



Internationalization of Higher Education Services and Institutional Partnerships

Background Brief for the
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Executive Summary

The international market for higher education is growing steadily. The OECD estimates that the number of post-secondary students enrolled abroad will increase from 3.7 million to 6.4 million by 2025. There are shifts taking place in the global education services market as more developing country markets expand to meet growing international demand. There are valuable opportunities for the Caribbean given the growing global demand for higher education services, the increased mobility of faculty and students and the availability of technology for distance education.

Since 2004, CARIFORUM's global exports of educational services have steadily increased. The growth comes from deliberate efforts by higher education institutions (HEIs) in CARIFORUM to provide their services to international students, whether these students come and study in the Caribbean, do online programmes or remain overseas and take courses offered by Caribbean schools there. CARIFORUM exports have also been boosted by joint programmes with international counterparts and the establishment in the Caribbean of international private schools focused on medical education. European Union (EU) funded initiatives such as CARPIMS and Erasmus Mundus also promote intra-ACP and ACP-EU partnerships and mobility for students and faculty. These international linkages enrich the student and faculty experience and build their global competence, they have also increased the marketability and relevance of programmes and courses offered in CARIFORUM.

The region is uniquely positioned by history, geography and culture to offer differentiated programmes in the Creative Arts, Culinary and Hospitality Management, Agriculture and Forestry, Geosciences, Sports and Theology. There are over 130 colleges and universities across the 15 CARIFORUM States. Most have achieved or are in the process of obtaining international recognition and accreditation. Collectively they offer more than 50 distinct fields of study at undergraduate, graduate and post-graduate levels.

Given the highly competitive market for international students, the definition of the export of higher education services in the Caribbean should be broadened to include the other strengths of HEIs such as the marketing of the results of research and of technical expertise. Regional coordination and public-private sector partnerships are required in CARIFORUM to maximise resources and marketability as an education hub. Policies should address research institutions and the full range of teaching institutions, including universities, colleges, vocational and training institutions and other centres of learning.

The Caribbean should develop strategies for engagement with specific target countries. CARIFORUM States should provide incentives for the international provision of higher education services, for public-private partnerships and for the attainment of international standards of quality in educational products and facilities. HEIs in the region need to decide how should partnerships with foreign universities be used to achieve branding, strategic market positioning and high quality. Finally, governments in the region need to figure out what kind of environment do foreign students expect beyond quality education and how does the Caribbean match up?



TABLE OF CONTENTS

1. International Trends in Higher Education Services	1
2. Higher Education Capacity in CARIFORUM States	2
3. International Institutional Partnerships.....	3
3.1 International Student Recruitment and Student/Staff Exchange.....	3
3.2 Jointly Offered Programmes/ Transnational Education and Franchises	4
3.3 Online courses, Massive Open On-Line Courses (MOOCS)	4
3.4 Marketing CARIFORUM Courses Abroad.....	5
3.5 Branch Campuses, Satellite Campuses ‘Offshoring’	5
3.6 Research and development.....	6
4. Policy Framework for Higher Education in CARIFORUM States	6
5. Facilitating Investment in Higher Education in CARIFORUM	7
6. The CARIFORUM-European Union Relationship	8
7. Facilitation of Higher Education in CARIFORUM - SWOT Analysis	9
8. Preliminary Recommendations for Increasing Exports of Higher Education Services from CARIFORUM	11

INTERNATIONALIZATION OF HIGHER EDUCATION SERVICES AND INSTITUTIONAL PARTNERSHIPS

1. International Trends in Higher Education Services

International higher education is a high growth economic sector that presents viable prospects for the Caribbean which is in the process of developing strategies for insertion and upgrading in the related international services value chains. Higher education services include post-secondary technical and vocational education services and other higher education services. Though state contributions to higher education institutions are declining in some CARIFORUM countries, public investment in the sector is still significant. Public spending as a percentage of gross domestic product ranges from 10.8 % in the Dominican Republic to 21.84% in Belize, compared to the world average of 13.32%. Investment in global education is a strategic imperative for businesses, which in today's interconnected global economy, are major stakeholders in universal access to education.

The main drivers of demand in the higher education sector are demographic and macroeconomic circumstances, as well as national policies on education and related legal frameworks. The United States, followed by China, has traditionally dominated international the higher education services industry, which was estimated in 2011 to be one quarter of the \$903 billion education industry; that is, 5% growth over the previous year. The OECD estimates that the number of post-secondary students enrolled abroad will increase from 3.7 million to 6.4 million by 2025. In the next five years, the highest growth in student outward mobility will be from India, Nigeria, Malaysia, Nepal, Pakistan, Saudi Arabia and Turkey. At that time, the largest tertiary education systems will be China (37 million), India (28 million), United States (20 million), Brazil (9 million) and Indonesia (7.8 million). There are shifts taking place in the global education services market as more developing country markets expand to meet growing international demand, and the Caribbean could gain from more active participation in the international higher education market.

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 2007 it became a net exporter in its trade with all countries. Based on 2010 and 2011 data, the Bahamas, Barbados, Belize and Trinidad and Tobago are net importers of educational services while the Dominican Republic and Jamaica are net exporters. The growth comes from deliberate efforts by private institutions to provide their services to international students face-to-face or through distance education. CARIFORUM exports have also been boosted by joint programmes with international counterparts and the establishment in the Caribbean of international private schools focused on medical education. European Union funded initiatives such as CARPIMS and Erasmus Mundus promote intra-ACP and ACP-EU partnerships and mobility for students and faculty.

Developed and developing economies are responding to market dynamics forcefully by trying to influence trends through strategic policies and marketing, and performance targets linked to

national development. In Europe, higher education institutions have increased their focus on the 'internationalisation' with a trend towards the 'partnership-led' model and more research-led universities are engaging in trans-national education; these include collaborations, joint delivery and accreditation. The American Council on Education (ACE) promotes and advocates international student learning to increase exposure and to build global competence. A major component of Canada's Global Markets Action Plan is its International Education Strategy, which is intended to attract international students and researchers required for long-term success in an interconnected world economy in the 21st century. Singapore, Mauritius, Papua New Guinea (PNG) have workforce-learning initiatives and incentives for investment in world class higher education programmes and facilities. As their education hubs have developed they have become a magnet location for top schools from other countries seeking to have their programmes for part of the hubs. Consistent with the global trend, Caribbean higher education institutions are placing priority on internationalisation. This is reflected in the strategy and vision documents of various CARIFORUM institutions.

Over time, the networks of the "brand name" schools become linked to the other participants, through exchanges and partnership agreements. For example, the European Association of Institutions in Higher Education (EURASHE) has associate membership and partnership agreements with entities in Canada, the United States, the Middle East and Asia. Closer to home, the University College of the Caribbean is a member of the American Council on Education (ACE). Caribbean higher education policies and strategies should facilitate deepening of the region's access to and use of networks to gain visibility and relevance.

In order to arrive at a preliminary assessment of the status of higher education provision in CARIFORUM States, this paper reviews the capacity of institutions in CARIFORUM attending the 3rd CARIFORUM-European Union Business Forum in terms of the types of programmes and subjects offered. The paper discusses examples of the way these institutions provide services to an international clientele and their network of partnerships. This is followed by a snapshot of the existence of policies on education and specifically on higher education in CARIFORUM States. Particular attention is paid to the trade and cooperation relationship of these States with the European Union in the context of the Economic Partnership Agreement (EPA) and special programmes promoting mobility of faculty and staff. An examination of the strengths and weaknesses of, and opportunities and threats to, the CARIFORUM higher education sector informs the closing sections on recommendations for priorities in the Caribbean-European relationship and for facilitation of the sector by CARIFORUM players.

2. Higher Education Capacity in CARIFORUM States

There are over 130 colleges and universities across the 15 CARIFORUM States; most have achieved or are in the process of obtaining international recognition and accreditation. Collectively they offer more than 50 distinct fields of study at undergraduate, graduate and post graduate levels; and have options for continued professional education at the associate, certificate and diploma levels. There are international private tertiary institutions in all CARIFORUM countries. Precise information on private international medical schools in the

Caribbean is difficult to obtain. But Wikipedia lists 31 offshore medical schools in the Caribbean of which about 21 are in CARIFORUM States.

Based on information available on the website of institutions attending the 3rd CARIFORUM-EU Business Forum, the University of the West Indies (UWI) Mona campus provides the largest number of programmes (407), followed by UWI Cave Hill which offers around half that number, and UWI Saint Augustine with 94 programmes of study. Several institutions seem to be at a similar capacity for programme delivery at 70-82 programmes, namely: College of Science, Technology and Applied Arts of Trinidad and Tobago (COSTATT); College of The Bahamas; Northern Caribbean University; University of Guyana; University of Technology. Another tier of institutions provide just over 40 programmes, these include: Saint George's University; Universidad Iberoamericana (UNIBE). Most institutions provide a mix of programmes, however the number of institutions offering post graduate programmes is limited.

The institutions' faculties or schools reflect concentration in the offering of programmes in Business, Education, Engineering, Humanities, Law and Science (Pure and Applied, Science, Science and Technology) thereby suggesting a specialisation of the region in these areas. These subject areas overlap with those most studied in the EU with the exception of manufacturing and construction-related studies, which is offered by UNIBE. In relation to the main areas of labour shortage, [ICT, and Science, Technology, Engineering and Mathematics (STEM)], CARIFORUM should consider improving its offering of subjects on Information and Communication Technologies and Mathematics.

3. International Institutional Partnerships

3.1 International Student Recruitment and Student/Staff Exchange

International student recruitment is a priority for most CARIFORUM institutions, some of which have excess capacity from declining enrolment or investments in expansion. CARIFORUM educational institutions have been strengthening relations with Central and South America and African counterparts. Brazil is being targeted as a market for English as a Second Language courses, while Barbados is hosting Nigerian students for short courses and the Kenson School of Production Technology is trying to attract students from West Africa. Below are examples of other initiatives:

- UWI Open Campus, delivery to African students of Certificate courses in Tourism and Hospitality, and Entrepreneurship in Barbados;
- University College of the Caribbean in Jamaica is receiving government support for a Knowledge City which will be a centre of entrepreneurship and innovation and will be sustained through investment attraction and returns;
- The UCC and the College of Science, Technology and Applied Arts in Trinidad and Tobago have expanded their physical capacity to accommodate the number of new international students targeted;

- The Universities of the West Indies international student recruitment is focusing on specific areas of study including Medicine, Optometry, Veterinary Medicine, Dentistry, Petroleum Geosciences, Agriculture, Biotechnology, Bioresearch, Public Health, Tropical Medicine, Law, Governance and Public Trust, Cultural Studies, Geoinformatics. Taking advantage of UWI's student and faculty exchange agreements is constrained by limited resources for Caribbean participation in overseas study or postings. UWI participates in the Caribbean-Pacific Islands Mobility Scheme (CARPIMS) funded by the EU;
- Student exchange programmes take place between Barbados, Antigua & Barbuda, and Trinidad & Tobago and the French Caribbean Outermost Regions (FCORs).

3.2 Jointly Offered Programmes/ Transnational Education and Franchises

Transnational education programmes include cooperation between institutions for the development and delivery of programmes which may be recognised as joint or double degrees. There are numerous examples in CARIFORUM States. These include:

- American University of Antigua (AUA) College of Medicine led programme of two years of study in the Caribbean (Basic Science) then two years of clinical rotations (Clinical Science) in the U.S. It is recognized by the Medical Board of California, approved by the New York State Education Department and is provisionally accredited by the Caribbean Accreditation Authority for Education in Medicine and Other Health Professions (CAAM-HP);
- Edna Manley College for the Visual and Performing Arts in Jamaica, participates in the EU funded Inter-Reg Carabes programme which facilitates an estimated 15 international students per year and promotes employment in the arts in French Guiana;
- La Universidad Iberoamericana (UI), Santo Domingo has international partnerships to deliver graduate courses in Engineering, Law, Business, Architecture, Medicine, Education, Design, Information Technology, Odontology and Tourism. Main alliances - Florida International University (U.S.), la Universidad de Salamanca (Spain), ISEAD Business School at Villanueva University (Spain), the International Real Estate Federation , Clemson University (U.S.), Nebrija University (Spain);
- University of the West Indies joint International Relations degree offered with the University of Bordeaux in France; and exchange agreement with students of Political Science with Exon Provence, Marseille;
- UCC status as an overseas recognised teaching institution for the University of London (UOL) Bachelor of Law programme in Jamaica and delivery of Florida International University (FIU) modules on behalf of that institution.

3.3 Online courses, Massive Open On-Line Courses (MOOCS)

Digital technologies enable new education delivery methods and can reduce cost and increase access to higher education.

- The UWI Open Campus is the leading provider of distance education in the Caribbean using over 40 sites as a base for online programmes and it provides degree programmes

and continued professional programmes and courses for a combined total of 40 study options. There are plans for expansion beyond the Caribbean and into Diaspora markets in Canada, the U.S. and the U.K. The Open Campus has partnered with the University of Athabasca in Alberta, Canada;

- Massive Open On-Line Courses MOOCs refers to the provision of distance education courses at no or low cost to large numbers of persons. Some traditionally accredited college brands offer free courses via MOOCs, but the model is used outside of traditional institutions. European examples of MOOCs include Iversity in Germany, and Futurelearn in the UK. A pioneer in the Caribbean is the University College of the Caribbean which is launching a pilot for MOOCs.

3.4 Marketing CARIFORUM Courses Abroad

Some institutions have sought to expand their international clientele by moving out of the region to provide services.

- The Arthur Lok Jack Graduate School of Business in Trinidad specialises in part-time study of its 14 Master's and courses tailored for commercial clients. Its strategy for internationalisation is to target foreign cities, including in Brazil. This method of international expansion is the least used by Caribbean institutions.

3.5 Branch Campuses, Satellite Campuses 'Offshoring'

Several 'offshore' medical institutions have been established across CARIFORUM, namely in Antigua and Barbuda, The Bahamas, Barbados, Dominica, Dominican Republic, Grenada, Guyana, Jamaica, Saint Kitts and Nevis, and Saint Vincent and the Grenadines. Below are some examples from the Eastern Caribbean:

- The University of Health Sciences Antigua School of Medicine offers a 4 year degree recognised by the Professional and Linguistic Assessments Board (PLAB) in the U.K. The degree targets students wishing to practice in the UK, and allows students registered at London Metropolitan University's Biomedical Sciences to complete the requirement for the Bachelor of Science in Biomedical Sciences and Doctor of Medicine degrees in Antigua and Barbuda;
- Ross Medical University, Dominica, is accredited by the CAAM-HP and the Dominica Medical Board. Ross University now has another campus on Freeport, Grand Bahama where students in the medical school in Dominica can spend their third and fourth semesters. 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. Nova Southeastern University, an American university also has a campus in The Bahamas;
- Saint George's University in Grenada offers medical programmes, with enrolment primarily by students from the United States, but also students from Italy, Germany, Czech Republic, Hungary, Lithuania, and Portugal. Its graduates have been registered and licensed in the UK, Germany and Greece.

3.6 Research and development

Research collaborations and co-authorship is an important function in the internationalisation of higher education. International co-authors accounts for over a third of global research output and account for increasing rates of international collaborations in Europe. Collaborations lead to the creation of valuable intellectual property, marketable specialisations, and institutional relationships and spurs new market segments. Large developing countries and developed countries are reflecting the highest rates of patenting activities arising from overseas partnerships and some of these are financed through international investments.

- UWI is interested in publicising research internationally and in increasing co-authorship as a part of a wider strategy for building recognition and relevance;
- Caribbean states are already linked to regional tertiary institutions, research institutes and civil institutions from the education sector through the Caribbean Knowledge Learning Network Project (CKLN). The network links Caribbean Community (CARICOM) countries with research and education entities in Europe, North and Latin America, giving them affordable access to e-learning content and other resources. However, the Caribbean needs to increase the CKLN.

4. Policy Framework for Higher Education in CARIFORUM States

Within the CARIFORUM region higher education policy is reflected in National Strategies, Development Plans and Ministry of Education plans of individual States. Education is covered in the National Strategic Plan 2006-2025 of Barbados, Jamaica's Vision 2030 and its National Export Strategy, Trinidad and Tobago's Vision 2020. Some countries are due to revise their dedicated Education Plans, for example Antigua and Barbuda, Saint Lucia and Saint Vincent and the Grenadines. The strategies are generally seeking to increase access to education and workforce capabilities, and promote enterprise and economic transformation. Guyana has a Strategic Plan for tertiary education, while other countries are developing dedicated policies to enhance attractiveness as destinations for higher education services. These include, Antigua and Barbuda, Belize, Jamaica and Trinidad and Tobago.

CARICOM States have committed through plans and legislation to the Caribbean Technical Vocational Education and Training System (TVET) which is administered by the network of Caribbean National Training Agencies (CANTA). CANTA was established because CARICOM governments recognised the importance of TVET to workforce development and economic competitiveness, and they had committed to free movement of certified skilled labour within the CARICOM Single Market and Economy (CSME).

While the demographic imperatives of education hubs like Canada are distinct from those of the Caribbean, the lessons are clear: higher education internationalisation strategies should focus not only on student attraction, but also on potential innovators. They should be underpinned by economic impact assessments revealing the targeted inflow into the Region of

international students, educators and researchers. The strategies should be subject to consultations and streamlined into development and foreign policy. The Caribbean and national “brands” to be promoted also need to be defined.

Non-governmental actors also have a key role to play in the development of the sector. The main industry associations are also active in the CARIFORUM region and the Association of Caribbean Higher Education Administrators (ACHEA), a CARICOM body, is helping to direct the organisation and conduct of the institutions. Counterpart institutions for ACHEA and collaboration in the European Union would include the EURASHE, which is composed of entities that offer professionally oriented programmes and are engaged in applied research. Another counterpart entity is the European Association for International Education (EAIE) which consists of individuals and legal entities actively involved in international higher education collaboration, knowledge exchange and continuous professional development. The Association’s membership spans Europe, North America, Asia, Australia, South America and Africa.

5. Facilitating Investment in Higher Education in CARIFORUM

State contributions are significant in the Caribbean but have to be buttressed by private investments, including from external sources. Caribbean schools have some options for raising external funds to finance their attraction and repositioning in the international education market. Commercial lending terms are prohibitive in the Caribbean so other options for financing should be explored. These include, fundraising through their alumni network, attracting direct investments, whether from local or foreign sources, and engaging in more fee-based activities. Donor funding is also an option for short-term financing with notable support including: European support for services sector development, science and technology and innovation under the EU-CARINET programme, Erasmus + mobility programme; the CARICOM Education for Employment programme funded by Canada which benefits national training agencies; the Organization of American States Engineering for the Americas programme which has a pan-American accreditation system for Engineers; the multi-donor support for the Caribbean Knowledge and Learning Network.¹

Defining CARIFORUM’s value proposition in higher education investments will vary by the type of investor. Students will expect long term benefit such as opportunities, earnings, professional network, experience or other self-fulfilment. Students are demanding more value, at high quality in shorter times. In the OECD the financial return on tertiary education is expected to grow in terms of remuneration and public long term benefits. This is good news for CARIFORUM as prospective students have an incentive to pursue higher education, and many can be facilitated under EU Mobility programmes which allow Europeans to study in ACP states which tend to be a lower cost option. Local investors are likely to be interested in creating future human capital that will enable commercial expansion, loyalty, and corporate social responsibility.

¹ The CKLN institutional partners are the Commonwealth of Learning and the UWI. Network Partners are GEANT, Internet 2, Red Clara. Financial partners are the EU, CARICOM Secretariat, World Bank, IDB, OAS, and CIDA

Strategic investment attraction in the sector can improve CARIFORUM's competitiveness in the provision of higher education services. Some metrics of competitiveness in **Box 1** emerge from observed best practices. However, host countries should be deliberate in capturing as much value as possible. The legal and policy frameworks in CARIFORUM States vary, but the region has an attractive network of international agreements with worldwide partners covering trade, investment, taxation, sustainable development and cross-cutting cooperation.

The Caribbean's participation in international integration movements such as the Commonwealth (of which India, Malaysia, Singapore and 18 African countries are members) and Community of Latin America and the Caribbean (of which Brazil is a member) can also be used as a vehicle for investment promotion. Engagement with Brazil, Russia, India, China South Africa (BRICS) is important as they are increasingly outward investors; their FDI outflows rose from \$7 billion in 2000 to \$145 billion in 2012, accounting for 10% of the world total, compared to 1% in 2000. BRICs are also investing in the region. In 2011, Latin America and the Caribbean accounted for 15.5% of outward FDI stock from the BRICS compared to 29 % for Asia and 4 % for Africa.²

Investment in the sector could have transformative effects for the region if there is similar return to CARIFORUM States when compared to other countries and regions. In 2012, 265,400 international students reportedly spent \$8.4 billion in Canada thereby contributing to 86,570 Canadian jobs. The projections are that attraction of 450,000 international students to Canada by 2022 will create at least 86,500 new net jobs for a total of 173,100 new jobs in Canada sustained by international education, and increase in expenditure to over \$16.1 billion. Innovations in the international provision of higher education services and enabling policies set the playing field for both competition and strategic alliances if the Caribbean wants to upgrade in the international higher education services value chain. Already there are positive trends in the region's performance in the sector and new targets should be set by CARIFORUM Governments.

6. The CARIFORUM-European Union Relationship

Box 1

Defining CARIFORUM's competitiveness in the provision of higher education services

- ✓ Academic staff qualifications
- ✓ Administration that can attract staff from different practices, backgrounds and disciplines.
- ✓ Publication volume and profile
- ✓ Innovation
- ✓ Attractive and relevant course offering
- ✓ Fees and value for money
- ✓ Student performance and alumni professional profile
- ✓ Valuable alumni network
- ✓ World Class Standards
- ✓ Regulation and quality assurance
- ✓ Recognition & equivalency agreements to promote mobility
- ✓ International visibility and marketing

² World Investment Report 2013. (<http://unctad.org/en/pages/PublicationWebflyer.aspx?publicationid=588>).

The 2008 CARIFORUM–EU Economic Partnership Agreement (EPA) increases market access opportunities in most of the European signatory States, which have committed to being open to foreign direct investment in Higher Education, with a linked commitment to allow key personnel and graduate trainees related to the investment to enter Europe. Lesser commitments are made for Contractual Service Suppliers (CSS) with only France and Luxembourg undertaking limited commitments to allow access of university professors. Generally, the commitments on movement of persons are however curtailed by nationality conditions, and in practice visa requirements for most CARIFORUM nationals also serve as an impediment to taking advantage of the EPA.

On the CARIFORUM side, nine States undertook commitments in higher education services. Most were reserved on allowing foreign direct investment, that is, service provision through a commercial presence—the exceptions were Antigua and Barbuda and Jamaica; and the Dominican Republic made joint venture with locals a pre-condition. Dominica and Saint Vincent and the Grenadines will allow investment through commercial presence in 2018 and 2020 respectively. Antigua and Barbuda, the Dominican Republic and Jamaica have opened cross border supply of higher education services. However, notwithstanding commitments in the EPA some states may be more open in practice.

The EPA also provides for cooperation which can be mobilised to deepen the linkages between European and Caribbean higher education services providers. Cooperation can include facilitation of exchange programmes, training, knowledge sharing, technology transfer, SME development, and support for attainment of international recognition of professional qualifications. To gain market share, the Caribbean will need to take advantage of its access to the European international political and economic network, as well as other networks in the Americas and among its developing country partners to mobilise investment and forge strategic partnerships.

The European Bologna process, a part of its inclusive growth strategy, sets targets for the attainment by 2020 of tertiary education in 40% of the 30-to-34 year old population. Unemployment rates are high in several OECD States, and this is occurring in the overqualified and under qualified segments of the labour force. The mismatch of labour taking place in the EU arises from high unemployment and high job vacancies occurring at the same time. The skills mismatch between 2007 and 2010 increased in Ireland, Lithuania, Spain, Sweden, Luxembourg, Finland, the United Kingdom, Denmark, Italy, France, Latvia, Portugal, Slovenia, Estonia, the Netherlands, Greece and Austria.³ The current situation provides a good basis for the expansion/extension of the EU student and faculty mobility schemes with the ACP.

7. Facilitation of Higher Education in CARIFORUM - SWOT Analysis

The Caribbean Higher Education sector has strong prospects for growth. There are existing initiatives to increase foreign student numbers and forge partnerships for global competence

³ See - http://ec.europa.eu/europe2020/pdf/themes/27_skills_gaps_and_labour_mobility_02.pdf.

and international mobility; however, these are piecemeal. The development of a CARIFORUM-wide strategy for higher education, with the support of CEDA and EDF resources, is therefore a timely initiative. International demand trends should inform the Caribbean’s strategy and priority programmes for marketing to an international audience. Given the Caribbean’s unique geography and natural resources, ethnic and cultural diversity, and notoriety in sports and entertainment, the Region can potentially develop unique programmes and a distinct “brand” not only based on novelty but also on quality.

Political will is also required to complete the implementation of the Regional Accreditation System, which should be established urgently to facilitate mobility of students among CARIFORUM higher education institutions. Technology and the new business models enabled by technology require a multi-pronged approach to internationalization by CARIFORUM. In order to capitalize on the opportunities CARIFORUM will need to enhance the legal and regulatory framework for internationalization; for example, through appropriate immigration, data protection and cyber security infrastructure, as well as the strengthening of administrative capacity and relationship management services.

The table below suggests some strength weaknesses, opportunities and threats as CARIFORUM moves forward with this initiative.

Table 1: CARIFORUM SWOT Analysis

STRENGTH	WEAKNESS
The institutions of CARIFORUM States offer a wide range of higher education programmes for varied needs.	Lack of data on internationalisation in the CARIFORUM region and on higher education’s wider economic impact.
The demographics of the Caribbean has led to an international faculty.	Limited specific strategies for promotion of the higher education sector.
Large number and long experience with international partnerships between higher education institutions.	Limited public financing for new investments in higher education.
International recognition of the quality of many CARIFORUM programmes/course of study.	Some CARIFORUM States require updated policies and strategies that target higher education services.
Europe has a mismatch of skills and demanded labour which increases the pool of persons seeking education & training.	The Caribbean “brand” requires definition and a supportive strategy.
National policies of the source market promote study abroad and international collaboration.	Limited intra-regional cooperation among higher education institutions..
Programmes offered by CARIFORUM institutions match areas of skills shortage in partner markets.	Limited regional coordination of strategies for increasing international provision of higher education services, including the treatment of international educational institutions in the region.
Lower cost CARIFORUM option could ease or prevent student debt burden in high priced source markets.	CARIFORUM may not be a least cost/highest value option for study when compared to major competitors.
New investments are being made in the higher education sector and research by Caribbean investors.	The regional accreditation system is still in the process of implementation.
OPPORTUNITY	THREAT
Policies in key CARIFORUM partner markets promoting education and study abroad.	Limited access to finance for local students prevents full utilisation of existing international partnerships and is reducing enrolment in some States.
Availability of technology which enables remote provision of education services and potentially the international visibility and recognition of institutions in CARIFORUM.	More restrictive visa regimes for international students and prohibitive visa requirements in partner markets.
Changing attitudes towards studying at traditional schools.	The Caribbean has relatively low investment attraction rates when compared to other countries and regions.
The Caribbean’s international network is a potential source of investment.	

8. Preliminary Recommendations for Increasing Exports of Higher Education Services from CARIFORUM

- i. CARIFORUM has strong political and economic international networks that can be leveraged to propel the higher education sector. The Caribbean should develop strategies for engagement with specific target countries. Like Canada, the Caribbean should use diplomatic missions to support educational and research institutions and investors, and to attract “job and prosperity creating” international students and faculty;
- ii. The Caribbean’s participation in international integration movements comes with access to preferential frameworks for recognition of academic and professional qualifications which are necessary to enable the mobility of international students, graduates and faculty. Efforts should be made to raise the standard of institutions and their programmes to internationally recognised standards, and to develop regional standards where necessary;
- iii. There is notable movement towards putting a specific policy framework in place for higher education services exports but these are discrete and ad hoc activities. Regional coordination at the public and educational institutional level is required by the Caribbean to maximise resources and marketability as an education hub. Policies should address research institutions and the full range of teaching institutions, including universities, colleges, vocational and training institutions and other centres of learning.
- iv. Given the highly competitive market for international students, the definition of the export of higher education services in the Caribbean should be broadened to include the other strengths of Higher Education Institutions (HEIs) such as the marketing of the results of research and of technical expertise.
- v. Higher education internationalisation strategies should focus not only on student attraction, but also on potential innovators; they should be underpinned by economic impact assessments revealing the desirable inflow into the Region of international students, educators and researchers.
- vi. It is also necessary to define the Caribbean and national “brands” to be promoted, and the appropriate business models for the Caribbean;
- vii. Given high unemployment rates in the region, policy and strategy development should examine the workforce models that facilitate education services and ultimately address wider issues of job creation, innovation and inclusive economic growth. To this end, the strategies of Canada, Singapore, Papua New Guinea and Mauritius that link workforce development with national economic development should be analysed by CARIFORUM States;

- viii. CARIFORUM States should capitalise on existing international networks and increase investment attraction efforts through coordinated efforts in multiple processes—for example, EU-CELAC, CELAC-China, BRICs;
- ix. Comprehensive programmes of revenue generation from international sources including research funding, fund-raising, the exploitation of Intellectual Property, and consulting among others must be supported by institutional offices and qualified individuals;
- x. CARIFORUM States should provide incentives for the international provision of higher education services, for public-private partnerships and for the attainment of international standards of quality in educational products and facilities;
- xi. CARIFORUM governments and educational institutions should adopt best practices by improving the information available on current and planned initiatives to promote the sector, by carrying out stakeholder consultations, and by establishing appropriate institutional coordination mechanisms.

8.1 Discussion Points for the 3rd CARIFORUM-EU Business Forum

The recommendations in this paper will be completed following the 3rd CARIFORUM-EU Business Forum based on contributions made by stakeholders at the event. Participants in the Higher Education Services sessions should consider the following questions which can inform a strategy and a road map for this sector:

- i. How does the Caribbean want to position itself in the international higher education services market; for example, high quality education at a reasonable price? Or should there be specialization in a few areas of strength?
- ii. What market segments will be targeted by Caribbean institutions? Students who cannot afford the cost of education in their own countries but still want a quality education (USA, UK)? Students from low income countries who cannot afford the high tuition fees in the USA or the EU (e.g. European countries)?
- iii. What quality assurance systems are required in the Caribbean context?
- iv. How should partnerships with foreign universities be used to achieve branding, strategic market positioning and quality?
- v. What strategies can be used to attract the best faculty and researchers? Should the Caribbean also recruit retired professors with exceptional reputation who want to continue to teach in a lower-stress environment?

- vi. What kind of environment do foreign students expect beyond quality education and how does the Caribbean match up? Immigration constraints? Accommodation? Healthcare? Leisure/recreational activities?

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