

**Consultancy for the Development of a Regional Export Strategy for  
Higher Education Services  
Terms of Reference**

## **1. Background Information**

### **1.1 Beneficiaries**

The beneficiaries of this assignment are CARIFORUM stakeholders in the Higher Education Services sector i.e. Education services leading to a university degree or equivalent.

#### **Contracting Authority:**

The Caribbean Export Development Agency

### **1.2 Relevant Background:**

The Caribbean Export Development Agency (Caribbean Export) is a regional export development and trade and investment promotion organization of the Forum of Caribbean States (CARIFORUM). Caribbean Export is also a beneficiary of funding assistance from the 10<sup>th</sup> European Development Fund (EDF), under which the Agency is responsible for implementing the Regional Private Sector Development Programme (RPSDP). The RPSDP has four specific objectives: a) Enhancing Competitiveness and Promoting Innovation among CARIFORUM's Private Sector; b) Promoting Trade and Export Development among CARIFORUM States; c) Promoting stronger trade and investment relations among CARIFORUM and French Caribbean Outermost Regions (FCORs) as well as European Union (EU) Overseas Countries and Territories (OCTs) in the Caribbean; and d) Promoting stronger trade and investment cooperation between CARICOM and the Dominican Republic (DR). There is also a complementary objective of strengthening the institutional capacity of Caribbean Export to implement trade and investment promotion programs in the region through its export development programming and through support to the Caribbean Association of Investment Promotion Agencies (CAIPA).

The overall objective of the Regional Private Sector Development Programme is to contribute to the gradual integration of CARIFORUM countries (Antigua and Barbuda, The Bahamas, Barbados, Belize, Dominica, Dominican Republic, Grenada, Guyana, Haiti, Jamaica, St. Kitts and Nevis, St. Lucia, St. Vincent and the Grenadines, Suriname and Trinidad and Tobago) into the World Economy and by so doing to enhance regional economic growth and by extension alleviate poverty. One of the specific objectives of the programme is to promote trade and export development among CARIFORUM States.

### **1.3 The Current State of Affairs**

Under the 10<sup>th</sup> EDF Regional Private Sector Development Program, Caribbean Export has a mandate for the development of a regional export strategy for CARIFORUM. At a regional consultation held in Barbados in early June 2014, stakeholders endorsed four sectors of export growth potential for CARIFORUM countries, and by extension the wider CARIFORUM region, and for which regional export strategies would be developed. This included:

**1. Agro-processing:**

Main Sub-Sectors:

- a. Specialty foods such as hot sauces and other sauces, jams & jellies, condiments and seasonings, etc.
- b. Semi-processed products (intermediate products) – e.g. pepper mash, juice concentrates, etc.
- c. Food & Beverage – canned food, juices and carbonated drinks, etc.
- d. Rum, spirits, and other alcoholic beverages

**2. Education Services:**

Main Sub-sectors:

- a. Higher Education Services – including post-secondary technical and vocational education services; and
- b. Other higher education services (i.e. those leading to a university degree or equivalent)

**3. Creative Industries:**

Main Sub-sectors:

- a. Creative industry goods such as jewelry, paintings, recorded music and film, etc.
- b. Creative industry services – music recording services, performance management services, film production
- c. Arts & Crafts

**4. Renewable Energy:**

Main Sub-sectors:

- a. Hydro-electric power
- b. Biomass
- c. Geothermal energy
- d. Wind power
- e. Solar energy.

Stakeholders at the regional consultation also agreed that:

1. Any regional export strategies would initially be limited to the above mentioned four broad sectors;

2. A study be conducted to map the global value chain for the above mentioned four sectors, with a view to identifying the challenges and constraints faced by CARIFORUM firms as well as their potential to enter the global value chain of the respective sectors;
3. The regional strategy development process focus on addressing the challenges, constraints, opportunities and weaknesses exhibited by CARIFORUM firms in entering the value chains of the respective sectors under consideration.

Research on opportunities for trading Education Services from CARIFORUM to selected Countries in the European Union, has found that there are possible opportunities based on the high cost of education in some European countries, the new business models in education, particularly in on-line learning which presents potential to tap into. In addition due to the ease of access to CARIFORUM markets by Europeans consideration must be given to study abroad, student mobility opportunities and other possible benefits of transnational education. Further, the research has shown that there are possible joint venture opportunities that should be explored. The tertiary education sector is extremely competitive globally and CARIFORUM must determine where its advantage lies in trading with Europe

## **2.0 Objective, Purpose and Expected Result**

### **2.1 Overall Objective**

The objective of this assignment is to articulate a regional export strategy for CARIFORUM institutions for Higher Education Services. The sector strategy will be based on mapping of the value chain for the Educational Services sector in select international markets with a view to identifying opportunities/possible impact for the Caribbean private sector, and to articulate a sector focused strategy for addressing the challenges and constraints faced by CARIFORUM Education institutions in entering the value chains.

The objective of the value chain analysis is:

- (1) To give a realistic indication of the EU and international export potential for CARIFORUM Higher Education products;
- (2) To give a realistic indication of the sustainable development potential (economic, social and environmental);
- (3) Analysis of export potential of CARIFORUM Higher Educational Services products and services;
- (4) To map the value chain(s) in order to get a clearer understanding of the value chain(s), its prospects and constraints;
- (5) To identify challenges and constraints faced by CARIFORUM Higher Educational Services in entering the value chains and identify ways to strengthen and expand selected positions along the value chain and to articulate a sector focused strategy;
- (6) to identifying opportunities/possible impact for the Caribbean private sector;

In addition to providing the framework for development of the export strategy the value chain analysis should engage stakeholders and strengthen relationships and cooperation among them.

The mapping exercise will include:

1. A comprehensive mapping of the value chain for Educational Services sector in select international markets (Denmark, Estonia, Finland, France, Germany, Italy, Malta, Netherlands, Norway, Sweden, Spain and the United Kingdom) for the Education Services sector (higher education) including **actors** (i.e. service providers, exporters); **enablers**; **drivers** (public institutions and ministries); and **factors** (buyers, consumers, quality/standards, legal requirements, trade agreements, transportation/logistics, trends, etc.)
2. Identification of the market opportunities and potential for CARIFORUM educational service providers to take advantage of the opportunities, in particular the demand for certain courses and qualifications
3. Review programme mobility, student mobility and staff mobility between CARIFORUM and the above stated EU Member States
4. A road map for enhancing the competitiveness of Educational Institutions in entering the value chain in relevant markets of export interest and potential to CARIFORUM;
5. Review of the current tertiary education market and future trends:
  - a. Size of student pool disposed to study abroad;
  - b. structure of the tertiary education sector and its encouragement of study abroad;
  - c. fee levels and funding, loans and scholarships to support full fee paying and study abroad );
  - d. current trans-national education landscape
6. Stakeholder mapping and positioning of the different CARIFORUM providers of educational service with a view to determining their engagement, supply capacity, relevance, and position in each value chain;
7. Detailed strategies for addressing the challenges and constraints that CARIFORUM educational institutions face on entry into each value chain.

## 2.2 Project Deliverables

The consultant is expected to deliver the following results;

1. An inception report describing the methodology to be undertaken in completing the assignment and recommending how potential constraints to successful completion of the assignment will be handled;
2. Identification of specific market opportunities in the value chain for higher educational institutions within CARIFORUM. In addition recommendations should be made regarding institutions and programmes that can be enhanced to meet international demands. Specific interest should be placed on the local human resource training needs

in the engineering, oil and gas sectors and global needs for professionals in this industry for which training programs could be set up; and similarly in the IT industry, with particular reference to local and global needs for trained cyber security personnel.

3. Review and recommend enhancement of programme offerings within CARIFORUM institutions including how to improve their capacity to offer courses of study via flexible delivery methods; the aspect of the value chain that CARIFORUM Institutions should insert
4. Assess and provide recommendations on accreditation to increase exportability including with CAAM-HP for medical schools and with other globally accepted accreditation institutions for non-medical schools;
5. Assessment of possible joint ventures between and among CARIFORUM and European institutions to facilitate educational services exporting:
  - a. Recommendations on twinning arrangements for course and degree offerings;
  - b. Recommendations on possible marketing strategies including with partners having an African and Commonwealth footprint
  - c. Enhance visibility within European markets
  - d. Identification of potential partners
6. Detailed value chain maps for Higher Education Services including **actors** (i.e. service providers, exporters); **enablers**; **drivers** (public institutions and ministries); and **factors** (buyers, consumers, quality/standards, trade agreements, transportation/logistics, trends, etc.) in each selected market. The value chain maps should also clearly identify stakeholder positioning including their engagement, supply capacity, relevance, and position in each of the respective value chains;
7. Identification of student recruitment fairs and representative agents in markets of relevance to CARIFORUM institutions, and provide detailed explanations of the requirements for participating in the fairs;
8. Assess and provide recommendations to:
  - a. address the lack of a regional accreditation body within CARICOM
  - b. establish means of consultation with offshore schools on new trading possibilities as well as offshore accreditation
  - c. address the ability of statistical agencies to better collate services trade statistics
  - d. reduce the high cost of telecommunications to facilitate Mode 1 trade
  - e. encourage more interaction between educational institutions within CARIFORUM
9. A list of all CARIFORUM institutions and their currently levels of engagement in international value chains in the Educational Services sector;
10. A draft road map for enhancing the competitiveness of CARIFORUM institutions in entering the value chain for the Educational Services sector in selected markets of export interest and potential to CARIFORUM;

- a. A marketing strategy that complements the road map including strategic partnerships with global actors.
11. A detailed strategy and action plan for addressing the challenges and constraints CARIFORUM institutions face on entry into the value chain
12. A final report presenting findings on the research conducted and including the final versions of the value chain maps, and a detailed strategy and action plan (regional export strategy) including estimated costs to implement same.
13. Complete list and contact details of institutions/key contacts consulted.

### **3.0. Assumptions and Risks**

#### **3.1 Assumptions underlying the project**

The consultant hired can successfully and effectively deliver the scope of works outline in this TOR within the stipulated timeframe and that successfully meets CE's expectations.

The time frame allocation for the assignment is sufficient to complete the assignment for each of the four sectors.

Adequate data and information is available to undertake the research in the specified time period.

#### **3.2 Risks**

The general risk includes delays with data collection resulting from reluctance of the relevant stakeholders to share information or to complete the assessment exercise; or delays resulting from other causes.

## **4.0 Scope of the Work**

### **4.1. General**

#### **4.2. Specific Activities**

To achieve the expected results, the Consultant will, at a minimum, do the following:

1. Participate in an inception meeting with the Caribbean Export team to define, clarify, and agree on project parameters and expectations, including timelines, reporting, etc.;
2. Conduct desk, interviews and other research and or consultations based on the requirements in the TOR and necessary to effectively complete the assignment;
3. Develop draft value chain in selected market(s) for the respective sector under consideration;
4. Develop a Road-map for enhancing the competitiveness of CARIFORUM institutions trading in relevant higher education sectors;

5. Based on the value chain analysis Develop a comprehensive draft Regional Export Strategy and Action Plan for the respective economic sector;
6. Develop a marketing strategy for the sector and institutions identified including estimated costs;
7. Present initial findings on research phase to Caribbean Export Team for review and approval. The proposed structure to be used for the final report must also be presented and approved.
8. Once the draft final value chain analysis report has been accepted by Caribbean Export, facilitate a workshop with the identified key stakeholders to validate the value chain analysis.
9. Prepare a final value chain analysis report that reflects the comments and suggestions provided by the stakeholders.
10. Prepare a document highlighting recommendations, where Caribbean Export can address any of the bottlenecks identified in the value chain analysis within the medium term.
11. Finalize the sector strategy based on comments and feedback received from stakeholders.
12. Preparation and submission of final report including final version of (3), (4), and (5) above.

#### **4.3. Project Management**

##### **4.3.1. *Responsible body***

The Caribbean Export Development Agency will be responsible for the management and coordination of this project.

##### **4.3.2. *Management***

The Services Specialist will retain overall responsibility for the project and will report the performance of the project to the Executive Director.

#### **5. Logistics and Timing**

##### **5.1. Location**

The assignment is commissioned from Barbados but does not necessarily require physical presence in that country to execute the assignment.

##### **5.2. Duration**

The assignment is allocated thirty five (90) billable days per regional export strategy.

##### **5.3. Commencement Date and Period of Implementation**

Work is expected to commence by 15th September, 2014 and should be completed by 5<sup>th</sup> December, 2014.

## 6. Requirements

### 6.1. Personnel

#### 6.1.1 *Qualifications and Experience Required*

- A postgraduate degree in international trade, international business, international education or a related field.
- Demonstrable track record in global value chains and sector development similar to those outlined in TORs.
- Sound knowledge of the trade and development issues facing the Caribbean, in particular the export challenges for institutions within the region in the higher education sector.
- Experience working in development of export potential and capacities.
- Excellent presentation and communication (oral and written) skills
- Fluent in English, however ability to speak Spanish, French and/or Dutch would be an asset.
- Applicants must be nationals of or have a firm registered in an ACP (African, Caribbean and Pacific) country or in the European Union.

### 6.2. Required Documentation

The Applicant will at a minimum submit the following;

1. Examples of previous work done in this area
2. Proposal submitted which should include, at a minimum; company profile, understanding of the project and methodology, available experts and qualifications, timetable/ Gantt chart for activities and a detailed proposed budget
3. Proof of citizenship in the case of an individual or company registration if a firm.

## 7. Reports

### 7.1. Reporting Requirements

#### 7.1.1. Consultant will submit the following reports

- Inception Report: Presented within one week of contract signing and including an inception meeting with Caribbean Export to discuss the Report. This report will clearly outline the approach and methodology necessary for completing the assignment and any changes or suggestions agreed with Caribbean Export as relevant for successful completion of the assignment.
- Draft value chain map of the Higher Education Services sector identified above and including **actors** (i.e. service providers, exporters); **enablers**; **drivers** (public institutions and ministries); and **factors** (buyers, consumers, quality/standards, trade agreements, transportation/logistics, trends, etc.). The value chain maps should also clearly identify

stakeholder positioning including their engagement, supply capacity, relevance, and position in each of the respective value chains;

- A draft road map for enhancing the competitiveness of CARIFORUM institutions in entering the value chain for the respective sector in relevant markets of export interest and potential to CARIFORUM;
- A draft strategy and action plan for addressing the challenges and constraints CARIFORUM institutions face on entry into each of the respective value chains for the identified sector;
- A Final Report presenting findings on the research conducted and including the final versions of the value chain maps, and a detailed strategy and action plan (regional export strategy) including costs, as well as a list of all CARIFORUM institutions currently engaged in the value chains in the respective sectors in consideration.

## **7.2. Submission & approval of reports**

7.2.1. The reports and deliverables as referred to above must be submitted to the Services Specialist. All reports must be submitted in English in electronic format (Microsoft Word). The final report must be submitted in electronic format along with two (2) hard copies.

7.2.2. The Services Specialist is responsible for communicating the approval of the draft and final reports/strategies/action plans.

## **8. Monitoring and Evaluation**

### *8.1. Definition of indicators*

Performance on the project will be measured by satisfactory completion and timely submission of the deliverables outlined in Section 4.2 and as outlined within the work plan. Feedback, other than acceptance, on each submitted Progress Report is not a requirement for the continuation of the project. The Contracting Authority will provide feedback to the consultant within five (5) working days of receipt of the final report.

### *8.2. Special requirements*

None