

Market Intelligence Brief

Qatar

March 2024



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1 Executive Summary

Located on the west coast of the Arabian Gulf, Qatar is a small yet highly prosperous country and has tremendous influence as a trusted mediator between rival countries in the Middle East region. At around 3m, its population is supported by a large, predominantly male, migrant workforce, with 'non-Qataris' representing around 90 per cent of the country's total population.

Qatar has one of the highest levels of GDP per capita in the world, with its economic prosperity derived from the extraction and export of oil and gas. Given the country's reliance on oil and gas export revenues, Qatar has an ambitious and long-term development plan under the National Vision 2030 to diversify its economy, with infrastructure spending related to transport, education, sports, healthcare, telecommunications and hospitality being prioritised. Healthy and stable economic growth throughout most of the last decade, including through periods of weaker oil prices, is a demonstration that the strategy of economic diversification is already proving successful.

Backed by significant levels of government investment, the domestic education system in Qatar has had to expand rapidly over the last two decades to keep pace with its fast-growing population. According to data from UNESCO, primary and secondary level enrolments have almost tripled compared to the levels seen in 2000, with 166,000 and 135,000 enrolments recorded at the primary and secondary levels respectively in 2022. At the tertiary level, the expansion has been even more significant, with enrolments increasing by a multiple of more than 5, from around 8,000 in 2000 to 44,000 in 2022. Higher education provision in Qatar is via a range of public and private higher education institutions (HEIs), as well as through 8 international branch campuses of foreign universities, located within Education City.

According to estimates from UNESCO, around 8,000 Qatari students travelled abroad to study at the higher education level in 2021. While this represents a relatively small number of students in volume terms, Qatar's outbound mobility ratio stood at 19 per cent in 2021, meaning that the propensity to study abroad of Qatari students is amongst the highest in the world. This reflects limited capacity in Qatar's higher education system domestically and the wide availability of study funding sources, together with high levels of disposable income among the native Qatari population.

Looking at the UK's recruitment of Qatar-domiciled international students over the last decade, there was strong growth in the volume of inbound students both at the undergraduate and postgraduate levels in the early 2010s. More recently the total number of inbound students has stabilised at around the 3,000 mark over the last few years, with a drop in the number of Qatari citizens studying in the UK but continued growth in Qatar-domiciled expatriates, who now make up around 40 per cent of the total. Nonetheless, the UK remains the most popular international study destination for Qatari students, well ahead of the US, Canada and Australia.

Qatar is relatively active as a transnational education (TNE) host country and has pursued an active policy of engagement with foreign universities, inviting several prestigious institutions to establish branches in Education City with significant financial backing provided by the Qatari government. The US dominates in terms of international branch campuses with several different

institutions operating campuses in Qatar. The UK HEI with the largest footprint in the Qatari TNE market is the University of Aberdeen. Opening its doors in 2017 in a private venture undertaken with a local partner, AFG College, it became the first British university at a dedicated campus offering undergraduate and postgraduate degrees within Qatar. According to HESA, the University of Aberdeen had 1,055 TNE enrolments from Qatari students in 2021/22, representing roughly one third of total Qatari TNE and distance learning enrolments at UK HEIs.

2 Introduction

This report was produced by the British Council's Middle East and North Africa (MENA) Education Insight Hub, 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 Qatari 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 Qatar's 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 Qatar's education system – including student mobility, transnational education programmes and research collaboration – and highlights national-level education projects and partnerships between the UK and Qatar.

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 Qatar.

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Comments, queries and suggestions in relation to this report are welcome and may be submitted to **Nesma Mostafa, Head of MENA Higher Education Insights and Student Mobility**, by email to nesma.mostafa@britishcouncil.org

^[1] www.oxfordeconomics.com/

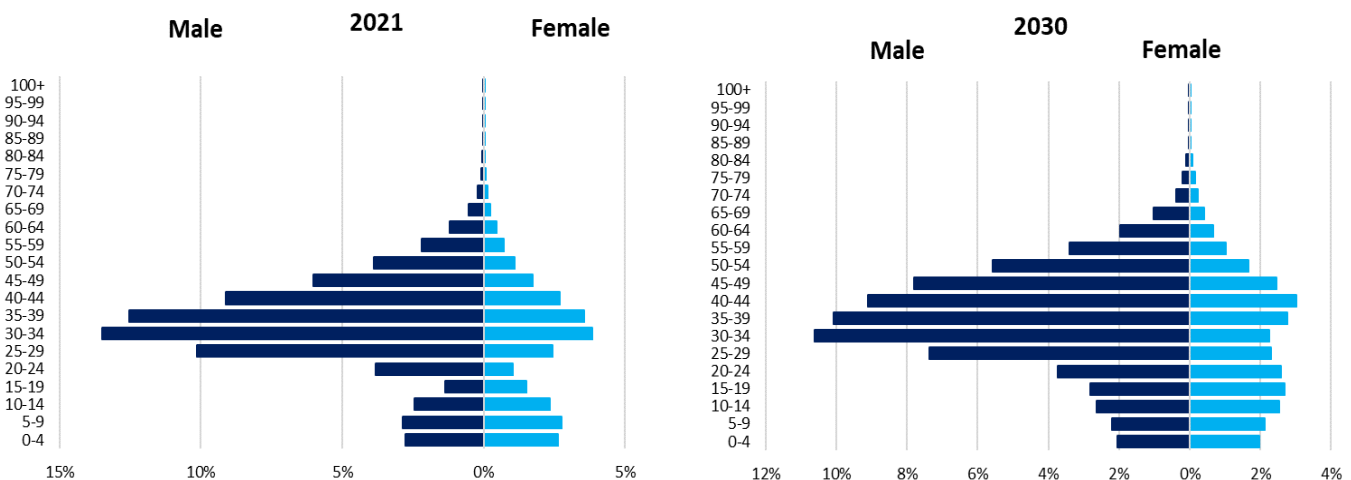
3 Macro Environment

3.1 People

Located on the Arabian Gulf and with a population of around 3m, Qatar is one of the smaller Middle Eastern countries, only ahead of Bahrain (1.5m) in population terms.¹ Its population is supported by a large, predominantly male, migrant workforce, with ‘non-Qataris’ representing around 90 per cent of the country’s population. As such, migration trends are the main driver of overall population trends in the country. According to the UN, Qatar’s population is projected to grow robustly over the coming years, increasing to 2.9m by 2030 and rising further to around 3.4m by 2050.

The age profile of the Qatari population is skewed by the large volume of working-age male migrants, with Indians, Bangladeshis, Nepalese, Filipinos, and Egyptians among the largest groups. In 2021, around 83 per cent of the population were aged 15-64, with 16 per cent in the 0-14 age group and only 1 per cent aged over 65. Looking ahead to 2030, the 0-14 share is expected to decline marginally to around 14 per cent, with the over 65 share rising to around 3 per cent and the working age share remaining at around 83 per cent.

Figure 1: Qatar’s population pyramid, 2021 and 2030



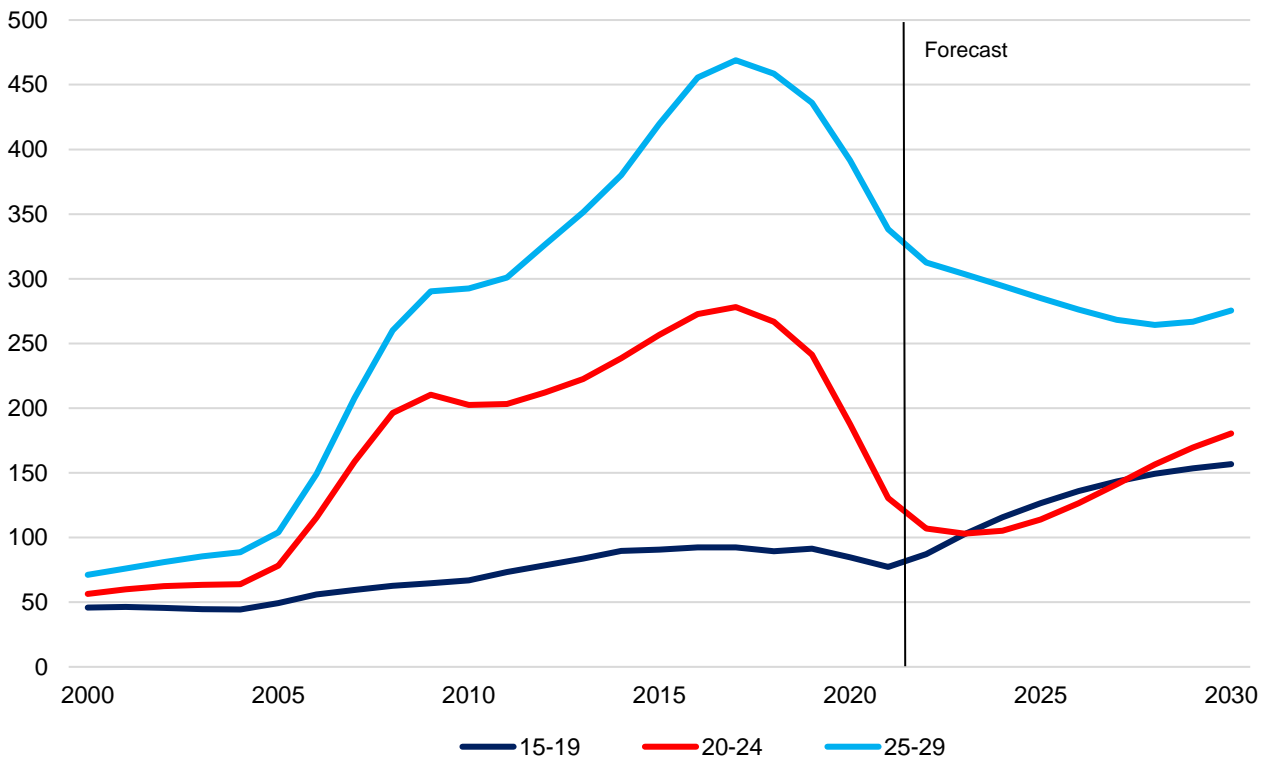
Source: UN Population Division

Looking specifically at the population age bands of interest to UK HEIs, these have shown diverging trends over the last two decades. The population in the 15-19 age band has generally been on an upward trajectory, increasing from around 46,000 in 2000 to around 87,000 at present. In the 20-24 age band, population growth has fluctuated over the period, starting at around 56,000 in 2000 and growing strongly to peak at 278,000 in 2017, before falling sharply down to just over 100,000 at present. The evolution of the 25-29 age band has been similar,

¹ World Population Prospects, United Nations Population Division, 2022, www.population.un.org/wpp/

growing strongly from around 71,000 in 2000 to peak at almost 470,000 in 2017, before falling back to around 310,000 at present. A large part of the decline in the 20-29 age band over recent years is likely to have been related to the pandemic and Qatar's stringent lockdowns and border policy, with many from the younger working cohorts deciding to return to their home countries during this period. Looking ahead, and taking the 15-29 age group in aggregate, population growth is expected to stabilise, rising from just over 500,000 at present to around 610,000 by the end of the decade.

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



Source: UN Population Division

Qatar is an urbanised state, with just under half of the country's population living in the capital city of Doha, which had a population of around 1.2m in 2020 according to the census. Al Rayyan (0.8m) and Al Wakra (0.3m) are the next most densely populated municipalities in the country.²

Islam is the official religion in Qatar, and most Qatari nationals are Sunni Muslim. However, the large immigrant population means other major religions, including Hinduism, Christianity and Buddhism, are prominent among the non-national population. Arabic is the official language, although English is commonly used as a second language and migrants have brought a range of other languages to the country such as Urdu, Tagalog, Hindi and Malayalam.³

² Qatar Census 2020, *Planning and Statistics Authority*, 2020, www.psa.gov.qa/en/statistics/Statistical%20Releases/General/Census/Census_2020_Res_Summary_En.pdf
³ Qatar, *CIA World Factbook*, 2024, www.cia.gov/the-world-factbook/countries/qatar/#people-and-society

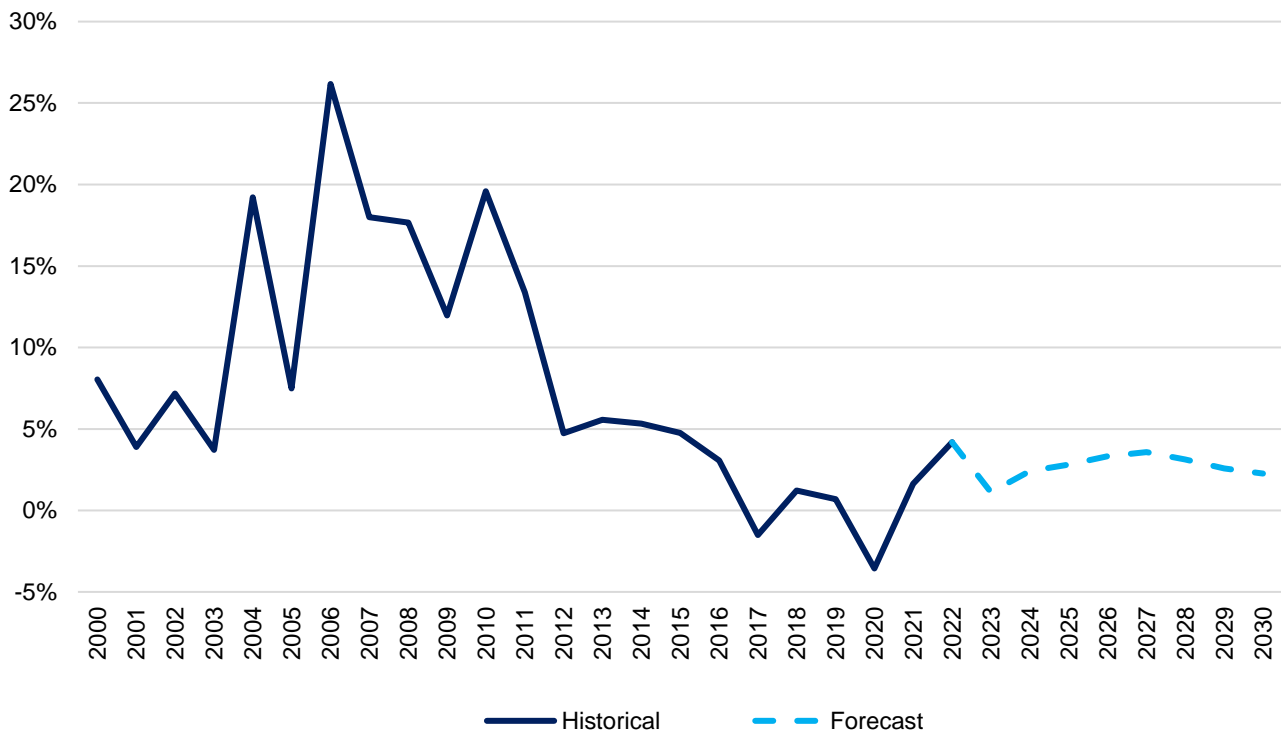
3.2 Economy

Since becoming a fully independent sovereign state in 1971, Qatar has transformed itself rapidly due to the discovery of oil and more recently through heavy investment in liquefied natural gas (LNG). In GDP per capita terms, it is one of the wealthiest countries in the world and has one of the most advanced and extensive welfare and free education systems in the Gulf.

While oil production capacity has continued to increase in the country, it was investment in two LNG projects that changed the country's fortunes, backed by the largest non-associated gas field in the world and the second-highest proven gas reserves in the Middle East, after Iran. Qatar is now one of the world's leading LNG exporters, alongside the US and Australia, with oil and gas export revenues underpinning the country's economic prosperity.

However, given the country's reliance on oil and gas export revenues, Qatar has an ambitious and long-term development plan under the National Vision 2030 to diversify its economy, with infrastructure spending related to transport, education, sports, healthcare, telecommunications and hospitality being prioritised. Healthy and stable economic growth throughout most of the last decade, including through periods of weaker oil prices, is a demonstration that the strategy of economic diversification is already proving successful.

Figure 3: Qatar's real GDP growth



Source: Haver Analytics / Oxford Economics

In common with most other economies around the world, the Qatari economy contracted in 2020 during the pandemic, with GDP declining by 3.6 per cent on an annual basis. However, growth resumed in 2021 with a moderate rise of 1.6 per cent, before stronger growth of 4.2 per cent in 2022, with both GDP and employment rising above pre-pandemic levels during the year. Economic growth is expected to have been around 1.1 per cent in 2023, with the temporary boost from the 2022 FIFA World Cup fading away. Oxford Economics expects growth to pick-up again in 2024, with growth of around 2.4 per cent expected, supported by expectations of stronger expansions in both the energy and non-energy sectors than in 2023. In the medium term, growth is expected to average around 3 per cent per year with continued investment in economic diversification boosting the non-energy economy.

In 2022, Qatar's GDP per capita stood at around US\$82,000 (in nominal terms), which was one of the highest in the world and well ahead of Middle Eastern peers including the UAE (US\$54,000) and Saudi Arabia, (US\$30,000). By 2030, Qatar's GDP per capita is projected to rise to approximately US\$103,000, which should underpin a continued expansion of middle- and high-income households. At present in Qatar there are around 560,000 households with an income above US\$35,000 per year, which is expected to rise to almost 600,000 by 2030.

The Qatari riyal is pegged to the US dollar at a rate of 3.64 per dollar. This means that the value of the riyal is fixed to the value of the dollar, which provides stability and predictability for businesses and investors. This fixed exchange rate also helps to promote international trade and investment, as it eliminates the risk of currency fluctuations. The Qatar Central Bank has built up significant foreign reserves, which act as a buffer against external shocks. These reserves enable the country to maintain the fixed exchange rate, even in times of economic uncertainty or volatility in global financial markets. Furthermore, the exchange rate peg facilitates a relatively stable international purchasing power of the riyal abroad, which in turn makes for a predictable cost of living and tuition for Qatari international students at foreign countries.

3.3 Government and education policy

A constitutional emirate with one advisory body, Qatar is ruled by a hereditary emir from the Āl Thānī. Members of the ruling family hold almost all the major ministerial posts, which are appointed by the emir.

The emir's power is constrained by the need to maintain the support of important family members, many of whom occupy high governmental posts. The homogeneity of the ruling family and the country's wealth contribute to Qatar's political stability. The emir has also cautiously expanded political participation, allowing the first elections to take place in 1999 and the first parliamentary election in 2021, with an electorate that included both female and male Qatari's.

Early childhood schools are governed by the Ministry of Administration Development, Labour and Social Affairs (MADLSA), while the Ministry of Education and Higher Education (MEHE) manages and supervises pre-primary to tertiary education. MEHE licenses and gives approvals

for opening new schools or educational service centres as well as HEIs. It also regulates education policy and plays a vital role in the development and execution of education reforms in Qatar.⁴

⁴ Education Sector in Qatar, *Qatar Development Bank*, 2021, www.qdb.qa/-/media/qdbapp/Other-Documents/Education-Sector-in-Qatar-Current-State-Assessment-Series.ashx

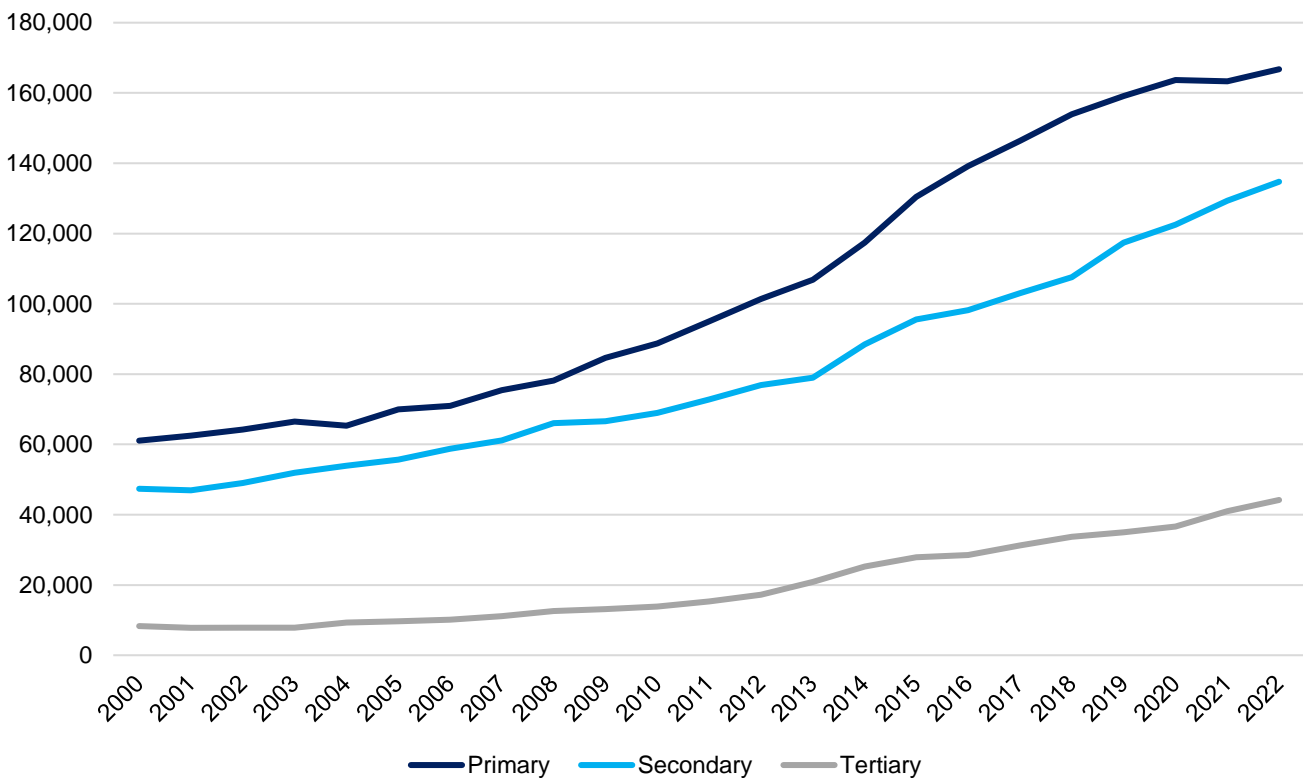
4 Domestic Education Environment

4.1 Overview

The MEHE oversees Qatar’s education system, which is accessible through state-run, independent, and private Arabic and international institutions. The education system of Qatar consists of a 6-year primary cycle followed by 3 years of lower-secondary (preparatory) and a 3-year upper-secondary cycle. Upon completion of the upper-secondary cycle, students have the option of either pursuing higher education, or to enter the labour market. Primary and lower-secondary school education in Qatar is compulsory for everyone and is free of charge at public schools.

Backed by significant levels of government investment, the domestic education system in Qatar has had to expand rapidly over the last two decades to keep pace with its fast-growing population. According to data from UNESCO, primary and secondary level enrolments have almost tripled compared to the levels seen in 2000, with 167,000 and 135,000 enrolments recorded at the primary and secondary levels respectively in 2022. At the tertiary level, the expansion has been even more significant, with enrolments increasing by a multiple of more than 5, from around 8,000 in 2000 to 44,000 in 2022.

Figure 4: Qatari enrolments by education level



Source: UNESCO

According to the latest PISA results from 2018, Qatar performed below the OECD average in reading, mathematics and science with scores of 407, 414 and 419 against the OECD average of 487, 489 and 489 respectively. Performance improved only slightly from the 2015 PISA, but the general trend since 2006 has been upwards, with mathematics scores improving at one of the fastest rates among participant countries.⁵

4.2 Early years, primary, secondary

The MEHE in Qatar has developed an integrated curriculum for early education. It includes kindergarten and the first and second grades, where students range between 4 and 6 years of age. This curriculum deviates from the traditional methods of early education that rely on textbooks and study materials. Rather, it focuses on forming the personality of children as active, creative participants who can actively participate in the world around them. The curriculum includes:

- Physical development, including movement and motor skills
- Exploration, including science and mathematics
- Identity formation and self-control, including Islamic and social studies
- Communication in both Arabic and English
- Creative expression, including art, theatre, music and movement⁶

According to the Qatari Planning and Statistics Authority, there were just over 49,000 students enrolled in pre-primary education in Qatar in the 2020/21 academic year, across 494 schools. Over 80 per cent of pre-primary students attended private schools, which underscores the central role that private schools play in education provision in Qatar, particularly at the earlier levels of education.⁷

Primary education in Qatar is for children aged 6 to 12 and is offered by both public and private schools. The public schools in Qatar follow the Qatari educational curriculum, while the private schools follow curricula to fulfil the needs of the expatriate communities living in the country. Primary schools with the British curriculum are the most popular, followed by Indian and American curriculum schools. Students who complete this level of education are eligible to enrol in the lower-secondary (preparatory) educational level. In the 2020/21 academic year, there were 313 primary schools in the country, with around 64 per cent of students enrolled at private institutions.

Secondary education is divided into lower-secondary (preparatory) level and upper-secondary level. The preparatory level is for a duration of three years, from age 13 to 15. Upon completion of the general preparatory stage, students can attend upper-secondary schools for a further

⁵ PISA 2018 Results, *OECD*, 2018, www.oecd.org/pisa/publications/pisa-2018-results.htm

⁶ Early Child Education, *MEHE Qatar*, 2024, www.edu.gov.qa/en/Pages/pubschoolsdefault.aspx

⁷ Annual Statistical Abstract, *Planning and Statistics Authority*, 2022,

www.psa.gov.qa/en/statistics/Statistical%20Releases/General/StatisticalAbstract/2021/Education_Chapter_4_2021_AE.pdf

three years, up until the age of 18. This stage of education in Qatar has two main streams, which are the academic (general) stream for students wishing to attend university, and the vocational/technical stream for students wishing to enter the labour market. In the 2020/21 academic year, there were 375 lower and upper-secondary schools in the country, with a roughly equal split between students attending private and government-run schools.

4.3 Technical & vocational education and training

The TVET system in Qatar is governed largely by the MEHE, given its responsibility for directing the nation's education policy and education reform efforts. Linked to this, in 2018, a TVET Committee was formed within the MEHE with the aim of developing and implementing a formal TVET policy in the country. In January 2019, the TVET Committee officially became the Office of TVET within the MEHE.⁸

The need for more effective TVET systems in Qatar has been on the agenda for decades, with its rapid industrialisation creating the need for highly skilled technical workers, particularly in the oil and gas sector and related industries. Beginning in the late 1990s, Qatar launched a comprehensive set of education reforms to more effectively align its education and training system with its macroeconomic policies aimed at advancing towards a knowledge-based economy. However, TVET has not been a significant focus of educational reforms.⁹

According to UNESCO's two Global Education Monitoring reports (2016 and 2020), Qatar is among the weakest performers globally in terms of TVET uptake, with less than 1 per cent of secondary school students enrolled in vocational schools. Contributing to this is a lack of clarity of the value of TVET by students and parents and a lack of vocational and practical topics across the curriculums in primary and preparatory schools. Furthermore, there is a low-standing image of some occupations that TVET serves.¹⁰

Despite the challenges, the Qatari government remains committed to developing and improving the country's TVET sector. Encouragingly, Qatar Technical Secondary School for Girls was recently launched. It is the first technical and vocational school for girls in the country and represents an important step in addressing the gender imbalance that exists within the country's TVET sector. In another recent positive development for the sector, Qatar Council of Ministers approved the adoption of the National Qualifications Framework presented by the MEHE, as a mandatory reference tool, to identify, classify and organise national academic and professional qualifications according to the level of learning and allow mobility between all paths of education and between education sectors and labour market. TVET is at the core of this framework.

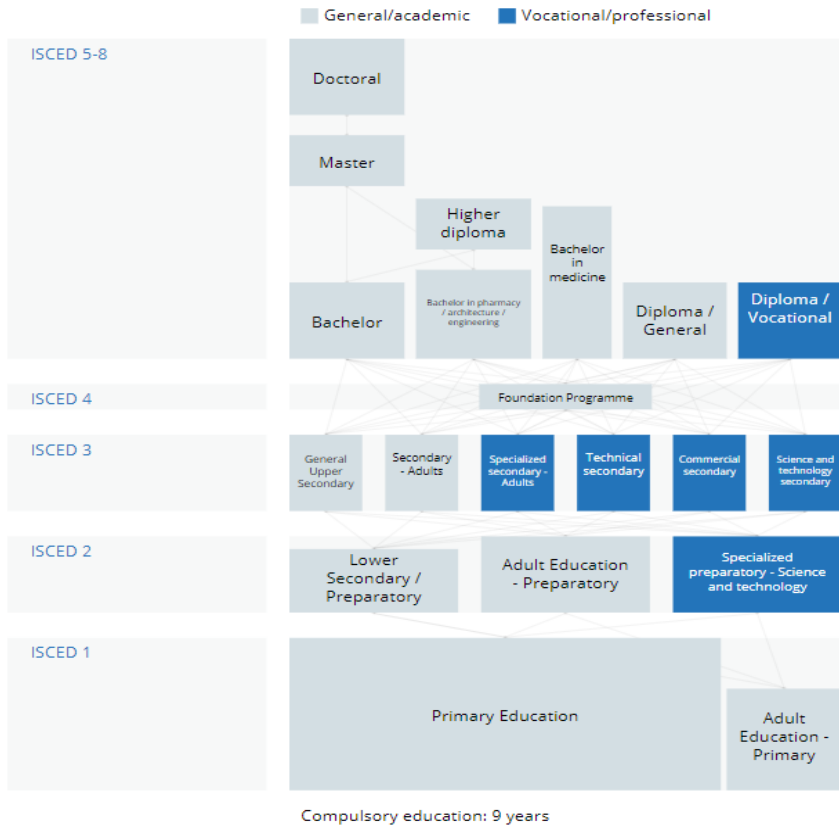
⁸ TVET Country Profile: Qatar, *UNESCO*, 2024,

www.unevoc.unesco.org/home/Dynamic+TVET+Country+Profiles/country=QAT

⁹ Why Qatar Needs a New TVET Strategy Now, *Tahseen Consulting*, 2024, www.tahseen.ae/insights/why-qatar-needs-a-new-tvet-strategy-now/

¹⁰ A Brighter TVET Future for Qatar: Addressing Current Challenges, *UDST*, 2022, www.udst.edu.qa/about-udst/media/news/brighter-tvet-future-qatar-addressing-current-challenges

Figure 5: TVET in the Qatari education system



Source: UNESCO (school reference year: 2020)

4.4 Higher education

Higher education in Qatar is offered by 31 institutions, which includes 8 public HEIs, 5 military HEIs, 8 international branch campuses and 10 private sector HEIs. The number of HEIs has more than doubled in the last decade, up from 16 in 2014. The number of students enrolled in these institutions reached around 44,000 in the 2021/22 academic year, with both the number of student enrolments and the number of HEIs increasing significantly over the last decade.¹¹ Access to higher education is via the Qatar Senior Schooling Certificate (QSSC) or equivalent exams from international or independent schools.

Qatar University is the country’s national university, and it plays a central role in the higher education sector, offering a diverse range of programmes that continues to expand to accommodate the growing demand for higher education in the country. It is the country’s top-ranking HEI, placing in the top 300 of the 2024 THE World University Rankings (251-300).¹²

One of the most notable initiatives within Qatar’s higher education sector in recent times has been the development of Education City in Al Rayyan. Developed by the Qatar Foundation, the

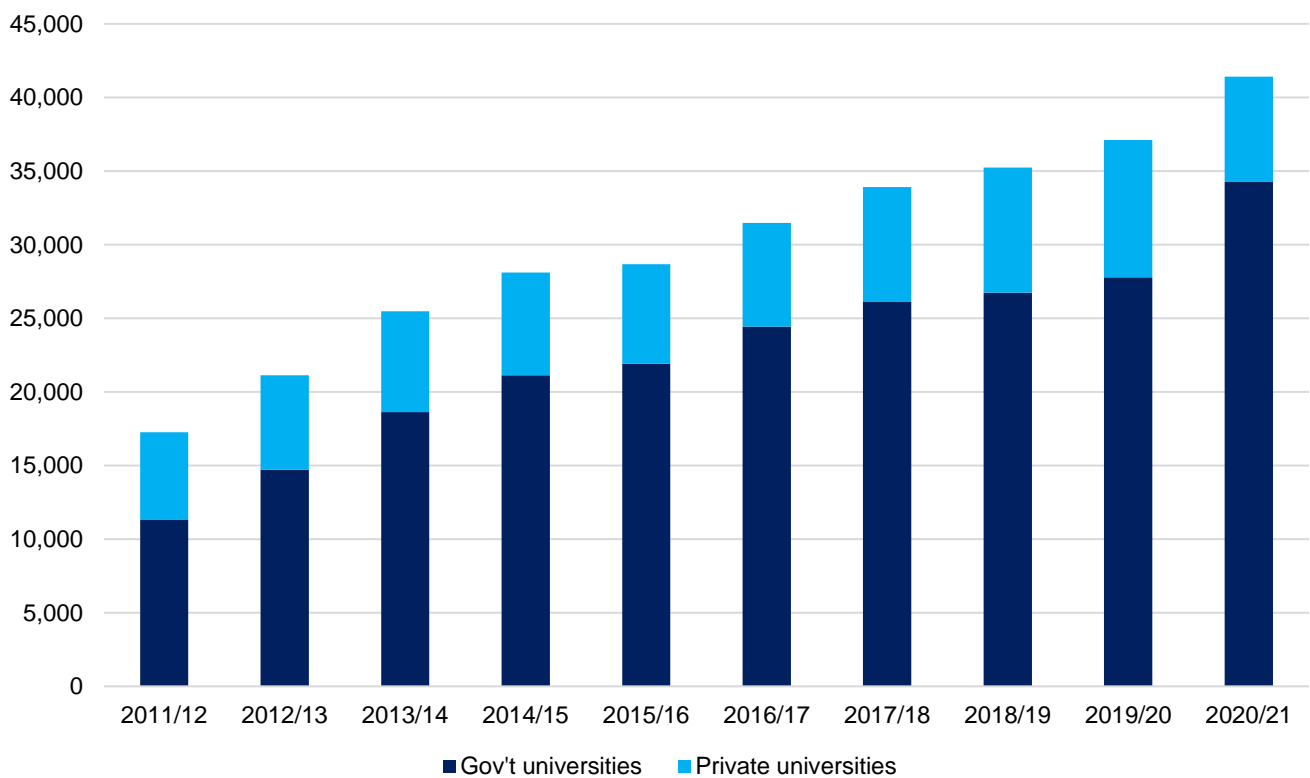
¹¹ Higher Education in Qatar, MEHE, 2024, www.edu.gov.qa/en/Pages/higheredudefault.aspx?ItemID=58

¹² World University Rankings, THE, 2024, www.timeshighereducation.com/world-university-rankings

city was officially inaugurated in 2003 and houses various education facilities, including the 8 international branch campuses currently operating in the country. After 20 years of development, the city is now a fully-fledged community, with a wide range of accommodation and recreational facilities to complement the education offering.

In contrast to the Qatari schooling system, the vast majority of higher education provision is via government universities. Specifically, around three quarters of university students were enrolled in government universities over the last decade. Furthermore, female participation in higher education is much higher than male participation, with female students accounting for around two thirds of university enrolments in Qatar over the last decade.

Figure 6: Qatari domestic higher education enrolments



Source: Qatari Planning and Statistics Authority

5 International Education

5.1 Student mobility

According to estimates from UNESCO, around 8,000 Qatari students travelled abroad to study at the higher education level in 2021. While this represents a relatively small number of students in volume terms, Qatar's outbound mobility ratio stood at 19 per cent in 2021, meaning that the propensity to study abroad of students from Qatar is amongst the highest in the world. This reflects limited capacity in Qatar's higher education system domestically and the wide availability of study funding sources, together with high levels of disposable income among the native Qatari population. UNESCO's data shows that the UK is the top destination for Qatari students abroad, followed by Jordan and the US; other major destination countries include India, Saudi Arabia and Morocco.

The volume of outbound international students from Qatar has been on a generally consistent upward trajectory throughout the last two decades, rising from around 1,200 in 2000, to 2,900 by 2010 and to around the 8,000 mark in recent years. However, there have been declines over the last three years from a peak of 9,000 in 2018, with the declines in 2020 and 2021 likely due to international travel restrictions due to the pandemic.

Looking at the UK's recruitment of Qatar-domiciled international students over the last decade, there was strong growth in the volume of inbound students both at the undergraduate and postgraduate levels in the early 2010s, with the total number of inbound students stabilising at around the 3,000 mark over the last few years. However, although total student mobility has stayed relatively constant, the number of Qatari citizens studying in the UK has fallen in recent years, while there has been an increase in mobility from non-citizens living in the country. Around 60 per cent of Qatar-domiciled students in the UK in 2021/22 were Qatari citizens, down from 76 per cent in 2016/17.

A large proportion of students from Qatar are funded by scholarships, most of which are offered by the Qatari government and limited to Qatari citizens. Overall around 20 per cent of all Qatar-domiciled students studying in the UK, or 35 per cent of Qatari nationals, have government scholarships as their main funding source. If other overseas funding sources such as employers, HE providers and scholarships from industry and commercial entities are included, the relevant proportions of scholarship-funded students are 53 per cent of Qatari nationals and 2 per cent of non-citizens (33 per cent overall).

Regulations for scholarship-funded students are set by MEHE, with a list of eligible institutions updated every three years.¹³ At the bachelor's degree level, institutions should be within the top 600 universities in at least one of the Times Higher World University Ranking, QS World University Ranking or AWRU (Shanghai Ranking), or in the top 250 in the US News national ranking. Requirements for postgraduate courses are higher, with destination universities needing to be in the top 300 in one of the three international rankings. Students applying for a

¹³ List of Accredited Universities for Scholarships Inside and Outside the State of Qatar, *Ministry of Education and Higher Education Qatar*, accessed February 2024 <https://www.edu.gov.qa/ar/Deputy/HEaffairs/Pages/UnischolarshipeOut.aspx>

scholarship also need to abide to the list of majors pre-set by the Ministry in accordance with the Qatar's Civil Service and Governmental Development Bureau.¹⁴

Guidelines for the Qatar government's 2024/25 scholarship plan, announced in January 2024, increased the number of scholarship tracks from 3 to 8, covering more subject areas than the previous policy. Registration for this year's scholarships will be open from mid June to mid August 2024.¹⁵

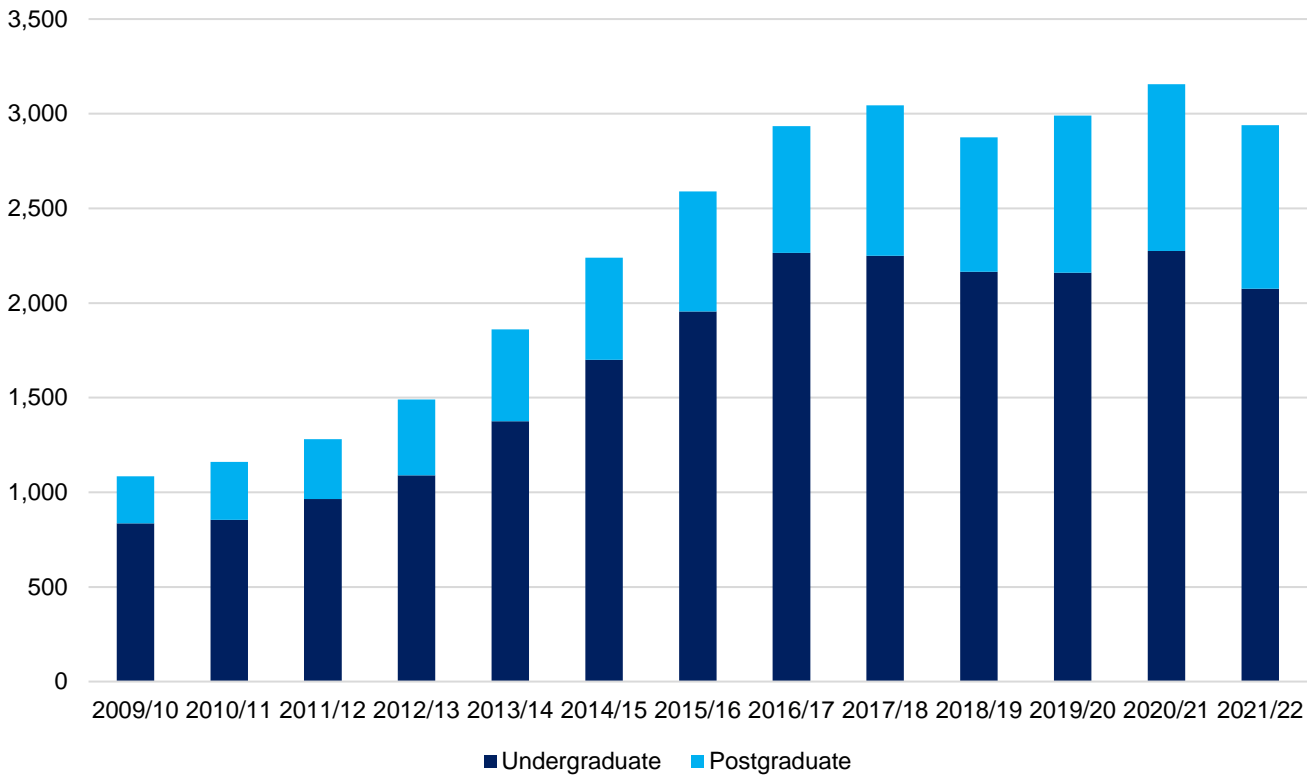
In addition to scholarship-funded students, the MEHE also sets criteria for self-funded students who wish their degree to be recognised in Qatar. These lists are set in a similar way to approved scholarship institutions, but with somewhat looser requirements – bachelor's degree students must be awarded by a university in the top 800 of international rankings, while postgraduate qualifications must be awarded by a top 600 ranked institution.

Over the last decade, Qatar has primarily been an undergraduate market for the UK, with roughly three quarters of Qatari international student enrolments being at undergraduate level during the period. Meanwhile, after having peaked at around 38 per cent in 2006/07, the share of Qatari international students studying at Russell Group institutions had been on a consistent decline for around a decade thereafter, falling to just 13 per cent by 2017/18. This reflected a change in Qatari MEHE policy, with a wider range of UK universities included on the list of approved institutions for government scholarship recipients at the undergraduate level. However, given the reversal of this policy in recent years and the reduction in the list of approved UK universities, the share of students studying at Russell Group institutions has begun to increase again and stood at 22 per cent in the 2021/22 academic year.

¹⁴ Available Majors for Scholarship According to the Plan of the Civil Service Bureau, *Ministry of Education and Higher Education Qatar*, accessed February 2024 <https://www.edu.gov.qa/en/Content/ScholarshipSpecializations>

¹⁵ General Guidelines for the scholarship plan for the academic year 2024/25, *Ministry of Education and Higher Education Qatar*, accessed March 2024 <https://scholarship.edu.gov.qa/home/index-en.html>

Figure 7: Qatari students in HE programmes in the UK

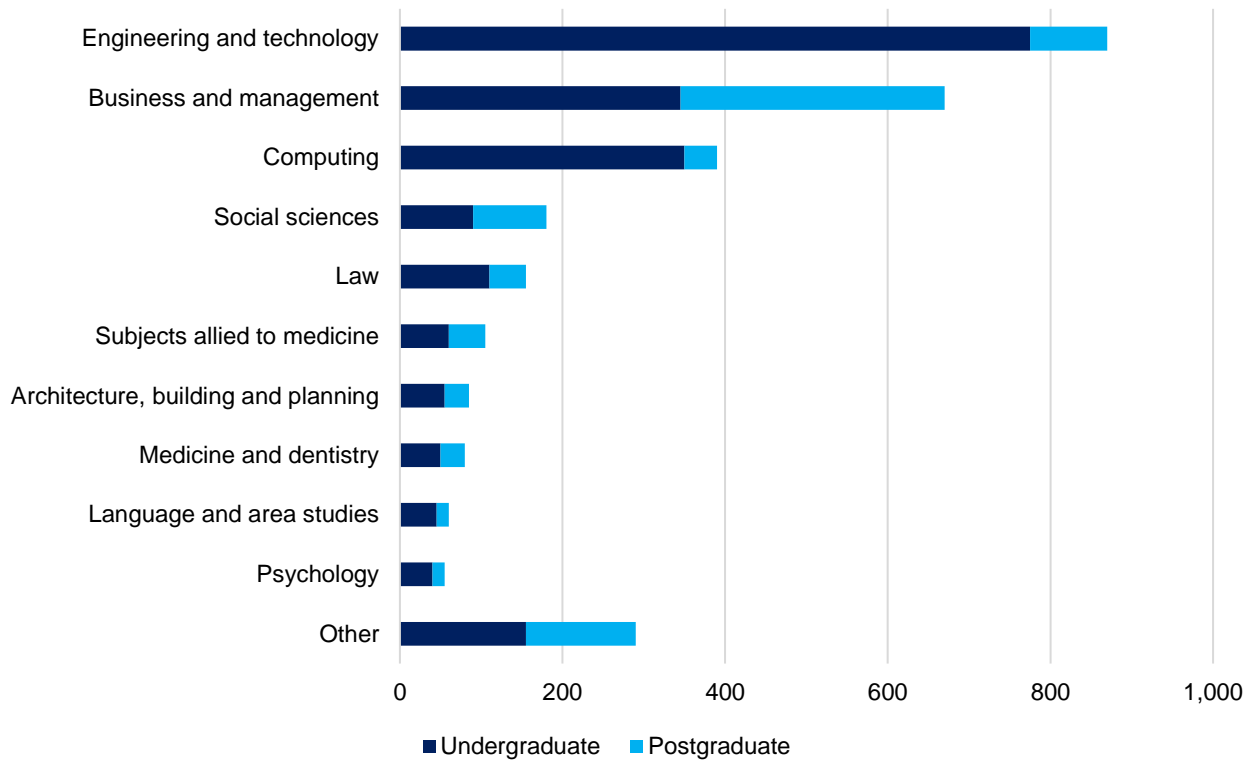


Source: HESA

In terms of subject area choices, engineering and technology was the most popular for undergraduates with 775 enrolments in 2021/22. The next most popular choices at undergraduate level were computing (350), business and management (345), law (110) and social sciences (90). At postgraduate level, the most popular subject choice was business and management with 325 in 2021/22, followed by engineering and technology (95), social sciences (90), subjects allied to medicine (45) and law (45).

Historically, the South East has been the most popular study region within the UK for Qatari students, accounting for around 20 per cent of total Qatari international student enrolments in 2021/22. The next most popular region for inbound Qatari students in 2021/22 was London (16 per cent), the North West (12 per cent) and Yorkshire and the Humber (12 per cent). At institutional level, the University of Portsmouth was the most popular choice for Qatari students in 2021/22 with 365 enrolments. The next most popular were the University of the West of England, Bristol (195), the University of Hull (150), Liverpool John Moores University (135) and University of Northumbria (105).

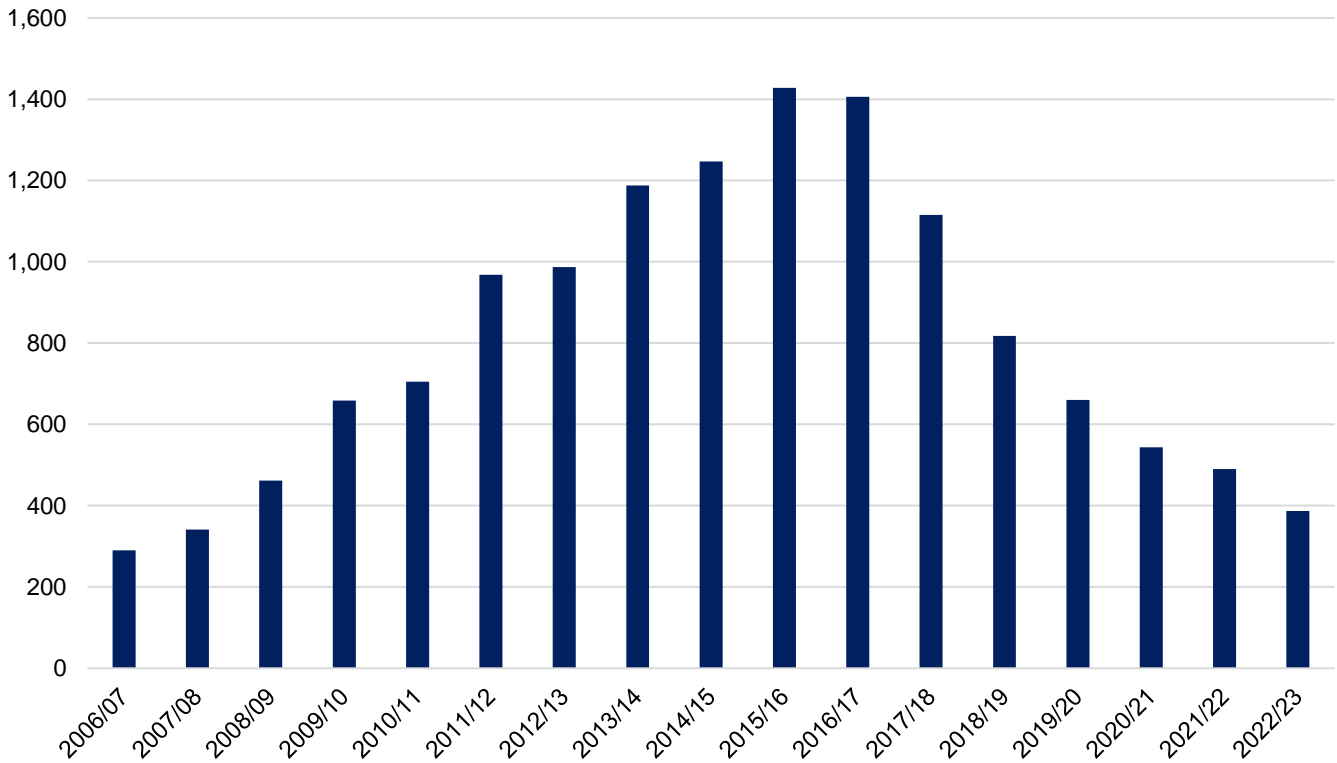
Figure 8: Subjects studied by Qatari HE students in the UK, 2021/22



Source: HESA

Although well behind the UK, the US is the second most popular English-speaking destination for students from Qatar. After a decade of consistent and steady growth, Qatari international student numbers in the US peaked at just above 1,400 in 2015/16. However, since then, there has been a consistent downward trajectory, with the volume of students declining every year since and falling to below 400 in the 2022/23 academic year. Much of the decline has been attributed to the “Trump effect”, an anti-migration climate, unfavourable political rhetoric and tightened restrictions on student visas.

Figure 9: Qatari HE enrolments in the US



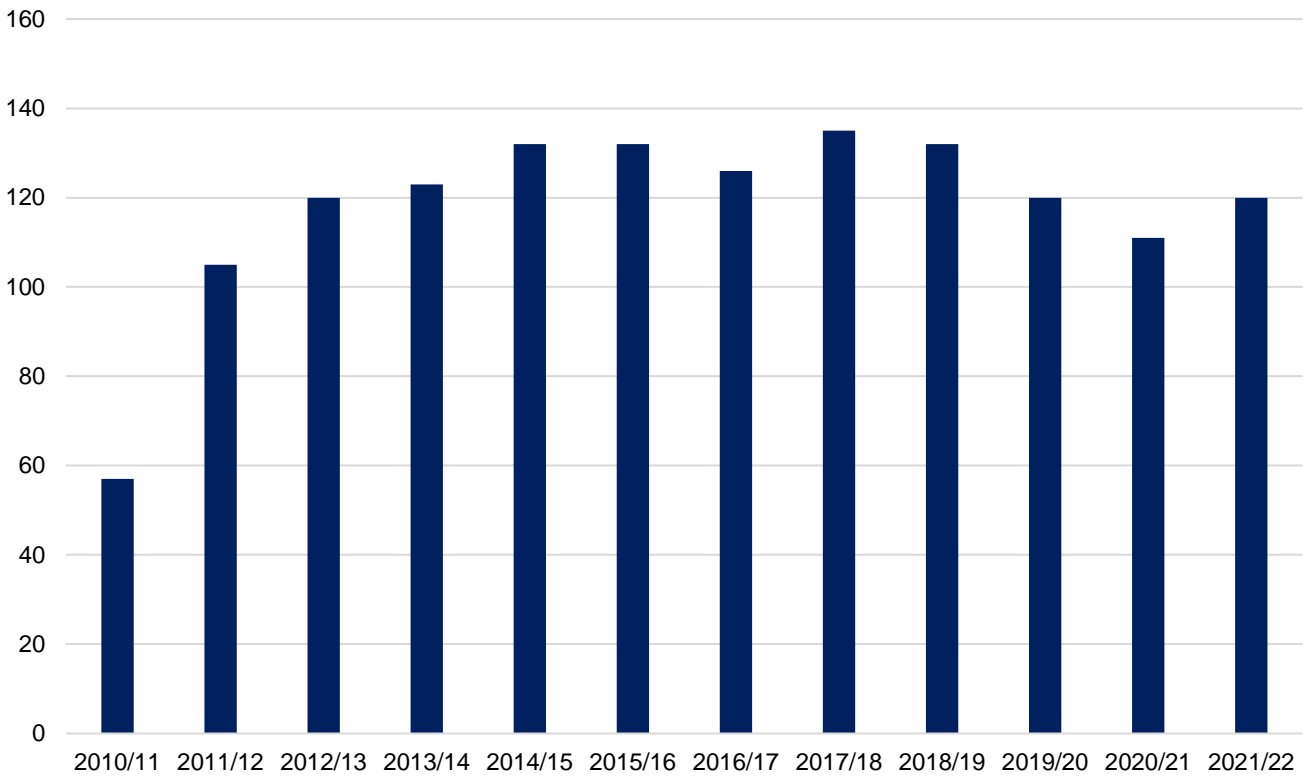
Source: IIE (Note: OPT students excluded).

The number of Qatari international students studying in Canada has averaged around the 120 mark throughout the last decade. Although Canada has gained significant market share in many different international student markets across the world over recent years due the Canadian government’s concerted efforts to attract more international students, little progress has been made in Qatar and Canada remains a less popular choice for Qatari students.

Australia is also not a major destination choice for Qatari international students, with just 12 enrolments in 2022 according to AusTrade data.

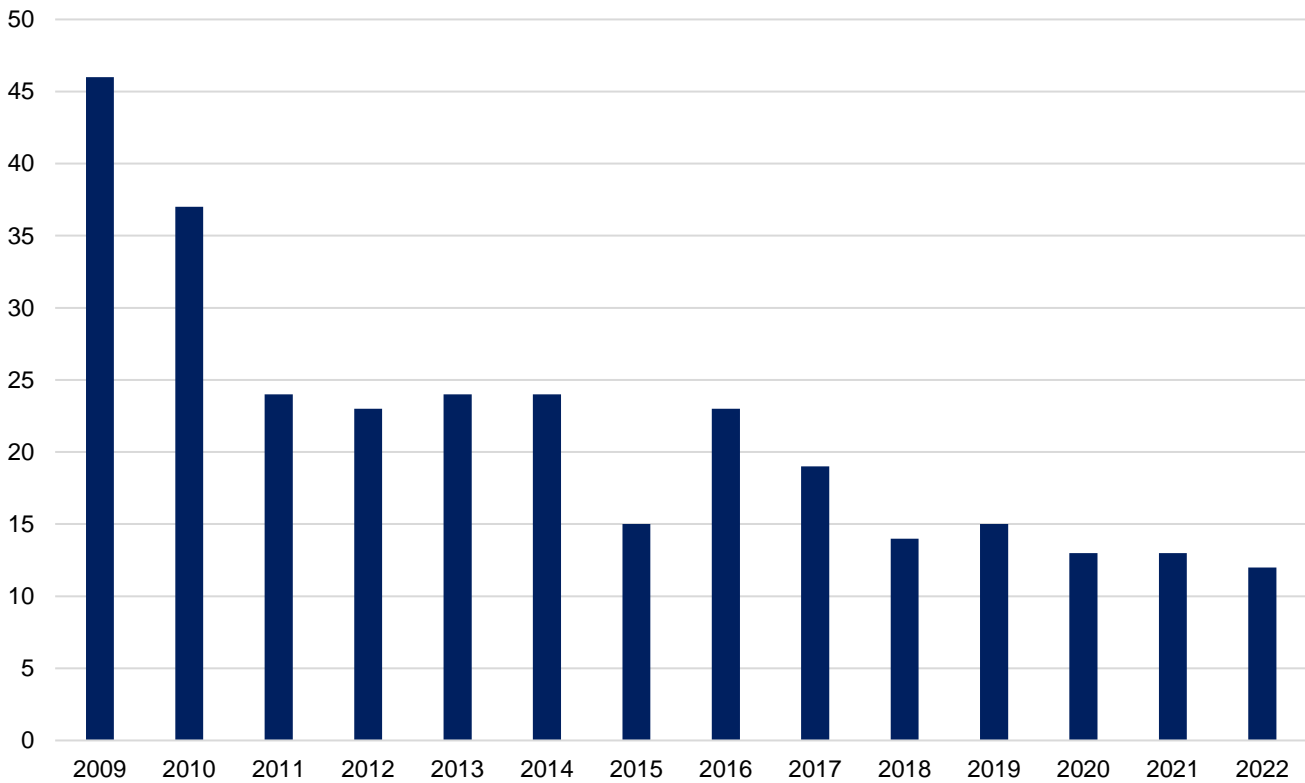


Figure 10: Qatari HE enrolments in Canada



Source: StatCan

Figure 11: Qatari HE enrolments in Australia



Source: AusTrade

A significant feature of Qatar's development over the past two decades has been its investment in education, with the country's leadership putting a special emphasis on building a knowledge economy. The Education City as well as Qatar University have been attracting an increasingly large number of international students over recent years, making Qatar an international education hub in the Middle East region. According to UNESCO data, Qatar hosted over 17,000 international students in 2022, with the majority of students coming from other countries in the region including Egypt, Yemen, Jordan and Palestine.¹⁶

5.2 Transnational education and distance learning

Qatar is relatively active as a TNE host country and has pursued an active policy of engagement with foreign universities, inviting several prestigious institutions to establish branches in Education City with significant financial backing provided by the Qatari government. US universities dominate in terms of branch campuses, with Carnegie Mellon University, Georgetown University, Northwestern University, Texas A&M University, Virginia Commonwealth University, and Weill Cornell Medicine Qatar all having a physical presence in the country.¹⁷ However, Texas A&M University announced in early 2024 that they would close their Qatar campus, with recruitment suspended and plans to cease operations by 2028 once current students have completed their courses.

According to HESA, there were 3,395 Qatar-domiciled students enrolled on UK TNE and distance learning courses in the 2021/22 academic year. This is the highest number of students since HESA records began and is the result of steady and consistent growth throughout the last decade. Around 1,260 of these students were studying on distance learning courses; this number has remained relatively constant in recent years while almost all growth has come from other modes of study. Historically, the majority of provision was at the postgraduate level. However, the gap between undergraduate provision and postgraduate provision has been closing rapidly over the last five years and in the 2021/22 academic year, the number of undergraduate enrolments (1,635) almost matched the number of postgraduate enrolments (1,760).

The UK HEI with the largest footprint in the Qatari TNE market is the University of Aberdeen. Opening its doors in 2017 in a private venture undertaken with a local partner, AFG College, it became the first British university at a dedicated campus offering undergraduate and postgraduate degrees within Qatar.¹⁸ According to HESA, the University of Aberdeen had 1,055 TNE enrolments from Qatari students in 2021/22, representing roughly one third of total Qatari TNE and distance learning enrolments at UK HEIs – or almost half if distance learning students are excluded. Other UK HEIs with significant numbers of Qatari TNE and distance learning enrolments include the University of Northumbria (400), Liverpool John Moore's University (355), the University of Central Lancashire (180) and the University of Derby (145).

¹⁶ Global Flow of Tertiary-Level Students, *UNESCO*, 2024, www.uis.unesco.org/en/uis-student-flow

¹⁷ International Campuses, *C-BERT*, 2024, www.cberrt.org/intl-campus

¹⁸ AFG College With The University of Aberdeen, *University of Aberdeen*, 2024, www.abdn.ac.uk/qatar/index.php

6 UK Cooperation

In June 2022, the governments of Qatar and the UK signed a memorandum of understanding (MoU) on enhancing bilateral relations between both countries in the education sector and increasing understanding and knowledge exchange between the two states through expanding educational partnerships. The signing of the MoU came as an affirmation of the two governments' desire to promote and develop cooperation in educational fields of common interest with a special focus on supporting the human development pillar of Qatar National Vision 2030, and Qatar's constant striving to become a knowledge-based economy. The MoU particularly influences the domain of educational governance and policies, such as education technology, vocational education, and quality assurance in schools and HEIs.¹⁹ The first annual UK-Qatar strategic dialogue was held in London in 2023 and included education as well as science and innovation among its areas of cooperation.²⁰

As noted in the previous section, several UK HEIs operate transnational education partnerships in Qatar. Aside from current cooperation described in that section, University College London operated a branch campus in the country from 2012 to 2020 before withdrawing in line with their global strategy.

Academic research collaboration between the two countries is also rising, with 909 joint publications published in 2023 with co-authors from both the UK and Qatar. This represents a 35 per cent increase over five years earlier. Many of the top co-publishing universities such as Northumbria University, Liverpool John Moore's, and UCL (before campus closure) are universities with existing links with local Qatar Universities. Other UK institutions have recently established formal partnerships with partners in Qatar, such as the University of Surrey which signed a Memorandum of Understanding (MoU) with Qatar University to establish collaboration in the field of education and research. At the government level, Qatar is interested in increasing research and partnerships in the fields of AI and medical studies.

The UK Science and Innovation Network (SIN) also supports science and innovation collaboration with Qatar, and in recent years has supported collaborative efforts to hold events in areas such as AI, cybersecurity, fintech, and food and water security. The UK SIN network also supported the formation of an inter-government working group to enable scientific cooperation in areas related to agriculture and the environment, While Genomics England and Qatar Genome programme have also exchanged visits to enable cooperation in the areas of genomics research and precision medicine.

Qatar is currently reviewing its qualification recognition framework, and the UK will assist MEHE to review and enhance the existing process / procedures in qualifications recognition and provide technical support to the Qatari NQF revision, particularly the descriptors and pathways including TVET learning. There is also interest in potential cooperation on special educational

¹⁹ Qatar and UK sign MoU in education cooperation, *Qatar News Agency*, 2022, www.qna.org.qa/en/News-Area/News/2022-06/04/0031-qatar-and-uk-sign-mou-in-education-cooperation

²⁰ Qatar-UK inaugural Strategic Dialogue 2023: joint communiqué, gov.uk, 2023 <https://www.gov.uk/government/news/the-inaugural-strategic-dialogue-between-the-state-of-qatar-and-the-united-kingdom-joint-communique>

needs and disabilities, with an upcoming (March 2024) dialogue between MEHE and the UK's DFE, with quality control and assurance in this field as one of the main areas of interest.

The number of UK students currently studying in Qatar is currently quite low, with only 70 UK students funded to study in the country under the Turing Scheme. Qatari universities are interested in attracting more students from the UK, and Turing Scheme funding could be an option to help incorporate student mobility opportunities into partnership proposals between universities in the two countries. Qatar is also interested in applying learning from the Study UK campaign to its own new Study Qatar scheme; this scheme aims to attract more students to study in Qatar.

Scholarships are an important part of the higher education landscape in Qatar, and are generally only available to talented Qatari nationals, not expatriate students. Alongside the MEHE, many other government and semi-government organisations in Qatar offer scholarships to Qatari students in order to provide financial aid for international study in the UK. According to HESA data, around 20 per cent of all Qatar-domiciled international students in the UK were funded by an overseas government in the 2021/22 academic year; this proportion rises to 35 per cent among Qatari nationals. By comparison, only 3 per cent of total inbound international students to the UK in 2021/22 were funded by an overseas government, which underscores the importance of government scholarship provision in the Qatari international student market.