

CEDA Export Strategy Higher Education

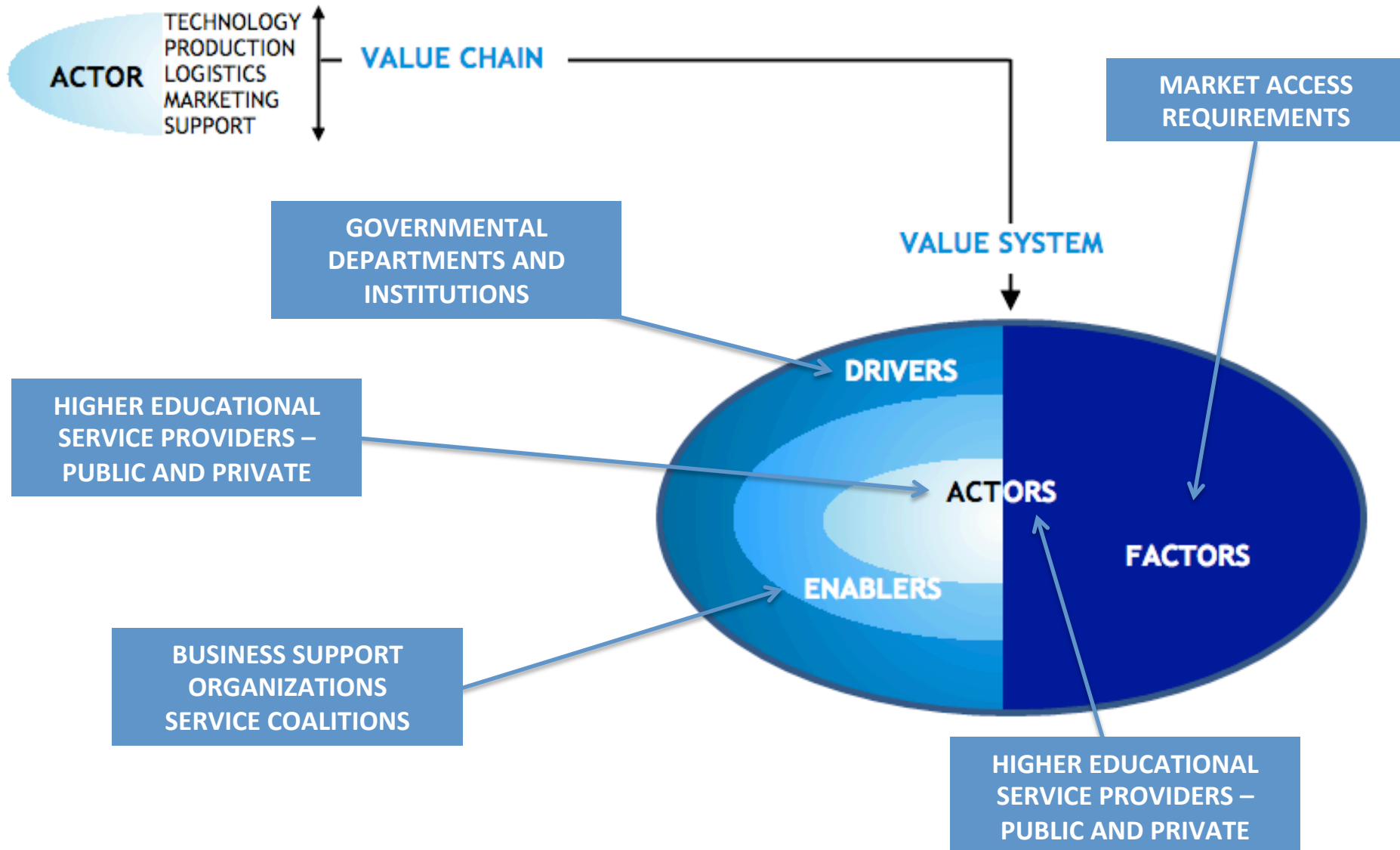
Interim Results

Supply side

- Fact finding mission – **Trinidad, Grenada, Barbados, Jamaica**; interviews & discussions with stakeholders in the value system; individual and groups
- Types of higher education institutes
 - Public universities – **dominance of UWI; lack of MI**
 - Community colleges – **no international agenda**
 - Private institutes (business, medical, etc) – **niche marketeers**

All require different strategies and should approach different segments
- **Dilemma** between public mandate and commercial approach
- Retracting (financial) role of governments force public institutes to think business – **low motivation**

Scan on value chain; value system



Key results- value chain - actors

- **TECHNOLOGY** – there is **sufficient research capacity and expertise** for development of specialized niche courses
- **EXECUTION** – there are **insufficient incentives** to attract world class faculty from abroad; only a few institutions have **modern teaching** facilities
- **LOGISTICS** – **travel to/from and inside region is expensive**; campuses seem to have adequate housing and other facilities
- **MARKETING** - there is a **serious lack of marketing expertise**; marketing departments are **communication** departments; MI is practically non existent; the bigger institutes **rely on agents** for “selling”
- **SUPPORT** – with the exception of very few, none of the institutes interviewed consider **student support (tutoring, etc.)** as an important purchasing decision factor.

ACTORS

	DEVELOPMENT	EXECUTION	MARKETING	
MINDS	CURRICULUM DEVELOPMENT 6,7	QUALITY OF FACULTY COURSE DELIVERY 7,2	STRATEGIC MARKETING AND POSITIONING 3,2	5,7
MONEY	INVESTMENTS IN PROGRAM DEVELOPMENT/INNOVATION 4,9	INVESTMENT IN ON LINE TOOLS, SMART ROOMS ETC. & SUPPORT SERVICES 4,7	MARKET RESEARCH & PROMOTIONAL BUDGETS 2,8	4,1
(ALMA) MATER	ECOSYSTEM DEVELOPMENT, EFFECTIVENESS OF ALLIANCES 4,4	POSITIONING, ALUMNI ENGAGEMENT 3,9	REPUTATION MANAGEMENT ALUMNI NETWORK 3,3	3,9
METHODS	ACCREDITATIONS INTERFACE WITH COMPANIES 6,3	PEDAGOGY, EVALUATION, SUPPORT SERVICES 5,9	FAIRS, AGENTS, ROAD SHOWS EXCHANGE PROGRAMS 4,1	5,4
MATERIALS	ONLINE DELIVERY & EVALUATION PLATFORM 4,7	TRAINING & PRACTICE FACILITIES 5,3	WEBSITE, SOCIAL MEDIA BROCHURES 6,3	5,4
	5,4	5,4	4,0	

4,9

ENABLERS

	DEVELOPMENT	EXECUTION	MARKETING	
REPORTS	SCANS, TRENDS, UPDATES 2,8	FEEDBACK ANALYSIS COMPETITIVE GAUGES 3,1	MARKET INTELLIGENCE CUSTOMIZED INFO 2,6	2,8
REPRESENTATION	INDUSTRY/ACADEMIA/ POLICY INTERFACE 4,4	ADVOCACY ENHANCING COMPETITIVENESS 3,6	INTL SERVICES COALITIONS INTERNATIONAL PRESENCE 2,7	3,6
READINESS	INDUSTRY EXPERTISE SECTOR DEVELOPMENT 3,2	PRESENCE ACROSS ACTORS IN EDUCATION 4,3	SECTOR POSITIONING SECTOR BRANDING 3,0	3,5
RANGE	DEVELOPMENT AS AN EDUCATION HUB 3,1	VOCATIONAL WORKSHOPS BEST PRACTISE EXCHANGE 5,2	EDUCATION MISSIONS CAREER FAIRS 4,0	4,1
ROBUSTNESS	DONOR MANAGEMENT REVENUE SOURCES 3,2	SERVICES PORTFOLIO DELIVERY TEAM 2,9	COALITION BRANDING MEMBERSHIP RECRUITMENT 3,1	3,1
	3,4	3,8	3,1	

3,4

DRIVERS

	DEVELOPMENT	EXECUTION	MARKETING	
INCENTIVES	INCENTIVES TAX BREAKS ON DEVLPT ACTIVITIES 3,3	SCHOLARSHIPS EDUCATIONAL SOFT LOANS 5,0	CO FINANCING OF TRADE MISSIONS/FAIRS/ BRANDING 2,6	3,6
INFRASTRUCTURE	ESTABLISHMENT AS AN EDUCATIONAL HUB MASTER PLANNING 4,4	TRANSPORT, ACCESSIBILITY, CIVIC SERVICES 5,8	CULTURAL & SAFETY IMAGE ICT STRUCTURE 4,7	5,0
INITIATIVE	INNOVATIVE EDUCATION POLICY 3,7	EDUCATION ECOSYSTEM VISA PROTOCOLS 4,4	COUNTRY BRANDING AS EDUCATION HUB 2,8	3,6
INSTITUTIONS	EDUCATIONAL/ RESEARCH/ CULTURAL IINSTITUTES 6,0	LEGAL FRAMEWORK FOR EDUCATION, DIPLOMAS 7,3	EDUCATION & SKILLS PRICING MECHANISM 4,1	5,8
INSTRUCTION	PRIMARY AND LANGUAGE EDUCATION 5,3	STUDENT & FACULTY FRIENDLY ENVIRONMENT 6,4	STUDENT EXCHANGE FACILITATION 5,6	5,8
	4,6	5,8	3,9	

4,8

Key results – MRI Scan

- ACTORS

- Quality of faculty, course delivery
- Websites, social media, brochures

- ENABLERS

- Vocational workshops
- Interface academia/government/policy

- DRIVERS

- Legal framework for education
- Student and faculty environment

- ACTORS

- Strategic marketing, positioning
- Market research
- Reputation management, alumni network

- ENABLERS

- Market scans, trends, updates, customized info
- Market intelligence
- International presence

- DRIVERS

- Co-financing of trade promotion activities
- Tax breaks, incentives
- Country branding

Comments based on MRI Scans

- Overall CI-score of **6.608 is extremely low** (Maslov)
- **Enablers** score uncharacteristically low
- High medians in all boxes: **low level of consensus**
- One consensus: **lack of marketing skills**
- Country branding requires a **concerted effort** of actors, enablers and drivers – importance of **value system**

Key results – FSI Matrix

Solution design/constraint lifting

The FSI matrix is a tool for solution design/constraint lifting, preventing that efforts are wasted by trying to do everything. The matrix uses three criteria to prioritize suggestions from stakeholders, based on the **results of the MRI scan**

- 1. Feasibility**
- 2. Speed**
- 3. Impact**

Solutions proposed	Feasibility	Speed	Impact	FSI Score	Priority
Best practices workshops – “education as a business”	8	6	4	192	7
Pilot Marketing project in selected segments	7	5	8	280	4
Development of Export Marketing Plans	8	4	7	224	6
Agent recruitment for the region	10	7	8	560	3
Skilling the marketing departments	6	4	8	192	7
Strategic Conference for Stakeholders to create buy in for regional strategy	10	7	8	560	3
MI Services portal/ portfolio	10	7	9	630	2
BSOD for the enablers (service coalitions) in this region	6	4	8	192	7
Strategic Conference – Prepare Business Proposal to Governments	8	9	10	720	1
Establishment of membership based Trade Association for advocacy	6	4	5	120	8
Develop regional exports as a step up	5	6	8	240	5

First impressions– Demand side EU

Interviews with potential B2B partners in **Norway, Denmark, Sweden, Finland, Estonia**

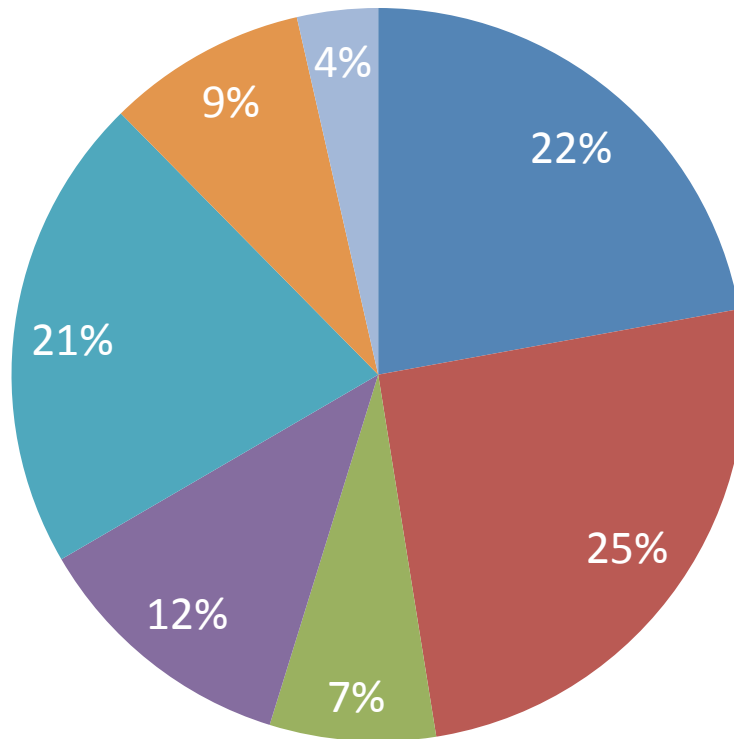
- **AFFORDABILITY** - Higher education is a public good, **generally free of charge**. Systems of financial support are at a relatively **high level**.
- **PROGRAMS** – Students willing to travel to the Caribbean for **exchange programs**, not for full degree courses
- **EXPOSURE** - Strong encouragement from universities **to get exposure to a different culture** - better global citizens. **From 3S TO 3E**
- **DECISION MAKING UNIT** – Decentralized education system: **professors have substantial autonomy**, professors are critical partners in exploring partnerships and collaboration opportunities.
- **ALLIANCES** – Create **Centers of Excellences** focusing on niche areas, that host and home university alike can customize a program for.
- **UNIQUE VALUE PROPOSITION** - Incentivize through **research potential** in areas like maritime academics, tropical flora/fauna, climate change management, athletics, water management etc through seminars, knowledge exchange programs, white papers etc.....

Research - excellence



Comparative issues– students*

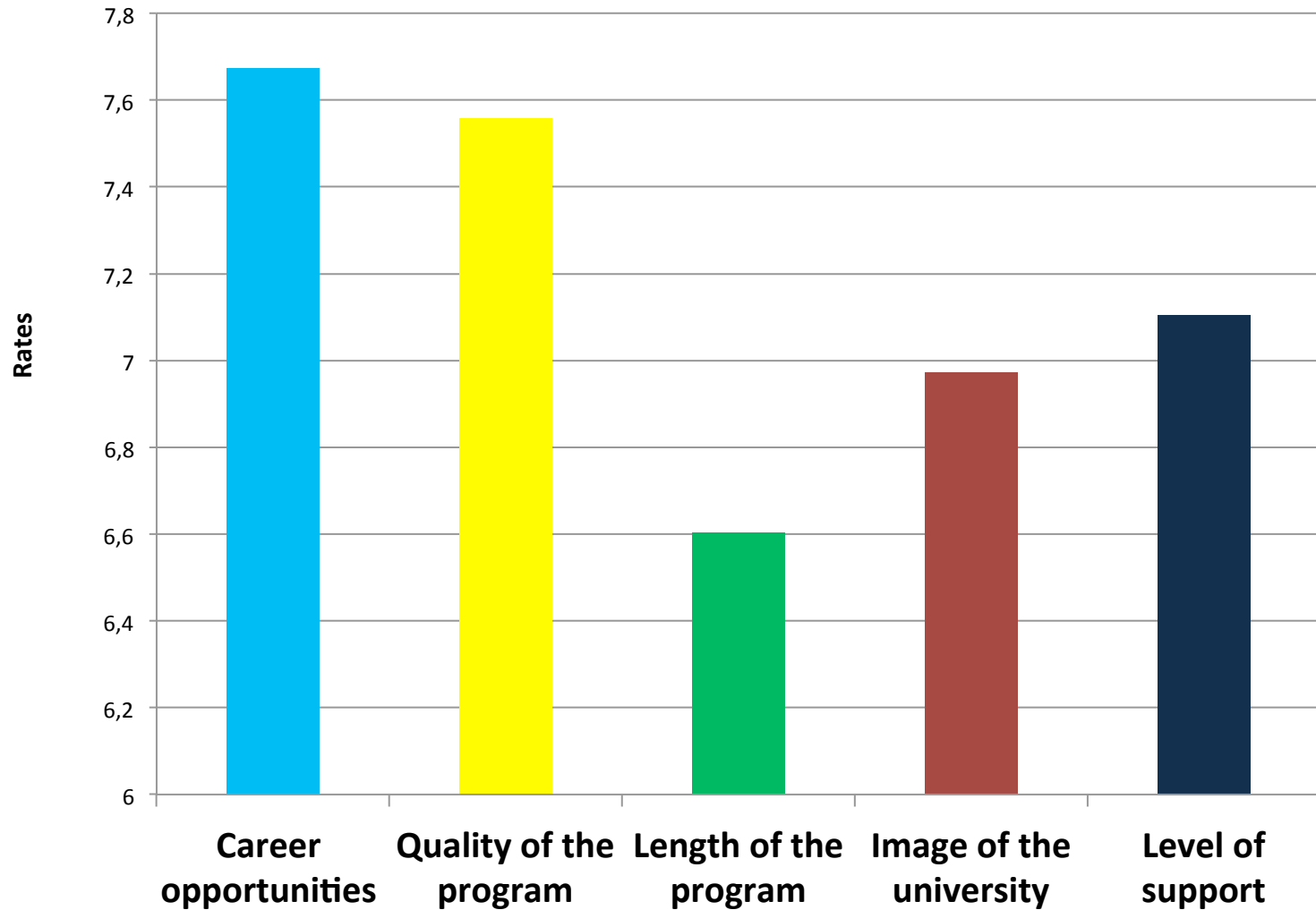
*survey amongst 200+ university and college students in The Netherlands from Economics & Marketing, Communication, Media & Design, Healthcare,, ICT, Art, People & Society, Education, Applied Science, Law, Neuroscience, Sports, Languages, Technique



Costs	25%
Program	22%
Language of country	21%
Culture of country	12%
Distance from home	9%
National security	7%
Other	4%

Customer values – students*

Average of the five elements



First impressions – Africa

Interviews in **Rwanda, Tanzania, Kenya, Botswana**

- Public universities are dominant in Kenya & Tanzania, while Rwanda and Botswana have more private universities.
- There is **tacit knowledge** in the region about Caribbean universities and some of the values they carry.
- Interviewed institutions **willing to engage** in partnerships with focus on **medical and science based** degrees
- Many institutions ready to send students abroad but **need reasonably priced degree courses.**
- Regional public universities that offer parallel degrees to privately sponsored students **are highly motivated.**
- **Scholarships for external degrees** are availed by governments, development/donor agencies, foundations and other private sponsors.
- Immature market: **only a few institutes** identify, prepare and place students in foreign universities

First impressions – Latin America

Interviews with universities, government entities and Student Associations.

Colombia, Peru, Ecuador

From universities perspective:

- **General lack of information on Caribbean Universities**, except for Universities in Cuba and DR (one University in Bogotá)
- Universities **proactively looking for well positioned universities** (ranking lists) for cooperation agreements. Experience, programs, academic level faculty **main criteria** are main criteria
- **No initiatives from Caribbean Universities yet** towards cooperation
- Most of them are opening or reinforcing postgraduate programs (Masters, PhD) **to keep students** – anti force for student mobility.

From student's perspective

- The Caribbean is basically a **for fun destination (3S)**.
- Prefer well known universities in the USA or Europe, but admit that **due to the lack of information** they never think of the Caribbean as a potential place to study abroad.