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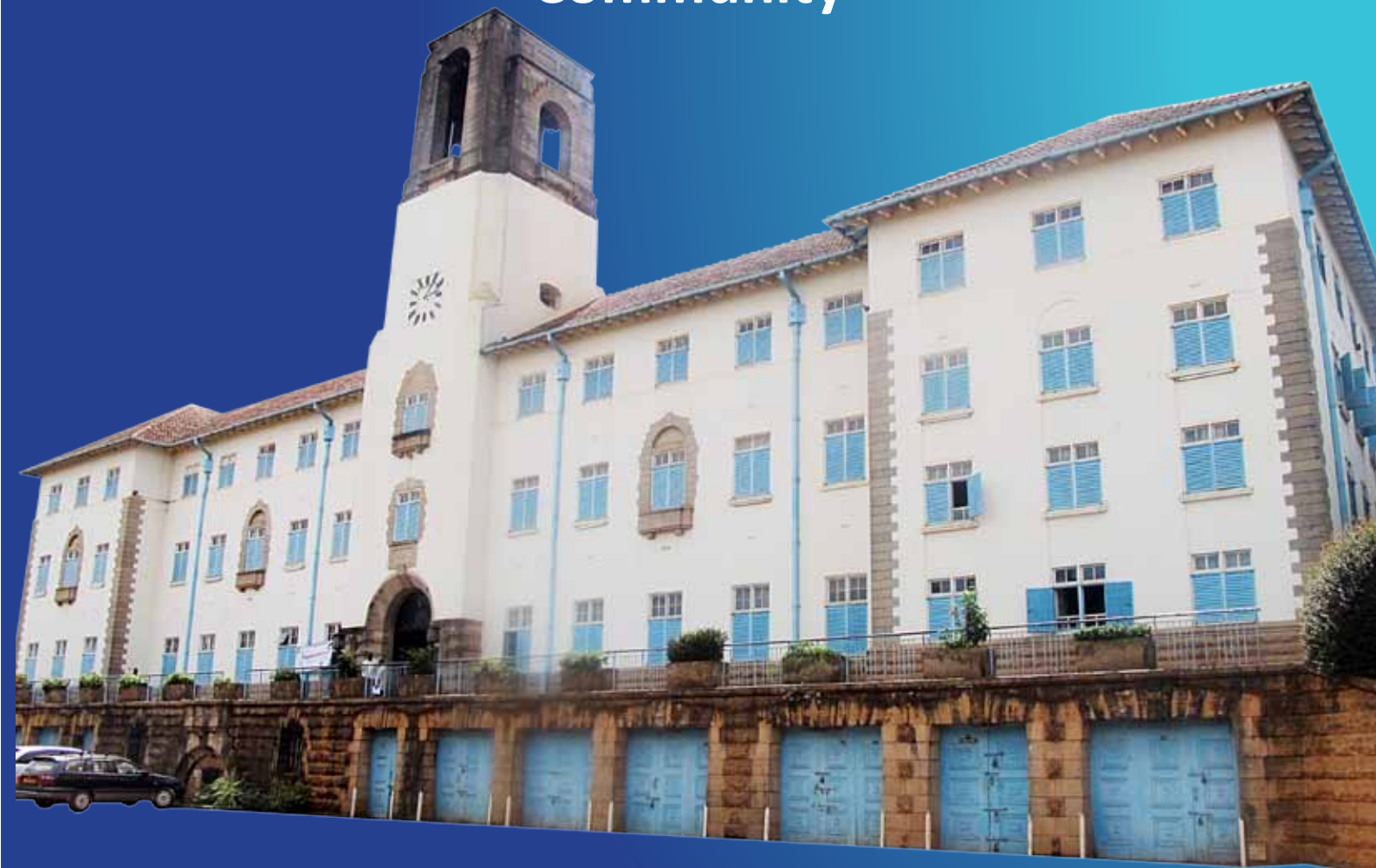
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RESEARCH SERIES No. 93

Opportunities, Challenges and Way Forward for Uganda's Trade in Education services within the East African Community



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JULY, 2012



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ABSTRACT

The reforms in the services sector have seen tremendous growth in the sector's contribution of GDP across all economies around the world. In Uganda, the share of services to total GDP is more than half in nominal terms. In this regard, with deeper regional integration among East African Community (EAC) partner states in both goods and services, it is important for Uganda to identify and expand the services sector in which it has a competitive advantage within the region. Thus, this paper tries to establish the country's competitive services sector by critically analysing the Strengths-Weaknesses-Opportunities and Threats (SWOT) based on key quality indicators and factor cost at secondary and university levels. These include student-teacher ratio, tertiary ranking, foreign student enrolments and wage cost respectively.

The paper identifies secondary and university education as key services sector of the economy that would best derive the gains of services liberalisation within the EAC. Uganda's competitive advantage in this sub-sector is supported by its university ranking, tuition and related costs, and quality index for the secondary education. It is also notable that Uganda is emerging as a major regional player in sub-Saharan Africa in terms of foreign student enrolments.

Notwithstanding Uganda's remarkable progress, there are some challenges that still affect the country from making further progress in the development of the education services trade including limited capacity of the regulatory body in terms of staffing and funding to ensure quality. Others include limitation to entry of regional students, lack of mutual recognition for some qualifications among partner states, limited funding and training facilities at tertiary institutions, and lower remuneration to teachers/lecturers at both secondary and university level compared to some regional partners.

The policy measures that would promote, sustain, and enhance Uganda's education services exports within the region would include: increasing funding for research to universities to enable innovation and ranking of the institutions. Unilateral removal of the regulations limiting entry of international students in the EAC Annex on Free Movement of Persons, to increase the inflow of students in its tertiary and secondary institutions. Eliminate the requirement of work permits for citizens of EAC partner states with professional qualifications and skills such as legal practice, medicine, Information Communication and Technology (ICT), engineering, accounting and auditing, architecture and research. Uganda needs to influence the process of mutual recognition of academic qualifications. Strengthen the capacity of the national regulating body through increased funding and staffing. The universities also need to promote online application for admission to ease the process of enrolment.

Key words:

University education, Secondary education, trade in education services and East African Community.

1. INTRODUCTION

The services sector forms an important component and growing proportion of gross domestic product (GDP) among several economies in both industrialised and developing or emerging economies. It accounts for about two thirds or more of GDP in OECD countries, and an increasing proportion in the poorest countries, now slightly above 40 percent of GDP (Vylder, 2007). For example, in Australia, education services related exports accounted for 36 percent share of total services exports, that is, equivalent to about AUS\$ 19.1 billion¹ in 2010. The East and South Asian countries account for more than 82.8² percent of Australia's export market.

In most non-oil producing sub-Saharan African countries, the services sector accounts for the largest part of the GDP contribution. The services are a critical determinant of economic growth, and trade in services can result in improved access of goods, lower prices and higher quality inputs for firms in the production process (Hoekman and Mattoo 2009). The provision of services such as clean water, effective sewerage, a stable supply of energy, and access to quality and affordable education, and health services is critical to increasing welfare and alleviating poverty. Services sectors, including education, telecommunication, energy, transport, health, and business services are important inputs into the production of goods and other services and hence influence productivity and competitiveness of a given sector of the economy. Thus, increasing the availability, affordability, and quality of these services is crucial for economic growth and poverty reduction in all developing countries (Brenton *et al.* 2010).

The global trade in professional trade in services is huge and increasing rapidly. This exceeded US\$270 billion in 2005 (Agarwal 2006). Developing countries have in the recent years made significant contribution to trade in professional services and there is scope to further increase this share even at regional levels. Trade in professional services is good – both for wealth creation and for employment growth within a given economy, creating a high wage employment. Uganda has a huge pool of qualified institutional manpower that would exploit such advantages in exporting professional services.

In Uganda, the share of services to total GDP grew from 45.4 percent in 2009/2010 to 52.4 percent in 2010/11 (MoFPED 2011). The major services sub-sectors hereto include, retail and wholesale trade, tourism, education, health, information and communication technology (ICT) and related services, financial services, water and sanitation, construction and engineering services and professional services. The services sector has had a direct and significant contribution to job creation, and provides crucial inputs for the rest of the economy. In 2010, the education services sector alone registered 11 percent contribution to the country's share of

1 See **Analysis of Australia's Education exports**. <http://www.dfat.gov.au/publications/stats-pubs/analysis-of-australias-education-exports.pdf> Visited on September 12th, 2011.

2 Ibid

total services. Although the services sector remains the dominant sector to GDP growth in the country, reliable statistics on the prospective services sectors of the economy remains a challenge. In the education sector, for example, international student enrolment has been growing both at secondary and university levels. However, with the available data it is difficult to discern the number and value of income registered/recorded in this subsector as exports. It is also imperative to note that, trade in services and hereto education services offer dynamic new opportunities for exports. However, too often trade in services are either overlooked as a source of export diversification, with trade policies focusing solely on goods. Exports of services are of paramount importance for Uganda being a land-locked economy for which the opportunities to competitively diversify into the export of manufactures (goods) is more limited. The situation is exacerbated by the prevailing costs disadvantages in terms of energy, transport, technological innovation and other non-tariff barriers associated with goods trade.

It is against this background that this paper identified education as one among the major services sectors of the economy that would best derive the gains of services liberalisation within the EAC. The paper also highlights the various service sectors the EAC partner states have scheduled in their commitments, identifying existing opportunities and challenges, and outlining possible remedies for potentially competitive sub-sector for Uganda's economy. The emerging policy issues are expected to influence the policy mind set within the country to recognise trade in services as a major avenue for improving the country's terms of trade.

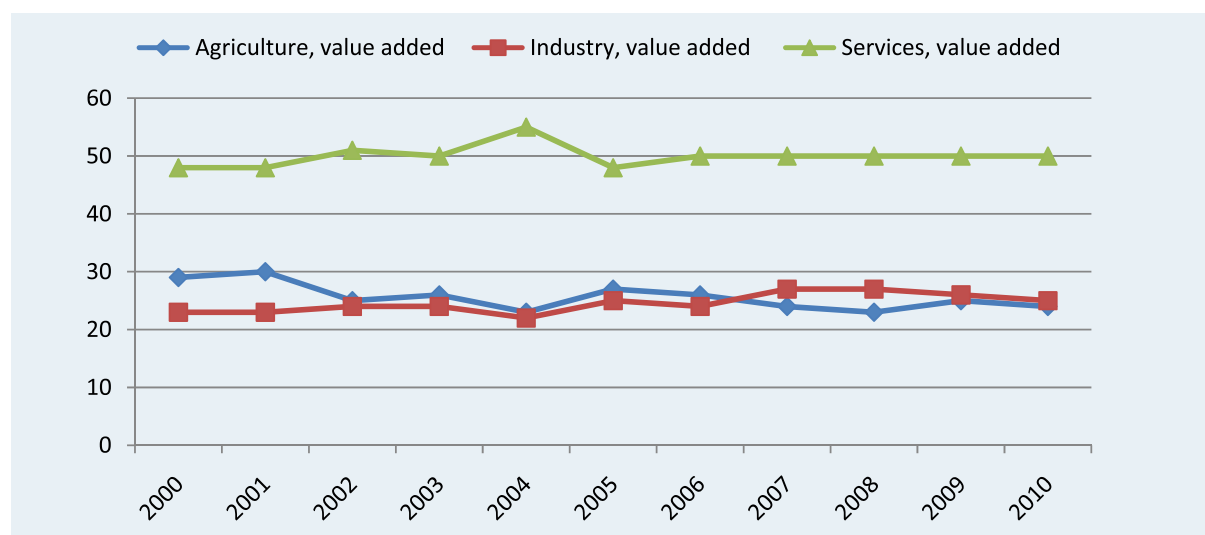
Using descriptive approach based on the Strengths-Weaknesses-Opportunities and Threats (SWOT) analysis, this paper focuses on a number of parameters to identify the competitive advantage in form of its strengths and opportunities for Uganda in providing education services exports within the EAC region and neighbouring countries. These parameters include the tuition fees structure, university ranking, and wage and quality index for secondary education. The paper further identifies Uganda's weakness and threats in form of challenges that need to be given attention for Uganda to fully benefit from its competitive advantage within the education sub-sector in the EAC region.

The rest of the paper is structured as follows: Section 2 highlights the sectoral composition of the Uganda's services sector. Section 3 reveals the regional member countries' service structure. The comparison of Uganda and other EAC member's Education Services is illustrated in section 4 of the paper. The EAC member countries' commitments in the services sector are discussed in section 5. While section 6 and 7 highlight the opportunities and challenges for Uganda's education services sector respectively. Lastly, conclusion and emerging policy options are highlighted in section 8.

2. SECTORAL COMPOSITION OF SERVICES SECTOR IN UGANDA

The services sector in Uganda plays a major role in terms of GDP contribution and employment. The contribution to GDP has been above 45 percent in the last ten years (Figure 1). The rapid growth of services share to GDP in the last decade is largely attributed to the liberalization of major services sectors including telecommunications, transport, education, hotels and restaurants; and high FDI investment inflows into the country. The sector has been growing at an average annual rate of about 9 percent, significantly faster than the traditional sectors of agriculture at 2.8 percent, and comparable to industry at 8.8 percent (MoFPED 2011). In fiscal year 2004/5³ estimates show that Uganda received US\$32 million (equivalent to Ushs 51 billion) from foreign students' payments, according to statistics from Uganda Revenue Authority (URA), putting education services exports as the fourth highest foreign exchange earner for Uganda.

Figure 1: GDP Composition by Sector (%)



Source: World Development Indicators, 2012. www.databankworldbank.org

In terms of individual services subsector contribution to GDP, wholesale and retail services account for the largest average proportion of 14.2 percent, followed by construction at 12.1 percent, transport and communication at 6.5 percent, and subsequently education at 6 percent for the last six years (see Figure 2). This implies that the pattern of GDP performance in the services sector is more driven by the wholesale and retail services and construction subsectors. Although the construction and wholesale and retail services dominate the services to GDP contribution, these sectors are not feasible exportable sectors.

The education services' contribution to GDP declined from 7 percent in 2006 to about 5.2 percent in 2010. This could partly be mathematically attributed to the growth in the share of

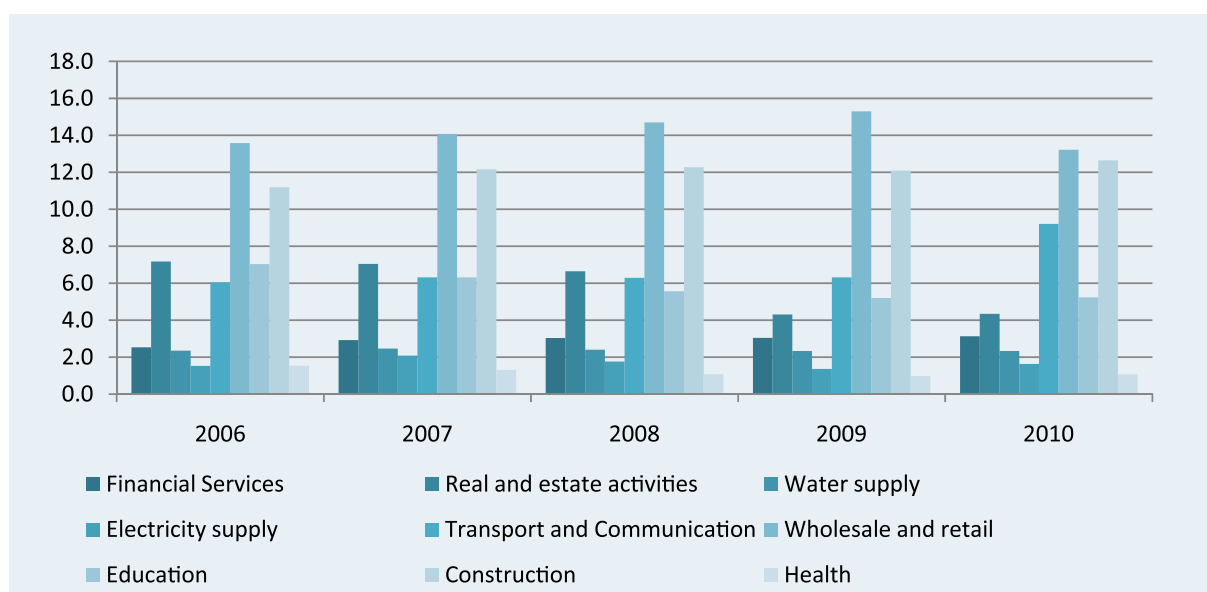
3 See the New Vision news paper of 23rd October, 2007: <http://allafrica.com/stories/200710240058.html> visited on 28th July, 2011.

the transport and communications subsector to GDP which is largely an informal subsector and unsustainable for GDP growth.

Additionally, the other sub-sectors such as wholesale and retail, as well as real and estate activities contribute to a higher share of GDP in the services sector. However, these subsectors are mainly non tradable and the kind of economic activity therein are largely consumptive in nature. In addition, these subsectors do not attract foreign earnings which would improve the country's TOT. It is imperative to note that the education subsector remains the best option as Uganda's services cross border tradable subsector.

The education services sector presents a potential exports avenue for Uganda given that it is not affected by the challenges faced by goods exports. The non-tariff barriers including documentation requirements, border post delays, road blocks and bribery, technical barriers, sanitary and phytosanitary measures, and among others are non-existent to the services cross border trade.

Figure 2: Percentage share of GDP at current prices



	2006	2007	2008	2009	2010
Financial Services	2.5	2.9	3.0	3.0	3.1
Real and estate activities	7.2	7.0	6.6	4.3	4.3
Water supply	2.4	2.5	2.4	2.3	2.3
Health	1.5	1.3	1.1	1.0	1.1
Electricity supply	1.5	2.1	1.8	1.4	1.6
Transport and Communication	6.0	6.3	6.3	6.3	9.2
Wholesale and retail	13.6	14.1	14.7	15.3	13.2
Education	7.0	6.3	5.6	5.2	5.2
Construction	11.2	12.2	12.3	12.1	12.6

Source: Uganda Bureau of Statistics, Statistics Abstract, 2011

Figure 3 indicates that Uganda's services exports are closely linked to the overall GDP performance. This is contrary to other partner states where services exports are not significantly linked to GDP performance as shown in Figures 4-6. This relationship suggests that, the pattern of Uganda's GDP performance is highly influenced by the trend in services exports for Uganda compared to other partner states within the EAC.

Figure 3: Uganda's GDP and Services Exports (Millions of US\$)

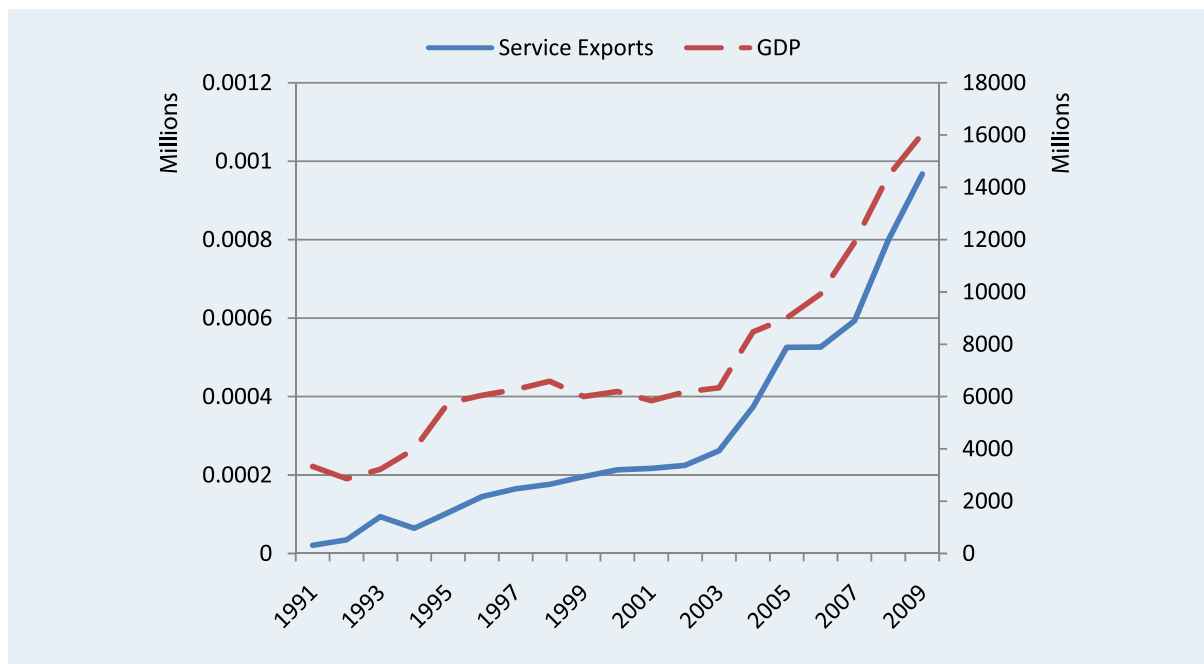


Figure 5: Kenya's GDP and Services Exports (Millions of US\$)

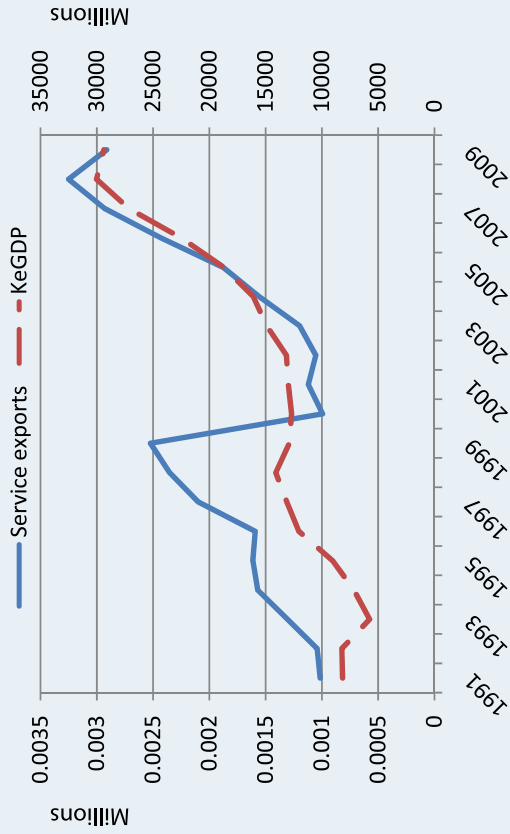


Figure 4: Tanzania's GDP and Services Exports (Millions of US\$)

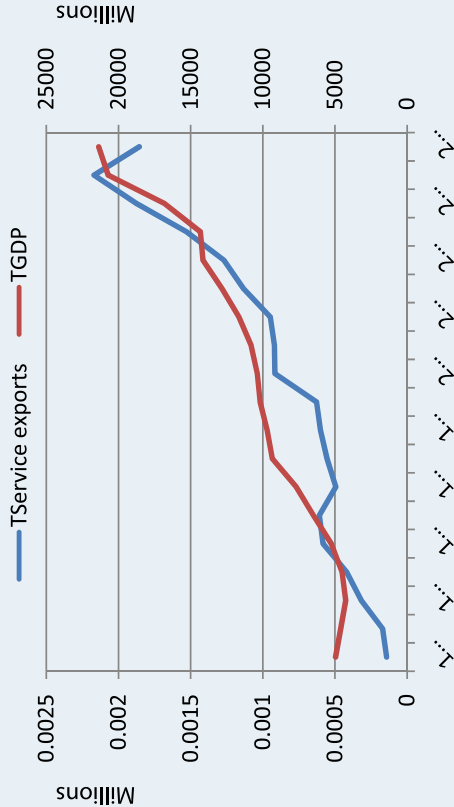


Figure 7: Rwanda's GDP and Services Exports (Millions of US)

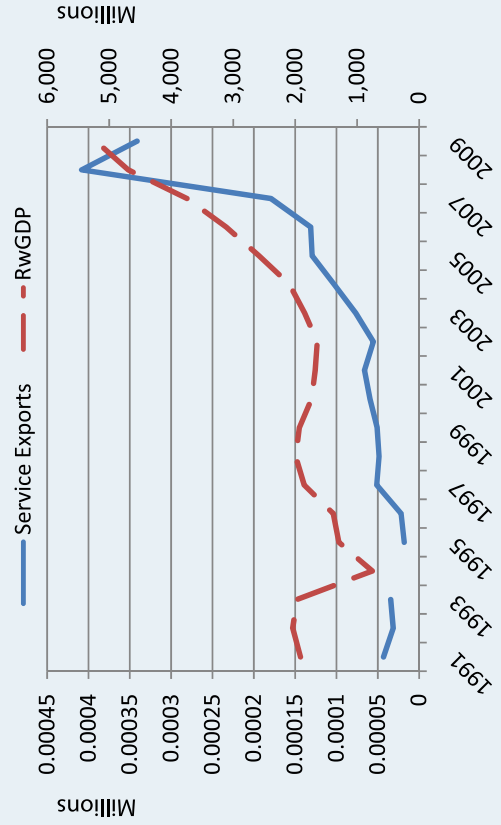
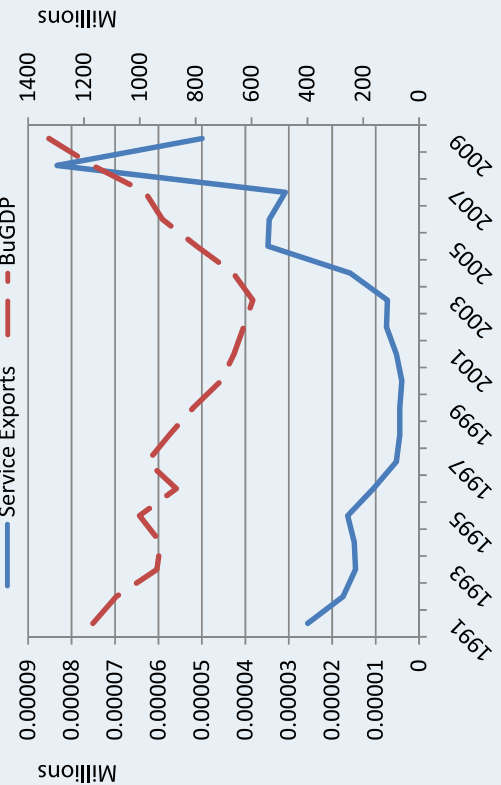


Figure 6: Burundi's GDP and Services Exports (Millions of US\$)

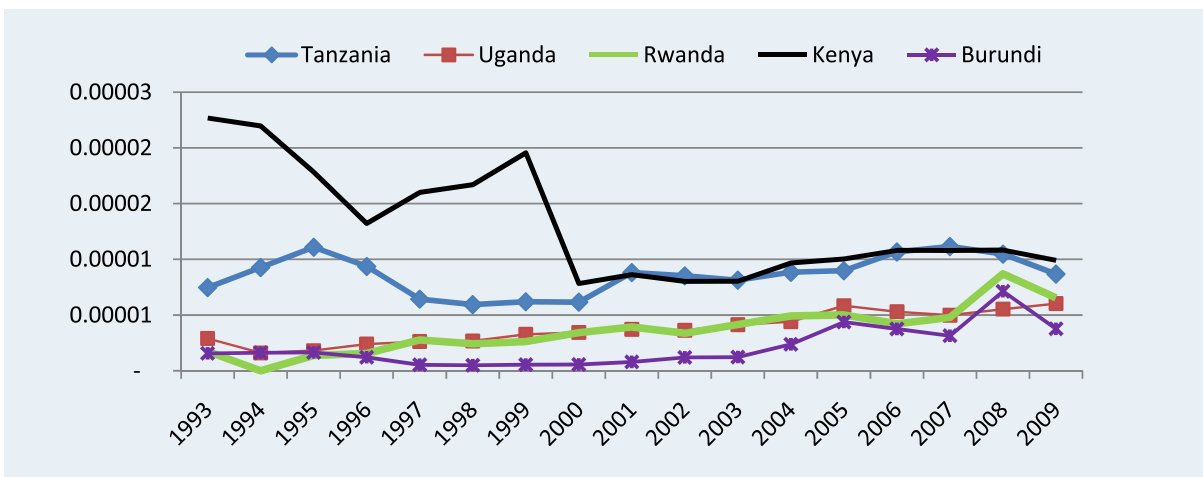


Likewise, Figure 4 and 5 for Tanzania and Kenya have slightly a similar pattern of services export relationship to GDP growth. However, Uganda's case is much more correlated implying that services exports have direct influence to GDP growth, thus a need to promote the sector.

3. REGIONAL MEMBER COUNTRIES' SERVICE STRUCTURE

This section draws a comparison of the services sector exports to GDP and its growth rate among EAC partner states. Figure 8 suggests that services exports before service liberalization in EAC varied among partners states for the last two decades, with Kenya and Tanzania recording higher growth rate before 1995 unlike the other partner states including Uganda, Burundi and Rwanda that underwent civil conflict and period of recovery. Uganda liberalised only the services sectors in 1995 under the WTO GATS. These include tourism, travel and related services (hotel and restaurants, travel agents and tour operators) and telecommunication services excluding video and audio broadcasting services. The figure 8 also suggests that by 2009 when the five partner states signed the EAC Common Market protocol that entered into force on 1st July, 2010 and set the first stage to services liberalization in the region, the trend of services exports for Kenya and Tanzania were dropping. In 2009, unlike for Uganda; the rest of the EAC partner states registered an inverse growth in services exports (Figure 3-7).

Figure 8: EAC Partner State's Service Exports to GDP (%)



Source: UNCTAD Statistic Handbook, 2010

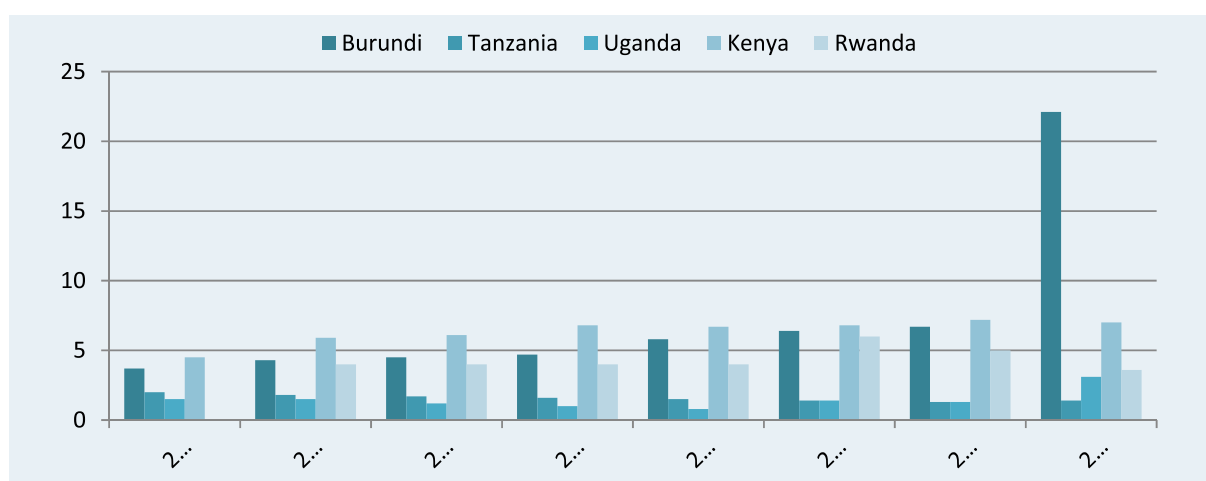
Although Uganda's growth in services exports of GDP has been resilient to external shocks compared to those of other regional partner states, the country's budget allocation to one of its major services sector which is education remains the least among that of other EAC partner states specifically Kenya and Tanzania (given the available statistics). Table 1 indicates that in the past four financial years from 2007/8, budget allocation to the education sector on average was 16.1 percent compared to Kenya's 26.7 percent, and Tanzania's 19 percent on average between 2008/9 and 2009/10.

Table 1: Education Sector Budget Allocation among EAC partner states (%)

	2007/8	2008/9	2009/10	2010/11
Uganda ⁴	16.8	15.4	15.3	16.8
Kenya ⁵	27.4	26	26.7	26.7
Tanzania ⁶		19.4	18.5	

Likewise, Uganda's expenditure of GDP in the education sector is among the lowest in the region with exception of Tanzania. The period between 2002 and 2008, Uganda spent less than 2 percent of GDP in the education sector not until 2009 when it rose to 3.1 percent.

Figure 9: Education Expenditure of GDP among EAC partner states (%)



	2002	2003	2004	2005	2006	2007	2008	2009
Burundi	3.7	4.3	4.5	4.7	5.8	6.4	6.7	22.1
Tanzania	2.0	1.8	1.7	1.6	1.5	1.4	1.3	1.4
Uganda	1.5	1.5	1.2	1.0	0.8	1.4	1.3	3.1
Kenya	4.5	5.9	6.1	6.8	6.7	6.8	7.2	7.0
Rwanda		4.0	4.0	4.0	4.0	6.0	5.0	3.6

Source: EAC Secretariat Statistics, 2011

Kenya, Rwanda, and Burundi spent more than 5 percent of their GDP to the sector. Burundi's expenditure rose from 6.7 percent in 2008 to 22.1 percent in 2009. This trend suggests that if Uganda is to enhance the development of the education services as its major exports, there would be a need to increase investment in the sector by more than 10 percent to the level of Kenya's sector budget ratio of GDP.

4 GOU MoFPED Background to the Budget, 2007/08 -2010/2011

5 GOK MoF Budget Outlook Paper, 2007/08-2010/2011

6 GOURT MOFEA Background to Budget and Medium Term Framework 2009/10-2011/2012

4 COMPARISON OF UGANDA AND OTHER EAC MEMBER'S EDUCATION SERVICES

In comparison of Uganda's education services with those of regional partner states, parameters of comparison used include key quality indicators such as the continental and global ranking of tertiary institutions (particularly Universities), the teacher student ratio for secondary, and the competitive indicator based on tuition fees and wage structures. Other parameters were not included due to limited statistics among all partner states in the subsector.

Stakeholder consultation with Uganda National Council for Higher Education revealed that the attraction of regional students to Uganda's secondary schools and universities is historical. This is attributed to the quality of education (see Table 2) and the language of instruction in Uganda's education system. Likewise, the lower tuition structure, as well as the university rankings puts Uganda at a much better competitive position compared to other regional partner states. According to the National Council for Higher Education, foreign student entries in the country have been growing at an average rate of about 7 percent annually.⁷ Table 2 suggests that Uganda has the highest university enrolment in the region. In 2006/7 and 2007/8 academic years, it registered a total of 162,411 and 117,084 students respectively compared to Kenya's 91, 541 in 2004/5 and 117,057 for Tanzania in 2009/10. According to a paper presented in October, 2007 in Switzerland at the World Export Development Forum, Kenya remains the leading source of international students in Uganda, contributing over 60 percent at secondary level and 71 percent at university level.⁸ Tanzania follows with 16 percent and 12 percent respectively. Other sources of international students include the Democratic Republic of Congo, Congo-Brazzaville, Burundi, Rwanda and Sudan. A baseline survey conducted by the Uganda Export Promotion Board (UEPB) in March 2005, observed that most of the foreign students come to Uganda targeting specific courses.⁹

University ranking

In reference to the University rankings in the region, Makerere University in Uganda takes the 10th position in Africa (Table 2) with an estimate of 34,383¹⁰ students of which about 1,893 are international students from regional states including Kenya, Tanzania, South Sudan, Democratic Republic of Congo, Congo-Brazzaville, Burundi, and Rwanda. Unlike in Tanzania, the University of Dar es Salaam the highest ranked at 34th position in Africa only has about 1,121 international students of a total of 17,098 student population registered in 2007/2008. Whereas in Kenya, the University of Nairobi, the top ranked institutions at 27th position in Africa and the 2nd in the region, enrolled 32,974 students in the academic year 2004/2005, statistics

7 http://www.studyinuganda.com/index.php?option=com_content&task=view&id=121 visited on 12th Sep, 2011

8 See Uganda: Government to Earn \$60 Million From Foreign Students Annually, <http://allafrica.com/stories/201009280119.html>

9 See Ibid

10 See Uganda Bureau of Statistics (UBOs), Statistics Abstract, 2010, p.113 www.ubos.org/onlinefiles/uploads/ubos/.../2010StatAbstract.pdf visited on 31st July, 2011

on foreign students are not available. Likewise, Strathmore University Nairobi ranked 38th in Africa also in Kenya, only had a student population of about 4,677 and the National University of Rwanda ranked 45th in Africa has a student population of 10,657. The pattern of foreign student enrolments and university rankings link quite well given that students would seek for institutions with repute within the continent, as well as at the global level. Institutions with better rankings over the years tend to attract more students both at local and international level.

Table 2 indicates that the university enrolments are growing over the years within the region. However, these trends prove a significant challenge to the quality of education especially with stagnant growth in the facilities, as well as human resource capacity. Thus, a need to create constituent colleges, provide more facilities to accommodate the growing student population at major university campuses. One important approach to address this rapid increase in enrolment is to develop additional distance education programmes especially for lower-income students or those who would need to work while undertaking higher education courses through computer assisted education.

Table 2: University Enrolment by Country, Top Universities and Ranking

	No. Universities	2004/05	2006/07	2007/08	2008/09	2009/10
Kenya	29	91,541 ¹¹	-	-	-	-
Uganda	35	-	162,411	117,082 ¹²	-	-
Tanzania	31	-	-	-	-	117,057 ¹³
Rwanda	11	-	-	-	-	29,779

Universities	Ranking (2011)**		Total Enrolment	Of which
	Africa World	Foreign		
Makerere University	10	1402	34,383(2006/07) ¹⁴	***1,893
University of Nairobi	27	3136	32,974 (2004/05) ¹⁵	
Dar es Salaam University	34	3415	17,098 (2007/08) ¹⁶	1,121
Strathmore University Nairobi	38	3704	4,677 (2010/11)	
National University of Rwanda	45	4596	10,657 (2009/10) ¹⁷	

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Notes: ** Source: Top Study Links, 2011¹⁸; *** Makerere University Planning Unit, 2011.

11 See Kenya Commission for Higher Education, <http://www.che.or.ke/enrolment.html> visited on 30th July, 2011

12 See Ibid. UBOs, Statistics Abstract, 2010, p.11

13 See Tanzania University Commission, <http://tcu.go.tz/uploads/file/Statistics%20for%202009-2010.pdf> visited on 29th July, 2011

14 See Ibid. UBOs p. 113

15 See Kenya Commission for Higher Education: <http://www.che.or.ke/enrolment.html> visited on 30th July, 2011

16 University of Dar es Salaam, http://www.udsm.ac.tz/about_us/facts.php visited on 28th July, 2011

17 See Ministry of Education Rwanda, Education Statistics December 2010. P.18

18 See. The ranking was based on size, visibility, research papers and scholars.

<http://www.topstudylinks.com/Top-Universities-in-Africa-tc1.aspx>

University Tuition Structure

Comparing the five major regional universities' tuition structures for a similar course for foreign students, Uganda's Makerere University tuition fees are significantly lower than those in the entire region. To illustrate this fact, the tuition fees per annum for a Bachelor of Commerce (BCOM) is about US\$ 1,464 well below fees for a similar program in major universities in other EAC partner states (Table 3). Although LLB course at the National University of Rwanda is costs less those in other regional Universities and more especially Makerere University's, the tuition structure of the course in Rwanda are quoted excluding functional fees. Therefore, Makerere would still prove competitive in the provision of LLB course, as well as civil and mechanical engineering, and computer science at the lowest cost within the region. Table 3 also suggests that Makerere charges the least cost tuition for the courses of Surgery and Medicine, and agriculture and food science for US\$ 1, 977 and US\$ 1,971 per annum respectively, compared to US\$ 2,208 charged by the National University of Rwanda, and US\$ 5,042 at the University of Nairobi for Surgery and Medicine.

Admission Requirements

In terms of university admission requirements, foreign students seeking admission in Tanzania Universities with exception of those admitted through the public universities exchange program have to sit for the matriculation examination. This partly explains the fewer foreign students' entry into Tanzania's tertiary institutions. On the other hand, admission to Uganda's public universities the Kenyan candidates are required to have, for example, undergo advanced level studies for 2 years and at least obtained two strong principle passes. The private universities in most cases insist on a 6-9 months bridging course before candidates can join the institutions. Uganda's university requirements seem to be more flexible and attractive for students to access university education in Uganda (Maviiri, 2008).

Table 3: University Fees Structure in the EAC partner states, 2011

	Bachelor of Commerce	Bachelor of Laws	Bachelor of Surgery and Medicine	Bachelor of Science (Civil & Mechanical Engineering)	Bachelor of Science (Agriculture & Food Science)	Bachelor of Science (Computer Science)
Makerere University	1,464 ¹⁹	1,527 ²⁰	1,971 ²¹	1,647 ²²	1,971 ²³	1,722 ²⁴
Strathmore University Nairobi	3,181 ²⁵					
University of Nairobi	2,538 ²⁶	2,511 ²⁷	5,042 ²⁸	3,910 ²⁹	3,910 ³⁰	1,588 ³¹
University of Dar es Salaam	**3,500 ³²	**3,500 ³³		**2,700 ³⁴	3,160 ³⁵	**3,500 ³⁶
National University of Rwanda	**1,998 ³⁷	**1,003 ³⁸	**2,208 ³⁹	**1,578 ⁴⁰	**2,700 ⁴¹	**1,467 ⁴²

Notes:** tuition fees exclude functional fees

Source: University Websites access in 2011.

19 See Makerere University, http://mak.ac.ug/index.php?option=com_content&task=view&id=110&Itemid=259 visited on 30th July, 2011

20 Ibid Makerere University

21 See http://mak.ac.ug/index.php?option=com_content&task=view&id=110&Itemid=259 Visited on Sep, 2011

22 See http://mak.ac.ug/index.php?option=com_content&task=view&id=110&Itemid=259 Visited on Sep, 2011

23 See Ibid Makerere University

24 See Ibid Makerere University

25 See Strathmore University Nairobi, http://www.strathmore.edu/sfae/bbs/feestructure_eco.php visited on 30th July, 2011

26 See University of Nairobi, http://archive.uonbi.ac.ke/admission//UoN_Admission_book.pdf visited on 31st July, 2011

27 Ibid University of Nairobi

28 See http://humananatomy.uonbi.ac.ke/degree_regulation_details/859 Visited on 12th September, 2011

29 See http://engineering.uonbi.ac.ke/degree_regulation_details/4430 Visited on 12th September, 2011

30 See http://agriculture.uonbi.ac.ke/degree_regulation_details/3880 Visited on 12th September, 2011

31 See http://sci.uonbi.ac.ke/degree_regulation_details/426 Visited on 12th September, 2011

32 See University of Dar es Salaam, http://www.udsm.ac.tz/userfiles/file/Undergraduate_fees_2009_2010.pdf visited on 30th July, 2011

33 See University of Dar es Salaam link

34 See http://www.udsm.ac.tz/userfiles/file/Undergraduate_fees_2009_2010.pdf visited on 12th Sep, 2011

35 See http://www.suanet.ac.tz/docs/fees_2010.pdf Visited on 12 September, 2011

36 See http://www.udsm.ac.tz/userfiles/file/Undergraduate_fees_2009_2010.pdf visited on 12th Sep, 2011

37 See National University of Rwanda, <http://www.nur.ac.rw/spip.php?article85> visited on 31st July, 2011

38 See NUR

39 See <http://www.nur.ac.rw/spip.php?article85> Visited on 12 September, 2011

40 See Ibid National University of Rwanda (NUR)

41 See Ibid NUR

42 See Ibid NUR

Academic Staff Remuneration

This section draws a comparison of the salary scales of university academic staff for Uganda's Makerere University and Kenya's University of Nairobi. Regardless of the academic position, the wage per month in Makerere University is well below that offered at the University of Nairobi (Table 3); with a higher variance at the position of VC and DVC. It is prudent to point out here that Uganda and Kenya are at different stages of development; and with different capacities in terms of tax base. In other words, Kenya is in a better position to support slightly higher wages for academic staff compared to Uganda. With free labour mobility as provided therein the EAC Common Market Protocol on movement of workers, Makerere University is at a possible risk of losing its skilled staff to regional institutions with better remuneration structures if such anomalies are not addressed by the government and the institution itself.

Table 4: EAC Regional Universities' Academic Staff Monthly Wage, US\$

	US\$/Month				Variance (%) ⁴³
	Uganda (MUK)*	Kenya (UON)***	Tanzania (UOD)	Rwanda (NUR)	
VC	1,334	4,675			71.5
DVC	1,297	3,289			60.6
Professor	1,260	1,436			12.3
Associate	1,143	1,302			12.2
Senior Lecturer	932	1,101			15.3
Lecturer	793	997			20.5
Assistant Lecturer	762	859			11.3
Teaching Assistant	634	..			

Source: * Makerere University Planning Unit, 2011; *** United States International University Report on Teaching Staff Salary Review by Federation of Kenya Employers, 2011.

Quality index of regional secondary education

Uganda also remains in a better position in the structure of its secondary education with a better quality index of student-teacher ratio at 18 by 2009 compared to 31 for Kenya, 32 for Rwanda 48 for Tanzania and 58 for Burundi (Table 5). The most plausible explanation for Uganda's better quality index is government's efforts to improve the staffing levels in 1997 and 2007. Although others would argue that Uganda's seemingly better quality index could be attributed to low transition rate from primary to secondary education, this argument would be hard to substantiate since it would require extensive regional data on enrolment for a number of years.

43 This is the difference in the remuneration between academic staff at the University of Nairobi Kenya and Makerere University Kampala

Table 5: Pupil/Student Teacher Ratio among EAC partner states

Indicator	States \ Years	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Primary	Burundi	68	69	70	70	76	86	85	84	83	82
	Tanzania	53	53	53	57	58	56	52	53	54	54
	Uganda	59	54	56	52	50	50	48	57	50	49
	Kenya	31	32	34	39	40	41	47	48	50	52
	Rwanda	54	51	59	65	67	69	71	74	66	63
Secondary	Burundi	45	41	43	37	42	56	51	56	60	58
	Tanzania	-	-	-	-	-	-	29	34	37	43
	Uganda	-	18	18	18	19	19	19	39	21	18
	Kenya	16	18	18	20	21	20	24	27	32	31
	Rwanda	52	52	25	25	26	29	31	22	18	32

Source: EAC Secretariat Statistics, 2011

In conclusion, it would be imperative to note that basing on the underlined parameters for comparison of the education sector among the five EAC partner states, Uganda seemingly reveals a better competitive advantage in the education services exports. This is more specific to the secondary and university education across many study programs. However, the expansion in the sector has prompted public concern with regard to quality assurance. This sets another challenge to guarantee the standards of private providers, especially, through prudent supervision by the regulatory authority to ensure that the nation's overall tertiary system remains competitive within the regional scene, as well as at the global level.

5. EAC MEMBER COUNTRIES' COMMITMENTS IN THE SERVICE SECTOR

Trade in services are defined by the modes of provision of a particular service. According to the WTO under the GATS, as well as other trade agreements covering services, the modes of services are in four categories, depending on the territorial presence of the supplier and the consumer at the time of the transaction. Pursuant to Article I: 2 of the GATS, the modes of services supplied include:

1. Mode 1 provides for **cross-border supply** of services from the territory of one member into the territory of any other member. For example, Tele-diagnosis from partner country B into partner country A. Notable here is that, the service supplier supplies service from territory of partner country B to a service consumer in territory of partner country A without the service supplier or consumer crossing the border.
2. Mode 2 covers **consumption abroad**, here, a service consumer of one partner country moving to the territory of another partner to consume services therein. For example, tourism, medical services among others.
3. Mode 3 deals with **commercial presence** of a service supplier of one member in the territory of any other Member. For example, a hospital operator from partner country B establishing a subsidiary in partner country A.
4. Whereas Mode 4 deals with the **presence of natural persons**. It involves temporary movement of a service supplier of one partner state moving into the territory of any other partner to offer his services. For example, physician from partner state B practicing in the territory of partner country A.

It is important to note that although governments may be good at scheduling commitments in services liberalisation, they in most cases remain reluctant to eliminate some non-tariff measures in services trade. This leaves services sector much more regulatory-intensive than the goods sector, most services-regulating institutions at times deal with trade in services as natural and inevitable precautions rather than as impediments to trade (Stoleret. *al* 2008).

The EAC partner states committed most of the services sectors, both under market access and national treatment in their schedules of commitments, with exception of some sub-sectors and some modes of supply, especially mode 4 which is subjected to the protocol on movement of workers. There remains a lack of commitments in mode 3 for certain subsectors, and limitations maintained by some partner states therein for those committed. For example, there are still prevailing barriers within the protocol on issues of work and residence permits, right of establishment and the unbound commitments on legal services, accounting, auditing and booking services, data processing services, data base services, research and development services in natural sciences, social sciences, humanities, interdisciplinary research and development services, life, accident and health insurance and telecommunication services on the part of Burundi, among others. Kenya unbound the sub-sectors of postal services

and telecommunication. Likewise, Rwanda maintains restriction on some of its services sub-sector including commission agents, franchising, wholesale service and retail. Similarly, Uganda remains closed to wholesale, retail and travel agencies and tour operators as well as guides. However, except for Kenya and Tanzania, the other partner states fully liberalised their education services sector including online education services at primary and secondary levels, though this seems inapplicable within the structure of the education system in these partner states.

The partner states also retained some restrictions on the stay of students in respective member countries. The requirement of a student pass is appended in regulation 6 of the EAC Annex on Free Movement of Persons, where by the student is required within 30 days of entry to provide to the immigration department:

- i. A valid common standard travel document or a national identity card, in accordance with paragraph 2 of regulation 5;
- ii. A confirmation of admission in an approved training establishment in the host Partner State;
- iii. A confirmation of sponsorship for the training to be pursued; and
- iv. In the case of a child, the identification of the guardian to be responsible for the child while the child is in the host Partner State.

Regulation 7 in the same protocol bars international students from undertaking any employment in the territory of the host partner state except where an international student is on internship or industrial training. Likewise, the requirement to prove confirmation of sponsorship is in away a barrier for private-sponsored students who at times spend more than 30 days before clearing their tuition fees. These current requirements if remain unchanged might frustrate the spirit of deeper integration.

6. OPPORTUNITIES FOR UGANDA'S EDUCATION SERVICE SECTOR

In identifying trade opportunities in services exports, there is a need to ascertain evidence of competitive service provision; an appropriate mix of quality, price and innovation, market availability, and selecting and promoting a cluster of services which can help build a national reputation.

The available statistics in the country's education services sector, ranging from fees structure, university ranking, wage bill, and secondary education quality index indicates Uganda's strength and opportunities in education services provision relative to her other partner states in EAC. Therefore, it puts Uganda at a competitive advantage in this sub-sector compared to its partner states. This raises the need for the Government of Uganda to address institutional constraints that remain outstanding in the sector, such as lower remuneration to teachers/lecturers at secondary and university level, deepen the institutional base for research in universities and specialized institutes.

There is equally a need for Government to increase research funding to universities and specialised institutions through the National Council for Science and Technology to improve the global rankings of its education institutions. The results to improve the rankings of tertiary institutions cannot be obtained cheaply and its demand is quality driven, thus a need to reform the sector and attract new talent to augment teaching and research. A large backlog of investment in infrastructure must also be addressed. For these reasons, there is a need to funnel additional resources into secondary and tertiary education for a period of at least a decade to offset past shortfalls, and to compensate for the large current stock of workers with weak skills who cannot cost effectively be retrained.

The country could also unilaterally remove the regulations limiting entry of international students in the EAC Annex on Free Movement of Persons to increase the inflow of students in its tertiary and secondary institutions.

7. CHALLENGES IN UGANDA'S EDUCATION SERVICES SECTOR

Although it is regionally known that Uganda registers highest inflow of foreign students within the region into its secondary schools and tertiary institutions, statistics on the value of export earnings and number of students is not available in aggregate. The available trade data on services do not capture the cross-border trade in the area of professional and education services which are known exports of the country's services sector. This therefore calls for major policy intervention by the government to improve statistical collection and reporting on trade in services to improve policy decisions.

An extensive survey of institutions by the Uganda National Council for higher education carried out in 2004, observed that "all higher education institutions do not have adequate financial resources to improve and expand their physical infrastructure, provide modern academic facilities, attract and retain qualified academic staff needed to deliver quality higher education."⁴⁴ This finding was validated by the Assistant Executive Director of National Council for Higher Education Dr. Yeko Acato in October 2011 during the stakeholder consultation.

Realisation of the full benefits of free movement of services and service suppliers will not be possible without supportive and effective labour market policies and laws. The cross-cutting challenge of work permits which underlie the effectiveness of the services trade needs to be directly addressed to enable tertiary graduates to seek to avail themselves of opportunities within the region. A starting point should be to eliminate the requirement of work permits for citizens of EAC partner states with professional qualifications and skills, especially for those seeking to set up their own businesses in the areas of legal practice, medicine, ICT, engineering, accounting and auditing, architecture, and research. Rwanda and Kenya have so far eliminated work permits, at a bilateral level, for their citizens. In the case of Rwanda, the elimination of work permits is extended to all citizens of EAC partner states.⁴⁵ This implies, according to the protocol, that Rwanda cannot at anyone point renege on this decision and reinstate a work permit requirement.

Art. 11 of the Common Market Protocol commit partner states to 'mutually recognise the academic and professional qualifications granted, experience obtained, and licenses or certifications granted in other partner states'. The interpretation of mutual recognition still leaves a gap to fill, given that the systems so far in place in respective partner states remain unchanged and unlevelled, though the qualifications granted by each partner state are supposed to be treated as equivalent to each other in some way.

44 http://www.studyinuganda.com/index.php?option=com_content&task=view&id=121 visited on 12th Sep, 2011

45 See Commencement of the EAC Common Market, STATEMENT BY THE EAC SECRETARY GENERAL, AMB. JUMA V. MWAPACH, <http://www.eac.int/commonmarket/press-room/48-statement-sg-commencement.html> Visited on 17th August, 2011

Cross-border secondary and tertiary education access has grown over the years among the EAC partner states, however, tuition fees in public universities especially in Uganda, Tanzania and Kenya remain un-harmonised in spite of decisions having been taken at the EAC level requiring charging of similar tuition fee rates. Only Rwanda and more specific National University of Rwanda currently charges the same fees structure for EAC partner students. This arrangement calls for immediate political pronouncement and intervention by all heads of partner states otherwise, the fast tracking of the region towards political federation would be meaningless if partner states continue to treat other's citizens haphazardly.

The National Council for Higher Education, which is the regulating body for higher education in Uganda, lacks the capacity in examining the appropriate courses for universities, as well as monitoring and evaluation on the quality of education services offered by universities in the country.

8. CONCLUSION AND EMERGING POLICY OPTIONS

Despite the paucity of data on education services export, the paper has provided insights into areas in the education sector where Uganda has a competitive advantage over those of other EAC partner states, especially at the secondary and university level. The paper has also highlighted the possible threats in terms of challenges that may hinder Uganda's competitiveness in this sector. Thus, there is a need for the country to put more effort in developing the sector through addressing the prevailing challenges. This requires, among other policy interventions, by both the government and respective institutions:

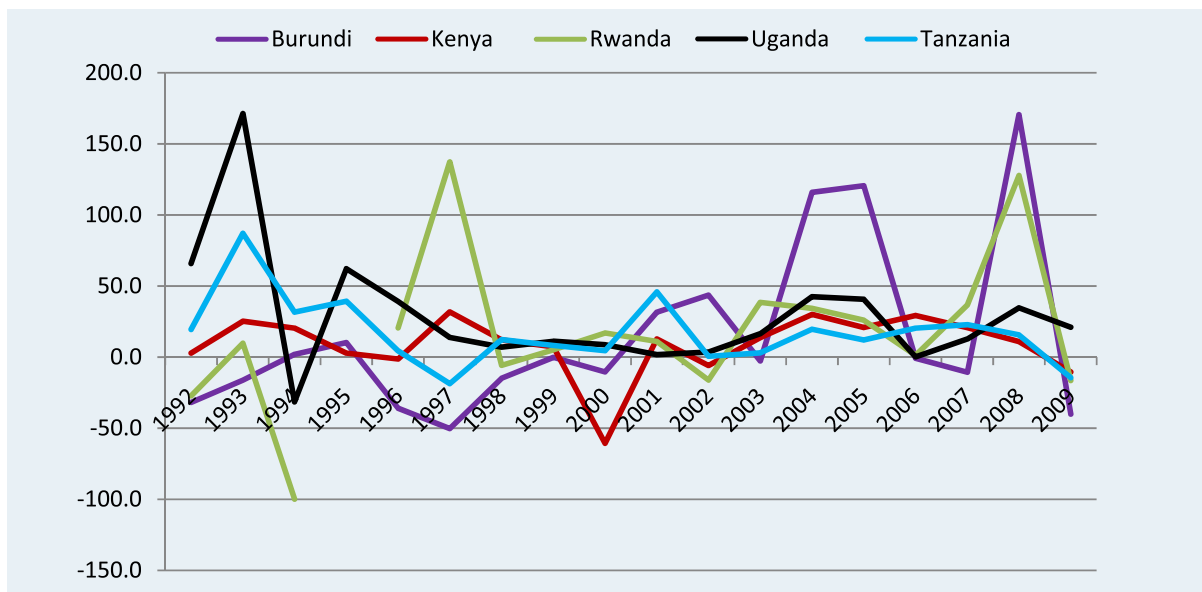
- a) Promotion of online application for admission to ease the process of enrolments, as well as waiver of application fees to attract more potential applicants through the electronic process;
- b) The need to establish a statutory body to handle verification and certification of academic qualifications under the EAC Secretariat, in coordination with Inter-University Council of East Africa. Accordingly, mutual recognition of accreditation of higher education institutions would remove the regulatory requirement of tertiary education institutions that would move across borders to have to applying for fresh accreditation. Similarly, there is a need to speed up the harmonisation of social security benefits in order to support the free movement of labour;
- c) Unilateral removal of the student pass requirement for foreign student and the limitations on foreign students' ability to undertake employment during the tenure in the course;
- d) The need to build institutional capacity of the regulating body through increased funding and staffing, capacity building and linkage with other bodies in advanced economies like United Kingdom, United States and Australia with repute in education services exports for learning purposes. This would improve the quality assurance mechanism, as well as generate avenues for international recognition and acceptance of academic qualifications;
- e) The Ministry of Education and Sports in collaboration with Ministry of Foreign Affairs need to spearhead international education initiatives through building academic linkages in the regional partner states, as well as organising academic exhibitions and conferences within the region to promote the country's education services exports; and
- f) Among other enabling mechanisms that governments can employ to promote the sector would include direct financial subsidies for the installation of utilities and educational infrastructure such as research laboratories, online library, the provision of land at no charge or at discounted prices, and matching grants for information and communications technology (ICT) infrastructure.

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ANNEX

Figure 10: EAC Partner states' Service Export growth rate (%)



Source: UNCTAD Statistics Handbook, 2010

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