

TRADE IN SERVICES

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E-GOVERNANCE

**Trade
and Nurses**

**TRADE IN
EDUCATION
SERVICES**

**Balance of Trade in
Services**

**BELIZE COALITION
OF SERVICES
PROVIDERS**

**Management
Consulting**

**TRADE IN
SPORTING SERVICES**

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E-GOVERNANCE

A BRAVE NEW WORLD

By Alexia Peralta

Project Officer, Public-Private Desk in the Office of the Prime Minister. Technical Secretariat to the Economic Development Council.

Long lines, spaces overcrowded with storage boxes, slow service, costly transactions and endless paper work...these are some of the problems currently faced when trying to access public service. We have all been there. If only there was a solution... a solution that would reduce the need to stand in a queue in a congested government office to submit paper work in order to access a basic service such as renewing your driver's license. As a matter of fact, the solution already exists in countries around the world - Electronic Government!

E-Government is the new and ambitious way of utilizing Information and Communication Technology (ICT) to bring governments closer to its people. Belize currently boasts nationwide fibre optic connectivity for high-speed broadband internet that will allow for major improvements in the delivery of government services. Basic services - application for birth certificates, permits and licenses, passports and visas, the filing for payments and refund of taxes, and so on - can be automated and delivered through secure, efficient and cost-effective online portals.

Many nations, especially the Republic of Estonia being the model in e-Government, are making strides in their efforts to utilize the power of e-Government to drive economic and social transformation by transforming themselves into a digital society.

These success stories have proven that e-Government can help governments achieve improved efficiencies and reductions in processes and costs in the delivery of services. By transforming themselves into a digital society, these nations have experienced an exponential growth in GDP, improved data sharing and communication and greater transparency through better formalization of business activity, increased productivity and participation by the people. If this is clearly the way towards economic and social development, then what is the Government of Belize doing to harness the power of e-Government to transform our paper-based society towards a new and efficient digital society?

The Government of Belize through the Central Information Technology Office (CITO) has already begun transforming our society through international partnerships, policies and projects aimed at leveraging the power of ICT to improve efficiencies across various public services.

In fact, the Government of Belize has partnered with the Government of the Republic of China (Taiwan) through a bilateral agreement to promote cooperation in the area of Information and Communication Technology (ICT). Other key foundational initiatives include the development of a National E-Government Policy, Strategy and Plan of Action, and the current development of an e-Government Road Map aimed to guide us towards an e-Government platform in Belize.

While strides have been made in setting the framework for e-Government, it is safe to say that public administrations still face challenges in accessing the technology and expertise to convert its paper-based services to e-services. The Belize Companies and Corporate Affairs Registry is a prime example, which has resulted in a cumbersome first interaction between business owners and government for the registration of a business. Often times this inefficient service delivery determines the willingness of private sector to formalize. The Economic Development Council (EDC), through its secretariat, the Public-Private Desk, in partnership with the Compete Caribbean Partnership Facility II and the Inter-American Development Bank has led the way in leveraging ICT as a means to re-engineer and digitize the business registration process to achieve improved efficiencies through the reduction of processes and time, making registering your business easier and quicker than ever before.

Other government initiatives include the amalgamation of the Income and Business Tax Departments to the newly improved Belize Tax Service and automation of operational processes being led by the Ministry of Finance and the launch of an improved user-friendly website by the Ministry of Natural Resources allowing for improved communication and enhanced efficiency and responsiveness in the delivery of their services.

In addition, a number of upcoming projects including the full roll out of Microsoft Office 365, implementation of the Belize Motor Vehicle Service Platform and the e-Portal will ensure that the public sector is up to date with the pace of technological developments. Ultimately, these projects will facilitate the transformation of public administration, thereby making it easier for end-users.

The roll-out of eGovernment in Belize will not only see the adaptation of technology to fit the work of government, but also transform the government to better fit the technological demands of the twenty-first century. This is our chance to transform the way citizens interact with government, but also to alter the way government sees itself and the way government delivers services in a citizen-centric way that satisfies end users by enabling government workers to adapt to the digital age.

TRADE AND NURSES

72% of health services were traded primarily by developed countries.

By Tricia Gideon

Trade Economists, CARICOM/CSME Unit, Directorate General for Foreign Trade (DGFT)

The productivity of an economy's labour force depends on how educated, skilled and healthy it is. These characteristics also feed into the quality of a country's educational and health systems. Education, health and environmental services account for a small share of trade at present but are rising rapidly.

According to the World Trade Organization (WTO) 2019 report, trade in health services, from complex surgery to rejuvenation treatments, was estimated at US\$54 billion in 2017, with a share in world trade in services of only 0.4%; however, with a steady annual average growth of 11% since 2005. Globally, more than 72% of health services were traded primarily by developed economies through affiliated hospitals and medical centres in other countries. [1]



[1] World Trade Organization, (2019). World Trade Report 2019: The Future of Services Trade.. Available at https://www.wto.org/english/res_e/booksp_e/03_wtr19_2_e.pdf. Accessed on the 25 March 2020.

According to the Caribbean Council, by 2021, the global health tourism market is estimated to generate between US\$46.6 billion and US\$125 billion per annum, with a compound annual growth rate between 13% and 19%. Caribbean countries that are well connected by air have advanced medical facilities and are able to attract well qualified physicians, as well as support staff and therapists will be well placed to capitalise on all aspects of health tourism. [2]

Health Services are traded on the international market through four modes. The first mode is cross border delivery which specifically covers shipment of laboratory samples, diagnosis, second opinions and clinical consultation results through traditional mail and electronic channels. [3] The second mode is the consumption of health services abroad which covers a patient's movement to another nation to receive medical treatment. The third mode is commercial presence, which covers the establishment of health facilities in foreign countries. The fourth mode is the movement of health personnel, which is the establishment of any health personnel in another country.

Internationally, Belize has made commitments in trade in health services in the areas of general medical services (CPC 93121), neuro-surgery (CPC 93121**), epidemiological services (CPC 93121**), and CATSCAN services (CPC 93122**). Belize has liberalized modes 1, 2 and 3 for these sectors. However, in the areas of mode 4, due to the sensitivity of the movement of persons across borders and to protect the local labour force, most countries have put in place restrictions to protect its senior and managerial personnel and technical experts. [4]

[2] The Caribbean Council, (2019). The Challenge of Developing Health Tourism. Available at <https://www.caribbean-council.org/challenge-developing-health-tourism/> . Accessed on the 26 March 2020.

[3] Chanda, Rupa (2001). Trade in Health Services. World Health Organization. Available at [https://www.who.int/bulletin/archives/en/80\(2\)158.pdf](https://www.who.int/bulletin/archives/en/80(2)158.pdf)

[4] World Trade Organization online information. Available at https://www.wto.org/english/tratop_e/serv_e/serv_commitments_e.htm Accessed on the 25 March 2020.



In the Belize's Human Resources Strategic Plan for 2019-2024, the Government of Belize recognizes health as an essential priority in the country's national development. Although Belize has no national medical university, the country has four registered foreign medical universities. [5] However, the University of Belize and the UNAN-Managua, a University from Nicaragua, have teamed up to develop Belize's First National Medical School, offering both a Bachelor of Medicine and Bachelor of Surgery (MBBS) program by August 2020. [6] Currently, the University of Belize (UB) trains most of the country's nurses, pharmacists and laboratory technicians.

[5] 1) American Northwest University Dry Creek Road Belmopan Belize; 2) Washington University of Health and Sciences, Phillip Goldson International Airport Ladyville Belize; 3) Central America Health Sciences University Ltd. (CAHSU)- Belize Medical College Mile 13 ½ Phillip Goldson Highway Burrell Boom Cut-Off Ladyville, Belize; 4) Columbus University, Phillip Goldson International Airport Ladyville, Belize.

[6] UB Will Open Medical School. (2019, 4 December). Available at <http://7newsbelize.com/sstory.php?nid=51247>. Retrieved 14 April, 2020.

For Belizeans who wish to further specialize in medicine, a few medical scholarships are available to Belizeans to study abroad, in particular, the Cuban scholarship programme. This programme, started by the late Cuban President, Fidel Castro in 1998, intends to build capacity within CARICOM Member States. [7]

Like every sector, the medical sector, in particular the nursing sector, is faced with a number of challenges. The main challenges encountered by the nursing industry include low levels of investment in human resources for health and shortages of nurses. According to the Nurses and Midwives Council, Belize has 941 registered nurses of which 319 have temporary licenses; however, a study published by the Inter-American Development Bank (IDB) in 2018 states that the country will need an estimated 2,000 nurses by the year 2038. [8]

*Belize has 941
registered nurses*

[7] Polanco, Andrea (2018). 11 Belizeans to Study Medicine in Cuba. Channel 5 Belize. Retrieved online at <https://edition.channel5belize.com/archives/1684.39>

[8] Inter-American Development Bank, (2018). Education and Health: The Sectors of the Future? Available at <https://publications.iadb.org/en/future-work-latin-america-and-caribbean-education-and-health-sectors-future-print-version>. Accessed on 26 March 2020.

The World Health Organization has designated 2020 as the International Year of the nurse and the midwife.

Nurses and midwives make up more than half the healthcare workforce worldwide.

- World Health Organization-

Table: 1 Total number of Nurses Currently Registered with the Nurses and Midwives Council of Belize (NMCB) for period 2017-2019

	Nurses	Assistant	Health Nurses	Nurse Midwives	Assistant Midwives
Belizean	466	204	68	188	16
Nigerian	74	9			
Filipinos	8				
Nicaraguan	19	5			
American	28	1			
Canadian	4	1			
India	1				
Guatemalan	3	2			
Taiwanese	2				
Honduran		1			
CARICOM Nationals	15	7			
Cameroon	1				
England	1				
Total	622	230	68	188	16

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Table: 2 Temporary Licenses (1YR)

Nationality	Registered Nurses	Nursing Assistant	Rural Health Nurses	Midwives
Belizean	57	30		
Nigerian	8	3		
Nicaraguan	4	3		1
Filipinos	205			
American	29			2
Canadian	1			
Indian	4			
Cuban	9			
CARICOM Nationals	2	1		
Total	319	37		3

Source: Nurse and Midwives Council of Belize



According to Belize's Human Resources Strategic Plan for 2019-2024, Belize has recruited a number of nurses, mostly women, to assist with the shortage of health professionals, mainly from Cuba, Nigeria and the Philippines. However, language and cultural differences between patients and health professionals may affect the level of care given. Also, the number of available healthcare professionals fluctuate as foreign healthcare professionals return to their home country which results in inconsistency in the quality and availability of care provided.

The Ministry of Health's technical advisors keep a record and monitor private and public facilities and licensing, but there is no established constituted registry for health professionals. Despite these challenges, the association has been able to receive legal advice and scholarship opportunities for its members. [9]

[9] The Government of Belize, (2019). Belize Human Resources for Universal Health Strategic Plan 2019-2024

In February 2019, at the launch of the Human Resource Strategic Plan for 2019-2024, the Chief Executive Officer of the Ministry of Health noted that Belizean nurses receive lucrative offers to work in the United States and in the United Kingdom, which puts a strain on Belize's healthcare system when nurses accept these offers. The Ministry is looking for innovative ways to retain nurses such as providing better working environments and conditions, career advancement opportunities, flexible work schedules, creating and maintaining a strong and supportive work culture, and recognizing and rewarding high performance. Even at the regional level, the shortage of nurses is a concern.[1] In August 2018, the 45th Annual General Meeting of the Regional Nursing Body (RNB) called for urgent action to address the migration of nurses and midwives from the Region. Guyana's Minister for Public Health, Volda Lawrence alluded to the Sustainable Development Goals, particularly goal three, which speaks to ensuring the health and well-being of the Community's citizens and noted that critical and intense efforts were needed as 2030 approaches. "... we cannot achieve the goal of our citizens being the healthiest in the Caribbean, and the Americas, if we do not have at our disposal a core of highly qualified and professional dedicated health workers", she said.

Given the educational opportunities in medicine in Belize, in October 2019, 70% of UB graduates who took the Regional Exam for Nurse Registration (RENr) passed.

[10] Breaking News Belize, (2019). Health CEO looking at ways to keep nurses in Belize. <https://www.breakingbelizenews.com/2019/02/21/health-ceo-looking-at-ways-to-keep-nurses-in-belize/> Accessed on the 25 March 2020.

[11] Massimo Manzi, (2012). "Analyzing the Potential of the Medical Tourism Sector for Investment Promotion - Belize Final Sector Strategy."

The RENr is a standardized regional exam, approved in 1990 by the Caribbean Commonwealth Health Ministers, that is administered by the Caribbean Examination Council. Currently, the Nursing Councils from the Commonwealth Caribbean use it to determine whether a candidate is prepared for entry level nursing practice. Due to the free movement of skills under the CSME, RENr also facilitates the intra-regional movement of nurses to keep trained persons in the region. The health sector can also contribute to the diversification of Belize's exports. Belize's Medical Tourism Sector Strategy states that medical tourism is included among the key sectors for the economy in Belize and is consistent with the "Long Term National Development Framework for Belize – HORIZON 2030". The sector presents job opportunities for women who are involved in the healthcare and tourism sector (nurses, patients assistants, and tourism personnel, among others) and people studying or willing to study a medical career. Hotels will play a key role in offering specialized services to medical tourists, among them nursing support. Thus, the need for government to provide for sound public policy to promote quality and increase the quantity of specialists, technicians and nurses. The strategy also highlights the need for incentives for Belizean nurses to return home. [11]

As the world struggles with the COVID-19 crisis, there is a greater need placed on the medical systems around the world to manage the rapidly increasing rates of infections. Nurses are on the frontline of this pandemic, and the lack of mental and physical support for nurses is an even greater concern. Belize is one of the few countries in the region that has trained psychiatric nurses who provide psychological support to frontline staff, support that should not dwindle during this critical time. The need to prioritize the advancement and development of the health sector is important now more than ever.





BY TRICIA GIDEON
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TRADE IN EDUCATION SERVICES

In 1986 a series of trade negotiations was initiated, called the Uruguay Round, which lasted for seven and a half years with 125 participating countries, including Belize. It concluded in 1994 with the formation of the World Trade Organization (WTO) and the creation of the General Agreement on Trade and Services (GATS). [1] Since then, services exports have been growing. In 2018, services exports represented a large part of the total export earnings for the six largest exporters of international trade in services. The United States (U.S.) alone exported US\$827 billion in services. This is more than double the value of the second and third largest exporters, the United Kingdom (UK) at US\$397 billion and Germany at US\$343 billion.

[1] Owens. MA. (n.d.) Goods International Trade in Education Programs and Services. Retrieved 20 April 2020 from <https://education.stateuniversity.com/pages/2131/International-Trade-in-Education-Programs-Goods-Services.html>

[2] Organization for Economic Cooperation and Development online information. (n.d.). Retrieved 20 April 2020 from <https://www.oecd.org/sdd/its/international-trade-in-services-statistics.htm>.

The next three largest exporters are France, US\$294 billion; the Netherlands, US\$248 billion; and Ireland, US\$213 billion. [2] Some services, such as education, health or environmental services, account for a negligible share of global trade at present, but are rising rapidly. [3] Despite that, the latest data released by the U.S. Department of Commerce's Bureau of Economic Analysis states that in 2018 exports in education services ranked 5th.

During the 2017/2018 academic year, the U.S. hosted over one million students and reported US\$45.3 billion in education exports. [4]

[3] World Trade Organization, (2019). World Trade Report 2019: The future of services trade. Retrieved from https://www.developmentaid.org/api/frontend/cms/uploadedImages/2019/10/00_wtr19_e.pdf.

[4] Export.gov online information, (2019). Education and Training Services Resource Guide 2019. Retrieved from https://2016.export.gov/industry/education/eg_main_108888.asp.

In the UK, revenue from education-related exports and transnational education activity increased to £21.4 billion in 2017, an increase of 7.2% since 2016. [5] In 2002, a total of 42 countries made commitments in education services at the WTO. [6] By 2020, a total of 55 countries have made commitments in education services. [7]

Education services are defined as primary, secondary, higher or tertiary, adult, and other education services. The higher education services sector is further subdivided into advanced, theoretical, professional and practical occupational categories. Other education services are related activities that support the educational process, such as educational testing and student exchange programs [8].

Education services are traded on the international market through four modes. The first mode is cross border supply of education services which covers e-learning platforms for distance learning which is supported through the use of new information technologies and the internet. The second mode is the consumption of education services abroad which refers to a student who travels abroad to study. International flows of students in higher education constitute at present, by far, the largest share of the global market for education services.

[5] Department for Education. (n.d.). UK revenue from education related exports and transnational education activity in 2017 . Retrieved from https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/850263/SFR_Education_Exports_2017_FIN_AL.pdf. Retrieved on 20 April 2020

[6] OECD/CERI, (2002). Current Commitments under the GATS in Educational Services. Retrieved from <https://www.oecd.org/education/skills-beyond-school/2088471.pdf>

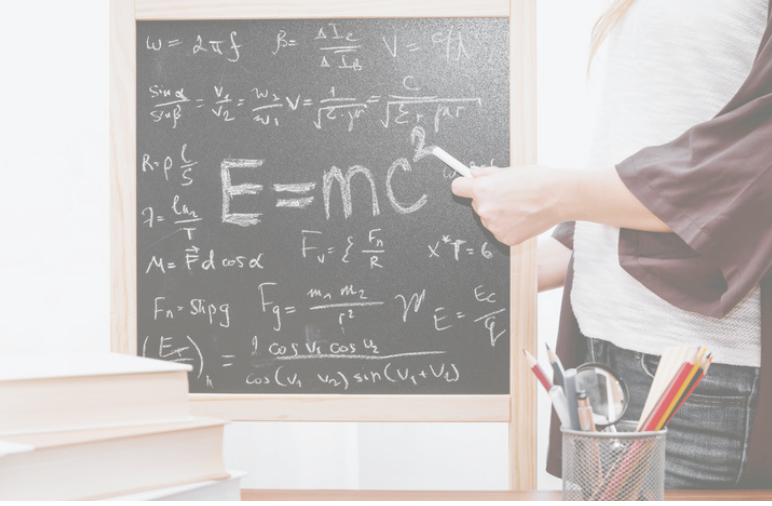
The third mode is commercial presence which refers to the commercial establishment of facilities abroad by education providers either in the form of local branch campuses or partnerships with domestic education institutions. In Belize, there are four approved medical schools that have established local campuses. [9] The fourth mode is the movement of educational personnel which consists of a natural person for example, a professor, researcher or teacher, travelling to another country on a temporary basis to provide an educational service. [10]

[7] World Trade Organization (2020) I-TIPs database. Retrieved 20 July 2020 from <http://i-tip.wto.org/services/Search.aspx>. Afghanistan, Albania, Armenia, Australia, Bulgaria, Cabo Verde, Cambodia, China, Costa Rica, Croatia, Democratic Republic of the Congo, European Union 25, The Gambia, Georgia, Ghana, Haiti, Jamaica, Jamaica, Japan, Jordan Kazakhstan, Kyrgyz Republic, Lao People's Democratic Republic, Lesotho, Liberia, Liechtenstein, Mali, Mexico Moldova, Republic of Montenegro, Nepal, New Zealand, North Macedonia, Norway, Oman, Panama, Russian Federation, Rwanda, Samoa, Saudi Arabia, Kingdom of Seychelles, Sierra Leone, Switzerland, Chinese Taipei Tajikistan, Thailand, Tonga, Trinidad and Tobago, Turkey, Ukraine, United States of America, Vanuatu, Viet Nam, and Yemen.

[8] Owens. MA. (n.d.) Goods International Trade in Education Programs and Services. Retrieved 20 April 2020 <https://education.stateuniversity.com/pages/2131/International-Trade-in-Education-Programs-Goods-Services.html>.

[9] 1) American Northwest University; 2) Washington University of Health and Sciences; 3) Central America Health Sciences University Ltd. (CAHSU); 4) Columbus University.

[10] Larsen. K, Martin. JP, and Morris. R, (2002). Trade in Educational Services: Trends and Emerging Issues. Retrieved from <https://www.oecd.org/education/skills-beyond-school/2538356.pdf>.



"WHAT WE LEARN WITH PLEASURE WE NEVER FORGET."

ALFRED MERCIER

Commercial educational strategies that have gained popularity are partnerships with foreign educational institutions to establish local branch campuses and twinning arrangements or joint degree programmes. Twinning arrangements is a collaborative agreement between institutions where a student does part of his or her degree programme at a home institution and the rest at an institution abroad. [11] In other instances, the educational programs are franchised from the foreign institution. This approach is particularly popular for distance-education programs. This is when one institution offers courses that lead to qualifications from another university; one university will accredit the qualification but the actual teaching and delivery of it will be done elsewhere.

The major objectives of the ongoing trade negotiations for GATS is the reduction of protectionism. Many restrictions on the trade in education services take the form of quotas, nationality requirements, restricted visas, and limitations on financial aid eligibility. These restrictions not only affect students from leaving the country to study at foreign institutions but also the number of foreign teachers employed.

[11] Gürüz. K (2011). Higher Education and International Student Mobility in the Global Knowledge (2nd ed). Suny Press, Albany, NY

[12] Owens. MA. (n.d.). Goods International Trade in Education Programs and Services. Retrieved on 17 April 2020 from <https://education.stateuniversity.com/pages/2131/International-Trade-in-Education-Programs-Goods-Services.html>.

The lack of local recognition of degrees from foreign institutions is also an important issue for distance-education service providers because students enrolled in distance-education programs from a foreign country must ensure that his or her credentials are approved in the country where he or she intends to work. In order to facilitate the trade in services and monitor compliance, countries are encouraged to publish and make easily available all trade-related laws or regulations.

In addition to the GATS, another significant agreement is the Trade Related Aspects of Intellectual Property Rights (TRIPS), which was also created during the Uruguay Round. This agreement has major implications for the provision of education services, since programs franchised or sold are copyrighted or contain copyrighted material. This agreement requires governments to have laws in place to protect and enforce intellectual property rights and to assure the WTO that their penalties for violation of IP laws deter potential offenders. [12].

In 2018, the Central Bank of Belize recorded services trade inflows valued at BZ\$1,261.3 million against outflows of BZ\$467.7 million, resulting in a surplus of BZ\$793.6 million. In 2019, from January to September, trade surplus totaled BZ\$597.9 million. [13]

[13] Central Bank of Belize (2019) online information. Retrieved from <https://www.centralbank.org.bz/rates-statistics/balance-of-payments>.

Currently, Belize does not collect data on trade in education services, and has not made any commitments in this sector at the WTO, but many educational initiatives are in place to support the educational sector and to take advantage of possible opportunities in global educational services trade.

With the proliferation of business possibilities that technology has created for e-learning and entertainment, platforms such as Moodle and Massive Open Online Courses (MOOCs) and streaming services, trade in education services can be better facilitated through cross-border trade. The national University in Belize does not offer online courses to foreign students, but it does offer online courses to local students. There are also a number of Belizean students accessing online tertiary courses in other countries from institutions in North America, Europe, the Caribbean and the rest of the world. At the secondary level, Sacred Heart College and Corozal Community College have an Information, Communication and Technology (ICT) infrastructure to support Moodle, which is a learning platform designed to provide educators, administrators and learners with a single robust, secure and integrated system to create personalised learning environments. The online systems used by these schools help to deliver resources and testing support.

[14] DigiLearn. (n.d.). Retrieved on 16 April 2020 from <https://www.livedigi.com/digilearn>

[15] Organization of American States, (2018, October 16). OAS and ProFuturo Foundation to Bring Digital Education to 23,000 Students in the Caribbean. Retrieved from [https://oas.org/en/media_center/photonews.aspx?sCodigo=FNE-95164](https://oas.org/en/media_center/photonews.aspx?Codigo=FNE-95164).

However, more training for instructors in the delivery of online courses is needed. Digilearn is also enhancing learning in the classroom using a blended approach that allows schools to offer face-to-face and online lessons utilizing a cloud platform. This all-inclusive solution for secondary schools includes the provision of Dell convertible laptops programmed with Microsoft Office 365 educational tools, powered by Digi's latest innovative services. DigiLearn was piloted in April 2019 and launched on 1 October 2019 at eight secondary schools countrywide at the 1st and 2nd form levels. [14] Galen University, Belize's first independent university, offers online courses as well.

Growth in the educational sector can partly be attributed to the immense assistance Belize has received from international partners. The Organization of American States (OAS) and the ProFuturo Foundation signed an agreement in October 2018 to promote digital education in a hundred schools in five Caribbean Community (CARICOM) countries: The Bahamas, Barbados, Belize, Guyana, and Jamaica. [15] For Belize, the ProFuturo Programme will not only bring technological equipment and digital content to 11 schools in the country, but it will also incorporate this technology into the curriculum. [16]

[16] Organization of American States. (n.d.): ProFuturo in Belize: the challenge is to encourage the student's curiosity and autonomy. Retrieved on 16 April 2020 from <https://portal.portaleducoas.org/en/news/profuturo-belize-challenge-encourage-student-s-curiosity-and-autonomy>.

Another program is the Commonwealth Digital Education Leadership Training in Action (C-DELTA). It is a long-term programme of the Commonwealth of Learning (COL) to promote a digital education environment in Commonwealth member countries. With support from COL, the University of Belize has customised the Virtual University for Small States of the Commonwealth (VUSSC) Master's Programme in Educational Leadership to meet the needs of Belizean learners and strengthen lecturers' skills in online course development and delivery. This programme, which began in 2019, will compliment DigiLearn. [17]

Ministry of Education, Youth, Sports and Culture (MOEYSC) has also received support by the Caribbean Development Bank (CDB) through a loan titled the "Belize Education Reform Programme II" which is focused on enhancing the learning environment at the secondary level and expanding access to basic education. As a result, through the Quality Assurance Development Service (QADS), the secondary curriculum is being revised and eight new curriculum frameworks will be developed. The MOEYSC is also reviewing the implications of expanding the mandatory age for education and developing school gardening programs at the primary level. In addition, the loan provides for the construction of 35 schools across the country of Belize with its core focus on early childhood education.

[17] Commonwealth of Learning (n.d.). Belize Launches Online Master's Programme in Educational Leadership. Retrieved on 16 April 2020 from <https://www.col.org/news/news/belize-launches-online-master%E2%80%99s-programme-educational-leadership>.

The GOB and the IDB designed the Education Quality Improvement Program (EQIP) I to support Belize to improve the quality of primary education and the governance of the Belize education system. This loan came to a close in 2019. The objectives achieved were:

- (i) trained approximately 80% of Teacher Education Institution (TEI) pre-service instructors who teach methods courses and 50% of in-service teachers at the primary school level;
- (ii) trained approximately 50% of primary school principals in instructional leadership and administration;
- (iii) trained approximately 50% of primary school teachers in visible and tangible math, science and language arts. This is a total of 1,592 teachers; and
- (iv) developed and implemented the Belize Education Information Management System (BEMIS). Since it was deployed in 2014, BEMIS has helped the MOEYSC collect and manage relevant and real time data in order to support planning that is increasingly based on evidence. Launched in 615 schools and covering 106,000 students, BEMIS allows principals across the country to create student and teacher profiles at the secondary and primary level, organize classes, manage staff, record student attendance, and most recently, to complete the Ministry's annual education survey.

Based on the success of EQIP I, the GOB signed EQIP II loan in January 2020 for the value of USD \$10 million. According to MOEYSC, agriculture, archaeology, engineering, anthropology, blue economy, and eco-tourism can be viable subject areas, given Belize's resources and geographical location.



Furthermore, the development of the Science, Technology, Engineering, Arts and Mathematics (STEAM) school in Belize City can support and foster the development of engineering and automotive electronics in Belize. EQIP II focuses on design and development of a STEAM Laboratory school in Belize City to foster and develop the skills of secondary age students using a project-based approach. This school will be constructed within the next 2 ½ years. The loan will also cover the training of the remaining 50% of primary school teachers in math, science and language arts and will also cover electronic teaching methods given the Covid-19 crisis.

Nevertheless, more work is needed. Graduates from Technical Vocational Education and Training institutes in participating CARICOM Single Market and Economy (CSME) Member States can live and work within the region. However, those institutions must be able to issue Caribbean Vocational Qualifications (CVQs). Established in 2003, the Caribbean Association of National Training Authority (CANTA) was endorsed by CARICOM as the implementation arm of the Regional Coordinating Mechanism for Technical Vocational Education and Training (RCMTVET). The Caribbean Vocational Qualifications (CVQ) framework includes a common skill level for all qualifications: Level 1 – semi skilled worker or directly supervised; Level 2 – skilled or supervised skilled worker; Level 3 –supervisor/technician/instructor or independent skilled worker; Level 4 – entrepreneur or specialized worker; and level 5 – managerial and/or professional worker. Belize has an Employment Training and Education Services (ETES) area that carries out some of the functions of a National Training Authority (NTA).

It is the MOEYSC intention to transform ETES into a full fledge NTA in order to be able to grant CVQs to graduates from the Institute for Technical and Vocational Education and Training (ITVETs) and other TVET training providers. Presently, it does not issue Caribbean Vocational Qualifications (CVQs). [18]

Belize has been working to improve its ability to monitor the quality of its education system. A school inspectorate has been established to inspect schools at the primary and secondary levels. Tertiary education institutions are currently being supported in their efforts to develop and/or strengthen internal quality assurance systems. Training has been provided using quality assurance professionals from UWI and the University of North Georgia. MOEYSC has worked with participating institutions to draft standards to guide internal and external reviews. This is in preparation for the establishment of an external quality assurance agency which will oversee the registration and accreditation of tertiary education institutions. This agency will be responsible for providing quality assurance (monitoring and assessment) of all government, grant-aided and private educational institutions and programs at all levels of the education system in Belize. A framework for the structure and operation of such an agency has been approved and terms of reference developed for drafting legislation to establish it.

[18] CANTA Secretariat, (2005). CARICOM Process for Workforce Training, Assessment and Certification 2005. Retrieved from file:///C:/Users/kpadi/Downloads/CANTA_Model%20(1).pdf.



Over the last two years, UB has recruited teachers and administrators from the Caribbean, in particular from Trinidad and Tobago. Established partnerships have allowed Belizeans to access scholarships from the University of the West Indies (UWI) and OAS. In the past, Belize collaborated with the University of Guyana, Anton de Kom Universiteit van Suriname, and University of West Indies, Saint Augustin campus, to offer a Masters degree in Biodiversity Conservation and Sustainable Development. Courses for the programme were offered online and students were able to participate in field work of their choice either in Belize or Suriname. [19] In an effort to revive regional partnerships, UB has been working with the Environmental Research Institute to develop and offer a Master's programme in Biodiversity Conservation and Sustainable Development. [20].

The Caribbean, including Belize, has a large number of educators leaving to study, work and live abroad; consequently, the region has problems accessing people in the education sector who have the relevant qualifications.

[19] University of Belize to Offer New Programme. (2011, May 25). Ambergris Caye.com forum. Retrieved from <https://ambergriscaye.com/forum/ubbthreads.php/topics/408612/biodiversity-and-sustainable-development-at-ub.html>.

[20] Environmental Research Institute. (n.d.). UB ERI is an Organizer of the 6th NRM Symposium: Retrieved on 21 April 2020 from <http://www.uberibz.org/post/2012/04/05/ub-eri-is-an-organizer-of-the-6th-nrm-symposium>

In the MOEYCS's draft strategic plan, there is a five-year action plan to develop a public awareness campaign to recruit qualified and dedicated educators, especially males. To support these efforts, pay scales need to be restructured to properly compensate teachers, especially those in technical fields who do not have a degree but have a series of certifications in a specific field, known as micro-credential; and to build their capacity in pedagogy and technical skills. Study abroad programmes, as noted above, generate most of the revenue from education services. Negotiated cooperation agreements allow Belize to offer scholarships through UB's language centre to persons at embassies in Belize. As an English-speaking country, Belize can better position itself to take advantage of this lucrative sector with technical support in the form of programming and marketing. Furthermore, the Caribbean has an opportunity to collaborate more among each other in terms of knowledge sharing and to strengthen, not only CARICOM-EU linkages to increase the intake of international students into local universities, but also the intake of international students from the Americas.

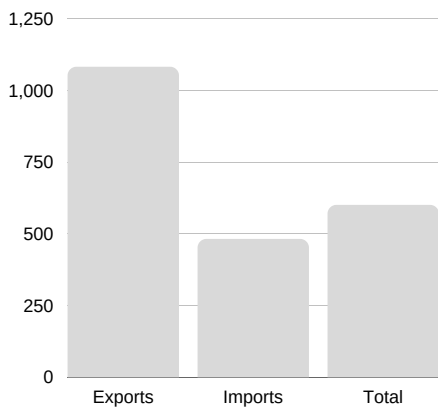
Continued negotiations globally and nationally are needed in this area to develop common standards and quality assurance measurements for professional and advanced education. More importantly, decision makers must focus on the right metrics that support the national development of the educational sector.

BALANCE OF TRADE IN SERVICES

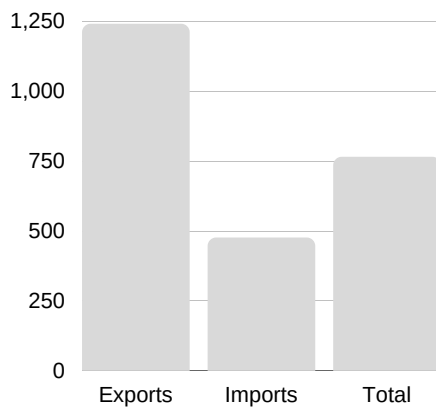
2018-2019



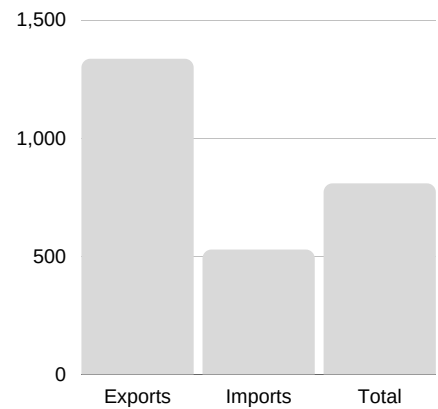
Millions in BZ dollars



2017



2018

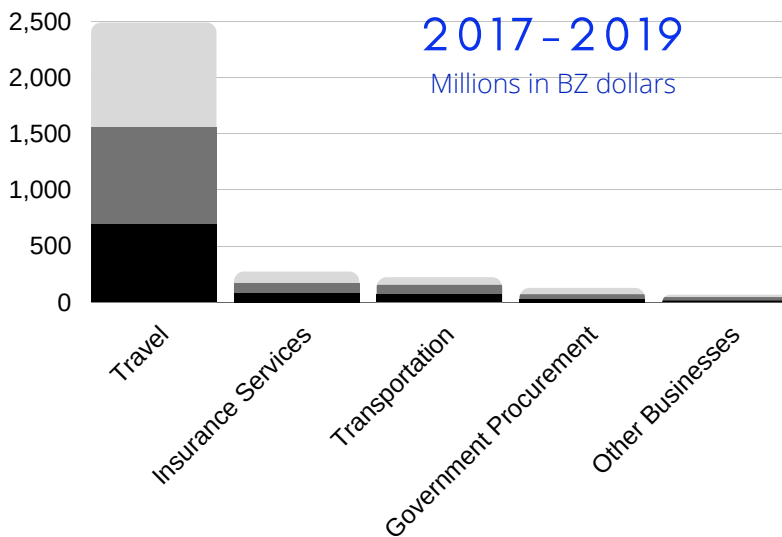


2019

TOP FOUR AREAS

2017-2019

Millions in BZ dollars



1. Travel
2. Insurance
3. Transportation
4. Government Procurement
5. Communication, Computer, Information Services,
6. Other Business

Source: Central Bank of Belize



WHO ARE WE

The Belize Coalition of Service Providers (BCSP), established in 2010, is an alliance of service sector organizations and associations that functions as a lobby and channel for addressing economic development and trade-in-services issues that impact the services sector. The BCSP was established to help the services sector stakeholders advocate for the creation of an enabling environment which will allow the Belizean services sector to survive in the competitive, global marketplace and meet the challenges encountered in exporting their services.

- WHAT WE DO -

01 Organizational Capabilities

Functions as the secretariat for nascent associations and improves members' organizational capabilities through assisting with their incorporation.

04 Standards

Improves services standards and ensure that service providers adhere to them.

02 Grant Funding

Assists member associations, through donor funding, to build capacity through technical cooperation arrangements and project implementation.

06 Education & Research

Educate members about current laws and regulations and how these could affect business prospects.

03 Forum for Views

Serves as a forum for collating and debating the views of its members and represent their interests to the Government of Belize.

05 Regulatory Environment

Reviews existing regulatory environment, submits recommendations and advocates for government to adopt new laws and regulations to support trade in services and protection of the Belizean consumer.

Source: Belize Coalition of Service Providers



Photo credit: Belize Coalition of Service Providers



Photo credit: Belize Coalition of Service Providers

MEMBERSHIP

ASSOCIATIONS

01

Association of Professional Architects (APAB)

02

Association of Professional Engineers (APEB)

03

Association of Real Estate Brokers of Belize (AREB)

04

Belize Association of Contracting Professionals (BACP)

05

Belize Association of ICT Professionals (BAICTP)

06

Belize Association of Planners (BAP)

07

Belize Audio Visual Industry Association (BAVIA)

08

Belize Medical Tourism Association (BMTA)

09

Belize Spa & Wellness Association (BS&WA)

10

Customs Brokers Association of Belize (CBAB)

11

Belize Association of Human Resource Professionals

Source: Belize Coalition of Service Providers

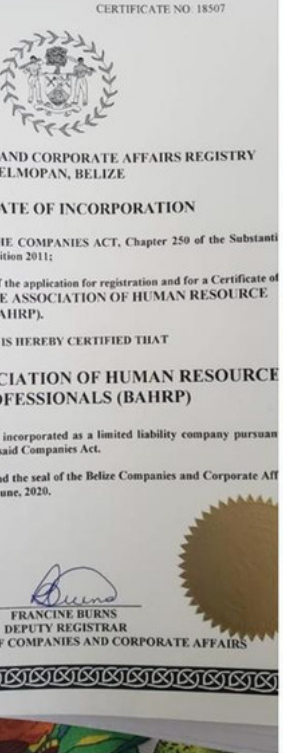


Photo credit: BCSP

TOP 10 ACHIEVEMENTS FOR THE BCSP IN 2020

1. Assisted in the formation of the Belize Association of Human Resource Professionals. This association is a member of the BCSP and the Caribbean Society for Human Resource Professionals.
2. Found a permanent home with the support of the Association of Professional Engineers of Belize.
3. Solidified a Memorandum of Understanding (MOU) with the Canadian firm Economic, Expertise and Consulting International and assisted with their Inter-American Development Bank (IADB) COVID 19 survey for Belize.
4. Launched the BCSP Newsletter.
5. Created a three (3) year Strategic Plan.

THE VOICE OF THE SERVICES SECTOR

6. Collaborated with Canada on the COVID 19 recovery program with funding from Canada Fund for Local Initiatives (CFLI) to aid in Recovery/Stimulation training and preparation for unemployed, entrepreneurs, and businesses facing the impacts of COVID-19. The project's goal is to: Firstly, assist a mix of 25 Belizean and 25 Trinidadian entrepreneurs poised to recover their business and/or those who are ready to export their services are supported to enhance their existing local strategic plans and grow it into an export strategy plan. Secondly, acquisition of a \$22,000.00 Canadian grant for capacity Building Project - CV preparation and interviewing skills preparation with a goal to regain employment by assisting them with the necessary skills to re-enter the job market. Training is scheduled to commence on 11 September, 2020. Thirdly, to assist 12 Business Persons (GM level) in the service sector to recover from the COVID19 pandemic by assessing their business's status, identifying sustainability methods and assisting in an innovative methodology of working with them to create a recovery plan with a continuity component from this and other future,

7. Developed the Belize Promise Covid 19 Pledge.
<https://www.bcsp.org.bz/belize-safe-promise/>

8. Collaborated with BELTRAIDE on the development of a service directory and other service support areas.

9. Submitted project proposals for and on behalf of Belizean musicians and the Belize Spa and Wellness Association.

10. Successfully collaborated with the Jamaica Coalition of Service Providers, Trinidad and Tobago Coalition of Service Industries and Caribbean Export to prepare 21 Belizean business owners in export strategy preparation under the Services Go Global training package.

Source: Belize Coalition of Service Providers

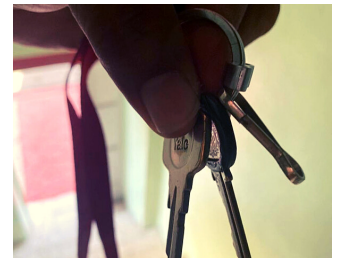


Photo credit: BCSP

**VISIT
WWW.TIPS.BZ**

an online creative market place and a multi-vendor platform for selling Belizean art/artists

Management Consulting

BY TRICIA GIDEON

TRADE ECONOMISTS, CARICOM/CSME UNIT,
DIRECTORATE GENERAL FOR FOREIGN TRADE (DGFT)

In the modern economy, not only do goods transit borders, but also services such as logistical support, telecommunications, land sales, entertainment, graphic design and so forth; and many times, these services are embodied in the trading of goods. By understanding its value and its intricate importance in the supply chain of commerce, governments will be more inclined to invest in and develop the services sector.

Governments must ensure they put in place the appropriate e-commerce regulatory framework and build institutional capacity to create the enabling environment that will assist the sector to be competitive in the global economy.

A growing and lucrative sector is management consultancy. Since 2011, the size of the market share for global management consulting has seen a steady increase. Due to the changing business landscape brought on by the new strain of corona virus disease (COVID-19), global management consulting market size is expected to decrease from US\$160 billion in 2019 to US\$130 billion in 2020. [1] The fortunes of the management consultancy sector in the twentieth century is twofold: the growth of large industrialized corporations and the strategic alignment with financial and banking institutions. For example, in 1933, the Glass-Steagall Banking Act prevented banks in the United States (US) from engaging in non-banking activities, including management consultancy, consequently providing an opportunity for significant growth in the industry.

With further expansion of the industry post-World War II, the creation of industry bodies known as Institutes of Management Consultancy in the US and Europe were formed. These institutes acted as quality control mechanisms that certified consultants and provided best-practice guidance and advice on ethics. [2]

Management consultancy is the business of providing management and related advice to a wide variety of organizations or clients and, increasingly, the implementation of that advice. Most definitions tend to exclude the undertaking of operations for the client. [3] According to Consultancy.uk, an online platform for the United Kingdom's (UK) advisory and consulting industry, management consulting, due to the great diversity in disciplines and varied required capacities of advisors, is the broadest area within the consulting industry, and covers more than 50% of the total global consulting market. [4]

[1] Statista, 2020. Retrieved on 12 May 2020 from <https://www.statista.com/statistics/466460/global-management-consulting-market-size-by-sector/>

[2] O'Mahoney, J. O. (2010). *Management Consultancy*. New York, NY: Oxford University Press,

[3] O'Mahoney, J. (2016). *Management consultancy* (p. 269). Edited by Adrian Wilkinson and Steward Johnson. *Encyclopedia of Human Resource Management*. Edward Elgar Publishing, Northampton, MA.

[4] *Management Consulting* (n.d.). Retrieved on 12 May 2020 from <https://www.consultancy.uk/consulting-industry/management-consulting>.

Consultancies may also provide organizational change management assistance, development of coaching skills, process analysis, technology implementation, strategy development, or operational improvement services such as processes and procedures especially amid COVID-19 where business continuity is imperative. Different types of consulting services also exist such as realtor services, IT systems development and consulting, outsourcing services and advice, financial consulting, tax audit finance, pure management consulting, and engineering asset management infrastructure, among others. [5] In fact, utilizing the benefits that governments provide to an investor requires the hiring of a local consultant to assist in the navigation of these programs, for example, the drafting of environmental compliance plans, qualified retirement programs, work permit acquisition and/or fiscal incentive applications.

Management consulting services are traded on the international market through four modes. The first mode is cross-border supply of consulting management services which covers the provision of information or solutions to clients via the internet. The second mode is the consumption of consulting services abroad which refers to clients who travel to procure the services of a consultancy firm. The third mode is commercial presence which refers to the commercial establishment of a consultancy firm abroad, either in the form of local branch or subsidiary. The fourth mode covers individuals travelling from their own country to supply services in another, for example, a consultant travelling abroad to provide IT services.

In July 1991, the World Trade Organization (WTO) Secretariat compiled a services sectoral classification list (W/120) to ensure Member States comparability and consistency in commitments undertaken at the WTO. This is a comprehensive list of services sectors and sub-sectors covered under the General Agreement on Trade in Services (GATS). [6]



Photo credit: Dionne Chamberlain Consulting

The 160 sub-sectors are less detailed than the categories contained in the United Nations Provisional Central Product Classification (CPC). One of the services sectors of growing interest globally is management consulting services. It is classified under the heading other business services as management consulting service (865), services related to management consulting (866) and related scientific and technical consulting services (8675). At the WTO, many countries have made commitments in this sector. In 2020, a total of 62 countries have made commitments in either all three aforementioned consulting services or in at least one consulting service. [7]

[5] O'Mahoney, J. O. (2010). *Management Consultancy*. New York, NY: Oxford University Press.

[6] World Trade Organization W/120 sectoral classification: Business Services; Communication Services; Construction and related Engineering Services; Distribution services; Educational Services; Environmental Services; Financial services; Health related and Social services; Tourism and Travel Related Services; Recreational, Cultural and Sporting Services; Transport Services; other services not included elsewhere.

[7] Trade Organization (2020) I-TIPs database. Retrieved 20 July 2020 from <http://i-tip.wto.org/services/Search.aspx>. Afghanistan, Albania, Argentina, Armenia, Australia, Brazil, Bulgaria, Burundi, Cabo Verde, Cambodia, Canada, Chile, China, Colombia, Croatia, Cuba, Dominican Republic, European Union 25, Ecuador, Eswatini, The Gambia, Georgia, Hong Kong, China, Iceland, Indonesia, Israel, Jamaica, Japan, Jordan, Kazakhstan, Korea, Republic of Kuwait, the State of Kyrgyz Republic, Lao People's Democratic, Lesotho, Liberia, Liechtenstein, Malaysia, Mexico, Moldova, Republic of Mongolia, Montenegro, Morocco, Namibia, Nepal, North Macedonia, Norway, Oman, Panama, Papua New Guinea, Qatar, Romania, Russian Federation, Samoa, Kingdom of Saudi Arabia Kingdom, Seychelles, Sierra Leone, Singapore, South Africa, Switzerland, Chinese Taipei, Tajikistan, Thailand, Tonga, Trinidad and Tobago, Turkey, Ukraine, United Arab Emirates, United States of America, Uruguay, Vanuatu, Venezuela, Bolivarian Republic, Viet Nam, and Yemen.

Table 1: Belize's exports values in Management Consulting from 2014-2017 (US dollars) (MNS)

Exporting Country	Exported value in 2014	Exported value in 2015	Exported value in 2016	Exported value in 2017
Belize	\$6,942	\$5,140	\$3,921	\$5,953

Source: International Trade Centre Trade Map.



Belize has not made any commitments in this sector at the multilateral level, but it does export Management consulting services. According to the International Trade Centre (ITC) Trade Map, estimated export values in consulting management services from Belize to the world from 2014 to 2017 totaled US \$21.9 million. In 2014, exports totaled US\$6.9 million which fell in following years totaling US\$5.9 million in 2017. (Please see Table I below). Among the Caribbean, Suriname has the highest value of exports in management consulting totaling US \$38 million followed by the Dominican Republic with a value of US \$26.2 million.

Table 2: Caribbean Export Values in Management Consulting from 2014-2017 (US dollar)

Exporting Country	Exported value in 2014	Exported value in 2015	Exported value in 2016	Exported value in 2017	Exported value in 2018
Anguilla	\$1,019,000	\$716,000	\$199,000	\$177,000	\$190,000
Antigua and Barbuda	\$1,157,000	\$3,223,000	\$3,503,000	\$3,661,000	
Belize	\$6,942,000	\$5,140,000	\$3,921,000	\$5,953,000	
Dominica	\$203,000	\$219,000	\$182,000	\$157,000	
Dominican Republic	\$19,700,000	\$23,100,000	\$28,200,000	\$27,100,000	\$26,200,000
Grenada	\$567,000	\$686,000	\$932,000	\$980,000	
Guyana	\$21,698,000	\$4,656,000	\$5,696,000	\$6,835,000	
Jamaica	\$887,000	\$150,000	\$150,000	\$150,000	\$150,000
Montserrat	\$1,688,000	\$1,709,000	\$1,749,000	\$1,491,000	\$1,547,000
Saint Kitts and Nevis	\$410,000	\$438,000	\$448,000	\$464,000	
Saint Lucia	\$2,563,000	\$4,788,000	\$4,751,000	\$4,910,000	
Saint Vincent and the Grenadines	\$2,088,000	\$621,000	\$521,000	\$529,000	
Suriname	\$38,344,000	\$19,719,000	\$35,850,000	\$35,365,000	\$38,647,000
Trinidad and Tobago	\$5,458,000	\$5,977,000	\$5,842,000	\$8,854,000	\$7,551,000

Source: International Trade Centre Trade Map.

CONSULTANTS IN BELIZE

Although Belize does not have a formally constituted consulting management association, since 2009, there has been a group of consultants who consistently hold discussions, collaborate on projects or issues of national concern, and share local and international business opportunities. Based on the experience of some consultants, an estimated 15 consulting firms with over 150 consultants exist in Belize in the areas of finance, taxes, law, medicine and marketing. Most of these consultants operate in the Belize and Cayo districts. The vision for the group is to stay relevant, share opportunities and ideas among group members and continue to build on a spirit of collaboration and cooperation.

The group is cognizant of the impact of management consultancy services in Belize and estimates the value of the industry in Belize to be at BZ\$20 million. Many local consultants market their services in local tourism and investment magazines and via membership of reputable business associations. Through the Belize Coalition of Service Providers (BCSP), Belize has been able to connect to regional and international partners to grow the industry.

In the absence of an association, participation in regional consulting events are limited due to costs constraints. Despite this, Belize has also been able to compete in sponsored events, trainings and regional conventions, via the BCSP, hosted by the Latin American Association of Service Exporters (ALES) [8] and Caribbean Export. Many consultants have also subscribed to international websites such as the United Nations Development Programme (UNDP), Inter-American Development Bank (IDB) and United Nations High Commissioner for Refugees (UNHCR). Through these subscriptions, international partners provide opportunities for collaboration in areas of expertise and training. The Latin American Association of Services Exporters (ALES) is an international organisation consisting of 35 public and private institutions from 18 countries. The objective is to promote Latin America as a knowledge exporter region and outsourcing destination.

[8] The Latin American Association of Services Exporters (ALES) is an international organisation consisting of 35 public and private institutions from 18 countries. The objective is to promote Latin America as a knowledge exporter region and outsourcing destination.



POSITIVE TURNS

Furthermore, the sector does experience challenges, in particular, the preference among private and public entities to hire international consulting firms instead of Belizean firms and the non-payment of withholding taxes by international consultants as specified by the Central Bank of Belize.

One of the unforeseen consequences of COVID-19 has been the travel bans. It has compelled international consulting firms, unable to travel, to procure the services of local firms to execute and complete their services in the Belizean market, which may be fortuitous for the management consulting industry in Belize.

This positive turn, along with an efficient and functional procuring regime, can further bolster the sector. To provide for greater transparency in the procuring process and publication of services contracts, the Government of Belize signed the regional Protocol on Public Procurement for the Caribbean Community at the Heads of Government Meeting in Castries, Saint Lucia on the 5 July 2019 and ratified it on the 4 October, 2019. The protocol provides for a Community Public Procurement Notice Board (CPPNB). The CPPNB is an integrated online platform which is part of the Community Public Procurement Regime. The infrastructure and instruments for an integrated public procurement regime was developed in keeping with the mandate in Article 239 of the Revised Treaty of Chaguaramas Built-in-Agenda in which Member States agreed to elaborate on a Protocol on Government Procurement. Antigua and Barbuda, Barbados, Belize, Dominica and Saint Vincent have signed the Protocol on Public Procurement.



TRANSPARENCY



Photo credit: Dionne Chamberlain Consulting

THE GOVERNMENT'S COMMITMENT TO INVEST IN THE IMPLEMENTATION OF A NEW INTEGRATED TAX ADMINISTRATION SYSTEM (ITAS).

Under the 11th European Development Fund (EDF), Belize was the first country to commence training on the CPPNB in early March 2020. Belize is the only country that has ratified the agreement, and once four other Member States have ratified the agreement, it will enter into force. Below are the regional thresholds outlined in the Protocol:

1. Goods: USD \$150,000
2. Services: USD \$150,000
3. Works: USD \$3,000,000 and USD \$ 4,000,000 for Less Developed Countries (LDCs).

More information on the CPPNB can be found at: <https://blz-cppnb.caricom.org/epps/home.do>.

Another challenge the sector confronts is the high cost of establishing and doing business in Belize. This became more acute with COVID-19, as there exists overhead expenses without incoming revenue. To address this issue, the Government of Belize has embarked on a modernization of the tax administration system to improve service delivery, realize efficiencies, and enhance revenue collection. This initiative is in fact also intended to encourage greater compliance with tax obligations by simplifying and automating interactions. The main focus of the project is to amalgamate multiple tax departments into one central Belize Tax Service (inaugurated in July 2019) thereby establishing a single point of contact common to all taxpayers with standardized requirements and simplified procedures for registration, filing and payments.

Critically important, the project will also deliver on the government's commitment to invest in the implementation of a new Integrated Tax Administration System (ITAS) which will automate transactions, enable risk-based tax auditing and empower both taxpayer and government with faster access to data for decision-making and analysis.

GOOD SERVICE IS GOOD BUSINESS

In the real estate sector, high visa costs and increased stamp duties on foreign land transactions has affected the sector's profitability and inflow of foreign exchange into the country. As a consequence of COVID-19, the Lands and Surveys Department has moved most of its land transactions online. Currently, applicants are given tracking numbers that allow them to track the entire transaction. This digitized service will facilitate faster turnarounds and returns on investments. The real estate association continues to work with government on policy issues, particularly, the assessing of transfers of property for additional stamp duty. An objective process is key to justify an increase in the market value, and a fair appeals process, when additional stamp duty is required.

With the unrelenting COVID-19 pandemic, urgency is at the heels of every sector to realign with the new status quo. This realignment will embody a more digital element that will take the form of more virtual offices, which many consulting firms have already established, and the use of electronic platforms to stay connected and viable. Consequently, the Caribbean Network of Service Coalitions has supported national Caribbean coalitions with training on virtual software platforms. Despite this, more changes will come, and the sector must be ready to adapt and refocus even more to survive during and post-COVID-19.

Furthermore, networking, collaboration and cooperation is even more vital at this time within the consultancy field. Consultants need to create synergies in supporting business recovery and growth towards business continuity. Consultants must be updated on new methodologies required for the execution of their service and gain accreditation to attract and successfully fulfil the requirements of competitive bids. If management consultancy firms are unable to innovate and adapt to the new norm, they will be unable to properly advise other businesses.



Photo credit: Dionne Chamberlain Consulting

**NETWORKING,
COLLABORATION
AND COOPERATION
IS EVEN MORE
VITAL AT THIS TIME
WITHIN THE
CONSULTANCY
FIELD.**

TRADE IN SPORTING SERVICES.

BELIZE

The global sports market was valued at approximately US\$480 billion in 2018, having grown at a compound annual growth rate (CAGR) of 4.3% since 2014, and is expected to grow at a CAGR of 5.9% to reaching nearly US\$614 billion by 2022.



By Tricia Gideon

Trade Economists, CARICOM/ CSME Unit,
Directorate General for Foreign Trade (DGFT)

Photo credit: National Sports Council of Belize

In 2017, the European Union (EU) 28 Member States spent €51.3 billion of government expenditure on recreation and sport, and the ratio of government recreation and sport expenditure to total expenditure varied across EU Member States with the highest share of expenditure on recreation and sport in Hungary. The lowest was Croatia. [1] The United States of American (USA) has the biggest market sector for sporting services, amounting to US\$31.83 billion with real personal consumption expenditures on sports and recreational goods and related services totalling US\$229.201 million in 2018. [2] Despite unfavourable climate changes and shortages of sport professionals, between 2014 and 2018, market growth and rapid urbanization contributed to the growth in the sporting sector. Going forward, increasing sports sponsorships, growing popularity of sports, economic growth, an increase in the number of internet accessible devices, and the emergence of multiple sports channels to capture viewership will drive growth. [3]

[1] Eurostat, (2019, November 23). How much do governments spend on recreation and sport? Retrieved 20 July 2020 from <https://ec.europa.eu/eurostat/web/products-eurostat-news/-/EDN-20190923-1>

[2] U.S. Bureau of Economic Analysis, Real personal consumption expenditures: Sports and recreational goods and related services: ther sporting and recreational goods. Retrieved 20 July 2020 from FRED, Federal Reserve Bank of St. Louis from <https://fred.stlouisfed.org/series/DORIRX1A020NBEA>.

[3] Business Wire (2019, May 14). Sports - \$614 Billion Global Market Opportunities & Strategies to 2022 - ResearchAndMarkets.com. Business Wire. Retrieved from <https://www.businesswire.com/news/home/20190514005472/en/Sports---614-Billion-Global-Market-Opportunities>

[4] Jaitman, L and Scartascini, C. (2017, December). Sports in Development. Retrieved 20 July, 2020 from <https://publications.iadb.org/publications/english/document/Sports-for-Development.pdf>

In the Caribbean and Latin American, expenditure on sports is modest. According to the Inter-American Development Bank (IDB) 2017 report, the Caribbean lags in sports pending and points to fiscal budgets from 17 countries in Latin America and the Caribbean which shows that government spending on sports averages around 0.1 per cent of gross domestic product (GDP). The region's spending on sports is about one-third of the percentage spent by European nations, without considering special programmes for elite athletes or Olympic financing. The report also argues that the region needs to spend more on sports, not only to produce better athletes but also to foster happier, safer, and healthier societies.

The report notes that sports can enhance productivity by improving physical and mental health, discouraging substance abuse, and inspiring athletic and academic achievement. According to the World Health Organization (WHO), the prevalence of physical inactivity is estimated to be 35 per cent higher in women than in men worldwide, and 41 per cent higher in Latin America and the Caribbean. Almost one in four adults in Latin America and the Caribbean qualify as obese that is a body mass index of 30 per cent fat or higher and more than half are overweight. Within Latin America and the Caribbean, Caribbean countries are the least active. According to the report, in Brazil, salaries of physically active individuals are between 15 per cent and 31 per cent higher than those of sedentary counterparts. In the United States, sports participation also generated a one percentage point increase in female college attendance and a one to two percentage point rise in female labour force participation. [4]



Photo credit: National Sports Council of Belize

Sporting services are traded on the international market through four modes. The first mode is cross-border supply of sporting services which covers e-sports to consumers via the internet. The second mode is the consumption of sporting services abroad which refers to fans who travel to experience a live game or to consume any form of sporting services. The third mode is commercial presence which refers to the commercial establishment of a sports firm abroad, either in the form of a local branch or a subsidiary. The fourth mode covers individuals travelling from their own country to supply services in another, for example, a coach or athlete.

[1] World Trade Organization W/120 sectoral classification: Business Services; Communication Services; Construction and related Engineering Services; Distribution services; Educational Services; Environmental Services; Financial services; Health related and Social services; Tourism and Travel Related Services; Recreational, Cultural and Sporting Services; Transport Services; other services not included elsewhere.

[2] World Trade Organization (2020) I-TIPs database. Retrieved 20 July 2020 from <http://i-tip.wto.org/services/SearchResultGats.aspx>. Afghanistan, Albania, Angola, Armenia, Australia, Bolivia, Plurinational State of Cabo Verde, Central African Republic, Costa Rica, Cuba, Democratic Republic of the Congo, Djibouti, Dominica, European Union 25, Ecuador, The Gambia, Georgia, Grenada, Iceland, Japan, Jordan, Kuwait, the State of Kyrgyz Republic, Liberia, Liechtenstein, Malaysia, Moldova, Republic of Montenegro, North Macedonia, Peru, Rwanda, Saint Kitts and Nevis, Saint Lucia, Saint Vincent and the Grenadines, Senegal, Sierra Leone, Switzerland, Chinese Taipei, Thailand, Trinidad and Tobago, Ukraine, United States of America, Venezuela, and Bolivarian Republic of Vietnam

In July 1991, the World Trade Organization (WTO) Secretariat compiled a services sectoral classification list (W/120) to ensure Member States comparability and consistency in commitments undertaken at the WTO. This is a list of services sectors and sub-sectors covered under the General Agreement on Trade in Services (GATS). [1] However, the 160 sub-sectors are less detailed than the categories contained in the United Nations Provisional Central Product Classification (CPC). Many countries have made commitments in sporting services which are classified under the subheading Sporting and other recreational services (964). In 2020, a total of 44 countries have made commitments under this subheading. [2]

Belize did not make any commitments in sporting or recreational services at the WTO, but sports is played in communities across the country for leisure, recreational and competitive purposes. Throughout the country, tournaments and competitions in various disciplines - football, basketball, volleyball, and cycling, among others- are organised regularly with participation of athletes and the engagement of sports fans. Belize, through the Ministry responsible for Sports and the National Sports Council, developed a National Sports Policy entitled Contributing to the Realisation of National Development Goals HORIZON 2030 through sports (2016 - 2025). The policy is built around three thematic areas: sporting for all, sporting for excellence, and sporting for development.

SPORTS &
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To further develop standards to support the implementation of the National Sports Policy, the Sports Council has partnered with a few national federations to commence quarterly meetings to ensure harmonization within the sector. One such partnership has been in the form of Memorandum of Understandings (MOUs) which has enabled the Sports Council to pool resources. Currently, a MOU with the Football Federation exists, and there are plans to draft MOUs with other associations including the Volleyball Association and the national secondary sporting associations. Partnerships have also been forged with international organizations, such as the Pan American Sports Organization (PANAM Sports), the International Federation of Football Association (FIFA) which assists with training in coaching, and the Central American Integration System (SICA), under which Belize collaborates with The Central American Council of Sports and Recreation (CODICADER) to participate in Central American games.

Sporting facilities are key in the development of sports and athletes in Belize. Currently, two sporting facilities meet international standards: the CIVIC Centre in Belize City and ISIDORO BEATON in the City of Belmopan. Unfortunately, it is costly for people to access stadiums that meet international standards, which prohibits many persons to readily access these and to fully maximize its use

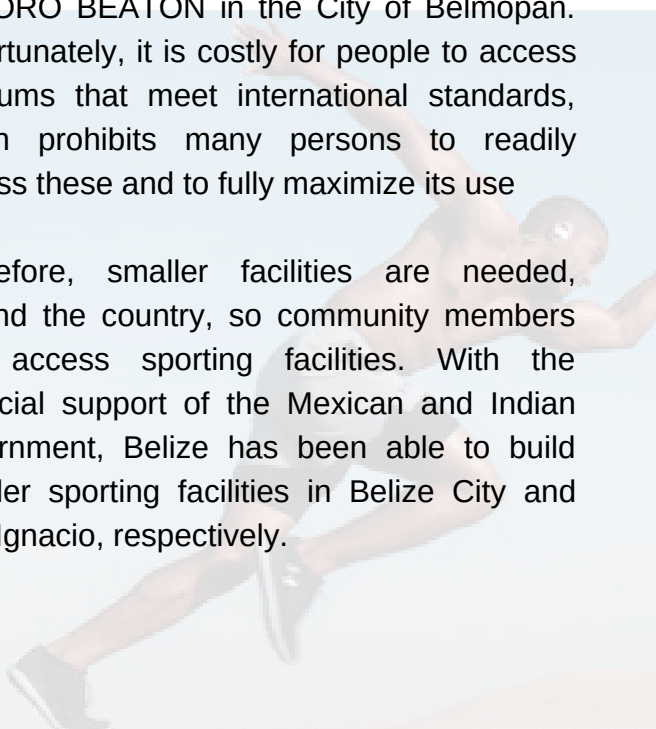
Therefore, smaller facilities are needed, around the country, so community members can access sporting facilities. With the financial support of the Mexican and Indian government, Belize has been able to build smaller sporting facilities in Belize City and San Ignacio, respectively.

Given the contribution of sports to individuals, communities and national development, the Ministry of Education also has a responsibility to: 1. include health, physical and sports education in the school curriculum; 2. identify centres of excellence for the delivery of sports for the development of emerging talent, regardless of age, gender, physical or mental ability, social status, ethnicity or political or religious convictions; 3. collaborate with the National Sports Council, representatives from national sporting organizations and school sport organizations to prepare teachers to deliver health, physical and sports education in schools through development of appropriate certificate, diploma or other programmes; and 4. to implement programmes and competitions for schools. [7].

Many developing countries struggle to identify funding for essential services and have very little left to allocate to seemingly less important services, for example sports. With an annual budget of BZ\$2.2 million, the Sports Council, formed 31 December 2000, is responsible “to promote, develop and improve the knowledge and practice of sports in the interest of the social well-being of and the enjoyment of leisure by Belizeans...” [8]

[7] Government of Belize. The National Sports Policy. Contributing to the realisation of National Development Goals HORIZON 2030 through sports (2016 - 2025). Retrieved 20 July 2019 from https://www.sportanddev.org/sites/default/files/downloads/the_belize_national_sports_policy_2016_-_2025_pdf-min.pdf

[8] Sports Act Chapter 46 Section 6 (a). Retrieved on 20 July 2020 from <http://www.belizelaw.org/web/lawadmin/PDF%20files/cap046.pdf>





Athletic Performance

Additionally, it receives duty exemptions upon request from the Ministry of Finance for sporting equipment, inputs or building material relevant to the sporting services. However, with 26 sporting facilities, 110 staff, and management of primary school sporting tournaments country-wide, very little is left to adequately fund existing programmes or new programmes. Part of the sporting budget comes from the revenue of lottery funds which contributes \$240,000 per year to the sport's council budget. With most of its budget allocated to operational expenses, the Sports Council needs financial, human resources, and technical assistance over a five-year period for the development of innovative sports programmes that reflect the needs of the community. Limited funding affects participation and competition in international events, marketing and branding of sporting services in Belize, professional sports coverage, as well as reliable data to monitor athletes' progress, and the ability to attract and retain qualified persons in sports management.

The IDB 2017 report states that programmes with the best intentions that are not well designed and monitored could have unintended negative results. The report further states that sporting programmes can increase the prevalence of unacceptable behaviours, such as substance abuse and violence. [9] WADA is a foundation initiated by the International Olympic Committee based in Canada to promote, coordinate and monitor the fight against drugs in sports. In August 2018, the National Anti-Doping Organization (NADO) in Belize was suspended by the World

[9] Jaitman, L and Scartascini, C. (2017, December). Ibid

Anti-Doping Agency (WADA) because not enough was being done to combat doping in sports in Belize. The ban has since been lifted and an anti-doping office is housed at the Sports Council. However, Belize needs assistance to implement the provisions of the WADA Treaty and to finance the operation of the anti-doping office. Currently, the operational expenses of the national anti-doping office falls under the responsibility of the Sports Council. To further support the work of the unit, closer testing labs are needed. Samples are currently processed by the University of California, Los Angeles (UCLA) and Cuba's laboratory testing facilities.

Despite these challenges, opportunities exist for the sporting sector to thrive. Greater use of technology to capture and measure athlete's performance will need to be employed by the Sport's Council and sports organizations and promote the sector as a viable and lucrative business. Opportunities exist in the region as well. Under the CARICOM Single Market and Economy (CSME), sportspersons can live and work in the 13 CSME participating Member States. [10] Sportsperson for the purpose of movement among the Caribbean are persons who are active in or qualified to enter a field of sports with the specific purpose of earning a living as a professional or semi-professional. Such persons perform functions such as but not limited to athlete, coach team leader, sports manager and promoter, massage therapist and events manager.

[10] Antigua and Barbuda, Barbados, Belize, Dominica, Grenada, Guyana, Haiti, Jamaica, St. Kitts and Nevis, St. Lucia, St. Vincent and the Grenadines, Trinidad and Tobago and Suriname.

Photo Credit: Tomas Gongora Photography



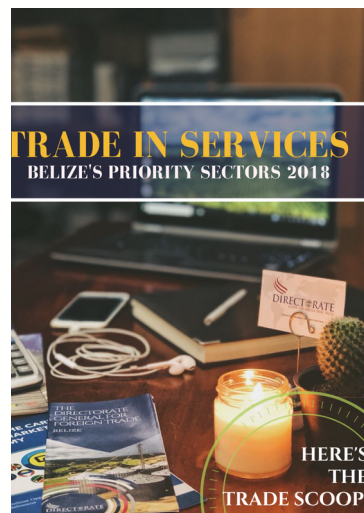
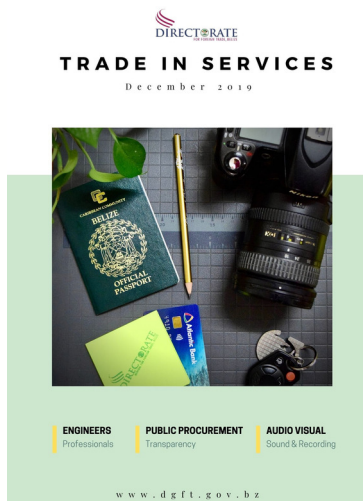
THE WAY FORWARD

**"TO USE
TECHNOLOGY
TO EXPERIENCE
THE GAMES
LIVE..."**

To gain the benefits from sports, Belize must be prepared to invest more in the sector, through the creation of programmes that reflect the needs of society as well as through improved marketing strategies. The benefits from participation in sports are numerous: from improving cognitive functioning and physical health, to character and moral development, instilling respect, honesty and fair play, and building a sense of community. A major unforeseeable factor impeding growth in the sporting sector is the pandemic caused by COVID-19. With many sporting activities suspended or cancelled to limit the spread of the disease, every aspect of the sporting value chain has been affected negatively: athletes, leagues, fitness studios and the media that covers sporting events. This combined with the threat from home entertainment, can weaken the sector even more. However, opportunities can emerge, if the sector is able to capitalize on the increase in media consumption and find innovative ways to engage fans and allow them to use technology to experience games live and remain physically active without having to be physically present in a gym or stadium. Identifying the right approaches will allow the sector to emerge from this crisis stronger and with greater demand.

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