

Examining Sustainability of Transnational Education (TNE) in Egypt, Qatar, and the United Arab Emirates (UAE)

Including case studies from Egypt, Qatar, and UAE, and a TNE sustainability toolkit for supporting sustainable partnerships

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Examining sustainability of Transnational Education in Egypt, Qatar, and United Arab Emirates

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1. Executive Summary

This report, commissioned by the British Council, outlines a sustainable transnational education (TNE) framework, designed to aid UK universities and their international counterparts in creating robust partnerships. Developed through literature reviews and consultations with policymakers, university leaders, faculty, and students in Egypt, Qatar, the United Arab Emirates (UAE), and the UK, the framework features five key TNE sustainability pillars: mutual benefits, financial viability, breadth and depth, leadership and people development, and trust and communication.

- 1. Mutual benefits:** This encompasses goal alignment between institutions and aims to provide benefits to all involved parties—students, faculty, staff, partnering institutes, IBCs, the local community, and the countries as a whole—while also ensuring equity and fairness.
- 2. Financial viability:** This pillar refers to the establishment of a robust financial model, securing initial fundings, allowing sufficient time for growth, and transitioning to self-sustainability. One key indicator for financial viability is successful student recruitment, driven by strong brand positioning, effective recruitment strategies, and relevant programme offerings. Another indicator is the diversification of funding sources, such as forming industry partnerships.
- 3. Breadth and depth:** This pillar refers to the growth in both the quantity and quality of TNE activities between UK institutions and their partners. TNE operations often start with a few educational programmes, as the hosting partners adopt administrative practices to enhance quality and efficiency. As educational delivery capacity grows, research collaborations develop, extending beyond partner institutions to include industries and larger communities.

4. Effective leadership and people development:

This involves stakeholder management and relationship-building as well as effective people management and development.

5. Mutual trust and open communication:

Transparency and mutual understanding is vital for all TNE activities at multiple levels. The framework is designed to capture the evolving nature of TNE partnerships as they mature. The pillars are interconnected. For instance, financial viability depends on the breadth and depth of the relationships between partners and the mutual benefits they continue to provide to each other.

TNE in Egypt, Qatar, and UAE

This report examines TNE as it pertains specifically to independent and collaborative educational partnerships established between UK universities and institutions in Egypt, Qatar, and the UAE. While we acknowledge the role of online, distance, and flexible learning models in the broader TNE landscape, our scope excludes purely distance or online-only models. Instead, we focus on physical and blended educational frameworks that require substantial in-country presence and active local engagement. The comparison of the market viability of TNE in Egypt, Qatar, and the UAE reveals distinct strengths and opportunities in each country. Egypt leads in TNE enrolments due to its large student population, providing a robust market for TNE. Qatar, with its stable enrolments and ability to charge higher tuition fees, presents a strong market for TNE initiatives that align well with the country's development goals. The UAE, with its strong economy and employment prospects for graduates, has high potential to attract international students. Additionally, all three countries offer significant potential for research collaborations and the development of industry partnerships.

Finding 1: TNE Enrolments in UK Universities

- Egypt leads the Middle East and North Africa (MENA) region in TNE enrolment with 27,865 students in 2022-23.
- UAE follows closely with 21,825 students.
- Qatar with 3,345 students.
- Due to economic and currency challenges, more Egyptian students are likely to opt for studying in Egypt rather than going abroad.

Finding 2: Number of Undergraduate UK TNE Students

- Egypt has the highest number of undergraduate students at 24,530 in 2022-23.
 - * 99% in-person, 1% online/flexible.
- UAE follows at 11,445 students
 - * 89% in-person, 11% online/flexible.
- Qatar with 1,545 students
 - * 86% in-person, 14% online/flexible.
- Most undergraduate TNE students are enrolled in TNE programmes that are delivered primarily in person.

Finding 3: Number of Postgraduate UK TNE Students

- UAE has the highest number of postgraduate students at 10,380 in 2022-23.
 - * 62% in-person, 38% online/flexible.
- Egypt has 3,305 postgraduate students
 - * 70% in-person, 30% online/flexible.
- Qatar has 1,805 postgraduate students
 - * 55% in-person, 45% online/flexible.
- UAE leads in postgraduate TNE enrolments, with a significant demand for flexible delivery options; Qatar, though with fewer students, shows the highest proportion of online/flexible enrolments, indicating a strong preference for flexible models among postgraduate TNE students across all three countries.

Finding 4: Research Income by Industry Per Staff Member ¹

- Egypt: Research income per staff increased from \$48,338 to \$100,807 between 2017-2021, showing a growing potential in research partnership and collaboration.
- UAE: Research income per staff remains high at \$243,792, but has reduced from \$395,475 in 2017.

Finding 5: University Enrolment Numbers

- Egypt has the highest university enrolments with 3.5 million in 2022.
- UAE has 159,000 enrolments.
- Qatar has 41,000 enrolments in 2020/21.

Finding 6: Prospective Student Population Size

- Egypt: 12,177,000 people aged 12-17 in 2021.
- UAE: 426,000 people aged 12-17.
- Qatar: 123,000 people aged 12-17.

Finding 7: International Student Numbers ²

- Egypt: 87,049 international students at HEIs in 2022/23.
- Qatar: 15,000 overseas citizens at universities in 2020/21 (including locally domiciled expatriates).
- UAE: 60,713 overseas citizens at HEIs in 2022 (including locally domiciled expatriates).

Finding 8: Income Per Capita and Affordability

- Qatar: \$87,480 income per capita.
- UAE: \$52,976 income per capita.
- Egypt: \$3,513 income per capita.
- Higher income per capita in Qatar and the UAE makes TNE education more accessible compared to Egypt.

¹ The data came from the Times Higher Education Database. In 2021, 38 universities in Egypt and 14 universities in the UAE reported data for ranking purposes. The data for Qatar is excluded from the comparison here given that only one university reported data, which does not constitute a representative sample.

² Central Agency for Public Mobilization and Statistics (CAPMAS), "Annual Bulletin of Students Enrolled – Teaching Staff, Higher Education" https://www.capmas.gov.eg/Pages/Publications.aspx?page_id=5104&Year=23350
United Arab Emirates Ministry of Education, "Open Data" <https://www.moe.gov.ae/En/OpenData/Pages/home.aspx>
State of Qatar Planning and Statistics Authority, "Education in Qatar: Statistical Profile 2022" <https://www.psa.gov.qa/en/statistics/Statistical%20Releases/Social/Education/2022/Educati>

TNE Sustainability in Egypt, Qatar, and the UAE

Further analysis was conducted to examine how the TNE landscape had been shaped by government policies and the broader social, and economic conditions of these countries. Case studies of six British Universities and their partners in Egypt, Qatar, and the UAE were undertaken to illustrate how the sustainability indicators figure in various TNE models in these countries.

Egypt

In Egypt, the focus of TNE is on expanding access to high-quality education for its large, young population, as aligned with the government's 2030 strategy for higher education encompassing increasing tertiary enrolments, increasing international students, accrediting all institutions, and improving global rankings. In the MENA region, Egypt currently provides, and will likely continue to provide, the highest TNE enrolments for UK institutes. The university sector has concentrated on expanding research through industry partnerships, as reflected in substantial growth in research income from industry over the past years. Egyptian students value international exposure and work and study opportunities abroad provided by British Universities.

The Egyptian government supports international partnerships with both private and public universities. Private sector partnerships, such as international branch campuses (IBCs) and

franchise operations, often involve higher tuition fees. In contrast, joint or dual degree programmes with public and private universities, which provide broader access to education, are more financially viable and common in Egypt. This is exemplified by the strategic partnership between the University of East London (UEL) and Ain Shams University, a prestigious public university in Egypt. This partnership has proven to be mutually beneficial, enabling both universities to enhance their reputation and expand their global reach, while also increasing student mobility.

Another successful example is the international branch campus established by the University of Hertfordshire (UH) and the Global Academic Foundation (GAF). Through effective leadership, this IBC extends the university's comprehensive curriculum and operational excellence, offering private education opportunities to a growing number of students in Egypt.

Qatar

In Qatar, TNE focuses on providing high-quality, differentiated education that aligns with government goals and student needs. While Qatar has a relatively smaller domestic student population, the country's increased soft power along with the government's plan to ease visa requirements has made it more attractive to international students. High income levels in the country support the affordability of higher tuition fees, often associated with IBCs and franchise programmes. However, the emphasis on higher-ranked universities makes it challenging for lower-tier institutes to enter the market.

Qatari institutions are focused on developing capacity by adopting the best educational and administrative practices from foreign universities. In the future, TNE partnerships in Qatar are expected to evolve from delivering education to emphasising industry-university partnerships and enhancing research capacity. This is also reflected in Qatari students prioritising industry-specific experiences, such as internships, over general international exposure.

The Qatar Finance and Business Academy (QFBA)-Northumbria University case study demonstrates successful TNE by combining local expertise

with industry partnerships, providing valuable internships that meet local needs. The case study further shows how open communication helps address operational challenges and cultural differences, contributing to long-term sustainability.

Another successful partnership is in the area of Technical and Vocational Education and Training

UAE

The UAE holds strong potential in enhancing its higher education sector and attracting international students and talent. The country's robust economy, strategic position as a business and technology hub, along with government efforts to diversify the economy, make it highly appealing to international students. Strengthening the higher education system also supports the government's broader policy on Emiratisation, increasing the employment of UAE nationals in the workforce.

Cities like Dubai and Abu Dhabi offer numerous career opportunities and resources, boosting the UAE's competitiveness in education and international student recruitment. As the capacity of education delivery increases, TNE efforts may increasingly focus on research collaboration and expanding industry-university partnerships. The UAE's IBCs have the potential to rival or complement current TNE providers, positioning the UAE as a competitive player in the global education market.

The IBC model is the most prevalent form of TNE in the UAE. The TNE landscape in Dubai and Abu Dhabi has become increasingly competitive, with these emirates favouring high-ranked universities. UK institutions looking to establish sustainable TNE ventures could also consider opportunities in Sharjah and Ras Al Khaimah. To succeed in the UAE, the government and local authorities emphasise that universities must demonstrate financial viability, ensure high-quality education and parity between the UK and the UAE campuses, and align with the country's development goals while enhancing student employability.

(TVET), a key development focus for the Qatari government. The University of Central Lancashire (UCLan) collaborates with the Police Academy under the Ministry of Interior to build capacity in policing and fire and safety engineering. This partnership leverages UCLan's educational and research expertise to enhance training in these critical areas.

The University of Birmingham's Dubai campus exemplifies its alignment with Dubai's focus on high-quality education. By maintaining rigorous admission standards and extending its UK-based educational practices, the University ensures high standards while adapting programmes for Dubai students. Featuring world-class facilities, the campus supports the university's global expansion, enhancing its reputation and providing stable funding amid evolving UK immigration policies and challenges for international students.

Similarly, Middlesex University Dubai, one of the first and largest IBCs in the UAE, demonstrates financial viability by maintaining strong student enrolment. This success is supported by a focus on student experience, effective international recruitment practices, and a broad range of programme offerings aligned with Dubai's economic needs.

Finally, building on this report, detailed sustainability indicators have been crafted to assist UK universities and their international counterparts in forming strong, equitable, and adaptable collaborations that align with both institutional and regional objectives. These indicators, grounded in the principles of mutual benefits, financial viability, partnership breadth and depth, effective leadership and people development, and mutual trust and openness, offer a practical tool for assessing and enhancing the sustainability of TNE partnerships at various stages of development.

2. Introduction

This report, commissioned by the British Council, examines the factors contributing to the sustainability of Transnational Education (TNE) in Egypt, Qatar, and the United Arab Emirates (UAE). While financial viability creates the foundation for sustainable TNE operations, the prevailing view in the literature and among TNE practitioners is that sustainability extends beyond financial gain. Indeed, for partnerships to be viable in the long term, they must contribute to the host country's development and economic goals and align with the broader goals of the participating institutions. Increasingly, TNE sustainability also focuses on contributing to the United Nations (UN) Sustainable Development Goals, while encompassing equity and fairness.

TNE sustainability varies across countries at different levels of resources, income and development. It is also shaped by the development stages of the host countries and institutions. Therefore, this paper seeks to develop a TNE sustainability framework that reflects how concepts of sustainability evolve as partnerships between institutions mature. The framework consists of five indicators – mutual benefits, financial viability, breadth and depth,

effective leadership and people development, and mutual trust and open communication. By examining specific demographic and economic data along with the development goals of these countries, the current TNE sustainability framework will be tailored specifically for this region. Case studies are undertaken to highlight these sustainability indicators.

The report below has four sections following the methodology:

- 1) Literature review: Establishing the parameters for the TNE sustainability framework.
- 2) TNE education in Egypt, Qatar, and the UAE: Identifying the needs and trends for TNE in Egypt, Qatar, and the UAE by analysing the enrolment data and relevant economic and demographic data.
- 3) TNE sustainability framework: Outlining five key indicators for TNE sustainability.
- 4) Country-specific focus: Analysing how the TNE landscape is shaped by each country's regulatory environment and the opportunities and challenges for British universities, illustrated by two case studies.

3. Methodology

The research involves:

- 1) Literature review on sustainable partnership development.
- 2) Desk research of the regulatory and policy environment of TNE in the three countries.
- 3) Data analysis with sources from sources from the Higher Education Statistics Agency (HESA) data, UNESCO and World Bank data, and university, news and other websites.
- 4) Qualitative interviews: Interviews were held with nine policymakers and 22 university leaders and faculty members from the three target countries and the UK.

Additionally, four focus groups involving 23 students were conducted to gather insights from all key stakeholders.

Based on the insights gathered from the interviews, specific sustainability indicators were developed, and six case studies were undertaken, representing various TNE models to illustrate the different aspects of sustainability.

4. Literature Review

Sustainable TNE Partnerships

In his discussion of sustainable global partnerships in higher education, Michael Lanford outlines four main threats to sustainability: divergent goals and motivations, inadequate financial planning, leadership turnover, and poor staff morale.³

In terms of goal divergence, a recent report by the British Council identified both alignment and discrepancies between the objectives of UK institutes exporting TNE and the hosting institutes.⁴ The sending and hosting institutes tend to share the view that the partnerships enhance institutional reputation. However, while the exporting institutes and their international branch campuses (IBCs) prioritise revenue generation and recruitment of international students, the partnering institutes tend to value capacity building in teaching, learning, and research, improving English language proficiency, transferring professional and technical knowledge, and strengthening quality assurance processes. These discrepancies can cause friction to the partnerships. In addition, failure to contribute to the long-term development goals of the hosting countries can also pose risks to TNE operations. Indeed, academic programmes may not be approved unless they are demonstrated to be addressing skills development and employability gaps.

Inadequate financial planning has often plagued TNE partnerships. TNE partnerships often began through personal connections rather than thorough market analysis.⁵ Yet, without robust financial planning, awareness of the market position and core values, and an understanding of the competition, TNE operation may struggle. For instance, in the MENA region, while UK

education has strong market appeal, qualification recognition and macro factors like currency devaluation in Egypt can impact financial viability.

The final two threats are changing leadership and poor staff morale in Lanford's view. Leaders perform a vital role in stakeholder management, balancing competing demands from external and internal stakeholders with differing agendas. Leadership turnover disrupts the vision and trajectory for global partnerships. Faculty recruitment and retention are also challenging, with reluctance to relocate and differing expectations regarding governance, academic freedom, and duties. Additionally, academic staff may be concerned that teaching in satellite campuses may impact their career opportunities. The reliance on part-time faculty can undermine teaching and research quality, while cultural dissonance and unaddressed challenges in foreign environments contribute to poor morale.

Cultural differences in staff relationships, organisational hierarchies, power dynamics within the partnership, and leadership norms can lead to misunderstandings. Therefore, it is crucial to build mutual trust and respect through open communication channels. Taken together, sustainable TNE partnerships should focus on goal alignment, financial sustainability, effective leadership, and people development, while also establishing trust and open communication.

In addition to the above factors, TNE sustainability also depends on its capacity to adapt to change. The value of TNE to a country evolves as the country develops. In this process, TNE tends to shift from quantity or revenue-driven to quality-focused provision (International Higher Education Commission, IHEC). In Qatar and the UAE, particularly in Dubai and

³ Lanford (2019). 'Long-Term Sustainability in Global Higher Education Partnerships.' Successful Global Collaborations in Higher Education Institutions, pp 87-93.

⁴ The Value of Transnational Education Partnerships Part of Going Global Partnerships. (n.d.). https://www.britishcouncil.org/sites/default/files/value_tne_fullreport.pdf

⁵ The Role of Transnational Education Partnerships in Building Sustainable and Resilient Higher Education. (n.d.). https://ihecommission.uk/wp-content/uploads/2023/12/IHEC_TNE-report_13_12_2023.pdf

Abu Dhabi, the focus is increasingly on university rankings to enhance sector quality and attract international students. In Egypt, there is a continuing trend to develop specialised dual/joint degrees with public and private universities, while fostering research collaborations. Furthermore, equitable partnerships characterised by the mutual exchange of people, programmes and institutions are becoming more prominent, contrasting with traditional one-way TNE models.⁶

Looking at TNE more broadly, Tierney conceptualises international partnerships as strategic tools for fostering innovation and addressing real-world challenges.⁷ These collaborations enable universities to enhance research capacity, study problems within their real contexts, pool resources to prevent underfunding, reduce duplication, amplify the impact of research outcomes, and decrease technology transfer costs. Overall, international partnerships serve as a mechanism for universities to disrupt traditional approaches and innovate solutions to global problems.

A growing body of research supports that TNE models must be rooted in deep, equitable, and mutually beneficial partnerships. Healey suggests that such partnerships should aim to promote a socially just and sustainable world.⁸ In a recent Universities UK International (UUKi) article, equitable partnerships are described as complex, requiring time, trust, and balance, with a focus on non-economic benefits and consideration of diverse stakeholder needs.⁹ This perspective is echoed in the Quality Assurance Agency for Higher Education's (QAA) interim report, which defines high-quality partnerships as those that 'promote mutual respect and bi-directional enhancement.'¹⁰ The British Council also emphasises that TNE should align with the Sustainable Development Goals (SDGs), addressing social, environmental, and economic concerns through equitable partnerships. This approach reflects the UN's definition of sustainable development: meeting present needs without compromising the ability of future generations to meet theirs, prioritising long-term well-being over short-term gains.¹¹

⁶ The Role of Transnational Education Partnerships in Building Sustainable and Resilient Higher Education. (n.d.). https://ihecommission.uk/wp-content/uploads/2023/12/IHEC_TNE-report_13_12_2023.pdf.

⁷ Tierney, W. G. (2019). Creating an Organizational Climate for Global Partnerships: Challenges and Opportunities. *Successful Global Collaborations in Higher Education Institutions*, 13–21. https://doi.org/10.1007/978-3-030-25525-1_2

⁸ Healey, N. M. (2023). Reinventing international higher education for a socially just, sustainable world. *Perspectives: Policy and Practice in Higher Education*, 27(4), 169-178. <https://doi.org/10.1080/13603108.2023.2217780>

⁹ Universities UK International. 'Developing Equitable TNE Partnerships: Where to Begin.' UUKi Insights. June 3, 2024. <https://www.universitiesuk.ac.uk/universities-uk-international/insights-and-publications/uuki-insights/developing-equitable-tne-partnerships>.

¹⁰ Quality Assurance Agency for Higher Education, "Quality Evaluation and Enhancement of UK Transnational Higher Education Sustaining growth and quality in UK TNE: Interim findings from QE-TNE Scheme August 2024," accessed October 29, 2024, <https://www.qaa.ac.uk/international/transnational-education/quality-evaluation-and-enhancement-of-uk-tne>.

¹¹ Transnational Education Strategy 2023-2025. British Council. <https://www.britishcouncil.org/sites/default/files/transnationaleducationstrategy.pdf>

Sustainability for Different TNE Models

TNE models generally fall into two categories: collaborative and independent.¹² Collaborative models, like dual or joint degree partnerships, involve cooperation between institutions, allowing students to earn co-branded degrees. The hosting institutes may retain oversight and promotion authority over their own staff, with compensation often generated from the programme itself.¹³ These partnerships enhance academic collaboration and resource sharing, but they can be complex due to differing academic standards, accreditation processes, and institutional cultures. In Egypt, for instance, universities must harmonise programmes to meet both UK and Egyptian accreditation requirements, while ensuring open communication and mutual respect between faculty and leadership teams.

Independent TNE models, such as IBCs or franchise agreements, offer more autonomy in academic and administrative affairs. IBCs often have control over admissions, faculty hiring, and programme design, while the home institution maintains academic quality. This often

involves implementing the home institution's curriculum at the satellite campus. These models simplify management but may raise concerns about cultural relevance if foreign curricula are implemented without adapting to the local context.

IBCs can face significant financial risks due to the need for physical infrastructure and marketing investments. In countries like Egypt, Qatar, and the UAE, UK universities often find private investors to minimise risk. Though IBCs offer funding opportunities, they can take longer to become profitable.¹⁴ Maintaining reputation is critical, and differences in quality between home and satellite campuses can tarnish a university's brand.

Both collaborative and independent models must align with national development goals. University leaders are crucial in engaging stakeholders and policymakers to adapt to changing local needs. Additionally, cultural, logistical, and regulatory challenges require effective leadership and people management to sustain TNE operations.

¹² Transnational education: A classification framework and data collection guidelines for international programme and provider mobility (IPPM). British Council and German Academic Exchange Service. https://www.britishcouncil.org/sites/default/files/tne_classification_framework_final.pdf

¹³ Antony & Nicola (2019). 'The Tricky Terrain of Global University Partnerships.' Successful Global Collaborations in Higher Education Institutions, pp 75-86.

¹⁴ Managing risk and developing responsible transnational education (TNE) partnerships. British Council and Universities UK International. <https://www.universitiesuk.ac.uk/universities-uk-international/insights-and-publications/uuki-publications/managing-risk-and-developing-responsible>

Table 1. Sustainability in different TNE models

	Collaborative (Partnership programmes, joint/dual degrees, distance learning with a local partner)	Independent (Franchise, validation, IBCs, self-study distance learning)
Mutual benefits	<ul style="list-style-type: none"> • Share prestige of co-branded degrees. • Focus on goal alignment with partner institutes. • Enhanced academic collaboration and cultural exchange. • Greater access to resources and expertise in both institutes for students. 	<ul style="list-style-type: none"> • Direct extension of home institution to a global audience. • Focus on alignment with national development goals.
Financial viability	<ul style="list-style-type: none"> • Focus on harmonising academic programmes and accreditation standards. • Institutes may look to build further ties with other institutes from the partnering institutes' countries. • Focus on research collaboration. • Broader academic and cultural integration. 	<ul style="list-style-type: none"> • Focus on aligning student admission criteria. • Focus on programme expansion, developing research capacity and collaboration opportunities. • Adopt the best administrative practices from the home campus.
Leadership and Staff Development	<ul style="list-style-type: none"> • Shared decision-making process or leadership. 	<ul style="list-style-type: none"> • Greater autonomy in recruitment, promotion, and retention and staff development. • Need to focus on talent acquisition. • Leaders need to focus on engagement with government.
Mutual trust and open communication	<ul style="list-style-type: none"> • Promote mutual respect and understanding between staff members in partnering institutes. 	<ul style="list-style-type: none"> • Unify or develop the branch campus' identity.

5.TNE Education in Egypt, Qatar, and the UAE: Trends and Needs

This section compares the viability of TNE markets in Egypt, Qatar, and the UAE. The results show that Egypt currently provides and will likely continue to provide, the largest number of TNE enrolments. However, given the country's economy, only a small proportion of the population will be able to afford high tuition fees often associated with IBCs, franchise programmes or other private arrangements. On the other hand, joint/dual degree partnerships with public universities can provide greater access at lower costs to a larger number of students and are considered more financially viable options for new market entrants.

Qatar maintains a healthy number of enrolments and has a stable growth of international students. The country enjoys higher income per capita and more capability to afford higher tuition.

IBCs and franchise programmes that focus on the country's development goals have potential to thrive.

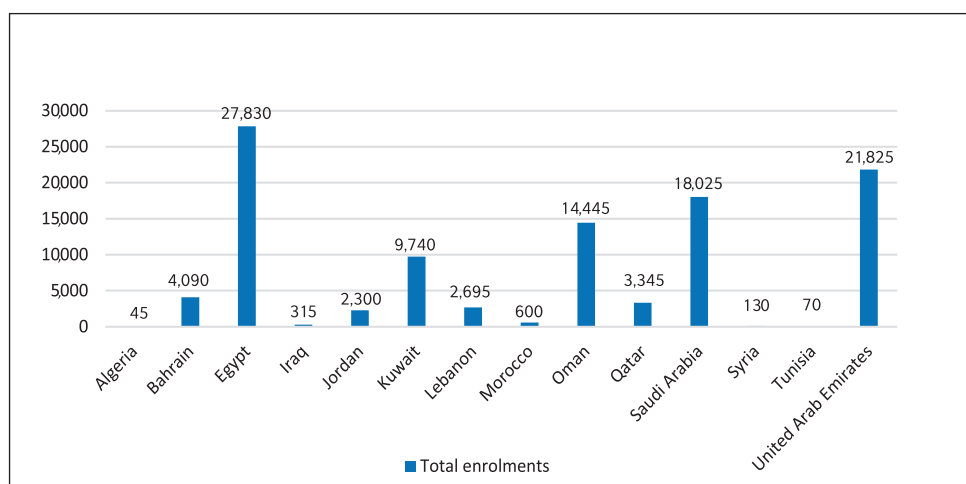
The UAE focuses on strengthening its higher education sector to enhance Emirati employability and recruit international students, ultimately supporting the country's future development. The strength of the UAE's economy, along with its growing number of graduate students, suggests that the UAE has huge potential in delivering education or to compete with UK and other TNE exporting countries in the recruitment of international students.

Finally, TNE in these countries will likely place increasing emphasis on research collaboration, industry-university partnerships, and multiparty collaborations.

Key findings

- 1. TNE enrolments in UK universities:** Based on the HESA data, Egypt led in TNE enrolment in the MENA region with 27,865 students (2022-23), followed closely by the UAE with 21,825 and Qatar with 3,345. Given its economy and currency crisis, it is projected that more Egyptian students seeking foreign education will opt to study in Egypt rather than going abroad.

Figure 1. TNE Enrolments in UK universities in the MENA region 2022/23.



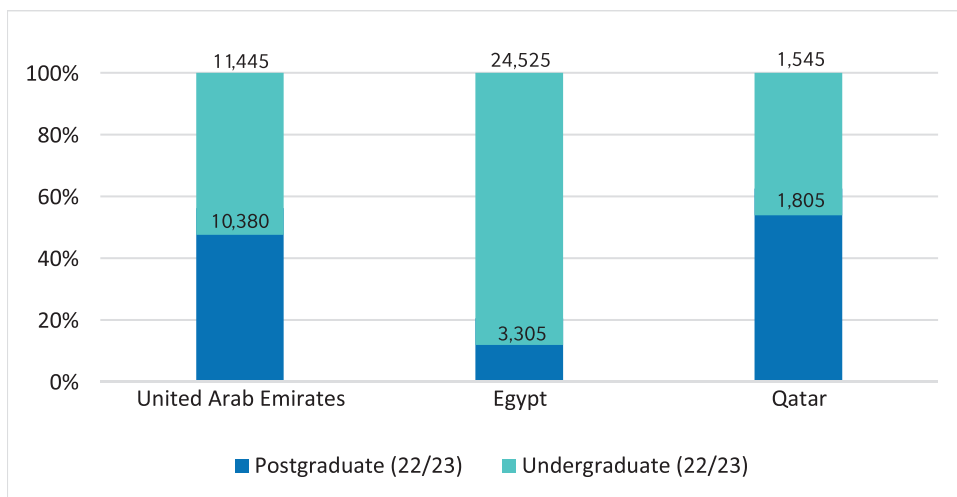
Source: HESA Aggregate Offshore Record. with Oxford Brookes University.

Note: Algeria, Tunisia, Syria and Iraq TNE numbers mainly come from online/flexible learning.

2. Number of postgraduate students: Comparing Egypt, Qatar, and the UAE, the UAE has the highest number of postgraduate students, with 10,380 postgraduate enrolments in 2022-23, compared to 3,305 in Egypt and 1,805 in Qatar.

This indicates its potential to transition to different types of TNE partnerships and a significant potential for developing research collaborations as well as transitioning in terms of the TNE models in the near future.

Figure 2. Student enrolments in UK TNE by degree level (2022/23)

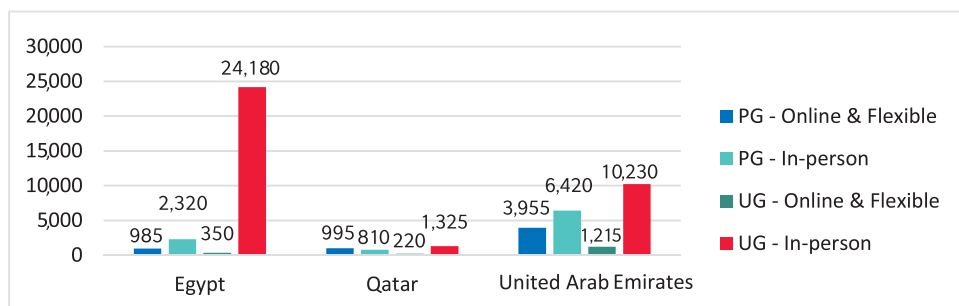


Source: HESA Aggregate Offshore Record.

3. TNE Enrolments: In-person vs. online and flexible delivery mode (2022-23)

The enrolment data reveals a notable difference in delivery mode preferences between undergraduate and postgraduate TNE students. Among undergraduate students, the vast majority are enrolled in programmes delivered primarily in-person, with Egypt leading at 99% in-person enrolment, followed by the UAE at 89%, and Qatar at 86%. This indicates a clear preference for traditional, in-person delivery at the undergraduate level. In contrast, postgraduate students demonstrate a stronger inclination towards online and flexible delivery models. The UAE, with the highest number of postgraduate enrolments, has 38% of its students in online or flexible programmes, while Egypt and Qatar follow with 30% and 45% respectively. This trend suggests that postgraduate TNE students, particularly in Qatar, are more receptive to flexible learning options, likely due to the professional and personal commitments often associated with advanced studies.

Figure 3: TNE Enrolments: In-person vs. online and flexible delivery mode (2022-23)



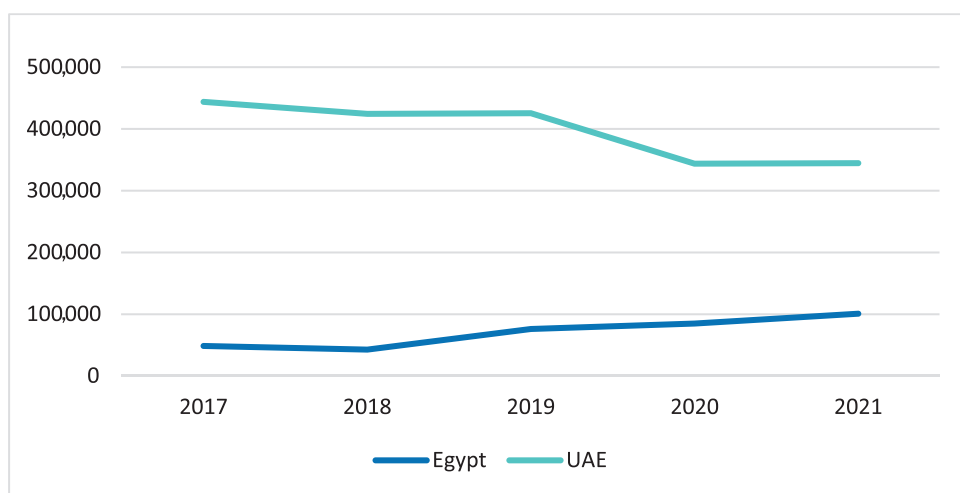
Source: HESA Aggregate Offshore Record.

4. Research income by industry per staff member (2017-21): The results show that in Egypt, research income per staff member increased from \$48,338 to \$100,807, reflecting a 100% increase over five years, indicating a strong growth potential. In the UAE, although the research income per staff member is significantly higher than Egypt, it decreased from \$395,475 to \$243,792, with a -.38 growth rate.¹⁵

This data came from the Times Higher Education (THE) Database for World University Rankings. In 2021, 38 universities in Egypt and 14 universities in the UAE reported data for ranking purposes. While Qatar has significant academic research funding from industry, with a goal of having 60% of research expenditure come from the private sector by 2030,¹⁶ the data for Qatar is excluded from the comparison for this finding here. The reason is that the THE’s database has data from only one university in Qatar, which does not constitute a representative sample. Research income per staff is calculated by dividing the total research income from industry the reporting universities divided by the total number of staff of those universities.

Expanding on the broader context, Gross Domestic Expenditure on Research and Development (GERD) as a percentage of GDP in 2021 varied significantly across Egypt, the UAE, and Qatar. The UAE led the region, investing 1.50% of its GDP in R&D, followed by Egypt at 0.91% and Qatar at 0.68%. These figures underscore each country’s commitment to advancing research and innovation, with the UAE taking a prominent position. This emphasis on R&D investment aligns with the UAE’s high research income per-staff figure, despite recent declines, and highlights Egypt’s growing potential for industry partnerships in academic research. Qatar, though not included in the per-staff income analysis, maintains a strong focus on increasing private sector contributions to research, aiming for 60% of research expenditure from industry by 2030.¹⁷

Figure 4: Research income by industry per staff member Egypt Vs UAE



Source: Times Higher Education, World University Rankings 2024.

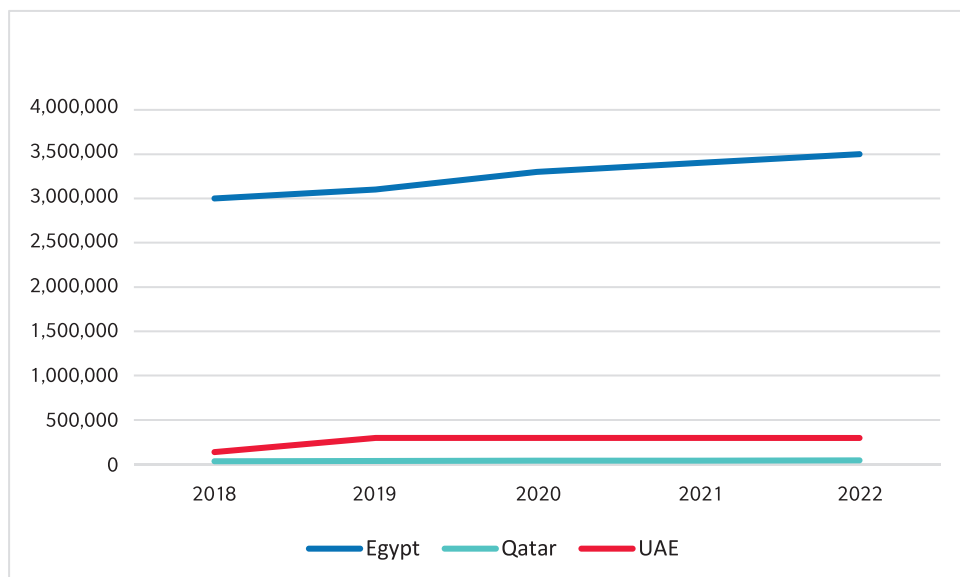
¹⁵ Times Higher Education. (2023). World University Rankings 2024. https://www.britishcouncil.org/sites/default/files/tne_classification_framework-final.pdf

¹⁶ Online Reader - Oxford Business Group. (2021, November 23). Oxford Business Group. <https://oxfordbusinessgroup.com/online-reader?id=301040>

¹⁷ Research and development expenditure (% of GDP) - Egypt, Arab Rep., Qatar, United Arab Emirates, UNESCO Institute for Statistics (UIS), UIS.Stat Bulk Data Download Service, accessed September 30, 2024, apiportal.uis.unesco.org/bdds. It is important to note that this measure of R&D expenditure includes a broad range of activities, much of which is product-focused development work within private companies. This differs from the more academically-oriented research typically conducted at universities, making direct comparisons challenging.

5. University enrolment numbers: Egypt currently has the highest university enrolments at 3.5 million in 2021-2022 compared to 296,619 in the UAE and 43,899 in Qatar in the same year. While the governments in these countries have plans to expand higher education, Egypt is expected to reach 5 million in 2030. This projection could be substantiated by its prospective student population size.

Figure 5. Tertiary education enrolment numbers 2018-2022.



Sources:

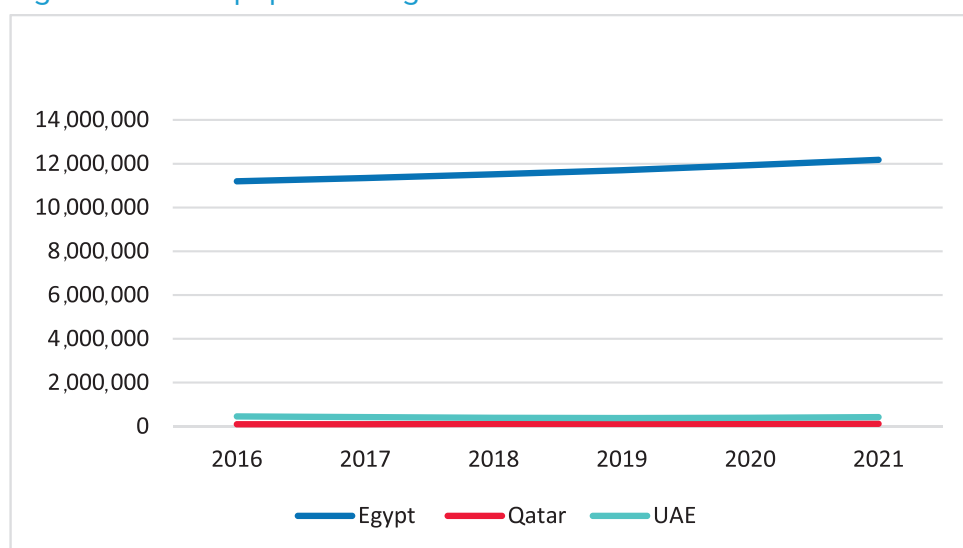
Egypt- Central agency for public mobilization and statistics CAPMAS (2023);

Qatar - The State of Qatar: Planning and Statistics Authority (2022);

UAE - The Federal Competitiveness and Statistics Centre, Ministry of Cabinet Affairs in the United Arab Emirates (2024).

- **Prospective student population size:** Egypt has a clear advantage with its large prospective student population. In 2021, the population aged between 12 and 17 in Egypt is 12,177,000, followed by 426,000 in the UAE, and 123,000 in Qatar. The large number of young people in this age group suggests a high demand for secondary and higher education in the coming years.

Figure 6. Size of population aged 12 to 17 2016-2021.

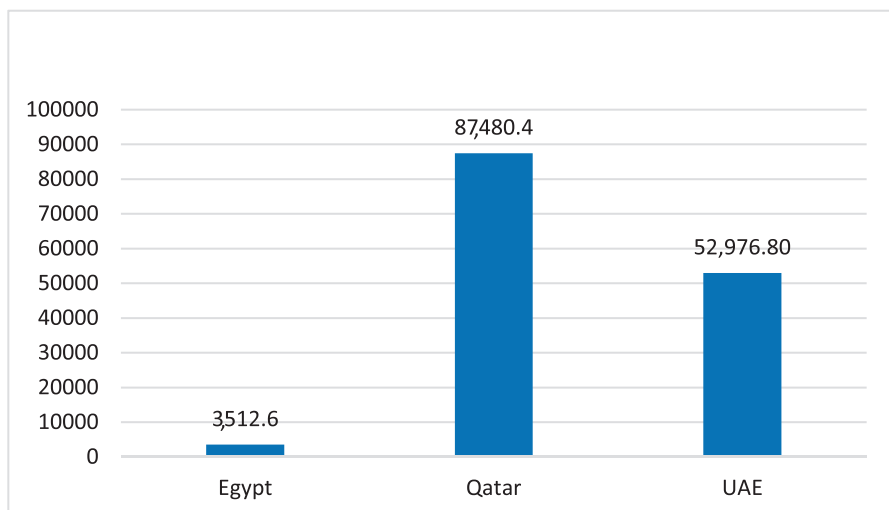


Source: United Nations, Department of Economic and Social Affairs, Population Division (2022). World Population Prospects 2022, Online Edition.

• **International students numbers:** A total of 87,049 international students were studying at Egyptian HEIs in the 2022/23 academic year, according to data from CAPMAS.¹⁸ In contrast a total of 60,713 overseas citizens were studying at higher education institutions in the UAE in 2022,¹⁹ although it is not clear how many of these were mobile international students as opposed to locally domiciled expatriates. Qatar reported around 15,000 non-Qatari students at universities in the country in 2020/21.²⁰

6. Income per capita and affordability of studying in the UK: Qatar and the UAE have the highest income per capita, at \$87,480 and \$52,976 respectively, compared to \$3,513 in Egypt, suggesting TNE education is not accessible to a vast number of students in Egypt.

Figure 7. Income per capita Most Recent Data.



Source: GDP per capita (current US\$), World Bank, 2023 data for Egypt and UAE, 2022 data for Qatar.

This is also reflected in the proportions of students from Egypt, the UAE, and Qatar studying abroad. For instance, based on data from HESA, only 3,720 Egypt-domiciled students were studying in UK HEIs in 2021/22, representing 0.11% of 3.50 million enrolled students at Egyptian HEIs that year. The equivalent proportion was 7.1% for Qatar (2,940 students in the UK compared to the most recent figure of 41,000 studying domestically), and 4.5% for the UAE (7,165 UAE domiciled students, including expatriates, compared to around 160,000 at HEIs in the UAE that year).²¹

¹⁸ Central Agency for Public Mobilization and Statistics (CAPMAS), "Annual Bulletin of Students Enrolled – Teaching Staff, Higher Education " https://www.capmas.gov.eg/Pages/Publications.aspx?page_id=5104&Year=23350

¹⁹ United Arab Emirates Ministry of Education, "Open Data" <https://www.moe.gov.ae/En/OpenData/Pages/home.aspx>

²⁰ State of Qatar Planning and Statistics Authority, "Education in Qatar: Statistical Profile 2022" https://www.psa.gov.qa/en/statistics/Statistical%20Releases/Social/Education/2022/Education_Statistical_Pro%EF%AC%81le_2022_EN.pdf

²¹ Higher Education Statistics Agency. (2020). Higher Education Student Data 2020. The year 2020 is used for the UAE as the data for 2021 is not yet available at the time of this report.

6. TNE Sustainability Framework

Based on the literature review, desk research, and interviews with stakeholders, this paper proposes five key indicators of sustainability for TNE partnerships: Mutual benefits, financial viability, breadth and depth of partnerships, effective leadership and people development, and mutual trust and communication. The framework views sustainable TNE as evolving enterprises, involving adapting goals and needs, reconfiguring of governance and operational structure, renegotiating leadership and people management strategies, as well as broadening and deepening of the ties beyond the institutional level.

1. Mutual benefits

This pillar, which encompasses goal alignment between institutes, aims to provide benefits to all involved parties—students, faculty, staff, partnering institutes, IBCs, the local community, and the countries as a whole—while ensuring equity and fairness.

First, TNE benefits students by expanding access to quality education and improving employability through opportunities such as domestic and international internships, exchanges, and job placements. Additionally, TNE enhances the overall student experience by offering international curricula that prepare students for the global job market.

For hosting institutions and their staff members, the benefits may include bridging capacity gaps, enhancing educational quality, and bolstering reputation. UK universities have a strong reputation for excellence due to their commitment to continuous professional development (CPD). TNE operations can integrate CPD for academic staff, ensuring quality assurance while supporting faculty at partner institutions to enhance skills,

experience diverse pedagogies, and improve teaching and research outcomes.²² Evidence of these improvements can be seen in the collaboration between the University of East London (UEL) and Ain Shams University in Egypt (discussed later in the paper), where quality assurance and assessment practices were enhanced as a result of the partnership. Another example is the partnership between the University of Northumbria and the Qatar Finance and Business Academy (QFBA), which has motivated academic faculty in Qatar to pursue advanced degrees.

For sending universities (including IBCs), the benefits involve increasing global impact, fostering internationalisation, and ensuring financial sustainability. While the benefits for IBCs are similar to those of home universities, the sustainability of IBCs also hinges on the idea that they should not be viewed as revenue drivers but as entities with either a unified identity with the home branch or a more unique, developing identity. The case study of the University of Birmingham discussed later in this paper illustrated the university's attempt to establish a unified identity between the Dubai campus and the Edgbaston campus.

For the local communities and governments of the host countries, sustainability means that TNE programmes are tailored to social and economic development needs. This involves aligning programmes with the host country's long-term vision and sustainability agenda, fostering skills building, and addressing job market demands. Furthermore, sustainability includes considerations for environmental impact, ensuring that physical infrastructure meets sustainability standards and does not contribute to environmental degradation.

²² Tran et. Al (2021). 'Induction and Off You Go': Professional Development for Teachers in Transnational Education.' Oxford Review of Education, pp 529-47.

For the UK, TNE activities contribute substantially to UK revenue. In 2021, the total revenue from UK education-related exports and TNE activities was estimated at £890 million, reflecting a 6.23% increase from 2020.²³

Finally, equity is manifest in various aspects of mutual benefits. While equitable arrangements may vary, the core concept revolves around balancing power dynamics and ensuring equitable share of knowledge among all parties involved.²⁴ Increasingly, equitable partnerships focus on mutual exchange of people and collaborative creation of knowledge. The case studies of the University of Birmingham Dubai in the UAE and QFBA, the University of Northumbria in Qatar, have highlighted the importance of localising the curriculum.

2. Financial viability

Financial viability is crucial for sustaining TNE partnerships, beginning with the establishment of a robust financial model. TNE operations may initially rely on government, private, or home university funding before transitioning to self-sustainability. Funding structures can vary based on the type of TNE, with some providers choosing short-term funding subject to review and renewal, allowing flexibility to adapt to evolving needs. Alternatively, long-term investments such as establishing an overseas campus require continuous financial commitment for maintaining physical infrastructure.²⁵

With either funding structure, universities exporting TNE should conduct a thorough assessment of the business case at the outset, rather than relying solely on a partner's assessment. This involves establishing business viability with market data, understanding regulatory requirements, and conducting environmental scans. Senior

university leaders stress the importance of allowing sufficient time for growth. Effective technology integration, as demonstrated by the University of Birmingham's Dubai campus, can also help reduce operational costs.

Financial viability depends on successful student recruitment. Factors such as offering unique programmes and building a distinctive brand and reputation can contribute to long-term financial sustainability. As the TNE operation develops, diversifying funding sources through industry partnerships, entrepreneurial ventures and other funding sources are important. A case example is UEL's three-party agreement with Alexandria University and the West Ham United Foundation to deliver a programme in sports coaching.

3. Partnership breadth and depth

Sustainable partnerships often evolve and deepen over time and across both teaching and research activities. In terms of education, sustainable partnerships can often involve transforming degree programmes as demand changes, building capacity, facilitating student and faculty/staff exchange, and enhancing overall quality and outcomes of education. In research, there is a focus on fostering increased collaboration, aligning with research and innovation priorities, and facilitating the growth of master's and PhD programmes. Operationally, sustainable partnerships entail integrating systems and processes to optimise the overall student and staff experience, leading to greater operational efficiency at scale and reducing technology transfer costs. A case example is the University of Hertfordshire's IBC which adopts the technology and administrative practices from the UK campus, and the University of Birmingham's IBC campus development in Dubai.

²³ UK Revenue from Education Related Exports and Transnational Education Activity." Explore Education Statistics. <https://explore-education-statistics.service.gov.uk/find-statistics/uk-revenue-from-education-related-exports-and-transnational-education-activity>.

²⁴ Developing equitable TNE partnerships: where to begin.' Universities UK. <https://www.universitiesuk.ac.uk/universities-uk-international/insights-and-publications/uuki-insights/developing-equitable-tne-partnerships>

²⁵ 'Managing risk and developing responsible transnational education (TNE) partnerships.' British Council and Universities UK International. <https://www.universitiesuk.ac.uk/universities-uk-international/insights-and-publications/uuki-publications/managing-risk-and-developing-responsible>

The implication here is that before engaging in the partnership, partnering institutes must assess alignment around academic and research ambitions, as well as operational viability, and devise a plan to address any gaps at multiple levels. In short, broadening and deepening links between partnering institutions and countries enhances sustainability.

4. Effective leadership and people development

Effective leadership, involving stakeholder management and relationship-building, is essential for sustainable partnerships. University leaders play a vital role in establishing connections with policymakers and fellow university leaders, which has significant implications on the positioning and overall strategic planning of the universities. For IBCs and franchise arrangements, UK university leaders interviewed in this study emphasised the importance of having senior university members present in the host countries to align the development plan of the host universities with the strategic goals of the UK universities.

In Lanford's view, TNE operations that adopt a distributed leadership model can help empower individuals throughout the organisation to develop leadership skills and assume operational responsibilities, addressing both leader and staff turnover issues. Yet, the hierarchical structure of the host institutes and other cultural context would need to be considered.

For people management and development, it is essential to outline operational policies relating to academic freedom, equity, diversity, and inclusion and establish clear job roles and curriculum design and delivery details at the outset. Training needs to be provided so that staff are aware of the policies and procedures. Furthermore, opportunities for professional growth need to be provided.

5. Mutual trust and open communication

Mutual trust and open communication at multiple levels are vital for all TNE activities.

During the partnership development phase, stakeholders should assess and articulate their motivations and priorities to establish a clear purpose and build trust for collaboration.²⁶ Between the institutes it is crucial to foster an environment of open dialogue and support individual professional growth to enhance members' sense of belonging and commitment. While formal policies that clarify responsibilities can prevent misunderstandings, proactive measures, such as online or in-person meetings that encourage mutual exchange and understanding and training that addresses academic freedom and cultural adjustment issues, are important for fostering a supportive work environment. For communication with students and parents, it is important to manage student expectation, provide access to academic and non-academic support, offer training modules on academic integrity and well-being, and establish clear policies and guidelines for student conduct.

In summary, sustainable TNE is defined by its capability to provide mutual benefits with equity and fairness, ensuring financial viability, broadening and deepening partnership links, promoting leadership and staff growth, and establishing trust and open communication. The pillars are interconnected. For instance, financial viability depends on the breadth and depth of the relationships between partners and the mutual benefits they continue to provide to each other. The following section will examine how these pillars play out in different TNE models.

For a detailed breakdown of sustainability indicators across each pillar—including metrics for mutual benefits, financial viability, partnership breadth and depth, effective leadership, and mutual trust and communication—please refer to Annex B. This annex provides specific indicators designed to guide the assessment and enhancement of TNE sustainability at both the developing and maturing stages of partnerships.

²⁶ Universities UK. (2023). Developing equitable TNE partnerships. Retrieved October 17, 2024, from <https://www.universitiesuk.ac.uk/universities-uk-international/insights-and-publications/uuki-insights/developing-equitable-tne-partnerships>

7.1 EGYPT

Country Profile

Population: 111 million
Median age: 24.3

Number of university students: 3.7 million in 2023-2022 (Ministry of Education expects the number to grow to 5.6 million by 2032)

Inbound tertiary students: 87,049 in 2022/23 (CAPMAS)
86,848 in 2023 (UNESCO estimate)

Outbound students: 69,371 in 2022 (UNESCO estimate)

Income per capita: \$4,295 in 2022

Domestic universities: 105
- 27 Public, 34 Private, 10 Technological universities
- 20 National Universities (Non-profit, state funding covers 60-40% of tuition)
- 6 universities founded through international agreements.
- IBCs: 8 (IBCs) across 4 IBC Hubs
- Technical and Vocational Education and Training (TVET) higher education institutes : 233

TNE tuition fees:
- For validation/joint/dual degrees offered by UK institutes: £800 to £5,000
- For IBCs/franchises about £6,500 to £13,500 for degrees at UK IBCs/franchises in Egypt

7.1.1 Macro environment

Demographic advantages

As one of the most populated Arab nations, Egypt possesses significant demographic advantages. With a population size of 111 million and a median age of 24.3, over half of the Egyptian population is under 25 years old.²⁷ Egypt has a large pool of potential university-age students. Egypt also attracts a large number of inbound students from Malaysia, Indonesia, Thailand, Nigeria, and Iraq.²⁸

Economic impact

The economic situation in Egypt has mixed effects on its TNE market. Factors like the country's relatively low income per capita and currency devaluation have made UK education less affordable, causing costs for Egyptian students pursuing a UK degree to increase two to three-fold. This economic uncertainty might deter students from considering foreign education, both abroad and through TNE options. However, the currency devaluation could also encourage more students to pursue their education within Egypt, potentially strengthening the domestic education market. In addition, despite economic challenges, Egypt maintains a robust flow of outbound students of 50,814 in 2021, suggesting a strong demand for higher education opportunities in foreign institutes.²⁹

7.1.2 TNE enrolments in Egypt

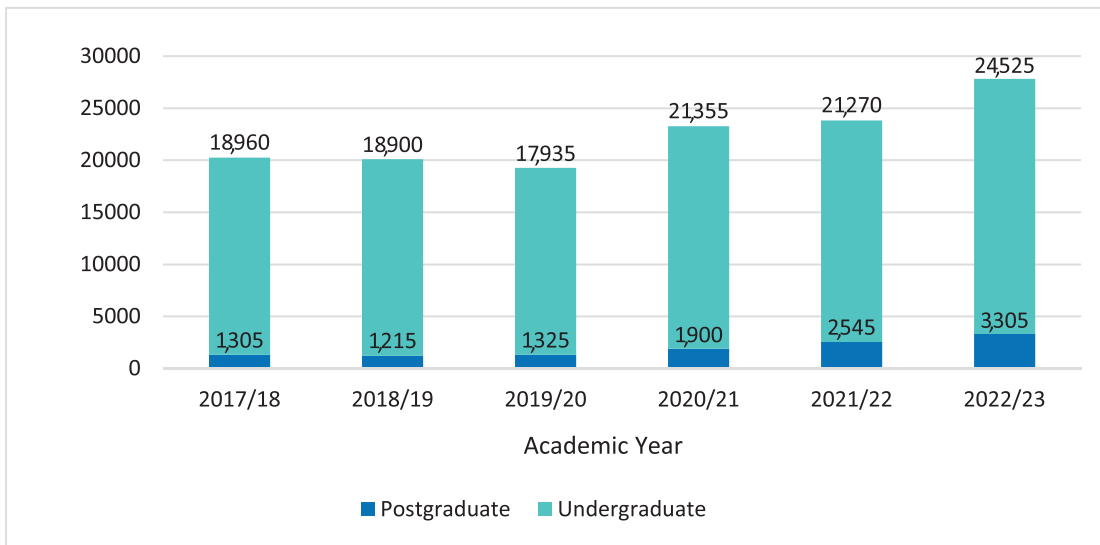
HESA enrolment data shows an upward trend in TNE enrolment in Egypt (see Figure 8). In terms of level of provision, the vast majority of UK TNE degrees in 2022/23 are offered at the undergraduate level (88%; 24,525 out of 27,830), indicating a healthy financial contribution to the higher education sector.

²⁷ Data for Egypt, Arab Rep., Lower middle income | Data (worldbank.org)

²⁸ UIS Statistics

²⁹ Global Flow of Tertiary-Level Students | UNESCO UIS

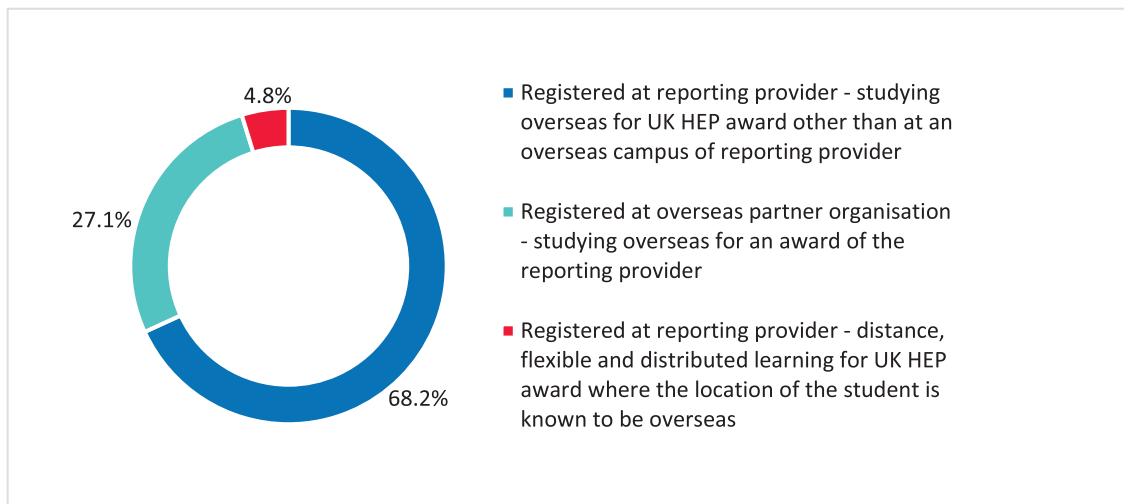
Figure 8. Overall postgraduate and undergraduate enrolments in Egypt between 2017 and 2023.



Source: HESA Aggregate Offshore Record. Data for 2018/19 and earlier excludes students registered with Oxford Brookes University.

Figure 9 suggests that the most common form of TNE degrees is joint/dual degree, validation or franchise represented by ‘Registered at reporting provider – studying overseas for UK HEP award other than at an overseas campus of reporting provider’ (68.2%) and ‘Registered at overseas partner organisation – studying overseas for an award of the reporting provider’ (27.1%). This could be due to the lower tuition costs for joint/dual, and validation degrees compared to franchised operations or IBCs. However, it is important to note that while the classification of HESA data enable differentiation between IBC vs non-IBC provision, it does not differentiate the TNE model types, in particular between dual degrees vs franchise degrees.

Figure 9. UK TNE in Egypt by type of provision 2022-23.



Source: HESA Aggregate Offshore Record (2022/2023).

7.1.3 Policy and regulatory environment

In Egypt, higher education institutions fall under the governance of the Ministry of Higher Education and Scientific Research (MOHESR), overseen by four executive bodies: the Supreme Council of Universities, the Supreme Council of Private Universities, the Council of Foreign Universities, and the Supreme Council of Technical Institutes. Accreditation of universities and educational programmes is conducted by the National Authority for Quality Assurance and Accreditation of Education (NAQAAE), reporting to the office of the Prime Minister.

MOHESR encourages transnational collaboration as TNE operations closely align with its national strategy for higher education for 2030. These strategic targets set out by the Ministry include increasing tertiary enrolment to 45%, accrediting all Egyptian institutions through NAQAAE, doubling international student numbers by 2030, aiming for ten Egyptian institutions in the top 500 world rankings, reducing graduate unemployment, and fostering graduate entrepreneurship. TNE operations resonate with the government's goals to enhance student access, employability, education quality, and university reputation.

Additionally, the MOHESR's national strategy emphasises internationalisation and sustainability.³⁰ Within this strategy, internationalisation aims to facilitate the mobility of Egyptian students across borders, harnessing scientific advancements from foreign universities. The strategy further emphasises sustainability through resource optimisation and waste reduction, ensuring the Ministry's efforts align with long-term economic, social, and environmental viability. In this context, TNE provision and institutional partnerships play a key role in optimising resources by pooling expertise and sharing infrastructure.

Legislation for private universities

In line with this national strategy, Egypt has introduced a series of legislations to promote TNE. The legislation in 2018 was created to encourage collaboration between foreign universities and

the private sector. Law no. 162 of 2018 mandated MOHESR to facilitate the granting of degrees from IBCs within Egypt and appointed advisors to resolve issues within these institutions. Since then, eight IBCs have been established in the New Administrative Capital territory. Egypt has made significant efforts to attract prestigious foreign universities to its New Administrative Capital. These include:

1. Prince Edward University and Ryerson University branches hosted by the Canadian Universities Foundation in Egypt.
2. Coventry University branch hosted by the Foundation for International Knowledge Universities.
3. University of Hertfordshire branch hosted by the Global Foundation.
4. University of London, London School of Economics and Central Lancashire branches hosted by the European Universities Foundation in Egypt.
5. The Portuguese Nova University hosted by the International Knowledge Universities Foundation.

Legislation for public universities

Subsequent laws around 2022 and 2023 encouraged partnerships between foreign universities and national universities, signalling the government's commitment to expanding TNE opportunities.³¹ However, some believed that these laws have also led to competition between the private and public sectors in hosting IBCs.

Notable collaborations between national universities and UK universities include the dual degree partnerships between the University of East London and Ain Shams in 2018, the collaboration between Galala University partnered with Arizona State University in 2022, and the partnership between Alamein International University and the University of Louisville in the same year.

³⁰ National Strategy for Higher Education and Scientific Research 2030 (sis.gov.eg)

³¹ Transnational Education in Egypt. https://opportunities-insight.britishcouncil.org/sites/siem/files/field/file/news/TNE_in_Egypt_2023.pdf

Other examples of successful programmes cited are:

- University of Manchester partnership with Mansoura University's Faculty of Medicine
- University of Manchester partnership with Alexandria University's Faculty of Medicine
- Arab Academy for Science, Technology and Maritime Transport (AASTMT) partnership with University of Northampton and University of Central Lancashire (UCLan) in engineering
- AASTMT partnership with University of Northampton in Business Information Systems
- Outside UK, there is also Georgia State University's Joint Programme at Cairo University's Faculty of Commerce.

It is important to note, however, that MOHESR is also planning to allow public universities to host IBC models in the future, potentially reducing costs by utilising existing university premises, as consistent with its strategic focus on sustainability.

Despite supportive policy initiatives, TNE operations in Egypt face complex regulatory processes. These bureaucratic procedures can be time-consuming, adding administrative burdens to collaboration efforts. Changes in government policies or priorities may further complicate the regulatory environment, leading to uncertainty and challenges for foreign universities navigating partnership initiatives.

7.1.4 Challenges and opportunities for UK universities

The section will explore the competition faced by UK universities in Egypt from institutions in the US, Canada, Germany, and Japan. They will also address challenges such as qualification recognition and high living costs for UK students, while comparing these with other countries. Finally, the discussion will highlight obstacles and opportunities in research collaboration, proposing a strategic roadmap to enhance TNE partnerships and secure funding.

Competitiveness of UK universities

The key competitors for UK universities are from the US, Canada, Germany, and Japan. The American University in Cairo (AUC), founded in 1919, is a prestigious private research university accredited in the US. It offers a liberal arts education and a wide range of undergraduate, graduate, and professional degrees. AUC is Egypt's foremost English-language institution. Canada also has a significant presence. The Universities of Canada IBC, housing the University of Prince Edward Island and Toronto Metropolitan University, recently forged a partnership with technology provider D2L. Seneca College has announced plans to establish two campuses in Cairo.²³

The German International University (GIU) offers German bachelor, master, and PhD degrees across various subjects with English as the teaching language in the new Administrative Capital of Egypt.³³

The Egypt-Japan University of Science and Technology offers validated degrees from 15 Japanese higher education institutions. In addition, the Japanese Supporting University Consortium (JSUC) is collaborating with the Egyptian Ministry of Higher Education (MOHE) to establish a programme for students to study and conduct their research in Japan with partner universities for a period of six-nine months.

Interviews conducted with students and university staff show that Egyptian students are motivated to study at UK institutes as they offer an education from the British system, which is viewed as strong and shorter in duration compared to other systems. Students mentioned that UK universities have a more focused curriculum. Unlike the American system, which includes a general education component, the UK system allows students to concentrate on their major subjects. Additionally, a staff member at an IBC noted that some students prefer IBCs over foreign institutes that operate solely in Egypt (such as

²² 'Seneca and CIRA Education sign MoU to open campuses in Cairo.' Seneca Polytechnic News.

<https://www.senecapolytechnic.ca/news-and-events/media-releases/2023/seneca-and-cira-education-sign-mou-to-open-campus-in-cairo.html>

³³ German International University, <https://www.giu-uni.de/>

the American University of Cairo) or universities offering programmes through franchise agreements with foreign institutions. This preference stems from the belief that studying at an IBC of a UK university is similar to studying in the UK itself. This perception suggests that such an education may offer better opportunities for future study or work abroad.

However, both policymakers and students interviewed pointed out that the high living expenses in the UK make it less appealing for students to consider moving there to further their study or find work in the future. Germany, on the other hand, is identified as a country offering more opportunities for work and postgraduate studies, along with lower living costs. When comparing living costs in the UK to those in Egypt using the price level index of these countries, we observe that the UK's prices are higher than in Germany but lower than in Canada, Japan and the US.

Developing research collaboration opportunities

While enhancing research capacity to create innovative solutions for global problems is a key promise of sustainable TNE partnerships, interviews with senior administrators in UK institutions revealed that accessing research funds remains a major obstacle. Foreign institutes and IBCs in Egypt are not eligible for government funding. The main funding for research comes from the UK partner institution, and this can lead to limited funding availability for the branch campus in Egypt. One TNE director noted that research development often takes a backseat to increasing student recruitment and balancing budgets.

On the Egyptian side, a faculty member in Egypt highlighted challenges in promoting transnational education for postgraduate research students, emphasising the difficulty in securing funding for studies in the UK. They stressed the importance of research grants and fully funded packages to attract students to research collaborations and suggest that this could be addressed through sustainable development initiatives.

To address further issues in TNE models, a senior member at a UK institute suggests integrating research components more deeply. This approach involves building networks not only with the government but also with local businesses and industries. Universities may need to seek alternative sources of support for research development. Additionally, formal processes and funding mechanisms are necessary to support transnational research collaboration between main and satellite campuses.

A strategic roadmap for research development in TNE partnerships may take the following form:

1. Starting with a dual/joint degree or franchise model: Begin partnerships with a basic franchise model for educational programmes. This establishes a foundational academic relationship before delving into research collaborations.
2. Building research over time: After a couple of years of operational partnership, shift focus towards building research collaborations. Establish formal processes to integrate academics from both sides, and set up funding mechanisms to support transnational research collaboration.
3. Funding mechanisms: Utilise internal funding where available to kickstart research initiatives. Actively seek external funding sources, such as UK-based opportunities that include international partners, and other avenues include funding related to SDGs and industry partnerships.
4. Collaborating with private institutions: Focus on applied research and knowledge exchange, leveraging the host university's ties with industry to access industry funding and participate in the knowledge exchange framework. Align research efforts with the strengths of the universities, leveraging their expertise in applied research and knowledge exchange. This strategic alignment helps access diverse funding opportunities and strengthens the partnership's academic and industrial impacts.

7.1.5 Case study 1. University of East London (UEL) and Ain Shams

1 Case Study

The partnership between the University of East London (UEL) and Ain Shams University, initiated in 2018, offers Egyptian students the opportunity to pursue bachelor's degrees in various engineering professions at UEL. Enrolled students in the interdisciplinary engineering programmes receive certificates from both UEL and Ain Shams University.

UEL has identified Egypt as an important 'transnational education gateway' to the MENA region, given its young population and the Egyptian government's Vision 2030 plan to expand access to higher education.³⁴ The collaboration between UEL and Ain Shams is considered to be part of a broader initiative to elevate the standards of Egyptian universities and institutes, thereby enhancing educational opportunities for students in the region.

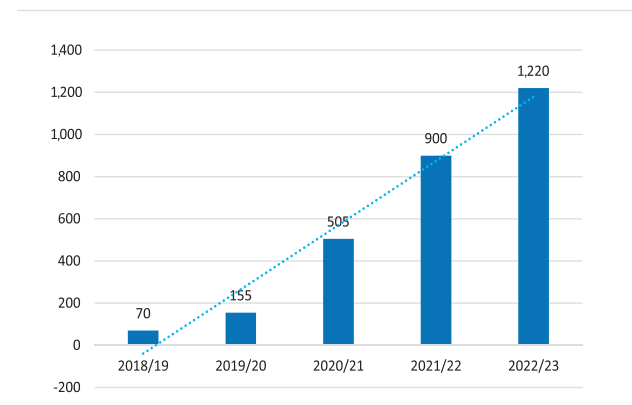
The UEL-Ain Shams partnership demonstrates financial viability, while providing mutual benefits to a wide range of stakeholders, including students, faculty, staff, the partnering institutes, the local community, and the country.

1. Financial viability

Student enrolment is the key to financial viability for TNE operations. Initially starting with a few programmes in the School of Architecture, Computing, and Engineering, the partnership now offers 11 programmes. Since 2018, UEL's enrolment has grown from 70 to 900 students. To increase enrolments, UEL has focused on developing its reputation, forging partnerships with different institutions, and expanding career-focused degree programmes. In terms of reputation development, Ain Shams was also a strategic partner for UEL due to its reputation as one of the top universities as well as being the largest university in Egypt. This partnership has increased UEL's visibility in the region. The admission to the dual degree

of this public university is competitive, allowing UEL to enrol top students. This selective process strengthens the base of accomplished alumni, further enhancing the university's future reputation. Additionally, at the time of this research, UEL is also planning to operate an IBC on Ain Shams' campus, further providing students with private credit options.

Figure 10. University of East London UK TNE undergraduate enrolment in Egypt 2018-2023.



Source: HESA Aggregate Offshore Record (2022/2023).

For partnership expansion, in 2022, UEL further expanded its presence in Egypt by signing a three-party agreement with Alexandria University and the West Ham United Foundation, offering a unique degree programme in sports coaching and performance. This aligns with UEL's mission to enhance employability through industry partnerships. UEL has developed partnerships with Cairo University and European Universities in Egypt (EUE), which currently hosts the University of London and the University of Central Lancashire. In 2024, UEL opened a new branch at EUE, offering 16 new degree courses in fields such as animation, graphic design, fashion design, film, media and communication, media production, and fine arts.³⁵

³⁴ 'UEL expands global reach with Egyptian partnership.' University of East London (UEL) News. <https://uel.ac.uk/about-uel/news/2024/april/uel-expands-global-reach-egyptian-partnership>

³⁵ 'UEL expands global reach with Egyptian partnership.'

2. Mutual benefits

In addition to financial viability, a senior leader at UEL highlighted the university's preference for transformative partnerships over transactional ones, aiming for collaborations that extend beyond course franchising. These partnerships encompass enhancing students' employability, education quality, and research collaborations.

Benefits for students

From the students' point of view, the dual degree programme offers valuable opportunities to study and work abroad. One engineering student said, 'Some of us have received internships abroad and this is a huge opportunity. Some of my classmates travelled to the UK or other countries for internships, training, and master's degrees. Another engineering student who participated in an exchange programme in UEL commented, the exchange focused not only on 'academic content' but also 'exploring a new country' and 'learning a new culture'. 'Although the exchange programme was brief, only 15 days', the student said, 'the instructors covered the necessary content.' As a result, 'When I returned to Egypt, I applied for an internship at [a major tech company] and got accepted.' Students concurred that the international degree and experience enhance their employability and mobility, as one student remarked, 'We can find jobs internationally because we are graduates from two universities, Ain Shams and UEL.'

For students, the dual degree at Ain Shams also offers a more affordable way to access UK education. For engineering degrees for international students, a year can cost between £20,000 to £35,000, whereas an undergraduate degree at an IBC/franchise programme costs about £13,500 per year. The dual degree at Ain Shams costs about £2,329 at the time of this study, making it the most affordable choice for students in the country. Similar to most TNE operations in Egypt, tuition fees are paid partly in Egyptian pounds and partly in sterling pounds, as a way to relieve the pressure caused by the currency devaluation.

Benefits for the partnering institutes

For Ain Shams, the partnership facilitates student mobility and enhances quality. Similar

to UEL, Ain Shams pursued partnerships with multiple international universities. It offers joint degree programmes in Engineering with Clausthal University in Germany and Mediterranean University in Italy. They also offered dual degrees in Business with University of Poitiers in France. As one senior member in the University remarked, Ain Shams sees the need for its degrees to be accredited by other European bodies, as this will enhance students' opportunities to work abroad.

University faculty members we interviewed believe that the partnership has improved educational quality through the UK quality assurance process. However, they noted that programme mapping and harmonisation were key challenges at the beginning of the partnership. While over 90% of the courses at the two universities matched, aligning the structure and sequence of these courses had been more difficult. The UK system tends to have a fixed set of modules that students must take within an academic year. The Egyptian counterpart will need to adapt this structure to meet accreditation requirements.

A senior faculty member commented that the key difference between the UK and the Egyptian system lies in assessment preparation. In the Egyptian system, assessments can be developed as courses progress, while in the UK system, assessments and curriculum need to be developed before the semester and approved by external reviewers. The faculty member indicated that this created administrative burdens for staff initially, yet over time, faculty saw this as quality enhancement.

In terms of assessment enhancement, one student who was transferred to a dual degree programme from a local university commented that the dual degree programme has more practical assessments. The assessment is 'closer to the real-world experience...' said the student, 'I have to work under pressure, manage time, and work in teams'. In addition, 'doing internships also provides more practical experience'.

Contribution to sustainability goals

This partnership further presents opportunities to align to broader sustainability objectives. Specifically, both institutions align their visions with SDGs. UEL, for example, emphasises sustainability through initiatives like the Royal Dock Centre for Sustainability and the Sustainable Cities Festival, which focus on addressing environmental challenges, fostering community engagement, and promoting sustainable urban development.³⁶ Similarly, Ain Shams aligns its strategic goals to SDGs, as consistent with Egypt Vision 2023.³⁷ A senior member from Ain Shams pointed out that this alignment offers abundant opportunities for joint research endeavours.

In conclusion, the partnership between UEL and Ain Shams not only demonstrates financial viability but also enhances educational quality, employability and mobility for students, exemplifying a successful and transformative collaboration.

³⁶ 'UEL expands global reach with Egyptian partnership.'; 'Royal Docks Centre for Sustainability.' University of East London (UEL) Partners.
<https://uel.ac.uk/partners/royal-docks-centre-sustainability>

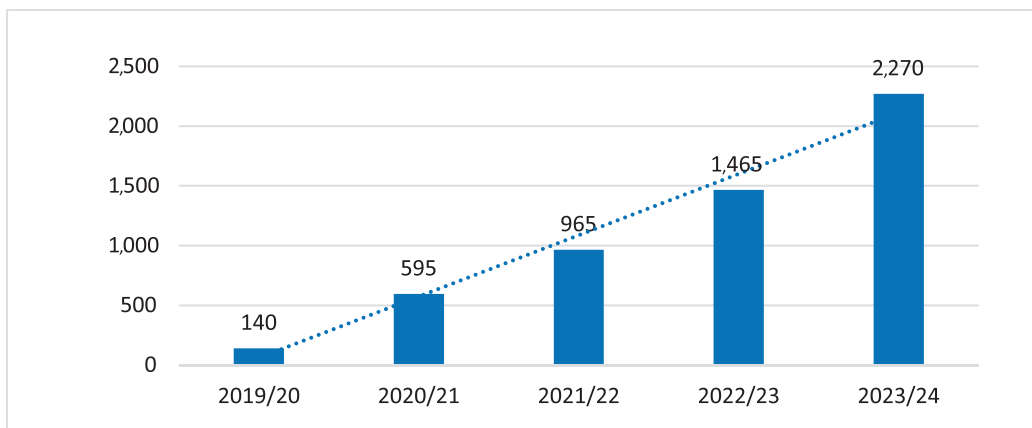
³⁷ 'Sustainability Report 2023.' Ain Shams University.<https://www.asu.edu.eg/pdfViewer/28862>

7.1.6 Case study 2. University of Hertfordshire hosted by Global Academic Foundation (UH-GAF)

The University of Hertfordshire, operating through the Global Academic Foundation (GAF) in Egypt since 2019, is the one of the first British IBCs established in the country along with Coventry. Founded under a presidential decree, the campus adopted a partnership model involving a funder and an investor, with the UK university collaborating with a local partner in Egypt to develop infrastructure and cover operational expenses, in return for a portion of the revenue. The campus is located in the New Administrative Capital of Egypt. Operating under the MOHESR, UH-GAF emphasises its commitment to high-quality education and enhancing employability for graduates in both Egyptian and international markets.

Early challenges they faced included setbacks from COVID-19 and currency devaluation, which impacted not only affordability of the education but also the campus's ability to hire quality staff. Despite these challenges, UH-GAF has seen substantial growth in enrolments and programme expansion. The sustainability of UH-GAF is characterised by its commitment to expanding education and research activities and effective operational management as well as effective leadership and people management.

Figure 11. UK TNE undergraduate enrolments in Egypt 2019-2024.



Source: HESA Aggregate Offshore Record and University of Hertfordshire data (2023/24).

The salient features of sustainability demonstrated by UH-GAF are:

1. Partnership breadth and depth

UH-GAF has demonstrated sustainability through diverse academic programme offerings, concrete measures for developing research capacity, operational alignment, and resource management.

In terms of programme offerings, UH-GAF has six schools including Business, Creative Arts, Humanities, Engineering and Computer Science, Health (Physiotherapy), and Life & Medical Sciences. Since inception, the schools have expanded their degree programme offering from 13 to 18 programmes. The comprehensive offerings have attracted students across various disciplines. One student, who aspires to become a sports physiologist, pointed out, 'UH-GAF offers majors not available in many universities in Egypt', and 'getting a degree from a UK university will enable [him] to work in the sports field internationally.' Similarly, another student said she chose UH-GAF as it offered a major in the area of artificial intelligence in computer science, which she could not find in other universities.

Beyond the comprehensive programmes, students also highlighted the value of the international aspects of their learning experience, as well as the focus on developing creative and critical thinking skills. A student majoring in mass communication said, 'studying in a British system allows me to see what international professionals do, which broadens my understanding.' Commenting on the learning activities, another student said the activities have helped them 'develop better communication skills and a mindset geared towards thinking outside the box.'

Additionally, the University offers various co-curricular and extracurricular activities such as student clubs and organisations, community service initiatives, mental health support, and sports teams and athletic activities. One of the leaders of the student union noted that these activities have helped

her develop team management, negotiation, and leadership skills.

To enhance international student exchange, UH-GAF students also have the opportunity to study for up to a year in the UK while paying tuition fees at UH-GAF. Meanwhile, efforts have been made to encourage UK students to visit Egypt. Students we interviewed reported that they welcomed these opportunities, although affordability remains a prohibitive factor for some. They also mentioned that while they have seen students from the UK visiting, they would like to see these programmes flourish with more UK students coming to study a semester in Egypt.

In terms of research capacity development, many of the academic staff at UH-GAF are PhD holders with research interests and publications. The University's strategic goals in research include attracting academic staff with strong research profiles, supporting them with dedicated research time, as well as showcasing staff accomplishments and ongoing research on various platforms. UH-GAF also focus on developing future researchers, encouraging students at senior or postgraduate levels to study a semester in the UK to work on their final year research project. However, one university leader noted that achieving collaborative research exchanges between the UK and Egypt campuses will require establishing more channels and working groups, as well as fostering mutual respect and understanding.

Finally, to improve operational efficiency, UH-GAF implemented the same student administrative and learning management systems as the main UK campus, adopting its best practices. However, besides system integration, as a senior University member noted, processes must ensure smooth coordination between the branch campus and the home institution in curriculum delivery, grading, moderation, and other administrative tasks. Building trust and communication channels is also crucial for this coordination.

2. Open communication

Open communication is fundamental to successful partnerships, relying on strong, adaptable leadership, clear communication, and mutual respect. Implementing education at the IBC requires adapting course materials from the UK campus, which could potentially lead to mistrust among academics who may view it as compromising the degree's integrity. A senior member in UH-GAF explained that building communication channels and linking deans and programme leaders between institutions together have helped to support effective collaboration, ensuring trust and cooperation.

Effective communication with students and parents is another key area. Senior administrators at this IBC cited the importance of being responsive to students' needs and managing parents' expectations. These include providing well-equipped learning facilities, as well as addressing challenges related to transportation and food options at the university in the new capital of Egypt.

3. Effective leadership and people management

As one university leader pointed out, unlike universities partnered with established institutions, UH-GAF needed to spend more time establishing itself in the higher education

market in Egypt. While UH-GAF could implement programmes offered in the UK campus without partner institute limitations, the Ministry's approval process, requiring extensive paperwork and interactions, impacted lead time and operational planning. Effective leadership is therefore crucial in driving this development while managing stakeholder expectations.

UH-GAF has senior leaders from both the UK and Egypt, ensuring local expertise and the ability to manage diverse stakeholder agendas. At the outset, this involves negotiating with investors, university boards, and regulatory bodies. Understanding the system and maintaining focus on partnership goals is vital for successful negotiations and long-term sustainability.

A university leader pointed out the importance of managing investors' and board members' expectations. On this aspect, leaders must balance board expectations while securing investor support for infrastructure developments. In addition, leaders in this context need to maintain proactively and consistently positive relationships with government authorities to ensure ongoing support and approval.

7.2 QATAR

Country Profile

Population: 2.7 million
Median age: 34

Number of university students: 41,000 in 2020/21

Inbound university students: around 15,000 non-nationals (including expatriates) in 2020/21
Inbound tertiary students: 18,762 in 2023 (UNESCO estimate)

Outbound students: 6,575 in 2022 (UNESCO estimate)

Income per capita: \$87,480 in 2022

32 Higher education institutes (HEIs)

-9 public HEIs

-5 Military HEIs

-8 HEIs supported by Qatar Foundation for Education Science and Community and Development

-10 Private HEIs

TNE tuition fees for undergraduate degrees offered by UK institutes range from £15,480 to £19,580 - mostly in IBCs or franchise arrange

7.2.1 Macro environment

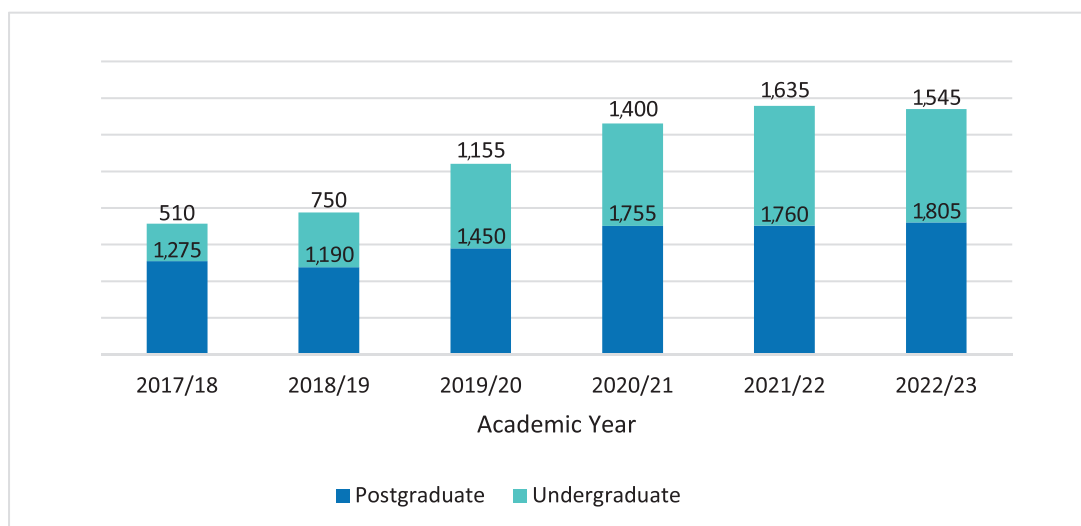
Qatar, with a small population of 2.7 million and a high per capita income of £68,870, presents both advantages and disadvantages for TNE development. The limited population size restricts the potential student pool. Additionally, past challenges such as the 2017-2021 political blockade and the COVID-19 pandemic have shown that financial viability is subject to external factors. However, the relatively high per capita income enables the growth of TNE operations, in particular, IBCs and international and franchise arrangements. The country also has good potential to attract international students.

Over the past two decades, Qatar has strategically pursued a higher international profile, primarily through cultural diplomacy and strategic investments. Notably, the country's influence has grown through initiatives such as the Al Jazeera media network and its investments in sports, including hosting the 2022 FIFA World Cup. Furthermore, Qatar has attracted major technological investments, such as Microsoft's establishment of a datacentre region in 2022, indicating its commitment to developing an innovation-driven digital sector. Partnerships with organisations like the Iberdrola Group also demonstrate Qatar's dedication to advancing digital utility and nurturing local talent through skills development programmes. Education and research are integral to Qatar's long-term vision, as evidenced by initiatives led by the Qatar Foundation, fostering a knowledge-based, sustainable economy through various cultural and educational institutions like Qatar Museums, the Doha Film Institute, and the Qatar Philharmonic Orchestra.

7.2.2 TNE enrolments in Qatar

The data in Figure 12 shows that UK TNE in Qatar has steadily increased over the past five years, with a notable 33 percent rise in the 2019/20 academic year compared to 2018/19. In 2022/23, UK TNE degrees in Qatar were offered slightly more at the postgraduate level, with 54% (1,805 out of 3,350) of enrolments, compared to the undergraduate level. While undergraduate enrolments typically contribute more financially to the higher education sector, the strong number of postgraduate enrolments suggests a growing market capacity to expand research initiatives and an increasing ability of the country to deliver advanced education.

Figure 12. Overall UK TNE postgraduate and undergraduate enrolments in Qatar 2017-2023.

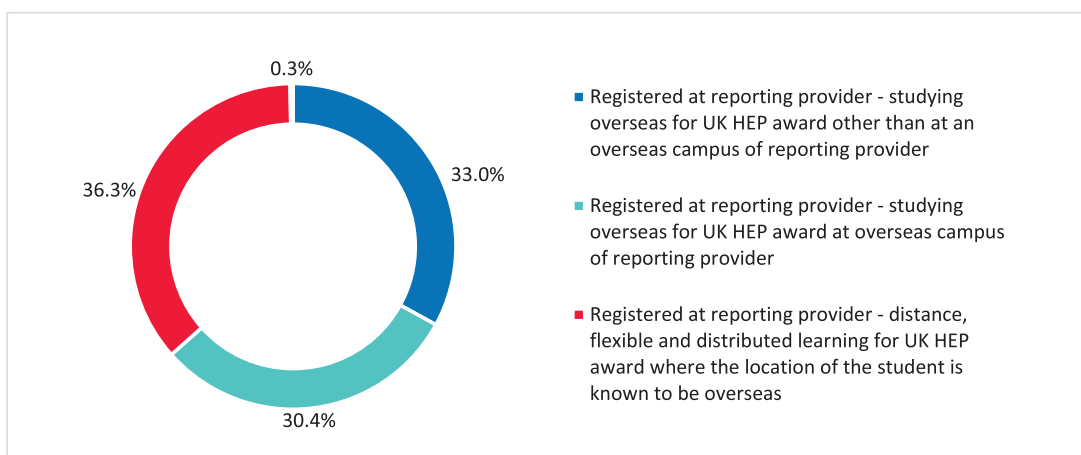


Source: HESA Aggregate Offshore Record. Data for 2018/19 and earlier excludes students registered with Oxford Brookes University.

Figure 13 shows that substantial TNE enrolments in Qatar are through distance, online learning, as indicated by ‘Registered at reporting provider - distance, flexible and distributed learning for UK HEP award where the location of the student is known to be overseas’ (36.3%). This is followed by joint, dual, validation, or franchise operations, as indicated by ‘studying overseas for UK HEP award other than at an overseas campus of reporting provider’ (33%).

Finally, a substantial portion studied at IBCs, as indicated by ‘Registered at reporting provider - studying overseas for UK HEP award at overseas campus of reporting provider’ (30.4%). A very small number of enrolments are attributed to ‘Registered at overseas partner organisation - studying overseas for an award of the reporting provider’ (0.3%).

Figure 13. UK TNE in Qatar by type of provision (2022/23).



Source: HESA Aggregate Offshore Record Academic year (2022/23).

7.2.3 Policy and regulatory environment

Qatar's ambition to establish itself as a regional education hub favours TNE development. The country's policy environment, guided by Qatar's National Vision 2030,³⁸ aims to create a world-class educational system aligned with international standards. Its vision is closely aligned with the UN's SDGs, seeking to balance economic growth with human and environmental development, ensuring sustainable progress for the country. This commitment is reflected in substantial investment in education, with over 13% of GDP allocated to educational development, including higher education. Qatar's focus on expanding educational facilities, promoting Technical and Vocational Education and Training (TVET), and addressing special educational needs and disabilities students further supports TNE initiatives.

The Ministry of Education and Higher Education (MoEHE) oversees higher education institutions with international affiliations, ensuring compliance with standards for curricula, faculty qualifications, and operational guidelines. The regulatory framework for private educational institutions, including those engaged in TNE partnerships, is governed by Law No. 23 of 2015. This law sets licensing requirements and operational standards, emphasising quality assurance and governance for private schools and other educational entities. By establishing robust policies and infrastructure, Qatar creates an enabling environment for international collaborations and the growth of TNE.

In 2022, Qatar and the UK signed a Memorandum of Understanding (MoU) in London to bolster educational ties, aiming to increase understanding and knowledge exchange by expanding educational partnerships.³⁹ The MoU seeks to deepen collaboration in various sectors including regional security, trade, humanitarian aid, energy, science, health, and education, showcasing their shared dedication to tackling global issues and promoting mutual development.

Employing a hybrid glocalisation strategy, Qatar has opened its higher education (HE) sector to global markets, encouraging the establishment of international branch or satellite campuses of foreign universities.⁴⁰ This strategy reduces reliance on government funding and aligns with

Qatar's goal to shift 20% of the workforce in the public sector to the private sector. While the government may provide initial support such as land and scholarships, these universities are expected to become financially self-sufficient over time. Partnership with reputable public or private institutions is particularly encouraged, as it provides credibility and quality assurance. Examples include partnerships between the Qatar Foundation and reputable American universities.

Balance between autonomy and quality

Qatar higher education policy includes legislation granting autonomy to universities and their governing boards, alongside monitoring and control mechanisms to ensure programme quality and healthy demand for courses. There is a focus on providing high-quality higher education programmes in line with global standards and sustainable development goals. Measures such as the formation of the National Quality Assurance Committee and the introduction of the National Qualification Framework (NQF) are aimed at ensuring the quality and relevance of education offerings. The diversification of programmes and degrees by both national universities and private sector partners reflects a commitment to meeting the demands of students and the knowledge economy. In addition, the ministry has increased the standard for private/foreign universities - now requiring a top 300 ranking instead of top 600. From the perspectives of university operators, however, this can also pose challenges, which will be discussed in the following section.

Ensuring healthy university enrolments

Emphasis is placed on attracting inbound students through measures like relaxing visa requirements, contributing to increased enrolment and fostering long-term viability in the education sector. The Qatari government has launched initiatives like the 'Study in Qatar' programme aiming to attract international students to Qatar, whilst contributing to the diversity of the education landscape and fostering global connections. These initiatives include making it easier for international students to obtain visas, allowing them to work part-time while studying, and providing opportunities for post-graduation employment.⁴¹

³⁸ Qatar National Vision 2030 (npc.qa)

³⁹ 'Joint Communiqué: United Kingdom – The State of Qatar.' UK Government. <https://www.gov.uk/government/news/joint-communique-united-kingdom-the-state-of-qatar>

⁴⁰ 'An Assessment of Qatar Higher Education and UK - Qatar Areas of Collaboration.' British Council.

⁴¹ 'An Assessment of Qatar Higher Education and UK - Qatar Areas of Collaboration.'

7.2.4 Challenges and opportunities for UK universities

Competition from foreign universities, especially American institutions, presents significant challenges for UK universities in Qatar. The Qatar Foundation supports many American universities, including Georgetown University's School of Foreign Service, Northwestern University's Medill School of Journalism, Virginia Commonwealth University's School of the Arts, Carnegie Mellon University, and Cornell University's Weill Cornell Medicine. Additionally, Canadian and French universities, such as the University of Calgary and HEC Paris, have a presence. Universities, such as the high-ranked National University of Malaysia established in 2022 starting with three faculties including Business Management, Information Technology and Biology as well as the collaboration between Mohammed bin Ghanem Maritime Academy and Piri Reis University in Turkey, also have contributed to the competitive landscape.

In addition to external challenges, our interviews with UK university and government stakeholders identified further barriers for UK universities. First, the lack of an easily accessible database on student enrolment and higher education statistics makes it difficult for foreign universities interested in developing TNE in Qatar to conduct market viability studies or align their offerings with local market needs. This also indirectly impacts programme development, marketing, and recruitment efforts of foreign universities.

The second barrier relates to qualification recognition. Qatar's policy does not recognise chartered memberships from organisations like the Royal Institute of Chartered Surveyors and Association of Chartered Certified Accountants as equivalent to degrees for work visa purposes. This can indirectly impact educational offerings by UK universities. But the UK Department for Business and Trade (DBT) is currently working with the government to eliminate this barrier.

Third, navigating the regulatory framework can still pose challenges for foreign universities as Qatar's higher education landscape has undergone significant changes in recent years. For existing universities and universities planning to enter the market, the top 300 threshold set by the government could be seen as a threat to their continuing operation or entering the market.

In addition, for programme accreditation, some UK university administrators have found that the accreditation body sometimes takes a strict view of the subjects that can be taught, leading to challenges in introducing new programmes. On this view, approval for programmes may be withheld if the programme titles do not fit into specific objectives, even if they align with Qatar's development goals, or if it may help with diversifying the economy. Therefore, foreign universities need to focus on meeting national requirements when launching new programmes. Additionally, continuous communication, negotiation, and stakeholder engagement are needed to ensure that diversifying course offerings and newer course offerings are able to be launched.

Fourth, from UK faculty or administrators' viewpoints, students in Qatar tend to seek more support compared to students in the UK. Effective communication and trust-building between the home campus and the branch campus in Qatar are needed to address cultural integration issues. Staff training and awareness initiatives are also needed to support staff in navigating differences in norms, practices, and communication styles.

TVET and STEM development

The Ministry of Education and Higher Education (MoEHE) is actively promoting STEM (Science, Technology, Engineering, and Mathematics) and TVET (Technical and Vocational Education and Training) to enhance technical and vocational education. There are efforts to increase technical and vocational schools, integrate STEM subjects into basic curricula, and encourage TVET. This initiative aims to equip students with scientific and practical skills, enabling them to enrol in top universities or use advanced professional skills to meet societal needs. Advancing STEM and TVET education aligns with Qatar's third National Development Strategy (2024-2030), which focuses on increasing skilled workers and graduates. One of the successful examples of TVET noted by an interviewee of this research is the University of Lancashire's successful TVET collaboration with the Policy Academy, which will be examined further in this report.

7.2.5 Case study 3. University of Northumbria and Qatar Finance and Business Academy (QFBA)

3

Case Study

The collaboration between QFBA and Northumbria University began in 2016, focusing on enhancing the skills and knowledge of professionals in Qatar's business sector. While the partnership began with QFBA identifying multiple UK universities for potential collaboration via a feasibility study, it was the alumni connection that ultimately sealed its partnership with Northumbria University.⁴² Driven by mutual interests and a shared ambition for growth, this partnership aims to align with Qatar Vision 2030 and transition the country into a knowledge-based economy.

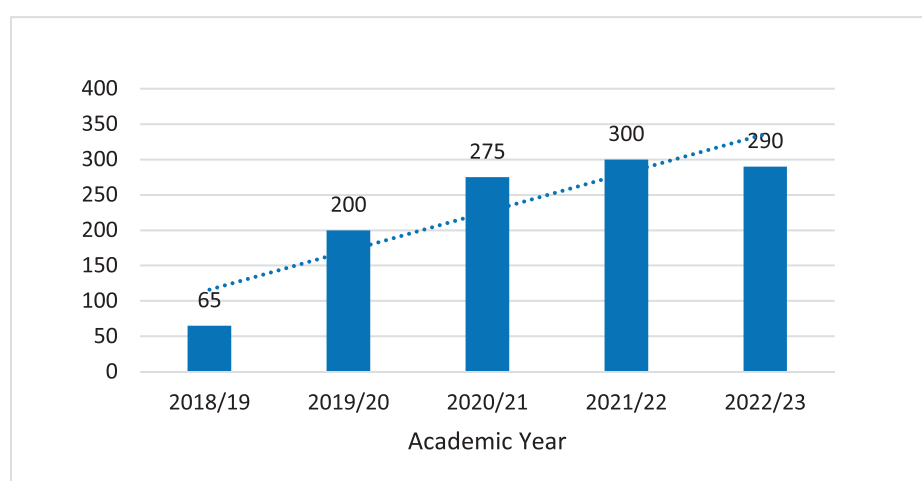
QFBA offers undergraduate degrees in Accounting, Finance, and related disciplines, and expanded to postgraduate programmes in September 2023. Currently, it delivers three undergraduate and three postgraduate programmes to 600 students. These programmes include BSc (Hons) Finance and Investment Management, BA (Hons) International Banking and Finance, BA (Hons) Accounting and Finance, MSc Finance, MSc Digital Marketing, and MSc Business Analytics.

Under the franchise agreement, the Qatari Ministry of Education requires Northumbria to teach 25% of the credits for each programme, usually translating to one module per level. This mandate necessitates the presence of university staff at QFBA.

Challenges in the initial stages included setting up the campus and meeting regulatory requirements from both Qatar's Ministry of Education and Northumbria University, aligning the curriculum with local needs, and mitigating concerns about programme quality and faculty qualifications.

The following will look at the sustainability of this partnership as evident in terms of financial viability, mutual benefits as well as open communication.

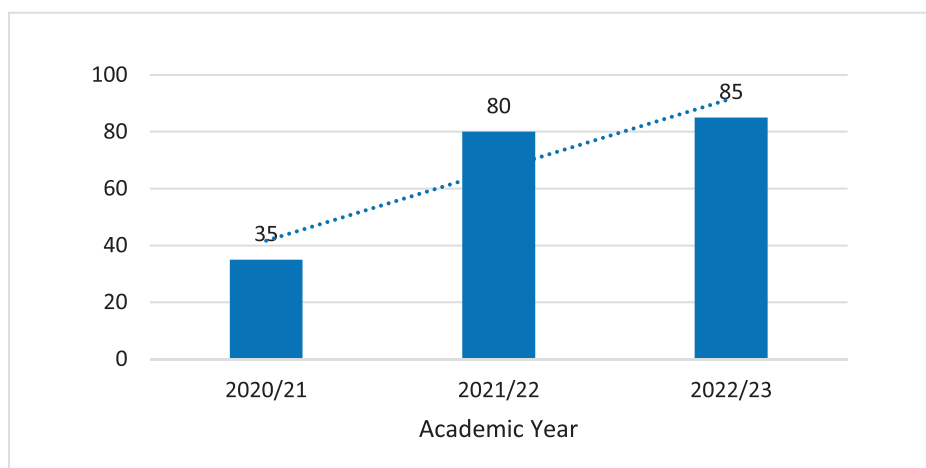
Figure 14. University of Northumbria at Newcastle UK TNE undergraduate enrolments in Qatar 2018-2023.



Source: HESA Aggregate Offshore Record.

⁴² Alyafei, K., & Malkawi, A. H. (2024). The role of social networks in the formation of transnational higher education partnership: a case study of a British university and a Qatari education institute. *Compare a Journal of Comparative and International Education*, 1–17. <https://doi.org/10.1080/03057925.2024.2307555>

Figure 15. University of Northumbria at Newcastle UK TNE postgraduate enrolments in Qatar 2020-2023.



Source: HESA Aggregate Offshore Record Academic year (2022/23).

1. Financial viability

Financial viability for universities is closely tied to their student growth strategies, which ensure a steady growth of students to sustain and expand operations. Unlike their counterparts in Egypt, universities in Qatar have a more diverse student body. Students at QFBA-Northumbria typically show a stronger global orientation. The benefits brought by British institutes therefore go beyond internationalising the education experience. Many students plan to stay in Qatar to work after graduation. As one non-Qatari student noted, 'Being in Qatar has strengthened my Arabic language skills, which is a huge plus for me in the regional job market.' While exposure to international and diverse cultures is valued, it is secondary to the primary goal of gaining work experience. For these reasons, QFBA-Northumbria's growth strategies involve:

Providing relevant, hands-on learning and internship opportunities

QFBA-Northumbria ensures students gain practical experience and industry connections. QFBA-Northumbria has localised its curriculum by forming partnerships with the Qatar Development Bank and setting up entrepreneurship programmes. One faculty member highlighted the entrepreneurship course, which integrates practical case studies from Qatar, such as those related to the FIFA World Cup 2022,

providing students with a real-world learning experience. One student mentioned the significant value of work and networking opportunities at the Qatar Financial Centre, stating, 'It has opened up the experience of meeting people from different industries and sectors.' Another student emphasised, 'Having a diversified workplace with colleagues from Europe and the Arab world helps you grow and learn from different perspectives.' The locally relevant curriculum along with internship opportunities prepare students for the job market in Qatar and the region.

Offering international study and work opportunities

QFBA-Northumbria further fosters a global orientation among its students by offering opportunities to study and work abroad. Students completing the foundation programme at QFBA can have the option to transfer to any university in the UK. Additionally, one student commented that 'Northumbria does an excellent job with its multiple international campuses worldwide, giving students the opportunity to do a semester abroad in places like the UK, Beijing, Hong Kong, Singapore, and Amsterdam.'

2. Mutual benefits

The partnership between QFBA and Northumbria University brings mutual benefits to both institutions and the broader community in Qatar.

For Northumbria University, the partnership aligns with several strategic objectives, which includes enhancing student mobility, accessibility, and widening participation by promoting upward social movement. Establishing a presence in Qatar also helps Northumbria achieve its goal of being an internationally recognised institution with a significant global influence. Financial sustainability is another significant benefit, as the partnership attracts international students who pay international student fees. This diversification of income is crucial given the financial challenges faced by many UK universities, providing a commercial imperative for the partnership.

For QFBA and their faculty, the partnership provides access to high-quality education, materials, assessments, and teaching staff from Northumbria. The partnership enhances staff development and capacity building. A senior administrator from Northumbria mentioned that Qatari staff are sensitive to the qualification requirements in the British system, promoting many to pursue PhDs. The collaboration also fosters close relationships between Qatari and UK module leaders, providing substantial support and opportunities for professional development. Faculty has commented that the University supports research collaboration and skill development through training with UK counterparts, enhancing professional expertise.

For the Qatari society, the partnership between QFBA-Northumbria and Qatar also contributes to gender equality and economic sustainability. A faculty member from the UK noted that while finance degrees in the UK typically attract more male students, a higher percentage of women are enrolled in the programme in Qatar. One female student highlighted that the Qatar Foundation and the government actively promote gender equality, and she believes QFBA-Northumbria exemplifies this success.

In terms of economic sustainability, the partnership between QFBA-Northumbria and Qatar strengthens the banking and finance sector by building local expertise. It equips students with relevant skills that

contribute to the country's long-term economic stability. As one UK university pointed out, this approach helps retain talented individuals within Qatar, reducing brain drain and fostering local economic growth. Additionally, by developing local expertise, the partnership attracts skilled professionals from outside the country, further enhancing Qatar's economic viability in the future.

3. Effective leadership and open communication

One of the challenges was meeting regulatory requirements from both Qatar's Ministry of Education and Northumbria University. Senior members at UK universities emphasised that close collaboration with the Qatari Ministry has been crucial for tailoring programmes to market needs. The Qatari Ministry focuses strongly on ensuring university offerings are not duplicated. Therefore, effectively managing their expectations and clearly demonstrating how new programmes address market needs and align with Qatar's national strategy is essential for programme expansion.

Another initial challenge was the logistics of fly-in faculty and maintaining consistency in teaching with multiple instructors for the same module and delivering courses in different countries. To address this, induction programmes on local culture and teaching expectations were offered. Recently, Northumbria hosted events for faculty members in several partnering institutes to discuss challenges and cultural considerations, demonstrating a proactive approach to improving collaboration.

Despite initial challenges, the partnership between QFBA and Northumbria University has evolved into a long-term strategic relationship committed to mutual growth. Extended until 2028, the partnership has strengthened through expanded educational offerings, enhanced research collaboration, and improved operational efficiency, aligning closely with Qatar's national development goals.

When asked how the partnership may develop as the in-country capacity develops, a faculty member suggested that the University may further transition to a different type of TNE arrangement, reducing teaching requirements for UK institutions in Qatar and allowing a greater focus on strategic and collaborative initiatives.

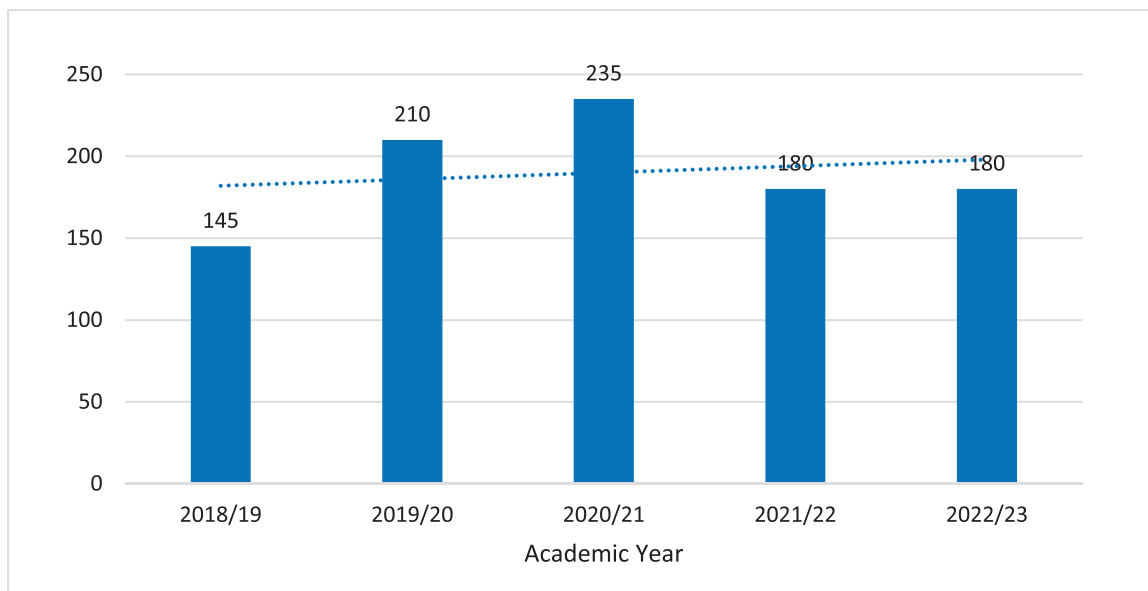
7.2.6 Case study 4. University of Central Lancashire (UCLan) and Qatar Police Academy

The University of Central Lancashire (UCLan) began its partnership with Qatar following a significant fire at the Villaggio Mall in 2012. An external review by UK Fire and Rescue services highlighted a lack of training for the Qatari civil defence. The Qatari Ministry of Interior issued a tender for fire safety educational programmes, which was awarded to UCLan for its expertise in fire safety management and engineering. The collaboration started in January 2016 with UCLan delivering fire safety management programmes at the Ras Laffan Emergency and Safety College. Initially focused on fire safety management, the partnership expanded to include fire safety engineering and emergency and crisis management.

Post-COVID, the Qatari Ministry of Interior took over the college, integrating it into the broader educational framework of the Ministry, which includes the police college and other military training institutions. This integration led to the creation of an educational arm under the Ministry of Interior, with UCLan's programmes becoming part of the Police Academy's offerings. Currently, the Police Academy offers a bachelor's degree in four majors: law and policing, international engineering for fire safety, international fire safety management, emergency and disaster management. The programmes are delivered by UCLan's faculty members based in Qatar.

The success of UCLan's partnership with the Qatar Police Academy is evident in its financial viability, as it effectively meets the needs of the Qatari society and provides essential services to the government in strengthening the police force. The partnership's alignment with UCLan's international development goals and strong leadership have both contributed to its sustainability.

Figure 16. University Central Lancashire UK TNE undergraduate enrolments in Qatar 2020-2023.



Source: HESA Aggregate Offshore Records.

1. Financial viability

In terms of the funding structure, UCLan's programmes are funded by a flat fee paid by the Qatari government. A significant portion of the students are Ministry of Interior staff or recruits destined for roles within Qatar's emergency services. The University works closely with the Qatari government to ensure a steady flow of students through sponsorship and recruitment programmes. On the other hand, there are also private students, many of whom are not Qatari nationals. As UCLan's degrees in Qatar maintain the same academic standards as those in the UK, the appeal of a UK degree, combined with UCLan's strong reputation in the field and partnerships with international firms, validates the quality and employability of its graduates.

The agreement between UCLan and the Qatari ministry includes a maximum number of students per programme to ensure a balanced staff-student ratio. If enrolment increases significantly, the contract would be adjusted to hire additional staff. Overall, this arrangement ensures financial stability and allows UCLan to maintain quality without worrying about fluctuating enrolments.

2. Mutual benefits

For UCLan, the partnership aligns with its goals to enhance reputation and reach, address capacity development needs, and generate income. The University has set up branch campuses and is partnering with institutions in various countries to offer joint programmes and degrees including Cyprus, Qatar, Oman, Greece, Sri Lanka, Mauritius, Hong Kong, Egypt, and Bangladesh. Before expanding into Qatar, UCLan had established a successful collaboration with Oman through a franchise arrangement with the International College of Engineering and Management (ICEM). This collaboration involves UCLan delivering engineering and fire safety programmes in Oman, ensuring that the degrees meet the same high academic standards as those offered in the UK. This experience and the successful management of international projects in Oman contributed to UCLan being selected for similar initiatives in Qatar, allowing UCLan to leverage its expertise in fire safety and police programmes.

For Qatar, the partnership provides capacity building for both the police force and the fire emergency services, areas that require international expertise. UCLan's presence in Qatar involves hiring not only UK faculty but also international experts as well as Qatari nationals with the necessary qualifications. It is projected that Qatar will develop greater capacity in delivering education locally in the future.

When asked how the partnership might evolve if the Qatari Academy develops the capacity to deliver education locally, a senior faculty member suggested that Qatar might transition to a franchise arrangement. The Qataris, particularly the Police Academy, are keen on learning and integrating UK academic and administrative standards and best practices into their own system. The faculty member also noted that while this shift could entail different quality assurance measures, it is transition that could result in a stronger partnership.

More broadly speaking, UCLan's senior management recognises that institutions in Qatar and the MENA region aim to become award-granting institutes and deliver their own programmes. They view this as an opportunity for continued collaboration, such as linking institutions globally and developing tripartite or multi-partite qualifications. UCLan's senior management believe that UK universities can adapt to these changes by enhancing student experiences, improving employability skills, and expanding offerings into new areas.

3. The role of leadership

When asked about the role of leadership, senior management at UCLan emphasised the importance of having senior staff based in the partner country. The presence facilitates effective communication and enhances relationship management. For example, in Qatar, having a Dean of International based locally helps avoid misunderstandings and demonstrates commitment to the partnership. However, it was also noted that the autonomy of in-country leaders can sometimes hinder detailed communication with the home campus. To manage this, selecting the right person for these roles and establishing a robust governance structure to maintain clear communication and effective relationship management are key.

7.3 United Arab Emirates (UAE)

Country Profile
Population: 10 million Median age: 33
Number of foreign nationals (expats) : (85%) 8,500,000
Number of university students : 159,000 in 2022
Inbound university students: 60,713 non-nationals (including expatriates) in 2022 Inbound tertiary students: 237,034 in 2023 (UNESCO estimate)
Outbound students : 18,600 in 2022 (UNESCO estimate)
Income per capita : \$53,708
28 HEIs in Abu Dhabi 48 HEIs in Dubai
10 HEIs In Sharjah, 3 HEIs In Ras al-Khaimah, 4 HEIs In Ajman, 8 HEIs In Fujairah 2 main in Umm Al Quwain HEIs along with smaller institutions
-32 (IBCs) – 17 Single Discipline IBCs, 15 Comprehensive IBCs -16 Local Private or Public HEIs
TNE tuition fees for undergraduate degrees offered by UK institutes: £4,890 – £42,250 (Mostly in IBCs or franchise arrangements)

7.3.1 Macro environment

The United Arab Emirates (UAE) is a federation of seven states that has grown into one of the Middle East's most important economic centres. The UAE's economy, heavily reliant on oil and gas, ranks as the world's seventh-largest oil producer, with wealth concentrated in Abu Dhabi and Dubai serving as a major global trade hub. Meanwhile, successful economic diversification has reduced the oil sector's GDP share from 44% in 2000 to about 30% of its GDP in 2021. Recent efforts to diversify the economy include the Nafis programme, which aims to boost Emirati employment in the private sector, targeting a 10% Emirati workforce in private companies by 2025. The UAE Dirham's peg to the US dollar has helped maintain inflation stability and predictability in costs of living.⁴³

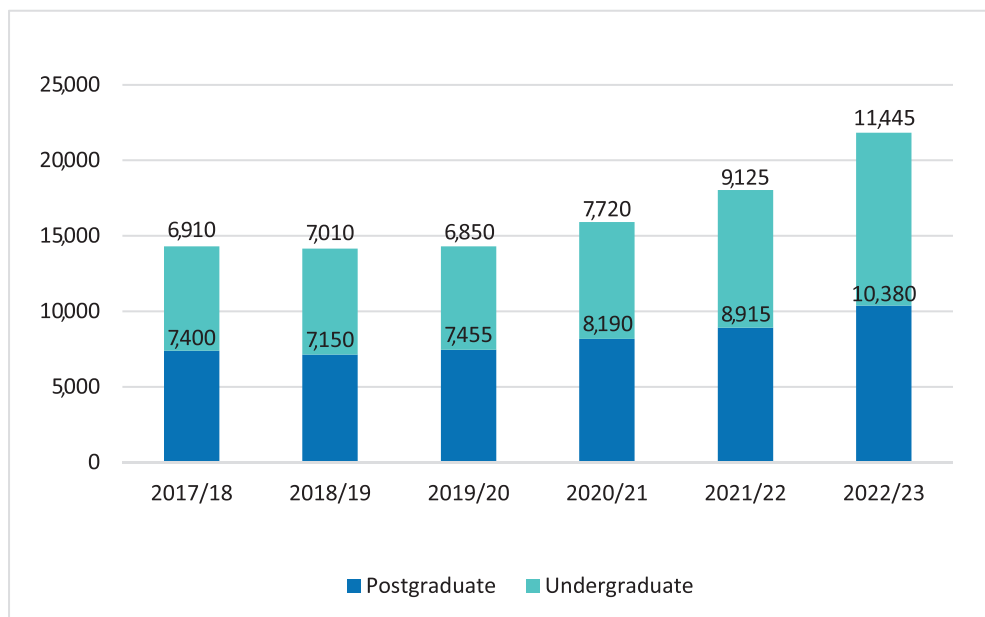
The UAE is a promising international recruitment hub, attracting students from MENA, South Asia, Central Asia, and increasingly from South East Asia and Africa. Over the past two decades, particularly in Dubai, the UAE has become a key regional and global hub for transnational education (TNE), hosting over 237,000 international students in 2023. Dubai alone hosts nine UK IBCs, spanning both comprehensive and single-discipline offerings.

7.3.2 TNE enrolments in UAE

The data in Figure 17 shows that UK TNE in UAE has shown a notable upward trend in the last five years, with only a slight dip (-1%) in 2018/19. In terms of the level of provision, similar to Qatar, UK TNE degrees in the UAE during 2022/23 are being offered relatively equally at both undergraduate and postgraduate levels (around 50% each). The growth trend in undergraduate enrolments show the growing financial strength in the sector, while good postgraduate enrolments demonstrate an increased demand for research and advanced education delivery.

⁴³ 'Market Intelligence Brief - United Arab Emirates.'

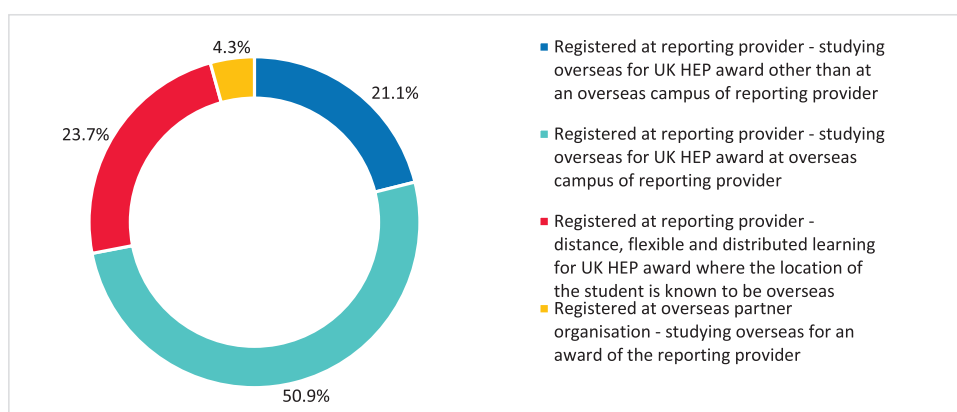
Figure 17. UK TNE postgraduate undergraduate enrolments in the UAE 2017-2023.



Source: HESA Aggregate Offshore Record. Data for 2018/19 and earlier excludes students registered with Oxford Brookes University.

Figure 18 shows most enrolments in UAE have been classified as ‘Registered at reporting provider - studying overseas for UK HEP award at overseas campus of reporting provider’ (50.9%). This suggests that IBCs are the most prominent TNE model in the UAE. It is followed by ‘Registered at reporting provider - distance, flexible and distributed learning for UK HEP award where the location of the student is known to be overseas’ (23.7%) and ‘Registered at reporting provider - studying overseas for UK HEP award other than at an overseas campus of reporting provider’ (21.1%). A smaller percentage of enrolments are from ‘Registered at overseas partner organisation - studying overseas for an award of the reporting provider’ (4.3%).

Figure 18. UK TNE in the UAE by type of provision 2022-23.



Source: HESA Aggregate Offshore Record.

7.3.3 Policy and regulatory environment

The policy environment is overall conducive for foreign universities. The Ministry of Education (MoE) launched the National Strategy for Higher Education 2030, aiming to enhance higher education by focusing on key areas: improving access to high-quality education, fostering scientific research, preparing graduates for the job market through partnerships with the private sector, and supporting global competitiveness through accreditation standards and teacher qualification.⁴⁴

The Memorandum of Cooperation (MoC) signed in 2021 between the UK and UAE further highlights nine priority areas for collaboration. These include Life Sciences, Hydrogen, Space, Emerging Renewable Energy Technologies, Smart and Green Sustainable Manufacturing. These areas will be implemented through joint engagements between government, businesses, and academic entities.⁴⁵

Strong historical economic ties with the UK further enhance its appeal for UK universities. The UK has the largest market share of TNE operations in the country. There are 61 UK universities operating in the UAE, the majority of them operating IBC, franchise, validation, or articulation models, with only three UK universities delivering dual/joint degrees. In the 2020/21 academic year, UK institutions recorded 16,350 TNE and distance learning enrolments in the UAE, making it the UK's largest TNE market in the Middle East and one of the top ten globally.⁴⁶

Accreditation bodies

The Ministry of Education (MoE) in the UAE oversees higher education and scientific research, drafts laws for public institutes, and licenses and accredits private institutions. The Commission for Academic Accreditation (CAA) licenses higher education institutions and accredits their programmes to ensure high-quality education aligned with international standards.⁴⁷ There are also accreditation bodies for private education in

the emirates, such as the Knowledge and Human Development Authority (KHDA) in Dubai, the Department of Education Knowledge (ADEK) in Abu Dhabi, and the Sharjah Private Education Authority in Sharjah.

UK universities typically seek accreditation through accreditation bodies in the free zones (i.e., KHDA and ADEK) first. Some universities, subsequently, opt for CAA accreditation, as it is often perceived as more complex and lengthy. However, CAA accreditation is crucial for qualification recognition in the UAE, as graduates from non-CAA accredited universities cannot work in the UAE public sector, potentially discouraging students from applying to such institutions. In addition, having CAA accreditation also means having access to government funding.

Our research indicates that the CAA strongly encourages universities to pursue their accreditation, noting that many foreign universities are unfamiliar with the UAE's regulatory environment. Universities are recommended to consider a dual-track approach, combining KHDA and CAA accreditation, as practiced by institutions like the University of Birmingham and London Business School. The CAA also welcomes other TNE models beyond the IBC model. Their accreditation criteria focus on equivalence with the main campus, including having robust admissions, faculty qualifications, and exam standards. This translates to a focus on financial viability as well as education quality. Accreditation can be obtained within six to nine months, at low cost and risk, with the CAA encouraging immediate application to save time and money.

The focus on quality and financial viability at CAA is also mirrored in the accreditation bodies in the free zones. When considering TNE operations in Abu Dhabi, ADEK evaluates how these investments align with the emirate's strategic priorities, particularly those linked to the job market and economic growth. ADEK focuses on three key pillars for TNE

⁴⁴ 'UAE Market Intelligence Report May 2022.'

⁴⁵ United Arab Emirates Ministry of Foreign Affairs. "UAE, UK Agree to Establish New, Ambitious 'Partnership for the Future!'" Embassy News, Embassy of the United Arab Emirates, London, September 18, 2021. Accessed November 3, 2024. <https://www.mofa.gov.ae/en/missions/london/media-hub/embassy-news/partnership>.

⁴⁶ 'UAE Market Intelligence Report May 2022.'

⁴⁷ 'Regulatory Authorities of Higher Education.' The United Arab Emirates' Government Portal. <https://u.ae/en/information-and-services/education/higher-education/regulatory-authorities-of-higher-education>

sustainability: financial viability, student-focused initiatives, and alignment with Abu Dhabi's strategic objectives.

First, institutions need to demonstrate they have long-term financial commitment. These include being able to recruit students based on the needs of the local population, including both Emiratis and expatriates, having investment in their academic faculty, and having suitable digital and physical campuses. Secondly, given Abu Dhabi is a competitive market, a commitment to quality and adherence to rigorous academic standards is crucial. As such institutions must avoid the perception of their IBCs as inferior campuses. Finally, ensuring their programmes align with ADEK's agenda is essential.

7.3.4 Challenges and opportunities for UK universities

With the IBC model being the most popular TNE option in the UAE, UK HEIs are exposed to high levels of competition from other institutions that host branch campuses in the emirates. Despite having the largest proportion of IBCs in the country, UK TNE provision is just one of multiple options for domestic students (both Emiratis and expats) and international students keen to benefit from a burgeoning higher education environment. At present, prospective students can choose to study at the UAE's rapidly developing domestic universities – the UAE currently has four universities in the Times Higher Education World University Rankings top-400 - University of Sharjah, United Arab Emirates University, Khalifa University, and Abu Dhabi University. Alternatively, students can choose from a growing number of providers following the international branch campus model.

Dubai alone is host to over 30 IBCs, along with a smaller amount in Abu Dhabi and Ras Al Khaimah via the RAKEZ Academic Zone. These IBCs are linked to home institutions from countries such as France, Australia, Germany, the USA, and India. They range from single discipline IBCs focusing on MBA programmes or other specialist subjects, to much larger comprehensive universities. In the Emirate of Dubai, 38% of TNE enrolments are via UK HEIs, pointing to a high level of preference for UK degrees. However, strong competition is also present, particularly among Australian providers like the University of Wollongong which

was established in 1993 and enrolls roughly 3,000 students at its campus in Dubai's Knowledge Village free zone. New York University's Abu Dhabi campus is another large provider of TNE provision in the UAE via its campus in Abu Dhabi which opened in 2010.

While the market-driven approach to TNE in the UAE has created the conditions for the rapid expansion of IBCs, outside of the IBC model other sustainable forms of TNE can be pursued. New partnerships focused on teaching and research, aligned with the wider development goals of the UAE can provide opportunities for UK institutions specialising in certain fields. One such example is the partnership between the University of Bristol and the Royal Agricultural University and Sharjah's University of Al Dhabi - a non-profit scientific institution specialising in agriculture, environment, food, and livestock. By helping to address issues of food security, climate change and animal welfare, this partnership not only gives the UK partners a chance to showcase their world-leading teaching and research capabilities, but it also contributes significantly to important development goals in the UAE.

TNE opportunities outside of Abu Dhabi and Dubai

Most TNE in the UAE is concentrated in Abu Dhabi and Dubai - the two most economically developed and populous emirates among the seven. However, UK institutions seeking to establish sustainable TNE ventures in the UAE can explore opportunities in other regions such as Sharjah and Ras Al Khaimah. These emirates have been actively developing their infrastructure to support TNE initiatives within their respective borders and present a viable alternative.

Sharjah

The third largest of the seven emirates, Sharjah has a population of 1.8 million. Higher education provision in Sharjah is delivered by its twelve universities which fall under the regulation of the federal level Ministry of Education. With its diverse economic base and growing population, Sharjah presents an alternative for UK institutions looking to engage in TNE in the region outside of the IBC model. There are currently no overseas universities operating the IBC model in Sharjah. Alongside developing TNE provision in Sharjah, the emirate has potential for increased research collaboration between its universities and UK universities. UK

universities can align their expertise with the evolving needs of key sectors in the Emirate. The University of Bristol and the Royal Agricultural University's partnership with the University of Al Dhaid is one such example. The University of Exeter's recent collaboration with the Emirate of Sharjah in the maritime field is another.

Ras Al Khaimah

In terms of overall size, Ras Al Khaimah is the fourth largest Emirate after Abu Dhabi, Dubai, and Sharjah. It has a population of just over 400,000 – approximately 4% of the overall population of the UAE. Ras Al Khaimah has three universities accredited by the Ministry of Education's Commission for Academic Accreditation (CAA). These include the American University of Ras Al Khaimah, Higher Colleges of Technology, and Ras Al Khaimah Medical and Health Sciences University.

Similar to Dubai, Ras Al Khaimah has taken a market driven approach to TNE, setting up a free zone to accommodate university IBC's. At present the RAKEZ Academic Zone is home to nine IBCs, five of which are UK based providers – University of Bolton, University of Stirling, University of West London, Bath Spa University, and Birmingham City University. The four other IBCs are from Switzerland, USA, Pakistan, and India. RAKEZ uses its own regulatory framework and issues its own educational licenses.

In Ras Al Khaimah, where government requirements for university rankings are less stringent compared to Dubai and Abu Dhabi, the environment can be more conducive for universities outside the top tier to set up IBCs. However, similarly to Dubai

and Abu Dhabi, UK universities establishing IBCs in Ras Al Khaimah still need to focus on adhering to rigorous quality assurance processes, ensuring that academic standards remain consistent with their home institutions, and prioritising graduate employability.

One university leader at the University of Bolton reported that its university implemented several strategies for quality enhancement at the IBC. These include appointing external examiners from the UK campus to oversee the quality of student work and maintain alignment with academic practices at home. Additionally, the institution places a strong emphasis on academic and staff development, supporting staff members in pursuing higher qualifications. Furthermore, the IBC maintains a personal tutoring system and regularly updates its curriculum and quality frameworks to align with UK standards. Over time, this collaborative approach has strengthened the institution's involvement in curriculum development, quality assurance, and other academic processes.

Student success and employability are central focuses of the institution's strategy. The University actively engages with corporate organisations in Ras Al Khaimah, ensuring that the academic disciplines offered align closely with the emirate's economic priorities. Internal initiatives facilitate student internships and placements, while career fairs attract a diverse array of companies offering job opportunities. This dedicated emphasis on employability prepares students effectively for the competitive job market upon graduation.

7.3.5 Case study 5. University of Birmingham Dubai

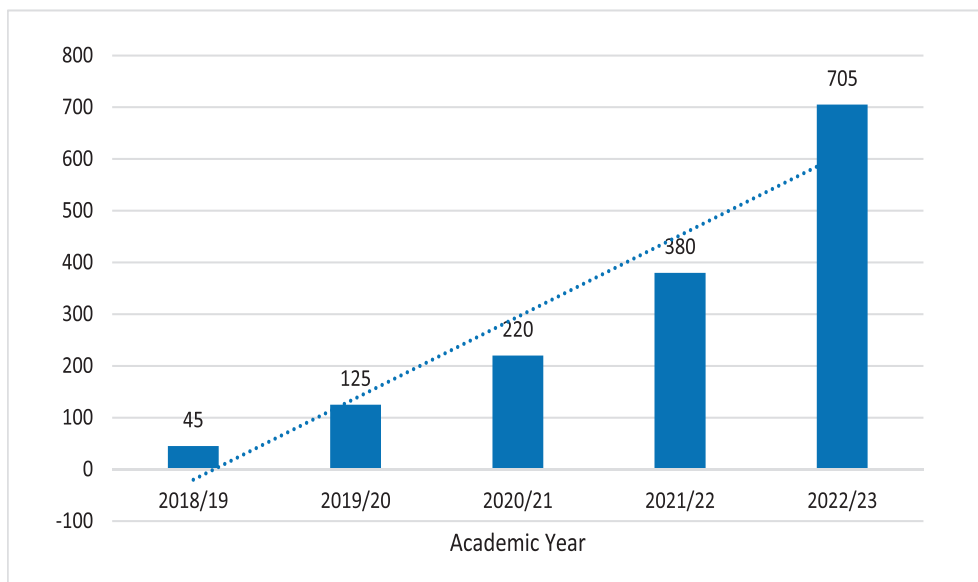
5

Case Study

The University of Birmingham, one of the world's top 100 universities, established its Dubai campus in 2018. The University of Birmingham Dubai strategically positions itself to contribute to Dubai's emergence as a regional centre for top-tier higher education and talent cultivation, aligning with the UAE's vision of a knowledge-driven economy. The IBC was licensed by the CAA. While not directly under KHDA, the University operates with their support, adhering to their standards for excellence.

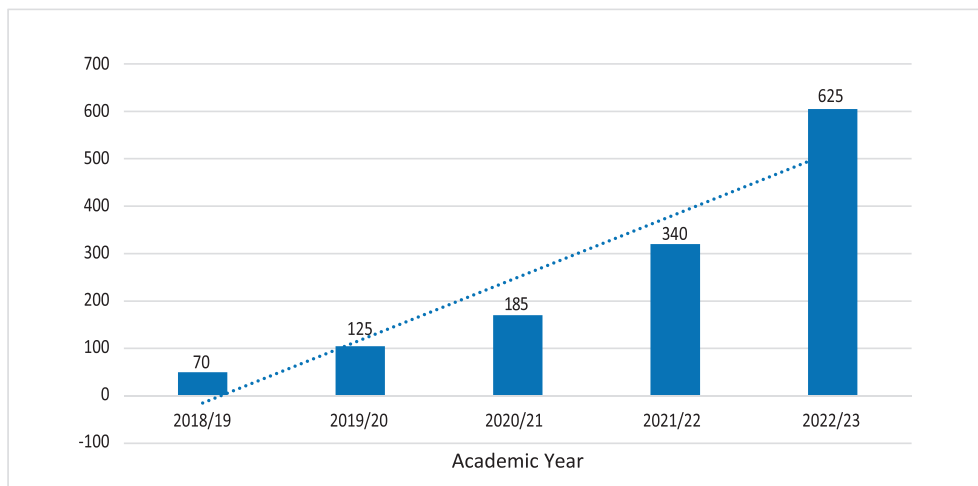
The University features a state-of-the-art branch campus, offering various programmes including MSc Accounting and Finance, Advanced Engineering Management MSc, MSc Advanced Practice in Healthcare, BSc in Artificial Intelligence and Computer Science, BSc in Artificial Intelligence and Computer Science with Integrated Foundation Year, MSc/PGDip in Artificial Intelligence and Computer Science, MSc in Artificial Intelligence and Machine Learning, and MSc in Bioinformatics. The sustainability of the University of Birmingham in Dubai can be characterised by its financial viability and mutual benefits.

Figure 19. University of Birmingham UK TNE undergraduate enrolments in the UAE 2018-2022.



Source: HESA Aggregate Offshore Records.

Figure 20. University of Birmingham UK TNE postgraduate enrolments in the UAE 2018-2022.



Source: HESA Aggregate Offshore Record.

1. Financial viability

The campus is fully funded by the University from its own operations and is expected to become financially sustainable without further investment from the Edgbaston campus in the UK. It also operates independently and receives no subsidies from the Dubai or Emirati governments. The University of Birmingham maintains financial sustainability for its Dubai campus through a strategic focus on reputation building, efficient operational management, and robust growth strategies.

Reputationally, the University ensures that the Dubai campus upholds the same high standards as the Edgbaston campus in the UK. This commitment to quality means that students receive an education of equivalent calibre, and graduates are awarded the same degree certificates. Senior management emphasises the importance of integrating the Dubai campus fully into the broader University structure, fostering a unified identity. From the student viewpoint, Birmingham's ranking was one of the key reasons they chose the University. One student said, 'The University's ranking made it easier for me to choose.' 'It has a huge impact on my CV as well', added another student. Another student mentioned that studying

at a high-ranked university has the added benefit of qualifying for the 'golden visa' offered by the government to retain foreign talent in the country. Operationally, the University applies its operational practices from the Edgbaston campus to the Dubai campus to reduce technology transfer costs. For instance, the Dubai campus applied a similar smart campus model to that developed in the Edgbaston campus, to optimise campus management through advanced technologies, contributing to a low-carbon, sustainable campus environment.

The University takes pride in its campus development and leverages it to enhance recruitment efforts. The students interviewed in this study were highly satisfied with the campus development, as one student said, 'I really enjoy the design, the big space, and the tall roof. I feel liberated in this area.' On the classroom facilities, another student noted, 'The lecture room is very nice. The seating, the screen, and the sound effects are pretty nice. I would say it's a world-class level.' Commenting on the study space, one student said, 'I come to the uni from 10:00 AM and stay until 10:00 or 11:00 PM most days. I really enjoy studying here and people like to stay here, chill out, and enjoy time with friends.'

For growth, the University maintains equivalent entry standards and pricing as the UK campus, avoiding the dilution of quality. With 38 undergraduate degree programmes and 35 graduate programmes, the IBC has one of the largest degree offerings among UK universities. The programme portfolio is carefully balanced to include both popular programmes and a broad range of academic areas, ensuring relevance to student needs. Initially, programmes at the Dubai campus adhere to those at the UK campus for accreditation purposes, but there are plans to develop locally relevant content and unique programmes specific to Dubai, i.e., developing courses in supply chain given Dubai's position as a commercial and transportation hub.

2. Mutual benefits

To maintain sustainability in UAE, one of the key focuses is on alignment to the local development goals. Aligned with the CAA's and KHDA's objectives, the University is committed to long-term development goals, emphasising quality and equivalency. Significant investments are made in academic and student experiences, including creating a state-of-the-art campus.

For the University of Birmingham, the main reasons for entering into the partnership include growing international reach and reputation, changing university identity, and mitigating volatility in the UK's international student recruitment. Firstly, the university's goal of expanding its international reach and reputation. Dubai was chosen for its perceived opportunities and dynamism, which would enhance the University's global standing. Secondly, the establishment of the branch campus allows the University to transition from being primarily a national university with international aspirations to becoming a truly international institution with global impact. Finally, the branch campus serves as a mitigation strategy against the volatility in the UK government's approach to international student recruitment and immigration, providing an alternative destination

for international students amidst regulatory uncertainties in the UK.

For students in Dubai, the University has brought various benefits. Similar to Qatar, the student body in Dubai is diverse, comprising students with different aspirations and future trajectories. A graduate student in computer science commented that Dubai offers many opportunities. The student emphasised Dubai's strategic location for business, citing career fairs and opportunities with tech giants like Microsoft, Google, and Amazon. He found the university's resources valuable, including partnerships with companies like NVIDIA, which provided practical experience and networking opportunities. He added that the ease of obtaining work visas in Dubai compared to other countries like the US makes it an attractive option post-graduation.

Another student shared his positive outlook on the employability aspects of his biomedical science degree, emphasising the skills acquired through lab work and scientific writing. He expressed interest in international opportunities, particularly internships and training programmes in the UK, which he perceived as more abundant compared to Dubai. The student believed that the study experience allows him to 'become a team player, to work with people, [to learn] how to write scientific articles.' This, he felt, would enhance his employability both locally and internationally.

In conclusion, the University of Birmingham Dubai has established itself as a key player in the region's higher education landscape, maintaining the high standards of its UK counterpart. Strategically positioned in Dubai, the campus leverages its location and industry partnerships to offer diverse opportunities and state-of-the-art facilities, benefiting students' academic and professional growth. Positive student feedback highlights the enriching and supportive environment, making the University an attractive option for enhancing employability and achieving career goals.

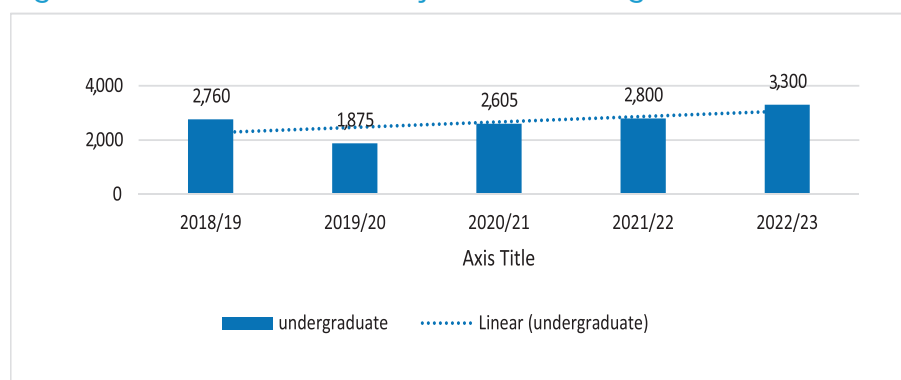
7.3.6 Case study 6. Middlesex University Dubai

Established in 2005, Middlesex University Dubai was one of the first international branch campus to open in the United Arab Emirates, and the first Middlesex University campus established overseas. The campus was first located in Dubai's Knowledge Village freezone and has since expanded further into the Dubai International Academic City (DIAC) campus as of 2021. Middlesex University Dubai is one of the largest UK IBC operations globally, with current enrolment levels at around 5,600 students. The University aims to grow these figures to 8,000 students in the next three-four years.

Middlesex University Dubai is the largest British higher education institution for total student enrolment licensed by Dubai's Knowledge and Human Development Authority (KHDA). The University offers undergraduate and postgraduate programmes in a wide variety of subject areas. This includes Business, Computer Engineering, Sport Science, Psychology, Art and Design, Media, and two MBA Programmes. The LLB Programme offered in Middlesex University Dubai is the only face-to-face British Qualifying Law Degree currently offered in the UAE.

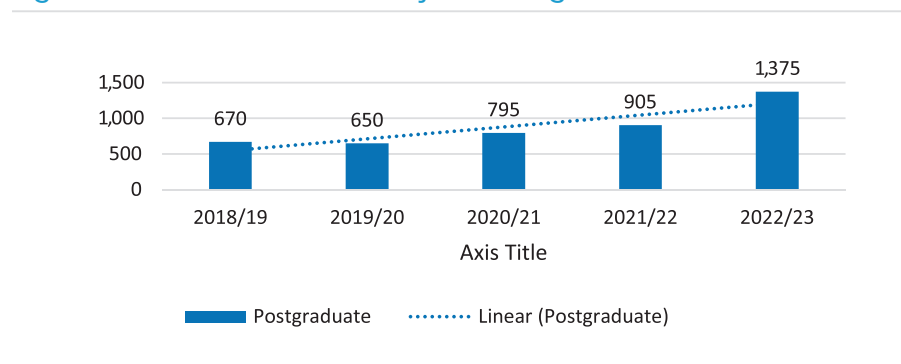
The example of Middlesex University Dubai shows signs of sustainability in a number of areas aligned with this report's sustainability framework. These were identified after conducting desk research and interviews with the University management and students via a discussion group.

Figure 21. Middlesex University UK TNE undergraduate enrolments in the UAE 2018-2023.



Source: HESA Aggregate Offshore Record.

Figure 22. Middlesex University UK TNE graduate enrolments in the UAE 2018-2023.



Source: HESA Aggregate Offshore Record.

1. Financial viability

As noted by Middlesex University Dubai's senior management, financial sustainability is not just about maintaining overall good financial health, but ensuring the campus can thrive independently. The Dubai-based campus is fully funded by its own operations, not relying on external sources of funding from the UK campus, or from other stakeholders within the UAE. This is largely driven by student tuition fee revenues paid by students recruited into Middlesex University Dubai's courses each year. Using data provided by the KHDA we can see that enrolments jumped to 5,600 in the academic year 2023-2024 from 3,705 in 2021-2022, helping the institution maintain a financially robust model of TNE.

Middlesex University Dubai has established itself as an integral part of the UAE's educational landscape, but looking ahead, the University is also optimistic about its growth potential, further strengthening its financial viability as a TNE operation. The University is aiming to reach 8,000 student enrolments in the next three to four years. This optimism is fuelled, according to the Middlesex University stakeholder interviewed, by economic growth in the Middle East, South Asia, and China, coupled with the high regard for the UK education system in overseas source markets. The University employs international student recruitment staff locally in the UAE to recruit students directly from source markets into the branch campus. Roughly 60% of students come to study at the University directly from overseas, whereas the remainder are from families already based in the UAE. According to KHDA data, 1% of the Middlesex University Dubai study body is local Emirati.

Running a financially self-sustaining campus has allowed Middlesex University Dubai to invest significantly in student services and support. This was noted in the group discussions with current students who highlighted the accessibility of sports teams and student societies on campus and spoke about the positive impact they had on the overall experience student experience:

'one thing that I really appreciate Middlesex doing, is putting a lot of emphasis on both academics and sports.' Also noted during the student discussion groups was the emphasis the University places on its careers and employability service with students speaking highly of its impact in preparing them for the workplace and finding future employment opportunities and internships: 'I think they [in the careers service] are very helpful, because it's not just catered to one specific field, but several different fields. And over the years I personally have seen how the Careers Department has improved'.

The campus's ability to deliver high-quality education alongside a comprehensive student experience directly influences its success, and in turn its financial viability. As noted by the University senior management: 'A quality student experience is the most important aspect of financial viability'. By investing in these areas, Middlesex University Dubai has developed a reputation for offering a well-rounded student experience covering academics, extra-curricular activities, and student support. This in turn leads to better recruitment results as prospective students hear positive word-of-mouth reviews from their peers, or even family members, as was noted in the student discussions: 'I knew a lot of people from high school that went on to Middlesex, and they all went on to have good careers, so that's why I chose Middlesex University'.

2. Partnership breadth and depth

Middlesex University Dubai offers a wide range of degree programmes in multiple academic disciplines. The course offerings available to students were decided upon as part of a conscious effort to strategically align its programmes with the economic development needs of Dubai and the UAE, contributing significantly to the local job market. As noted by the senior University stakeholder, 'your branch campus has to be enmeshed with the goals of

the country, the goals of the city.' Furthermore, a number of these academic disciplines have developed a strong academic reputation within the local education sector, including the Psychology department which has contributed significantly to the training of mental health professionals in the UAE.

Alongside its foundation programme and undergraduate degrees across six different departments, the University also offers students education opportunities at the postgraduate level. This includes two MBA programmes and master's degrees in its departments of Computer Engineering and Informatics, Accounting and Finance, Business, Psychology, Law, and Health and Education. The University also offers an array of short courses for professional learning aimed at working professionals in Dubai's private sector. This includes programmes in leadership, taxation, HR, and the first executive programme on taxation in the Gulf region. Short-term English language courses up to 24 weeks are also offered.

The University has introduced a range of innovative degrees in subjects such as Data Science, Robotics, Cybersecurity and Digital

Media and Communications in recent years to reflect industry growth and the increasing interest in both creative and technology-driven careers across the UAE and wider Middle East. One MSc Robotics student interviewed specifically noted that Dubai's growth in the field of robotics was a major attraction to him when choosing a study destination, eventually choosing the Dubai campus over the UK. In the research field, the University hosts two research centres on campus - the Social Psychology Research Lab and Souq Economics Centre for Economic Research, further strengthening the breadth and depth of its TNE operations.

To conclude, Middlesex University Dubai's strategy revolves around ensuring financial viability by maintaining high educational standards, providing excellent student services, and aligning its course offerings with local market needs. Its sustainable practises serve as a positive example for other international branch campuses.

8. Conclusion

This research presents a Sustainable TNE framework derived from comprehensive studies and case analyses in Egypt, Qatar, and the UAE. It identifies five key indicators essential for TNE success: Mutual benefits, financial viability, breadth and depth, leadership and people development, and trust and communication.

Mutual benefits focus on aligning the goals of all stakeholders—students, faculty, staff, partner institutions, IBCs, local communities, and countries—ensuring equity and fairness. For example, the UEL-Ain Shams collaboration provides students with an affordable, globally recognised dual degree, enhancing employability through international studies and internships while ensuring educational quality meets UK standards. The QFBA-Northumbria partnership offers UK-accredited education in Qatar, fostering gender equality and local talent retention while supporting Northumbria’s global outreach. The University of Birmingham Dubai enhances its reputation and aligns with UAE development goals by offering high-quality, industry-connected education, making it appealing to international students amidst UK regulatory uncertainties.

Financial viability reflects an institution's ability to sustain and grow through stable funding sources. Unique programme offerings, brand enhancement, and reputation building are critical for resilience. For instance, UEL expands enrolment through partnerships with top Egyptian universities, diversifying its programmes through collaborations with Alexandria University and the West Ham United Foundation. QFBA-Northumbria attracts diverse students by combining practical learning with international study options, while the University of Birmingham Dubai achieves financial self-sufficiency through rigorous standards and strong brand reputation. Middlesex University Dubai focuses on tuition revenue and student

experience to drive enrolment growth, whereas UCLan Qatar benefits from a government-supported flat-fee model that ensures consistent revenue.

Breadth and depth refer to the quantity and quality of TNE activities in education, research, and operational integration. UH-GAF exemplifies this with diverse academic offerings across six schools, expanding its degree programmes from 13 to 18, and enhancing student skills through international learning and robust research capacity. Similarly, Middlesex University Dubai aligns its diverse programmes with the UAE’s economic needs while introducing innovative degrees in high-demand fields like Data Science and Robotics.

The final indicators, leadership and people development and mutual trust and communication, are illustrated by the cases of UH-GAF and QFBA-Northumbria. At UH-GAF, leaders from the UK and Egypt work together to navigate the complexities of establishing the institution, managing stakeholder expectations, and negotiating with regulatory bodies. Meanwhile, QFBA collaborates closely with the Qatari Ministry of Education to align programmes with market needs. Northumbria fosters communication among faculty from various institutions through events addressing logistical and cultural challenges.

Following this report, detailed TNE sustainability indicators were developed. As TNE activities mature in these countries, the proposed indicators will assist UK universities and their international partners in creating adaptable and impactful collaborations that meet institutional and regional objectives, guiding the establishment of sustainable partnerships in dynamic educational and economic environments.

Annex A.

UK TNE in Egypt

Institution	Partner Institute	Partnership Type	UG/PG	Tuition Costs (Per Year Equivalent in GBP) ⁴⁸
The University of Greenwich	October University for Modern Sciences and Arts (MSA)	Validation	UG	Egyptian student fees range from 844 - 4,830 International student fees are listed in USD but are the equivalent to 5,200 - 15,860 (GBP)
London South Bank University	British University in Egypt	Validation / Dual Degree	UG, PG	Egyptian student fees range from 987 – 4,594 International student fees range from 2,540 – 10,545
The Open University	The Arab Open University	Validation	UG, PG	UG fees range from 1120-2430 - PG fees range from 500-1500
Coventry University	The Knowledge Hub	Branch / Hub Model	UG	Fees for Egyptian students are different to fees for non-Egyptian students. Non Egyptian student fees range between 12,500 - 14,100 Egyptian student fees range between 11,025 - 12,870

⁴⁸ Fees may vary based on currency exchange rate

Institution	Partner Institute	Partnership Type	UG/PG	Tuition Costs (Per Year Equivalent in GBP)
University of Hertfordshire	The Global Academic Foundation	IBC	UG, PG	Fees for Egyptian students are different to fees for non-Egyptian students. Non Egyptian student fees are 13,500 Egyptian student fees range between 4,225 - 4,815
The University of East London	Ain Shams University	Dual Degree	UG	Fees range from 1,100-1,200 for Engineering
The University of Northampton	Arab Academy for Science, Technology and Maritime Transport	Dual Degree	UG	Term fees range from 3,181 – 5,053
University of Bedfordshire	October University for Modern Sciences and Arts (MSA)	Validation	UG, PG	Egyptian student fees range from 844 - 4,830 International student fees are listed in USD but are the equivalent to 5,200 - 15,860 (GBP)
Cardiff Metropolitan University	Arab Academy for Science and Technology	Franchise / Validation	UG, PG	Term fees range from 3,356 – 5,051 for Architectural Engineering and Environmental Design
Heriot-Watt University	American University in Cairo	Franchise	PG	Egyptian student term fee for MBA is 2,764 International students term fee for MBA is 3,404
The University of Wales	Modern University for Technology and Information	Franchise	UG	Egyptian student fees range from 300-1020 per semester. Foreign students pay additional 1000 at registration

Institution	Partner Institute	Partnership Type	UG/PG	Tuition Costs (Per Year Equivalent in GBP)
Queen Margaret University, Edinburgh	British University in Egypt	Joint Degree	UG	Egyptian student fees range from 1,214 – 1,345 for Nursing International student fees range from 2,488 – 3,100 for Nursing
Royal Veterinary College, University of London	Mansoura University	Partnership	UG	Egyptian student fee is 1,582 International student fee is 6,936
The University of Manchester	Mansoura University Alexandria University	Joint Degree	UG	Tuition fee is 9,633.64 for Mansoura University and The University of Manchester Egyptian student fee is 1,582 for Mansoura Manchester International student fee is 6,936 for Mansoura Manchester
The University of Central Lancashire	Arab Academy for Science, Technology and Maritime Transport	Articulation		Not stated
King's College London	New Giza University			This partnership is based on curriculum design, quality assurance, and capacity building. There is no teaching element.
The Manchester Metropolitan University	British University in Egypt	Dual Degree	UG	Egyptian student fees range from 3,796 – 3,146 International student fees range from 8,180 – 6,367
Queen Mary University of London	Ain Shams University	Postgraduate progression	PG	Not stated

Annex A.

UK TNE in UAE

Institution	Partner Institute	Emirate	Partnership Type	UG/PG	Tuition Costs (Per Year in GBP)
Heriot-Watt University	Heriot-Watt University Dubai Campus	Dubai	IBC	UG, PG	21,725 - 14,990
Middlesex University	Middlesex University Dubai	Dubai	IBC	UG, PG	IFP - 10,395 UG - 13,360 PG - 15,675 - 24,095
Coventry University	Emirates Aviation University	Dubai	Validation	UG, PG	28,750 - 16,825
Liverpool John Moores University	Dubai College of Tourism	Dubai	Franchise	UG, PG	Not stated
	Westford University College	Sharjah	Franchise	UG, PG	Not stated
The University of Birmingham	University of Birmingham Dubai	Dubai	IBC	UG, PG	33,780 - 24,875
The University of West London	The University of West London, RAK Branch Campus	Ras Al Khaimah	IBC	UG, PG	10,760 - 6,955
The University of Bolton	University of Bolton Academic Centre Ras Al Khaimah	Ras Al Khaimah	IBC	UG, PG, Other	10,755 - 5,975
The University of Manchester	The University of Manchester Middle East Centre	Dubai	IBC	PG	42,250 - 17,850
University of Nottingham	Ajman University	Ajman	Dual Award	PG	28,000 - 24,500
	Stafford Global	Ras Al Khaimah	Franchise	PG	13,440
Bath Spa University	Bath Spa University Academic Centre Ras Al Khaimah	Ras Al Khaimah	IBC	UG, PG	UG - 4,890 PG - 8,690
Buckinghamshire New University	IDM International University	Sharjah	Franchise		Not stated

Institution	Partner Institute	Emirate	Partnership Type	UG/PG	Tuition Costs (Per Year in GBP)
De Montfort University	De Montfort University Dubai	Dubai	IBC	UG, PG	21,570 - 13,170
London Business School	London Business School Dubai Centre	Dubai	IBC	PG	128,109
The University of Northampton	Stafford Global	Ras Al Khaimah	Online Delivery Franchise	PG	MBA - 10,910 MBA (top Up) - 3,840 DBA - 37,670
The University of Leicester	Stafford Global	Ras Al Khaimah	Online Delivery Franchise	UG, PG	Masters 10,000 -19,150 PhD 26,000
York St John University	Lincoln University of Business and Management, UAE	Sharjah	Franchise, Validation	UG, PG	Not stated
The University of the West of Scotland	Lincoln University of Business and Management, UAE	Sharjah	Franchise, Validation	PG	Not stated
Oxford Brookes University	Bradford Learning Global	Dubai	Validation	UG	1,020 plus examination fees
Arden University	Success Point College	Sharjah	Franchise	UG, PG	Not stated
Canterbury Christ Church University	Westford University College	Sharjah	Franchise	UG, PG	Not stated
The University of Dundee	Stafford Global	Stafford Global	Online Delivery Franchise	UG, PG	15,200
Edinburgh Napier University	Stafford Global	Ras Al Khaimah	Online Delivery Franchise	UG, PG	MBA - 11,295 UG - 5,250 - 7,965
City, University of London	City University Dubai Centre	Dubai	IBC	PG	10,250 - 6,900
Anglia Ruskin University	Aston International Education	Dubai	Franchise	PG	Not stated
Wrexham Glyndŵr University	Capital College	Sharjah	Validation	UG, PG	Not stated
The University of Bradford	The University of Bradford in Dubai	Dubai	IBC	PG	12,415
The University of Strathclyde	Strathclyde Business School UAE	Dubai	IBC	PG	14,810
University of Gloucestershire	DM Campus, UAE Westford University College	Ajman Sharjah	Franchise Franchise	UG, PG	Not stated

Institution	Partner Institute	Emirate	Partnership Type	UG/PG	Tuition Costs (Per Year in GBP)
The Manchester Metropolitan University	British University in Dubai American University in Dubai	Dubai	Joint Award	UG	Not stated
Teesside University	British Applied College	Umm Al Quwain	Franchise	UG	8,020 - 5,635
Queen Mary University of London	Ajman University	Ajman	Postgraduate progression		Not stated
The University of Glasgow	British University in Dubai	Dubai	Articulation	UG, PG	28,240
The University of Stirling	The University of Stirling Ras Al Khaimah Campus	Ras Al Khaimah	IBC	UG, PG	11,875 - 9,720
The University of Sussex	Ajman University	Ajman	Unclear	Unclear	Unclear
Leeds Beckett University	The Woolwich Institute, Dubai	Dubai	Articulation	UG	7,560
The University of Lancaster	Manipal University (dubal)	Dubai	Joint Award	UG	Not stated
The University of Exeter	University of Sharjah University of Khorfakkan	Sharjah	Articulation	UG	Not stated

Annex A.

UK TNE in Qatar

Institution	Partner Institute	Partnership Type	UG/PG	Tuition Costs (Per Year Equivalent in GBP)
The University of Aberdeen	Al Faleh Group for Educational and Academic Services - AFG College	Franchise	UG, PG	UG - 19,580 PG - 25,850 - 23,100 (MBA)
University of Northumbria at Newcastle	Qatar Finance and Business Academy (QFBA)	Franchise	UG, PG	UG - 15,480 PG - 18,140
Liverpool John Moores University	ORYX Universal College	Franchise	UG, PG	UG - 16,950 PG - 21,780 - 20,900
The University of Central Lancashire	Ras Laffan Emergency and Safety College (RLESC)	Franchise	UG	Not stated
University of Derby	Al Rayyan International University College	Franchise	UG, PG	UG - 17,600 PG - 20,900
The University of Bath	Education Development Institute-Qatar Foundation	Franchise	PG	PG - 2,080 - 5,920
Ulster University	City University College (CUC)	Franchise	Foundation, UG, PG	UG - 16,500 PG - 13,200
The University of Sussex	Rule of Law and Anti Corruption Centre Qatar	Franchise	PG	25,000

Annex B.

Transnational Education (TNE) Sustainability Pillars and Indicators

What it is

The TNE indicators are developed based on the TNE Sustainability Framework, designed to aid UK universities and their international counterparts in creating robust and long-lasting partnerships. The framework is structured around five key pillars:

- Mutual benefits
- Financial viability
- Partnership breadth and depth
- Effective leadership and people development
- Mutual trust and openness

How it was developed

The TNE Sustainable framework and its indicators were developed through a comprehensive study on TNE sustainability in the MENA region, involving extensive desk research, literature reviews, consultations with policymakers, university leaders, faculty and students in Egypt,

Qatar, and the United Arab Emirates. Four expert consultations with university leaders were conducted to validate their relevance and applicability.

Intended use and limitations

These indicators are designed for universities involved in TNE partnerships to assess and enhance their sustainability. The guide covers two stages of TNE development: the developing stage and the maturing stage, capturing TNE partnerships as they evolve, supporting growth and expansion both within the region and beyond. For universities with smaller TNE operations, these indicators can be adapted to fit their needs. While the indicators are designed based on the MENA context, they can be adapted for use in other contexts.

1. Mutual benefits

1.1. Developing stage (Year 0-3)

- Expand access to quality education; enable TNE for students, including women and disadvantaged groups, who choose to study in the host countries.
- Support employability through domestic and international internships, exchanges, and job placements.
- Enhance the student experience with international curricula and extracurriculars.

1.1.2. Faculty development and quality enhancement

- Enhance host institutions' capabilities and educational quality through training and alignment with UK quality assurance standards, emphasising improved pedagogy and assessment practices.

1.1.3. Reputation building

- Ensure consistent education quality across campuses to maintain equivalency in academic standards.
- Strengthen the reputation of both UK and host institutions, such as enhancing teaching and research quality and advancing internationalisation.

1.1.4. Alignment with local needs

- Ensure educational programmes align with the host country's development goals, measured by relevance to local industries, stakeholder feedback, and integration of national priorities into the curriculum.

1.1.5. Integrated sustainability practices

- Integrate sustainability practices into educational programmes and operations, aligning with local environmental and development goals, and reducing environmental impacts in both regions.

1.2. Maturing stage (After year 3)

1.2.1. Sustained benefits for students

- Enhance career development and global mobility through more international internships, job placements, and two-way exchanges between the UK and host institutions.
- Demonstrate graduate career success and adapt educational access to meet domestic and global market needs.
- Refine the global curriculum and extracurricular activities to enrich student experience.

1.2.2. Advanced institutional development

- Elevate educational excellence and capabilities through sustained CPD programmes for faculty.
- Foster and expand research and academic collaborations.

1.2.3. Equitable knowledge and resource sharing

- Promote balanced knowledge exchange and equitable resource sharing, including designing co-curricula between UK and host institutions.

Indicators for mutual benefits

- Percentage of graduates employed or pursuing further study within six months; growth rate in student enrolment in TNE programmes; participation rates in internships, exchanges, and job placements.
- Percentage of faculty engaged in CPD programmes and joint research; growth in joint research projects and faculty exchanges.
- Number of co-designed curricula and collaborative projects; number of roles filled by each institution and number of tangible benefits, including funding, shared between institutes.
- Percentage of programmes developed or adjusted based on feedback from employers and stakeholders; alignment of programmes with local and market needs.
- Changes in global rankings, partnership growth, and reputation survey scores; extent of integrated sustainability practices in programmes and operations.

2. Financial viability

2.1. Developing stage (Year 0-3)

2.1.1. Market viability assessment

- Conduct market research on demographics, student demand, fee structures, and competitors.
- Analyse regulatory and legal requirements, including qualification recognition.
- Assess political and economic stability and develop contingency plans.
- Define risk tolerance and limits on Return on Investment (ROI) and sunk costs.

2.1.2. Strategic business case development and alignment

- Align the TNE business case with strategic goals, including student projections, tuition structure, and revenue forecasts.
- Evaluate the TNE model for its impact on finance and operations, considering whether it requires extensive collaboration or offers more autonomy in decision-making.

2.1.3. Student enrolment growth strategies

- Build institutional reputation to attract students and offer graduate pathways.
- Align growth with market demands emphasising complementing rather than duplicating domestic provision, as well as fostering industry partnerships and internships.
- Improve student services and extracurricular activities to enhance retention and satisfaction.

2.1.4. Operational efficiency and technological integration

- Integrate technology and operations while aligning administrative processes and student services across UK and host universities.
- Develop HR plans with a focus on local and international recruitment.

2.2. Maturing stage (After year 3)

2.2.1. Achieving self-sustaining operation and ROIs

- Attain full self-sustainability and achieve a positive return on investment through effective management of initial capital and ongoing operational costs.

2.2.2. Exploring expansion and diversification

- Continuously conduct competitor analysis and monitor the competitive landscape, including new TNE entrants and government's TVET initiatives.
- Develop new programmes to expand offerings and market presence through regional partnerships or by replicating successful models in new regions. Assess staff workload, resource needs, and other due diligence factors to support sustainable expansion.

2.2.3. Diversification of revenue streams and strategic partnerships

- Expand revenue sources beyond tuition fees by establishing partnerships with other educational institutions, industry, and government bodies.

2.2.4. Sustainable operational practices

- Adopt and integrate sustainable practices and technologies among university campuses to ensure cost efficiency.

Indicators for financial viability

- Completion of market research, regulatory analysis, risk assessments, and competitor analysis; alignment score of the TNE business case with strategic goals.
- Growth rate of student enrolment vs. demand forecast; percentage increase in student satisfaction and retention; number of new programmes launched.
- Cost savings from integrated technology and operations across campuses; achievement of break-even and ROI.
- Percentage increase in revenue from non-tuition sources; number of new strategic partnerships; percentage of operations adopting sustainable practices; reduction in environmental impact metrics.

3. Partnership breadth and depth

3.1. Developing stage (0-3 years)

3.1.1. Education: Development of degree programmes

- Develop programme offerings meeting the demands of the host institutes/countries, focusing on expanding or diversifying offerings, including graduate-level programmes.
- Cultivate ties with regional institutes or industry partners.

3.1.2. Research: Increase capacity for collaborative research initiatives

- Enhance research collaboration by supporting graduate students, facilitating two-way exchanges, and establishing communication channels.

3.1.3. Operation: Initial integration and system implementation

- Analyse and integrate system and administrative practices to enhance operation efficiency, with hosting institutes (including IBC) adopting best practices from UK campuses.
- Assess the implementation and effectiveness of integrated administrative and technological systems.

3.2. Maturing stage (After year 3)

3.2.1. Education: Programme enhancement and strategic expansion

- Regularly review and adjust degree programmes to align with global trends and industry demands, maintaining strong relationships with governments and industry to ensure relevance and impact. Expansion should only be pursued if it supports these goals.

3.2.2. Enhanced research and innovation collaboration

- Expand research initiatives through joint project funding and strengthen researcher connections. Focus on advancing research impact and improving academic

3.2.3. Operational: Advanced integration and optimisation

- Optimise systems, supporting data integration for strategic analysis and the replication of successful models across institutes.

Indicators for partnership breadth and depth

- Number of new programmes launched annually and percentage increase in offerings.
- Number of new partnerships with regional institutes and industry.
- Number of joint research projects and researcher exchanges.
- Percentage of systems integrated and operational efficiency improvements, as measured through system metrics and user feedback.
- Growth in programmes aligned with global needs and replication of successful models.

4. Effective leadership and people development

4.1. Developing stage (Years 0-3)

4.1.1. Strategic leadership and stakeholder engagement

- Measure leader effectiveness in managing relationships with investors, university boards, and regulatory bodies throughout the partnership lifecycle.
- Assess leader effectiveness in aligning the development plan of the strategic goals of UK and the host universities.

4.1.2. Distributed leadership development

- Establish governance structures that ensure collaborative decision-making and involve diverse stakeholders (students, academics, staff).
- Evaluate collaboration between UK and local leaders in managing operations.

4.1.3. HR policy and people development

- Establish operational policies on academic freedom, equity, diversity, and inclusion policies while integrating local cultural understanding and ensuring inclusivity.
- Develop clear job roles, particularly in joint or dual degree arrangements, where academic responsibilities may be shared.
- Develop an HR plan that includes professional growth opportunities for staff.

4.2. Maturing stage (After year 3)

4.2.1. Sustained distributed leadership practices

- Evaluate the effectiveness of leaders in both sending and hosting institutes in managing relationships with investors, university boards, and regulatory bodies, and assess how well they align the development plans of UK and host universities with shared strategic goals.
- Review the effectiveness of collaboration between UK and local leaders in managing operations and driving joint initiatives.

4.2.2. Ongoing policy review and improvement

- Evaluate the effectiveness of policies on academic freedom, equity, diversity, and inclusion.
- Review job role clarity.
- Assess and update the HR plan for staff development.

Indicators for effective leadership and people development

- Number of stakeholder engagements and strategic goals achieved.
- Number of joint committees and review meetings, with stakeholder involvement (students, academics, staff).
- Staff satisfaction related to clarity of job roles and professional development opportunities.
- Number of ongoing stakeholder engagements and joint initiatives, effectiveness of policy reviews, and updates to HR plans based on feedback and development needs.

5. Mutual trust and open communication

5.1. Developing stage (Year 0-3)

5.1.1. Building initial trust and effective collaboration

- Establish both formal and informal communication channels to foster mutual exchange and understanding between members in both institutions.
- Provide induction training to international (including fly-in) faculty to address cultural and work environment adjustment, fostering effective working relationships.

5.1.2. Managing student and parent expectations

- Develop and assess strategies to manage student and parent expectations through satisfaction surveys and ongoing engagement.
- Offer training on academic freedom to students to ensure clarity and adherence to institutional policies.

5.2. Maturing stage (After year 3)

5.2.1. Enhanced collaboration and continuous improvement

- Assess the effectiveness of both formal and informal communication channels and make improvements based on feedback from faculty, staff, and students.
- Co-develop and implement advanced training programmes to address cultural adjustments and integrate lessons learned from initial phases.

5.2.2. Advanced management of student and parent expectations

- Regularly review satisfaction surveys and communication feedback to refine strategies for managing student and parent expectations and address emerging issues.

Indicators for mutual trust and open communication

- Number of communication channels established, percentage of faculty completing induction training, and follow-up surveys on effectiveness.
- Percentage of positive feedback in surveys and focus groups, number of academic freedom training sessions, and frequency of communication channel reviews and improvements.

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