

Research

Market Intelligence Brief

United Arab Emirates

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1 Executive Summary

The United Arab Emirates (UAE) is a federation of seven emirates located on the Arabian Peninsula and in GDP per capita terms is amongst the richest countries in the world. Much of the country's wealth has been derived from its position as one of the world's leading crude oil producers. However, over recent decades the UAE government has prioritised economic diversification strategies in order to reduce its dependence on oil export revenues. At present, 30 per cent of the country's GDP is contributed by its oil and gas output, down considerably from around 44 per cent in 2000, making the UAE the most diversified economy in the Gulf Cooperation Council (GCC). Contributing to the country's successful economic diversification have been its thriving service-based sectors including retail, financial services, and in particular, tourism, with Dubai having developed into a leading destination for tourists from all over the world.

The population of the UAE has more than tripled over the last two decades and currently stands at around 10m. Much of the population growth has been driven by the influx of migrant workers, particularly from South Asian countries including India, Bangladesh and Pakistan. At present, around 85 per cent of the UAE population are expats, with workers' remittances sent from UAE estimated to have reached US\$43bn in 2020, making it the world's second largest source of remittances after the US, and the largest source of remittances for Asian countries. The large expat population is therefore the primary driver of demographic trends in the UAE and has contributed to the country's unconventional population structure. For example, there are more than twice as many males within the UAE population compared to females, with significant clustering around the prime working-age bands, with almost half of the male population aged 25-39. Looking ahead, after very strong growth in the mid-2000s, population growth in the UAE has slowed significantly over recent years. This trend is expected to continue over the next decade, with the population projected to decline from the mid-2030s.

In line with the fast-paced growth of its population over recent decades, the UAE's domestic education system has expanded significantly and is one of the most developed education systems in the Middle East and North Africa region, catering for a diverse resident population. The education system within the UAE is highly privatised, with private schools accounting for almost two-thirds of schools in the country. The same is true in the higher education sector, with only a handful of the country's higher education institutions being public. Demand for private education is particularly high within the UAE due to the majority expat population, which has historically shown a strong preference for international style education.

According to estimates from UNESCO, 13,480 students from the UAE travelled abroad to study at the higher education level in 2019. This number has grown consistently over the last decade, fuelled by the relatively high incomes of many Emirati households, generous scholarship provision by the UAE government as it seeks to enhance the competitiveness of the Emirati workforce and due to the growing expat community, with expat children returning to their home country for study also counted as international students.

Given the strong historical ties and the large volume of British curriculum private schools in the UAE, the UK has historically been the leading international study destination for UAE students. In 2020/21, after several years of consistent growth, the number of UAE international students studying in the UK rose above 7,000 for the first time. Students from the UAE consist of both Emiratis and expats, of which Indians are the majority. The number of Indian students from the UAE studying in the UK has more than tripled since 2012/2013, reaching 1,795 in 2020/21. In fact, for the past three years, the number of Indian students from the UAE studying in the UK has outnumbered native Emirati students. Although a substantial proportion of Emirati citizens studying abroad are supported by scholarships from the country's government or state-owned companies, expatriate students are generally not eligible for these scholarships and are overwhelmingly self-funded.

While the UAE is an important and growing source market for international students, it has also developed into a regional international education hub, with the number of inbound students coming to the country to study many times greater than the number of outbound students. According to UNESCO, the UAE hosted over 215,000 international students in 2019 with India, Oman, Jordan and Syria amongst its leading source markets. Most of the country's higher education providers are located in the emirates of Dubai and Abu Dhabi, which host large international student populations.

The UAE is also a regional hub for TNE, taking different forms including international branch campuses, degree franchises, and hybrid partnerships between international and local providers. UK institutions are leading providers of TNE within the UAE, with 16,350 TNE and distance learning enrolments recorded in the 2020/21 academic year and a broadly even split between undergraduate and postgraduate provision according to HESA data. The UAE is the UK's largest TNE market in the Middle East region, marginally ahead of Oman and Saudi Arabia, and is one of the UK's top ten TNE markets globally.

2 Introduction

This report was produced by the British Council's *Insight and Engagement* team with external research support provided by Oxford Economics.^[1] This report is designed to provide UK education institutions with unparalleled data, insight and analysis to support their international education strategies, recruitment activities and partnership development work. The report is also targeted at a UK and Emirati policy maker audience, by highlighting opportunities and barriers to education and research cooperation that exist between the two countries.

Using the latest data from the most reliable sources, this Market Intelligence Brief represents a window onto the United Arab Emirates' education system and student population, as well as the economic and demographic factors, and policy priorities and developments that shape the country's international education outlook. The report examines various aspects related to the internationalisation of the UAE's education system – including student mobility, transnational education programmes and research collaboration – and also highlights national level education projects and partnerships between the UK and the UAE.

The information contained in this report is based primarily on desk-based research and data analysis, supplemented with insight and context provided by British Council colleagues on the ground in the UAE.

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Comments, queries and suggestions in relation to this report are welcome and may be submitted to **Kevin Prest, Senior Analyst, Education Insight Hubs** at email kevin.prest@britishcouncil.org

^[1] www.oxfordeconomics.com/

3 Macro Environment

3.1 People

According to the United Nations Population Division, the population of the UAE currently stands at around 10m, with the majority (around 85 per cent) made up of expats. Demographic trends have therefore historically been driven by immigration patterns, with the total population more than tripling since 2000, when the population stood at just over 3m.¹ The rapid expansion of the expat population over the last few decades has been stimulated by government policy aimed at developing large cities in the country, alongside thriving construction, trade and industrial sectors which have offered employment opportunities to immigrants, especially in the emirates of Dubai and Abu Dhabi.

The UAE is world's sixth largest recipient of immigrants and by extension has one of the world's highest proportions of immigrant residents relative to total national population. The stock of immigrants is estimated to have reached 8.43m in 2020, accounting for just over 85 per cent of the population.² Indians constitute a large majority of the expat population (some 40 per cent), with the India to UAE migration corridor the third largest in the world, many of whom are temporary labour migrants. Other leading ethnicities include Bangladeshi, Pakistani and Egyptian.³ Workers' remittances sent from the UAE are estimated to have reached US\$43bn in 2020, making it the world's second largest source of remittances after the US, and the largest source of remittances for Asian countries.

The rate of growth of the UAE population peaked in the mid-2000s, growing at around 16 per cent per year in 2006 and 2007. However, since then, population growth has slowed considerably, averaging around one per cent per year over the last decade. This marked slowdown in growth is expected to continue, with total population expected to grow to around 10.7m by 2030, before beginning to decline from 2035, with the population expected to fall to around 10.4m by 2050.

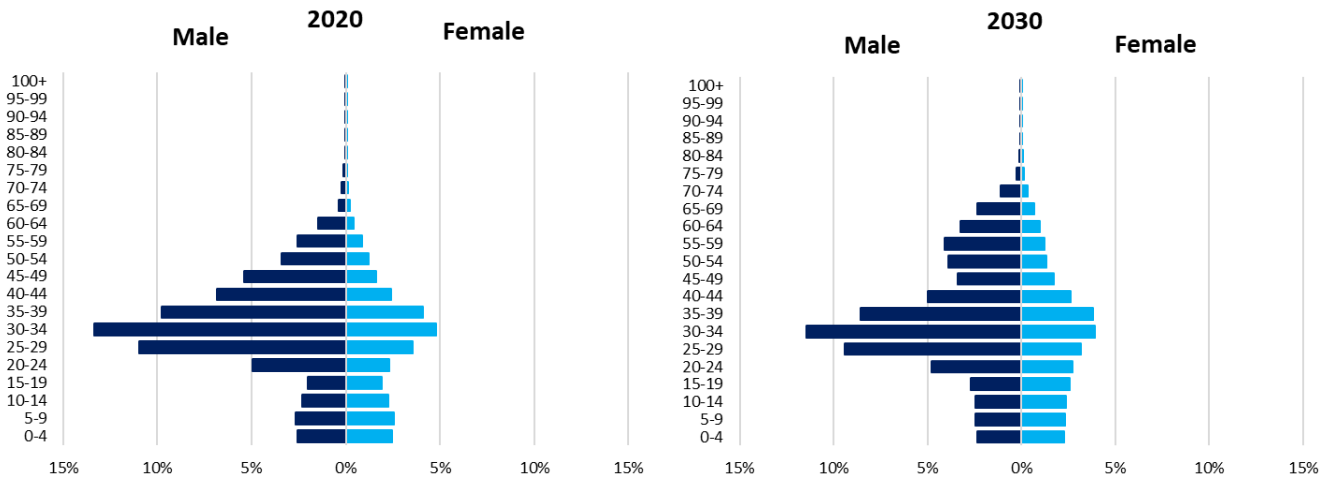
The dominance of expat workers has had significant implications for the age and gender profile of the wider population. Specifically, as at 2020, there were more than twice as many males within the UAE population as compared to females, with males accounting for almost 70 per cent of the total population. Further, the majority of males are of prime working-age, with almost half of the male population aged 25-39. Looking at the male and female populations combined, just over one per cent of the population was aged over 65 in 2020. As such, the UAE has a somewhat unconventional population pyramid compared to most other countries around the world.

¹ World Population Prospects, *United Nations Population Division*, 2019, <https://population.un.org/wpp/>

² World Migration Report, *The International Organization for Migration*, 2022, <https://publications.iom.int/books/world-migration-report-2022>

³ United Arab Emirates, *Migration Policy Institute.*, 2022, www.migrationpolicy.org/country-resource/united-arab-emirates

Figure 1: UAE's population pyramid, 2020 and 2030



Source: UN Population Division

Looking at the student age (15-29) population, it stood at just over 2.5m in 2020, with historic trends again driven by immigration patterns, particularly in the 20-24 and 25-29 sub-categories, where population peaked in 2011. In the period to 2030, only marginal growth in the student age population is expected, reaching 2.7m, primarily driven by growth in the 15-19 age band which is expected to expand by 44 per cent between 2020 and 2030.

In 2020, more than 87 per cent of the UAE population lived in urban areas. In 1995, the urbanisation rate stood at 78 per cent, and since then it has been rising steadily due to the rapidly expanding cities of Dubai and Abu Dhabi, which are also the wealthiest in the nation. The population is heavily concentrated in the three largest emirates, Dubai, Abu Dhabi and Sharjah which are home to around 85 per cent of the population.⁴

Although Arabic is the official language of the government, English is the most spoken, especially for business, trade and tourism. Other languages spoken by expat communities include Hindi, Urdu, Bengali, Tamil, Tagalog, Persian, Chinese, Malayalam.⁵ Arabic is taught in schools, and most native Emiratis speak a dialect of Gulf Arabic that is generally similar to that spoken in surrounding countries. Government offices and affairs are conducted in Arabic, as are published rules and laws.⁶

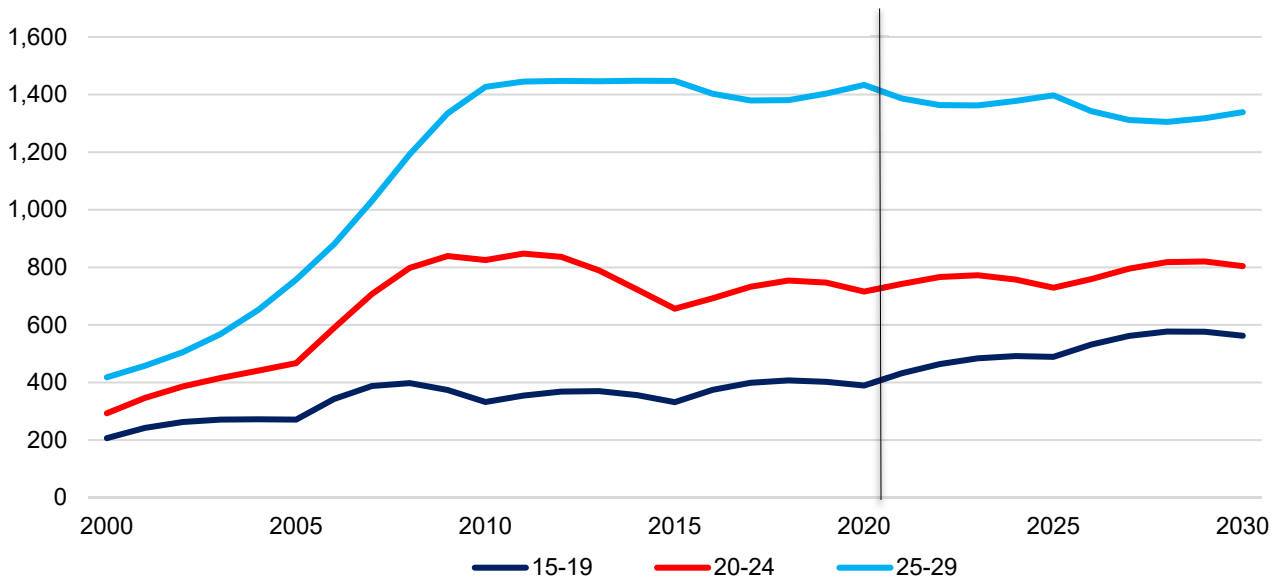
About 60 per cent of the population is Muslim, of which roughly 80 per cent belong to the Sunni branch of Islam. There are also small but growing numbers of Christians and Hindus in the country.

⁴ United Arab Emirates Population, *World Population Review*, 2022, <https://worldpopulationreview.com/countries/united-arab-emirates-population>

⁵ Most Spoken Languages In UAE, *UAE Moments*, 2022, www.uaemoments.com/most-spoken-languages-in-uae-404668

⁶ United Arab Emirates, *Britannica*, 2022, www.britannica.com/place/United-Arab-Emirates/Languages-and-religion

Figure 2: UAE's student age population (000s)



Source: UN Population Division

3.2 Economy

The UAE is predominantly an oil economy, with about 30 per cent of the country's GDP contributed by its oil and gas output. The UAE was the seventh largest oil producer in the world in 2021, with output averaging close to 3.79m barrels per day, according to the US Energy Information Administration.⁷ However, the contribution of the oil economy has been shrinking on the back of economic diversification policies adopted by the government over recent decades, with the oil sector's contribution to GDP at a considerably higher 44 per cent in 2000.

The country consists of seven emirates, namely Abu Dhabi (the capital), Dubai, Sharjah, Ajman, Umm Al Quwain, Ras Al Khaimah and Fujairah, with oil wealth concentrated in Abu Dhabi. Behind Abu Dhabi, Dubai has the second largest economy of the emirates and is one of the most important trade hubs in the world. Other emirates are less affluent, and their economies depend on transfers from Abu Dhabi and the federal government, which pays for the provision of basic services such as health and education.

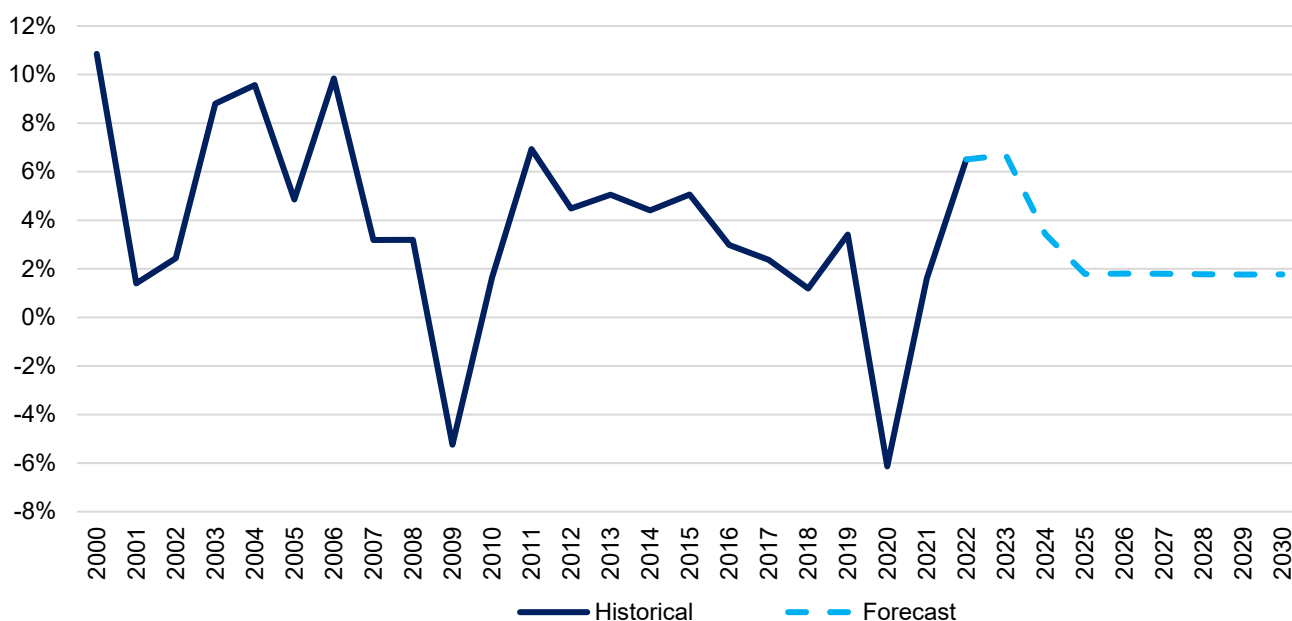
The UAE is a member of the GCC. This means that the UAE government participates with its fellow GCC member states to agree on economic issues of common interest, including trade and tax policies, investment, banking and finance, and other areas. The UAE is also part of a GCC customs union established in 2003.

Economic growth trends in the UAE have historically moved in tandem with developments in global oil markets, not only because of the large contribution of the oil sector to total GDP, but also because oil revenues are reinjected into the economy through public spending, which is the primary source of financing for most development projects. The economy experienced robust GDP growth in the 1970s, followed by high levels of volatility during the 1980s and 1990s,

⁷ What countries are the top producers and consumers of oil? EIA, 2022, www.eia.gov/tools/faqs/faq.php?id=709&t=6

reflecting large swings in oil prices. Between 2003 and 2008, rising oil prices induced a surge in development, with GDP growth averaging nearly 7 per cent per year. However, in 2009, global recession and plunging oil prices coupled with the collapse in domestic property prices caused a GDP contraction of 5.2 per cent. With oil prices recovering, growth averaged around 5 per cent per year in 2011-2014 but sharp declines in prices from late 2014 until early 2016 led to firm fiscal tightening across the GCC, with UAE economic growth slowing to around 2.3% per year between 2016 and 2019.

Figure 3: UAE's real GDP growth



Source: Haver Analytics / Oxford Economics

In common with many other oil-dependent economies, the UAE was hit hard by the Covid-19 pandemic, with GDP contracting by 6.1 per cent in 2020 as both oil and non-oil activity contracted sharply. However, the UAE was a world leader in terms of its vaccination programme, which together with the gradual phasing out of oil production cuts and monetary and fiscal stimulus packages, led to a robust economic recovery in 2021, with growth of around 1.6 per cent estimated for the year. Growth is expected to accelerate in 2022 and 2023 to around 6.5 per year, with the surge in oil prices due to the Russia-Ukraine conflict boosting the UAE's fiscal and external balances. In the medium term, growth is expected to settle just below 2 per cent per year. However, a downside risk to the outlook is posed by the tourism-dependent nature of Dubai's economy, where both Russia and to a lesser extent, Ukraine, have been important tourist source markets over recent years.

In the labour market, despite concerted government efforts to boost Emirati employment in the private sector (known as Emiratisation), private sector employment is dominated by expats. According to the Labour Force Survey conducted in 2019, 78 per cent of working Emiratis were

employed in the government sector, including the federal and local governments, and only 8 per cent of them were employed by the private sector. By contrast, almost three-quarters of expats worked in the private sector and only 7 per cent were employed by the government.⁸

In the UAE, the unemployment rate has traditionally been low at around 2-3 per cent in the last couple of decades, with the expat population and by extension, the labour supply, highly responsive to general economic conditions within the country. The unemployment rate increased by around one percentage point in 2020, up to 3.2 per cent as the pandemic weighed on the economy. However, looking ahead, employment levels are expected to return to pre-pandemic levels relatively quickly, by mid-2023.

The UAE dirham has been pegged to the US dollar since 1980 at 3.67 per dollar, which has to a large extent kept domestic inflation in check. Further, the exchange rate peg facilitates a relatively stable international purchasing power of the dirham abroad, which in turn makes for a predictable cost of living and tuition for UAE international students in foreign countries.

As aforementioned, a key economic priority of the UAE government is its Emiratisation program, which aims to increase the employment and competitiveness of Emirati citizens. The onset of the program dates back to 1980, but until a decade ago it was executed only in the public sector, with little emphasis on employment of Emiratis in the private sector. Now, private sector employment must comply with pre-set quotas for Emirati employment.

In September 2021, the government announced 13 initiatives to be implemented under a comprehensive federal programme called 'NAFIS' (which translates to English as "compete"), to further incentivise and promote the employment of Emiratis in the private sector. The programme aims to increase Emirati private sector employment to 10 per cent of total private sector employment by 2025, only in skilled labour positions. This percentage will be enforced over five years to 2025, initially starting in the first year with a 2 per cent Emirati employment requirement. Within the same announcement, the government pledged AED24bn (US\$6.5bn) to create 75,000 private sector jobs for Emiratis.⁹

3.3 Government and education policy

The federal Ministry of Education (MoE) regulates public education in the UAE, including in the higher education sector. However, private education in Dubai, Abu Dhabi and (more recently) Sharjah are overseen by their own regulatory bodies, namely the Knowledge and Human Development Authority (KHDA), the Department of Education Knowledge (ADEK), and Sharjah Private Education Authority, in each emirate respectively. In the other emirates, the MoE supervises all forms of education through local branches and educational zones, from elementary school to university, and sets curricula, admissions standards, and graduation requirements in the school system.

⁸ Labour Force Survey, *Federal Competitiveness and Statistics Authority*, 2019, <https://fcsc.gov.ae/en-us/Pages/Statistics/Statistics.aspx>

⁹ Second set of 'Projects of the 50' – NAFIS, *United Arab Emirates government*, 2021, <https://u.ae/en/about-the-uae/initiatives-of-the-next-50/projects-of-the-50/second-set-of-projects-of-the-50#>

According to a law issued in 2012, education is compulsory and is a fundamental right of every citizen of the UAE, meaning that the government provides free education to every citizen from six years of age until its completion (grade 12) through public schools and educational institutions.¹⁰ Thus, public education is fully financed by the government and is provided free of charge to all UAE nationals up to the university level. Public school enrolment is also accessible to non-UAE citizens, provided they pay a tuition fee. However, public schools only account for around a quarter of enrolment in the UAE, with the private sector playing a crucial role in education provision across the country.

The national education system features a K-12 school system, with kindergarten followed by 12 subsequent grades. The medium of instruction in public schools is Arabic, with English taught as a second language and integrated into other subjects, such as mathematics and science.¹¹

Consistent with its long-term vision, the government of the UAE took a set of decisions to aid the advancement of the education system in the country.¹² Key developments included:

- Merging the Ministry of Education and the Ministry of Higher Education (in 2016) into one Ministry managed by three ministers, that are responsible for education planning and management from the early childhood stage until the completion.
- Developing a new “Emirati School” system and gradually rolling it out (starting in 2017) to all public schools across the country, including in Abu Dhabi which previously adopted a separate system.

The new school model touched all aspects of public education, including education ladder and learning paths, evaluation, curricula, quality control and monitoring, teaching, and extra-curricular activities. Underpinning the new system was the goal to equip students with a wide range of relevant skills, while instilling noble values such as tolerance, strengthening national identity and stimulating innovation, creativity and critical thinking.

As part of the system overhaul, the UAE abolished the previous system which split secondary students into scientific and literary streams and replaced it with a new two-track system, which splits students into either an academic or a technical/vocational stream, starting from grade 9. This was motivated by the aim of facilitating the enrolment of high school graduates directly into universities without having to go through a foundation year, especially in engineering, medical and natural sciences programmes in the UAE’s universities and overseas.¹³ UAE universities eliminated foundation years in 2018, although around 70% of students from the UAE studying in the UK still must go through a foundation year, primarily due to the fact that the Emirati EmSAT exam is still not recognised in the UK.

¹⁰ Education System in Abu Dhabi, TMM, 2022, www.tamm.abudhabi/en/aspects-of-life/educationtraining/schools/EducationDevelopment/education-system-in-abu-dhabi.

¹¹ Education in the UAE, Embassy of the United Arab Emirates, 2022, www.uaecd.org/k-12-education

¹² The UAE Education System, Ministry of Education, 2020, www.moe.gov.ae/En/ImportantLinks/Documents/matrix/MOEducationSystem2020-2021.pdf

¹³ Quality Education, United Arab Emirates government, 2022, <https://u.ae/en/about-the-uae/leaving-no-one-behind/4qualityeducation>

In September 2017, the MoE launched the National Strategy for Higher Education 2030. The strategy is based on four key areas:

- Access to high-productivity education institutions, high student completion rate, and integrated academic programmes supported by effective funding mechanisms.
- Developing an enabling environment for scientific research that qualifies and attracts the best researchers and provides competitive funding that focuses on achieving effective research results that contribute to the advancement of a knowledge-based economy.
- Preparing a generation of graduates eligible to compete in the labour market in the public and private sectors, by building partnerships with the private sector at all stages of higher education, through the design and launching of programmes and training.
- Supporting higher education institutions to compete globally by applying high quality accreditation standards, providing incentives for institutions, and qualifying distinguished teachers.

4 Domestic Education Environment

4.1 Overview

The UAE has one of the most developed education systems in the Middle East and North Africa region. Indeed, since the setup of the federal union over five decades ago, the education system has rapidly evolved to become a globally competitive system that caters for a diverse resident population.

Overall, the UAE ranked 16th out of 144 countries in the World Economic Forum Global Competitiveness Index (2017-2018)¹⁴ for the quality of its primary education system, but student performance in the latest Programme for International Student Assessment (PISA) rankings showed students gaining scores well below the mean in all subjects. Compared to the OECD average, a smaller proportion of students in the UAE performed at the highest levels of proficiency (Level 5 or 6) in at least one subject and at the same time a smaller proportion of students achieved a minimum level of proficiency (Level 2 or higher) in at least one subject.¹⁵

To improve the quality and outcomes of the education system, the government is prioritising teaching quality and learning outcomes as well as promoting careers in teaching among Emiratis. The MoE developed a ten-year strategy (2010-2020) to improve student outcomes and the school environment and to provide access to affordable and high-quality education. Staff capacity is also a problem. The shortage of teachers in the region as a whole is reportedly amongst the highest in the world, reflecting an overall scarcity of teachers globally, and a reluctance among nationals to become teachers.¹⁶ The ten-year strategy included hiring more internationally accredited teachers.

The education system within the UAE is highly privatised, with demand for private education high due to the majority expat population, which has historically shown a strong preference for international style education which facilitates mobility. The country has successfully attracted significant investment in its private education sector, bringing the share of private schools to 64 per cent of the total number of schools in the country. According to KHDA, in September, the number of students attending private schools in Dubai surpassed 300,000 for the first time, representing growth of around 5 per cent from the previous year.¹⁷

Private education provision varies significantly in terms of quality, qualifications offered, curricula and teaching medium, with the strong growth in the number of private schools over recent years creating intense competition within the sector. Issues of oversupply have arisen in some emirates, such as Dubai, which is highlighting the need for private education providers to re-evolve and develop unique selling points. A government-imposed limitation on fee increases in the private

¹⁴ Global Competitiveness Index 2017-2018, *World Economic Forum*, 2018, <https://reports.weforum.org/global-competitiveness-index-2017-2018/competitiveness-rankings/#series=EOSQ129>

¹⁵ Program for International Student Assessment (PISA) Results, *OECD*, 2018, www.moe.gov.ae/Ar/ImportantLinks/InternationalAssessments/Documents/PISA2021/ENG/International-Reports/PISA2018_UAE%20Results.pdf

¹⁶ Number of students in UAE expected to rise 4% annually, *Gulf News*, 2016, <https://gulfnews.com/uae/education/number-of-students-in-uae-expected-to-rise-4-annually-1.1816796>

¹⁷ Dubai private schools sector records highest ever enrolment, *KHDA*, 2022, <https://web.khda.gov.ae/en/About-Us/News/2022/Dubai-private-schools-sector-records-highest-ever>

education market has presented some with challenges, with fees unable to keep pace with rising costs. Nevertheless, the country is known for having some of the highest fees in the world.

4.2 Early years, primary, secondary

Public and private schools in the UAE follow different curricula. Public schools, which represent around 36 per cent of all schools in the UAE, offer the national curriculum as set by the MoE and mostly cater for Emirati students. Meanwhile, private schools, which represent around 64 per cent of all schools in the UAE, offer 14 other curricula, including American, British, French, German, Indian, International Baccalaureate (IB), and Pakistani curricula.

The “Emirati school” system (public system) is overseen at national and regional level and is divided into three main cycles (primary to upper-secondary), as well as kindergarten. Students can enrol in technical and vocational education from upper-secondary level, where general education is divided into an academic track and a technical and vocational track. Pre-school is optional, but take up is generally high, with the gross enrolment ratio for kindergarten exceeding 94 per cent in 2019/2020.¹⁸

The academic track is split into three streams, all of which include Arabic and English languages, Islamic education, social studies and national education, and moral studies as common subjects. The three streams are differentiated as follows:

General Stream: Students study basic scientific subjects that enable them to enrol in some applied science specialisations at university. Subjects included are mathematics, physics, chemistry and biology, in addition to computer science, and creative design and innovation. Other languages such as French, Chinese and Japanese are taught in school language clubs during extracurricular classes. Students also study business administration (in English) in grades 9 and 10, along with emphasis on entrepreneurial projects and work, to prepare students for the labour market. This track also involves studying arts in all grades, including visual art, drama and music.

Advanced Stream: This stream is designed to qualify graduates to study science, engineering, and medicine at university. It includes the same scientific subjects as under the General Stream, but with deeper and more comprehensive coverage. Physics and biology are taught in English in grade 9, whereas mathematics is taught in English for grades 9 and 10.

Elite Stream: This stream is designed for students who have excelled academically in science and mathematics in particular. To enrol in this stream, students must sit a test that evaluates their Arabic and English language ability, mathematics, science, and problem-solving skills, as well as their IQ level. This is followed by an interview, after which a student admissions committee selects successful students. Under this stream, students study advanced English language, science and mathematics. In addition, students take an elective course in either biology or statistics if they are opting for engineering or medicine specialties, respectively. Elite Stream students are expected to sit three advanced level tests in mathematics, physics and chemistry. Upon completion, students compete to study in the best local and international universities.

¹⁸ Education Statistics, *Federal Competitiveness and Statics Authority*, 2020, <https://fcsc.gov.ae/en-us/Pages/Statistics/Statistics-by-Subject.aspx>

Throughout the public schooling system in the UAE, student assessment is carried out through the Emirates Standardized Test (EmSAT). The “baseline” test is taken in grade 1 to measure basic skills in Arabic, English and numeracy. The “advantage” test then tracks the development of students during their general education journey in grades 4, 6, 8, and 10. Finally, in grade 12, students sit the EmSAT “achieve” tests, which determine entry to higher education.¹⁹²⁰

4.3 Technical & vocational education and training

According to the UAE government, the country needs to produce ten Emiratis with vocational skills for every university graduate produced to achieve a sustainable and diversified knowledge-based economy. Therefore, a key area of focus is on building a national system to ensure quality TVET provision.²¹

As aforementioned, in the UAE students can enrol in TVET from upper-secondary level. At this level provision is made through Applied Technology High Schools (ATHS) and Secondary Technical Schools (STS), of which there were ten and eight in the UAE in 2020 respectively. ATHS are located in every emirate across the country and offer studies for grades 8-12, with some schools accepting students as early as from grade 6. Two programmes of study are offered, which are the ATHS Core Programme and the Advanced Science Programme. Upon completion, students are awarded the Applied Technology Secondary Certificate. Meanwhile, STS offer studies for grades 10-12, focussing on technical and technology education. The UAE MoE Grade 12 Secondary Technical School Certificate is awarded upon completion

At the post-secondary level, TVET provision is made via the country’s Institutes of Applied Technology (IAT), of which there were 20 in 2020. IAT offer programmes in the engineering, aviation, and healthcare sectors at the higher diploma and bachelor’s level.

The UAE’s National Qualifications Authority (NQA) is the federal entity that is responsible for developing and maintaining a framework for national qualifications and regulating the TVET sector in the country. NQA recognizes TVET awarding bodies and endorses national vocational qualifications in the UAE. The entity extends its services to TVET institutions, as well as to individuals who provide education and training at TVET-licensed institutions in the country. All national vocational certificates issued by NQA’s awarding bodies are accredited for employment purposes. Vocational Education and Training Awards Council (VETAC) is a supervisory and regulatory body at the federal level. It was set up to manage and coordinate vocational, technical and professional education and training sector in the UAE, under the auspices of the NQA.

In Abu Dhabi, the Abu Dhabi Centre for Technical and Vocational Education and Training (ACTVET) is authorized to regulate TVET within the Emirate of Abu Dhabi. Meanwhile, Qualifications and Awards in Dubai (QAD) is the arm of KHDA responsible for regulating the TVET sector, and to quality assure TVET qualifications in Dubai. QAD was established in 2014 and it

¹⁹ Emsat, *United Arab Emirates Ministry of Education*, 2022, <https://emsat.moe.gov.ae/emsat/default.aspx>

²⁰ How to Prepare for the EmSAT Exam, *EDOXI Training Institute*, 2022, www.edoxitraining.com/studyhub-detail/how-to-prepare-for-the-emsat-exam

²¹ Technical and Vocational Education, *UAE government*, 2022, <https://u.ae/en/information-and-services/education/technical-and-vocational-education>

operates under the rules and regulations of KHDA. However, its awarding body functions are regulated by the NQA and VETAC.²²

4.4 Higher education

According to the MoE, there were 72 licensed higher education institutions (HEIs) in the UAE as of 2018.²³ This includes only five public institutions, with the rest being private. HEIs in the UAE include:

- Federal institutions which provide free education for Emirati citizens, including UAE University, Zayed University, Higher Colleges of Technology, National Defence College, and Emirates Diplomatic Academy.
- Private institutions owned by the local government.
- Private institutions owned by individuals.

Many of these institutions have been established in recent years as the UAE has promoted itself as an education hub and offered incentives to attract foreign and independent providers. The country has become an increasingly popular destination for students from abroad, with the UAE hosting 215,000 international students in 2019 according to UNESCO. As at 2019/20, there were almost 300,000 students enrolled at UAE HEIs, around three times higher than a decade earlier. Most institutions are found in Abu Dhabi and Dubai, with higher education enrolment growing fastest in Dubai, which offers more universities than any other emirate, including international branch campuses.

Overall, the UAE ranked 36th in the world in the category of higher education and training out of 137 countries in the World Economic Forum's Global Competitiveness Index (2019). In the 2016-2017 version of the report, recommendations advised that the country strengthen its capacity for innovation by upgrading scientific research and leveraging digital technologies. Since then, the UAE has announced a collaboration with Stanford University to develop a new university curriculum with a focus on training in innovation and entrepreneurship. Despite a government commitment to promote STEM subjects, business and economics remain by far the most popular subjects for university graduates, and a recent report from PwC Middle East indicated that development funding for STEM is still much needed.²⁴

Entry to higher education is via the National Admissions and Placement Office (NAPO) for Emirati students (or students with an Emirati mother), while expatriate students must apply directly to individual institutions. Students who apply through NAPO are required to take EmSAT tests in English, mathematics, science and Arabic, aiming to achieve the required scores as set by their preferred HEI. High-performing Emirati students are also eligible for scholarships to study abroad under the sponsorship of the MoE.²⁵

²² TVET Country Profile, *United Nations*, 2022, <https://unevoc.unesco.org/home/Dynamic+TVET+Country+Profiles/country=ARE>

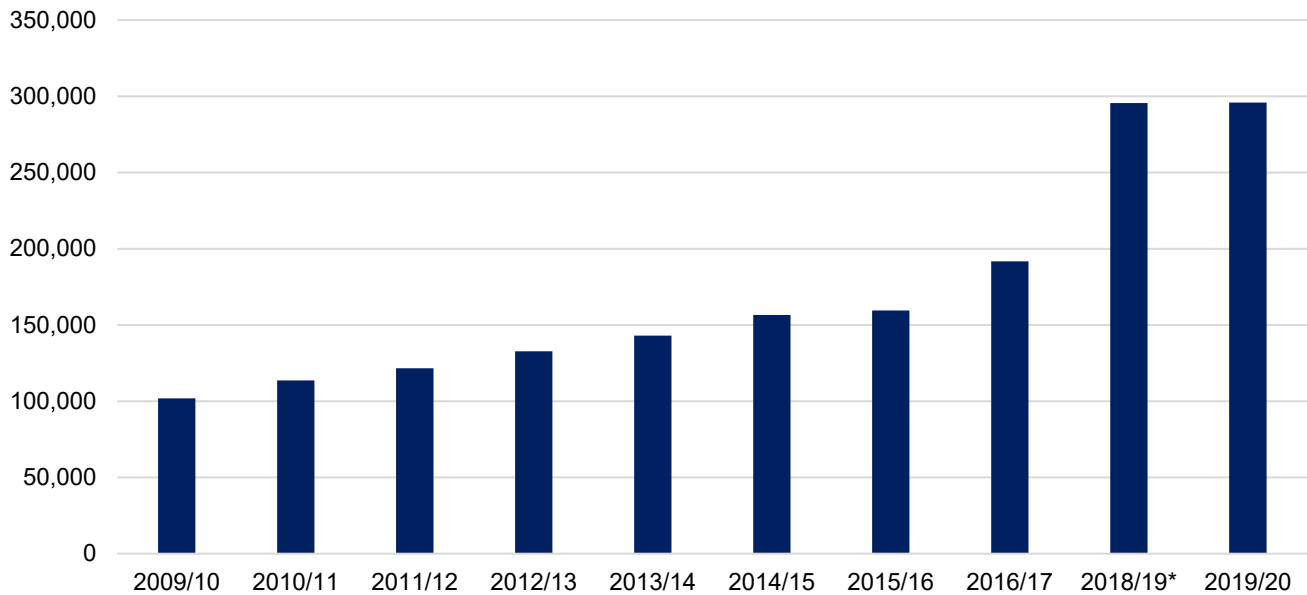
²³ List of licensed Institutions in UAE, *Ministry of Education*, 2022, www.moe.gov.ae/En/MediaCenter/News/Pages/licensedInstitutions.aspx

²⁴ Education Sector in UAE, *PwC*, 2022, www.pwc.com/m1/en/industries/education/education-country-profile-united-arab-emirates.html

²⁵ Admission of UAE nationals to colleges and universities, *UAE Government Portal*, 2022, <https://u.ae/en/information-and-services/education/higher-education/joining-higher-education-institutions/-admission-to-colleges>

While the state’s TVET provision is expanding, there is a clear preference for university courses among students and parents. Tuition is subsidised for national students at public institutions, and these students may also access scholarships to study at private HEIs in the UAE or overseas. Fees usually apply for all other students. For non-nationals, higher education in the UAE is among the most expensive in the world, and rising tuition fees and associated costs are also a challenge for low-income Emiratis.

Figure 4: UAE’s higher education students



Source: UNESCO and Federal Competitiveness and Statistics Authority. *2017/18 data unavailable

The MoE through its Academic Accreditation Commission (AAC) is responsible for the accreditation of private institutions. The commission was established in 2000, with the mandate of handling institutional licensing of governmental, local and private higher education institutions and the adoption of academic programmes within these institutions. AAC provides licensing and renewal of the HEIs, accreditation of academic programmes, periodic renewal of accreditation, and the processing of requests for fundamental changes in the institutions or programmes offered. The MoE is currently working on improving the accreditation process.

5 International Education

5.1 Student mobility

According to estimates from UNESCO, 13,480 students from the UAE travelled abroad to study at the higher education level in 2019. The volume of outbound international students from the UAE has been rising steadily over the years, with average annual growth rate of around 6 per cent between 2010 and 2019. On the global scale, the UAE is a relatively small outbound market, and has a larger role as an inbound market.

There are several core drivers of the growing demand for overseas education in the UAE. First, the relatively high incomes of Emirati families, coupled with scholarship opportunities provided by the government makes sending children to study abroad affordable for many Emirati households. Like students from many Gulf countries, education abroad is popular, and Emiratis are attracted to perceived high-value institutions and qualifications. Second, the presence of a large expat community who study international curricula makes studying abroad a natural option, with expat children returning to their home country for study also counted as outbound international students from the UAE. Third, the UAE government is supportive of international study, particularly in the context of its initiatives to upskill the national labour force, increase competitiveness of Emiratis, and achieve its Emiratisation targets. Study abroad was a focus of the UAE Vision 2021 and Abu Dhabi 2030 Economic Vision, with the government providing several channels through which prospective Emirati international students can apply for government funded scholarships.

Because of the UAE's robust school system and the abundance of international schools, including those providing the British curriculum, the country is not a major market for UK schools or boarding schools. Thus, for the UK, the UAE remains almost exclusively a market for higher education.

Given the strong historical ties and the large volume of British curriculum private schools in the UAE, the UK has historically been the leading international study destination for UAE students. After remaining stable at just above 3,000 between 2009/10 and 2012/13, the number of UAE international students enrolled at UK HEIs has increased every year since 2013/14, rising above 7,000 for the first time in 2020/21.

Students from the UAE consist of both Emiratis and expatriates. A substantial proportion of Emiratis studying abroad are supported by scholarships from their government or state-owned companies, with data from HESA showing that around half of UAE citizens studying in the UK in the 2020/21 academic year received funding from their government or other overseas funding sources.

Major scholarship funders include the UAE Ministry of Education,²⁶ the Abu Dhabi Department of Education & Knowledge,²⁷ and the Abu Dhabi National Oil Company.²⁸ These scholarships are

²⁶ Scholarship Request, *UAE Ministry of Education*, 2022 www.moe.gov.ae/En/EServices/ServiceCard/pages/Scholarships.aspx 2022. Details of the programme, student requirements and links to more information can be found under the "Conditions" heading.

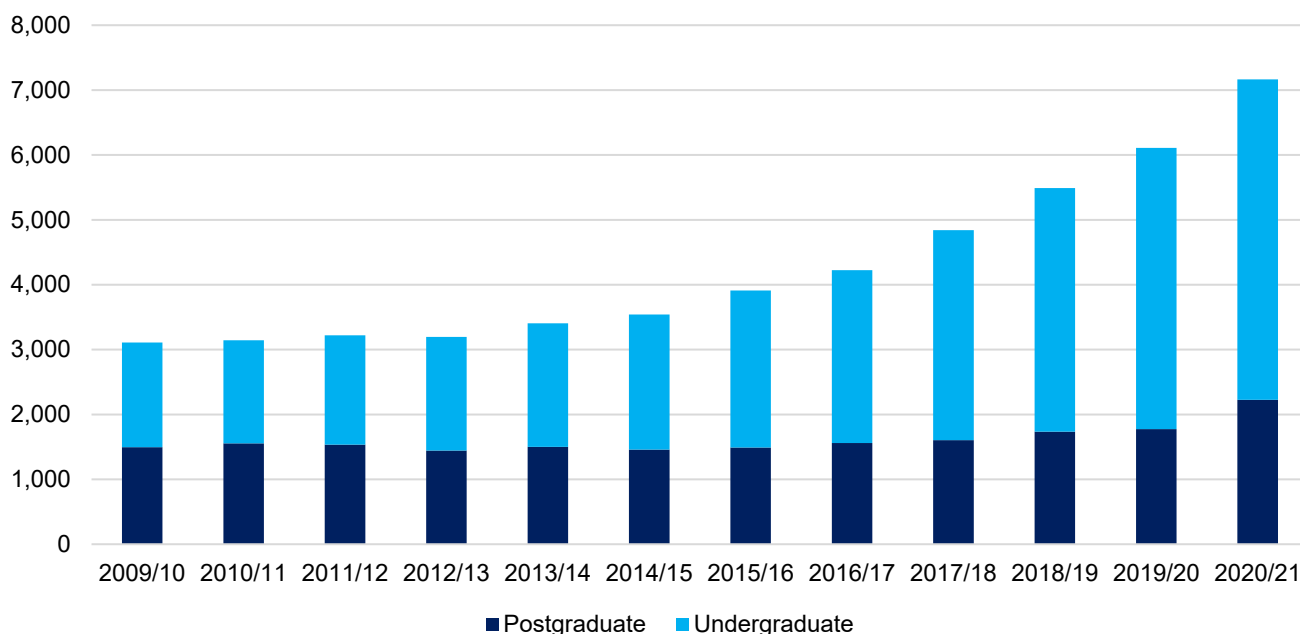
²⁷ Abu Dhabi Scholarships, *Abu Dhabi Department of Education & Knowledge*, 2022 <https://sds.adek.gov.ae/>

²⁸ Scholarship Program, *Abu Dhabi National Oil Company*, 2022 https://jobs.adnoc.ae/content/SCHOLARSHIP-PROGRAM/?locale=en_US

often restricted to a number of top overseas universities or need applicants to meet certain academic or language requirements. Further details can be found on the relevant scholarships' web pages.

In contrast, expatriates living in the UAE are generally not eligible for these scholarships. Nevertheless, the large number of expatriate families in the country and the high fees for non-citizens at local universities means that this group accounts for the majority of all HE students going abroad from the country. Indian nationals make up the largest group and the number of Indian students from the UAE studying in the UK has more than tripled since 2012/2013, reaching 1,795 in 2020/21. In fact, for the past three years, the number of Indian students from the UAE studying in the UK has outnumbered native Emirati students.

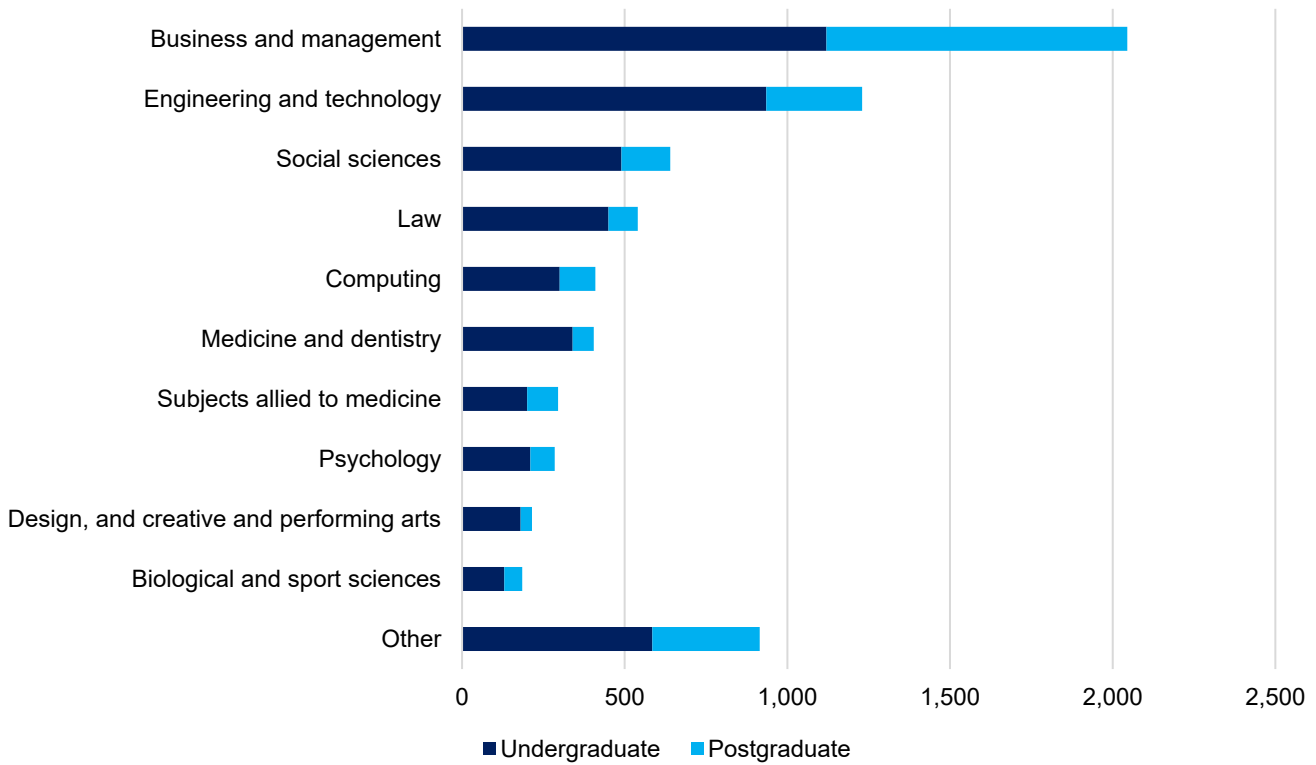
Figure 5: UAE students in HE programmes in the UK



Source: HESA

In terms of subject areas, business and management is by far the most popular broad subject area for students from the UAE, both at undergraduate and postgraduate level. Overall, 2,045 students studied business and management in 2020/21, which represents around 30 per cent of the overall total. The next most popular subject choices with UAE students were engineering and technology (17 per cent of the overall total), social sciences (9 per cent) and law (8 per cent). The subject area breakdown of students from the UAE studying in the UK has been very stable over the past five years, with the top four most popular subjects in 2020/21 the same as those identified in 2015/16, in the same order.

Figure 6: Subjects studied by UAE HE students in the UK, 2020/21

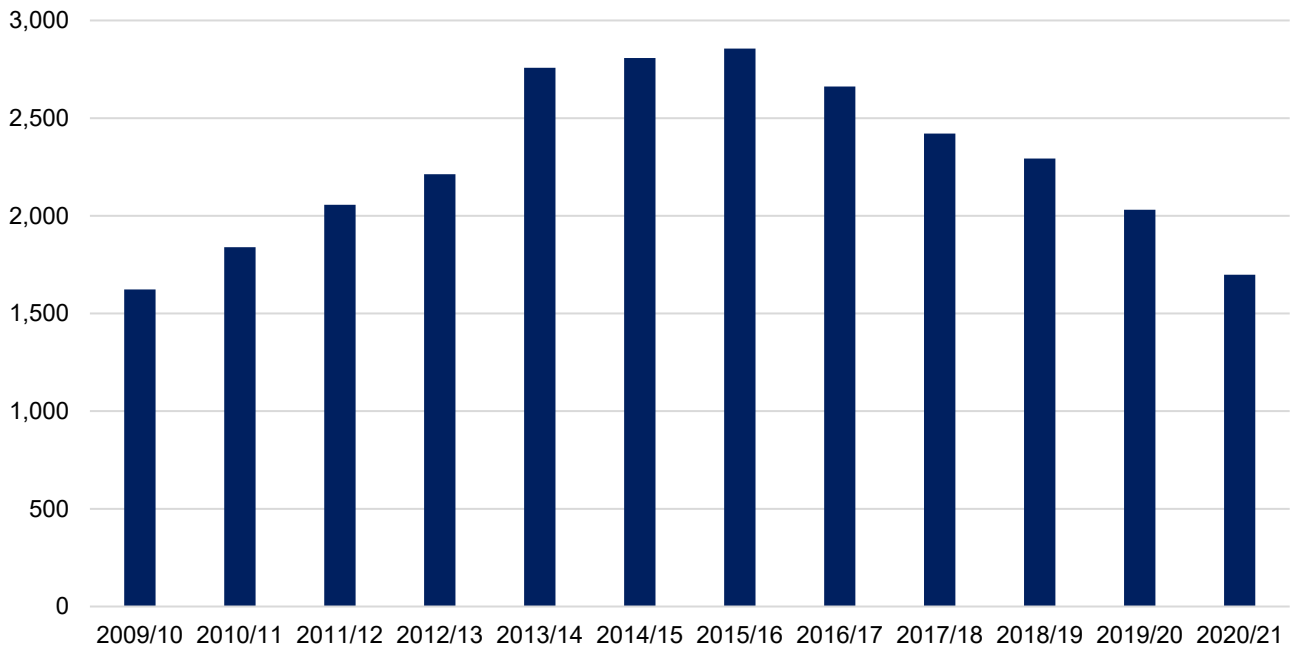


Source: HESA

Over the last decade, the share of UAE international students studying at Russell Group institutions has grown consistently year-on-year, rising from 31 per cent in 2010/11 to just over 40 per cent in 2020/21. In absolute terms, the number has risen from 985 in 2010/11 up to 2,895 in 2020/21, thus almost tripling over the decade. Indian students from the UAE have been the leading source of Russell Group enrolments historically, outnumbering native Emirati students in each of the last ten years. In 2020/21, the most popular Russell Group universities with UAE international students were the University of Leeds (245 enrolments), King’s College London (235) and the University of Manchester (205).

After the UK, the US has traditionally been the second most popular destination market for international students from the UAE. After several years of consistent and strong year-on-year growth, the number of UAE students enrolled in the US peaked at almost 2,900 in 2015/16. However, since then, there has been a consistent downward trajectory, with the volume of students falling every year since. Much of the decline has been attributed to the “Trump effect”, an anti-immigration climate, unfavourable political rhetoric and tightened restrictions on H1-B visas. The decline in UAE international students studying in the US over recent years was further accentuated in 2020/21, with a year-on-year contraction of 16 per cent recorded, with the Covid-19 pandemic having a negative impact on student mobility.

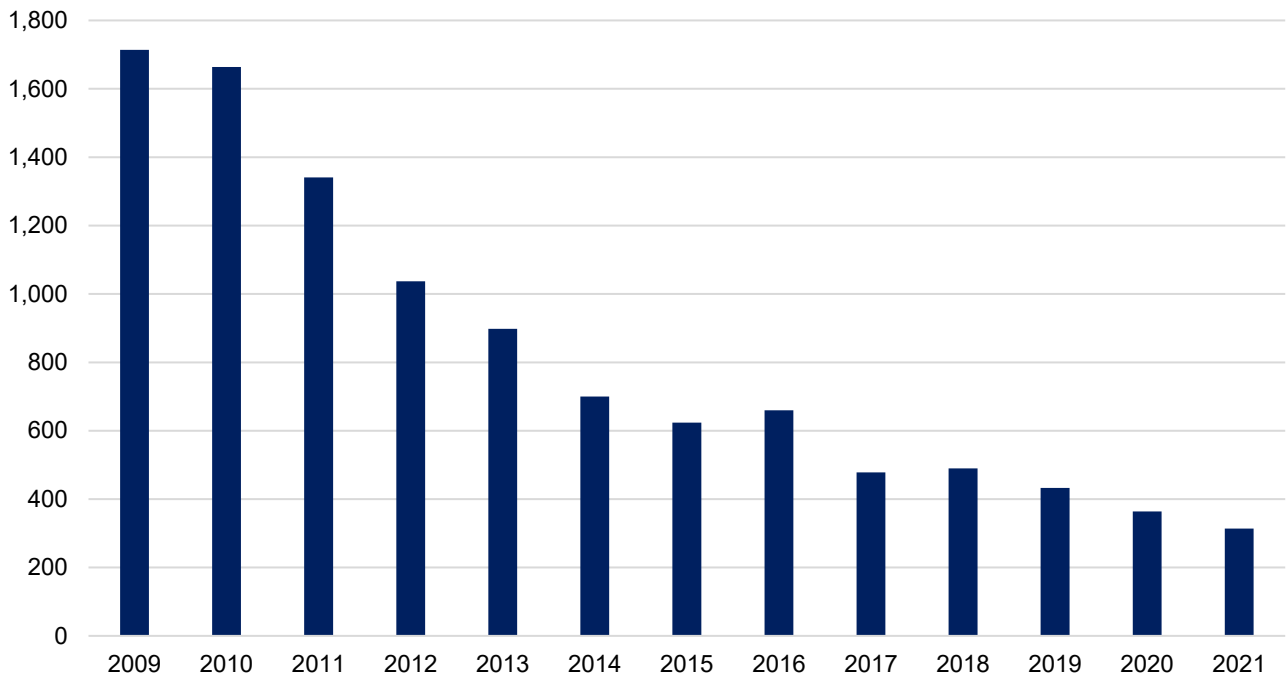
Figure 7: UAE HE enrolments in the US



Source: IIE (Note: OPT students excluded)

The volume of international students from the UAE studying in Australia has declined significantly over recent years. In 2009, there were just over 1,700 UAE international students recorded, but after year-on-year declines in almost every year since, the number had dropped to just over 300 in 2021, meaning that UAE student flows to Australia are now of a largely insignificant scale relative to flows to the UK and US.

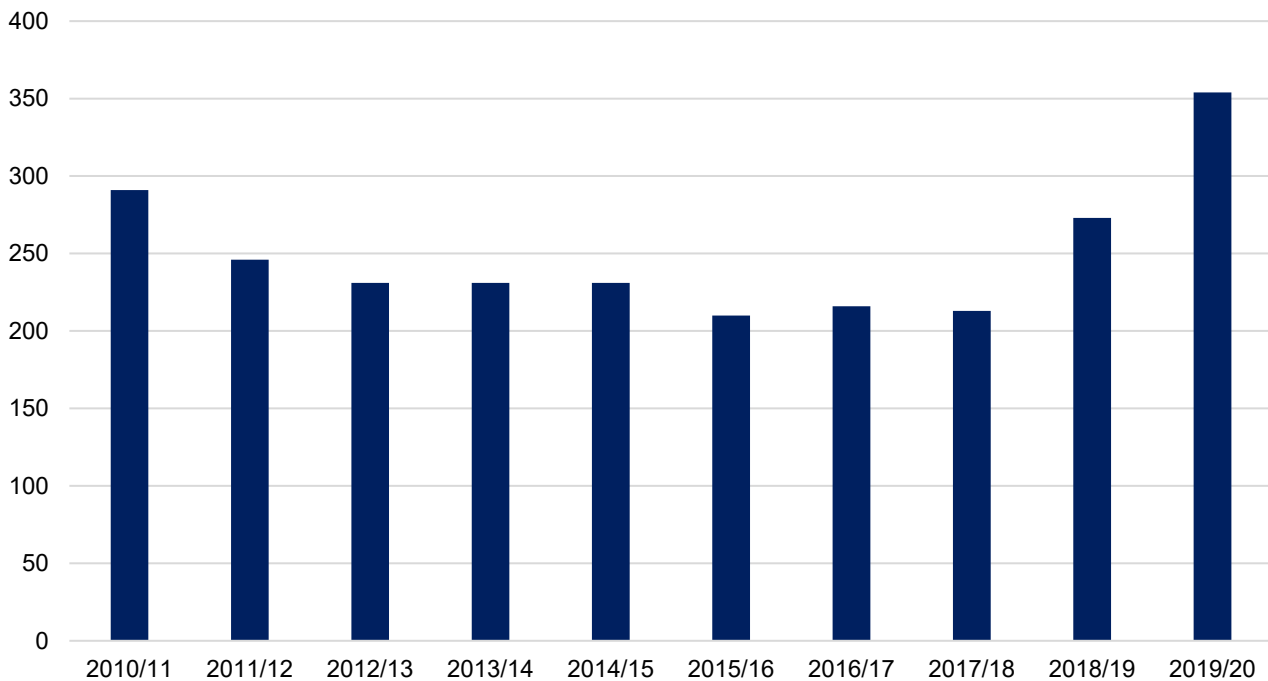
Figure 8: UAE HE enrolments in Australia



Source: AusTrade

UAE international student enrolments in Canada are also of a relatively insignificant scale, having hovered between 200-300 throughout much of the last decade. However, after a period of stagnation, growth picked up considerably in 2019 and 2020, with annual growth of almost 30 per cent recorded in both years, with the number of students reaching 354 in 2020. The recent uptick in UAE international student enrolments in Canada may well be a reflection of Canada's rising popularity as a study destination for students from across the world due to its competitive tuition fees and expansive employment opportunities via its post-study work visa. However, even after the strong growth seen in the last couple of years, the absolute volume of students remains low.

Figure 9: UAE HE enrolments in Canada



Source: StatCan

According to UNESCO, the UAE hosted over 215,000 international students in 2019.²⁹ This translates to an inbound mobility rate of around 73 per cent and highlights the country's role as a regional international education hub, with the number of inbound students coming to the country to study many times greater than the number of outbound students. The leading origins of inbound students to the UAE are India, Oman, Jordan and Syria, with smaller shares coming from other countries in the MENA region, South Asia, Europe and North America. Most of the country's higher education providers are located in the emirates of Dubai and Abu Dhabi, which host large international student populations.

5.2 Transnational education and distance learning

The UAE is known to be a regional hub for TNE, taking different forms including international branch campuses, degree franchises, and hybrid partnerships between international and local providers. This not only reflects the presence of a large non-national student population and the country's strategic location, but also supportive government policy that has led to a favourable investment climate, state-of-the-art infrastructure, and straightforward visa policies. The UAE government has promoted TNE as a means of boosting the skills of the local population and developing the country into regional international education hub. The TNE market in the UAE is unsubsidised, rendering providers in direct competition with other private sector providers. The

²⁹ Statistics may include the children of migrant workers in the UAE or MENA region.

most popular subject areas provided through TNE in the UAE include business, engineering and computing programs.

The TNE landscape in the UAE primarily involves traditional delivery modes on physical campuses, as well as some online programmes.³⁰ The UAE has approximately 33 international branch campuses, mostly concentrated in dedicated free zones, such as Dubai Knowledge Village and Dubai International Academic City, which were created to allow foreign institutions to set up wholly owned branches. Abu Dhabi has also partnered with several prestigious foreign institutions, including New York University, and the Sorbonne, in Paris, both of which have opened branch campuses there. TNE branches differ in size significantly and while some have large campuses with multiple schools, others operate in limited and shared premises.

TNE providers in free zones are exempt from national accreditation and are alternatively licensed by emirate-level regulatory authorities, which ensure that the quality and scope of each degree program offered is comparable to that of the providers home campus. This however makes TNE providers in free zones less attractive to Emirati citizens, who seek nationally accredited degrees to be eligible to apply for local public sector jobs or higher studies in local HEIs. In 2011, the emirate of Dubai amended its legal framework to allow the recognition of non-nationally accredited TNE degrees in the local government institutions within the Emirate. However, those degrees are still not recognised in other emirates. Accordingly, TNE providers have been increasingly seeking national accreditation to attract more Emirati and expatriate students and to be eligible to offer training and consultancy services to government entities.

UK institutions are leading providers of TNE within the UAE, with 16,350 TNE and distance learning enrolments recorded in the 2020/21 academic year (excluding Oxford Brooks students) and a broadly even split between undergraduate and postgraduate provision according to HESA data. The UAE is the UK's largest TNE market in the Middle East region, marginally ahead of Oman and Saudi Arabia, and is one of the UK's top ten TNE markets globally.

UK TNE provision in the UAE is facilitated through approximately nine well established providers and several smaller campuses, franchised programmes, and partnerships with local providers across the country leading to joint degrees. This comprises a range of large, undergraduate and postgraduate serving campuses, postgraduate only business schools, smaller degree franchises, online providers and degree validation partnerships with local institutions. Dubai is home to the largest and most well-established institutions. The UAE TNE market also consists of several smaller or recently established campuses or franchises such as those of Birmingham City University, University of West London, Bath Spa University and Cardiff Metropolitan University.³¹

³⁰ Transnational Graduate Outcomes, A Case Study of the United Arab Emirates, *Universities UK International*, 2021, www.universitiesuk.ac.uk/sites/default/files/field/downloads/2021-10/Transnational%20Graduate%20Outcomes%20A%20case%20study%20of%20the%20United%20Arab%20Emirates.pdf

³¹ Review of UK Transnational Education in United Arab Emirates: Overview, *Quality Assurance Agency for Higher Education (QAA)*, 2014, www.qaa.ac.uk/docs/qaa/international/review-transnational-education-uae-14.pdf

6 UK Cooperation

The UK and the UAE share deep and historic relations that have been reframed under the newly established Partnership for the Future, which was announced in September 2021 and led by the UK Prime Minister and His Highness the Crown Prince of Abu Dhabi.³² The Partnership is centred around two pillars, namely sustainable prosperity and global issues. Under the sustainable prosperity pillar, the Partnership will create new trade, investment and innovation dynamics, and will strengthen collaboration in areas including life sciences, energy innovation, regional issues, illicit finance, education, security, development, culture, climate, and health and food security. Meanwhile, the global issues pillar outlines mutual cooperation on climate, health, development, culture and education, and illicit finance.

Under the education component of the Partnership, the agreement focuses on exploring future opportunities to collaborate in technical and vocational training, which will contribute to the knowledge economy of both countries. Female education also ranked high on the agenda with both countries committing to build on their partnership for ensuring 12 years of quality education for all girls, and to use diplomatic and development levers to support global implementation of the landmark joint UN Human Rights Council resolution on girls' education.

In addition, through the British Council, the UK sponsors a number of educational programmes that aim to support the UAE government in enhancing its national education system and raising the capacity of its educational institutions. This includes the Internationalising Higher Education programme that links the MoE with partners in the UK, government and universities to build capacity in UAE universities to develop expertise in the areas of quality assurance, academic research, employability and career development, and leadership and management.³³

³² United Kingdom – United Arab Emirates Joint Communiqué: a Partnership for the Future, *UK Government*, 2021, www.gov.uk/government/news/united-kingdom-united-arab-emirates-joint-communication-a-partnership-for-the-future#:~:text=Government%20leaders%20also%20announced%20the,conducted%20in%202021%20and%20beyond.

³³ Internationalising Higher Education, *British Council*, 2022, www.britishcouncil.ae/en/programmes/education/internationalising-higher-education