Jamaica, a leading per capita export country known for its commitment to creativity, innovation and exceptional quality.

April 2009

The National Export Strategy of Jamaica was developed on the basis of the process, methodology and technical assistance of the International Trade Centre (ITC).

www.jamaicatradeandinvest.org/nes | 1-888-429-5NES (1-888-429-5637)
Education

Introduction

Rationale

Jamaica’s education system must now be seen as an industry. This is the imperative of the Strategy for the Promotion of Professional Export Services from Jamaica, as well as the Export Strategy.

Jamaica has an active and vibrant education industry with strong growth potential. There are a number of well-established public and private institutions and a range of study offerings in an attractive location. By building on these strengths, Jamaica could develop a viable education export industry capable of providing significant foreign exchange earnings. The country has the potential to become a destination for students interested in university degree programmes, specialised professional and vocational training, and English Language Training (ELT).

Focus Areas and Related Programmes

The Export strategy for the Education sector is an enhancement of the baseline work done in the Strategy for the Promotion of Professional Export Services from Jamaica, which identifies tertiary education and English Language Training (ELT) as areas of focus for the strategy. Jamaica has advantages in three segments of the education market that should allow it to attain varying degrees of success in export markets. These are university education, TVET and ELT. The first two areas can be grouped together under the term tertiary education and treated as one segment.

The primary mode of delivery for focus is Mode 2: Consumption Abroad. Similar to tourism, and some entertainment products, the service is exported when the individuals travel to Jamaica. Mode 1 is currently underdeveloped, but has potential. Modes 3 and 4 are currently practised by some institutions.

As the previous work was focused on the promotion of education services, this strategy also looks at additional areas covering development of the sector as well as some market access issues.

Vision 2030 Jamaica also looks at Education in the context of it as a social sector for development. The Export Strategy treats the focus areas as primary export services.
Where Do We Want to Be?

The Vision

Jamaica is a preferred education destination offering quality programmes in specialised areas.

Goals & Objectives

Export earnings of over US$30 million achieved from:

1. 1,000 additional extra-regional students at tertiary institutions\(^1\) with differential fee structures per year.

2. 1,000 additional regional students at tertiary institutions\(^2\) with homogenous fee structures per year.

3. Attract 3 foreign ELT providers to Jamaica and increase the number of ELT students by 500.

Where Are We Now?

An Assessment

Export Performance and Assessment of Overall Competitiveness

Unfortunately, there is no data on the value, growth or extent of education services exports from Jamaica. However, a summary of the current status of the two segments within the scope of the strategy (taken from the Professional Services Export Promotion Plan) is presented below:

Tertiary education:

Jamaica has nearly 60 tertiary education institutions offering a wide array of services and in that respect is well-equipped to meet the demand for education. There are 14 universities, 3 of which are public, 3 private and 8 are ‘offshore’ institutions that have been granted a license to operate in Jamaica. Non-university institutions account for the majority of the tertiary education sector. Public institutions in this group include teachers colleges, community colleges, a TVET institute and special training colleges for civil servants. On the private side there are theological colleges, business colleges, nursing and midwifery schools, professional studies colleges and various technical institutes. A wide variety of degree programmes are on offer, supplemented by diplomas and certificates available through the range of non-university facilities. Some institutions, such as the University College of the Caribbean (UCC), offer distance learning programmes and have been able to export their services in this way. Online training programmes also present an opportunity for educators

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\(^1\) These institutions include UWI, Mico and NCU.

\(^2\) These institutions include the University of Technology (UTech), the UCC and the International University of the Caribbean (IUC).
to travel to other countries and deliver training in-person as a supplement to the virtual offering.

In terms of competitiveness, the Jamaican tertiary education segment can be assessed across three dimensions:

- **Cost structure:** Public universities in Jamaica offer subsidised tuition to regional students, as does other Caribbean countries, so tuition is less of a distinguishing factor in that market. Although the cost of living may be higher than in some of the region’s smaller countries, the difference is unlikely to be a prohibitive factor. The cost of tuition, living and travel for extra-regional students is considerably cheaper than what is required to study in countries like the US and the UK. The University of the West Indies can be used as a high water mark indication of the cost of extra-regional undergraduate tuition. The 2007-08 figure of US$11,263 compares well with the average annual tuition fee of £8,600 (US$17,200) for undergraduate international students at UK universities. The US College Board indicates that the average annual tuition costs for out-of-state residents in 2007-08 would be US$16,640. At private institutions, the cost rises to US$23,712.

- **Quality & reputation:** A tradition of investment in education has built up a solid base in the tertiary education sector. However, public sector institutions have suffered from a lack of investment in recent years. While Jamaica does have a sound regional reputation as a centre for tertiary education, when considering the global market, neither the country nor the region are high profile destinations for extra-regional students. No Jamaican universities appeared in the 2005 Shanghai Jiao Tong University ranking of the top 500 universities in the world or The Times’ ranking of the Top 200 World Universities in 2007. This reputational disadvantage is a factor that will have to be addressed if extra-regional exports are to increase dramatically.

- **Environment:** Jamaica offers a vibrant culture and excellent quality of life, as evidenced by the country’s thriving tourism industry. However, safety will likely be a concern due to crime rates. Given that a number of educational institutions are located in Kingston where crime is highest,
this factor may be a deterrent to potential students.

**ELT:**

Jamaica's strength in tertiary education does not extend to the ELT sector. There are a few institutions that offer programmes but the country does not have a wide network of training providers that international competitors, such as Malta, and regional competitors, such as Trinidad and Tobago, feature. As a result, it does not enjoy a reputation as a centre for ELT, which will pose a barrier to increasing exports for existing schools. However, the country does possess many of the qualities that have allowed Malta to build up a successful ELT industry, primarily an attractive location. Jamaica's qualities as a tourist destination and the variety of activities it can offer to students are apparent. Its strong tertiary education system also presents an opportunity for graduated learning on the back of ELT. Capabilities in TVET could also be wedded with language training to present an integrated offering in areas such as tourism, and ELT students could also be targeted for entrance into tertiary programmes following their language training.

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**The Sector’s Value Chain**

**Current Value Chain Dynamics**
- Quality programmes are not known in target markets
- Potential destination of choice in select areas of study
- Inadequate housing to capitalise on export potential
- Opportunity for greater coordination and collaboration among institutions

**Future Value Chain Imperatives**
- The destination is promoted for its quality education programmes and such a reputation is established.
- Programmes in identified priority areas are strengthened to facilitate expansion.
- Housing opportunities are exploited to enable foreign students to take up study opportunities in Jamaica.
- There is increased collaboration among institutions to maximise their strengths and exploit global opportunities.

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**Key**
- Current Value Chain Activity
- Future Value Chain Activity (i.e., not currently being done)
- International Value Chain Component
- Currently a component of the National Value Chain
- To become a component of the National Value Chain
- Gradient fill is part local and part international
The value chain for the tertiary industry is attached. In the development of the current model, the following was noted with respect to the presence of the key professionals that participate in the value chain:

- There is a pool of Quality academic administrators to develop policy, standard operating procedures, and systems. These professionals and therefore the industry capability may be enhanced by global network participation that would facilitate learning about best practices that may be introduced locally, as well as incorporating a global perspective into the programmes.

- Instructional Designers:
  - There is adequate presence in the programmes for mature industries (those for which academic programmes have been in existence for some time that have produced practising professionals with experience and expertise that may be returned to the education sector). In the case of medicine for example, practitioners very often return to teach. The reasons cited include the flexibility in their practicing profession, the knowledge cycle (in addition to sharing knowledge they also get to refresh and upgrade based on developments), and because these professionals remain within their sphere of expertise. In other areas of study, the mobility of skills across industries and sub-fields means that professionals may change areas of focus several times throughout their career and not gain the same level of expertise or knowledge in a specific field.
  - There are gaps for instructional designers in specialty and emerging fields such as ICT.

- Lecturers (fulltime and adjunct): There is a large pool of existing and potential experts in areas of study. Many are without educational qualifications, however, which may be an issue. Although there are programmes for training and certification in education, these are currently voluntary.

The Sector’s Future Value Chain is not structurally different, and the future desired state of the industry is articulated on the existing value chain illustration.

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5 Diploma in Education (professional one-year programme), BSc. In Education, as well as train-the-trainer certificate and non-certificate programmes.
Based on the value chain, the following analysis was also done.

<table>
<thead>
<tr>
<th>Generic</th>
<th>Mode 1: Cross-Border</th>
<th>Mode 2: Consumption Abroad</th>
<th>Mode 3: Commercial Presence</th>
<th>Mode 4: Temporary Movement</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Border-In Issues</strong></td>
<td>• Heavy emphasis on academic perspective. Many programmes not practical enough.</td>
<td>• Lecturers/instructors without teaching certification.</td>
<td>Lecturers/instructors without teaching certification.</td>
<td>Lecturers/instructors without teaching certification.</td>
</tr>
<tr>
<td></td>
<td>• Practitioners without teaching certification.</td>
<td>• No state-of-the-art classroom facilities to (i) enhance learning (ii) extend reach.</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>• Insufficient physical space in strategic locations.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Lack of affordable accommodation in appropriate areas.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Border Issues</strong></td>
<td>• High costs of energy when using more technology.</td>
<td>Infrastructure (telecoms) nationally exists, but the full capabilities of each institution to realise the potential of opportunities by this mode needs to be understood to determine why there has not been more export activity.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Cost of accreditation.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Border-Out Issues</strong></td>
<td>• Unawareness of the quality of Jamaican programmes and quality of the institutions among targets (No established reputations as an education destination).5</td>
<td>• Significant resource requirements for establishing presence (information, accreditation, etc.).</td>
<td>• Visa and work permit requirements for some target markets are challenging.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• There has been no country promotion as an education destination, and traditionally no support to this and other services sector to the levels provided goods exports.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• The student visa regime could be streamlined.</td>
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<td></td>
</tr>
</tbody>
</table>

6 Except in specialised areas of medicine such as emergency and tropical diseases, and cultural studies, where our strengths are well known.
Performance against Critical Success Factors

<table>
<thead>
<tr>
<th>Critical Success Factor</th>
<th>Where are we?</th>
<th>Where should we be?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Obtaining international accreditation, such as the Southern Association of Colleges &amp; Universities (USA), or Accrediting Council for Independent Colleges and Schools.</td>
<td>M</td>
<td>M</td>
</tr>
<tr>
<td>Range and quality of institutes and programmes (applicable to destination and its institutions).</td>
<td>M</td>
<td>H</td>
</tr>
<tr>
<td>Quality of lecturers.</td>
<td>H</td>
<td>H</td>
</tr>
<tr>
<td>Quality of graduates.</td>
<td>H</td>
<td>H</td>
</tr>
<tr>
<td>Partnerships with institutions with high standards and established reputations.</td>
<td>H</td>
<td>H</td>
</tr>
</tbody>
</table>

The sector is confident that they are able to perform well against the critical success factors. The need to address the cross-sector, and national promotional challenges are therefore critical in facilitating the sector’s advancement.

**Government Policy and Strategy in Support of the Sector**

This is typically related to adequately addressing the domestic market needs as well as facilitating exports based on the movement of persons (with the latter being driven by the need to fill gaps created by migration rather than from a strategic standpoint). Additional areas of export growth opportunity are not currently addressed, but will hopefully be included in the work of the National Coalition of Services Industries (NCSI).

**The Sector’s Trade Support Network: Capacity, Competency and Coordination**

The primary members of the policy and services network for the education sector and in particular those areas covered by this Export Strategy are the University...
Council of Jamaica and the Ministry of Education. The National Coalition of Services is recently established in Jamaica to provide support for the development of this and other services industries.

Only the latter seeks to treat the industry as a viable export industry. It will therefore be key in the work with current service providers not yet engaged in the industry’s growth as an export industry, to upgrade them to serve the institutions. The NCSI may ask work with the UCJ and Ministry of Education to advance the development of the industry through policy and training.

**SWOT Analysis of the Sector**

**Strengths**

- Available pool of Quality academic administrators to develop policy, standard operating procedures, systems.
- Jamaican programmes have high mobility in terms of articulation and accreditation.
- Extra-curricular and professional programmes, such as athletics (UTech).
- High mobility (articulation and accreditation).

**Weaknesses**

- No tracer studies have been done to establish benchmarks that may be used to advise policy, programme design, benchmarking or promotion.
- Capital investment for the sector – as an attractive investment sector.
Opportunities

- The further development of the academic administrators through global discussion and networks to enhance programmes through best practice adoption and a global perspective.
- Diversification of the bed & breakfast accommodation subsector and real estate rental industry for foreign students.
- Linking programmes of study based on our unique factors.
- Recognition of quality professional and demand for these which could be translated to the quality of our training institutions.
- May capitalise on the strength of extra-curricular and professional programmes eg. Athletic training.

Threats

- Limited funding from both public and private sources to facilitate growth and expansion of the sector.

The Way Forward (over 3-5 years):

The Development Perspective: Developmental Considerations and Priorities

Employment: A range of persons are employed both fulltime and part-time in the industry, with wages in tertiary institutions being higher than for many institutions. The industry provides an avenue for professional transition when an expert leaves an area of practice to become an educator, which also frees employment positions.

Regional: the location of institutions in disadvantaged regions is currently being facilitated through distance programmes. Based on the limitation in physical space in some areas, which may be close to industry that would enhance programmes of study, and with still low numbers of foreign
students to fill spaces that would not be occupied by nationals in non-urban areas, the location of institutions is not as widespread across the island. The opportunity exists however based on (i) lower levels of crime (ii) potential proximity to experts and resources. For example a tourism institute in a resort town, or an agricultural institution in a rural area.

Environment: like most services, the impact on the environment is minimal.

The Competitiveness Perspective

Border-In Issues and Priorities

- Capital investment in the sector is critical. The current sources of funding are public and private. The latter includes (i) industry, who may fund infrastructure and programme development for their particular sector, (ii) philanthropy and of course (iii) student revenue. Significant expansion of current institutions or the introduction of new players, will not be achieved with current levels of investment, however, and so the development and promotion of the sector as a viable investment option becomes crucial.

- Instructional design capabilities are present in mature sectors (such as medicine) where practitioners return to teach. This enhances the knowledge cycle and continues to strengthen the sphere of expertise – students benefit from experience of practitioners who continue to lean and upgrade in the educational sphere. However there are gaps in some specialised areas, such as ICT, and may require external/foreign expertise and the development of local capabilities.

- There is a large pool of experts who are potential adjunct and fulltime lecturers, but many lack educational instruction qualifications, which are currently voluntary. The implications of making such requirements mandatory are not known, but would have to be assessed to determine if it would be a deterrent and hence reduce access to this pool of experts.

Border Issues and Priorities

- As with other industries, the costs of doing business are high, and the levels of crime impacts the destination’s perception and performance.
The Client Perspective

Client Prioritisation

The prioritisation of institutions in this sector is not as straightforward based on the options for exporting and the capabilities that are required for each mode. Most institutions are also able to export via Mode 4 (movement of persons) for short courses, or based on partnership arrangements with overseas institutions. Investment to pursue some options for cross-border, such as the master teach model using video technology is high based on the costs of technology acquisition (for state-of-the-art classrooms) and operations (such as Internet usage rates), and thus limits some institutions from pursuing such an option. Internet and use of physical materials (CDs, DVDs, printed publications) for distance learning are more feasible options for the short term. The most challenging mode to pursue is overseas presence. Fortunately, an institution may successfully export using one or a combination of other modes. Essentially, more detailed classification would be done and would have to be applied by each mode of delivery.

Current Exporters and Other Current Participants in the Value Chain

By virtue of the programmes and some support structures, most institutions are already capable of exporting services and are doing so to even a small extent. Their quality and capacity enables these institutions to accept foreign students (Mode 2).

Potential Exporters and Other Potential Participants in the Value Chain

These are primarily the institutions that have developed strong programmes, however are challenged in delivering these through overseas partners, distance methods or based on classroom capacity. Provided these institutions may increase their physical capacity for instruction, and provide or partner to offer adequate housing in the vicinity of the institution, then they may transition to become more active exporters.

Aspiring Exporters and Other Aspiring Participants in the Value Chain

The smaller institutions that fall into this category typically remain this way without expanding to export. They are therefore no specific considerations for this group in the strategy at this time.

Implications for Sector Support Services

A key consideration for support is the treatment of the education sector as an export industry and therefore the provision of such services to the group.
The National Coalition of Services Industries is envisioned to be a service provider for the sector, and would have to be so resourced.

There are even greater implications for the policy network, whose actions limit the competitiveness of the sector in exports, such as in the areas of housing and crime.

Quality Management

Institutions are typically focussed on the quality aspects, as reflected in their performance against critical success factors. The basis of their competition, even locally, is the quality of their programme and so there is a focus on quality throughout (design to delivery).

Business Competency

There is typically no issue related to business competency. The same business and related skills required for the domestic market may be applied for the international student market, or is readily available within the institutions.

Trade Information

It was difficult to assess the issues related to trade information based on the stage of the industry. Based on the Professional Services Export Plan, it may be inferred however that there are gaps in the gathering and provision of trade information related to the sector.

Finance

As with all other industries, new areas of financing are needed by the sector. The challenge faced with this sector is the ability to attract funding for the nature of its business, which is typically seen by targets as an area to be funded by student fees, government or philanthropy.

The Institutional Perspective

Strengthening the Sector’s Strategy Support Network:

As mentioned at the outset, the perspective of the education sector (and in particular the focus areas identified) has not been from an economic or export industry view, and as such the strategy support network has been focussed on policies to address the social role of the sector. The sector must therefore now be included in the scope of relevant entities with such an approach, and/or the scope and perspective of the current strategy support institutions be adjusted. The main strategy institutions would be the Ministry of Industry, Investment and Commerce (MIIC) and the Ministry of Education. The NCSI would also be a member of this network.

Strategy Coordination and Management:
The NCSI would be integral in strategy management and coordination. However there is also a recently established body of private tertiary institutions that could be engaged in the strategy management and coordination. The preliminary stages will need to focus on the network relationships and structure, as much as the strategy implementation itself, and continue to work to understand and strengthen partners and stakeholders.

**Structure and Process (Strategy Monitoring):**

The proposed structure and process, for only the start, would be to have the NCSI support the sector until a strong sector entity is fully established. Once the NCSI is established then the support activities would be undertaken by this body that would also engage the Jamaica University Steering Committee. Representation from public tertiary institutions as well as the non-tertiary institutions that fall within the scope of the strategy would also have to be obtained.
**Vision**

**Jamaica is a preferred education destination offering quality programmes in specialised areas.**

**Development Perspective**

The sector provides a range of full-time and part-time employment opportunities through establishment of new institutions and diversification of programme offerings.

**Competitiveness Perspective**

<table>
<thead>
<tr>
<th>SUPPLY SIDE (BORDER-IN)</th>
<th>TRANSACTION COST OF BUSINESS (BORDER)</th>
<th>DEMAND SIDE (BORDER-OUT)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increased capital investment in the sector.</td>
<td>Crime reduced thus lessening its impact on customer perception of the destination.</td>
<td>Awareness of Jamaica as a destination for education increased.</td>
</tr>
<tr>
<td>Trained and certified pool of experts for service delivery increased.</td>
<td></td>
<td>Education destination marketing support provided.</td>
</tr>
</tbody>
</table>

**Client Perspective**

<table>
<thead>
<tr>
<th>TRADE INFORMATION</th>
<th>STANDARDS AND QUALITY MANAGEMENT</th>
<th>BUSINESS DEVELOPMENT AND EXPORT READINESS</th>
<th>FINANCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Information of global training needs and trends provided.</td>
<td>Institutions continue to focus on quality of programmes, trainers/educators and facilities.</td>
<td>Instructional Design capabilities in priority specialised areas are enhanced.</td>
<td>Affordable and accessible financing provided for continuous improvement of institutions.</td>
</tr>
</tbody>
</table>

**Institutional Perspective**

The Jamaica Coalition of Services Industries is established as the focal point for coordinating support to the industry including engagement of the Jamaica University Steering Committee development and promotion.
### Action Plan

#### The Development Perspective

<table>
<thead>
<tr>
<th>Objective</th>
<th>Measures</th>
<th>Targets</th>
<th>Initiatives</th>
<th>Owner/Support Entities</th>
<th>Timeline</th>
</tr>
</thead>
</table>
| To increase the levels of export-oriented investment in the sector | Number of FDI projects in the Education sector. Number of ELT students studying in Jamaica. | 4 | 500 | • Develop Investment profiles and target investors for  
  • 3 foreign ELT providers.  
  • private medical training.  
  • criminology studies.  
  • Target investment for executing the Knowledge City concept. | Lead: JTI Partners: NCSI JUSC Ministry of Education | Y1-3 |

#### The Competitiveness Perspective

**Border–IN: (Value Chain Development)**

<table>
<thead>
<tr>
<th>Objective</th>
<th>Measures</th>
<th>Targets</th>
<th>Initiatives</th>
<th>Owner/Support Entities</th>
<th>Timeline</th>
</tr>
</thead>
</table>
| Improved range and quality of programmes that are offered by tertiary institutions | Number of additional regional students at tertiary institutions with homogenous fee structures per year. Number of additional extra-regional students at tertiary institutions with differential fee structures per year. | 1,000 | 1,000 | • Develop curricula for specialised areas that would appeal to international students for e.g. cultural studies.  
  • Promote ESL / ELT as an export opportunity for local institutions.  
  • Enhance universities’ cooperative education, including internships, positioning/promoting Jamaica as a location for overseas cooperative options.  
  • Provide support to attract funding for individual or common (first-rate) library.  
  • Review Dubai Knowledge City model among others to develop a best of breed model for Jamaica. | • Cluster Services Coalition JTI | Y1 |

**Border**

<table>
<thead>
<tr>
<th>Objective</th>
<th>Measures</th>
<th>Initiatives</th>
<th>Owner/Support Entities</th>
<th>Timeline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Crime</td>
<td>As above</td>
<td>Advocate for instituting proposed interventions to address crime, and participate in initiatives where appropriate.</td>
<td>• Cluster Services Coalition</td>
<td>On-going</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Trade Facilitation</th>
<th>Measures</th>
<th>Initiatives</th>
<th>Owner/Support Entities</th>
<th>Timeline</th>
</tr>
</thead>
</table>
| To increase the number of foreign students in Jamaica | As above | • Examine the work permit regime and submit recommendations to make it comparable to that operated by the UK or other foreign study market selected as best model.  
  • Improve the student visa and work permit regime by streamlining visa application procedure for students and firms to facilitate work-study programmes. | • Ministry of National Security NCSI | Y2 |
# Action Plan

<table>
<thead>
<tr>
<th>Objectives</th>
<th>Measures</th>
<th>Targets</th>
<th>Initiatives</th>
<th>Owner/Support Entities</th>
<th>Timeline</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Infrastructure</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| To increase the number of foreign students in Jamaica | As above | As above | • Develop student rentals programme for homeowners.  
• Develop investment proposals for student housing. | Ministry of Finance  
JT  
Ministry of Housing  
NCSI  
JUSC  
TPDCo | Y1 – 2 Y1 |
| **BORDER-OUT** | | | | | |
| Sector Promotion | | | | | |
| Jamaica is perceived globally as a preferred education destination | As above | As above | • Conduct groundwork to determine what considerations are required for ranking and how this may be instituted (regionally or nationally to get on international lists).  
• Develop a “Study in Jamaica” website. | Cluster Services Coalition | Y1 |
| **THE CLIENT PERSPECTIVE** | | | | | |
| Client Focus | | | | | |
| Increased engagement in export activities | Number of institutions actively exporting (any mode) | 10 | • Conduct export awareness programmes for the sector to encourage and foster exports.  
• Provide export-readiness training and upgrading to institutions to facilitate export activities. | Lead: NCSI  
Partners:  
JUSC  
JT  
UCJ | Annual |
| Trade Promotion | | | | | |
| Same as sector promotion | Same as sector promotion | Same as sector promotion | • Raise the profile of local universities using a multi-faceted approach through the following initiatives:  
• Develop strategic alliances with foreign universities to offer combined programmes and offering partial scholarships to a select few top foreign students.  
• Individual institutions international promotion of their programmes.  
• Engage trade promotion service providers to include the sector in client targeting and servicing. | NCSI  
Individual institutions  
Services Coalition  
JT  
JE | On-going |
| **THE INSTITUTIONAL PERSPECTIVE** | | | | | |
| To strengthen the management structure for the sector’s development and the level of networking and cooperation in the sector | | | • Provide support to strengthen the Jamaica University Steering Committee Consortium.  
• Foster increased institutional collaborations (such as UCC/UTECh MOU and articulation agreement between UCC-UWI).  
• Collaboratively develop an inventory of programmes to be used as a strategic input for the sector. | NCSI  
Services Coalition | Y1-2 |
Annex 1: Overview of the Sector’s Global Market (Professional Services Plan)

Global Trends and Supply Markets

As economies develop more specific knowledge-based industries, there is an increasing need for employees to have very specific skill sets and areas of expertise. Additionally, in rapidly changing sectors such as ICT, where new programming and software applications are continually being developed, those working in the industry often require ongoing training. With an increasing range of technology and applications developing in the workplace, the demand for specialised skills is increasing. However, developing expertise in these new disciplines does not always require a degree-length programme. This has created a need for focused instruction in a variety of technical and vocational areas and well as traditional university education.

Despite the growing number of students travelling for study, much of the response to this demand has come from domestic providers serving domestic needs. Both the university and the TVET industries have developed a range of short and long courses aimed at students and those in work. In addition to publicly-funded systems of education, a huge training industry has developed in the private sector in the developed countries.

While students travel widely for education purposes, there is a heavy flow to accepted education destinations. Six countries host 67% of the world’s international tertiary education students, with 23% studying in the US, followed by the United Kingdom (12%), Germany (11%), France (10%), Australia (7%) and Japan (5%).

In the UK, publicly-funded universities and the TVET industry, both public and private, have been marketing their services abroad under the umbrella of the British Education Suppliers Association or individually. Education is a huge export industry and in the 2003-04 academic year, around £28 billion was earned from overseas students studying at a variety of institutions, including universities, small English language colleges and independent schools. Exports increased by £5 billion over the

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7 Global Education Digest 2006, UNESCO Institute for Statistics.
8 Global value – The value of UK education and training exports: an update. Dr Pamela Lenton, September 2007. Published by the British Council:
Information on the report was also taken from the British High Commission and the Guardian. Both sources can be found at:
  age&cid=1153389466360&a=KArticle&aid=1188491047625
- http://education.guardian.co.uk/students/internationalstudents/story/0,,2171234,00.html
previous two years, a rise of 21%. At nearly £28 billion, education exports are a larger earner of foreign exchange than the financial services (£19 billion) and automotive (£20 billion) industries. It should be noted that the export figure includes earnings from consultancy, publishing, the sale of educational equipment and broadcasting. Growth in overall revenue accounted for by international students was also sharp, and this group generated nearly £8.5 billion in 2003-04, an increase of 39% over the 2001-02 figure of £6.1 billion. The report indicates that the 6,426 full-time equivalent international students studying in the UK spent an estimated £10,161 each on living expenses.

These figures indicate how large the industry has become and the scale of its economic importance to countries with well-established education sectors. The fact that education is a business is one that countries are increasingly accepting. Canada and Australia now regard their education systems as industries with increasing export focus. They have promoted them vigorously by developing national websites and assisting local providers to market their services abroad and as part of their destination promotion activities. Previously weak links between tourism and education are growing. Smaller players such as South Africa and Malta are also following the example set by leading nations. Malta, in particular, has seen the benefits of combining ELT and university/TVET provision with students in the former encouraged to stay on for services of the latter. A new business association has been formed that combines ELT with TVET and this is now promoting both together.

In the Caribbean, travel abroad to undertake university or TVET training is a well-established practice because small countries face a challenge in meeting education needs comprehensively in-country. However, the provision of education remains focused on suiting the needs of local students with little attention given to exporting. Indeed, a system of restricting places on offer to foreign students is a common practice. The advent of foreign investment in medical and nursing schools has aroused interest in exporting education but this is viewed as an enclave activity. Policy makers have not embraced the changed thinking regarding the role education can play as an export industry.

Nevertheless, the market for tertiary education exports within the Caribbean exists and is likely to grow as a result of greater demand for specialist skills. The regional demand could form the spring board for exports further afield.