

### Market Focus – Emerging markets in the Maghreb

*This report first appeared in the SIEM Middle East and Africa regional newsletter, September 2014.*

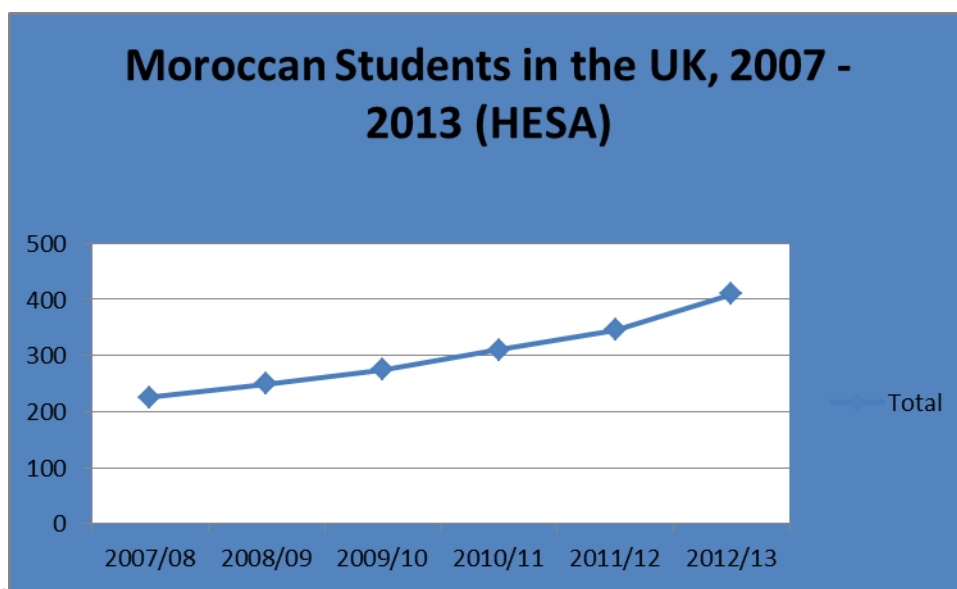
The three countries which form the Maghreb region, Morocco, Tunisia and Algeria, have not in recent years been a focus for student recruitment activity by UK universities. Strong linguistic and historical ties with France meant that most students seeking overseas higher education looked to the former colonial power for opportunities. However, following the transitions and changes brought about by the Arab spring movement, coupled with shifts in trade patterns, the waning influence of the Hexagon, and a growing recognition of the importance of the English language for ensuring individual and national economic success, the region now presents opportunities for the UK higher education sector. The three countries have a combined population of 83 million people, (17 per cent of which is between the ages of 15 and 24), rising literacy rates, and a thirst for change.

France has historically been the most popular destination for students from North Africa due to the close linguistic and cultural ties, and the very low (in some cases non-existent) tuition fees in its public universities. However, the three countries share a common problem. Rising graduate unemployment at home, indicating in part that students are not able to acquire the skills and knowledge they need at national universities, coupled with a major brain-drain of qualified, overseas-educated graduates who often choose not to return from their studies overseas, are creating a crunch in the labour market which will adversely affect the ability of the three countries to achieve their economic objectives. There is therefore a need to take action, and the governments in each of the three countries are responding in different ways.

#### **Morocco**

Morocco, a country of 32.9 million citizens, began a major education reform process in 2008, aiming for systemic improvements from pre-school through to higher education. Priorities included addressing the relatively high rate of illiteracy, extending compulsory education to the age of 15; promoting a culture of excellence and achievement in schools, improving the programme offer and promoting a research

culture in higher education, and improving careers advice and guidance to young people. The reform programme, called programme NAJAH, also aimed at improving the teaching of foreign languages, in particular English. While there has been some criticism of the effectiveness of the reforms, the Moroccan government has invested 3 billion dirhams in the programme to date; and according to UNESCO figures, the student population in Morocco increased by a huge 37% between 2007 and 2011, to over 500,000. Interest from Moroccan students in studying in the UK continues to grow, with the numbers of students enrolling increasing every year (see graphic), the majority in Business and management and engineering



and technology subjects.

With France no longer automatically granting Moroccan students residency on completion of higher education, the inexorable rise of the English language, and Moroccan universities reaching full capacity, there is a clear opportunity for UK institutions to offer alternatives to the traditional pathways through higher education.

## Tunisia

Tunisia's student population has grown by 11% since 2007 and is estimated by UNESCO to stand at around 336,000. In the same period, the number of students studying overseas has increased by 17%, the majority in France. The numbers of Tunisian students in the UK barely changed over the same period.

Graduates were key players in the 2010 revolution in Tunisia. Their disenchantment with their perceived lack of a future helped lead to action on the streets and the eventual fall of the dictatorship.

Improving the current higher education system and creating more opportunities for young Tunisian graduates is therefore seen as critical to the success of post-revolution Tunisia. Tunisia has recently

announced a major education infrastructure investment project, part of **Tunisia Economic City**, a major mixed-use industrial, commercial and residential development which is estimated will cost around 50 billion USD. "[University City](#)" will include international branch campuses, research facilities and a medical school, and has the dual aim of encouraging young Tunisians to stay in Tunisia to study, and to provide employment opportunities for its graduates. As well as benefiting young Tunisians, the project also aims to attract students from other countries across the Arab world to its facility, potentially competing with TNE hubs in the UAE and Qatar. This is the first major TNE project announced in the North Africa region, and with a completion timeline of 15 years, is at the very early stages. The project is, however an indication of the commitment of the Tunisian government to provide new opportunities for its young people.

Many Tunisians feel that the French model of higher education, which has been in place since independence, and seen as very inflexible, has now run its course. This shift presents the beginning of new opportunities for the UK sector in student recruitment, and in developing institutional partnerships, as new opportunities such as University City take shape, and as the HE sector seeks reform. There are also a growing number of Libyan families taking refuge in Tunisia from the deteriorating situation at home.

Further information is available in the Tunisia Market Introduction. Please click [here](#) to read.

## Algeria

Algeria is the largest country in North Africa, and has a population of 38 million, the second largest population in the MENA region. It is rich in natural resources, which provide 60% of the country's income, has large foreign currency reserves, and no debt. There are a number of large UK businesses operating in Algeria, and the UK is an important trading partner. It has a student population of around 1.18 million (UNESCO), including those overseas.

Yet despite these favourable conditions, the number of Algerian students studying in the UK is still very small – although this now looks set to change.

In the 1960s and 70s thousands of Algerians were studying in the UK – however the years of civil war during the 1990s halted most of the country's international education and cultural programmes. Although the number of Algerian students recovered a little in the mid-2000s to around 450, numbers fell again in 2012 to 215.

As in its neighbouring countries, graduate unemployment is becoming a major problem in Algeria, and the advantages of an English-medium education, particularly in disciplines which may lead to employment in both the traditional areas of oil and gas and in the hoped-for diversified economy, is increasingly recognised.

In January 2014, a work programme was agreed between the UK's Foreign and Commonwealth Office and the Algerian Ministry of Higher Education and Scientific Research to send 500 government-funded PhD scholars in English to UK universities over the next five years. This is part of an ambitious Algerian plan to partner with the UK to build capacity in English in universities and to diversify its international partnerships into the Anglophone world. A delegation of Algerian academics has already been to the UK to meet counterparts in the UK, and the first round of scholarship applications has been approved. The PhD programme will attract a lot of attention from young Algerians, and it is essential that UK universities engage now and take advantage of the new interest in the opportunities which UK higher education has to offer. Algeria is regarded as politically stable, relatively untouched by the Arab Spring, and announced two major waves of investment in development of its infrastructure, healthcare and education systems.

ENDS