

Market Intelligence Brief

KUWAIT

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INTERNATIONAL
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1. AT A GLANCE



Market background

- Kuwait is the second wealthiest of the six Gulf Cooperation Council countries. However, heavy dependence on oil revenues means that the economy is very vulnerable to fluctuations in the commodity's price. Kuwait's annual GDP growth was originally estimated to be 1.5 per cent in 2020, up from 0.7 per cent in 2019, but the oil price crisis and global Covid-19 pandemic will weigh heavily on growth. The IMF now anticipates a 1.1 per cent contraction.
- Under the policy blueprint Vision 2035: New Kuwait, the Kuwaiti government is working towards diversifying its economy away from oil and developing a better business environment to attract more foreign direct investment. The policy changes so far have caused Kuwait to move up on the World Bank's Ease of Doing Business report from 97th in 2019 to 83rd in 2020.
- Nearly 5 million people live in Kuwait, but more than two-thirds of the population are expatriate workers, predominantly from Asia, other Arab countries, and Africa. There is a significant youth bulge, with people under the age of 24 making up 40 per cent of the population. The population is expected to grow at a rate of 1.3 per cent annually.



Local education trends

- Education is free for all Kuwaiti nationals and is mandatory from ages six to 14. The pre-tertiary system consists of pre-primary, primary, intermediate, and secondary schools. Technical and vocational education and training is provided by the Public Authority for Applied Education and Training and is free for Kuwaiti students.
- Kuwait's growing youth population is placing pressure on the local education system and pushing many Kuwaiti families to consider private education, which typically sees higher enrolments of foreign students. The government is also partnering with private sector entities to help Kuwait meet demand for educational facilities.
- Vision 2035 prioritises education and calls for developing "creative human capital" to move the economy away from oil. Historically, Kuwait has not performed well in international education metrics, particularly in STEM subjects, which the government is seeking to remedy.
- There are four public higher education institutions and 15 private institutions. The only public university is Kuwait University, which is free for Kuwaiti nationals. The government provides about 2,000 scholarships annually for students to study abroad.



International education

- According to UNESCO, there were nearly 23,000 Kuwaiti tertiary students abroad in 2017. While the US is the most popular destination with more than 9,000 students in 2018/19, the number of Kuwaiti students going to the US has declined in recent years.
- The UK is the second most popular destination with 4,905 Kuwaiti tertiary students in 2018/19, a 15 per cent increase year-on-year. The number of Kuwaiti students studying at UK HEIs has increased more than 300 per cent in the last decade, and Kuwait is one of the ten fastest-growing markets for the UK. In 2018/19, the UK overtook the US as the most popular destination for scholarship students. In total, there are more than 3,600 Kuwaitis studying in the UK on scholarships.
- In 2018/19, there were 6,650 Kuwaiti students on UK TNE and distance courses, 5,955 of whom were enrolled in Open University courses. This is equivalent to 20 per cent of total enrolments at the Open University.

2. INTRODUCTION

Kuwait is a small, oil-rich emirate on the Arabian Peninsula. It borders Saudi Arabia and Iraq and shares a maritime border with Iran. Despite its small size, Kuwait is one of the wealthiest countries in the world when measured in terms of GDP per capita (PPP).

The population of Kuwait is estimated at 4.6 million people in 2020 and is expected to reach 5.1 million people by 2030. Expatriates account for 70 per cent of the population, the second highest of the GCC states after Qatar. People under the age of 24 account for 40 per cent of the total population, meaning a particularly high proportion are at student age.

The World Bank classifies Kuwait as a high-income country. Annual GDP growth in 2019 was 0.7 per cent, down from 1.2 per cent in 2018. It is the fifth-largest OPEC oil producer and its economy is primarily dependent on the export of oil. Currently, the economy is predicted to contract by 1.1 per cent in 2020 due to the oil price crisis and the ongoing Covid-19 pandemic.

The youth bulge presents a major opportunity for the government as it seeks to diversify away from oil. The National Vision 2035: New Kuwait policy blueprint, launched in 2017, emphasises education reform to improve provision and to help develop a creative human capital that can support the changing economy. Because of capacity and quality issues in public education, private education at the pre-tertiary level is becoming increasingly popular among Kuwaitis.

With its financial resources, high personal disposable incomes and growing student population, Kuwait is an important source of internationally mobile student. In 2017, nearly 23,000 Kuwaiti students at the tertiary level were studying internationally. The high degree of mobility is bolstered by the availability of scholarships for overseas study, including over 2,000 annual government scholarships and sponsorships from state-owned enterprises, banks, and investment companies. It is also driven by the high quality of overseas education compared with private universities in Kuwait.

The United States has historically been the most popular destination for internationally mobile students, and over 9,000 Kuwaiti students were studying in the US in 2018/19. However, interest in the US is waning and Kuwaiti enrolments fell by nearly 10 per cent compared to the previous year. The UK is the second most popular destination with 4,905 Kuwaiti enrolments in 2018/19, increasing 15 per cent from the previous year. Other preferred destinations are regional neighbours Jordan, the UAE, Saudi Arabia, and Bahrain.

The UK received more Kuwaiti students on government scholarships than the US in 2018/19 (979 in the UK and 959 in the US), making the UK the most popular destination for scholarship students for the first time. The overall number of government scholarships is declining, in part due to unfavourable economic conditions.

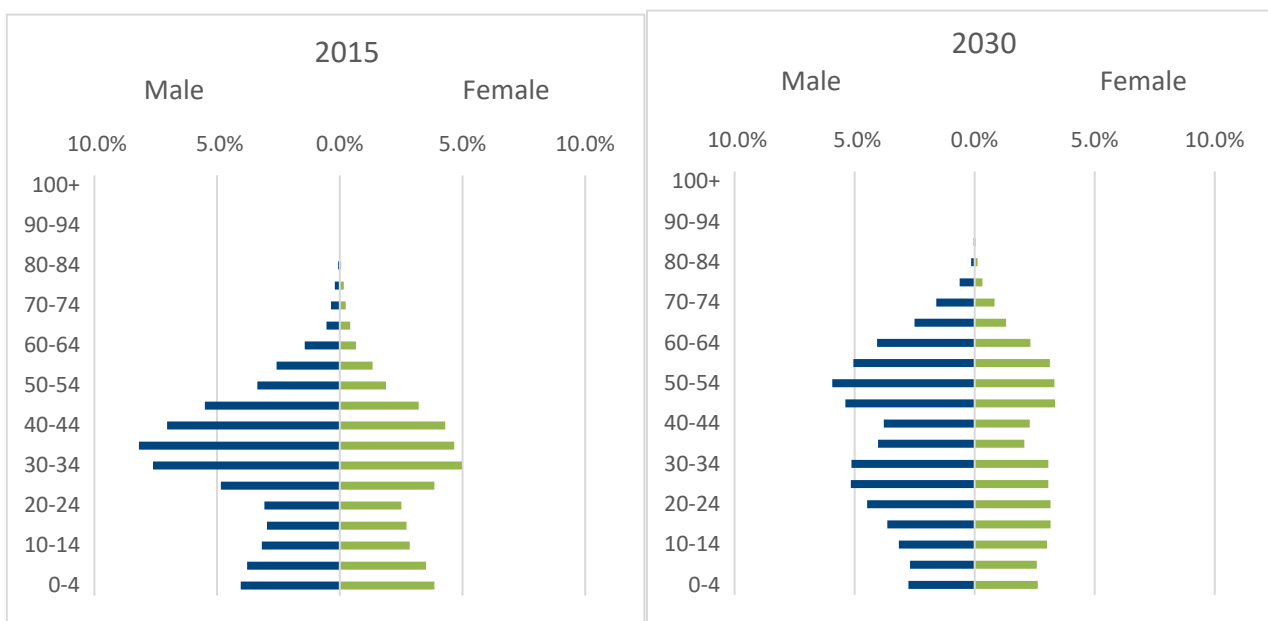
Kuwait is expected to remain a significant market for internationally mobile students for the coming years thanks to its growing youth population, overall wealth and the increasing need for an educated workforce to aid economic diversification.

3. DEMOGRAPHICS

Kuwait’s population is among the smallest of the Gulf Cooperation Council states at an estimated 4.6 million people, outnumbering only Qatar. The country’s population is growing and the United Nations projects that the population will grow to 5.1 million people by 2030.¹ Kuwait’s expatriate population accounts for the second-highest proportion in GCC states: at 70 per cent (3.2 million people), it is lower than only Qatar (87 per cent).²

The Kuwaiti population profile, shown in Figure 1, shows a significant bulge in the numbers of males between the ages of 25-49. While there is gender parity among Kuwaiti nationals, males account for 63 per cent of the non-Kuwaiti population, accounting for the apparent imbalance.³

Figure 1: Kuwait’s Population Pyramid, 2015 and 2030



Source: UN WPP

While Kuwait’s median age of 30 is slightly higher than the regional average, the country still has a large and growing youth population.⁴ People under the age of 24 make up 40 per cent of Kuwait’s population. As seen in Figure 2, the student-age population is expected to see significant growth in the coming decade. In 2019, those under the age of 14 accounted for one-quarter of the total population, and the 15-24 age group accounted for 15 per cent of the total population.⁵ Kuwait’s population is expected to grow at a rate of 1.3 per cent annually and the fertility rate was estimated to be 2.1 children per woman

¹ [Demography, Migration, and the Labour Market in Kuwait](#), *Gulf Labour Markets, Migration and Population Programme (GLMM)*, March 2019.

² [Demographic Changes in the GCC Countries: Reflection and Future](#), *Middle East Journal of Age and Ageing*, February 2018.

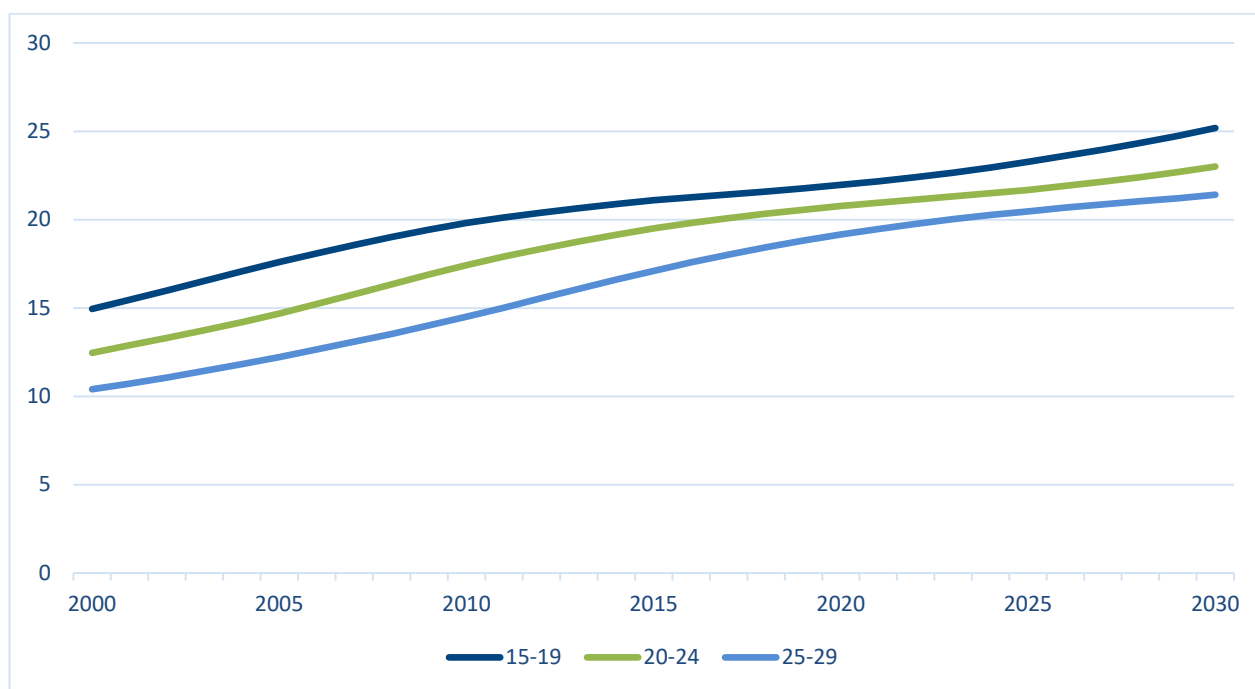
³ ["Kuwait: Population by Nationality \(Kuwaiti/Non-Kuwaiti\) and sex, 1990-2017"](#), *GLLM*, March 2018.

⁴ The average age across the GCC region is 27 years. [Demographic Changes in the GCC Countries: Reflection and Future](#), *Middle East Journal of Age and Ageing*, February 2018; [Kuwait](#), *CIA World Factbook*, accessed May 2020.

⁵ [Kuwait Population](#), *World Population Review*: Accessed June 2020.

in 2018, roughly equal to the replacement rate.⁶ Kuwait will increasingly become an important source of internationally mobile students.

Figure 2: School Age Population



Source: Euromonitor

The structure of the population has undergone rapid changes since the 1990s. Expatriate staff now are estimated to account for 84 per cent of the labour market and 96 per cent of the private sector workforce. While migrants from Asia and Africa are often concentrated in low-paid employment, expatriates from industrialised countries occupy management level positions in the public and private sectors. Kuwaitis are predominantly employed in high-paying public sector jobs.⁷ The expatriate population is predominantly male (70 per cent), 88 per cent of whom are working age (15-60 years).

About 58 per cent of the foreign nationals in Kuwait are from Asia (1.9 million people), particularly from India (1 million), Bangladesh (281,000) and the Philippines (214,000). Arab expatriates account for 39 per cent of foreign nationals. While there used to be over 92,000 people from African countries in Kuwait, in 2018 there were just 47,000.⁸

The entirety of Kuwait's population lives in urban areas. Much of the population resides in Kuwait City, the capital. Arabic is the official language of Kuwait and English is the most commonly used foreign language for business and commerce.

Islam is the official religion of Kuwait. Approximately 75 per cent of the total population are Muslim, of whom 70 per cent are Sunni and 30 per cent Shi'a. About 18 per cent of the population are Christian. Of the non-Kuwaiti population, about two-thirds are Muslim.⁹

⁶ [World Bank Indicators: Fertility rate](#), *The World Bank*, accessed 29 May 2020.

⁷ [Demography, Migration, and the Labour Market in Kuwait](#), GLMM, March 2019.

⁸ *Ibid.*

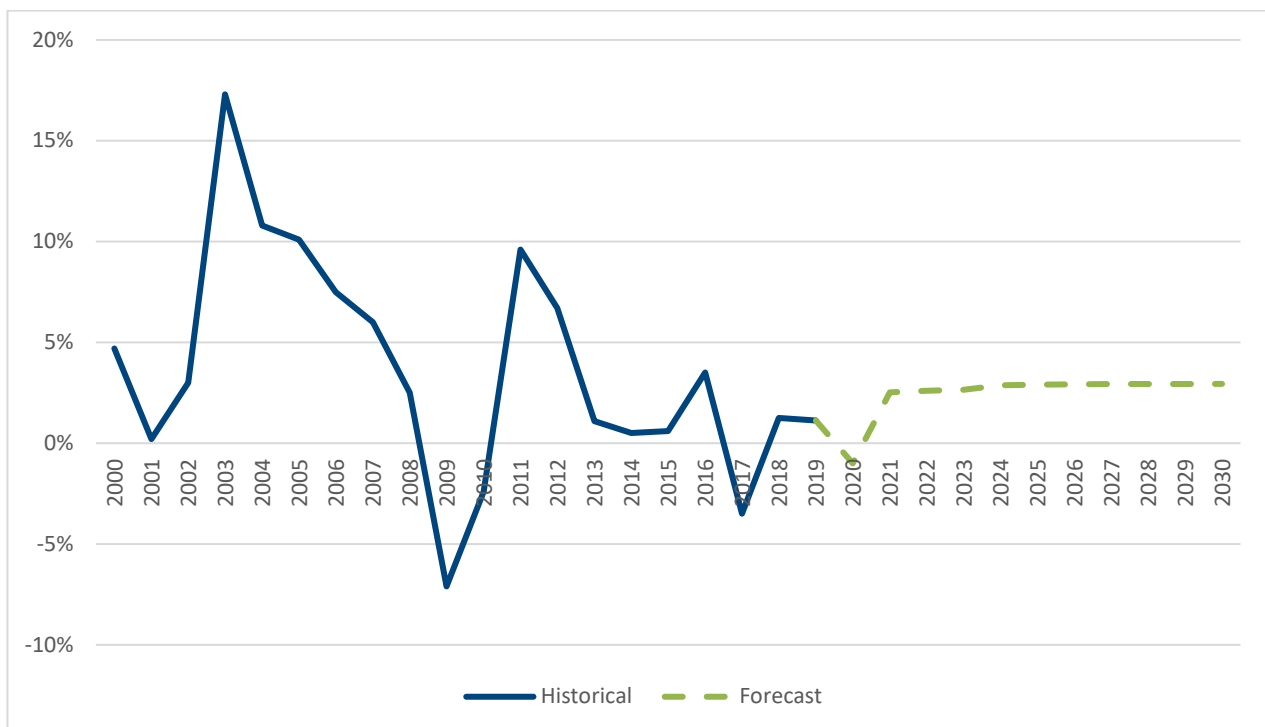
⁹ [Kuwait](#), *CIA World Factbook*, accessed May 2020.

4. ECONOMICS

Kuwait is the second wealthiest economy of the GCC countries and the third largest. Kuwait's annual GDP growth was estimated at 0.7 per cent in 2019, a slight decrease from the 1.2 per cent growth in 2018. It is classified by the World Bank as a high-income country.

The Covid-19 pandemic in early 2020 caused a near-global lockdown, setting off a global recession amid a global health crisis. Economic troubles were further compounded by a crash in global oil prices. Under these conditions, the IMF revised down its 2020 growth forecast for Kuwait from 1.5 per cent growth to a 1.1 per cent contraction.¹⁰ Experts warn that growth could contract further depending on the durations of the pandemic and the oil price crisis.

Figure 3: Real GDP growth and forecast



Source: Euromonitor

While the country has large fiscal and trade surpluses, its economy is nearly completely dependent on oil revenues and state subsidies. Kuwait is estimated to have approximately 7 per cent of the world's crude oil reserves and is the fifth-largest OPEC oil producer.

As such, Kuwait is one of the least-diversified economies in the Middle East and North Africa region. Oil revenues account for 72 per cent of government revenue, down from 80 per cent in 2014, and about 92 per cent of exports.¹¹ Manufacturing accounts for just 7.3 per cent of GDP.¹² Apart from a few large export-oriented petrochemical operations and oil refineries, the sector also includes smaller manufacturers that produce bricks, cement, and ammonia. Manufacturing employs 4 per cent of the

¹⁰ [Kuwait and the IMF](#), IMF, accessed 27 May 2020.

¹¹ [Vulnerability, resilience, and reform: The GCC and the oil price crisis 2014-2016](#), Columbia Center on Global Energy Policy, December 2016; [Kuwait: 2020 Article IV Consultation](#), IMF, 30 March 2020.

¹² [Country profile: Kuwait](#), Euromonitor, 18 May 2020.

workforce while agriculture employs 2.6 per cent of the workforce. Farming is constrained by water shortages and a lack of arable land, but there are opportunities in other agricultural sectors such as fishing in local waters and in the Indian Ocean.¹³

Because of its dependence on the export and production of oil, Kuwait is very vulnerable to fluctuations in the commodity's price. The collapse in oil prices between 2014 and 2017 turned Kuwait's budget surplus in 2014 to its first budget deficit in more than a decade in 2015. Kuwait will have its sixth consecutive budget shortfall in the 2020/2021 fiscal year, which was set to hit a record high even before the Covid-19 pandemic and oil price crisis. The deficit may increase to over 13.6 per cent of GDP in 2020, hampering the government's ability to tackle its oil dependence from a position of strength.¹⁴ The IMF believes that Kuwait must take steps to cut expenditure, phase out subsidies and introduce taxes on corporate income, luxury items, and personal income as well as promote private sector growth.¹⁵

Most industries in Kuwait are subsidised by the government and many workers are employed by government-run companies. Approximately 70 per cent of working Kuwaitis are employed by the government, whereas 95 per cent of private sector employees are non-Kuwaitis.¹⁶ According to the Kuwaiti government, the total unemployment rate in the 2016/17 fiscal year was 2.2 per cent: 1.7 per cent among non-Kuwaitis and 6.4 per cent among Kuwaiti nationals.¹⁷ The youth unemployment rate (ages 15-24) has steadily risen over the last decade, reaching a high of 15.8 per cent in 2019. This rate is much higher for women than for men at 30 per cent and 9 per cent, respectively.¹⁸

The strategy for diversifying the economy away from oil is laid out in the National Vision 2035: New Kuwait, which aims to transform Kuwait into a leading financial and trade hub. The development plan was launched in 2017 and sets goals to increase productivity and the development of non-oil economic sectors, improve standards of living, engage the private sector and develop infrastructure to enable a better business environment.¹⁹

A major part of this policy blueprint is attracting more foreign direct investment (FDI) and creating a more business-friendly environment. Historically, Kuwait has not been a major recipient of FDI. There are several sectors that remain off-limits to foreigners, such as extraction of crude oil and gas and manufacturing of fertilizers and other chemicals, and there are restrictions to the real estate sector that exclude privately-owned development projects. Kuwait has not been able to replicate the surge in FDI seen in 2011 and 2012 and its FDI inflows fall well below the GCC average.²⁰ However, the policy changes under Vision 2035 have so far created positive results. The country moved up 14 places in the World Bank's Ease of Doing Business rankings 2020 to 83rd thanks to improved, business-friendly policies.²¹

Kuwait receives support from the World Bank for programmes to enhance public sector policy reforms, promote non-oil business growth and job creation and boost critical infrastructure development. The Reimbursable Advisory Services (RAS) programme is one of the largest in the World Bank and it covers education, small and medium enterprises, and land management modernisation.²² These are all key sectors for reform in the 2035 policy vision.

¹³ [Country profile: Kuwait](#), *Euromonitor*, 18 May 2020.

¹⁴ [Kuwait's Economic Update - April 2020](#), *World Bank*, 16 April 2020.

¹⁵ [Kuwait : 2020 Article IV Consultation](#), *IMF*, 30 March 2020.

¹⁶ [Country profile: Kuwait](#), *Euromonitor*, 18 May 2020.

¹⁷ [Annual Statistical Abstract 2017/18](#), *Kuwait Central Statistical Bureau*, 2018.

¹⁸ [Unemployment, youth total \(% of total labor force ages 15-24\)](#), *World Bank Indicators*, accessed June 2020.

¹⁹ [Kuwait Vision 2035: "New Kuwait"](#), *Kuwait Ministry of Foreign Affairs*, accessed May 2020.

²⁰ [Economics in Focus](#), *National Bank of Kuwait Research Department*, 4 March 2020.

²¹ *Ibid.*; [Kuwait](#), *Doing Business 2020*, 24 October 2019.

²² [Kuwait Country Program](#), *The World Bank*, 25 January 2017.

In the World Economic Forum's Global Competitiveness Index 2019, Kuwait moved up eight places to reach 46th out of 141 countries, behind Israel, the UAE, Qatar, and Saudi Arabia. It came first in the macro-economic stability sub-section and ranked 12th for health.²³ Kuwait tied Uruguay to come 57th in the UN's Human Development Index, behind Oman (47), Qatar (41), Saudi Arabia (36), and the UAE (35).²⁴

The Kuwaiti Dinar (KWD) was pegged to the US dollar in 2003 until it was re-pegged to an undisclosed basket of currencies in 2007. When its exchange rate rose to KWD1 = US\$3.29 in 2019, it became the most valuable currency in the world. At the end of May 2020, the exchange rate had fallen slightly to 1KWD = US\$3.23. The annual inflation rate was 1.1 per cent in 2019, up from 0.6 per cent in 2018 but below the 3.5 per cent rate in 2016. It is estimated at 0.5 per cent in 2020.²⁵

²³ [The Global Competitiveness Report 2019](#), *World Economic Forum*, October 2019.

²⁴ [Country Profile: Kuwait](#), *UN Human Development Index*, 2019.

²⁵ [Kuwait and the IMF](#), *IMF*, 2020.

5. POLITICS & POLICYMAKING

The State of Kuwait is a constitutional monarchy led by Emir Sheikh Sabah Al-Ahmed Al-Sabah under a constitution that was approved in November 1962. Before then, it was a British protectorate for over six decades, ending in 1961. It has a semi-democratic system divided between an elected parliament called the National Assembly and officials appointed by the royal family. Appointments must be approved by the National Assembly. Many key positions are held by members of the ruling family.

The current Emir has ruled Kuwait since January 2006 after serving as foreign minister for a 40-year period (1963-2003) and then as prime minister (2003-2006). The Emir has absolute executive power and appoints the Prime Minister who acts as head of government. The National Assembly consists of 50 members elected by popular vote every four years and 15 ex-officio members appointed by the Emir. The next parliamentary elections are due in 2020.

The state religion is Sunni Islam. Legislation is based on Sharia law and the legal system draws from Sharia law for family and personal issues. In February 2020, the legislature voted unanimously in favour of a draft law that would introduce a Sharia board to regulate the country's banking sector.²⁶

Kuwait is regarded to have the most open political system in the Gulf Arab region. Government resignations are not uncommon but do not generally contribute to any overall instability. The current cabinet is the 36th in the history of Kuwait and was formed on 17 December 2019 after the previous cabinet resigned a month earlier. In February 2020, a cabinet reshuffle took place and the Emir swore in the new members.

The formation of political parties is not permitted, but the emergence of political blocs has been allowed to occur. Blocs are usually drawn on the lines of tribal interests, though religious and secular blocs have also developed.²⁷

The major blueprint for Kuwait's development is Vision 2035: New Kuwait, launched in 2017. The policy program aims to diversify Kuwait's economy beyond hydrocarbons, improve productivity of different socio-economic actors and reduce reliance on the public sector for the employment of nationals. This include labour market reforms, a goal of reducing the role of the government in implementing development projects from 90 to 30-40 per cent, education reform and the creation of a more favourable business environment.²⁸

²⁶ [Kuwait parliament approves bill to establish sharia board -KUNA](#), Reuters, 19 February 2020.

²⁷ [The political framework of Kuwait](#), Nordeatrade, June 2020.

²⁸ [Kuwait Vision 2035...is a promising strategy](#), The Arab Times, 15 November 2019.

5. EDUCATION

The country's long-term development plan laid out in Kuwait Vision 2035 prioritises education and the development of "creative human capital" as a fundamental pillar of the economy. This vision for a 'New Kuwait' gives strong emphasis to areas such as technology-based scientific education and research, teacher training, business education and entrepreneurial training. It also promotes skills upgrades for renewable energy and general development of 'highly-skilled labour with the potential for high productivity in the labour market' across all sectors. These are framed as catalysts for economic diversification, sustainable growth and social progress. The government is now boosting its substantial financial investment with policy reforms tailored to Kuwait's needs and values. The Minister of Finance emphasised the vision of achieving low dependence on oil and replacing it with human creativity and innovation, adding that more than \$100 billion will be invested by 2035.²⁹

The Ministry of Education (MoE) supervises the general education system in Kuwait at the pre-primary, primary and secondary school levels and works in conjunction with the National Centre for Educational Development (NCED). Tertiary education is overseen by the Ministry of Higher Education (MoHE), with accreditation and quality control the responsibility of National Bureau for Academic Accreditation and Education Quality Assurance (NBAQ).

In 2018, the literacy rate among those over the age of 15 was 97 per cent, up from 94 per cent in 2009, placing it among the highest in GCC countries when comparing World Bank statistics. The rate among those ages 15-24 was 99.99 per cent, according to government statistics.³⁰

However, education outcomes indicate persistent problems with education quality, particularly in STEM subjects. Kuwait's average mathematics score in the Trends in International Mathematics and Science Study (TIMSS) is lower than regional peers, as well as among countries with similar levels of income.³¹

Pre-tertiary education

Pre-tertiary education is managed by the Ministry of Education (MoE). The Kuwaiti pre-tertiary system consists of pre-primary, primary (grades one to five), intermediate (grades six to ten), and secondary (grades 11 and 12). Schooling is mandatory for all children ages six to 14. Pre-primary education is not compulsory but, like all pre-tertiary education in Kuwait, is free in state-funded schools. The government is developing a reform programme for the education system to raise the quality of the curriculum in the school system.³² The MoE works in conjunction with the National Centre for Education Development, which is responsible for the inspection, accreditation, international testing, and issues of reform.

In the public education realm, there are no mixed-gender schools, but the gender equality index for secondary schools in 2018/19 was 1.19, indicating that there are more females than males enrolled. However, the gender equality index for private primary schools is 0.59, indicating that more males than females are enrolled in private education. This index decreases to 0.43 in private secondary schools, indicating far more male than female enrolments in private schools.³³ According to the World Bank,

²⁹ "Kuwait spends \$60bn on 2035 Vision, another \$100bn to be invested", *Arabian Business*, 23 November 2018

³⁰ [Literacy rate, youth total \(% of people ages 15-24\)](#), *World Bank Indicators*, accessed June 2020; [Educational Statistics 2018/19](#), *Central Statistics Bureau*, accessed June 2020.

³¹ [TIMSS 2015](#), *IEA*, 2015.

³² [World Class Kuwait 2019: Interview with Kuwait's Minister of Higher Education](#), *The Business Year*, 2019.

³³ Statistics for literacy rate and gender equality are those provided by the Kuwait government about Kuwaiti students. Non-Kuwaiti students are listed separately. For non-Kuwaitis in the Kuwait school system, the literacy rate (15+) is 96 per cent, literacy rate 15-24 is 99 per cent; gender equality index for secondary public schools is 1.01, private schools is 0.88. [Educational Statistics 2018/19](#), *Central Statistics Bureau*, accessed June 2020.

Kuwait's gender index for primary and secondary school enrolments overall is 1.05, the highest among GCC countries.³⁴

The language of instruction in public schools and Arabic private schools is Arabic. Foreign private schools use English or the language of the affiliate country for teaching mathematics and science.³⁵ At the end of secondary school, students are awarded the General Secondary Education Certificate.

According to government statistics on state-funded education provision, in 2018/19 there were 200 schools providing pre-primary schooling with over 41,700 enrolments. There were 274 primary schools, split almost equally between girls' and boys' schools; 218 intermediate schools (111 girls', 107 boys'); and 144 secondary schools (77 girls', 67 boys'). Total enrolments in state funded schools (excluding kindergartens) was 400,000. There were 117 private kindergartens (113 mixed, three girls', one boys'), 148 private primary schools (107 mixed, 21 girls', 20 boys'), 150 private intermediate schools (96 mixed, 25 girls', 29 boys') and 119 private secondary schools (71 mixed, 22 girls', 26 boys'). Total enrolments in private pre-tertiary schools was 258,000.³⁶

The number of private schools has increased from 501 (including 12 special needs schools) in 2013/14 to 548 (including 14 special needs schools) in 2018/19, in part because education for children of non-Kuwaiti parents is not covered by the state.³⁷ This explains why enrolments in private schools are heavily skewed towards non-Kuwaiti students (73 per cent) and enrolments in state-sponsored schools are heavily skewed towards Kuwaiti students (86 per cent).³⁸ Overall enrolment in private schools has increased by 24 per cent since 2013.³⁹

The increasing school-age population means that demand for quality K-12 education is rising, resulting in higher enrolments in private schools and rising consumer spending on education. As shown in Figure 4 annual consumer spending on education has risen from KWD360.2 million (US\$1.2 billion) in 2013 to KWD458 million (US\$1.4 billion). Growth in the private school segment of general education is expected to continue in the coming years.⁴⁰

³⁴ [School enrolment, primary and secondary \(gross\), gender parity index](#), *World Bank Indicators*, accessed June 2020.

³⁵ [TIMSS 2015 Encyclopaedia: Kuwait](#), *TIMSS and PIRLS International Study Center*, accessed June 2020.

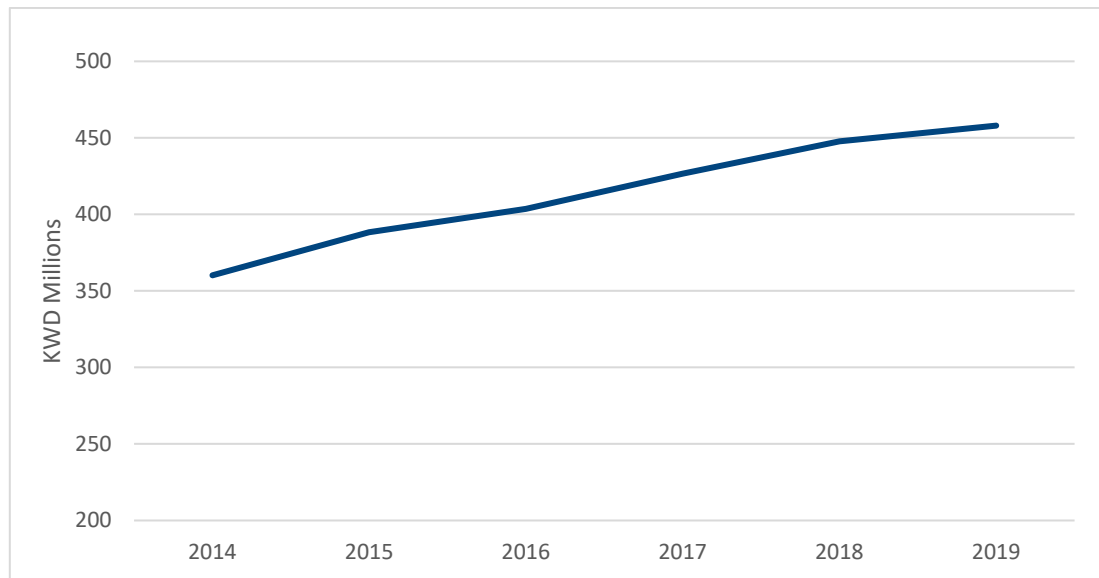
³⁶ [Educational Statistics 2018/19](#), *Central Statistics Bureau*, accessed June 2020.

³⁷ [Educational Statistics 2013/14](#), *Central Statistics Bureau*, accessed June 2020.

³⁸ [Educational Statistics 2018/19](#), *Central Statistics Bureau*, accessed June 2020.

³⁹ [Market overview: Kuwait](#), *British Council*, March 2020.

⁴⁰ [Government reforms to change Kuwait's education sector](#), *Oxford Business Group*, 2017.

Figure 4: Kuwait Consumer Expenditure on Education

Source: *Euromonitor International*

The government has partnered with the World Bank and the National Center for Education Development to implement programmes that modernise public schools with digitized textbooks, use of online courses and software, and new technologies to familiarise students with digital tools.⁴¹

The Kuwaiti government has investor stakes in private education companies, including the Kuwait Educational Fund, a public-private joint venture between KIPCO Asset Management Company, one of Kuwait's biggest financial groups, and the state-owned National Offset Company.⁴² In 2013, Kuwait passed a foreign investment law allowing 100 per cent foreign ownership of businesses, including in education.⁴³

There is high demand for technical and vocational education and training (TVET). The Public Authority for Applied Education and Training (PAAET) manages education and training programmes provided through four colleges that consist of specialisations and training institutes. The training institutes cover subjects such as business, nursing, energy (electricity and water), industry, construction and vocational training and there are two institutes for theatre arts and music. In 2017/18, there were a total of 9,684 Kuwaiti students (1,174 non-Kuwaiti students) enrolled in training institutes and tailored courses.⁴⁴ TVET programmes are free to Kuwaiti students.

PAAET aims to develop regulatory mechanisms, governance structures and legislation to improve the TVET system and institutions to resolve the mismatch between the skills and competences taught in TVET programmes and the needs of the labour market. This has resulted in an over-reliance on foreign workers in certain sectors.⁴⁵

Higher education

As with pre-tertiary education, tertiary education is free for Kuwaiti nationals attending public institutions. The sector is managed by the Ministry of Higher Education. Quality assurance is carried out

⁴¹ [Kuwait 2019: Education](#), *The Business Year*, 2019.

⁴² ["The Cost of Private Education"](#), *The Arab Gulf States Institute in Washington (AGSIW)*, 3 October 2017.

⁴³ [2019 Investment Climate Statements: Kuwait](#), *U.S. Department of State*.

⁴⁴ [Educational Statistics 2018/19](#), *Central Statistics Bureau*, accessed June 2020.

⁴⁵ [World TVET Database: Kuwait](#), *UNESCO*, 2018.

by the National Bureau for Academic Accreditation and Education Quality Assurance (NBAQ). Private universities must comply with regulations and accreditation criteria set by the Private Universities Council, the MoHE, and the NBAQ.

In 2019 the government allocated KWD554 million, 2 per cent of the national budget, directly to the Ministry of Higher Education.⁴⁶ Overall, there are 17 higher education institutions (HEI); two public and 15 private institutions. The public institutions are Kuwait University and the National Higher Institute for the Arts.

Kuwait University ranks in the 801-1,000 bracket of the Times Higher Education World University Rankings, which also lists enrolment of 36,551 full-time students, a student to staff ratio of 23:1 and a male-to-female ratio of 25:75.⁴⁷ Admission to Kuwait University depends primarily on grade averages from secondary school, but certain subjects such as medicine, dentistry, public health, engineering and petroleum, architecture, and business administration require aptitude tests.⁴⁸

The Kuwaiti government continues to place a strong emphasis on building quality infrastructure for boosting vocational and higher education institutions and promoting public private partnerships (PPP) to develop its tertiary facilities. A new complex for Kuwait University is being constructed at Sabah Al Salem University City and was completed in 2019 and can accommodate 40,000 students. It also has a state-of-the-art medical school with a 700-bed teaching hospital.

The most popular subjects among newly admitted undergraduate students at Kuwait University were arts (693 enrolments), engineering and petroleum (617), and education (555). Overall, the most popular subjects were arts, education, and engineering and petroleum.⁴⁹ For postgraduates, the most popular subjects were Sharia and Islamic studies, social sciences and education.

The gross enrolment ratio for tertiary education was just 54 per cent in 2018. While this is the second highest among GCC countries (lower than only Saudi Arabia, which has a GER of 68 per cent), this is well below the high-income country average of 75 per cent. The government aims to increase this ratio with education reform programmes.⁵⁰

Kuwait is not prolific in research. In the Nature Index 2020, Kuwaiti researchers and institutions were recorded to have published just 13 research outputs between 1 April 2019 and 31 March 2020.⁵¹ In the Global Innovation Index 2019, Kuwait ranked 60th overall, level with 2018. Though this is the second-highest ranking for GCC countries in the index (behind the United Arab Emirates, which ranked 36th), Kuwait comes second to last in research and development. In this category, it ranked 87th with poor scores for gross expenditure on R&D and for global R&D companies.⁵² Of the GCC states, only Bahrain came lower in this category.

Under the UK Science and Innovation Network – Kuwait, the two countries have promoted bilateral research and education. The priority areas for collaboration with the UK are petroleum and energy, water, and environment and life sciences. As a result, there have been agreements signed between institutions in both countries and a number of collaborative multi-year projects.⁵³ According to the Nature Index, the UK ranked fourth in Kuwait's top 10 research collaborators, behind the US, Saudi Arabia, and Australia.

⁴⁶ [Budget 2019/20](#), Kuwait Ministry of Finance, accessed June 2020.

⁴⁷ [Kuwait University](#), *THE*, accessed June 2020.

⁴⁸ [Required Academic Aptitude Tests and Weights for KU Colleges 2019/20](#), Kuwait University, 2019.

⁴⁹ [Educational Statistics 2018/19](#), Central Statistics Bureau, accessed June 2020.

⁵⁰ [School enrollment, tertiary \(% gross\)](#), World Bank, accessed June 2020.

⁵¹ [Country outputs: Kuwait](#), *The Nature Index 2020*, accessed June 2020. The Nature Index tracks research in the natural sciences.

⁵² [Global Innovation Index 2019](#), *Global Innovation Index*, accessed June 2020.

⁵³ [UK Science & Innovation Network Country Snapshot: Kuwait](#), 19 December 2018.

Key policies related to education

In 2011, the Kuwait government launched the Integrated Education Reform Programme (IERP), set to run from 2011-2019. This reform programme focuses on the student, emphasised applied knowledge, and will cater to different learning ability. It will also introduce competency-based learning, which will include new textbooks and assessments to gauge progress at the national, school, and student levels.⁵⁴ The IERP aims to foster improved curriculum development, effective teaching, school effectiveness, system accountability and decision-making. Improved performance will also be indicative of higher quality staffing, which Kuwait needs to rapidly scale up in response to pressures to reduce the numbers of foreigners working in Kuwait.⁵⁵

In 2015, the Ministry of Education (MoE) and the National Centre for Education Development (NCED) partnered with the World Bank to launch a five-year technical cooperation agreement to drive forward educational reform in conjunction with the IERP. Other challenges to be addressed include a shortage of skilled teachers, low tertiary enrolment rates, and the standard of education. This new initiative falls under the umbrella of the Vision 2035: New Kuwait policy blueprint.⁵⁶

Since 2014, the government has sought to actively engage the private sector in development, primarily through offering investor-friendly policies and public-private partnerships. Under the Kuwait Schools Development Programme, the Ministry of Education and the Partnerships Technical Bureau have sought to involve the private sector to help Kuwait meet increasing demand for educational facilities. The MoE is currently pursuing the development of five kindergartens, three elementary schools and one middle school, as well as a residential building for school faculty and an Olympic-size swimming pool across Kuwait.⁵⁷ Currently, the government is building nine schools under public-private partnerships. An Education City, or the Sabah al Salem University City, is set to have world-class facilities with digital teaching and learning resources.⁵⁸

The World Bank's RAS portfolio in Kuwait also covers education, which has manifested in a US\$37 million multi-year strategic partnership between the Bank and the Ministry of Education to support education reforms and improve the quality of teaching and learning.⁵⁹

In 2011, the MoE launched the e-education project which aims to increase the use of technology in education. Under this programme, science and maths curricula after fifth grade require e-books, and high school classrooms have received interactive smartboards and computer stations.⁶⁰

International student recruitment

Overall inbound trend

UNESCO does not have any data for tertiary students traveling to Kuwait for study. According to statistics from the Kuwait government, in the first semester of the 2018/19 academic year there were a total of 4,792 non-Kuwaiti students enrolled in Kuwait University. The most popular subject was education, followed by arts. In the first semester of 2018/19 there were 220 non-Kuwaiti students

⁵⁴ At the time of writing (June 2020), a new reform programme for after the 2011-2019 period had not been announced. It is expected to be announced after the next National Assembly elections, the date for which had not yet been set at the time of writing. [Expectations and Aspirations: A New Framework for Education in the Middle East and North Africa](#), World Bank, 15 October 2019.

⁵⁵ [Kuwait ministry finalizing list of expat workers to be terminated by end of June 2019](#), ZAWYA, December 2018.

⁵⁶ [Kuwait's development plan targets improving education at every level](#), Oxford Business Group, 2017; [Integrated Education Reform Program in Kuwait](#), World Bank, 20 May 2019.

⁵⁷ [Kuwait Schools Development Program](#), Kuwait Authority for Partnership Projects, accessed June 2020.

⁵⁸ [GCC Education Industry](#), Alpen Capital, 13 November 2018; [Kuwait's development plan targets improving education at every level](#), Oxford Business Group, 2017.

⁵⁹ [Kuwait Country Program](#), The World Bank, 25 January 2017.

⁶⁰ [Kuwait's development plan targets improving education at every level](#), Oxford Business Group, 2017.

enrolled in postgraduate programmes at Kuwait University. However, the statistics available do not provide information on where students are coming from, except for those from GCC countries.

Among GCC countries, Saudi Arabia by far sends the most students to study at Kuwait University, sending 1,548 students in 2018 (of whom 1,057 were female). Oman is second, sending 127, followed by Bahrain (95), Qatar (8), and the UAE (4). It is noteworthy that of the 1,782 GCC nationals at Kuwait University, 1,231 are female.⁶¹

Overall outbound trend

According to UNESCO, in 2017 there were a total of 22,891 Kuwaiti tertiary students abroad. The US is by some way the most popular destination with just over 9,000 students, a decrease of nearly 10 per cent from 2017/18 numbers. The UK is the second most popular destination with 4,905 tertiary students in 2018/19, a growth of 15 per cent from the previous year. Other popular destinations are regional neighbours Jordan, the UAE, Saudi Arabia, and Bahrain.⁶²

The Ministry of Higher Education recognises certain overseas universities, which are listed by subject area and degree programme. If the university or programme is not included, then the degree awarded is not recognised in Kuwait. In February 2020, the ministry released an updated list of approved UK universities and programmes.

The Kuwaiti government is encouraging its nationals to study abroad and offers more than 2,000 scholarships annually for students to study specialised areas and particularly at the postgraduate level. The scholarships are provided by the Ministry of Higher Education, the Public Authority for Applied Education and Training, the Public Authority for the Disabled, Kuwait University (postgraduate only), the Civil Service Commission and the Kuwait Institute for Scientific Research. State-owned companies, banks, and investment companies also sponsor employees.⁶³ There are also scholarship exchange programmes with other Arab countries in the region (such as Jordan, Qatar, and Bahrain), where foreign students from sending countries receive scholarships from the government of the hosting country.

In 2018/19, 2,354 new students were studying abroad on scholarships, the lowest in the last five years. Of these, 979 were in the UK, compared with 1,094 in 2017/18 and 1,150 in 2016/17. Among scholarship students, the UK is the most popular destination for study, followed closely by the US, which received 959 scholarship students in 2018/19. However, this is more than 500 students lower than the number of scholarship students in the US in 2017/18 (1,586).⁶⁴ In total, there are more than 3,600 Kuwaitis studying in the UK on scholarships.

UK recruitment

The UK has steadily grown as a destination for Kuwaiti tertiary students, increasing by more than 300 per cent in the last decade. There were just 1,615 Kuwaiti students in the UK in 2008/09, while 2018/19 saw a record 4,905 Kuwaiti students, a 15 per cent growth year-on-year. This marked the sixth consecutive year of double-digit growth, placing Kuwait among the ten largest markets in growth rate for UK study visas.⁶⁵

⁶¹ [Educational Statistics 2018/2019](#), Kuwait Central Statistical Bureau, 2019.

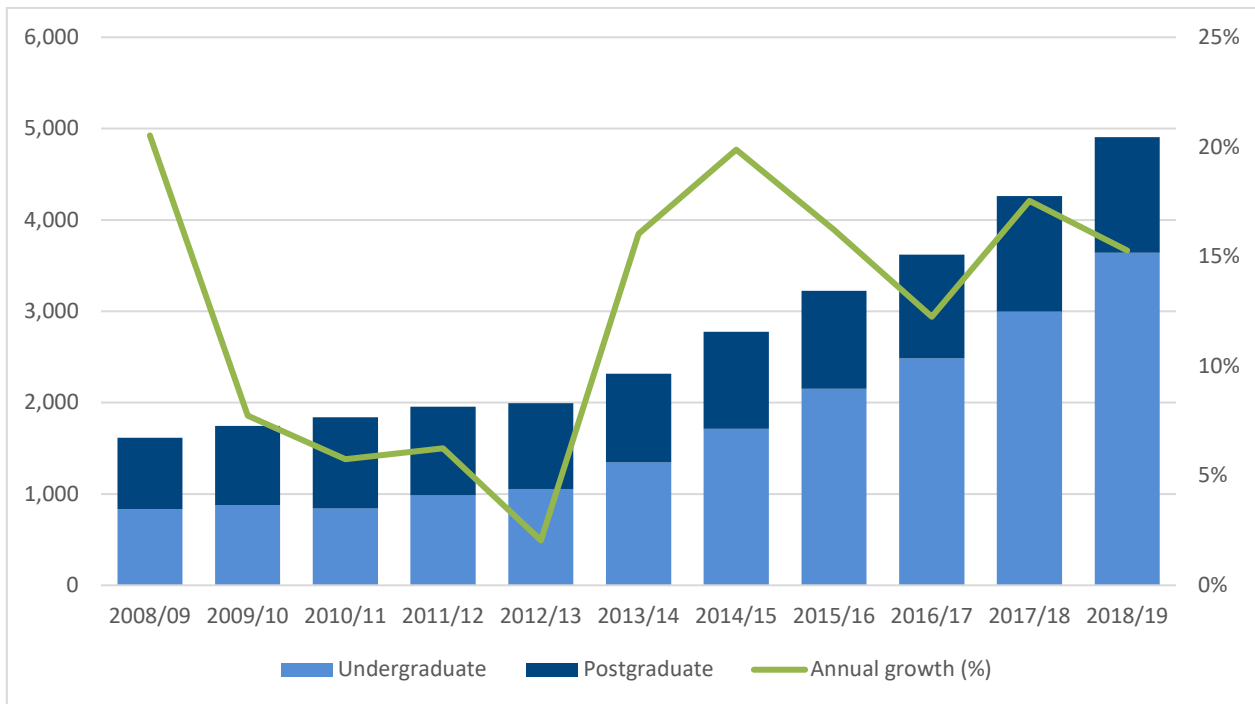
⁶² [Outbound internationally mobile students](#), UNESCO UIS.

⁶³ [Market overview: Kuwait](#), British Council, March 2020.

⁶⁴ [Educational Statistics 2018/2019](#), Kuwait Central Statistical Bureau, 2019.

⁶⁵ [Market overview: Kuwait](#), British Council, March 2020.

Figure 5: Kuwaiti Tertiary Students Studying in UK



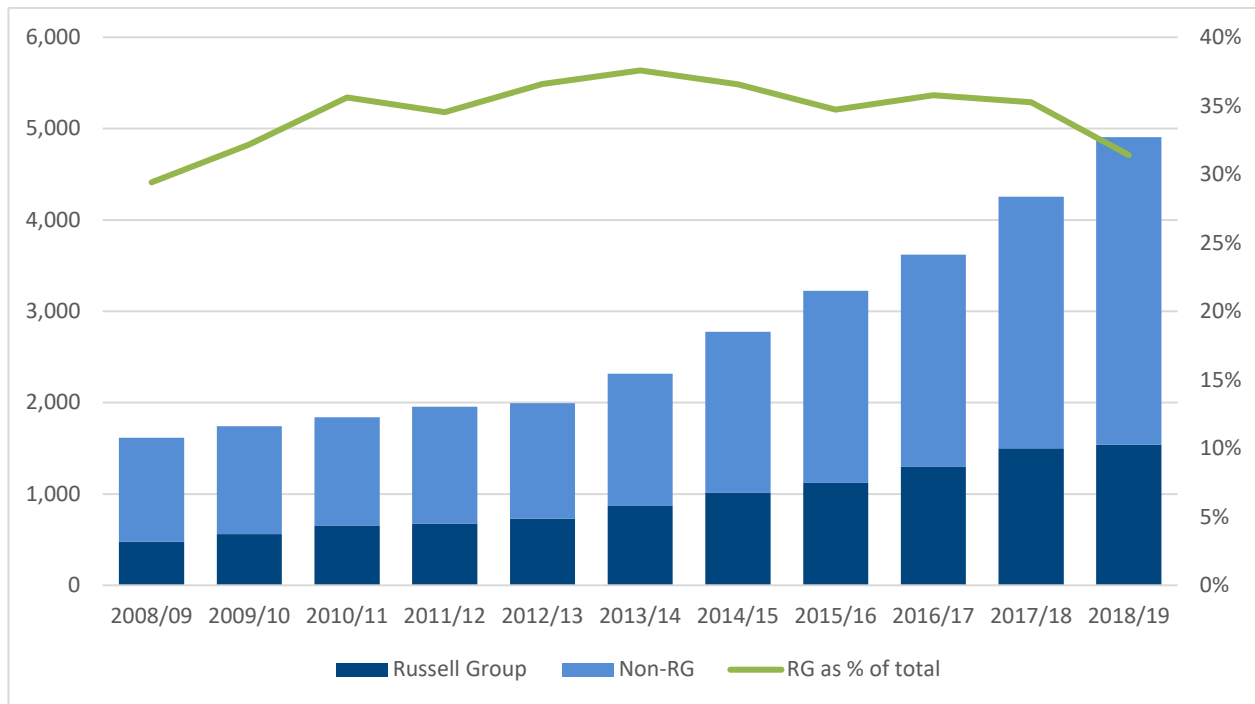
Source: HESA

There has been a significant shift in the level at which Kuwaiti students are studying in the UK. Before 2013/14 there was a roughly even split between those studying at undergraduate and postgraduate levels, but from 2014/15 undergraduates have accounted for more than 60 per cent of the total. In 2018/19, this proportion grew further: undergraduates made up 74 per cent of Kuwaiti students at UK HEIs. The number of postgraduates in 2018/19 was equal to the previous year at just 1,265, compared with 3,640 undergraduates.

Overall, male enrolments outnumber female enrolments, but particularly in undergraduate enrolments. In 2018/19, there were 2,460 male Kuwaitis in undergraduate programmes and 1,180 females, compared with 675 males and 160 females in 2008/09. For postgraduate enrolments, however, women outnumbered men for the first time in 2018/19, with 635 women and 625 men. This is an increase from 295 women and 480 men in postgraduate programmes in 2008/09.⁶⁶

⁶⁶ HESA data, accessed June 2020.

Figure 6: Russell Group Enrolments



Source: HESA

The proportion of Kuwaiti students studying at Russell Group institutions rose from 29 per cent of the total in 2008/09 to a peak of 38 per cent in 2013/14. However, since then this proportion declined to just 31 per cent in 2018/19.

Subject areas

Figure 7: New UK enrolments according to subject area, YoY change

	Total new UK enrolments in 2018/19	Undergraduate			Postgraduate		
		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	2005	1785	17.8%		220	4.8%	
Business & administrative studies	615	380	24.6%		235	6.8%	
Medicine & dentistry	480	315	26.0%		165	-8.3%	
Subjects allied to medicine	350	205	36.7%		145	0.0%	
Law	250	180	2.9%		70	40.0%	
Social studies	240	185	27.6%		55	0.0%	
Languages	230	170	70.0%		60	-14.3%	
Biological sciences	205	120	50.0%		85	0.0%	
Physical sciences	100	65	0.0%		35	-12.5%	
Mass communications and documentation	100	80	45.5%		20	0.0%	
Computer science	85	45	50.0%		40	14.3%	
Architecture, building & planning	75	35	16.7%		40	0.0%	
Creative arts & design	50	35	16.7%		15	-40.0%	
Education	50	0	-100.0%		50	-9.1%	
Mathematical sciences	30	20	0.0%		10	0.0%	
Historical and philosophical studies	15	5	*		10	-33.3%	
Agriculture & related subjects	10	0	0.0%		10	0.0%	
Combined	5	5	-50.0%		0	0.0%	
Veterinary science	0	0	0.0%		0	0.0%	

Source: HESA

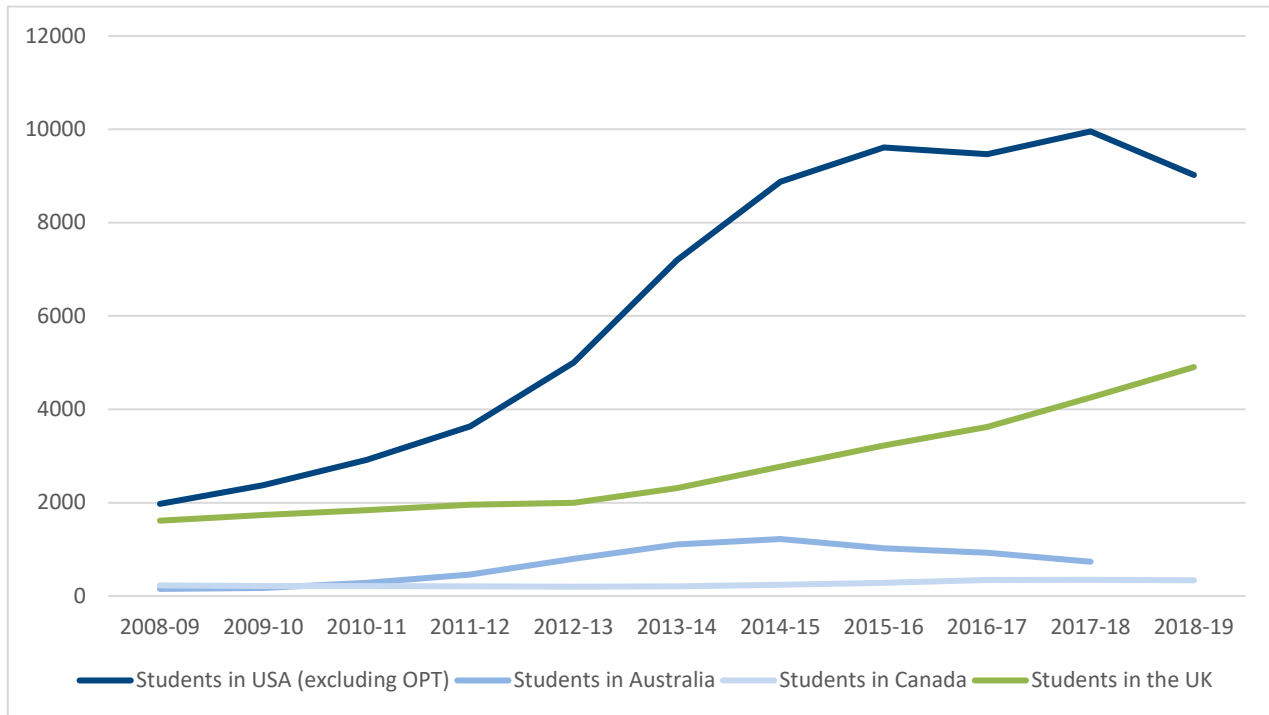
Due to the consistent overall increase in undergraduate enrolments, almost all subject areas have seen increases in new students. The most popular subject area for undergraduates is, by far, engineering and technology, with nearly 1,800 new enrolments in 2018/19. The growth in engineering and technology (17.8 per cent growth year-on-year), medicine (26 per cent) and subjects allied to medicine (36.7 per cent) likely reflect the Kuwaiti government’s efforts to promote certain fields as part of Vision 2035, which has included scholarships for students in medical fields, technology, engineering, and technical disciplines.⁶⁷ After engineering and technology, the most popular subject area for new undergraduates was business and administrative studies with 380 enrolments, an increase of 25 per cent from the previous year.

Growth in postgraduate enrolments has slowed and the total postgraduate enrolments in 2018/19 was level with 2017/18 at 1,265. Despite this, new enrolments in engineering and technology and business and administrative studies grew by 5 per cent and 7 per cent, respectively. Enrolments in law increased by 40 per cent.

⁶⁷ [World Class Kuwait 2019: Interview with Kuwait's Minister of Higher Education](#), *The Business Year*, 2019.

Competitor activity

Figure 8: Kuwaiti Students Studying in Competitors



Source: IIE, British Council estimates based on Canadian statistics, Austrade, HESA

In 2018/19 there were 9,021 Kuwaiti students studying in the US, a 9 per cent contraction from the previous year. Anti-Muslim sentiment, such as the “Muslim ban” of February 2019, may be a factor in the fall off in US enrolments. According to IIE, there was a 5 per cent drop in Kuwaiti students in undergraduate programs, a 4.8 per cent drop in students in graduate programmes, a 42 per cent drop in students on non-degree programmes and a 26 per cent drop in students in Optional Practical Training (OPT).⁶⁸

The number of Kuwaiti students traveling to Australia has declined significantly since 2015. The anti-Muslim rhetoric of successive Australian governments and a more hostile immigration policy, perceived as targeting Muslims and Arabs, are discouraging potential Pakistani applicants to Australian universities.

Canada has not typically been a major destination for Kuwaiti students, though it is slowly growing in popularity. There were just 336 Kuwaiti students at Canadian tertiary institutions in 2018/19, a 4 per cent decline year-on-year. Before the 2018/19 academic year, there had been five consecutive years of growth.

Transnational education

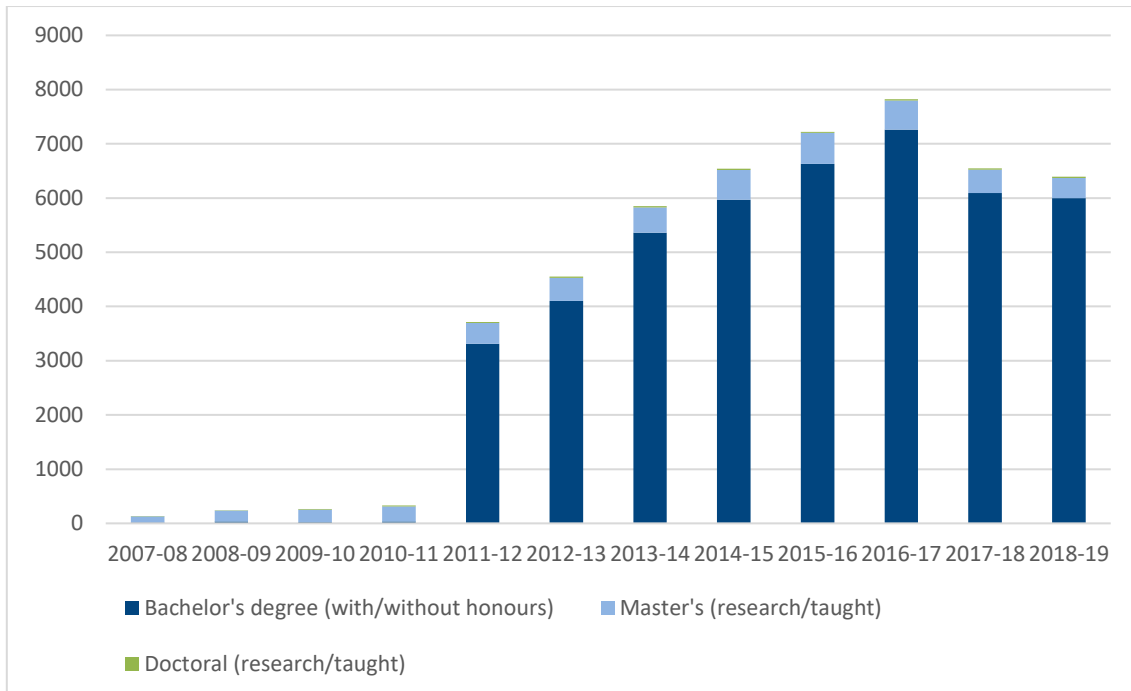
According to the latest HESA data, there were 6,650 Kuwaiti students on UK TNE and distance programmes in 2018/19, compared with 6,845 in 2017/18 and 8,150 in 2016/17.⁶⁹ Of these, 6,240 were on bachelor’s degree with honours programmes, 375 were on taught masters programmes, and 25

⁶⁸ [Number of Enrolled International Students Drops](#), *Inside Higher Ed*, 18 November 2019.

⁶⁹ Including Oxford Brookes University. Total enrolments excluding Oxford Brookes were 6,400 in 2018/19; 6,550 in 2017/18; and 7,830 in 2016/17. See Figure 9 for more data.

were on research doctoral programmes. The vast majority (5,955) of these students were enrolled at the Open University, accounting for 20 per cent of the university’s total enrolments in 2018/19. The Open University has a validation partnership with the Arab Open University (AOU). This allows AOU to offer programmes that lead to Open University-validated awards, which is regarded to be the same as a direct award from the Open University. The partnership agreement began in 2002 and is renewed every five years, most recently for the 2017-2022 period.⁷⁰

Figure 9: Kuwaiti Students in UK & Partner TNE Programmes



Source: HESA

Excluding the three main UK TNE providers of Oxford Brookes University, the Open University, and the University of London, the Middle East region hosted 11.4 per cent of UK TNE degree students in 2017/18, 1.3 per cent of whom were in Kuwait. The country ranked seventh in the top 10 host countries in the Middle East with 490 students. The vast majority of Kuwaiti students in UK TNE programmes (excluding the three main providers) are in postgraduate programmes.⁷¹

TNE and distance learning are growing sectors for private higher education provision in Kuwait. Currently, the only branch campuses in Kuwait are the Box Hill Institute, an Australian HEI, and the Kuwait Maastricht Business School (KMBS), a Dutch HEI.

The University of Massachusetts Lowell announced that it would build a satellite campus in Kuwait in conjunction with Raytheon Corp in 2014. The campus would offer degrees from the Massachusetts university and from the Gulf University for Science and Technology in fields including engineering, business, education, and science. In 2016, the plan was announced to be delayed for at least one year.⁷²

⁷⁰ [AOU and OU-UK Partnership](#), Arab Open University, accessed June 2020; [Arab Open University](#), Epicos.com, 24 August 2018.

⁷¹ [The Scale of UK TNE 2017/18](#), Universities UK, 6 November 2019. To analyse TNE trends, UUKi excludes the three main TNE providers because these three providers make up over half of the data. Relatively small variations in one of them can have an impact on the understanding of the performance and spread of TNE more generally amongst UK universities.

⁷² [UMass Lowell campus in Kuwait delayed at least a year](#), Lowell Sun, 30 March 2016.

In 2016, Kuwait signed a contract to launch a Kuwait branch of the Technical University of Munich (TUM).⁷³ The branch campus is being developed with Kuwaiti investor Malakiya and will offer bachelor, master, and Ph.D. programmes in engineering, management, and ICT for about 6,600 students.⁷⁴

⁷³ [MoE attends signing of contract to found TUM Kuwait branch](#), *Kuwait News Agency*, 20 December 2016.

⁷⁴ [TUM International Kuwait](#), *TUM International*, accessed June 2020.