Market Intelligence Brief

Qatar

2019/2020

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1. QATAR AT A GLANCE

Market background

- After a slowdown in economic growth to its lowest rate in two decades in 2017, Qatar's economy had more or less recovered by 2019. According to the IMF, Qatar experienced 2 per cent growth in 2019, up from 1.5 per cent in 2018, and is expected to see 2.8 per cent growth in 2020.
- While the 2017 diplomatic rift – when four Arab neighbours severed diplomatic and trade ties with Qatar – initially resulted in a slowdown in economic activity, the impacts appear to have been temporary. Diversification of import sources and establishment of new trade routes (supported by the opening of a new deep-water port) and expenditure related to the 2022 FIFA World Cup all helped the Qatar economy rebound.
- Qatar's economy has undergone extensive liberalisation since the early 2000s, including legal reforms and business development initiatives. The 2020 budget prioritises infrastructure and major projects, healthcare, wages, and housing. The country also aims to diversify away from oil, attract foreign direct investment, and develop knowledge-intensive sectors.

Local education trends

- The current Education and Training Sector Strategy (2017-2022) focuses on four main pillars of enrolment, attainment and achievement, citizenship and values, and labour force. Five of the main goals are: raising the quality of early education; developing Qatar's national education curricula, establishing a comprehensive quality management system for public and private schools; improving the institutional performance of the MEHE; and raising the quality of services provided to stakeholders.
- In 2018, 33,668 tertiary level students were enrolled in Qatar, up from 13,800 in 2010.[1] The size of the student age population is expected to remain broadly stable over the medium term.
- Qatar has a relatively low gross tertiary enrolment ratio of just under 18 per cent.[2] While this measure of participation is skewed by the large expatriate population, the low rate of progression from secondary to tertiary education, especially for males, is a concern for policymakers.

1 Outbound Students from Qatar, *UNESCO Institute for Statistics*, 2018.

2 Global Student Flow, *UNESCO Institute for Statistics*, 2019.

International education

- In 2017, 6,523 tertiary students from Qatar travelled overseas to study, representing a marginal increase of 1.4 per cent over the previous year.[3] The number of students from Qatar studying abroad has risen steadily from 1,211 in 2000, but is expected to have temporarily fallen in 2018, due to implementation of longer national service requirements.
- There were 2,860 students from Qatar enrolled in UK HEIs in 2017/18, a 13 per cent increase from the previous year. Of these students, 28.5 per cent were on government scholarships. The UK is the main English-speaking destination country for students from Qatar and is likely to remain so for some time.
- Qatar has one of the highest outbound mobility ratios, at 20 per cent in 2017, far higher than the GCC average. The limited capacity of Qatar's domestic HE sector has encouraged study abroad. In 2017/18 Qatar had a total of 2,530 students enrolled on UK TNE programmes, including distance learners and students in an accounting program run by Oxford Brookes University.

3 Global Student Flow, *UNESCO Institute for Statistics*, 2018.

2. INTRODUCTION

Qatar is a peninsular country home to 2.8 million people located on the Persian Gulf. It gained independence from Britain in 1971 and has since exploited its oil and gas reserves to become one of the wealthiest counties in the world per capita. More than half of the country's population resides in the capital city of Doha, the economic and cultural centre known for its futuristic architecture. With its vast wealth, successful bid to host the 2022 FIFA World Cup, five-star airline (Qatar Airways) and global media network (Al Jazeera), Qatar has expanded its regional and global influence in recent years.

In June 2017, Saudi Arabia, Bahrain, Egypt and the UAE severed diplomatic ties with Qatar, accusing the administration of supporting terrorist groups, and imposed a travel and trade embargo that is still in place as of April 2020. The initial economic and financial impacts on Qatar appear however to be fading, as new trade routes were quickly established and higher energy prices and infrastructure projects supported economic growth. The regional political situation nonetheless remains fragile and concerns exist regarding the long-term impact of the embargo on Qatar and the rest of the Arab region.

Qatar's economy has undergone a process of liberalisation since the mid-1990s and now scores in the 'very high' category of the UN's Human Development Index, along with Gulf Cooperation Council (GCC) neighbours Saudi Arabia and UAE. Qatar has taken some steps towards democratisation since the mid-2000s but remains a politically and socially conservative state. Qatar is supported by a large, predominantly male, migrant workforce and 'non-Qataris' represent about 90 per cent of the country's population.

The country has a favourable regulatory and policy environment for the internationalisation and digitalisation of its education system and has longstanding – if only partially realised – ambitions to become a regional education hub. The Qatar Foundation has operated a dedicated education zone called Education City since 1997, where eight international branch campuses are currently located.

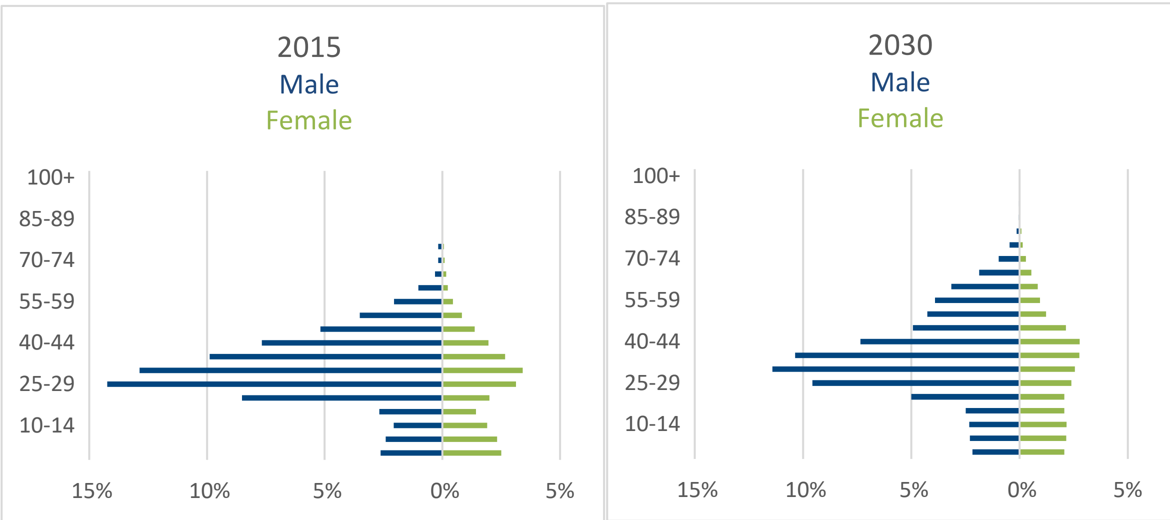
Qatar has only two domestic universities (one public and one private) and its education sector is relatively small in scale, with little more than 33,600 students enrolled in tertiary education in 2018. It has a high outbound student mobility rate driven by limited domestic education capacity, high disposable incomes, and availability of funding sources for study abroad including generous scholarship programmes. The UK is the main destination country for outbound students, followed by the US, and recruitment numbers have grown steadily from 600 in 2007 to 2,860 in 2017 (fourth highest of the six GCC countries, behind Saudi, UAE and Kuwait).

Qatar is a wealthy, urbanised country with an international outlook, growing demand for overseas study and strong links with the UK. While the outlook for student recruitment remains positive, a number of challenges exist, including: small market size with limited growth potential; relatively low (but improving) English language competency; uncertainty associated with the ongoing embargo; and some concerns relating to political and academic freedom.

3. DEMOGRAPHICS

Qatar's small population has doubled in size since 2008 to reach 2.8 million in 2019 and is expected to increase to 3.2 million by 2023. The explosive growth is largely owed to an influx of migrant workers – reaching nearly 1.9 million in 2019 – that has also caused structural changes in the population.[4] However, the rapid changes in demographics have caused problems for the Qatari government in terms of planning and development, as noted in the National Development Strategy 2018-22 "the demographic provisions are vague... this makes the planning process difficult. The high and unsustainable level of population growth is primarily due to the continued large influx of foreign workers... there has also been a noticeable increase in the influx of expatriate families with school-age children".[5]

Figure 1: Qatar's population pyramid, 2015 and 2030



Source: UN Population Division

In 2019, Qatari nationals accounted for a mere 10.5 per cent of the total population.[6] In total, non-nationals account for 90 per cent of the population, with Indians, Bangladeshis, Nepalese, Filipinos, and Egyptians among the largest groups.[7] As migrants are predominantly working-age males, there is a sharp gender imbalance, with females representing just one quarter of the population.[8]

The fertility rate has fallen from 3.0 children per woman in 2002 to 1.9 in 2017, which is comparable to the UK rate of 1.8 but below the global average of 2.4. The decrease in fertility is attributed to the higher educational attainment of women in Qatar, preference of career over marriage and children, and increased reluctance to marry early. Despite the falling fertility rate and the fact that women account for only one quarter of the population, the overall population is forecast to grow at a steady rate, supplemented by further waves of migrants in the coming years.

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4 "World Population Prospects", United Nations Population Division, 2019; Revealed: hundreds of migrant workers dying of heat stress in Qatar each year, The Guardian, 2 October 2019.

5 "Qatar's Second National Development Strategy, 2018-2022", Government of Qatar, 2018; Qatar Planning and Statistics Authority, 2019.

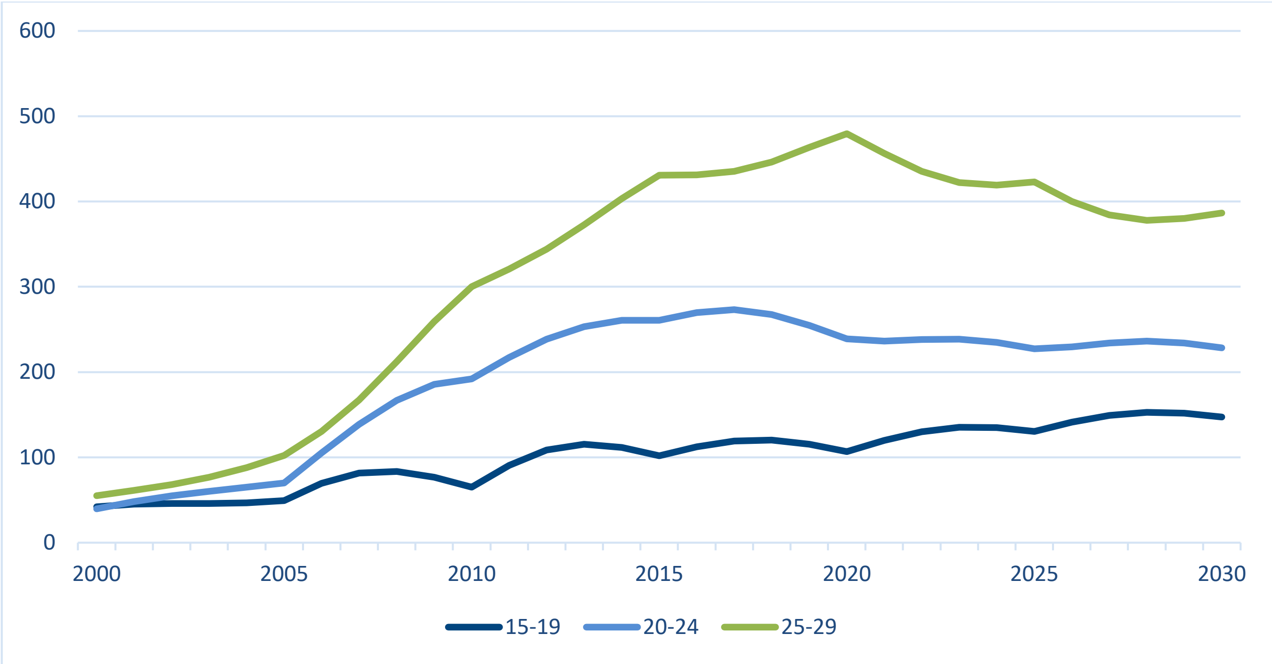
6 "Population of Qatar by nationality - 2019 report", Priya DSouza Communications, August 15 2019.

7 "Population of Qatar by nationality - 2019 report", Priya DSouza Communications, August 15 2019.

8 "Qatar Census 2015", Government of Qatar, 2015.

According to September 2019 data from Qatar's Planning and Statistics Authority, 25.8 per cent of the population was under 25 years of age.[9] This demographic is expected to contract to 25 per cent by 2030 as the population ages (see Figure 1).[10] In 2015, the median age was 31.5 years, with prospects of rising to 32.3 in 2020, making it the third-highest median age among GCC states behind Kuwait and the UAE.[11]

Figure 2: Qatar's student age population



Source: UN Population Division

Qatar's student age population (ages 15-29) is expected to remain broadly static over the next 10 years. Falling fertility rates are offset by inflows of immigrant workers, particularly among white-collar workers who are more likely to bring their children. Figure 2 shows that the UN expects the population aged 15-19 to grow steadily while the 20-24 and 25-29 age groups are expected to moderately decline in the coming years. However, given the high proportion of immigrants in these age cohorts, of whom only a small proportion study abroad, it's difficult to gauge the prospects for recruitment of students from overall population trends. On balance, the prospective market for recruitment of international students is expected to remain fairly stable over the medium term.

Islam is the official religion in Qatar, and most Qatar nationals are Sunni Muslim. However, the large immigrant population means other major religions, including Hinduism, Roman Catholicism and Buddhism, are prominent among the non-national population. Arabic is the official language, although English is commonly used as a second language and migrants have brought a range of languages to the country such as Urdu, Tagalog, Hindi and Malayalam.

9 Qatar Planning and Statistics Authority.

10 "World Population Prospects", *United Nations Population Division*, 2019.

11 "World Population Prospects", *United Nations Population Division*, 2019.

4. ECONOMICS

Qatar is one of the richest countries in the world. Thanks to its extensive oil and gas reserves, it has experienced many years of strong GDP growth. However, the reliance on the hydrocarbon sector means that growth fluctuates with global energy prices and the periods of expansion in gas exports. In 2010, for example, GDP growth leapt to 18 per cent thanks to a surge in oil prices and higher gas exports, but then dropped in 2012 as a gas expansion project was completed. After the Saudi-led coalition's diplomatic and trade embargo on Qatar in June 2017, GDP growth dropped to 1.6 per cent, the lowest growth rate since 1993, before dropping further to 1.5 per cent in 2018.[12] However, growth recovered slightly in 2019 with projected 2 per cent growth, and the IMF projects 2.8 per cent growth for 2020.

In March 2020, a major drop in oil prices was compounded by the COVID-19 pandemic, causing financial problems for the major oil-producing countries. Qatar issued a US$23 billion stimulus package to support its economy in response to the pandemic, but the potential global recession will cause the hospitality, aviation, and tourism sectors to take a severe hit. The Qatar government is also expected to ramp up spending for relief measures.[13] In April 2020, Moody's Investors Service changed its outlook for the banking system in Qatar and other GCC countries from stable to negative due to the oil price collapse and the coronavirus outbreak.[14]

While the embargo initially resulted in an alarming drop in imports and a sharp fall in the stock market, Qatar's economy recovered in late 2017. According to the World Bank, the winding down of a boom in gas exports has also contributed to slowing economic growth, but the outlook for the medium term is upbeat, with a forecast average annual growth of 2-3 per cent over the medium term.[15] While this is far lower than average growth in recent years, it may represent a more sustainable level of the growth in the long run.

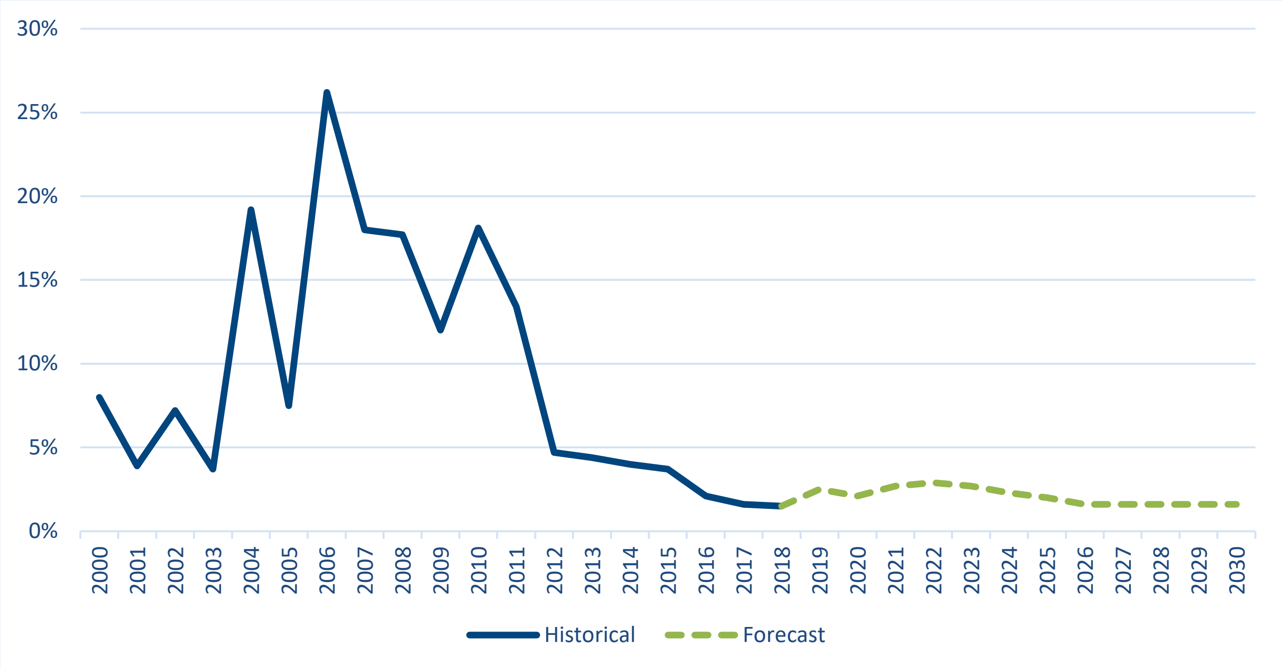
12 Qatar Country Data, *International Monetary Fund*, January 2019.

13 Qatar lines up bond deal as virus and oil crash hit economy, *Financial Times*, 2 April 2020.

14 Research Announcement: Moody's changes outlook on five GCC banking systems to negative, *Moody's Investor Services*, 2 April 2020.

15 "Qatar Economic Update", *World Bank*, October 2019.

Figure 3: Real GDP growth per annum



Source: IMF, Euromonitor forecasts

The annual inflation rate is expected to have been -0.4 per cent in 2019 and is projected to rise to 2 per cent in the coming years.[16] The expected implementation of a VAT was not mentioned in the 2020 budget after the government said that it needed more time to assess the effects of a VAT.[17]

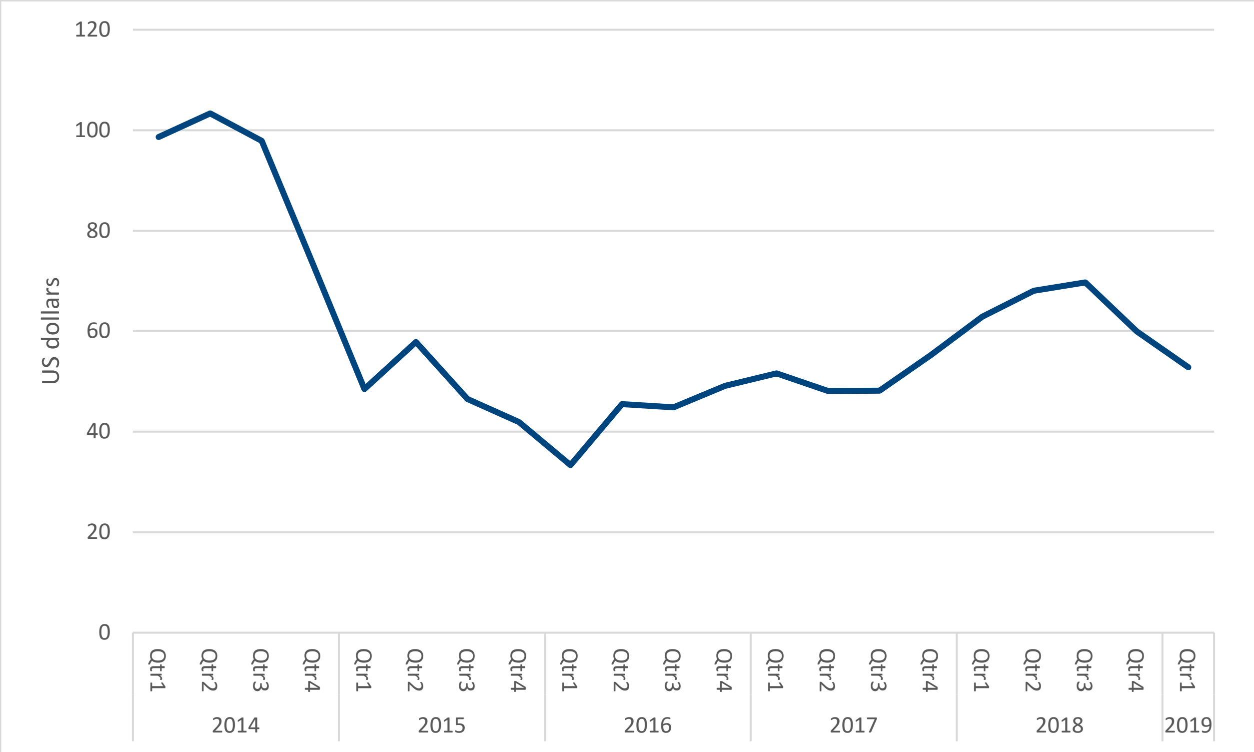
Qatar has vast oil reserves, but because it is also home to the world's largest natural gas reserves, the necessity for economic diversification is not as dire as in other GCC countries. Qatar aims to be one of the world's top energy suppliers and massive infrastructure projects for the hydrocarbon sector are underway, particularly for increasing natural gas liquefication capacity by more than a third. This sector is always subject to fluctuating oil prices, as can be seen in Figure 4.[18] The drop in world energy prices beginning in 2014 caused Qatar's economy to slow considerably, resulting in the country's first budget deficit in 2016. While prices have since risen, if they stay below the 2014 peak there will likely be broader impacts on the national budget. Because Qatar has a small population and substantial financial reserves, it is positioned to be able to weather fluctuations in hydrocarbon prices.

16 Qatar Country Data, *International Monetary Fund*, January 2019.

17 Qatar announces 2020 budget, its biggest in five years, *Al Jazeera*, December 17, 2019.

18 "Crude Oil Prices – 70 Year Historical Chart", *Macro Trends*, February 2019.

Figure 4: Oil price per barrel (WTI) – five-year historic trend



Source: US Energy Information Agency

Qatar has made significant efforts to diversify its economy, and in late 2014 the non-hydrocarbon sector accounted for more than 50 per cent of the economy for the first time. This was driven by major infrastructure projects in education, health and transportation, as well as rising consumer demand from the growing population.[19] Likewise, ongoing projects related to the Vision 2030 development plans and the 2022 World Cup are also driving growth. The government aims to reduce its dependence on hydrocarbon industries and efforts to attract new foreign direct investment in non-energy sectors such as manufacturing, tourism, finance, sports and agriculture are a priority.

Under Qatar National Vision 2030, the government aims to fund the public budget with non-hydrocarbon revenues and invest heavily in healthcare, education, infrastructure, and research. Although the lack of water and cultivable land is a limitation, desert reclamation and high-tech industrial farming are seen as options for the future. The creation of special economic zones, including Education City and the Qatar Business Incubation Centre provide support services for entrepreneurs and companies wanting to start or grow a business.

The national budget for 2020 anticipates US$58 billion in expenditure, the highest in five years, and a budget surplus of US$138 million.[20] "Major projects," which includes projects in health, education, and the 2020 World Cup, accounts for almost 43 per cent of total expenditure. The budget allocation to 'salaries and wages' increased 3.3 per cent from 2019 to US$16 billion, and the healthcare sector accounted for 11 per cent of total expenditure with just over US$6 billion.

The currency in Qatar is the Qatari riyal, which has been pegged to the US dollar since 2001 at a fixed exchange rate of US$1 = QR3.64. The diplomatic crises of summer 2017 caused the riyal to temporarily weaken (reaching 3.83 in November 2017), requiring the government to allocate US$50 billion from the country's sovereign wealth fund to defend the currency. The currency stabilised by the end of 2017 and

19 "Amir: 'Non-oil sector main driver of Qatar economy'", *The Gulf Times*, September 7 2018.

20 Qatar unveils surplus 2020 annual budget, *The Peninsula*, 17 December 2019.

is expected to remain at 3.64 over the medium term owing to Qatar's continuing ability to maintain the peg via its income from energy exports and vast foreign exchange and gold reserves.

Qatar ranked 29th out of 141 countries in the World Economic Forum's (WEF) 2019 Global Competitiveness Index, scoring high on ICT adoption and product market but low on labour market, corporate governance, and in checks and balances.[21] In the World Bank's 2019 'Ease of Doing Business' report, Qatar is ranked 83rd out of 190 economies, scoring high on: paying taxes, starting a business, and registering property; but scoring low on protecting minority investors, resolving insolvency, and enforcing contracts.[22]

21 "Global Competitiveness Report", *World Economic Forum*, 2019.

22 "Doing Business 2019", *World Bank*, 2019.

5. POLITICS AND POLICYMAKING

Qatar has been ruled by the Al Thani family since it became independent from Bahrain in 1868. It was a British protectorate in the 20th century, and in 1971 it became independent, electing not to join the United Arab Emirates. Today, Qatar is ruled by Sheikh Tamim bin Hamad Al Thani, who became the emir in 2013 after his father's abdication. Though the country is formally a constitutional monarchy, the emir exercises executive power and can approve or reject legislation after consultation with an Advisory Council. The emir has the power to appoint the prime minister and approve the formation of the Council of Ministers upon a proposal by the prime minister. In January 2020, Khalid bin Khalifa bin Abdul Aziz Al Thani was appointed as prime minister. The current emir and his father studied in the UK.

Qatar officially subscribes to Wahhabism, a conservative creed within Sunni Islam, and the ruling Al Thani family claims descent from an Arabian tribe to which the founder of Wahhabism belonged. Thus Qatar's legal system is a mix of civil law and sharia (Islamic law). Sharia is applied to laws relating to family and inheritance disputes, as well as several criminal acts.

Elections are currently only held for a 29-seat Central Municipal Council, which advises the Minister of Municipality and Urban Affairs on local public services. All candidates for municipal elections run as independents and serve four-year terms. The most recent elections were in April 2019, but voter turnout was lower than expected, possibly because citizens view this council as lacking influence.

The Shura council is the main legislative body of Qatar and is set to also begin having elections. It has the ability to remove ministers by a two-thirds majority vote, approve the national budget, and draft and vote on proposed legislation. Up to now, elections have not been held for the council, despite the 2003 constitution stating that 30 of the 45 seats on the Shura Council should be elected by public secret ballot. The first elections were originally scheduled for 2013 but have been postponed multiple times. In late October 2019, Qatar's emir ordered a new committee be established to organize the Shura Council elections, chaired by the prime minister, in what appeared to be the first concrete step towards holding the historic vote.[23]

The country has tense relations with its Gulf neighbours due to its support for Egypt's Muslim Brotherhood and its Al Jazeera media network. In June 2017, Saudi Arabia, Egypt, Bahrain and the UAE severed diplomatic ties with Qatar and accused the country of supporting the Muslim Brotherhood, which these countries consider to be a terrorist group. The Saudi-led alliance imposed a travel and trade embargo, closing the only land border with Qatar and severely impacting air travel, while demanding Qatar cut ties with Iran and shut down Al Jazeera. The ongoing boycott is unlikely to undermine the Emir's domestic political standing, even as the rhetoric increases amid Saudi's plan to replace the land border between the two countries with a 200-metre-wide canal, which would in effect transform Qatar into an island. In response to the embargo, Qatar deepened ties with Turkey and Iran.

In December 2018, Qatar announced that it would be leaving OPEC (a bloc of 14 oil-rich countries) as of 1 January 2019, in order to focus on LNG production. This was widely considered to be a response to the current political tensions in the Middle East and as also a largely symbolic move as Qatar's strength is in natural gas rather than oil. Saudi Arabia, the driving force behind the continuing trade embargo, is also a leading member of OPEC.

Qatar, like the other GCC states, is reliant on the United States for external security and hosts 11,000 U.S. and coalition forces. The US considers Qatar of strategic regional importance, not least because it has positioned itself as a regional power broker. It maintains links with radical groups such as The Muslim Brotherhood and Hamas, A sticking point for Qatar's regional neighbours.[24] It is ranked 128 out of 167 countries on the EIU Democracy Index 2019, the second highest among the Gulf countries.

[23] Qatar: Governance, Security, and U.S. Policy, *Congressional Research Service*, 11 March 2020; Qatar Takes Step Towards First Shura Council Election: QNA Agency, *Reuters*, 31 October 2019.

[24] Why Qatar is a vital U.S. security link in the Mideast, *USAtoday,* June 2017.

6. EDUCATION

Pre-tertiary education

The MEHE oversees Qatar's education system, which is accessible through state-run, independent, and private Arabic and international institutions. Twelve years of education are free at public schools, while compulsory schooling lasts nine years from age 6 to 14. Pupils complete six years of primary school followed by three years of lower-secondary (preparatory) and three years of upper-secondary, where there are limited specialised and technical and vocational education and training (TVET) options.

Education in Qatar has undergone extensive reform, rapidly expanding to meet the needs of the growing population. Students receive an average of 9.7 years of schooling, with females attaining an average of 11 years and males receiving 9.3 years.[25] The net enrolment rate in primary school has been very high for the last decade, reaching a high of 94 per cent in 2018 (rates are similar for males and females). The most recent statistic for secondary level net enrolment is from 2010, a strong 94 per cent.[26]

Overall performance in PISA 2018, released in December 2019, was below average across all subjects.[27] Performance improved only slightly from the 2015 PISA, but the general trend since 2006 has been upwards, with mathematics scores improving at one of the fastest rates among participant countries. Girls outperform boys in international tests such as PISA, TIMSS and PIRLS, and the gender gap in educational attainment is one of the largest in the world.[28] Improving learning outcomes for boys in particular, is a priority.

While school enrolments are increasing across all sectors, the fastest growth is in the private sector. In 2016-2017, 1,015 schools with private institutions accounted for 63 per cent of enrolments.[29] Among total registrations in 2017/18, 18 per cent were pre-primary, 49 per cent primary, 18 per cent lower secondary, and 15 per cent upper secondary.[30] Local Qataris account for one-third of all students, the majority of which are enrolled at government schools. Entry into desirable private schools is competitive, and the sector is a lucrative growth market; there is a shortage of quality places, and waiting lists are common. In response to growing demand, Qatar opened 13 new private schools in the 2018-2019 academic year, which have a capacity for around 6,000 students.[31] An additional five schools opened for the 2019 academic year, and two schools for children with special needs began taking students for the 2019/20 school year.[32]

In line with Vision 2030 which provides for the integration of ICT in education to enable the transition to a knowledge economy, Qatar became the first GCC country to implement a comprehensive e-learning programme in all state-funded schools in 2011. The plan has also digitised content in all its independent schools and aims to provide tablets to each student and teacher.

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25 Mean Years of Schooling, *UNESCO Institute for Statistics*, 201.

26 Qatar Country Profile, *UNESCO Institute for Statistics*, 2019.

27 PISA 2018 Insights and Interpretations, *OECD*, December 2019.

28 "Education for All: Global Monitoring Report", *UNESCO*, 2015.

29 "Qatari Private Schools List", *Ministry of Education*, 2019.

30 "Annual statistical: Chapter IV – Education statistics", *Ministry of Development Planning and Statistics*, 2017.

31 "13 new private schools to open this year: Official", *The Peninsula*, July 3, 2018.

32 Over 323,251 students, 34,218 teachers rejoin schools across Qatar, *The Peninsula*, 26 August 2019.

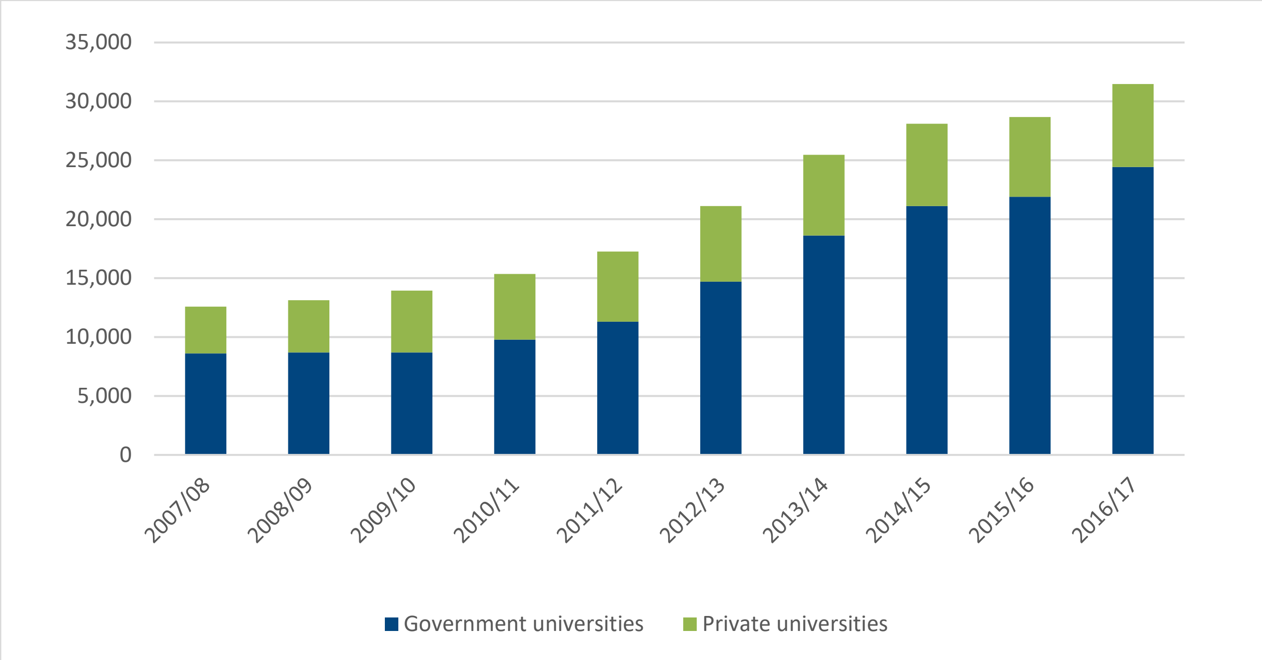
Higher education

Qatar has two state-run post-secondary institutions (Qatar University and Community College Qatar) and one domestic private university, Hamad bin Khalifa University.[33] In total, MEHE lists 16 HEIs operating in Qatar, of which 10 are international branch campuses located in Education City, a dedicated learning and research hub run by the Qatar Foundation on the outskirts of Doha.[34] About three quarters of students are enrolled in the public universities, and one quarter in branch campuses and private universities and colleges. Access to higher education is via the Qatar Senior Schooling Certificate (QSSC) or equivalent exams from international or independent schools.

Qatar University ranks among the top 500 of the 2019 THE World University Rankings (401-500), 87th in the THE Young University Rankings and 332 on the 2019 QS World University Rankings.[35]

Qatar University, College of Medicine charges an average of US$24,000 in annual tuition fees.[36] The international campuses in Education City charge the same tuition as their home campus – for example, Northwestern University charges US$56,000 per year.[37]

Figure 5: Domestic higher education enrolments



Source: Qatar Ministry of Education and Higher Education

In 2018, 33,668 students were enrolled in tertiary programmes, more than double in 2011.[38] Demand for education has increased as the population has grown, and secondary completion rates have risen, as well as capacity. However, the country has struggled with a low level of national enrolments and a high dropout rate, which may be because of a misalignment between the lower and tertiary level syllabi

33 "Higher Education Institutions and Academic Programmes Recognized by MOEHE in Qatar (2018-2019)", *Ministry of Education and Higher Education*, 2018.

34 "Higher Education Institutions in the State of Qatar", *Ministry of Education*, 2018.

35 QS World University Rankings, *Top Universities*, 2019.

36 "Tuition Fees", *Qatar University*, 2019.

37 "Tuition and Fees", Northwestern *University Qatar*, 2019.

38 *UNESCO Institute for Statistics*, 2018.

as well as a mismatch between tertiary education and the needs of a knowledge economy.[39] Currently, local students often need to complete foundation programmes before beginning overseas undergraduate programmes or TNE programmes in Qatar to meet entry-level demands.[40] The MEHE aims to provide educational support tools, in school and online, to help students overcome a reliance on private tuition. Among graduates of public colleges and universities, 74 per cent were female, whereas they make up 49 per cent of graduates in private colleges.[41] Business, administration and law are the most popular category of study among tertiary students, accounting for 26 per cent of graduates, followed by arts and humanities (24 per cent), engineering, manufacturing and construction (15 per cent), and social sciences, journalism and information programmes (11 per cent).[42]

Qatar currently spends less than 1 per cent of GDP on research and development, but this is expected to change with the strengthened commitment to research under Vision 2030.[43] Currently ranked 65 out of 126 economies on the Global Innovation Index 2019 – dropping 14 places from 2018 – Qatar is supported by a strong infrastructure, investment in human resources and academic/industry research collaborations.[44] Qatar ranks 72nd worldwide in research output, having seen its annual number of citable publications increase from just over 750 in 2010 to 3,550 in 2018, of which 81 per cent involved international collaboration.[45] The US is Qatar's main research partner, followed by the UK and China.[46]

Key policies related to education

The Ministry of Education and Higher Education (MEHE; formerly known as the Supreme Education Council) oversees the international aspects of Qatar's education system and is the main policymaking agency. The Ministry of Development Planning and Statistics is responsible for the development of an overall vision for the state, including preparation of national development strategies. The Ministry of Transport and Communications oversees the national ICT plan, including related e-education initiatives. The Qatar Foundation plays a key role in developing Qatar as an education hub via Education City and raising its international research profile via the Qatar National Research Fund.

Highlights of Qatar's education-related polices and initiatives include:

- **National Vision 2030** was launched in October 2008 and is a long-term strategy for the state to become a progressive society capable of sustainable development and of providing a high standard of living for all citizens by 2030. The plan prioritises the creation of a knowledge-based economy through innovation, entrepreneurship, excellence in education, high-quality infrastructure, efficient public services, and a transparent and accountable government.
- **National Development Strategy 2018-22** is the second comprehensive development strategy aimed at achieving the goals set out in Vision 2030. It is aimed at sustaining prosperity through infrastructure development, economic diversification and private sector development, including via promoting human development through high quality education and training.
- **National ICT Plan 2015: Advancing the Digital Agenda** is a five-year roadmap to create a sustainable digital future for Qatar. Under the plan the government is leading numerous e-education initiatives, including the deployment of learning management systems that allow students and teachers to share information and communicate online, which may support the provision of online education programmes. Despite previous attempts to define a national TVET

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39 "GCC Education Sector: A Growing Opportunity", *Ardent Advisory & Accounting*, 2015.

40 "GCC Education Sector: A Growing Opportunity", *Ardent Advisory & Accounting*, 2015.

41 "Annual statistical: Chapter IV – Education statistics", *Ministry of Development Planning and Statistics*, 2017.

42 Global Student Flow, *UNESCO Institute for Statistics*, 2017.

43 "Number of researchers in Qatar rises", *The Peninsula*, January 17 2018.

44 *Global Innovation Index*, 2019.

45 Qatar, *Scimagojr*, 2019.

46 "State of the relationship: UK higher education engagement with the Cooperation Council for the Arab States of the Gulf", Universities UK International, 2017.

policy and to establish governance structures (e.g. Qatar's Education and Training Sector Strategy 2011-2016 and the MEHE's own strategy), Qatar's TVET sector remains underdeveloped, and most vocational jobs are filled by relatively low-wage expatriate workers. In 2017, only 1.5 per cent of all upper secondary students were pursuing vocational education.[47]

In October 2018, the government approved a draft resolution to establish the National Commission for Qualifications and Academic Accreditation. The Commission aims to implement a national qualifications framework and apply academic accreditation and quality assurance standards to higher education institutions.[48]

The current Education and Training Sector Strategy (2017-2022) is focused on results, accountability and effectively integrating planning and execution, including implementing a National Qualifications Framework. It consists of five programmes: raising the quality of early education; developing national educational curricula; establishing a comprehensive management system for teachers and leaders of all schools; improving the institutional performance of the Ministry of Education and Higher Education; and raising the quality of services provided.[49]

The ETS Strategy is aligned with the National Development Strategy 2018-2022, which outlines key challenges as: matching human capital with labour market demands; addressing the limited TVET options; an insufficient number of graduates of knowledge economy disciplines, as well as their weak levels compared to international standards. The strategy also aims to increase the tertiary graduation rate among male and female Qatari students by 10 per cent by 2022, with a particular focus on maths, science, IT and engineering.

The 2012 Qatar National Research Strategy, updated in 2014, aims for Qatar be a leading centre for research and development excellence and innovation. The Qatar National Research Fund is the governmental funding body that supports both local and international researchers for projects that fit with Qatar's national research strategy. One of the four 'special' research projects so far was the 2015 Qatar-UK Research Networking Programme, which is designed to bring together a Qatar-UK bilateral cohort of early career researchers building links for future collaborations.

The National Priorities Research Program is the main funding program of the Qatar National Research Fund, and the primary means to support research that addresses Qatar's needs, primarily by supporting Qatari universities and colleges to attract, develop and retain skilled faculty members and researchers.[50] International funded projects awarded so far by partner country/region include: US (71), mainland Europe (53), UK (27), Canada (20) and Australia (10).[51]

International student recruitment

Overall outbound trend

Qatar has one of the highest outbound mobility ratios, at 20 per cent in 2017, far higher than the GCC average. The limited capacity of Qatar's domestic HE sector has encouraged study abroad. The wide availability of study funding sources, together with high levels of disposable income among the native Qatari population, supports outbound student mobility. As public and private HEIs in Qatar charge relatively high tuition fees, the cost differential between domestic study and study abroad is lower than for most other countries. In 2018, 6,523 students from Qatar were enrolled in overseas HE institutions, more than a fivefold increase since 2000.[52]

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47 Global Student Flow, *UNESCO Institute for Statistics*, 2017.

48 "Cabinet approved draft resolution to set up National Commission for Qualifications and Academic Accreditation", *The Peninsular*, 4 October 2018.

49 Education Ministry meet on 2017-2022 strategy, *Qatar Tribune*, Oct. 12, 2018.

50 Qatar National Research Fund, 2019.

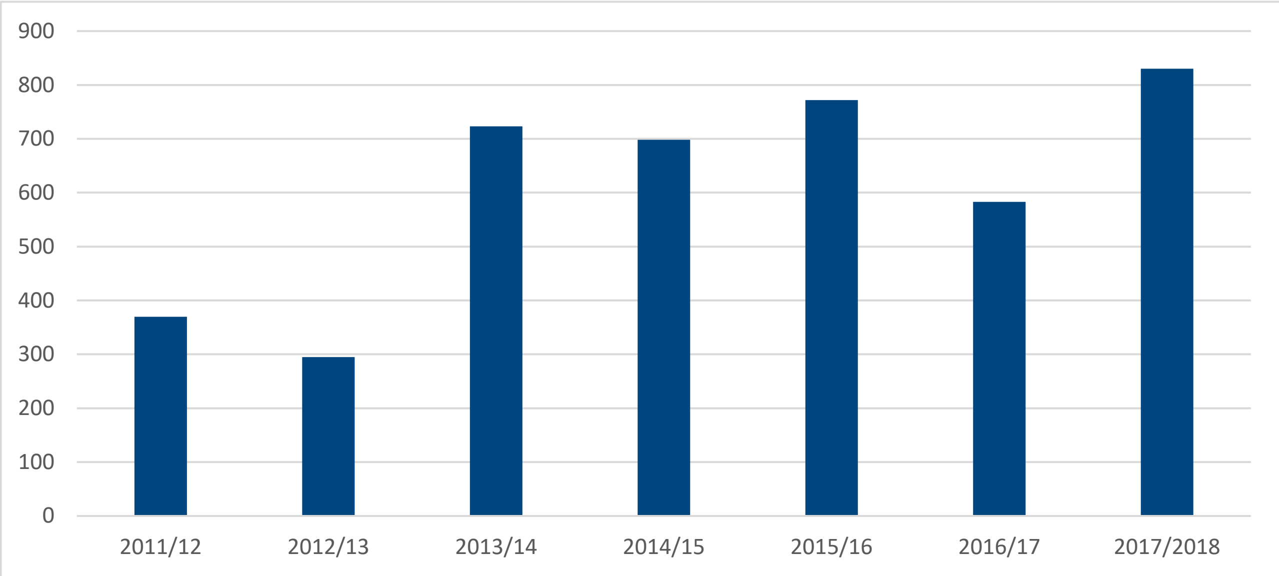
51 "Qatar puts the pursuit of knowledge front and centre", *Nature*, 2018.

52 Global Student Flow, *UNESCO Institute for Statistics*, 2017.

Students from Qatar may go overseas to approved institutions under a range of national scholarships, including those issued by the Qatar Foundation, Qatar Petroleum and the Ministry of Education and Higher Education (MEHE). MEHE maintains a list of approved institutions for scholarship students. Of the students in the UK in 2017/18, 28.5 per cent were on government scholarships.

Erasmus+ scholarships are available for students from Qatar, as are some comparable schemes from various governments in countries such as Australia (Endeavour Awards) and China (Confucius Institute Scholarship), though not the US Fulbright programme.

Figure 6: New students on scholarships abroad (funded by MEHE)



Source: Qatar Ministry of Development Programme and Statistics

There were 830 new students on MEHE scholarships in 2017/18, 350 of whom went to the UK. This is a marked increase from the 583 new scholarship students in 2016/17, when the government placed greater emphasis on the return on its investment in scholarship funding.

As national wealth grows and educational attainment increases, interest in study abroad is likely to deepen. As higher education enrolment in Qatar is relatively low, particularly among males, and local provision is still developing, particularly at postgraduate level, the numbers heading abroad are likely to continue to increase.

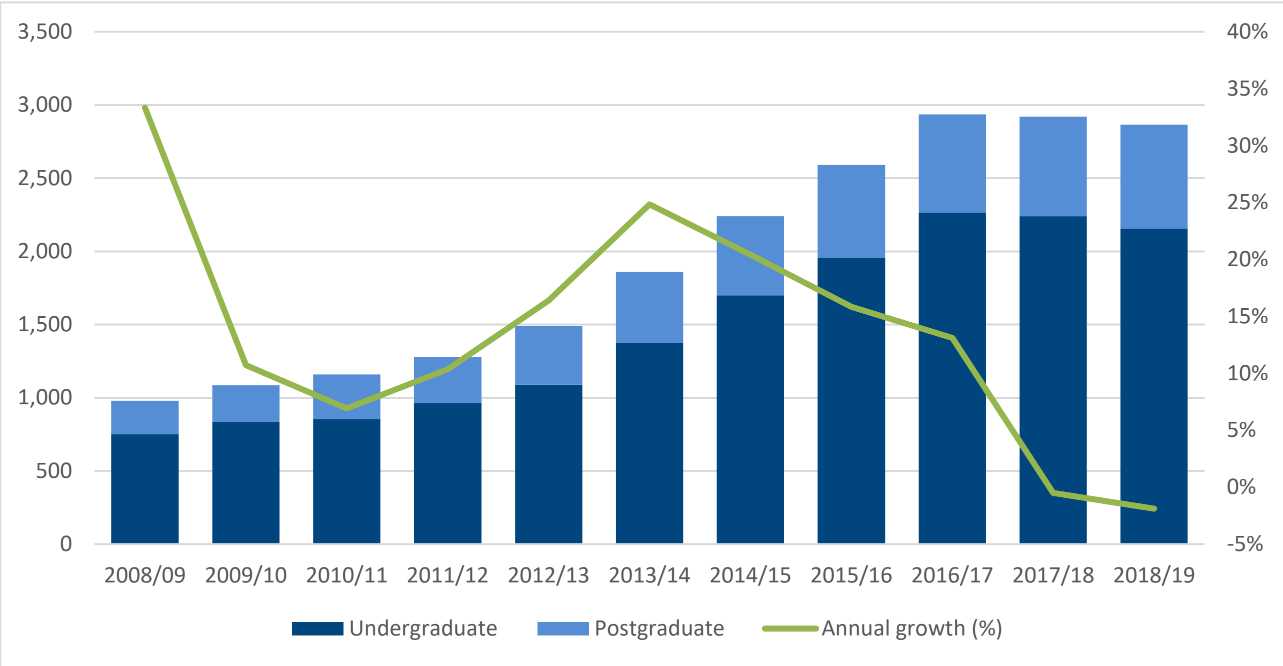
In addition to social media campaigns (in particular Instagram, Twitter and Snapchat), education fairs and exhibitions are key channels for recruiting students from Qatar. Student recruitment agents operate unofficially in Qatar, as they are not licensed by the government. Key influencers on the student decision making process include: parents of students, word of mouth from current students and recent graduates, and secondary school councillors who advise students on their study options.

UK recruitment

In 2018/19, 2,865 students from Qatar were enrolled in higher education institutions in the UK, a decrease of 2 per cent from the previous year. This was the second consecutive year of negative growth after more than a decade of positive growth. In 2017/18, 28.5 per cent of students from Qatar in the UK were sponsored students, highlighting the key role of scholarships in supporting outbound mobility.[53]

53 Views expressed by British Council Qatar office, January 2018.

Figure 7: UK student visas (tier 4 and equivalent)



Source: UK Home Office

Diverging data points between 2014 and 2016 can be explained by a change in UK study visa policy: prior to 2014, students from Qatar who were enrolled on foundation-level programmes in the UK required a second visa to progress to degree level study. Since 2014, one visa covers both levels of study, which led to a decrease in study visa issuance, even as the actual number of new students grew.

It is believed that the number of students from Qatar in the UK began to decrease for the 2017/18 academic year due to a new law concerning national service. The law increased national service duration from three months to one year and made it compulsory for every Qatari male aged between 18 and 35 to undertake a mandatory military service. While the law impacts recruitment of male Qatari students for academic year 2018/19 (who account for 56 per cent of Qatari domiciled students in the UK), it does not impact female Qatari students or non-Qatari (expatriate) students. The impact is expected to be short term and overall student flows from Qatar to the UK should return to growth from 2019/20.

As summarised in Table 1, Qatar is the fourth-largest recruitment market of the six GCC countries for the UK. Of the 2,860 students in the UK in the 2018/19 academic year, 75 per cent were pursuing an undergraduate degree, and 25 per cent were enrolled in postgraduate programmes.[54] This proportion has remained more or less static over the last decade. The majority of postgraduate enrolments were in taught master's programmes.[55]

54 Full UK bachelor's degree programmes (including combined bachelor's plus master's courses), undergraduate-level tertiary degrees such as Diplomas or Certificate, exchange students and those writing their thesis.

55 *HESA*, 2019.

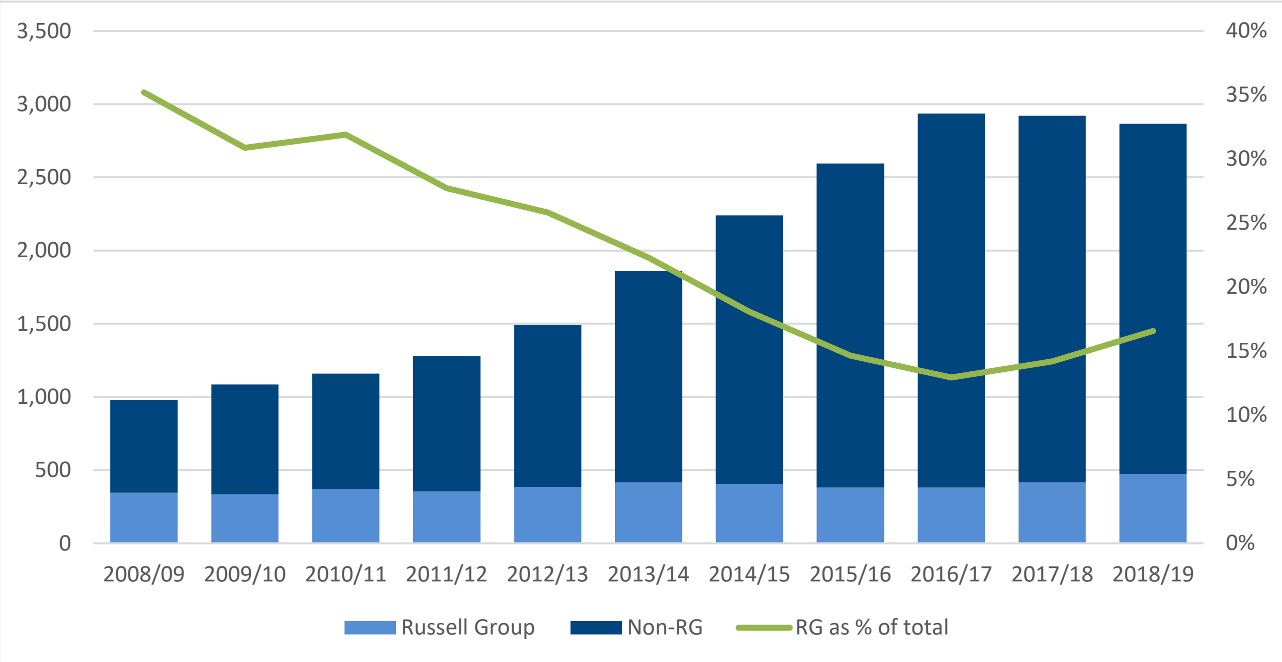
Table 1: GCC country enrolment in UK

GCC country	Students in UK, 2017/18	Growth on 2016/17
Saudi Arabia	9,185	-0.5%
UAE	4,705	11%
Kuwait	4,255	17.5%
Qatar	*2,860*	*-0.5%*
Oman	2,675	-5%
Bahrain	1,540	5.8%
GCC Total	**25,280**	4%

Source: HESA

As illustrated in Figure 7, growth has mainly occurred in non-Russell Group institutions, with the Russell Group's share of UK enrolments steadily decreasing between 2010 and 2016. This shift is related to a change in government policy, with a wider range of UK universities now included on the list of approved institutions for government scholarship recipients at the undergraduate level. The percentage of Russell Group enrolments has increased for two consecutive years to reach 17 per cent in 2018/19.

Figure 8: Qatar enrolments in the UK, Russell Group vs. the rest



Source: HESA

While expatriates account for 90 per cent of Qatar's population, they only account for about one quarter of students who travel from Qatar to the UK. This is in contrast to the UAE, for example, where about three quarters of the students travelling to the UK are expatriates. The difference is likely due to the higher proportion of blue-collar male expatriate workers in Qatar, who typically live and work in Qatar on a temporary basis without their families.

Interestingly, of the students enrolled in the branch campuses in Qatar, approximately 50 per cent are classified as 'non Qatari', highlighting the opportunity that TNE offers to reach a wider population.[56]

English is the primary foreign language in Qatar and is taught to children at the primary school level, though overall English competency in the country has generally been regarded as poor. While there are many English language training providers in Qatar, including the British Council, there remains a lack of full-time intensive courses, as provided at the post-secondary institutions.

Subject area

Figure 9: Change in UK enrolments according to subject

		Undergraduate			Postgraduate		
	Total new UK enrolments in 2018/19	New UK enrolments in 2018/19	Change from previous year	5-year trend	New UK enrolments in 2018/19	Change from previous year	5-year trend
Engineering & technology	905	830	-8.8%		75	-25.0%	
Business & administrative studies	885	565	-7.4%		320	30.6%	
Computer science	195	180	28.6%		15	-25.0%	
Social studies	165	115	-4.2%		50	25.0%	
Law	155	115	9.5%		40	-33.3%	
Biological sciences	85	65	0.0%		20	-20.0%	
Architecture, building & planning	75	55	22.2%		20	-20.0%	
Subjects allied to medicine	75	35	-22.2%		40	14.3%	
Mass communications and documentation	55	45	0.0%		10	-50.0%	
Medicine & dentistry	55	25	25.0%		30	-14.3%	
Creative arts & design	45	35	0.0%		10	0.0%	
Physical sciences	45	30	-25.0%		15	50.0%	
Languages	40	25	-28.6%		15	50.0%	
Education	40	5	*		35	-12.5%	
Combined	15	15	0.0%		0	0.0%	
Historical and philosophical studies	15	5	0.0%		10	100.0%	
Mathematical sciences	10	5	0.0%		5	*	
Agriculture & related subjects	0	0	0.0%		0	0.0%	
Veterinary science	0	0	0.0%		0	0.0%	

Source: HESA

For students from Qatar studying in the UK, engineering and technology is the most popular field of study, followed by business and administration, computer science, and social sciences.

Undergraduate enrolments in computer science, law, biological sciences, architecture, medicine and dentistry, and creative arts and design have steadily increased over the last five years. Business and administrative studies enrolments have declined for two consecutive years after four years of strong growth. Enrolments in engineering and technology declined by 8.8 per cent in 2018/19, the first year of decline after years of growth. Enrolments in languages have steadily declined over the last five years.

56 Review of Annual Reports of international branch campuses in Education City, 2018.

After four years of increasing postgraduate enrolments, engineering and technology enrolments dropped by 25 per cent in 2018/19. Business and administration enrolments rose by 30 per cent after two years of stagnant growth and was by far the most popular subject for postgraduates.

Recruitment channels

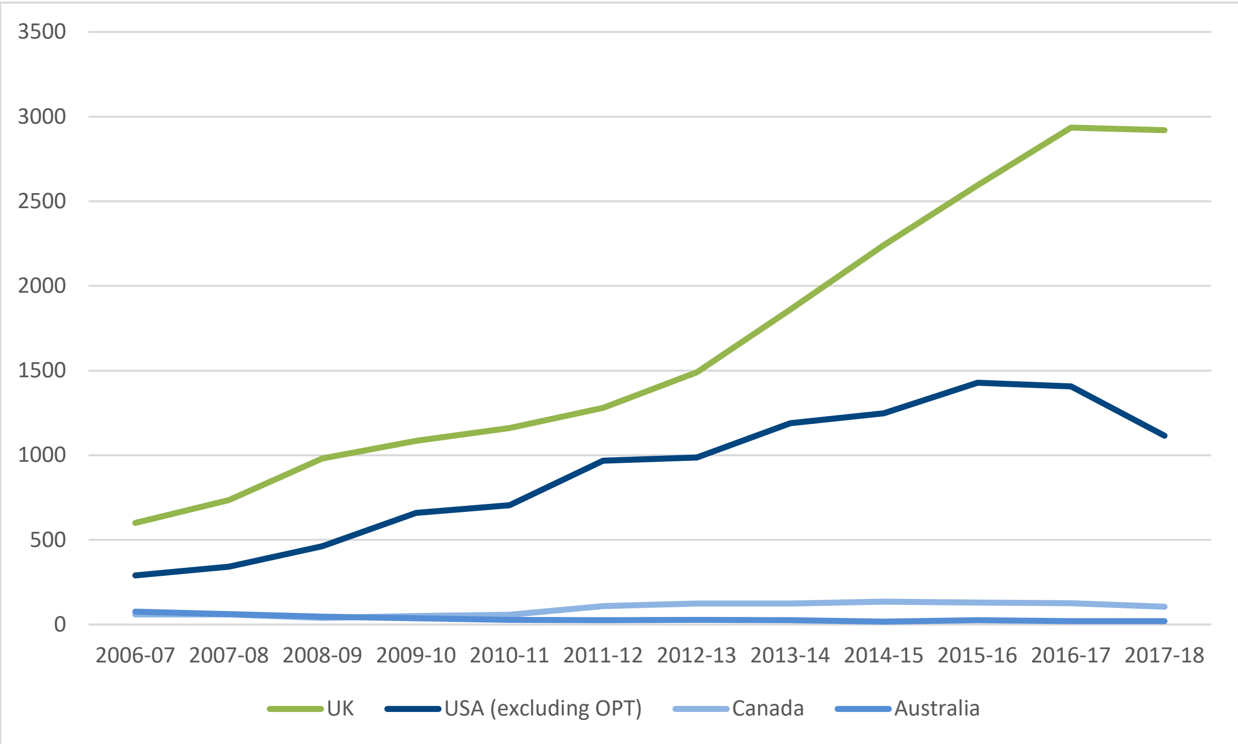
Qatar has a highly-developed digital media market and, along with many of its Gulf neighbours, has invested heavily in the digital age. The most important social media platforms to reach prospective international students are Instagram, Twitter and Snapchat. Facebook is popular among the expatriate population, though not with locals, who are the main target market for recruitment to the UK.[57]

In addition to social media, education fairs and exhibitions are key channels for recruiting students from Qatar. Student recruitment agents operate unofficially in Qatar as they are not licensed by the government (though some agents claim to be).

Key influencers on the student decision making process include: parents (who often attend education fairs), word of mouth from current students and recent graduates, and secondary school counsellors who advise students on their study options. According to a 2017 report from Universities UK, working with local schools is a major driver of student recruitment from GCC countries.

Competitor activity

Figure 10: Student mobility to the UK's main competitors



Source: HESA, UIS, Stat Canada, Austrade. Notes: US data excludes OPT; 2017/18 data for Canada is estimated based on 2017 study visa issuance, Australia 2017 data is compared against 2017/18 data for the other countries.

United States

The US is the second-most popular English-speaking destination for students from Qatar, after the UK. However, the US experienced a 20 per cent drop in students from Qatar in 2018.[58] While US policy

57 Views expressed by British Council Qatar office, January 2018.

58 Open Doors, *Institute of International Education*, 2017.

impacting travel on citizens from particular Muslim-majority countries may potentially affect student mobility, the presence of US branch campuses in Qatar should in theory support mobility. The US campuses are: Carnegie Mellon University; Georgetown University, Northwestern University, Texas A&M University, Virginia Commonwealth University, and Weill Cornell Medicine Qatar.

Australia

Very few tertiary level students from Qatar study in Australia (only 19 in 2017) and Australian universities are not active in the country.[59]

Canada

The number of Qatari students in Canada has held steady at just over 100 students since 2012/13. There are two Canadian HEIs in Qatar, the University of Calgary in Qatar. In 2019, College of the North Atlantic-Qatar signed an agreement with Dalhousie University in Nova Scotia, Canada, under which graduates of a two-year information technology or business diploma programmes at CNA-Q can study for an additional two years in Canada and obtain a bachelor's degree in the field.

Transnational Education

Qatar is relatively active as a Transnational Education (TNE) host country and has pursued an active policy of engagement with foreign universities, inviting several prestigious institutions to establish branches in Education City with significant financial backing provided by the Qatari government. The only UK campus in Education City, University College London, is due to close in 2020, as part of its revised internationalisation strategy. The number of in-person TNE learners declined to 675 students in 2017/18, down from 795 in 2016/17.

Most foreign university branches operate in partnership with the Qatar Foundation, but a second UK university, the University of Aberdeen, opened a branch campus in 2017 in a private venture undertaken with a local partner. Other branch campuses outside of Education City are the Canadian University of Calgary and the Dutch Stenden University.

Branch campuses have benefitted from the traditional reluctance of many families to send their daughters to study abroad. Also, the high proportion of expatriate residents are often forced to consider TNE because local citizens are given priority for admission to Qatar University. About 50 per cent of students enrolled in the branch campuses in Education City are 'non-Qatari'.[60]

US universities dominate in branch campuses, but the UK is more active in delivering programmes (foundation, BTEC and degree) in collaboration with local institutions, in particular with Hamad bin Khalifa University. However, the extent of collaboration is clearly limited by the small number of domestic institutions. NCUK has developed a partnership for foundation programmes delivered in Qatar to facilitate progression to study at 16 UK universities. Of 155 approved foreign institutions for distance learning, 84 are US-based, 47 in the UK, 20 in Australia and five in New Zealand. As with self-funded overseas students, advance approval is needed by prospective students from the equivalency office to ensure the distance learning qualifications will be recognised in Qatar.

At a press conference in August 2019, Undersecretary for Higher Education Affairs at the Ministry of Education and Higher Education Dr. Khalid Al Ali said that there are plans to open more universities in Qatar, and plans to attract an Asian university, a German university, and an Arab university are underway.[61]

59 Global Student Flow, *UNESCO Institute for Statistics*, 2017.

60 Review of Annual Reports of international branch campuses in Education City, 2018.

61 Over 323,251 students, 34,218 teachers rejoin schools across Qatar, The Peninsula, 26 August 2019.