-27, female graduates outnumbered male graduates by a ratio of approximately three to two; this ratio reached three to one for health and welfare fields of education. Male graduates outnumbered female graduates slightly in agriculture and veterinary fields, more so in science, mathematics and computing fields, and by close to three to one in engineering, manufacturing and construction-related fields.

Figure 8 below extracted from World Economic Forum (WEF) Competitiveness Index data compares the selected markets with selected CARIFORUM markets in terms of the higher education and training pillar of competitiveness. It shows the high (ranking) score of certain markets like UK and Spain for quality of management schools, and Estonia for internet access in schools. Spain and Italy perform relatively poorly in regards to the extent of staff training.

Interestingly, Caribbean markets, especially Barbados perform well, and indeed Barbados is ranked higher than many of the selected EU markets in a number of education related fields, and scores particularly highly in terms of quality of education system and quality of maths and science education. However, this contrasts with say the Dominican Republic which scores poorly in these areas.

Figure 8: Higher Education and Training Pillar – Selected EU and Cariforum Markets (WEF Competitiveness Index)[20]

EUROPE	Secondary Education Enrolment, gross %/ rank	Tertiary Education Enrolment, gross %/ rank	Quality of Education System	Quality of Math and Science Education	Quality of Management Schools	Internet Access in Schools	Availability of Research and Training Services	Extent of Staff Training
Netherlands	121.5/3	62.7/26	13	12	9	4	2	8
Germany	103.3/20	NA	20	29	32	45	4	13
UK	101.8/24	58.5/40	27	42	1	8	6	14
France	113.2/8	54.5/45	41	25	8	59	15	41
Estonia	103.6/19	62.7/27	49	19	48	2	39	46
Spain	124.7/2	73.2/18	81	97	4	47	28	105
Italy	100.4/31	66/23	87	65	35	86	33	123
Malta	100.9/27	35.3/71	16	15	28	18	45	50

[20] Data compared by K3 from from World Economic Forum, Global Competitive Index, 2012-13 - http://reports.weforum.org/global-competitiveness-report-2012-2013/

CARIFORUM								
Trinidad and Tobago	89.9/66	11.5/106	40	35	36	55	65	71
Grenada	NA	NA	NA	NA	NA	NA	NA	NA
Barbados	100.6/30	65.9/24	7	7	21	33	42	30
Dominican Republic	76.4/96	34/72	137	142	88	102	84	76
Jamaica	92.7/55	29/75	76	116	77	74	82	58
Saint Kitts and Nevis	NA	NA	NA	NA	NA	NA	NA	NA

Key Trends in EU Education

The following trends illustrate some of the opportunities and challenges facing the sector in the coming years.

- Global shortage of 'talent', despite high levels of unemployment (matching skills with employment opportunities) – ICT and engineering skills (STEM subjects[21]) in particular
- Employability remains a real problem In spite of the overall increase in the number of tertiary graduates a growing proportion appears to be overqualified for the type of employment they find. More than one in five tertiary graduates are over-qualified for their job, and this proportion has increased since 2000.[22]
- Transition from school to work, and employability, remains a major concern – youth unemployment rising – particularly in southern European markets of Spain and Italy, thus there is an urgent need to address vocational training issues
- According to the OECD's Education at a Glance, 2012[23] report, the financial return on tertiary education continues to grow. A European graduate can expect a net gain of USD 176 000 (OECD average: USD 162 000) over his working life and public long-term benefits from higher education through increased tax payments and other savings are almost three times the size of the public costs.[24]
- However, the cost of education is also rising – the withdrawal of up front state funding for students in EU markets, such as the UK, means that students are increasingly looking for value for money options (delivery and place), new finance mechanisms and work/study combinations.
- The strong growth in Massive Open On-Line Courses (MOOCs) is leading to new business model options, such as:-

[21] Science Technology, Engineering, Maths
[22] Key Data on Education in Europe 2012 report, Eurostat
[23] http://www.uis.unesco.org/Education/Documents/oecd-eag-2012-en.pdf
[24] http://europa.eu/rapid/press-release_IP-12-950_en.htm

- eDelivery, which is increasing, also due to need to work through education, and funding shortages, which is combined with improved low cost access to enabling technology such as Skype, webcasting, chat, ITunes UService[25]. Coursera[26], a for-profit venture that taps professors and lecturers from 62 universities (including Princeton, Stanford, the University of Michigan, and the University of Pennsylvania) boasts many courses with 50,000 to 100,000 users who pay nothing for access to the best professors in the world. Udacity's[27] introduction-to-computer-programming course has already been taken by a staggering 200,000 students worldwide

- Many top universities (Stanford, Open, MIT[28] etc) are now making course material free to international students to access universally. MITx now assigning certification.[29]

- There has been a tightening of visa regime for international students in markets like the UK, restricting access to certain students from international markets

- The increasing focus of European Higher Education Institutes on the 'internationalisation' of their education offer, rather than just attracting international students – e.g. collaborations, joint delivery and accreditation. The UK is leading the way in this field. This manifests itself in different ways and opens up new business opportunities, particularly in the trans-national education (TNE) field.

- The continued importance of standards in supporting global educational demand in specific fields, which are of relevance to the Caribbean - international standard bodies and interest groups e.g. the World Federation for Medical Education (WFME) and the Educational Commission for Foreign Medical Graduates (ECFMG – 2023 rule).[30] The role of the Caribbean Accreditation Authority for Education in Medicine and Other Health Professions (CAAM-HP) will remain important in ensuring quality provision.

  Notwithstanding these changes in the market place, "New relationships will increasingly emerge between countries with a demand for education and countries looking to supply it. The suppliers will need to focus on what these markets want and where they want it. That is likely to mean education and skills training delivered in their own country, supplemented by partnerships that support research and innovation."[31]

[25] http://www.apple.com/education/itunes-u/
[26] https://www.coursera.org/
[27] https://www.udacity.com/
[28] http://ocw.mit.edu/about/
[29] http://www.bbc.co.uk/news/education-17012968
[30] http://www.ama-assn.org/amednews/2012/08/13/prsa0813.htm and http://www.faimer.org/
[31] International Education, Global Growth and Prosperity, UK Industrial Strategy for Education, BIS, July 2013

Analysis of the Economic Partnership Agreement in relation to the Education Sector

The Education Sector remains sensitive to the European Union. This sensitivity is expressed in the commitments of the European Union in the Economic Partnership Agreement. The EU has made commitments on Education Services in Commercial Presence and in Services, including all Modes of Supply. However, the commitments only relate to **privately-funded** education. In respect of the EU all the Modes of Supply are of interest.

CARIFORUM has fewer commitments overall. And, it too restricts the scope of the commitments by excepting "non-profit, public and publicly-funded entitities". In CARIFORUM's case, of particular interest would be restrictions in Mode 3 (Commercial Presence) that may influence investment in enhancing the region's capacity to provide Education services.

EU Commitments on Commercial Presence

In respect of Commercial Presence in Primary, Secondary, Higher and Adult Education, there is an EC-wide indication that private operation "in the education network is subject to concession. Sixteen (16) EU Members have listed limitations. Five (5) of these are Unbound and an additional four (4) are Unbound for specific sub-sectors. Other Education is more restricted with twenty five (25) States being unbound and the remaining two (2) listing specific restrictions.

In addition, horizontal reservations are in place that may affect establishment. In all sub-categories of education services in the EU-27, there are limitations on acquisition of land by foreigners and subsidiaries of third country entities may not receive the same treatment as subsidiaries of EU enterprises. In Estonia, at least half of the management board must EU citizens. In Spain, investment by foreign government and foreign public entities must receive the prior authorisation of the government.

Country	Primary, Secondary, Higher, Adult Education	Other Education
Estonia	No limitation	Unbound
France	No limitation	Unbound
Germany	No limitation	Unbound
Italy	ENT for opening private universities authorised to confer degrees. This involves reference to Parliament and the criteria are population and the density of existing establishments.	Unbound
Malta	Unbound	Unbound
Netherlands	No limitation	Unbound
Spain	ENT for opening private universities authorised to confer degrees. This involves reference to Parliament and the criteria are population and the density of existing establishments.	Unbound
UK	No limitation	Unbound

How restrictive is this in practice? The answer to this lies in the likely Mode of provision of CARIFORUM and the expected services activities of most interest. As to the mode, it is understood that the primary interest of export interest to CARIFORUM is Mode 2. Similarly, it is generally accepted to be the least likely possibility that there would be significant interest on the part of CARIFORUM service providers in establishing commercial presence. Higher Education appears to be the activity with the highest level of interest. The Figure below summarises the situation with respect to the EU countries under review by this paper.

Figure 9: EU Commitments in Modes 3

All of the countries under review for this paper are Unbound with respect to Other Education. Specific limitations are listed by Italy and Spain and Malta is Unbound for Primary, Secondary, Higher and Adult Education. Commercial presence without specific limitation is possible in EU Members with strong linkages to the Caribbean such as France, the Netherlands and the United Kingdom.

The Caribbean has a strong interest in Student Mobility and as such the high level of openness of the EPA schedules of all but one of the countries under consideration by this study is noteworthy. Only Malta is restrictive with respect to Mode 2 while the others are open for Primary through Adult Education. All are Unbound for Other Education. In principle, therefore, exporting services through Mode 2 to these countries is supported by the EPA commitments.

Figure 10: EU Commitments in Modes 1 and 2

Country	Mode 1	Mode 2
Estonia	Primary: No limitation	Primary: No limitation
	Secondary: No limitation	Secondary: No limitation
	Higher: No limitation	Higher: No limitation
	Adult: No limitation	Adult: No limitation
	Other: Unbound	Other: Unbound
France	Primary: Unbound	Primary: No limitation
	Secondary: Unbound	Secondary: No Limitation
	Higher: Unbound	Higher: No limitation
	Adult: No limitation	Adult: No limitation
	Other: Unbound	Other: Unbound
Germany	Primary: No limitation	Primary: No limitation
	Secondary: No limitation	Secondary: No limitation
	Higher: No limitation	Higher: No limitation
	Adult: No limitation	Adult: No limitation
	Other: Unbound	Other: Unbound
Italy	Primary: Unbound	Primary: No limitation
	Secondary: Unbound	Secondary: No limitation
	Higher: Unbound	Higher: No limitation
	Adult: No limitation	Adult: No limitation
	Other: Unbound	Other: Unbound
Malta	Primary: Unbound	Primary: Unbound
	Secondary: Unbound	Secondary: Unbound
	Higher: Unbound	Higher: Unbound
	Adult: Unbound	Adult: Unbound
	Other: Unbound	Other: Unbound
Netherlands	Primary: No limitation	Primary: No limitation
	Secondary: No limitation	Secondary: No Limitation
	Higher: No limitation	Higher: No limitation
	Adult: No limitation	Adult: No limitation
	Other: Unbound	Other: Unbound
Spain	Primary: No limitation	Primary: No limitation
	Secondary: No limitation	Secondary: No Limitation
	Higher: No limitation	Higher: No limitation

	Adult: No limitation	Adult: No limitation
	Other: Unbound	Other: Unbound
UK	Primary: No limitation	Primary: No limitation
	Secondary: No limitation	Secondary: No limitation
	Higher: No limitation	Higher: No limitation
	Adult: No limitation	Adult: No limitation
	Other: Unbound	Other: Unbound

In the Economic Partnership Agreement, provision is made for service providers through certain categories of persons. Graduate trainees are employees of a company who must have been employed for at least one (1)year and are temporarily transferred "for career development purposes or to obtain training in business techniques or methods".[32]

Key personnel are natural persons employed by a company of either Party (other than a non-profit) who "are responsible for the setting-up or the proper control, administration and operation of a commercial presence"[33]. Key personnel includes business visitors and intra-corporate transferees[34]. As far as key personnel are concerned, horizontal limitations in France require approval for a non-resident managing director of an industrial, commercial or artisanal activity and EU Directives on Mutual Recognition do not apply to third-country nationals.

France and Italy have nationality requirements in Primary, Secondary and Tertiary Education. France indicates that it is possible for third country nationals to be authorised to establish and direct an education institution and to teach. Italy's nationality condition relates to service providers authorised to issue State-recognized diplomas. No specific reservations are applied in the other EU countries of interest to this study. Commitments are made by the EU only in respect of Higher Education Services for Contractual Service Suppliers[35] and Independent

[32] Economic Partnership Agreement - Article 80
[33] Economic Partnership Agreement - Article 80
[34] Business visitors are "natural persons working in a senior position who are responsible for setting up a commercial presence. They do not engage in direct transactions with the general public and do not receive remuneration from a source located within the host EC Party or Signatory CARIFORUM State respectively." Intra-corporate transferees are "natural persons of the EC Party or of the Signatory CARIFORUM States who have been employed by a juridical person or have been partners in it for at least one year and who are temporarily transferred to a commercial presence in the territory of the other Party. The natural person concerned must belong to one of the following categories:
(1) Managers:
Persons working in a senior position within a juridical person, who primarily direct the management of the commercial presence, receiving general supervision or direction principally from the board of directors or stockholders of the business or their equivalent, including:
(i) directing the commercial presence or a department or sub-division thereof;
(ii) supervising and controlling the work of other supervisory, professional or managerial employees;
(iii) having the authority personally to recruit and dismiss or recommend recruiting, dismissing or other personnel actions.
(2) Specialists:
Persons working within a juridical person who possess uncommon knowledge essential to the commercial presence's production, research equipment, techniques or management. In assessing such knowledge, account will be taken not only of knowledge specific to the commercial presence, but also of whether the person has a high level of qualification referring to a type of work or trade requiring specific technical knowledge, including membership of an accredited profession."

[35] "Contractual services suppliers" means natural persons of the EC Party or of the Signatory CARIFORUM States employed by a juridical person of that EC Party or Signatory CARIFORUM State which has no commercial presence in the territory of the other Party and which has concluded a bona fide contract (other than through an agency as defined by CPC 872) to supply services with a final consumer in the latter Party requiring the presence on a temporary basis of its employees in that Party in order to fulfil the contract to provide services.

Professionals[36]. This sector is the most likely to be in a position to benefit. However, most of the countries of interest are Unbound. France's commitment applies only to university professors. They must have an employment contract and economic needs tests apply in most circumstances (unless they are designated directly by the Minister in charge of higher education). The market opening for these categories of educational service providers provided by the EU to CARIFORUM is therefore low and not commercially meaningful.

CARIFORUM Commitments in Educational Services

The commitments of CARIFORUM in Education Services are provided in Appendix 5. Belize and Jamaica have horizontal limitations restricting access to government benefits, scholarships, government loans and grants are limited to residents and nationals. In addition, five Member States (Antigua and Barbuda, Grenada, Guyana, St. Lucia, St. Vincent and the Grenadines and Suriname) include similar specific limitations with respect to national treatment for commercial presence in higher and adult education.

Not all CARIFORUM states made specific commitments in Education Services. The Member State commitments are summarized below.

Figure 11: CARIFORUM EU Commitments in Educational Services

CARIFORUM Member	Sub-Sector Commitments
Guyana	All Sub-sectors
Dominica, Jamaica, Suriname	Primary, Secondary, Higher, Adult
St. Lucia	Secondary, Higher, Adult, Other
Trinidad and Tobago	Higher, Adult, Other
St. Vincent and the Grenadines	Higher, Adult
Grenada and the Dominican Republic	Higher

If we look at the Mode 3 commitments, it is clear that CARIFORUM has been hesitant to offer liberalization. Suriname is unbound in all the sub-sectors. Even in the area of higher education, where there is some existing international investment in the region, only Jamaica and Antigua and Barbuda have indicated that they apply no limitations. Grenada (St. Georges' University) would be open from January 1, 2018 but Dominica (Ross University among others) is Unbound. It therefore cannot be said that the region has used the EPA to show its willingness to receive new international investment in Educational Services. On the face of it, the region has not legally prepared itself to take advantage of the internationalisation trend mentioned in the previous section. It will be up to the individual institutions to seek collaborations of various types with institutions based in Europe.

[36] "Independent professionals" means natural persons of the EC Party or of the Signatory CARIFORUM States engaged in the supply of a service and established as self-employed in the territory of that EC Party or Signatory CARIFORUM State who have no commercial presence in the territory of the other Party and who have concluded a bona fide contract (other than through an agency as defined by CPC 872) to supply services with a final consumer in the latter Party requiring their presence on a temporary basis in that Party in order to fulfil the contract to provide services.

Individual State and Sector Analysis

Antigua and Barbuda

The American University of Antigua (AUA) College of Medicine offers students two years of study in the Caribbean (Basic Science) and two yeas of clinical rotations (Clinical Science) in the United States. Nine (9) students formed the first AUA class in 2004. In 2010, the AUA commenced a programme that mirrors that of the United States. It is recognized by the Medical Board of California, approved by the New York State Education Department and is provisionally accredited by CAAM-HP.

Figure 12: Campus of AUA

The Campus occupies more than 17 acres and has total enrollment of 1,950 from 24 nations. Total tuition and fees during the Basic Sciences Component are between US $16,180 and US $16,345 and during the Clinical Sciences component, US $17,100 to US $17,450.

The other medical school in Antigua began instruction in 1983. The University of Health Sciences Antigua School of Medicine offers a 4 year degree that inter alia “is one of the Professional and Linguistic Assessments Board (PLAB) in the U.K. In making this claim this University is one of the few in the region to mention a link to European accreditation processes.

It also offers a degree targeted at students wishing to practice in the UK, a BSc leading to M.D. Program with London Metropolitan University. At a cost of US $10,000 per year, students registered at London Metropolitan University’s Biomedical Sciences can complete the requirement for the Bachelor of Science in Biomedical Sciences and Doctor of Medicine degrees.

The University of Health Sciences Antigua School of Medicine also offers a 3 year programme leading to a B.Sc in Nursing, one of the few offshore medical schools to do so in the Caribbean. The entire course of study is completed on Antigua and graduates can then take the Caribbean Regional Examination or the NCLEX Qualification in the United States.

The Bahamas

The Bahamas is host to the College of the Bahamas and the Eugene Dupuch Law School. The Eugene Dupuch Law school prepares students to practise in the Caribbean and therefore, not surprisingly, its exports have primarily been within the Caribbean. It admits students with first degrees in Law and provides the Certificate in Legal Education.

A wider choice of study exists in The College of the Bahamas. It has eight academic units:

- School of Business
- Culinary and Hospitality Management Institute
- School of Communication and Creative Arts
- School of English Studies
- School of Nursing and Allied Health Professions
- School of Sciences and Technology
- School of Education
- School of Social Sciences.

An area of specialized instruction with a history of receiving students from overseas is the Bahamas Tourism Training Centre which host the Culinary and Hospitality Management Institute and the Hotel Management Programme of the University of the West Indies (Centre for Hotel and Tourism Management, areas in which degrees are offered). Established in 1978, the Centre has produced thousands of professionals in the tourism sector in the Caribbean.

Nova Southeastern University of Florida also has a campus in The Bahamas as does Ross University. A campus of Ross University has been opened on Freeport, Grand Bahama. It offers an opportunity for students in the medical school in Dominica to spend their third and fourth semesters in the Bahamas. The Freeport campus of Ross University is intended to cater to the expansion of the Ross University system to meet the growing demand for medical education. It also seeks to draw on the proximity to the United States of The Bahamas.

Barbados

Barbados. long host to one of the campuses of the UWI, is home to an offshore medical educational institution as well. The American University of Barbados School of Medicine began instruction in 2011. It offers a 4 year Medical Doctor Degree and a 5½ year M.D. Degree including Pre-Med.apart from local licensing in Barbados it cites approval by the Medical Council of Canada. Due to its recent establishment it is currently recruiting both administrative and teaching staff. Its fees vary from US $5000 to US $7900 per semester.

Barbados has in place an accrediting institution. The Barbados Accreditation Council was established in 2005. It is responsible for the registration and re-registration of institutions offering secondary or tertiary education and training, the registration and re-registration of

programmes of studies in the country and certifying Certificates of Recognition of CARICOM Skills Qualification granted by other CARICOM Member States.

Figure 13: Colleges or Universities in Barbados

Colleges or Universities in Barbados
University of the West Indies
American University of Barbados School of Medicine
Barbados Community College
Erdiston College
Samuel Jackman Prescod Polytechnic

Source; Ministry of Education, Barbados

Belize

The University of Belize is the largest tertiary education institution in the country. It has five (5) campuses and approximately 3,200 undergraduates. It offers 49 programmes in Education, Management and Social Sciences, Science and Technology and Nursing, Allied Health and Social Work.

Figure 14: Colleges or Universities in Belize

Colleges or Universities in Belize
University of the West Indies School of Continuing Studies
University of Belize
Wesley Junior College
San Pedro Junior College
Sacred Heart Junior College
Corozal Junior College
Muffles Junior College
Stann Creek Ecumenical Junior College
Independence Junior College
Centro Escolar Mexico Junior College
Galen University

Source: Ministry of Education, Youth and Sports, Belize

The only private tertiary institution is Galen University with a student population of approximately 450. It offers its own degrees as well as accredited degrees from the University of Indianapolis and the University of North Carolina at Wilmington. It offers undergraduate degrees in Anthropology, Archaeology, Mass Communication, Accounting, Banking and Finance, Economics, International Business, Marketing, Management and Administration, Computer Science, Mathematics and Environmental Science. It offers six (6) graduate programmes: -

- Master of Business Administration
- Master of Education in Secondary Education
- Master of Environmental Science
- Master of Sustainable Economic Development
- Master of Science In Accountancy

- PhD in Sustainable Economic Development

Dominica

Ross University School of Medicine was established in Dominica in 1978. It benefits from an indefinite exemption from local income taxes by agreement with the Government of the Commonwealth of Dominica. Its fees are US $17,675 per semester. It recently (June 2013) graduated its 10,000th student. According to Ross University, the Class of 2013 comprised approximately 1,100 graduates from "44 U.S. states, seven Canadian provinces, and dozens of countries of origin."[37]

The medical school is accredited by the Caribbean Accreditation Authority for Education in Medicine and Other Health Professions and the Dominica Medical Board. According to the DeVry website, "for the 2012-13 academic year, more than 740 RUSM graduates obtained residency appointments in the U.S. and Canada, a record number for the school. RUSM students also achieved a 96 percent first-time pass rate on Step 1 of the United States Medical Licensing Examination, based on institutional reporting for the calendar year 2012."[38]

Dominica is also home to All Saints University, an institution established in 2006. It also has a campus in St. Vincent and the Grenadines and currently cites an enrollment of 700 first degree students and 100 graduate students. It cites recognition by ECFMG/FAIMER (Foundation for Advancement of International Medical Education and Research) in the United States, the Medical Council of Canada, and the Government of the Commonwealth of Dominica.

Dominican Republic

Figure 15: Colleges or Universities in the Dominican Republic

Colleges or Universities in Dominican Republic	
Barna Business School	University of the Third Age
Loyola Polytechnic Institute	Caribbean University
Higher Institute of Agriculture	Dominican University Organization and Method
Superior Technical Institute San Valero Oscus	University Dominican - American
Santo Domingo Institute of Technology	Eugenio Maria de Hostos University
Eastern Cibao Technological Institute	Felix Adam Experimental University
Pontificia Universidad Catolica Madre y Maestra	Universidad Federico Henriquez y Carvajal
Open University for Adults	Universidad Iberoamericana
Dominican Adventist University	American University
Universidad APEC	National Evangelical University
Autonomous University of Santo Domingo	Universidad Nacional Pedro Henríquez Ureña
Catholic University of Santo Domingo	National Technological University
Catholic University Nordestana	Dominican Dental University
Jenzabar University	Industrial Psychology Dominican University
East Central University	Technological University of Santiago
Dominican Central University of Professional Studies	

[37] http://investors.devryinc.com/Investor-Relations/Press-Releases/Press-Releases/Press-Release-Details/2013/10000th-Graduate-Receives-Medical-Doctor-Degree-at-Ross-University-School-of-Medicine-Commencement-Ceremony/default.aspx
[38] Ibid

Source: Secretaria de Estado de Educación Superior, Ciencia y Technología

In the Dominican Republic, La Asociación Dominicana para el Autoestudio y la Acreditación is the accreditation body for higher education. ADAAC defines criteria, indicators and quality standards as is normal with institutions of this type. Tertiary level institutions in the Dominican Republic are listed below.

As the largest CARIFORUM Member, is not surprisingly home of the largest number of tertiary institutions. Its universities offer a range of degrees, mostly to Dominican nationals. According to the Central Bank in 2012 the country is home to about 1,500 foreign students who contribute about US $9.6 million to the economy of the Dominican Republic. The main export market is Haiti (73.5%) followed by the United States (20.1%)[39]. European students accounted for 1.5%. The dominant course of study was Medicine (47.1% in 2011). See the Figure below.

Figure 16: Foreign students in the Dominican Republic

Universidad	Total Estudiante Extranjero por Universidad Nh	Número Estudiantes Extranjeros de la Muestra nh	Muestra Efectiva	Nivel Respuesta
Total	**8,859**	**1,500**	**1,500**	**100%**
UTESA-SANTIAGO	2,282	357	357	100%
UTESA-STO. DGO.	1,500	256	256	100%
PUCMM-RSTI	1,288	220	220	100%
UCE	859	148	148	100%
UNIBE	810	140	140	100%
PUCMM-RSTA	358	62	62	100%
UCSD	309	53	53	100%
O&M	231	40	40	100%
UNAPEC	196	34	34	100%
UASD	171	30	30	100%
UNEV	150	15	15	100%
UNPHU	103	18	18	100%
ISA-SANTIAGO	90	16	16	100%
INTEC	88	16	16	100%
UCATEBA	85	14	14	100%
UNICDA	66	12	12	100%
UNAD	63	12	12	100%
UNICARIBE	59	12	12	100%
UFHEC	52	10	10	100%
UAPA	39	10	10	100%
INCE	22	7	7	100%
UODOM	15	6	6	100%
UAFAM	12	6	6	100%
UTE	11	6	6	100%

Source: Central Bank of the Dominican Republic

The Dominican Republic has set out a number of goals in its national development plan for tertiary education. It intends to increase the number of students in tertiary education to 659,000 of 50% of the age group 18-24 by 2018. Some of the objectives of the Plan[40] are: -

- Enhance equity and increase the access, stay and graduates in tertiary education

[39] Encuesta sobre Gastos de Estudiantes Extranjero in la República Dominicana, pg. 12.
[40] Plan Decenal de Educaciion Superior, Dominican Republic

- improve to quality of teaching and learning
- professionalizing and promoting the professional development of staff in higher education
- modernizing higher education and promoting internationalization and innovation
- significantly improving financing of higher education, science and technology.

Figure 17: Dominican Republic Education Statistics

Tertiary Education Statistics 2010	
National Scholarships	7,660
International Scholarship	3,020
Graduates	424,600

Source: Encuesta sobre Gastos de Estudiantes Extranjero in la República Dominicana

Grenada

The dominant vehicle for the export of education services from Grenada is the St. George's University. Founded in 1976, the University claims that "In the past three years, St. George's University has placed more doctors into first-year US residency positions than any other medical school in the world."[41]St. George's offers the following programmes: -

Medical Program
(Four-Year Doctor of Medicine)
Premedical Program
Public Health – Medicine
Research – Medicine
Nursing
Veterinary Medical Program

(Four-Year Doctor of Veterinary Medicine)
Preveterinary Medical Program
Public Health – Veterinary Medicine
Research – Veterinary Medicine
Business – Graduate

Undergraduate Degrees
- Business
- Information Technology

[41] http://http://www.sgu.edu/

- Liberal Studies
- Biology
- Management Information Systems

The majority of the students in the current enrollment of 6,424 are from the United States. According to the University web-site the current geographical breakdown is as follows: -

United States	64%
Canada	12%
Grenada	9%
Trinidad and Tobago	5%
Botswana	1%
India	1%
United Kingdom	1%
Nigeria	1%
South Korea	1%

Other EU consumers are from Italy, Germany, Czech Republic, Hungary, Lithuania, and Portugal. And, graduates have been registered and licensed in the UK, Germany and Greece. It is a member of the Association of Caribbean Tertiary Institutions and its programmes have been approved or accredited by

Guyana

Guyana has four medical schools: -

- University of Guyana Faculty of Health Sciences
- American International School of Medicine
- GreenHeart Medical University School of Medicine
- Texila American University College of Medicine

GreenHeart Medical University is the only one not registered with the National Accreditation Council of Guyana.[42]Other true tertiary level institutions are the University of Guyana and the University of Southern Caribbean.

Figure 18: Registered Institutions in Guyana

[42] http://www.nac.gov.gy/ListOfRegisteredInstitutions.aspx

Registered institutions in Guyana	
Carnegie School of Home Economics	
Charles Roza School of Nursing	Cacique Incorporated
Cyril Potter College of Education	Davis Memorial Hospital
Essequibo Technical Institute	Guyana Association for Alternative Medicine
Georgetown school of Nursing	Guyana Islamic Institute
Government Technical Institute	Guyana Power and Light –Training Department
Guyana School of Agriculture	Guyana Training College for International Skills
Kuru Kuru Cooperative College	Institute of Private Enterprise Development
Linden technical Institute	Nation's University
New Amsterdam Technical Institute	New Guyana School
University of Guyana	St Joseph Mercy Hospital
Upper Corentyne Industrial Centre	Texila American University
Accountancy Training Centre	The Business School
American International School of Medicine	University of Southern Caribbean
Art Williams & Harry Wendt Aeronautical Engineering School	

Source: Ministry of Education, Guyana

Jamaica

Offshore medical education is one of six sectors identified for concentration in the Jamaica Services Sector Strategy Draft Report. Other sectors identified are:

- Medical Tourism
- Health and Wellness
- Information and Communications Technology
- Management Consulting
- Creative Industries - Music

With respect to Offshore medical education, the report identifies potential strengths of Jamaica as "a highly trained cadre of lecturers and technicians; professional wage rates that are less than half of those in the OME-dominant OECS region; and potential sector linkages and synergies because of Jamaica's substantial on-shore tourism, large Diaspora, and proximity to North American markets.[43]" Challenges identified by this study are: -

1. To reduce the national crime rate and ensure that offshore medical schools are situated in physical locations designed to minimise the exposure of medical students and offshore school personnel to crime.
2. To adopt clear regulatory guidelines, including operational health standards specifics to medical labs and treatment of experimental tissue (e.g. cadavers) and any toxic or contaminant material.
3. To build awareness of the sector's high value added potential for Jamaica amongst the Jamaican medical community and to promote the benefits and advantages to the community and to other sectors of the economy (e.g. tourism, consumption trade, real estate etc.,) of establishing offshore medical schools in Jamaica

[43] Michael V. Julien, Three-Year Service Sector Strategies and Expansion Plans, pg. 15

4. To develop and secure government commitment to a comprehensive investment incentive framework that is highly competitive with those of other regional offshore destinations and that is WTO/SCM-compatible.
5. To design and execute a highly targeted investment promotion campaign aimed at established investors in the sector in the Caribbean, Central America and South America and at FPE institutions in the US, Canada and the UK.[44]

At the moment, there is only one overseas medical school in Jamaica. The All American Institute of Medical Sciences was established only in 2011. It has been granted provisional accreditation by CAAM-HP. It offers Pre Med, MD, Dual and Bachelors/MD/MSc programme. No information is available about the enrollment levels of this institution.
Accreditation of tertiary institutions is the responsibility of the University Council of Jamaica. It assesses "scope, level, appropriateness and educational value of institutional programmes and experiences; qualifications and competence of staff; rigour and strategy for assessing student performance; adequacy and suitability of physical facilities with regard to student enrollment; adequacy of resources, library, computers, laboratories, to support the programmes; and other operational factors."[45]It also assists accredited institutions to improve programmes.

Figure 19: Registered Tertiary Institutions in Jamaica

Registered Tertiary Institutions in Jamaica	
University of the West Indies	Mel Nathan College
B & B Institute of Business	The Mico University college
Bethel Bible College	Midland Bible Institute
Bethlehem Moravian College	Missionaries of the Poor: Institute of Learning
Brown's Town Community College	Moneague College
Caribbean Graduate School of Theology	Montego Bay Community College
Caribbean Maritime Institute	NCB Corporate Learning Campus
Caribbean Wesleyan College	Northern Caribbean University
Catholic College of Mandeville	Paralegal Training Institute
Church Teachers' College	Portmore Community College
College for Leadership & Theological Development	Regent College of the Caribbean
College of Agriculture, Science and Education	Royale College of Arts and Social Sciences
College of Insurance and Professional Studies	St. Joseph's Teachers' College
Crowne Professional College	St. Michael's Theological College
Edna Manley College of the Visual & Performing Arts	Sam Sharpe Teachers' College
Excelsior Community College	Shortwood Teachers' College
G.C. Foster College of Physical Education & Sport	Suriname College of Hospitality and Tourism
Jamaica Constabulary Staff College	United Theological College of the West Indies
Jamaica Theological Seminary	University College of the Caribbean
Justice Training Institute	University of Technology, Jamaica
Knox Community College	Vector Technology Institute
Management Institute for National Development	Vocaitonal Training Development Institute
Media Technology Institute	Western Hospitality Institute.

Source: The University Council of Jamaica

[44] Ibid, pg. 52-3
[45] http://www.ucj.org.jm

St. Kitts and Nevis

St. Kitts and Nevis is the home to several international education institutions. Most of them are located in St. Kitts and one (1) in Nevis. It has recently established the St. Kitts and Nevis Accreditation Board. Seven schools are currently accredited, the largest of which are Ross University School of Veterinary Medicine and Windsor University School of Medicine.

Figure 20: Accredited Tertiary Institutions in St. Kitts and Nevis

Accredited Institutions in St. Kitts and Nevis
International University of Graduate Studies
International University of Nursing
International University of the Health Sciences School of Medicine
Medical University of the Americas
Ross University School of Veterinary Medicine
University of Medicine and Health Sciences
Windsor University School of Medicine

Source: St. Kitts and Nevis Accreditation Board

Ross University School of Veterinary Medicine (RUSVM) is located in St. Kitts and Nevis and is a sister institution of Ross University School of Medicine in Dominica, both of which were acquired by DeVry Inc in 2003. DeVry Inc thus operates schools in Dominica, St. Kitts and Nevis and the Bahamas. It operates in St. Kitts and Nevis under a tax holiday until 2037. In June 2013, more than 280 students received their degrees as Doctors of Veterinary Medicine[46]. True to the US focus of the university, the graduation ceremony was held in New York City. It focuses on the United States and Canada and holds several recruitment seminars in these countries every year.

RUSVM is affiliated with 28 universities in the United States where students complete their year of clinical study. Since its establishment RUSVM has graduated 3000 students. Tuition fees are US $16,800 per semester. It is accredited by the American Veterinary Medical Association Council on Education although in 2013, in was found to be non-compliant with the Research component of the accreditation and placed on Limited Accreditation Status for up to two years.[47] Pass rates for graduates of RUSVM in the last 5 years have averaged more than 92%.

Windsor University School of Medicine has been established in St. Kitts since 2000. It currently runs the following programmes: -

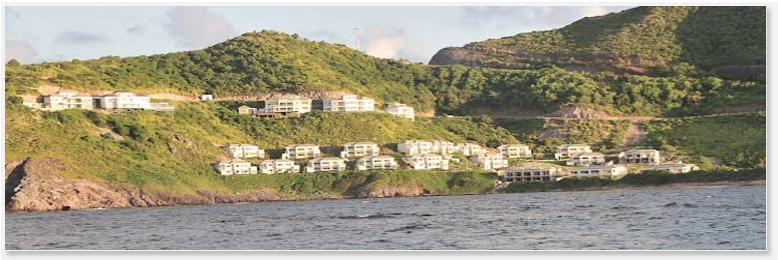
- B.Sc (BioTechnology)
- B.Sc (Cancer Biology)
- M.Sc (BioTechnology)
- M.Sc (Cancer Biology)
- Ph.d (Cancer Biology)

[46] http://www.rossu.edu/news/Ross-University-School-of-Veterinary-Medicine-Recognizes-Class-of-2013.cfm
[47] http://www.rossu.edu/veterinary-school/Ross-University-School-of-Veterinary-Medicine-Accreditation.cfm

- HCP Program
- Premed & MD Program

It identifies registration in 6 Canadian provisions and a number of states of the United States and recognition by the Medical Council and Board of the Government of St. Kitts and Nevis among its attributes. Its current enrollment is approximately 1,500. Its fee structure is considerably lower that its competitor in the regions, US $4990 per semester.

Figure 21: Windsor University School of Medicine



St. Lucia

The Sir Arthur Lewis Community College (SALCC) is the main tertiary level institution in St. Lucia. Established in 1985, it provides instruction in the several areas in the following Divisions or Departments: -

- Arts and General Studies
- Technical Education and Management Studies
- Teacher Education
- UWI
- Health Sciences
- Agriculture
- Home Economics
- Continuing Education

In 2011/2012 the total enrolment was 3,154 of which approximately one-third comprised students of the Division of Continuing Education[48]. SALCC offers Certificates, Diplomas and Associate Degrees and administers external "A" Level Exams and UWI Programmes.

St. Vincent and the Grenadines

Presently, more than 400 students are pursuing medical studies in St. Vincent and the Grenadines. Trinity School of Medicine has been offering Doctor of Medicine degrees in St. Vincent and the Grenadines since 2008. Its web site touts among its advantages small class sizes. in the current class 75% of the students are from the United States, 20% from Canada and 5% from the Caribbean with an

[48] Ministry of Education, HRD and Labour: Education Statistical Digest, pg. 121

average age of 24.[49]92% of its graduates in 2012 were placed in residency programmes, primarily in the United States.

A new medical school is expected to begin operation in 2014. St. James Medical School hopes to have sixty (60) students in its first class and is seeking to reach a cohort of 200 within three (3) years.

Trinidad and Tobago

In Trinidad and Tobago, there are five (5) universities and colleges and approximately 70 private institutions offering tertiary education degrees. The Trinidad and Tobago Coalition of Services Industries has indicated that priority opportunity areas for education services are English Language training, Technical and Vocational Education (including Energy Services Training) and Tertiary Education given given high costs in UK and visa issues in USA.[50] They also see an opportunity for mixing types of services, for example, the English language training with Energy Services training.

The Draft National Strategy for Export of Education Services includes the overall objective to increase the number of foreign students studying in Trinidad to 7500 students contributing an additional US $62.5 million to services exports and the economy as a whole after 3 years and then grow at 20% per annum thereafter. Estimated receipts are US$ 37.5 million from Higher Education, US$ 12.5 million from English Language training and the same amount in terms of Technical and Vocational Education.[51]These figures are based on estimates of Us$ 5000 per student for English Language Training and Technical and Vocational Education.

It is currently estimated that currently trade in education services is low. The Draft Strategy estimates the cohort of foreign students at educational institutions in Trinidad and Tobago at only 5%.[52]

Figure 22: Accredited Institutions in Trinidad and Tobago

Accredited Institutions in Trinidad and Tobago
University of the West Indies
University of Trinidad and Tobago
College of Science, Technology, Applied Arts of Trinidad and Tobago
Arthur Lok Jack Graduate School of Business - UWI
University of the Southern Caribbean
Cipriani College of Labour and Co-operative Studies

Source: Accreditation Council of Trinidad and Tobago

As far as tertiary education is concerned the Draft Strategy identifies markets in Africa, not Europe.[53] The target countries in Africa are identified as Nigeria, Zimbabwe, Cameroon and

[49] http://blog.trinityschoolofmedicine.org/blog-compare_Caribbean_-Medical_Schools/bid/97189/Who-are-the-Newest-Medical-Students-of-Trinity-School-of-Medicine
[51] Trinidad and Tobago Coalition of Services Industries: Annual Report 2012, pg. 18
[51] Trinidad and Tobago Coalition of Services Industries: Annual Report 2012, pg. 18
[52] Draft National Strategy for Export of Energy Services (August 2012) pg. 1
[53] Ibid, pg. 16

Kenya. For English language training, the report recommends concentration on near markets in Latin America, in particular Brazil, and China.[54]For Technical and Vocational Education, the target markets are in the Caribbean and specific markets such as the oil and gas sector.[55]

[54] Ibid, pg. 20
[55] Ibid, pg. 23

Statistical Review of Trade in Educational Services[56]

Existing data of the international trade in educational and ICT services was scarce and difficult to evaluate, therefore hindering efforts to get a reliable picture of the size of trade in educational and ICT services between the CARIFORUM region and select EU Member states. Data was obtained from the Eurostat database on International Trade in Services and from the CARIFORUM region's national statistical offices. In addition, data was obtained from the Eurostat Indicators for Education Systems database on foreign students in tertiary education to give an overview of the approximate scale of trade in educational services.

Data on the trade in educational services was collected according to the OECD/Eurostat classification. In this classification, trade in educational services is counted under the following headings:

1. 242 Personal travel, Education-related expenditure;

2. 895 Education services.

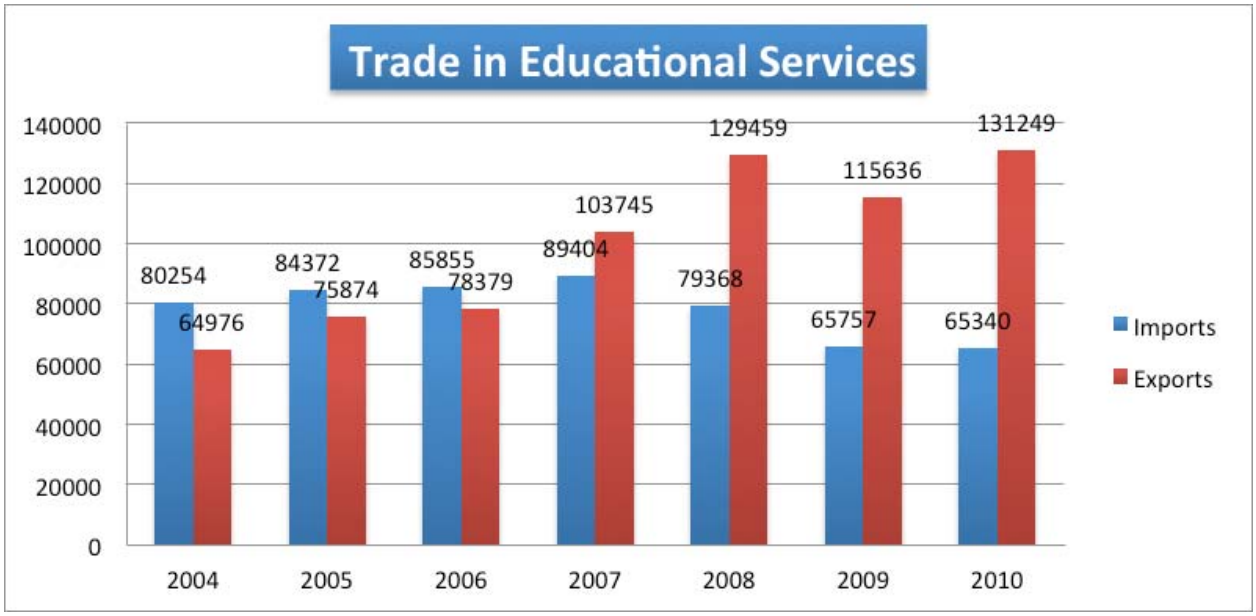
The first category mentioned above consists of educational services where individual students pay a tuition fee to education institutions and/or living costs when studying abroad. The second category mentioned above includes trade in educational and training services when the services are provided on a contract or fee.

Balance of Educational services trade for CARIFORUM

Since 2004, CARIFORUM's global exports in Educational services have steadily increased. During the period 2004-2006 the region was a net importer of educational services however, as of the year 2007 it become a net exporter in its trade with all countries. The Figure below presents a compilation of educational services data from the following CARIFORUM countries: The Bahamas, Barbados, Belize, Dominican Republic and Jamaica. It shows a positive trade balance on the order of $65 million. It is notable that for these calculations data for Trinidad and Tobago is not available.

Figure 23: Balance of Trade in Educational Services for Selected CARIFORUM countries

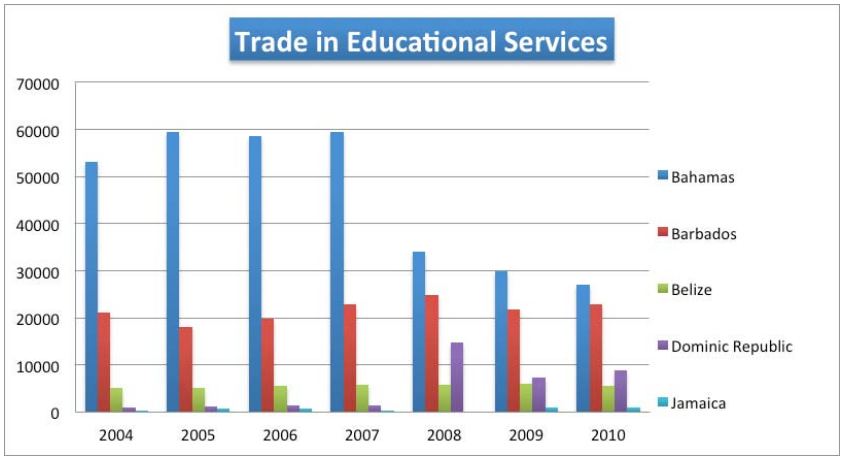
[56] Educational service exports include personal travel-education related expenditure and education services.



(Source: ITC Trade Map & Author's calculations – Unit: US Dollar thousand)

Of these countries, The Bahamas has traditionally been the largest importer of such services. Its proximity to the United States is likely to be the biggest factor influencing the trade and tertiary education spaces in the country are limited. Although the dramatic decline in imports since 2007 is also noteworthy. For the Dominican Republic, the figures show a dramatic increase in 2008 and declines thereafter.

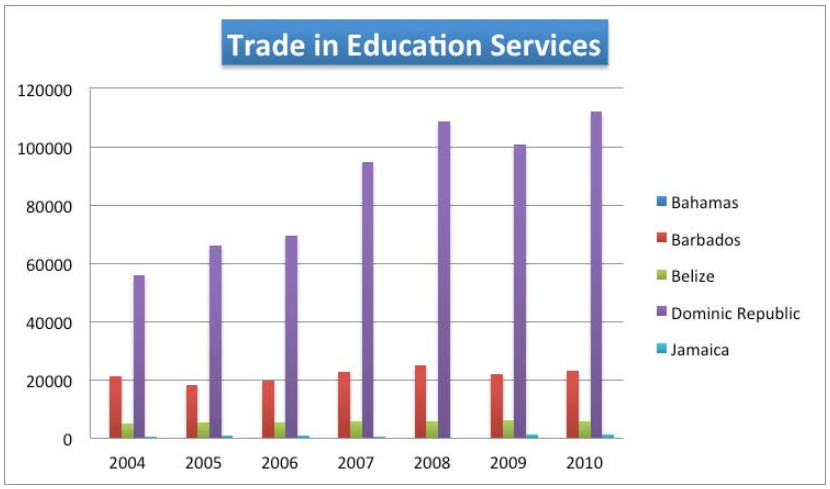
Figure 24: Imports of Educational Services for Selected CARIFORUM countries



(Source: ITC Trade Map & Author's calculations – Unit: US Dollar thousand)

The Dominican Republic shows from this data as the largest exporter of Education services, consistently surpassing that of Barbados by a wide margin. Notable also is the static nature of Barbados' and Belize's exports and the consistently low numbers for Jamaica.

Figure 25: Exports of Educational Services for Selected CARIFORUM countries



(Source: ITC Trade Map & Author's calculations – Unit: US Dollar thousand)

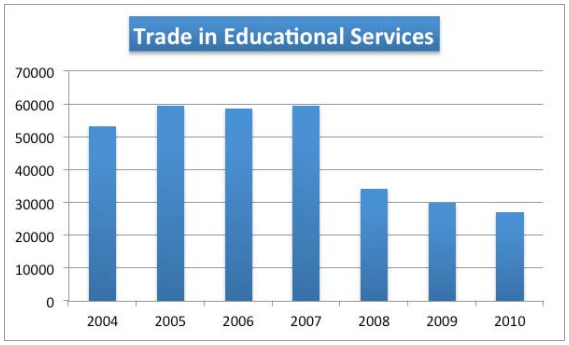
CARIFORUM Member States – Global Trade in Educational Services[57]

The Figures below present data on the trade in educational services of CARIFORUM countries. Data challenges are apparent. It should also be noted that Educational Services exports detailed below are defined to include personal travel-education related expenditure and education services.

1) **The Bahamas**

From the period 2004-2007, imports of education services were fairly substantial. Since 2008 however the Bahamas has steadily decreased its imports of educational services.

Figure 26: The Bahamas



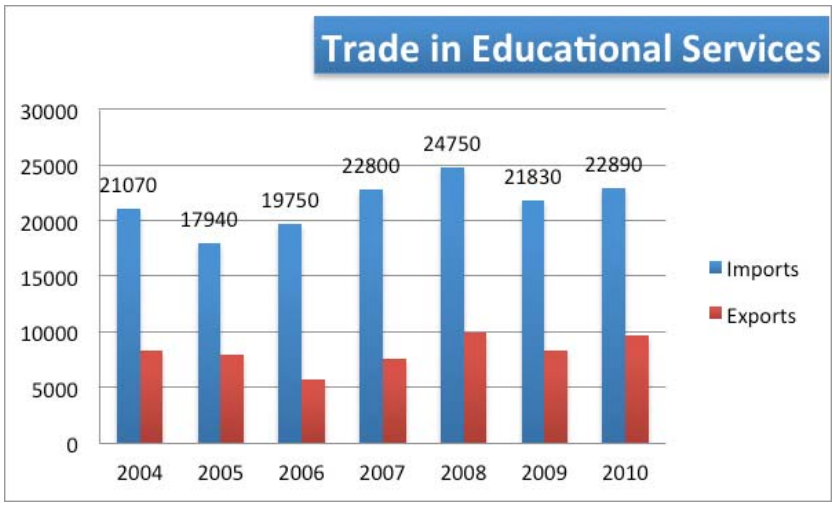
(Source: ITC Trade Map – Unit: US Dollar thousand)

* The above Figure was compiled based solely on the trade of education related expenditure. No export data was available.

[57] Educational service exports include personal travel-education related expenditure and education services.

2) **Barbados**

Figure 27: Barbados



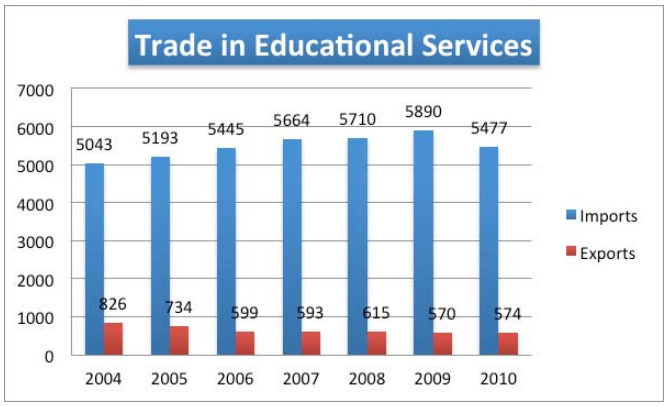
(Source: ITC Trade Map – Unit: US Dollar thousand)

Between 2004 and 2010 Barbados' trade in educational services was relatively constant. Despite the presence of a campus of the University of the West Indies, the country is a net importer of educational services.

3) **Belize**

From the period 2004-2010, Belize's trade in educational services was constant. Belize is net importer of educational services.

Figure 28: Belize

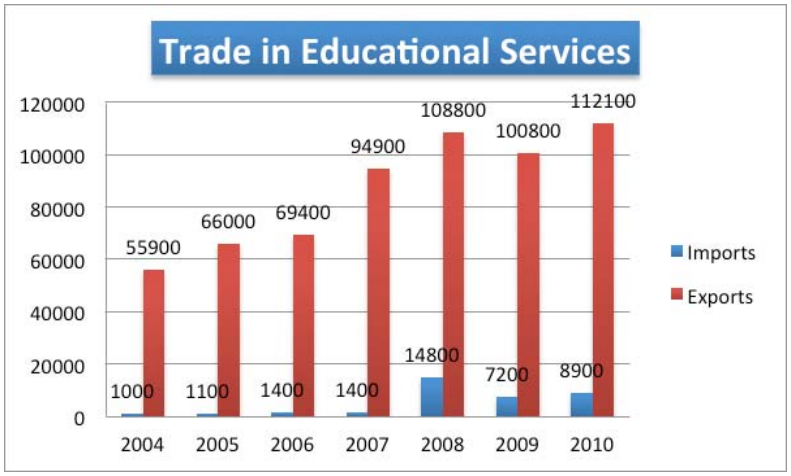


(Source: ITC Trade Map – Unit: US Dollar thousand)

* The above Figure was compiled based solely on the trade of educated related expenditure.

4) Dominican Republic

Figure 29: The Dominican Republic



(Source: ITC Trade Map – Unit: US Dollar thousand)

* The above Figure was compiled based solely on the trade of educated related expenditure.

The above Figure indicates a steady increase of the Dominican Republic's global exports of educational services during the period 2004-2010. The country is a net exporter of educational services.

5) Grenada

Data for Grenada was gleaned from information on tourism arrivals and the declared nature of the visit. They show that European consumers were minuscule. They accounted for less than 5% of total study visitors in 2005.

Figure 30: Study Visits - Grenada	
United Kingdom	190
France	0
Germany	15
Italy	3
Other Europe	21

Source: Grenada Tourism Board

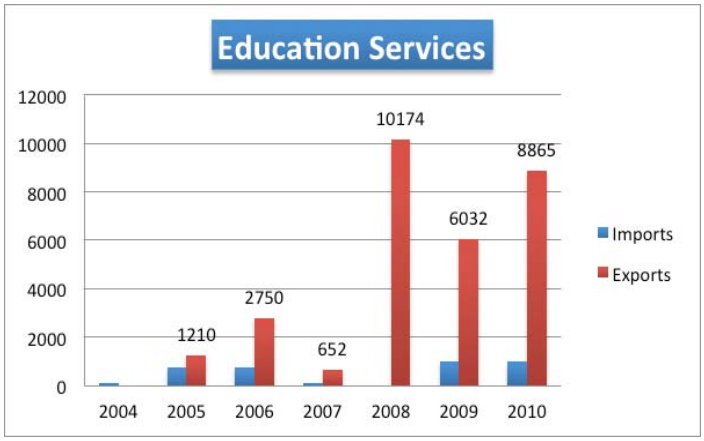
Figure 31: Total Stayovers	**Gross**

5,883	2005
4,679	2004

Source: Grenada Tourism Board

6) **Jamaica**

Figure 32: Jamaica



(Source: ITC Trade Map – Unit: US Dollar thousand)
*No data on travel expenditure available. Trade in educational services was calculated using data on the trade of 895 – Education Services.

The above Figure indicates the variations in Jamaica's trade in educational services during the period 2004-2010. During the period 2004-2007 trade in educational services was marginal, however, from the year 2008-2010 there was a substantial increase in Jamaica's exports.

7) **Saint Vincent and the Grenadines**

Data available shows a minuscule number of visits for study purposes to Saint Vincent and the Grenadines in 2010. No data is available on the visitors from "Other Countries" in Figure x below.

Figure 33: Travel Visits

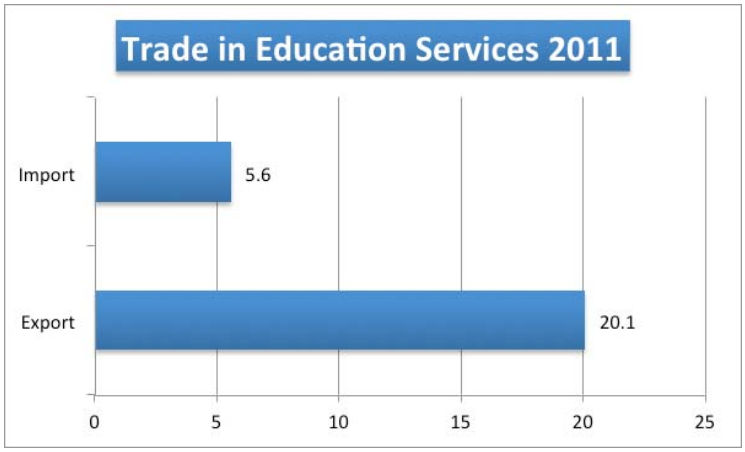
USA	105

Canada	34
South America	7
Other Countries	44

8) Trinidad & Tobago

In 2011, Trinidad and Tobago had a negative trade balance in Education Services. This despite the campus of the University of the West Indies being housed in St. Augustine, Trinidad. This is perhaps due to the number of foreign degree granting institutions present in the country.

Figure 34: Trinidad and Tobago



(Source: The Central Bank of Trinidad and Tobago and the Central Statistical Office of Trinidad and Tobago – Unit US Million)

Figure 35: Travel Visits - Trinidad and Tobago

Purpose of Visit	
Study	Year
5751	2004
5931	2005
5623	2006
5522	2007
2977	2008

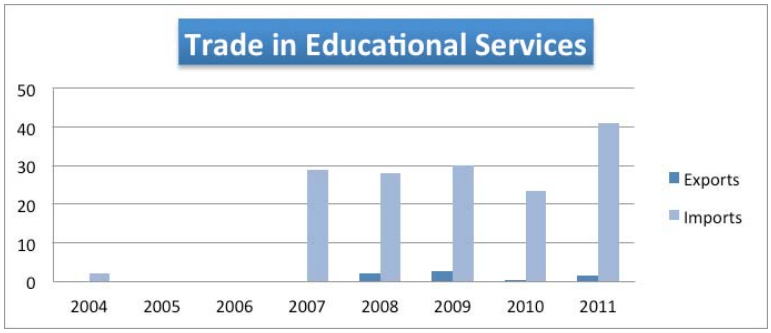
(Source: The Central Statistical Office of Trinidad and Tobago)

Trade in Educational Services[58] between CARIFORUM and Selected EU States: Overview

Trade in educational services data for CARIFORUM members and select EU members (Estonia, France, Germany, Italy, Malta, Spain, Netherlands & the United Kingdom) was compiled by combining the export and import flows of education-related expenditure and education services. Import and export data for trade in educational services was available only between individual EU members and the CARIFORUM region; and only global export and import data was available for individual CARIFORUM members. Therefore, no trade data is available between individual EU members and individual CARIFORUM members. In addition, no data for education-related expenditure and education services was available for the following EU countries: United Kingdom, Spain and the Netherlands.

Statistical data on the number of students attending university was also gathered in order to provide a more accurate account of trade in educational services. The Eurostat statistics on foreign students in tertiary education are based on data compiled by the host country, and therefore relate only to incoming foreign students to EU countries, not students from the EU going abroad.

Figure 36: Estonia, France, Germany, Italy and Malta's total trade in Educational services with CARIFORUM:



Source: Eurostat & Author's Calculations
*No data was available for: Germany for the period 2004-2008
France for the period 2004-2006
Estonia for the years 2008-2009 and 2011 (Imports)
Malta for the years 2006 and 2008-2009 (Exports)
*No data was available for Spain, the Netherlands and the United Kingdom

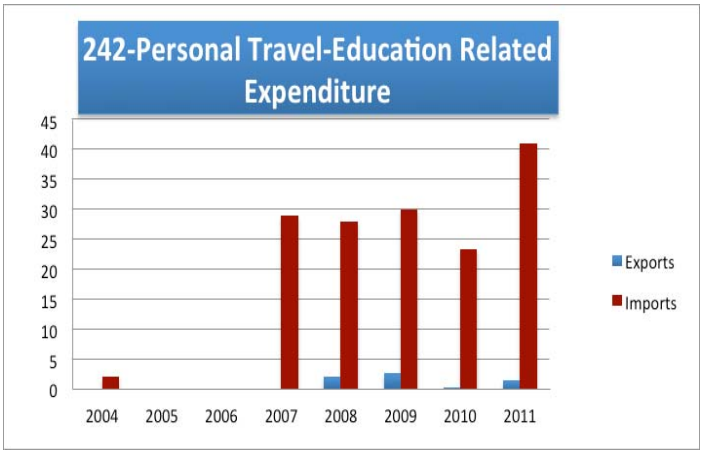
Figure 36 illustrates select EU member state's total trade in Educational services with CARIFORUM. It is worth noting that During the period 2004-2006, there was little to no trade taking place. Since 2007, however, EU states have experienced a significant trade deficit as exports from the CARIFORUM region significantly increased.

Figure 37 illustrates select EU member state's total trade in education related expenditure services with CARIFORUM. During the period 2004-2006, trade was marginal. Since 2007, however, there was a significant increase of imports from CARIFORUM.

[58] Educational service exports include personal travel-education related expenditure and education services.

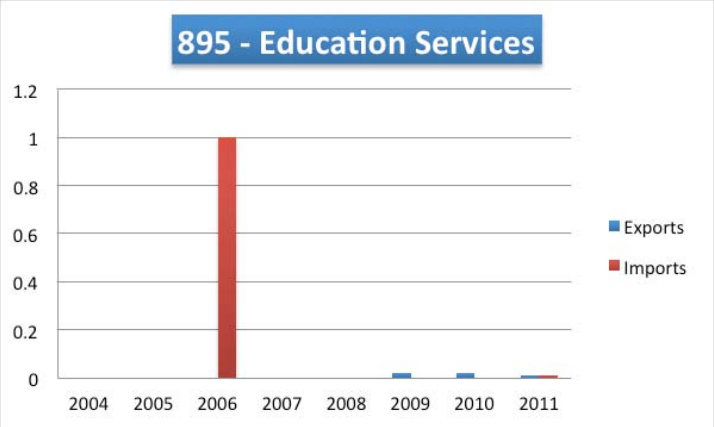
Figure 38 illustrates select EU member state's total trade in education services with CARIFORUM. Since 2004, trade between EU member states and CARIFORUM has been marginal. The year 2006 can be considered an outlier year as there was a substantial increase in imports from CARIFORUM states.

Figure 37: Estonia, France, Germany, Italy and Malta's total trade in education related



Source: Eurostat & Author's Calculations
*No data was available for: Germany for the period 2004-2008 (Exports) and Import data
France for the period 2004-2006
Estonia for the years 2008- 2011
Malta for the years 2006, 2008-2009 and 2011 (Exports)
*No data was available for Spain, Netherlands and the United Kingdom

Figure 38: Estonia, France, Germany, Italy and Malta's total trade in education services with CARIFORUM



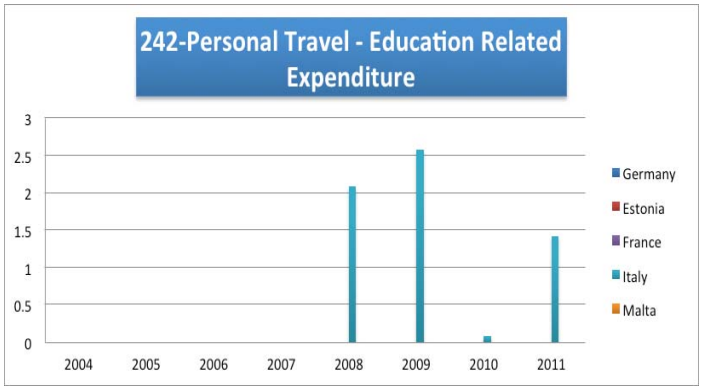
Source: Eurostat & Author's Calculations

*No data was available for: Germany for the period 2004-2008

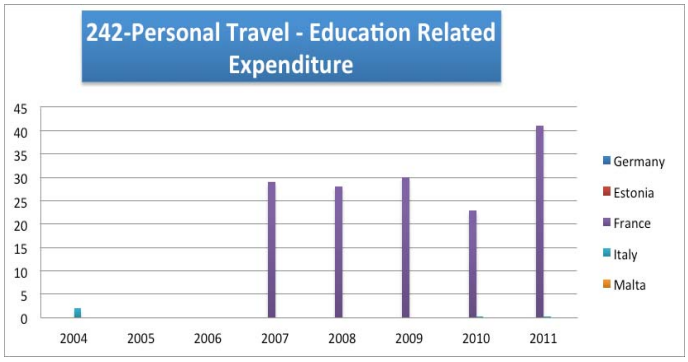
France for the period 2004-2006
Estonia for the years 2008-2009 and 2011 (Imports)
Malta for the years 2006-2009 (Exports)
*No data was available for Spain, Netherlands and the United Kingdom

Figure 39 seems to show exporting activity primarily from Italy, regarding Personal Travel-Education, while France appears to be the largest importer of these five EU Members.

Figures 39 (Exports) & 40 (Imports): Estonia, France, Germany, Italy and Malta's trade in education related expenditure services with CARIFORUM, 2004-2011



Source: Eurostat

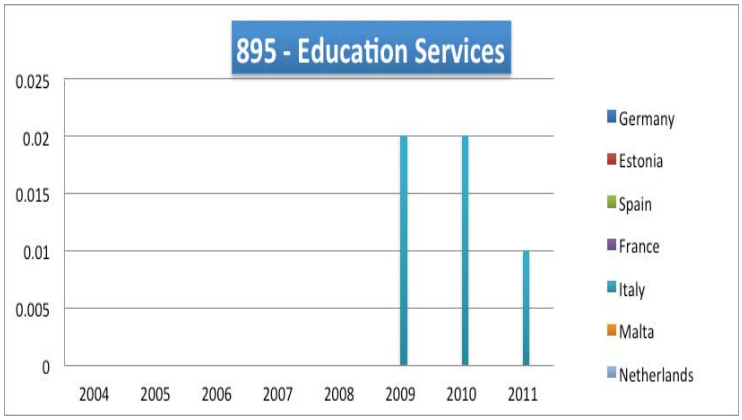


Source: Eurostat

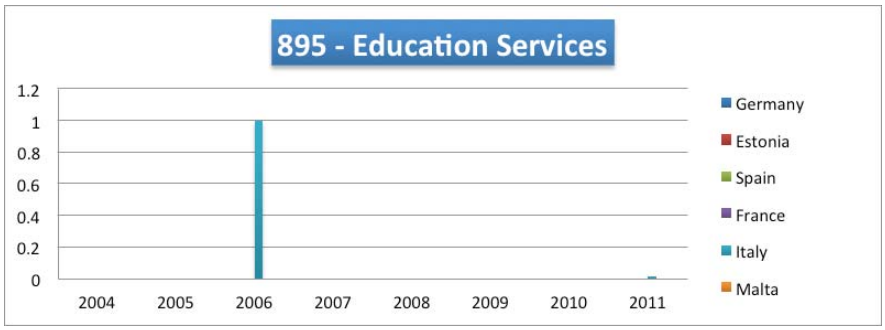
Figures 40 & 41 illustrate select EU member states imports in education services with CARIFORUM. Trade has been marginal, with Italy being the only trading partner on record. The year 2006 is the only year in which Italy imported education services from CARIFORUM. Since 2008, Italy has been a net exporter to the region.

Figures 40 (Exports) & 41 (Imports): Select EU Member State's[59] trade in education services with CARIFORUM

[59] Estonia, France, Germany, Italy, Malta, Netherlands, Spain and the United Kingdom



Source: Eurostat



Source: Eurostat

CARIFORUM citizens in tertiary education (ISCED 5-6)[60]:

Statistics have been located for the exports of education services through Mode 2 (Student Mobility) of the eight (8) EU Members under review in relation to the 15 CARIFORUM countries between 2004 and 2011. .Jamaica had the highest rate followed by Haiti, the Dominican Republic and Trinidad and Tobago. Attendance by other CARIFORUM members was marginal.

Figure 42 : Tertiary education attendance of CARIFORUM citizens in Select EU Member States for the year 2007

Member States	Germany	Estonia	Spain	France	Italy	Malta	Netherlands	**United Kingdom**	**TOTAL**

[60] ISCED97 - First and second stage of tertiary education (levels 5 and 6)

Jamaica	**16**	**0**	**10**	**15**	**3**	**0**	**1**	**2682**	2727
Trinidad & Tobago	24	0	1	47	4	0	4	**1519**	1599
Haiti	11	0	16	1428	6	0	0	**14**	1475
Dominican Republic	26	0	726	116	63	0	6	**40**	977
Suriname	2	0	1	63	0	0	874	**8**	948
Barbados	1	0	0	7	1	1	0	**518**	528
Guyana	7	0	1	45	1	0	1	**304**	359
Saint Lucia	3	0	0	26	0	1	0	**258**	288
The Bahamas	3	0	0	3	0	1	3	**249**	259
Dominica	7	0	23	34	12	0	1	**93**	170
Saint Vincent & the Grenadines	0	0	1	5	0	0	0	**164**	170
Grenada	0	0	2	2	1	0	0	**119**	124
Antigua & Barbuda	0	0	0	2	0	0	0	**74**	76
Belize	8	0	2	2	0	0	0	**52**	64
Saint Kitts & Nevis	1	0	0	3	0	0	1	**54**	59
TOTAL	109	0	783	1798	91	3	891	6148	9823

During the year 2007, the United Kingdom attracted the highest number of students from the Caribbean, followed by France, Netherlands and Spain. Jamaica had the highest number of students attending university in these selected European countries followed by Trinidad and Tobago, Haiti and the Dominican Republic. The total number of CARIFORUM students in these EU countries declined slightly between 2007 and 2010.

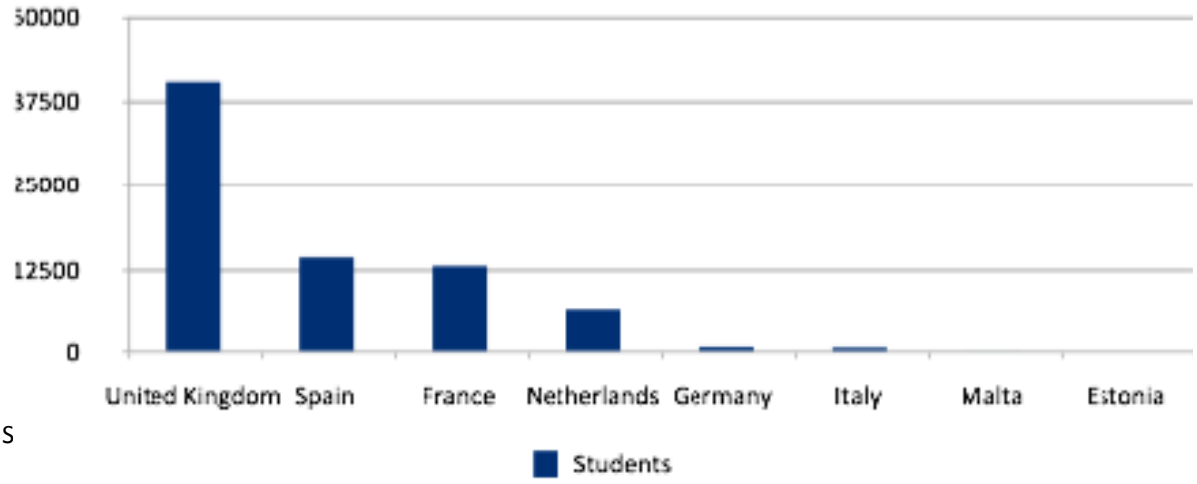
Figure 43: Tertiary education attendance of CARIFORUM citizens in Select EU Member States for the year 2010

Jamaica	**11**	**0**	**7**	**37**	**4**	**0**	**5**	**2300**	**2364**
Dominican Republic	34	0	1493	85	96	0	3	**39**	1750
Trinidad & Tobago	16	1	9	31	1	0	1	**1430**	1489
Haiti	18	0	58	1248	15	0	0	**13**	1352
Suriname	3	0	0	77	0	0	777	**12**	869
Barbados	1	0	1	3	0	0	1	**383**	389

Guyana	6	0	0	62	0	0	3	**264**	335
Saint Lucia	1	0	0	18	0	0	1	**241**	261
The Bahamas	7	0	3	1	0	0	3	**207**	221
Dominica	8	0	54	43	20	0	1	**71**	197
Saint Vincent & the Grenadines	0	0	0	2	0	0	0	**183**	185
Grenada	8	0	5	2	0	0	0	**99**	114
Belize	6	0	3	2	1	0	0	**46**	58
Antigua & Barbuda	1	0	0	4	0	0	0	**51**	56
Saint Kitts & Nevis	0	0	1	3	0	0	1	**40**	45
TOTAL	120	1	1634	1618	137	0	796	**5379**	9685

During the year 2010, the United Kingdom again had the largest exports of educational services through Mode 2 with respect to CARIFORUM, followed by Spain, France and the Netherlands. Jamaica had the highest number of students attending university followed by the Dominican Republic, Trinidad & Tobago and Haiti. Of note is the dramatic increase (over 50%) of students from the Dominican Republic in Spain from 2007.

Figure 44: Tertiary education attendance of CARIFORUM citizens:



S

Not surprisingly, the UK was the largest exporter during this period given the historical linkages with the Anglophone Caribbean. Spain was the destination of choice for nationals of the Dominican Republic and Belize. France received the most students from Haiti and the

Dominican Republic. The Figure below shows the dramatic increase in CARIFORUM students in Spain in 2011. From 2011 figures, Spain has displaced the United Kingdom as the largest exporter, receiving 7278 students from CARIFORUM. It will be interesting to monitor coming years to verify whether this trend continues.

Figure 45: Tertiary education attendance of CARIFORUM citizens in Spain for the year 2011

Dominican Republic	3551
Jamaica	2158
Dominica	969
Belize	304
Haiti	254
Grenada	245
Guyana	32
Trinidad & Tobago	5
The Bahamas	4
Saint Lucia	1
Antigua & Barbuda	0
Barbados	0
Saint Kitts & Nevis	0
Saint Vincent & the Grenadines	0
Suriname	0

The Figures (46-60) below provide data on student mobility for the individual CARIFORUM countries

Figure 46: Student Mobility - Antigua and Barbuda

Member States	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**
Estonia	0	0	0	0	0	0	0	:
France	1	5	1	2	1	3	4	1
Germany	1	0	0	0	0	1	1	:
Italy	1	1	1	0	0	0	0	:
Malta	1	1	1	0	0	0	0	:
Netherlands	0	0	0	0	0	1	0	:
Spain	0	0	0	0	0	0	0	0
United Kingdom	79	81	70	74	65	67	51	58
Total	**83**	**88**	**73**	**76**	**66**	**72**	**56**	**59**

Figure 47: Student Mobility - The Bahamas

EU Members	2004	2005	2006	2007	2008	2009	2010	2011
Germany	2	2	4	3	3	3	7	:
Estonia	0	0	0	0	0	0	0	:
Spain	0	0	0	0	0	1	3	4
France	1	1	1	3	2	1	1	0
Italy	1	1	1	0	4	2	0	:
Malta	0	2	1	1	0	1	0	:
Netherlands	2	2	2	3	3	3	3	:
United Kingdom	223	232	236	249	232	232	207	197
Total	**229**	**240**	**245**	**259**	**244**	**243**	**221**	**201**

Figure 48: Student Mobility - Barbados

Germany	3	2	3	1	2	2	1	:
Estonia	0	0	0	0	0	0	0	:
Spain	1	1	0	0	0	0	1	0
France	2	5	7	7	5	5	3	4
Italy	0	0	2	1	1	0	0	:
Malta	0	0	1	1	0	0	0	:
Netherlands	1	2	1	0	1	0	1	:
United Kingdom	468	479	509	518	420	407	383	378
Total	**475**	**489**	**523**	**528**	**429**	**414**	**389**	**382**

Figure 49: Student Mobility - Belize

Germany	15	13	11	8	8	7	6	:
Estonia	0	0	0	0	0	0	0	:
Spain	1	1	2	2	4	2	3	304
France	0	0	1	2	4	3	2	3
Italy	0	1	2	0	1	0	1	:
Malta	0	0	0	0	0	0	0	:
Netherlands	0	0	0	0	1	0	0	:

United Kingdom	44	46	72	52	51	51	46	39
Total	**60**	**61**	**88**	**64**	**69**	**63**	**58**	**346**

Figure 50 : Student Mobility - Dominica

EU Members	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**
Germany	3	5	6	7	11	8	8	:
Estonia	0	0	0	0	0	0	0	:
Spain	9	9	6	23	16	37	54	969
France	34	55	43	34	40	46	43	45
Italy	6	8	10	12	19	21	20	:
Malta	0	0	0	0	0	0	0	:
Netherlands	1	0	0	1	1	2	1	:
United Kingdom	50	47	119	93	98	87	71	78
Total	**103**	**124**	**184**	**170**	**185**	**201**	**197**	**1092**

Figure 51 : Student Mobility - Republica Dominicana

EU Members	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**
Germany	24	31	34	26	26	27	34	:
Estonia	0	0	0	0	0	0	0	:
Spain	298	491	562	726	625	1175	1493	3551
France	95	55	97	116	71	104	85	87
Italy	32	39	61	63	73	87	96	:
Malta	0	0	0	0	0	0	0	:
Netherlands	3	3	3	6	5	5	3	:
United Kingdom	35	29	39	40	44	37	39	34
Total Students	**487**	**648**	**796**	**977**	**844**	**1435**	**1750**	**3672**

Figure 52: Student Mobility - Dominica

EU Members	2004	2005	2006	2007	2008	2009	2010	2011
Germany	0	0	0	0	2	2	8	:
Estonia	0	0	0	0	0	0	0	:
Spain	1	3	7	2	2	2	5	245
France	5	4	4	2	4	1	2	2
Italy	1	1	0	1	3	2	0	:
Malta	0	0	0	0	0	0	0	:
Netherlands	0	0	1	0	0	1	0	:
United Kingdom	43	50	111	119	108	106	99	100
Total	**50**	**58**	**123**	**124**	**119**	**114**	**114**	**347**

Figure 53: Student Mobility - Guyana

EU Members	2004	2005	2006	2007	2008	2009	2010	2011
Germany	5	6	6	7	6	7	6	:
Estonia	0	0	0	0	0	0	0	:
Spain	0	1	0	1	0	2	0	32
France	46	49	50	45	45	52	62	51
Italy	3	3	1	1	0	0	0	:
Malta	0	0	0	0	1	1	0	:
Netherlands	3	3	2	1	4	4	3	:
United Kingdom	94	103	285	304	282	305	264	271
Total	**151**	**165**	**344**	**359**	**338**	**371**	**335**	**354**

Figure 54 : Student Mobility - Haiti

EU Members	2004	2005	2006	2007	2008	2009	2010	2011
Germany	14	14	12	11	10	12	18	:
Estonia	0	0	0	0	0	0	0	:
Spain	9	6	8	16	14	28	58	254
France	912	1026	1256	1428	1289	1320	1248	1733
Italy	5	4	5	6	12	12	15	:
Malta	0	0	0	0	0	0	0	:
Netherlands	2	1	0	0	1	0	0	:
United Kingdom	11	7	9	14	13	9	13	7

Total	**953**	**1058**	**1290**	**1475**	**1339**	**1381**	**1352**	**1994**

Figure 55: Student Mobility - Jamaica

EU Members	2004	2005	2006	2007	2008	2009	2010	2011
Germany	10	17	12	16	15	13	11	:
Estonia	0	0	0	0	0	0	0	:
Spain	2	5	3	10	3	7	7	2158
France	17	16	17	15	22	26	37	42
Italy	2	1	2	3	5	4	4	:
Malta	0	0	0	0	0	0	0	:
Netherlands	4	2	1	1	7	7	5	:
United Kingdom	979	938	2690	2682	2483	2485	2300	2213
Total	**1014**	**979**	**2725**	**2727**	**2535**	**2542**	**2364**	**4413**

Figure 56 : Student Mobility - St. Kitts and Nevis

EU Member	2004	2005	2006	2007	2008	2009	2010	2011
Germany	0	0	0	1	0	0	0	:
Estonia	0	0	0	0	0	0	0	:
Spain	0	0	934	0	1	0	1	0
France	4	4	6	3	1	2	3	6
Italy	0	0	1	0	1	0	0	:
Malta	0	1	1	0	0	0	0	:
Netherlands	0	0	0	1	1	1	1	:
United Kingdom	27	44	54	54	52	49	40	43
Total	**31**	**49**	**996**	**59**	**56**	**52**	**45**	**49**

Figure 57 : Student Mobility - St. Lucia

EU Members	2004	2005	2006	2007	2008	2009	2010	2011
Germany	2	2	1	3	2	3	1	:
Estonia	0	0	0	0	0	0	0	:
Spain	0	0	0	0	0	1	0	1
France	6	19	5	26	34	19	18	25
Italy	0	0	0	0	1	0	0	:
Malta	0	0	0	1	3	2	0	:

Netherlands	0	2	2	0	1	1	1	:
United Kingdom	180	180	295	258	272	283	241	202
Total	**188**	**203**	**303**	**288**	**313**	**309**	**261**	**228**

Figure 58: Student Mobility - St. Vincent and the Grenadines

EU Member	2004	2005	2006	2007	2008	2009	2010	2011
Germany	1	0	0	0	0	0	0	:
Estonia	0	0	0	0	0	0	0	:
Spain	0	0	0	1	1	0	0	0
France	2	4	25	5	6	3	2	2
Italy	0	1	0	0	1	0	0	:
Malta	0	0	0	0	0	0	0	:
Netherlands	0	0	0	0	0	0	0	:
United Kingdom	77	73	124	164	200	232	183	128
Total	**80**	**78**	**149**	**170**	**208**	**235**	**185**	**130**

Figure 59: Student Mobility - Suriname

EU Members	2004	2005	2006	2007	2008	2009	2010	2011
Germany	3	3	3	2	0	1	3	:
Estonia	0	0	0	0	0	0	0	:
Spain	0	1	2	1	43	0	0	0
France	25	56	63	63	75	90	77	70
Italy	0	0	2	0	0	0	0	:
Malta	0	0	0	0	1	1	0	:
Netherlands	951	983	915	874	844	787	777	:
United Kingdom	6	6	14	8	15	17	12	11
Total	**985**	**1049**	**999**	**948**	**978**	**896**	**869**	**81**

Figure 60: Student Mobility - Trinidad and Tobago

EU Members	2004	2005	2006	2007	2008	2009	2010	2011
Germany	23	27	20	24	17	19	16	:
Estonia	0	0	0	0	0	0	1	:
Spain	0	1	7	1	2	8	9	5
France	35	41	43	47	42	36	31	30
Italy	0	1	4	4	5	7	1	:
Malta	0	0	0	0	0	0	0	:
Netherlands	3	4	4	4	4	2	1	:
United Kingdom	683	767	1559	1519	1411	1403	1430	1250
Total	**744**	**841**	**1637**	**1599**	**1481**	**1475**	**1489**	**1285**

Framework for Conducting Business in the European Union

PESTLIED

The education sector is becoming increasingly commercialised, as funding is constrained, and thus business practices are increasingly common, if uncomfortable for many in the university environment.

Figure 61 below summarises the macro changes taking place in Europe, which will contribute to framing the business climate of the next ten to fifteen years.

Figure 61: Summary Macro Conditions

Political	· Unstable government – southern Europe, especially Italy · Left wing governments (France, Italy) increasingly advocating less austerity · Rise of new parties (UKIP in UK) – coalition politics, and debates on EU membership · Reshaping of European Union
Economic	· Debt and deficit reduction policies to continue for foreseeable future e.g. UK · Rebalancing of economic policies towards manufacturing, re-shoring and exports (e.g. UK) – away from over-reliance of financial services · Bank lending to SMEs constrained · Exchange rate volatility to continue
Social	· High unemployment rates in some EU markets – Spain (26.7% overall and 55.9% of under 25s), Italy, increasingly France · Low unemployment rates in northern Europe - Germany (5.7%) · Opening up of EU will bring migration from edges
Technological	· Innovation becoming part of mainstream economic development · Opportunities for education through EU 2014-2020 funding programmes e.g. Horizon 2020 · Increasing e-Government (e.g. Estonia) · Increasing move to smart devices, ubiquitous connectivity, portability, social media presence expanding · ICT driving innovation across sectors including education (MOOCs etc)
Legal	· IPR · Legislation on climate change and carbon reduction
International	· Cyber security threats to state and business assets of increasing concern, university expertise playing a role · Diverging attitudes to investment from China · Changing nature of EU relationship with Caribbean due to growth in other strategic markets, and financial constraints
Environmental	· Reducing carbon footprint · Smart and future cities
Demographic	· Ageing populations in Europe leading to increased opportunities for telemedicine and e-healthcare · Remote/ home working

Language

A pre-requisite for doing business successfully in Europe is the ability to communicate with local partners in the local language. The ability to converse in your customers' language is a recognised international business skill. Whilst it is not realistic for small firms to speak every foreign language, a basic investment in language training and customising sales and marketing collateral (e.g. website) is necessary for competing successfully in the major target market that they are looking to win business from.

Localisation

Localisation for non-English speaking markets. As Caribbean education providers look to internationalise and target customers in different non English speaking markets such as France, Spain etc. a stronger appreciation of international foreign languages and culture, and the necessity to customise collateral to local target markets will become increasingly important. A recent report into the localisation market carried out by Commons Sense Advisory found that the global market grew by 7.5 per cent in 2011 and the sector is now worth around US$31.4bn worldwide. Translation is still the most popular service, but there is a growing demand for services such as website globalization and localization.[61]

Business Culture

But it is not just about localising marketing collateral. Doing successful business in Europe is also about understanding European business cultures and etiquette. Often neglected, but a basic investment in time to understand a bit more about the business culture of the specific market that companies are targeting and how it applies to their approach and marketing collateral will contribute to sustainable success.

Whilst aspects of culture can descend in to caricature, the summary table below shows that different approaches are needed to deal with different cultures within the EU target markets. The markets chosen for this study have very different business cultures, as the table below demonstrates.

Figure 62: Summary of Cultural Approaches in Selected Markets[62]

Country	Five Ways to Succeed	Five Ways to Fail
UK	• Deliver on time without drama • Arrive at meetings punctually • If having difficulties ask advice immediately rather than risk missing a deadline • Check at the end of a meeting exactly what the Brits expect of you • Join them for a beer after work, or in the gym (many Brits now avoid alcohol)	• Boast about your achievements (but don't undersell) • Talk for an hour in a presentation • Phone people in the evening about work • Let a colleague down once he or she believes they can depend on you • Be patronising to women

[61] http://www.commonsenseadvisory.com/AbstractView.aspx?ArticleID=1426.
[62] The World's Business Cultures and How to Unlock Them, Tomalin and Nicks

Germany	• Demonstrate efficiency and punctuality • Be straightforward and direct • Do what you say you will do • Find out the rules and follow them • Respect the management hierarchy	• Be disorganised and ignore due process • Promise and fail to deliver • Do things without consultation • Go over the heads of line managers or reports • Be over familiar with colleagues
France	• Understand the free market versus social contract debate in France • Show appreciation of French culture • Make sure the French guests eat and drink well • Maintain a degree of formality until invited to use first names • Be logical and consistent in negotiations, and when reaching a decision, stick to it	• Do it all in English – if you have no French, apologise. • Ignore the French intellectual approach • Swear and drink too much • Dig up clichés about Anglo French conflict • Decline lunch invitations and buy a sandwich to eat at your desk
Italy	• Build good personal relationships and keep in contact • Show appreciation of Italy and especially of your partner's region • Remember that the top man or woman makes the decisions • Dress carefully and in a coordinated fashion for meetings • Name Italian products that you own or have enjoyed	• Criticise or belittle Italy and its economy • Remain solely on a business footing • Decline invitations to eat or drink with host • Wear jeans or trainers to the office on a Friday • Make jokes involving the Pope

Ease of Doing Business

The World Bank publishes an annual Doing Business in the EU survey[63], which contains information on aspects of doing business in EU markets. As the Figure below shows, the markets are ranked differently in terms of ease of doing business.

Again, there is a northern / southern European split, with the northern European ones generally ranked easier to do business. However, they may well be also more competitive markets to do business in and this is something for prospective exporters to note.

Figure 63: Comparative Ease of Doing Business (rank out of 185, 1 being easiest)

Economy	UK	Germany	Estonia	Netherlands	France	Spain	Italy	Malta
Ease of Doing Business	7	20	21	31	34	44	73	102

[63] http://www.doingbusiness.org/~/media/FPDKM/Doing%20Business/Documents/Profiles/Regional/DB2012/DB12-European-Union.pdf

Starting a Business	19	106	47	67	27	136	84	150
Dealing with Construction Permits	20	14	35	89	52	38	103	167
Getting Electricity	62	2	52	67	42	70	107	111
Registering Property	73	81	14	49	146	57	39	80
Getting Credit	1	23	40	53	53	53	104	176
Protecting Investors	10	100	70	117	82	100	49	70
Paying Taxes	16	72	50	29	53	34	131	27
Trading Across Borders	14	13	7	12	27	39	55	34
Enforcing Contracts	21	5	31	32	8	64	160	121
Resolving Insolvency	8	19	72	6	43	20	31	67

However in another survey on openness to trade and FDI, commissioned recently by the International Chamber of Commerce, Malta is ranked 5th followed by Netherlands (6th), Estonia (9th), Germany (22nd), UK (29th), France (35th), Italy (41st), Spain (44th). This survey also highlights the threats from increased protectionism.[64]

Exchange Rates

Exchange rates between the US dollar and sterling and the euro are forecast to remain volatile, and this poses an increased risk for Caribbean organisations looking to trade with clients and partners EU markets.

VAT

Vat rates vary across the selected markets vary and this will potentially impact on Education service providers if they set up in market.

Figure 64: VAT Rates[65]

COUNTRY	VAT (%)
Netherlands	21
United Kingdom	20
Germany	19
France	19.6
Estonia	20
Malta	18
Spain	21
Italy	21

[64] http://www.iccwbo.org/Global-influence/G20/Reports-and-Products/Open-Markets-Index/
[65] http://www.vatlive.com/vat-rates/european-vat-rates/eu-vat-rates/

For non-EU companies providing digital services (software, server facilities, online films, music, books, App's for phones etc) to EU consumers, there are special rules for charging and reporting VAT. Any services supplied digitally are considered as electronic services within the EU.[66] Non-EU companies providing the above digitised services to local consumers must comply with EU VAT compliance regime. Until recently, this meant registering their company with the tax offices of each country where they were selling, and then making regular filings and payments of VAT. [67]

However, this was all simplified in 2013. Non-EU companies may now register with just one of the 27 member states' tax authorities, and submit all filings and payments to that tax office. This will include country locations of each customer (with the appropriate national VAT rate charged), which the tax office will then use to allocate and split the VAT payment between the other appropriate tax authorities. Something similar is in the pipeline for EU companies for 2015.

Many larger non-EU companies have elected instead to form local companies in one of the EU countries, and contract with EU consumers through this company/branch. This gives special VAT advantages as (only until 2015), the branch would only use the VAT rate of the country where it is established. Based on this, many companies (e.g. Amazon) have elected to locate their European branches in Luxembourg with the EU's lowest VAT rate, 15% (3% on digital books).

Increasingly, non-EU companies are turning to agency agreements with local distributors to avoid the burden of charging and complying with VAT. This is perfectly lawful, and shifts the burden of the tax compliance to the distributor. Advice should always be taken on VAT rules in each individual case.[68]

Corporation Tax

Similarly, corporation tax rates vary across the region and this will potentially impact on education service providers.

Figure 65: Corporation Tax Rates[69]

COUNTRY	CORPORATION TAX (%)
Netherlands	25
United Kingdom	23

[66] These include Servers for websites and data storage (if the servers are within the EU, then special rules apply); Subscriptions to internet games, newspapers or other publications etc; Paid-for downloads of books, music or videos; Telephone or Figuret App's (Applications), ringtones etc which are charged for

[67] http://www.vatlive.com/eu-vat-rules/non-eu-companies-vat-on-electronic-services-books-video-apps-and-software/

[68] http://ec.europa.eu/taxation_customs/taxation/vat/how_vat_works/vat_on_services/

[69] http://www.kpmg.com/global/en/services/tax/tax-tools-and-resources/pages/corporate-tax-rates-Figure.aspx

Germany	29.55
France	33.33
Estonia	21
Malta	35
Spain	30
Italy	31.4

Regulatory and Administrative Framework

The European Commission's *Eurypedia* website provides comprehensive information on European national Education Systems and the specific regulatory and legal framework as relates to each individual country across the ranges of education provision.70

The overall basis for EU-wide co-operation in education and training is set out in the "ET 2020" strategic framework adopted in May 2009.[71] This links into the wider EU 2020 strategy on growth and jobs.

With actions at all levels of education and training, there are four objectives to ET 2020: making lifelong learning and mobility a reality; improving the quality and efficiency of education and training; promoting equity, social cohesion and active citizenship; and enhancing creativity, innovation and entrepreneurship. Activities also contribute to the Bologna intergovernmental process in the field of higher education.

Key elements include:-

- The strategic framework for European cooperation in education and training ("ET 2020"): Policy framework; implementation; EU programmes supporting the policy framework and lifelong learning
- Lifelong learning strategies: Policy framework; implementation and European tools
- Higher Education Reform: Policy framework; university business dialogue; programmes supporting higher education, including the Bologna Process
- School education policies: Policy framework and monitoring instruments; programmes supporting school education
- Vocational education and training policies: Policy framework and monitoring instruments; programmes supporting vocational education and training
- Adult education policies: Policy framework and monitoring instruments; programmes supporting adult education
- Facilitating mobility: Policy framework; mobility instruments
- Promoting multilingualism: Policy framework; programmes supporting multilingualism

[70] https://webgate.ec.europa.eu/fpfis/mwikis/eurydice/index.php?title=Home
[71] http://ec.europa.eu/education/lifelong-learning-policy/policy_en.htm

- ICT for innovation and lifelong learning (Information and Communication Technology): Policy framework; programmes supporting ICT
- The European Institute of Innovation and Technology
- Measuring progress in education and training (Statistics, indicators and benchmarks)

At the EU level and specifically around the areas of interest for this study, political cooperation within the EU was strengthened through the education and training 2010 work programme which integrated previous actions in the fields of education and training. This strategy set a number of benchmarks to be achieved by 2020, namely:-

- an EU average of at least 20% of higher education graduates should have had a period of higher education-related study or training (including work placements) abroad, representing a minimum of 15 European credit transfer and accumulation system (ECTS) credits or lasting a minimum of three months
- an EU average of at least 6% of 18 to 34 year-olds with an initial vocational education and training qualification should have had an initial vocational education and training (VET) related study or training period (including work placements) abroad lasting a minimum of two weeks, or less if documented by Europass
- the share of employed graduates (20 to 34 year-olds) having left education and training no more than three years before the reference year should be at least 82 %

While the Bologna72 process (which launched the European Higher Education Area in 2010, in which students can choose from a wide and transparent range of high quality courses and benefit from smooth recognition procedures) put in motion a series of reforms to make European higher education more compatible, comparable, competitive and attractive for students, it is only one strand of a broader effort concerning higher education.

The modernisation agenda of universities is supported through the implementation of the 7th EU framework programme for research and the competitiveness and innovation programme as outlined earlier (this will become Horizon 2020). Furthermore, to establish synergies between the Bologna process and the Copenhagen process73 (for enhanced European cooperation in vocational education and training), the European Commission and EU Member States have established a European qualifications framework for lifelong learning (EQF).

Two policy processes are worth mentioning within this context:-

- Quality and Mobility - the Bologna process put in motion a series of reforms to make European higher education more compatible, comparable, competitive and attractive for students. Its main objectives were: the introduction of a three-cycle degree system (bachelor, master and doctorate); quality assurance; and recognition of qualifications and periods of study. One of the operational goals of the process was to remove the obstacles to student mobility across Europe, and more broadly support the mobility of

[72] http://ec.europa.eu/education/higher-education/bologna_en.htm
[73] http://ec.europa.eu/education/vocational-education/copenhagen_en.htm

students, teachers and researchers. The Bologna process set out plans to create a European higher education area (EHEA) and in March 2010 the ministers of the 47 participating countries adopted the Budapest-Vienna Declaration and officially launched the EHEA. Ministers meet every two years to reflect on the progress made, and in April 2012 they released a communiqué from Bucharest identifying three key priorities – mobility, employability and quality – while emphasising the potential for higher education to contribute to growth and jobs.

- Training and vocational education - since 2002 national authorities and social partners from European countries have taken part in the Copenhagen process which aims to promote and develop vocational education and training (VET) systems; at the time of writing 33 countries are active in this process. In June 2010, the European Commission presented its proposals for 'a new impetus for European cooperation in vocational education and training to support the Europe 2020 strategy'. In December 2010 the priorities for the Copenhagen process for 2011 to 2020 were set, establishing a vision for vocational education and training to be reached by the year 2020.

The policy framework continues to focus on the performance of education and training systems at all levels, increasing participation in tertiary education (via programmes like Erasmus) and increasing university business collaborations as part of the EU innovation and competitiveness agendas.

Improved quality assurance frameworks are being put in place across Europe in part to strengthen domestic provision, and in the UK for example this is taking place across the school, college, University and English language provision, as part of the UK Governments recently published new industrial strategy for Education exports.[74] Key stakeholders such as Ofsted, the Quality Assurance Agency (QAA), British Council, Higher Education International Unit are working with Department for Education on this.

Whilst the UK leads Europe in terms of provision, other countries that are not traditional competitors of the UK, particularly other European countries, are looking to increase their share of international students. France is considering a change to legislation which would allow France's public universities to offer courses in foreign languages. The aim is to make French universities more attractive to foreign students (and complements another legal change from last year which lifted restrictions on foreign students' right to work in France). Similarly, the Netherlands has over 1,500 international study programmes available, 75% of which are taught entirely in English, and Germany are becoming increasingly competitive by offering courses in English and providing job opportunities for international graduates.

Visa and work permit regimes will continue to influence movement of students and people across European borders. The UK has carried out a reform of the visa regulations and the

[74] International Education, Global Growth and Prosperity, UK Industrial Strategy for Education, BIS, July 2013

educational oversight regime for colleges sponsoring international students in 2011 has been effective in rooting out abuse and improving standards, so institutions and prospective students are operating within a stable and transparent system.

New EU Procurement Directive

One area worth mentioning is the new EU Procurement Directive. In December 2011, as announced in the Single Market Act, the Commission adopted its proposals on public procurement. These proposals are part of an overall programme aiming at an in-depth modernization of public procurement in the European Union. This programme includes the revision of Directive 2004/17/EC (procurement in the water, energy, transport and postal services sectors) and 2004/18/EC (public works, supply and service contracts), as well as the adoption of a directive on concessions, which were until now only partially regulated at European level.[75]

One of the main features is to encourage access to public procurement for SMEs: access will be increased and made easier through measures to cut the administrative burden and strong incentives to divide tenders into lots and limit the financial capacity requirements for the submission of a tender.[76] This is currently being negotiated and will bring in substantial changes to procurement law within the EU, especially from public bodies. This will essentially make it easier for smaller businesses providing services to qualify for public tenders and access some of the work.[77]

75 http://ec.europa.eu/internal_market/publicprocurement/modernising_rules/reform_proposals/index_en.htm

76 http://europa.eu/rapid/press-release_IP-11-1580_en.htm?locale=en

77 http://www.anthonycollins.com/briefings/uk-response-commission%E2%80%99s-proposed-new-eu-procurement-directive-local-government

Opportunities for trade in Services in the selected States in the selected Sectors

a. Use of services in the region

Market Overview

The Figure below summarises key education data from a 2012 OECD Report into the Education sector, thought it should be noted that this is based on 2009 data.

Fig 66: Summary from OECD Education at a Glance Report (based on 2009 data)[78]

Market	Summary Points
Netherlands	• Ranked 11th in most recent Pisa tests for science, 11th for maths and 10th for reading • Trends in public expenditure on education 2009 versus 2000 - - as a proportion of total public expenditure – UP - as a proportion of GDP - UP • Trends in private expenditure as a proportion of public and private expenditure 2009 versus 2000 – UP • Highest number of instruction hours of selected markets in public institutions across 7-14 age range – well over 7500 hours • Salary cost of teacher per student is US$3740 (average for OECD country data available is US$2856), thus higher than average • 6.2% GDP spent on education, marginally below OECD average (6.3%)
UK	• Ranked 16th in most recent Pisa tests for science, 28th for maths and 25th for reading • Trends in public expenditure on education 2009 versus 2000 - - as a proportion of total public expenditure – UP - as a proportion of GDP - UP • Trends in private expenditure as a proportion of public and private expenditure 2009 versus 2000 – UP (significantly) • Relatively high number of instruction hours of selected markets in public institutions across 7-14 age range (England) • Salary cost of teacher per student (England) is US$2577 (Ireland US$3578), thus below OECD average • 6.0% GDP spent on education, below OECD average level
Germany	• Ranked 13th in most recent Pisa tests for science, 16th for maths and 20th for reading • Trends in public expenditure on education 2009 versus 2000 - - as a proportion of total public expenditure – UP - as a proportion of GDP - UP • Trends in private expenditure as a proportion of public and private expenditure 2009 versus 2000 – UP (slight increase) • Relatively low number of instruction hours of selected markets in public institutions across 7-14 age range • Salary cost of teacher per student is US$4154, quite a bit higher than OECD average • 5.3% GDP spent on education, below OECD average

[78] http://www.keepeek.com/Digital-Asset-Management/oecd/education/education-at-a-glance-2012_eag-2012-en

France	• Ranked 27th in most recent Pisa tests for science, 22nd for maths and 22nd for reading • Trends in public expenditure on education 2009 versus 2000 - - as a proportion of total public expenditure – DOWN - as a proportion of GDP – DOWN (marginally) • Trends in private expenditure as a proportion of public and private expenditure 2009 versus 2000 – UP • Relatively high number of instruction hours of selected markets in public institutions across 7-14 age range • Salary cost of teacher per student is US$2368, below OECD average • 6.3% GDP spent on education, at OECD average level
Estonia	• Ranked 9th in most recent Pisa tests for science, 16th for maths and 13th for reading • Trends in public expenditure on education 2009 versus 2000 - - as a proportion of total public expenditure – DOWN - as a proportion of GDP - UP • Trends in private expenditure as a proportion of public and private expenditure 2009 versus 2000 – 5.8% (no data for 2000) • Pupils have some of the lowest numbers of hours in the classroom each year among developed countries (just over 5500) • Teachers' salary cost per student is relatively low at US$844 compared with OECD average • Expenditure on education rose sharply between 2000 and 2009, but restricted by recession • 6.3% GDP spent on education, at OECD average level
Spain	• Ranked 34th in most recent Pisa tests for science, 36th for maths and 33rd for reading • Trends in public expenditure on education 2009 versus 2000 - - as a proportion of total public expenditure – DOWN (marginally) - as a proportion of GDP - UP • Trends in private expenditure as a proportion of public and private expenditure 2009 versus 2000 – UP • Relatively high number of instruction hours of selected markets in public institutions across 7-14 age range • Salary cost of teacher per student is US$4743, and this has risen sharply since 2000 • 5.6% GDP spent on education, marginally above OECD average
Italy	• Ranked 35th in most recent Pisa tests for science, 35th for maths and 29th for reading • Trends in public expenditure on education 2009 versus 2000 - - as a proportion of total public expenditure – DOWN - as a proportion of GDP - UP • Trends in private expenditure as a proportion of public and private expenditure 2009 versus 2000 – UP (fairly substantial increase) • Relatively high number of instruction hours of selected markets in public institutions across 7-14 age range • Salary cost of teacher per student is US$2994, which has actually decreased since 2000 • 4.9% GDP spent on education, marginally above OECD average
Malta	• Ranked 40th in most recent Pisa tests for science, 41th for maths and 45th for reading • 5.4% GDP spent on education (2009), marginally above OECD average

Application/ Opportunity Areas

Key areas include:

- High Costs in some European countries

- New Business Models in Education
- EU Student Mobility Overseas
- Internationalisation - Growth in Transnational Education
- Skills Shortages and Employability (Vocational Training)
- EU 2014-20 and Horizon 2020

High Costs in some European countries

Whilst falling costs in some market sectors may reduce the chance of purely cost arbitrage opportunities for Caribbean entities, the steeply rising cost in tertiary education for some countries such as the UK, combined with increasing use of e-delivery and changing business models may indeed provide new opportunities for the Caribbean. Attracting foreign students is a highly competitive business and the need to innovate and provide value for money is critical to success.

There are wide disparities in the tertiary education markets in Europe, in terms of cost. In particular, opportunities around attracting European students in some key areas, for example, in the medical and veterinary field. According to sources the cost of studying medicine in the UK can now reach £70,000 over a five year period, Tuition fees in the England are now around £9,000-00 per annum.

The Figure below summarises the annual costs for a degree in the selected European markets. Estimating total costs over the course of a degree lifetime is problematic, as lengths of degrees and living costs in the selected EU markets can vary greatly. Nevertheless, the trend is towards increasingly costly delivery of education, and the cost to the student increasing. Arguably, the greatest challenge for universities is the change in their funding structure, which has major implications for financial stability and planning.

The UK is a case in point. Whilst total teaching income is rising, the Higher Education Funding Council for England (HEFCE) funding is due to reduce from around £4 billion in 2011-12 to around £1 billion by 2014-15. Concurrently, tuition fee income is due to increase by £1.5 billion per annum between 2012-13 and 2014-15.[79]

Fig 67: Annual Degree Costs in Selected Countries for EU students[80]

Country	Tuition Fees	Comment
Netherlands	EU students have to pay tuition fees from c. EUR 1200 to c. EUR 2200 per annum	
UK	£9,000-00 per annum £1,820-00 in Scotland for Scottish residents apart from Vet and Law	Fee levels vary but are increasingly towards the upper end
Germany	Students are usually charged a tuition fee of approximately EUR 500 per semester depending on the federal state where the school is located	

[79] http://www.resource-group.com/In_Focus_Education_Issue.pdf
[80] Various sources, including http://www.studyineurope.eu/tuition-fees

France	Students are charged tuition fees at public universities from EUR 177 / year for bachelors' degrees (licence), to EUR 245 / year (master's programs) and EUR 372 / year (PhD degrees - Doctorat)
Estonia	
Malta	
Spain	Students pay tuition feed on a per credit basis, starting at c. EUR 9.50 per credit
Italy	Up to £2400 per annum

Whilst education and study financing models in the UK mean that a graduate only pays back ineviFigure borrowings once salary has reached a certain level, it increasingly means individual graduate debt levels will soar. Those students that want to mitigate against this will look for (lower cost, more flexible) alternatives. Discourse around return on investment ('bang for buck' etc) will increasingly be important in education marketing collateral.

New Business Models in Education

Two converging trends mean that new business models are emerging. Firstly, frustration with the performance of traditional education institutions with students taking longer to complete degrees, employers continuing to complain graduates lack the skills they need; and secondly, tuition costs are rising faster than inflation and household earnings. The growth in on-line learning is just one example, and presents Caribbean operators with a potential opportunity to tap into the lucrative EU education market.

A 2013 McKinsey Quarterly report[81] forecasts two versions of hybrid learning experiences in higher education. "The first would still be campus-centric, with technology allowing a more efficient and effective reengineering of the learning experience, with lectures moving exclusively online, and with class time reserved for small-group problem solving and conversation. The other hybrid mode would be digital-centric (and much less costly), with a core online component supplemented, perhaps, by self-organized study groups, as we see happening already in MOOCs.

Some digital-centric options may be associated with traditionally accredited college brands; others may live purely in the world of alternative credentials. Students from wealthier families and those with adequate financial aid may prefer the residential experience (and the lifelong personal networks that come with it). But the cost–value equation will shift so rapidly in the years ahead, and employers will develop so great a stake in the new system they help design, that millions of students will probably flourish without ever setting foot on traditional campuses."[82]

[81] www.mckinsey.com
[82] McKinsey Quarterly, May, 2013

Whilst Europe has been generally slower at adopting elements of this emerging business model compared to the US[83], there are new initiatives, such as start-up business Iversity in Germany[84], and Futurelearn in the UK[85].

UK Case Study– Futurelearn

The Open University, the British distance-learning university, has pooled 10 UK universities including Exeter, Bristol and Southampton, into a new venture, Futurelearn.[86] Students from the UK and around the world will have free access to some of the country's top universities thanks to Futurelearn Ltd, an entirely new company launched by The Open University (OU) in December 2012. The universities of Birmingham, Bristol, Cardiff, East Anglia, Exeter, King's College London, Lancaster, Leeds, Southampton, St Andrews and Warwick have all signed up to join.

Futurelearn is independent but majority-owned by the OU. It has several aims, namely to; bring together a range of free, open, online courses from leading UK universities, that will be clear, simple to use and accessible; draw on the OU's expertise in delivering distance learning and pioneering open education resources to underpin a unified, coherent offer from all of its partners; increase accessibility to higher education (HE) for students across the UK and in the rest of the world.

Futurelearn has been warmly welcomed by UK government. The Minister for Universities and Science responsible for higher education in England, David Willetts, said: "The UK must be at the forefront of developments in education technology. Massive Open Online Courses (MOOCS) present an opportunity for us to widen access to, and meet the global demand for, higher education. This is growing rapidly in emerging economies like Brazil, India and China. Futurelearn has the potential to put the UK at the heart of the technology for learning agenda by revolutionising conventional models of formal education. New online delivery tools will also create incredible opportunities for UK entrepreneurs to reach world markets by harnessing technology and innovation in the field of education."

The advance of digital technology will not just have an effect on the delivery of courses, but also in the marketing and promotion of courses and in student attraction, though research (albeit limited) to date in the UK shows that current efforts are somewhat inadequate.[87] European students are generally tech savvy and increasingly influenced by non-traditional media and communications platforms.

It is interesting to note for any Caribbean providers of educational technology, that in a recent survey of Europe's education technology companies, the UK was a key provider, whilst continental Europe remained relatively absent.[88] This might be explained by the less centralised

[83] http://techcrunch.com/2013/03/11/iversity-moocs-pivot/
[84] http://www.iversity.org/
[85] www.futurelearn.com
[86] Financial Times, http://www.ft.com/cms/s/0/8de6072c-60a0-11e2-a31a-00144feab49a.html#ixzz2R7uDPAgG
[87] http://www.guardian.co.uk/higher-education-network/blog/2013/apr/17/university-student-recruitment-social-media
[88] http://www.e-learningcentre.co.uk/blog/2013/06/who-are-in-the-european-edtech-top-20/

approach the UK has to its education system in general compared to countries such as France and Germany.

EU Student Mobility Overseas

For Caribbean providers looking at the EU market, student mobility overseas provides indicators on which markets are the most popular. According to the OECDs Education at a Glance, 2012, Europe continues to be the preferred destination for students studying outside their country, with EU countries hosting 41% of all international – EU and non-EU – students. International students make up 10% or more of enrolments in tertiary education in the UK and account for more than 20% of enrolments in advanced research in the UK.

Across the EU, 76% of foreign students come from another EU country.[89] Within the EU, the UK has the highest share of EU mobile student market (28.6%) followed by Germany (14.2%), with France fourth (10.1%).[90] The main vehicle for this is the Erasmus programme, with Spain, France and Germany having the highest number of participants in this scheme designed to encourage intra EU mobility.

The UK had 23,039 students abroad in 2010, with the US the top destination receiving over a third of those going abroad to study. France was second some way behind.

The Figure below shows the flow of tertiary education students between selected EU markets and also with selected Caribbean markets. Germany sends a lot of students to the Netherlands and France, but not that many to Caribbean. In contrast, the UK sends a lower number to Europe, but more to the Caribbean compared to the other selected markets. Grenada and Trinidad and Tobago receive the highest number in the Caribbean from the UK, whilst from other markets the numbers are somewhat negligible.

Fig 68: Flow of Tertiary Education Students between Selected EU markets and Selected Caribbean Markets[91] (numbers of students)

TO EUROPE	Neths	UK	Germ	France	Estonia	Malta	Spain	Italy
Netherlands	-	3208	840	712	<5	-	291	96
UK	232	-	1342	2704	11	<5	531	183
Germany	17052	15162	-	7129	18	-	1439	1239
France	417	13602	5834	-	11	-	1868	854
Estonia	30	952	548	113	-	-	50	52
Malta	<5	989	32	17	-	-	11	24
Spain	223	5617	4144	4129	8	<5	-	386
Italy	253	6484	5171	5851	14	<5	3116	-

[89] http://europa.eu/rapid/press-release_IP-12-950_en.htm
[90] Total EU mobile students 430,664
[91] K3 analysis from http://www.uis.unesco.org/Education/Pages/international-student-flow-viz.aspx

TO CARIFORUM	Trinidad &Tobago	Grenada	Cayman	Bermuda	BVI	Barbados
Netherlands	<5	<5				
UK	25	82	10	8	<5	
Germany		<5		<5		
France	<5	<5		<5		
Estonia						
Malta						
Spain		<5	<5			
Italy		<5		<5		<5

Medical Education – Case in Point

The rising costs of medical education in Europe, coupled with the projected shortfall in doctors, and rise in medical tourism, should mean that there is a theoretical potential market for Caribbean countries, primarily via Mode 2. Countries like Saint Kitts and Nevis have successfully tapped the US market, but it remains to be seen whether this model could work for Europe. Extending the packaged offer to include simplified visa access etc could prove attractive for some students finding it difficult to access the mainstream European market. However, the competition is fierce

Increasing mobility, customisation of choice, and increasingly cosmopolitan culture in Europe means an increasing tendency to travel abroad to get educated, though cost is just one element of the value proposition.

"*There is interest in an increasing diversity of subject areas, too. Medicine – a course that Flouch calls the "vanguard to transnational education" – has long since tempted students to universities in central Europe, including those in the Czech Republic, Hungary and Romania, where fees are low. Italy offers some excellent medical degrees with fees of €686 to €3,000 a year, depending on parental income, and that the University of Malta runs medical programmes for free. All of these qualifications are all recognised by the General Medical Council. However, this year, he notes that employment-focused programmes are increasingly popular – "areas such as fashion design, sports management, game design, and business. I'm also noticing more UK students applying to liberal arts and sciences programmes offered by Dutch universities." These programmes see students tackling a wide range of subjects and specialising as they progress*"[92]

Transnational Education (TNE)

[92] http://www.independent.co.uk/student/study-abroad/wondering-where-to-study-cast-your-net-overseas-8532192.html

TNE is a growing trend in the international education field. Within Europe data shows that students from the UK, France, Germany, Spain and Italy are likely to travel abroad.

According to data released in January 2013 by Britain's Higher Education Statistics Agency (HESA)[93], the number of students studying 'wholly overseas' for a UK higher education qualification increased by more than 95,000 in 2011 to 503,795 - 75,000 more than the number of international students that were enrolled at institutions in the UK (428,225) and approximately one-sixth of all students studying for UK awards.

Of those students, 113,060 were enrolled abroad via distance education, 291,745 on programs run in collaboration with a partner organization, 86,670 in 'other' arrangements including collaborative provision, and just 12,315 on overseas branch campuses. The Observatory on Borderless Higher Education (OBHE)[94], does note however in a recent report that British universities have nearly doubled their number of branch campuses in the past two years to 25.

According to statistics from the UK's Higher Education Statistics Agency (HESA) the Top 20 countries for UK TNE provision in 2010-11 were[95]:-

Fig 69: Top 20 countries for UK TNE provision

Country	Numbers of Students	Percentage of Total
Malaysia	58,115	11.5%
Singapore	46,865	9.3%
China	35,825	7.1%
Pakistan	34,905	6.9%
Hong Kong, China	29,455	5.8%
Nigeria	22,425	4.5%
Ghana	15,755	3.1%
Ireland	15,215	3.0%
Trinidad and Tobago	**13,385**	**2.7%**
Greece	11,515	2.3%
United Arab Emirates	11,000	2.2%
Kenya	10,980	2.2%
Russia	9,055	1.8%
Mauritius	8,775	1.7%
Egypt	8,720	1.7%
Oman	8,705	1.7%
India	8,340	1.7%

[93] www.hesa.ac.uk
[94] www.obhe.ac.uk
[95] International Higher Education Facts and Figures, Winter 2012-13, UK Higher Education International Unit

Zambia	7,355	1.5%
Germany	7,210	1.4%
Uganda	6,880	1.4%

Interestingly Trinidad and Tobago figures prominently in the list, probably through the University of the West Indies.

A number of universities in the selected EU markets have branch campuses overseas, with France and UK leading the way with Italy, Netherlands, Spain and Estonia having some presence, though none of these is with the Caribbean.[96] However the evidence on the actual benefits of TNE to the source institution remains unclear.[97]

Skills Shortages – ICT, Engineering, Healthcare – and Employability

Europe faces a stark jobs shortage in the ICT sector as the demand for technical workers grows but skilled graduates reduces, the European Commission (EC) has warned. According to new figures there are 700,000 unfilled ICT jobs across Europe and the number of new openings is set to rise by 3% a year. Meanwhile the number of ICT workers entering the market is shrinking.[98]

In spite of unemployment rates which continue to rise in various EU member states, it's a lack of digital skills rather than job opportunities which is keeping people out of work in the ICT industry. In fact, the number of digital jobs is growing at a rate of 3% per year, which means that it is critical to improve the ICT skill levels of Europe's workforce. The EC said it wants to focus on developing course such as industry-led training, certifying skills, improving school and university curricula and creating an entrepreneur friendly environment for start-ups as ways to proactively tackle the skills shortage.

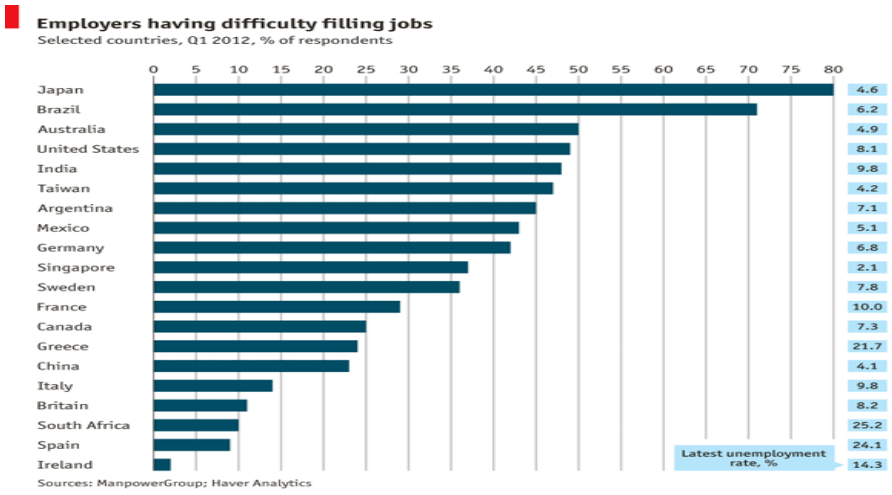
The EC has also launched a new platform called Startup Europe[99] to offer tools and programmes designed to help people wanting to set up and grow web start-ups in Europe. In the UK, the government is developing a new IT teaching curriculum to try and kick start renewed interest in the computer sciences to ensure the UK has a strong digital workforce in the future.

Engineering skills are similarly forecast to be in short supply in Europe moving forward. For example, estimates vary from around 1.25 million science, engineering and technology professionals and technicians are needed by 2020[100] to 2.2 million qualified engineers needed in UK in next 5-10 years[101]; the manufacturing on-shoring renaissance in the US and Europe will

[96] http://www.globalhighered.org/branchcampuses.php. May 2013. NB University of New Orleans has a branch in Jamaica
[97] http://www.timeshighereducation.co.uk/news/transnational-education-brain-drain-warning/2003844.article
[98] Report for the European Commission "Anticipating the Evolution of the Supply and Demand of e-Skills in Europe (2010-2015)" Empirica and IDC Europe, December 2009.
[99] http://ec.europa.eu/digital-agenda/en/startup-europe
[100] http://www.raeng.org.uk/news/publications/list/reports/Jobs_and_Growth.pdf
[101] http://www.engineeringuk.com/_db/_documents/2012_Executive_Summary_and_Conclusions.pdf

further increase demand. A recent survey by Manpower showed that in Germany, France, Italy and the UK, employers are having difficulties filling jobs. [102]

Fig 70: Employers having Difficulties Filling Jobs



Employers continue to argue that Europe's education and training systems are not adapted to companies' skills needs. More generally, the supply of Science, Technology, Engineering and Mathematics (STEM) skills will not match the increasing demand of companies.[103]

Healthcare skills, particularly in medicine, nursing, midwifery are also in short supply as a recent EC survey shows.[104] The EU Skills Panorama website provides detailed country level information on skills shortages in the selected EU markets.[105]

One of the results of these shortages is the growth in the medical tourism field. Ageing global populations, global financial crisis, and long waiting times are further driving the demand for medical tourism, but developed economy incomes remain constrained, thus negatively affecting demand for optional surgeries – treatment delays, increased price competition also play a role. Demand from high growth markets for medical tourism will continue, but those with disposable income are very discerning.[106] A survey by consultancy IPK International has shown that 3-4 per cent of the world's population travels to foreign countries for medical treatment, and as many as 52 per cent of Europeans say they could imagine doing so.[107] Actually doing so, is another thing.

A renewed emphasis on vocational training is increasingly prevalent in certain parts of the EU education market. University Technical Colleges are being set up in the in the UK, in an attempt

[102] http://www.manpowergroup.us/campaigns/talent-shortage-2012/pdf/2012_Talent_Shortage_Survey_Results_US_FINALFINAL.pdf
[103] Educate for Employment Report, 2012 - http://www.businesseurope.eu/Content/default.asp?pageid=568&docid=30149
[104] http://euskillspanorama.ec.europa.eu/docs/EVVR2012Factsheets/08-Bottleneck.pdf
[105] http://euskillspanorama.ec.europa.eu/KeyIndicators/Country/
[106] http://www.imtj.com/articles/2011/medical-tourism-trends/
[107] http://uk.reuters.com/article/2013/03/07/uk-medical-tourism-idUKLNE92601020130307

train more skilled students. Sheffield (creative/ digital and advanced engineering focus)[108] and Liverpool (low carbon and super port focus)[109] are just two cities working on these initiatives.

Manufacturing specific colleges are being set up to address the skills shortages in advanced engineering and manufacturing with applications in sectors like aerospace and marine. An example of this is Fareham College in the UK, which is building the Centre of Excellence for Engineering, Manufacturing and Advanced Skills Training outside the Solent Enterprise Zone.

At the EU level, a recent European Council response to various education initiatives, noted the importance of:-[110]

"promoting excellence in vocational education and training in cooperation with the social partners, for instance by developing quality-assured VET systems with a strong work-based learning component, by considering the development of short-cycle post- secondary or tertiary qualifications, in accordance with the EQF or linked to the first cycle in the context of the Bologna Process, and focused on potential growth areas or areas with skills shortages, and by aligning VET policies with national, regional or local economic development strategies"

And also (linked to ICT provision)

"optimising ICT-supported learning and access to high quality Open Educational Resources (OERs), for instance by supporting ICT-based teaching and assessment practices, by promoting the transparency of rights and obligations of users and producers of digitised content, and by supporting education and training institutions in adapting to the emergence of OERs, with particular regard to quality assurance and monitoring;"

EU 2014-20 and Horizon 2020

Horizon 2020 is the financial instrument implementing the Innovation Union, a Europe 2020 flagship initiative aimed at securing Europe's global competitiveness. Running from 2014 to 2020 with an €80 billion budget, the EU's new programme for research and innovation is part of the drive to create new growth and jobs in Europe.

Horizon 2020 provides major simplification through a single set of rules. It will combine all research and innovation funding currently provided through the Framework Programmes for Research and Technical Development, the innovation related activities of the Competitiveness and Innovation Framework Programme (CIP) and the European Institute of Innovation and Technology.

In 2014, the new seven-year EU Framework Programme for Research and Innovation, Horizon 2020, will start. It is of core importance for realising the Europe 2020 strategy for smart,

[108] http://www.utcsheffield.org.uk/about/
[109] http://www.utcolleges.org/utcs/liverpool-low-carbon-and-superport-utc
[110] http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2013:064:0005:0008:EN:PDF

sustainable and inclusive growth in Europe. Compared with FP7, the Horizon 2020 approach suggested by the Commission will emphasise funding for projects that solve specified societal challenges, as opposed to prescribing the specific research topics to be addressed.

Joint venture opportunities (partnerships etc)

Overall Approach

Increasingly, higher education institutions are viewing themselves and their mission on a global, rather than simply a national, scale - as, indeed, are their students and academic staff. As a result, many are considering entering into an international joint venture (JV) or partnership, whether that may be through validation of courses run abroad, franchising, the establishment of branch campuses or strategic partnerships for research.[111]

Below, we present a summary of the main benefits and risks associated with education joint ventures.[112] Potential benefits are: -

- **Research –** International partnerships are often designed to leverage research capabilities from one or more HEIs, carrying the potential for prestigious intellectual and practical advances, as well as attracting world-class students, researchers and academics to the institutions themselves.

- **Reputation –** Establishing an international joint venture can, if managed well, expand the power of the HEI's brand, so attracting a higher class of student and academic and expanding access to funding.

- **Opportunities** – Students and academics are increasingly aware of the need for an international outlook, and so are demanding the same from their HEIs. The very best may not settle for operating in one country, but may seek to work with institutions that have a global reach and outlook comparable to their own.

- **Revenue** – Whilst often not the primary motivating factor for international JVs, several of the models available carry the potential to accrue substantial revenues from overseas. In a time of cuts and a static domestic market, few HEIs can afford to ignore an extra source of income

On the other hand, joint venturing in the sector does carry a number of risks as well: -

- **Reputation –** How well do you know your partner institution? The importance of undertaking thorough due diligence in relation to the partner (concentrating particularly on their financial systems, management and governance structure) cannot be

[111] Liz Brassington, Pennington's Solicitors. Sourced from http://www.lexology.com/library/detail.aspx?g=2dd88bc6-a3f4-484b-8f24-8afe2cca08db
[112] ibid

overestimated. Remember that, however well drafted your legal agreement, ultimately it is the partner institution that is likely to have day-to-day control over the venture. If anything goes wrong, both your investment and your reputation could be on the line.

- **Foreign regulation** – Do not assume that other jurisdictions operate under the same rules as the Caribbean. Before signing any kind of binding agreement it is worth finding out as much as possible about the regulatory environment in the host country. For instance, some jurisdictions do not allow you to sue a public body even if it fails to comply with its obligations. Have you considered the tax and immigration regime that applies, whether that be to students, staff on secondment, or the JV itself?

- **Caribbean regulation** – Despite the JV taking place almost wholly overseas, Caribbean regulation may still apply. In particular, funding councils and QAA jurisdiction should be considered, and any relevant regulation complied with carefully. It will also be important to ensure that your partner institution is aware of the applicability of any Caribbean requirements, to avoid any misunderstandings in the future.

- **Financing** – International JVs, particularly the establishment of branch campuses and research collaborations, can be expensive. Advisory service HE Global recommends that both the overseas and the Caribbean institution enter into collaborations on the assumption that there will be some shared financial risk.

- **MOUs** – Don't assume that signing a "heads of terms" or "memorandum of understanding" does not create binding legal obligations. To avoid difficulties later on, ensure that the agreement clearly states that it will not be legally binding, and that it is subject to English law. Remember that other countries may have different rules about such documents, and so never sign anything unless you are confident that you know whether it will bind you.

- **Governing law** – It is vital that any agreements state clearly which law is to apply. The risk is that both parties try to assert their own interpretation, leading to lengthy and costly cross-border legal disputes.

- **Intellectual property** – In research collaborations in particular, consider carefully who will own any intellectual property developed by the JV, and ensure this is clearly documented and agreed. Local laws will also need to be considered, as some will apply automatically.

- **Disputes** – A clearly defined dispute resolution procedure can help to avoid costly, and potentially embarrassing, disagreements being played out on the world stage.

- **Exits** – If the JV is not working, it will be vital to ensure that you are able to exit cleanly and without rancour. A mutually agreeable exit procedure should be agreed upon at the outset in order to manage the risk of the venture.

"Once all the difficult questions have been asked and answered, HEIs should ask themselves whether they emerge with a picture that fits with their institution's brand, reputation and international strategy. Are there any legal or regulatory risks that merit further investigation? Whilst there is no shame in walking away, many institutions will be asking themselves whether they can be left behind in the race for international influence and expansion. For those that decide to embark on international JVs the risks may be great, but with proper due diligence and planning most are able to share in the benefits of an exciting new era in the HE sector."[113]

An initial consideration should be what types of potential partnerships could involve Caribbean and EU organisations. Many EU educational establishments are internationalising their education offer, and this goes beyond simply just attracting students from international markets i.e. Mode 2. Caribbean providers will need to consider all possible options in terms of delivery, marketing, exchanges etc for effectively engaging with select EU organisations.

It would be interesting to map out the current partnerships/links between the main educational establishments in the Caribbean region that have international ambitions and partners in the selected EU countries, in order to try and see what value is derived from those existing connections. For example, UWI has stated partnerships with several institutions in UK, France, and Spain (though considerably fewer than with the US and Canada).[114] How are they supported, what type of exchange takes place etc.

It may well be that existing connections can provide an under-utilised source of new business opportunities, or it may be that certain ones are effectively inactive. A key question would be whether significant institutional capital has been invested in the connection (i.e. at Pro Vice Chancellor level or equivalent), and moving forward whether this will be the case.

In the UK, Sheffield University and London University have international programmes with the Caribbean.[115]

Partnerships could be sought out in all the key areas where the Caribbean has something special or unique to offer and complement EU providers. Some of the big thematic areas in the EU include things like Smart/Future Cities, Food Sustainability and Security, Biodiversity, Cyber Security, Big Data/Analytics, Wireless and Sensor Technology, Internet of Things, Environmental and Cleantech Technologies.

Joint venture opportunities and partnerships in the delivery of education are increasingly important both in the delivery and the marketing of courses as education becomes increasingly internationalised. The earlier section on new business models highlighted how digital delivery is transforming the global education market with organisations such as Futurelearn in the UK.

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[113] ibid
[114] http://www.cavehill.uwi.edu/international/current/documents/PARTNERINSTITUTIONS.pdf
115 http://www.shef.ac.uk/education/courses/international/caribbean/eddcaribbean
http://www.londoninternational.ac.uk/sites/default/files/caribbean_exhib_leaflet.pdf

Caribbean establishments like UWI Open, which has recently received funding from Canadian International Development Organisation (CIDA), might be well placed to look to develop new partnership arrangements with the selected EU markets.

"The UWI Open Campus offers programmes in multi-mode methodologies, including online and face-to-face modalities. Online programmes can be made available to anyone who has access to a computer and the Internet or through any of the physical site locations across the Caribbean region. There are currently 42 site locations, serving 16 countries in the English-speaking Caribbean." [116]These 'multi-mode methodologies' open up the prospect for new partnership arrangements with the EU.

The growth in transnational education will also offer the possibility for Caribbean countries to partner with European providers not only in delivery, but also in the marketing and commercial development space. The UK is leading the way in this area within Europe, and this provides a particularly good fit for Caribbean countries with a competitive and quality education offer.

An example of joint ventures with a channel partner between Universities and the private sector for marketing purposes to enhance routes to market whilst retaining control over programme delivery and content is INTO.[117]

Case Study: INTO

"Since 2006, INTO has successfully launched 17 joint venture partnerships with 18 leading universities in the United Kingdom, North America and China. Initially focused on on-campus pathway provision, our model is fast evolving to meet the demands of the growing, and increasingly mobile global student population.

INTO University Partnerships was established in 2005 at the invitation of the University of East Anglia (UEA). Seeking to address underperformance in international student recruitment, but uncomforFigure with the principle of outsourcing the delivery of English language and pathway programmes, the University worked with INTO to develop an innovative public/private partnership structure. INTO UEA was created, and for the last number of years has facilitated major investment, expansion and enhanced services for international students at the University. This modus operandi has underpinned the success of further partnerships with leading universities in the UK, USA, and China.

INTO may adapt partnership structures to address the legal and accreditation requirements of a given university. However, central to every INTO partnership is the notion that the university retains control over the quality of the academic experience and ensures high quality and consistent support services for students. In return, the university enjoys the benefits of working

[116] http://www.open.uwi.edu/news/cida-support-uwi-open-campus-0
[117] http://www.into-corporate.com/en-gb/home.aspx

with a strong private sector partner which supports it in transformative internationalisation and student recruitment projects."

The case of a Malaysian private medical school which has expanded into Europe, via the UK, exemplifies what might be possible with the right partners.[118]

A private medical school in Malaysia, Allianze University College of Medical Sciences (AUCMS), is to expand to Europe with the purchase of a major university site in London. The 32-hectare park and buildings, which previously housed Middlesex University's Trent Park campus, attracted international attention when it was acquired by AUCMS for £30 million (US$46.5 million) this year.

It was put up for sale last year after Middlesex University moved all its operations to a single site in Hendon, North London. The site comes complete with a lake and nine buildings, including student accommodation, dining halls and lecture theatres.

A further £10 million to £20 million is expected to be spent on renovations – a historic protected building, Mansion House, sits on the site. But some facilities need little work, with amenities and equipment already in place. 300 students are expected to be on campus by October.

AUCMS, based in Penang, has five specialist medical schools and around 3,500 students. It has also been expanding into business studies, accounting and hospitality. While it aims to secure accreditation as a British university in order to be able to enrol British students, for the time being existing AUCMS students from Malaysia will spend time there.

In August, a UK private non-profit institution, the University of Buckingham, became the first private university in the country to be authorised to offer medical degrees. It will be allowed to exceed strict quotas imposed on public universities by the authorities in England on the number of international students who may be enrolled for medical degrees.

For a private university to grant medical degrees in the UK is an uphill struggle. The General Medical Council, or GMC, must still approve the University of Buckingham course which, according to reports from London, is likely to adopt an Australian curriculum. The UK government has also tightened its system of accrediting overseas institutions wanting to set up in England.

Massive Open Online Courses (MOOCs)

The growth of MOOCs highlighted earlier offers another option for Caribbean based institutions to partner with innovative European organisations. An example of this is the German based

[118] http://www.universityworldnews.com/article.php?story=20130830115148971

company Iversity, which is a platform provider for MOOCs. Iversity will be open to hosting MOOCs submitted by professors or institutions from anywhere in the world, though operating from a continental European base gives it an obvious first focus on Europe. [119] Iversity is looking at three likely business models:

- certification fees for students — coming to iversity in 2014
- licensing fees — where physical universities pay iversity to license courses to replace some of the classes they conduct (likely for introductory courses, freeing the university's staff up for more in-depth teaching)
- recruiting fees — generated by providing a "recruiting intelligence" service to employers based on students' performance in relevant classes

An event in Brussels in October organised by the Academic cooperation Association could provide an opportunity for interested parties to find out more about what is going on in Europe in this field, and meet potential partners.[120]

One point to note on partnerships is for Caribbean providers to be aware that much of European education internationalisation is focused on the high growth markets in Asia, and thus it will be even more important for Caribbean providers to have well thought out business cases in order to gain a fair share of European provider's attention.

The jury on MOOCs is out with some questioning the quality of provision and the outcomes obtained compared to more traditional teaching methods.[121]

[119] Coursera and other U.S. MOOCs platforms are open to courses from institutions outside the U.S. Coursera already counts several European and international institutions among its 62 university partners
[120] http://www.aca-secretariat.be/index.php?id=674
[121] http://www.universityworldnews.com/article.php?story=20130816164129431

Conclusion and Recommendations

The tertiary education sector is extremely competitive globally. Universities recognize the value of attracting foreign students, not only for the higher fees that they can attract but also for the value they can bring to the academics and the diversity of the campus experience. Many foreign students also remain in the country (primarily the developed ones) after graduation and contribute to the economic growth of the adopted country. In this race, the Caribbean cannot compete in all areas. The CARIFORUM must ask itself where its overall advantage lies in trading with Europe. It may very well be, upon closer examination that the offer of the Caribbean, linked so closely with North America, is not as attractive a proposition for prospective customers from Europe as it may be for customers from other parts of the world.

This report though has identified a number of opportunities with respect to Europe: -

- High Costs in some European countries
- New Business Models in Education
- EU Student Mobility Overseas
- Internationalisation - Growth in Transnational Education
- Skills Shortages and Employability (Vocational Training)
- EU 2014-20 and Horizon 2020.

We have shown that the commitments of Europe in the context of the Economic Partnership Agreement are not likely to act as constraining factors to a proposed expansion of trading in education services. But there is need to refine the offer available to prospective customers and address supply constraints in the Caribbean.

Improving the services statistics available in the region can also enhance exporting of education services. Collecting education services statistics was very challenging and should be improved if the case for new investment in the sector to promote new services trading is to be made. This point also is valid, of course, for other services sectors as well. As the information now stands, it would appear that Europe, primarily the UK benefits more from programme mobility (Mode 1) and there certainly are larger numbers of students from the Caribbean in Europe than vice versa (Mode 2). Institutional mobility (Mode 3) both ways is, from available statistics, practically non existent. Data on staff mobility (Mode 4) is largely unavailable.

Can CARIFORUM compete on price for certain types of education such as medical and engineering to take advantage of gaps in external market offerings or high demand? The situation appears not to be uniform but certain higher priced markets in Europe might be targeted.

The many medical schools in the region seem to provide a decent base on which to build a deeper exporting capacity. However, there are certain challenges. Most of the schools are small. Not all of them are accredited. It has to also be said that not all also are deemed to enjoy

the best reputation. They are all private institutions and a number of them maintain few linkages with the host Governments. And finally, their focus has been on attracting the student from the United States, not Europe.

On the other hand, In some courses of study and with respect to certain European countries they may indeed have cost advantages. But the current North American focus will have to change if significant numbers of new customers from Europe are to be attracted. In

Similarly, linkages are strong with North America in terms of the clinical aspects of medical education and a much greater emphasis has been placed on achieving acceptance from accreditation organizations in North America than in Europe. Indeed, our research has shown that the vast majority of the medical schools have only minimal linkages with Europe and we found only one with a joint programme offering. Certainly these institutional linkages should be expanded as a means of facilitating new services exporting. In this regard, the option would be to seek to expand the numbers of Europeans in the student base.

There may be scope for extending the coverage to include more training for the nursing profession. The interest in nurses from the Caribbean is well known and elsewhere documented. The University of the West Indies has recently launched a degree programme in Nursing and other institutions such as COSTATT offer similar training. At present, we found that only one of the offshore medical schools offer nursing. Expansion of this offering would meet an ongoing demand in both regions for qualified nurses and in this case the prospective customer base would be nationals of the Caribbean.

These ideas related to medical education have to be reviewed in consultation with the overseas medical schools in the Caribbean. As these are commercial entities though, there would be a need to make a suitable business case to these institutions, not one of a broad development or specific trading dimension. This may be best done at the national level, rather than from a regional perspective even as the process continues toward the development of a CARICOM regional services strategy. National entities would presumably have to be willing to consider additional benefits to promote additional investment in facilities and marketing. Marketing support might also be provided to medical schools interested in refreshing their offer to the European consumer perhaps in exchange for more of projected new earnings being retained within the national economy.

We have also noted the needs of the engineering sector within Europe. It is known that such shortages also exist within the Caribbean. Providing more opportunities for students from Europe and the Caribbean in this area would therefore seem to be an interesting option to consider. At the same time, the largest capacity for such training in the region is the University of the West Indies where it is understood that efforts are underway to address the shortcomings perceived by extra-regional institutions in programme length offered. There may be opportunities for seeking to expand engineering education through foreign investment in the sector, as the Government of St. Kitts and Nevis seems interested in doing.

The primary area of delivery of these services has been and seemingly will continue to be through Mode 2 (student mobility). We have noted the various flexible delivery methods being undertaken in Europe and elsewhere. It does appear that there is a huge opportunity for enhancing the technological capacities of tertiary institutions in the region to support delivery of new course offerings to promote Mode 1 services trade. Here action by institutions in developing appropriate offerings must go hand-in-hand with actions by Member States, particularly in the CARICOM, to significantly reduce the still relatively high cost of telecommunication services and improve the bandwidth available to services providers in the region.

This report has noted that opportunities may exist for joint ventures. We have pointed out some of the risks and opportunities from joint venturing in education. Institutions in the region need to reexamine their existing partnerships and seek to determine how these could be expanded and new ones created to enhance visibility within Europe and through that greater services exporting.

Upgrading the accreditation structure regionally can only enhance the status of the services in the education sector provided from the CARIFORUM region. Again, this has been elsewhere suggested. Recent years have seen the expansion of national accreditation structures in a number of CARIFORUM countries and this process should continue bearing in mind resource restraints, particularly of the smaller members of the CARIFORUM. However, a regional accreditation institution is definitely required.

Recommendations

In moving forward, for there to be increasing exports of education services from the CARIFORUM region to these selected countries in the European Union action is required both of Governments (including regional institutions) and educational institutions themselves.

The governmental authorities in the region should consider inter alia the following: -

1. Finalize a regional accreditation body within CARiCOM – This overarching body could have sub-institutions with particular focus on areas such as medicine. It is in the interest of Governments to ensure accreditation of the institutions that operate within their borders.
2. Enhance national visibility within European markets – Foreign Governments successfully mount education fairs in the Caribbean to promote their service offerings to prospective customers. It is time for CARIFORUM to consider doing the same. Initially the target should be higher cost markets within Europe.
3. Establish means of consultation with offshore medical schools on new trading possibilities – The OECS should consider doing this as a sub-regional initiative as this would likely prove to be more effective than individual national approaches.
4. invest in statistical agencies to better collate services trade statistics – Relevant for all services trade, this would aid the decision-making of institutions and governments alike.

5. Support enhancement of the educational plant within their territories – This relates to quality enhancements and considering new services offerings.
6. Reduce the high cost of telecommunications to facilitate Mode 1 trade – This would provide an incentive to institutions to make their own investments in technology to introduce new instructional and delivery methods.
7. Encourage more interaction between educational institutions within CARIFORUM – While those in the UWI family interact well, the private medical institutions do not seem to collaborate effectively. This could be because there is such a high degree of competition for the North American student market. With more focus on a largely untapped market such as Europe, there may be added incentive to and benefit from cooperation.

Educational institutions should inter alia: -

1. Identify trading opportunities in Europe – There is little evidence that any significant focus has been placed on Europe.
2. Review and enhance programme offerings – There may be scope to offer more offerings in the nursing field and in engineering given shortages that have emerged in this field.
3. Consider new joint venture arrangements with European institutions – Specific linkages could be sought to offer either entire programmes of study or specific modules to students from Europe who would be attracted to learning within the Caribbean.
4. Enhance marketing among prospective customers in Europe, including through improving their web presence – The web presence of in particular the medical schools in the Caribbean are focused on the United States. While some school sites are up to date, more lack comprehensive information and few reach out to the prospective European customer. Linking with Governments on specific marketing initiatives in Europe would be desirable.
5. Ensure accreditation with CAAM-HP for medical schools and with other globally accepted accreditation institutions for non-medical schools – The importance of accreditation cannot be overstated.
6. Improve their capacity to offer courses of study via flexible delivery methods – Online delivery of education services is set to grow in the coming years. Tertiary institutions in the region need to develop specific strategies to meet the emerging market demand, in the developed markets of Europe and in the developing markets of Africa and Asia.

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Idea 1: 'Education Caribbean'

Development of a specific agency, or sub group to target education in European markets. There needs to be a pan-Caribbean Agency to co-ordinate the different offers and specifically to promote Caribbean education abroad under the banner 'stronger together' (or similar). The role of this organization would be similar to that of Education UK[122], which has a remit to promote UK education to international students. This could be responsible for developing an internationalisation strategy, as has been developed in UK.

[122] http://www.educationuk.org/global/

Activities would include

1. Developing a new website to promote pan-Caribbean education offering
2. Promoting Caribbean education in key target European markets with key stakeholders
3. Developing a 3-5 year European strategy and action plan
4. Implementing the plan

Idea 2. Caribbean Education Quest/Catalyst – New Business Models

MOOCS represent a low cost way to attract students (in Europe), especially niche on line (free) courses in interesting areas, which are relevant and highly distinctive to Caribbean markets – eg, primate studies in St. Kitts and Nevis, tropical architecture, specialist agriculture, tourism. These could be a good way to gain wider exposure, improve brand recognition and draw students in to wider (fee paying) studies. A partnership with some of the US or European providers such as Coursera, Khan Academy or Futurelearn should be considered as a way to gain market access and text the water.

A learning journey to UK/Europe to look at new business models and collaborations, especially around MOOCs should be planned. This could be linked to a visit to UK education fairs such as, for example, The Higher Education Show in October. This would involve a few Caribbean education and technology providers, and would involve:-

- Visit to organisations such as Futurelearn and participating universities – as well as other organization identified in the research.
- Visit to the key educational fair
- Matchmaking with potential partners
- Visit to 2 or 3 leading providers (HEIs or private sector) in the education space to learn from good practice

Appendices

Appendix One: Modes as applied to Education Services

In the context of higher education, the GATS categories can be broadly interpreted as:

1. Mode 1 — **Programme mobility:** universities supplying educational services across borders directly to students in their home countries, via distance-learning. 'Under this mode, there is no physical movement of the sellers or consumers, but the service itself travels' (Tilak, 2011). Historically, distance-learning was carried out using correspondence courses (eg, the University of London, which has been providing international distance learning degrees since 1858). Since the advent of the internet in the early 1990s, correspondence, textbook-based courses have been steadily replaced by on-line provision. In pure Mode 1 provision, the university has no physical presence in the country of the student. The recent growth of Massive Open On-line Courses (MOOCs) exemplifies Mode 1 provision, in which anyone with an internet connection can enrol in an on-line course at a major US university.

2. Mode 2 — **Student mobility:** students consuming the education services by moving to the country of the university. Over the last two decades, international student mobility has been the dominant form of transnational education. Over 3m students study on the campus of a foreign university and such 'export education' is a major service of invisible export earnings for countries like Australia, New Zealand and the UK.

3. Mode 3 — **Institutional mobility:** universities supplying educational services to students in their home countries through an in-country service provider. This in-country presence may range from a local college, which offers a university's degrees on a franchised or validated basis (see below), to the university establishing an international branch campus (IBC) to teach students in a foreign market. The University of Nottingham, with IBCs in Kuala Lumpur (University of Nottingham Malaysia) and Ningbo (University of Nottingham Ningbo), provides one of the best-known examples of Mode 3 provision, but there are hundreds of smaller operations across China, Malaysia, Singapore and Hong Kong.

4. Mode 4 — **Staff mobility:** universities sending staff abroad for short periods to deliver education services to students in their home countries. This form of mobility, known as fly-in fly-out (FIFO) in industries like mining where it is commonplace, involves staff going to the students, but unlike Mode 3, the staff may be away from their own universities for short periods from a few days to a couple of weeks and the universities have no permanent physical presence in-country, often using rented space in a hotel or partner university.

Appendix Two: Useful Websites Education

COUNTRY	Trade	Inward Investment	Ministries and Misc Organisations
Netherlands	Holland Trade – www.hollandtrade.com	Netherlands Foreign Investment Agency - http://www.nfia.co.uk/	Ministerie van Onderwijs, Cultuur en Wetenschap (Ministry of Education, Culture and Science) - http://www.rijksoverheid.nl/ministeries/ocw
Germany	Germany Trade & Invest - http://www.gtai.de/GTAI/Navigation/EN/trade.html	Germany Trade and Invest - http://www.gtai.de/GTAI/Navigation/EN/invest.html	BMBF - Bundesministerium für Bildung und Forschung (Federal Ministry of Education and Research) - http://www.bmbf.de/en/index.php Kultus-und Wissenschaftsministerien der Länder (Ministries of Education of the Länder in the Federal Republic of Germany) - http://www.kmk.org/ Goethe Institute: http://www.goethe.de/uun/enindex.htm
United Kingdom	UK Trade & Investment http://www.ukti.gov.uk/pt_pt/home.html Education Specific - http://www.ukti.gov.uk/pt_pt/export/sectors/educationtraining.html?null	UK Trade & Investment - http://www.ukti.gov.uk/pt_PT/investintheuk/sectoropportunities/ict.html	DfES –Department for Children, Schools and Families, England - http://www.education.gov.uk/ DELNI - Department for Employment and Learning for Northern Ireland - http://www.delni.gov.uk/ DE - Department of Education, Northern Ireland - http://www.deni.gov.uk/ Scottish Government on Education and Training - http://www.scotland.gov.uk/Topics/Education Welsh Assembly Government's Department education and skills - http://new.wales.gov.uk/topics/educationandskills/?lang=en CIHE – Council for Industry and Higher Education – www.cihe.co.uk INTO - http://www.into-corporate.com/en-GB/home.aspx British Council - http://www.britishcouncil.org/ National Centre for Universities and Business – www.ncub.co.uk UK HE International - http://www.international.ac.uk/
France	Ubifrance – www.ubifrance.com	Invest in France - http://www.invest-in-france.org	Ministère de l'Éducation Nationale, de la Jeunesse et de la Vie associative - http://www.education.gouv.fr/ Ministère de l'Enseignement supérieur et de la Recherche - http://www.enseignementsup-recherche.gouv.fr/ Campus France - http://www.campusfrance.org/en/resource/campusfrance-national-agency-promotion-french-higher-education-abroad
Estonia		Invest in Estonia – www.investinestonia.com	Ministry of Education and Research - http://www.hm.ee/?1 Laws and regulations - http://www.hm.ee/index.php?148583 Estonian ENIC/NARIC, a national centre on the academic and professional recognition of the qualifications; information on the credit transfer system and evaluation of credits and study periods. http://www2.archimedes.ee/enic/ Estonian Youth Work Centre http://www.entk.ee/index.php?id=13&keel=eng Estonian Education Forum http://www.haridusfoorum.ee/index.php?page=English Estonian Non-Formal Adult Education Association http://www.vabaharidus.ee/index.php?page=3 National Resource Centre for Guidance - http://www.innove.ee/en/?p=2&op=prog&ID=7 E-riik, administrative information about state institutions, political system, servers of Estonian counties etc. https://www.eesti.ee/eng/
Spain	Mainly done via Spanish regions	Invest in Spain – www.investinspain.org	MEC - Ministerio de Educación y Ciencia (Ministry of Education and Science) - http://www.mecd.gob.es/portada-mecd/

Italy	Via Italian regions	Invitalia – www.invitalia.com	MIUR - Ministero dell'Instruzione, dell' Università e della Ricerca (Ministry of Education, Universities and Research) - http://www.istruzione.it/
Malta	Mata Enterprise - http://www.maltaenterprise.com/en/business/assistance/gateway-to-export	Malta Enterprise - http://www.maltaenterprise.com/en/foreign-investors	Gvern Ta' Malta (Government of Malta) Ministry of Education, Employment and the Family - http://www.gov.mt/en/Pages/gov.mt%20homepage.aspx
EUROPE			**Eurypedia** – European Encylopedia on European national Education Systems https://webgate.ec.europa.eu/fpfis/mwikis/eurydice/index.php?title=Home

Appendix Three: Sectoral Value Added as a Share (%) of GDP[123]

COUNTRY	Agriculture	Non Manufacturing Industry	Manufacturing Industry	Services
Netherlands	2	13	11	74
Germany	1	19	7	73
United Kingdom	1	11	10	78
France	2	11	8	79
Estonia	3	17	12	68
Spain	3	13	3	71
Italy	2	16	9	73
Malta	2	14	19	65

[123] World Economic Forum, Global Competitive Index, 2012-13

Appendix Four: Bibliography

Websites

- Financial Times - www.ft.com
- Wikipedia - www.wikipedia.com
- World Economic Forum - www.weforum.org
- Eurostat (EU statistics) - http://epp.eurostat.ec.europa.eu/statistics_explained/index.php/Tertiary_education_statistics
- Unesco Institute for Statistics - http://www.uis.unesco.org/Pages/default.aspx
- European Union – www.europa.eu
- Apple – www.apple.com
- Coursera – www.coursera.org
- Udacity – www.udacity.com
- MIT Open Courseware - http://ocw.mit.edu/index.htm
- BBC – www.bbc.co.uk
- American Medical News – www.amednwes.com
- Foundation for Advancement of International Medical Education and Research – www.faimer.org
- World Bank – www.data.worldbank.org
- Resource Group – www.resource-group.com
- Study in Europe – www.studyineurope.eu
- McKinsey – www.mckinsey.com
- UK Educational Services in the Caribbean – www.ukesc.co.uk
- Techcrunch – www.techcrunch.com
- Iversity – www.iversity.org
- Guardian – www.guardian.co.uk/higher-education
- Futurelearn – www.futurelearn.com
- Independent – www.independent.co.uk
- Higher Education Statistics Agency (UK) – www.hesa.ac.uk
- Observatory on Borderless Higher Education (OBHE) – www.obhe.ac.uk
- Global Higher Education – www.globalhighered.org
- Times Higher Education – www.timeshighereducation.co.uk
- Engineering UK – www.engineeringuk.com
- Manpower Group – www.manpowergroup.com
- Royal Academy of Engineering – www.raeng.org
- Business Europe – www.businesseurope.com
- EU Skills Panorama – www.euskillspanorama.ec.europa.eu

- Reuters – www.reuters.com
- UTC Sheffield – www.utcsheffield.org.uk
- UT Colleges (Liverpool) – www.utcolleges.org.uk
- European Law – www.eur-lex.europa.eu
- Lexology – www.lexology.com
- University of West Indies Cavehill – www.cavehill.uwi.edu
- London International – www.londoninternational.ac.uk
- Sheffield University – www.shef.ac.uk
- INTO – www.into-corporate.com
- The Economist – www.economist.com
- Common Sense Advisory – www.commonsenseadvisory.com
- Doing Business – www.doingbusiness.org
- International Chamber of Commerce – www.iccwbo.org
- VATLive – www.vatlive.com
- KPMG – www.kpmg.com
-
- American University of Antigua College of Medicine - www.auamed.org
- American University of Barbados School of Medicine - www.aubmed.org
- All American Institute of Medical Sciences - www.aaims.edu.jm
- Ross University - www.rossu.edu
- DeVry Inc - www.devryinc.com
- The University of the West Indies - www.uwi.edu
- University of Belize - www.ub.edu.bz
- St. George's University - www.sgu.edu
- University of Health Sciences Antigua - www.uhsa.ag
- Galen University - www.galen.edu.bz
- Windsor University - www.windsor.edu
- CAAM-HP - www.caam-hp.org
- Association of Caribbean Tertiary Institutions - www.acticarib.org
- College of the Bahamas - www.cob.edu.bs
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- The St. Kitts and Nevis Accreditation Board - www.ab.gov.kn
- Barbados Accreditation Council - www.bac.gov.bb
- Accreditation Council of Trinidad and Tobago - www.actt.org.tt
- The University Council of Jamaica - www.ucj.org.jm
- Ministry of Education, Jamaica - www.moe.gov.jm
- Ministry of Education, Science, Technology and Innovation - www.mes.gov.bb
- Caribbean Tourism Organisation - www.onecaribbean.org

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- OECD's Education at a Glance, 2012 (OECD Indicators)
- Definitions and Estimates of the Size and Shape of UK Transnational Education, April 2013, Nigel Healey, Nottingham Trent University
- International Higher Education Facts and Figures, Winter 2012-13, UK Higher Education International Unit
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- Europe (2010-2015)
- Educate from Employment Report, 2012
- The World's Business Cultures and How to Unlock Them, Tomalin and Nicks
- Doing Business in the EU, 2012
- The University of the West Indies, St. Augustine - Student Statistics 2012/13
- The University of the West Indies Strategic Plan 2012-2017
- Plan Decenal de Educacion Superior, Dominican Republic
- Encuesta sobre Gastos de Estudiantes Extranjero in la República Dominicana, 2012
- Ministry of Education, HRD and Labour: Education Statistical Digest 2011/2012
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- Miniature Digest of Education Statistics, Barbados
- Annual Report 2011/2012, University of the West Indies
- Annual Report of the TTCSI, 2012-13
- Draft National Strategy for Export of Education Services, 2012
- Prinicpal's Report 2011/12, University of the West Indies, Mona.

Appendix 5; EPA Commitments of the European Union

Commercial Presence

10. EDUCATIONAL SERVICES (only privately funded services)	
A. Primary Education Services (CPC 921) B. Secondary Education Services (CPC 922) C. Higher Education Services (CPC 923) D. Adult Education Services (CPC 924)	EC: Participation of private operators in the education network is subject to concession AT: Unbound for higher education services. Unbound for education services for adults by means of radio or television broadcasting BG: Unbound for the supply of primary and/or secondary education services by foreign natural persons and associations and for the supply of higher education services CZ, SK: Nationality condition for majority of members of the Board. Unbound for the supply of higher education services except for post-secondary technical and vocational education services (CPC 92310). CY, FI, MT, RO, SE: Unbound EL: Nationality condition for majority of members of the Board in primary and secondary schools. Unbound for higher education institutions granting recognised States diplomas ES, IT: Needs test for opening private universities authorised to issue recognised diplomas or degrees; procedure involves an advice of the Parliament. Main criteria: population and density of existing establishments HU, SK: The number of schools being established may be limited by local authorities (or in the case of high schools and other higher education institutions by central authorities) in charge of granting licenses LV: Unbound for the supply of education services relating to technical and vocational secondary school-type education services for handicapped students (CPC 9224) SI: Unbound for primary schools. Nationality condition for majority of members of the Board in secondary and high schools
E. Other education services (CPC 929)	AT, BE, BG, CY, DE, DK, ES, EE, FI, FR, EL, HU, IE, IT, LV, LT, LU, MT, NL, PL, PT, RO, SI, SE, UK: Unbound CZ, SK: Participation of private operators in the education network is subject to concession. Nationality condition for majority of members of the

Sector or sub-sector	Description of reservations
5. EDUCATIONAL SERVICES (only privately-funded services)	
A. Primary Education Services (CPC 921)	For Mode 1 BG, CY, FI, FR, IT, MT, RO, SE, SI: Unbound For Mode 2 CY, FI, MT, RO, SE, SI: Unbound
B. Secondary Education Services (CPC 922)	For Mode 1 BG, CY, FI, FR, IT, MT, RO, SE: Unbound For Mode 2 CY, FI, MT, RO, SE: Unbound For Modes 1 and 2 LV: Unbound for education services relating to technical and vocational secondary school-type education services for handicapped students (CPC 9224)
C. Higher Education Services (CPC 923)	For Mode 1 AT, BG, CY, FI, FR, IT, MT, RO, SE: Unbound For Mode 2 AT, BG, CY, FI, MT, RO, SE: Unbound For Modes 1 and 2 CZ, SK: Unbound for higher education services, except post-secondary technical and vocational education services (CPC 92310)
D. Adult Education Services (CPC 924)	For Modes 1 and 2 AT: Unbound for adult education services by means of radio or television broadcasting. CY, FI, MT, RO, SE: Unbound.
E. Other education services (CPC 929)	For Modes 1 and 2 AT, BE, BG, CY, DE, DK, ES, EE, FI, FR, EL, HU, IE, IT, LV, LT, LU, MT, NL, PL, PT, RO, SI, SE, UK: Unbound.

Key Personnel and Graduate Trainees

10. EDUCATIONAL SERVICES (only privately funded services)	
A. Primary Education Services (CPC 921)	FR: Condition of nationality. However, third country nationals may obtain authorisation from competent authorities to establish and direct an education institution and to teach IT: Condition of nationality for service providers who are authorised to issue State-recognized diplomas EL: condition of nationality for teachers
B. Secondary Education Services (CPC 922)	FR: Condition of nationality. However, third country nationals may obtain authorisation from competent authorities to establish and direct an education institution and to teach. IT: Condition of nationality for service providers who are authorised to issue State-recognized diplomas. EL: Condition of nationality for teachers. LV: Condition of nationality for technical and vocational secondary school-type education services for handicapped students (CPC 9224)
C. Higher Education Services (CPC 923)	FR: Condition of nationality. However, third country nationals may obtain authorisation from competent authorities to establish and direct an education institution and to teach. CZ, SK: Condition of nationality for higher education services, except for post-secondary technical and vocational education services (CPC 92310). IT: Condition of nationality for service providers who are authorised to issue State-recognized diplomas. DK: Condition of nationality for professors.

Contractual Services Suppliers and Independent Professionals

Higher Education Services (only privately-funded services) (CPC 923)	AT, BE, BG, CY, CZ, DE, DK, EE, EL, ES, FI, HU, IE, IT, LT, LV, MT, NL, PL, PT, RO, SK, SI, SE, UK: Unbound. FR, LU: Only for university professors. FR: The professors must have obtained an employment contract from a university or other higher education institution. Economic needs test, unless those professors are designated directly by the Minister in charge of higher education. The work permit is delivered for a period not exceeding nine months renewable for the duration of the contract. The recruiting institution must pay a tax to the International Migration Office.

Appendix 6: EPA Commitments of CARIFORUM

5. EDUCATIONAL SERVICES		
A. PRIMARY EDUCATION SERVICES (CPC 921) (Except non-profit, public and publicly funded entities)		
DMA, GUY, JAM, SUR	DMA: 1) Unbound; 2) None; 3) None from 1 January 2022	DMA: 1) Unbound; 2) None; 3) None from 1 January 2022
	GUY, JAM, SUR: 1), 2) None	JAM: 1), 2), 3) None, except as indicated in the horizontal commitments
		GUY, SUR: 1), 2) None
	JAM, GUY: 3) None SUR: 3) Unbound	GUY: 3) None SUR: 3) Unbound
	DMA, GUY, JAM, SUR: 4) Unbound except as indicated in the horizontal commitments	DMA, GUY, JAM, SUR: 4) Unbound except as indicated in the horizontal commitments
B. SECONDARY EDUCATION SERVICES (CPC 922) (Except non-profit, public and publicly funded entities)		
DMA, GUY, JAM, LCA, SUR	DMA: 1) Unbound; 2) None; 3) None from 1 January 2022	DMA: 1) Unbound; 2) None; 3) None from 1 January 2022
	GUY, JAM, LCA, SUR: 1), 2) None	JAM: 1), 2), 3) None, except as indicated in the horizontal commitments
		GUY, LCA, SUR: 1), 2) None
	GUY, JAM: 3) None	GUY: 3) None
	LCA, SUR: 3) Unbound	LCA, SUR: 3) Unbound
	DMA, GUY, JAM, LCA, SUR: 4) Unbound except as indicated in the horizontal commitments	DMA, GUY, JAM, LCA, SUR: 4) Unbound except as indicated in the horizontal commitments

C. HIGHER EDUCATION SERVICES (CPC 923) (except non-profit, public and publicly funded entities)		
DOM (CPC 923) ATG, GRD, GUY, JAM, LCA, SUR, VCT DMA (CPC 92310) TTO (CPC 92310, 92390)	DOM: 1), 2) None; 3) Joint Venture required; 4) None	DOM: 1), 2), None; 3) Joint Venture required 4) None
	DMA, GRD, GUY, LCA, VCT, SUR: 1) Unbound; 2) None	ATG, DMA, GRD, GUY, LCA, VCT, SUR: 1), 2) None
	DMA: 3) Unbound. None from 1 January 2018	ATG, GRD, GUY, LCA, VCT, SUR: 3) Unbound. Scholarships and grants may be limited to citizens and/or residents. Measures relating to the supply of education and training may result in differential treatment in terms of benefits or prices
	GRD, GUY, LCA, SUR: 3) Unbound	DMA: 3) None, except as indicated in the horizontal commitments.
	VCT: 3) Unbound. None from 1 January 2020	
	ATG, JAM: 1), 2), 3) None	JAM: 1), 2), 3) None, except as indicated in the horizontal commitments
	TTO: 1), 2) None; 3) Unbound; 4) None	TTO: 1), 2) None; 3) Unbound; 4) None
	ATG, DMA, GRD, GUY, JAM, LCA, SUR:4) Unbound except as indicated in the horizontal commitments	ATG, DMA, GRD, GUY, JAM, LCA, VCT, SUR: 4) Unbound except as indicated in the horizontal commitments