

# INTERNATIONAL EDUCATION CONFERENCE

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## MENA and Gulf countries: UK study updates

#IES2019

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## Presentation content:

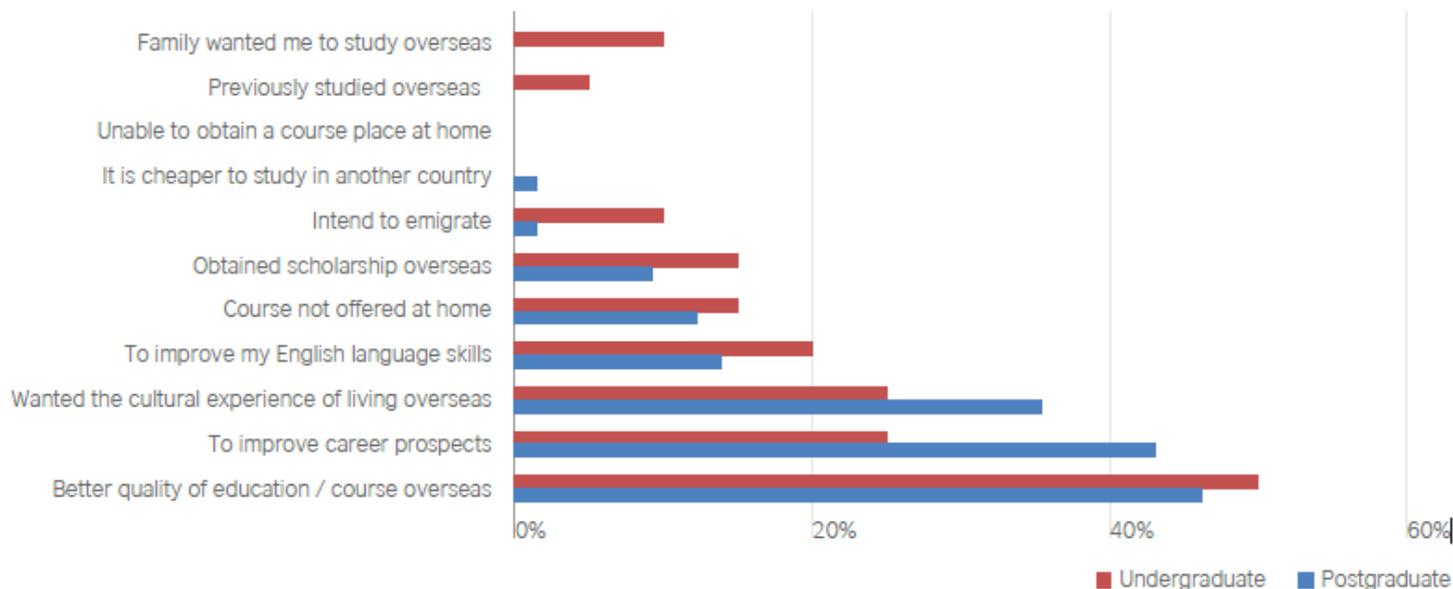
1. MENA pull factors for an international education
2. UK as preferred study destination
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5. Study UK influencers
6. Scholarship opportunities
7. Market opportunities

Questions to the MENA panel

# MENA Pull Factors for an International Education

# International education pull factors: Example Morocco

## Factors driving study abroad decision



Source: British Council Student Insight

# UK as preferred study destination

# International education pull-factors for MENA countries

In MENA countries UK remains a popular study destination for overseas studies.

Motivations to study in UK (VRS data):

- High academic standards - choice of top-ranking universities
- International recognition of qualifications
- World-class teaching
- Relative geographical proximity
- Multicultural environment - sense of inclusivity and tolerance
- Safe environment
- **Post study work opportunities**
- Cost effectiveness (weaker £)
- Local universities' teaching quality does not fully meet the full potential of young people and the market needs in terms of post graduation **employment opportunities**
- Opportunity to improve English language skills

# UK as preferred study destination

- Over the last year, Brazil, Bangladesh, **Kuwait, Qatar**, Indonesia and Libya are among the largest markets in both growth rate and total growth for **sponsored UK study visas**.
- **UAE:** Increase in student flow to UK by 11% - from 4228 to 4705 (22% are UAE Nationals). 67% Undergraduate, 33% postgrads. Business and Administrative studies is still most popular choice, followed by Engineering and Technology and Social Studies.
- **Saudi Arabia:** UK is the second top destination for Saudi sponsorship student holders Over 9000 students follow Further and Higher Education programmes in the UK. T4 visas increased by 21% over 2018 (to 4,568, Q1-Q3).

## UK as preferred study destination

- **Bahrain:** UK remains the **number 1 destination** for students leaving Bahrain, with over 1500 students.
- **Egypt:** UK is the **fifth destination** for the Egyptian students studying abroad (after USA, France, Germany and Canada). Egypt is one of the largest TNE providers in MENA, more than 20,000 students studying UK qualifications in Egypt. (Source: HESA). T4 visas increase of 13.8% over 2018 (Q1-Q3, 1,624)
- **Kuwait** - T4 visas increase of 5.7 % over 2018 (Q1-Q3, 3,344)
- **Oman** - T4 visas increase of 12.8 % over 2018 (Q1-Q3, 1,493)

# MENA countries and study trends

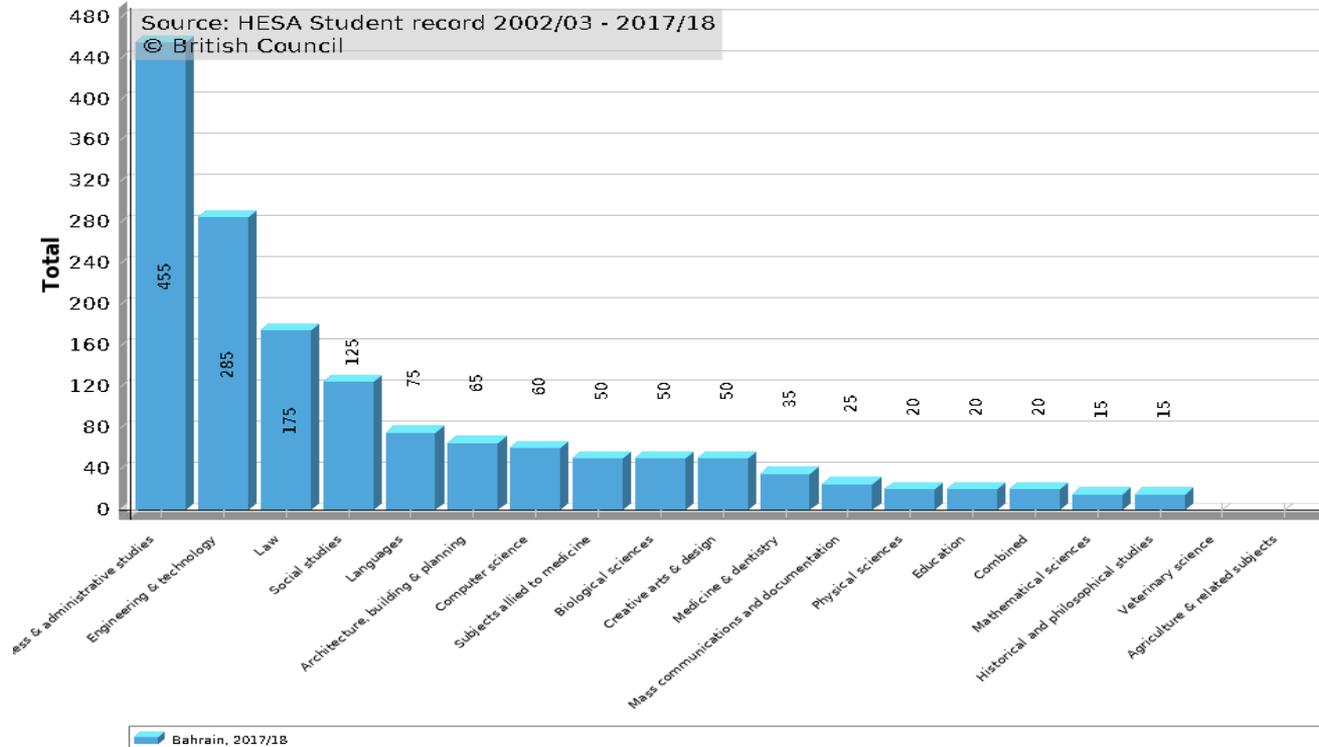
## MENA countries study trends

- **Traditional subjects** e.g. **medicine, engineering and technology, business and administration** and **management** still favoured by MENA students overseas and continue to be the most popular subjects over the last decade at both UG and PG levels.
- Growing interest in **STEM subjects, health, and tourism** – in line with efforts to diversify oil based economies.
- **Diversification of subjects** is strongly encouraged in order to achieve National Visions 2030. At UG level, **Computer science, Social Studies** and **Law** have increased in popularity.

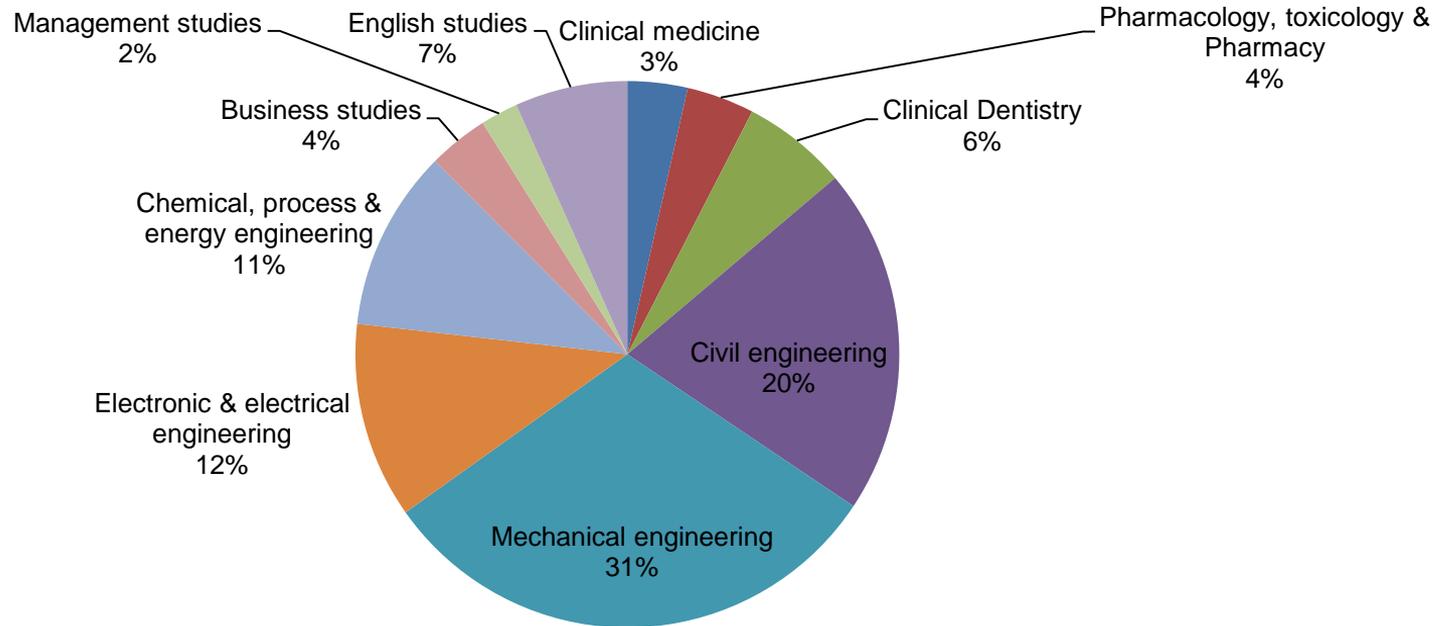
## MENA countries study trends

- Reinforced focus on **employability and skills with labour market relevance** reflected in scholarship programmes.
- According to the UIS data, Gulf nations like **Kuwait, Qatar, Oman** have also been sending a significant number of students within the region to **Jordan, Egypt** and the **UAE (highest number of international branch campuses)** - all of which are positioning **as regional tertiary education hubs**.
- **Saudi Arabia** - Fiscal constraints and with Vision 2030 focusing on improving the quality of education at home, the number of students seeking higher education abroad is likely to diminish – i.e. the *Elite scholarships programme* will have more restrictive qualification requirements and focus on a narrower range of subjects and target universities.

# Bahrain students in UK: overall trends

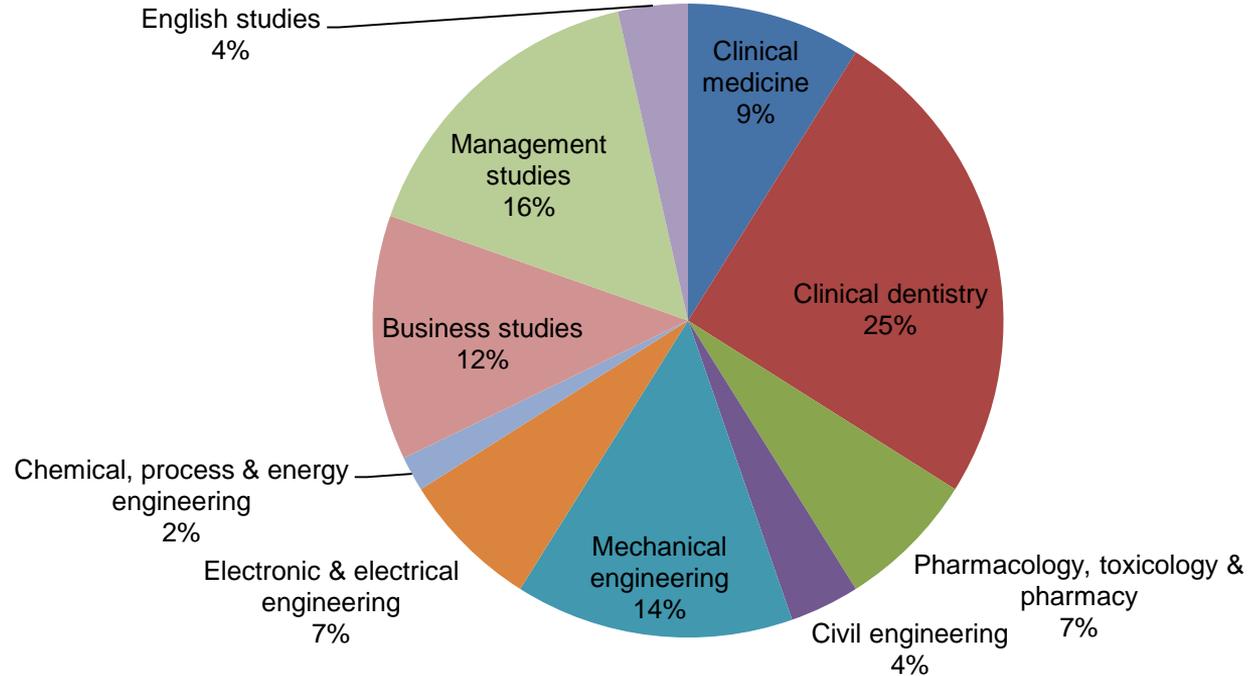


# Kuwait top 10 subject areas: undergraduate degrees



## Principal Subject Kuwait UG Marker 2017-18

# Kuwait top 10 subject areas: Postgraduate taught courses



## Postgraduate taught courses: Kuwait 2017/18

# International Student Employability

# Student employability and UK degrees

- A UK qualification is well regarded however, the main challenge in many countries across MENA is **attestation and recognition**.
- Only qualifications obtained through face-to-face delivery on full-time basis at institutions on the Ministry recognized lists are attested by MENA Embassies in London.
- In **Qatar** for example, **only 80 UK institutions**, along other international institutions, are listed under the recognised list for self-funded students.

# Study Influencers in MENA

## Study influencers: peers, parents and social media

- **Recommendations** highly valued in MENA societies – **past experiences and success stories** can play a major role in families allowing their children to study overseas, especially if it is within the extended family.
- Common for **parents to be decisionmakers** about studying overseas – their perception, way of thinking/attitude and local beliefs are factors that affect decision of where their children may end up studying. For UG studies, **parents play a key factor, followed by peers**. For PG studies, **ranking of university and peers play a key factor**.

# Study influencers: peers, parents and social media

- **Social media** also plays a considerable role in promoting studies overseas through influencers.
- Social media penetration rates high in Gulf countries e.g. 96% in Kuwait, 85% in Qatar, 23 million in Saudi Arabia, 9.5 million in UAE. **40 million active social media users in Egypt.**
- Online influencers with leading platforms such as Snapchat and Instagram.

# MENA Scholarship Opportunities

# Scholarship opportunities

## Kuwait:

- Kuwait government is offering **generous scholarship programme** encouraging international study as it looks for solutions to the **country's current lack of higher education places**, particularly in specialized areas and at postgraduate level.
- Increase in number of scholarships – are different schemes.
- Number of **MoHE scholarships** to USA = 894, to **UK = 925** for the academic year 2018/19.
- 65% of students going abroad through Scholarships from MOHE/ other organisations are for **engineering related** courses.
- **Oil sector, Public Authority for Disabled** (inclusion) also offer scholarships.

# Scholarship opportunities

## Qatar:

- Generous **state scholarship programme** covering different English courses, degree programmes and degree levels available to Qatari nationals managed by MoHE, on behalf of the public sector.
- 65 UK institutions, along other international institutions are listed under **the Government Scholarship List**
- **Oil and Gas scholarships** managed mainly by Qatar Petroleum.
- **Qatar Airways** is one of the main scholarship providers.

# Scholarship opportunities

## United Arab Emirates:

1. Abu Dhabi Investment Authority
2. Abu Dhabi National Oil Company
3. Abu Dhabi Police
4. Al Ghurair Foundation
5. Department of Education and Knowledge
6. Dubai Police
7. Emirates Nuclear Energy Corporation
8. Entaliq Scholarship Programme from Mohammed bin Rashid Space Centre
9. HH Sheikh Hamdan bin Mohammed Scholarship for Veterinary Medicine
10. ICT's Betha Scholarship Programme
11. Ministry of Education
12. Ministry of Presidential Affairs
13. Sheikh Saqr Student Enrichment Program
14. UAE G.H.Q Armed Forces

## Challenges:

- **Selected universities** for scholarships

# Scholarship opportunities

## Saudi Arabia:

- The Saudi Scholarship programme is the **third-largest** scholarship programme after China and India (source: LSE research into Partnership Opportunities in Higher Education in Saudi Arabia).
- As of Feb 2019, the total number of **Saudi scholarship student holders in the UK was 14,614** making up 15.7% of total students overseas. The US remains top with 51,083 scholars, equivalent to 55%.
- The third stage of the *Custodian of the Two Holy Mosques'* overseas scholarship programme comes to end in Dec 2019 - the budget for **new scholarship funding cycle** is not yet confirmed.

## 7 scholarship programme tracks available to **Saudi** students:

- Your Job and Your Scholarship
- Health scholarship
- Elite scholarship
- MISK fellowship
- Mawhiba scholarship
- International scholarship
- Enrollment of self-funded students into select scholarship programme

### كيف تحصل على بعثة دراسية في الخارج برنامج خادم الحرمين الشريفين للابتعاث الخارجي



# KSA Scholarships (cont.)

## 1. Elite Programme (MoE):

Scholarship to Top 20 Universities around the world.

**Four** top-ranking universities located in the UK:

- University of Cambridge
- University of Oxford
- Imperial College London
- London School for Economics and Political Sciences

Ministry of Education has plans to **increase UK universities** under this programme and widen range of courses to be sponsored.

# KSA Scholarships cont.

## 2. Your Job and Your Scholarship:

Offering a Scholarship depends on **available careers in private sector**.

It targets **top 200 universities** around the world. 61 of the universities located in United Kingdom.

## 3. Health programme:

Scholarship in **rare medical majors** and targets **top 104 universities** around the world.

# MENA Market Opportunities

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Education remains at the forefront of national strategic plans in MENA, and is set to be a **key priority** on the agenda of the G20 Summit which will be hosted by Saudi Arabia in 2020.

For example, education objectives in Saudi Arabia's Vision 2030 are;

- Reach top 10 countries in the Global Competitiveness Index (ranked 36<sup>th</sup> out of 140 countries in 2018);
- Have at least 5 Saudi universities in the top 200 universities internationally.

MENA **national strategic plans** include:

- increased educational opportunities and training for the **fast growing youth populations**
- ensuring graduates have the relevant skills to meet the **job market requirements**.

# MENA Market Opportunities

**UAE:** World's First **University of Artificial Intelligence** Opens in 2020: responding to projections estimating a global business value derived from AI reaching almost \$4 trillion by 2022.

**Saudi Arabia:** In a significant shift from past practice, the Government now seems ready to **invite foreign universities to establish branch campuses** in Saudi Arabia. New regulations are set to **increase autonomy** of universities and increase differentiation in their offerings and quality (TNE opportunities).

New law passed in Aug 2019 where Saudi women do not need consent from male guardians to travel - this may affect parents influence on overseas study in the longer-term.

# MENA Market Opportunities

**Morocco** - New G2G **partnership agreement** (Jan 2020) on Higher Education. Objectives include student mobility and TNE.

**Egypt** - **Growth market** (over 13% annual increase), large youth population, improving economic situation, one of the largest TNE opportunities in MENA.

**Qatar** – A new driver for **non-Qataris student recruitment** (80% (18,850 students) are non-Qataris studying at private secondary schools), New G2G MoU under development which partially addresses mapping of the two countries qualifications frameworks, considering recognition of professional bodies qualifications and vocational qualifications; Stronger Qatar-UK Alumni network who are willing to advocate UK education

## MENA countries panel

# Questions?