



# SERVICES FOR INTERNATIONAL EDUCATION MARKETING

## **Maghreb Market Introduction**

Algeria, Tunisia and Morocco

21 October 2014

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# Welcome!

- Who we are....
- Chair :
  - Helen Kidd, regional advisor, MEA, SIEM, British Council
- Presenters :
  - Hayet Messekher, Assistant Director Programmes, British Council Algeria
  - Amina Elabdellaoui, Education Projects Manager, British Council Morocco
  - Sana Ajmi, Project Manager, British Council Tunisia
- Agenda
  - Why the Maghreb?
  - Country Introductions (12 minutes each)- Algeria, Morocco, Tunisia
  - Q and A with country representatives
  - Summary and Follow-up

# Why the Maghreb, why now?

- Common themes across the countries :
  - Waning influence of France and the French language - Rising Interest in English, and the Anglophone world
  - Issues of youth unemployment, even more acute for graduates
  - Mismatch between HE programmes available and needs of industry and employment
  - HE in country does not deliver on skills, languages, knowledge needed for new economy
- Why now?
  - Currently only patchy engagement from UK institutions in the region
  - Real opportunity to build relationships at an early stage in this transition
  - British Council also stepping up our work in these countries across English and Education

# Country Introductions – Algeria



- **The People's Democratic Republic of Algeria** is located in North Africa.
- President: Abdelaziz Bouteflika.
- The capital and most populous city is **Algiers**.
- The 10<sup>th</sup> largest country in the world by area (2,381 km<sup>2</sup> (919,595 sq mi)).
- Population 38 million, **48% is under the age of 24**
- Languages spoken: Algerian Arabic, Tamazight, Modern Standard Arabic, French, English.
- Religion: 99% Muslim Sunni
- Major cities: in the East: Constantine, Annaba, Sétif, Batna; West: Oran, Tlemcen, Mostaganem; South: Adrar, Ourgla, Bechar, and Tindouf.
- Currency: Algerian Dinar - DZD



# Social and economic overview

- Algeria is now one of the more stable nations in the North Africa region.
- It is an important security and trade partner for the UK.
- It is rich in natural resources and has a predominately oil-based economy.
- Because of Algeria's political stability, its economy continued to perform solidly in 2013 (growing by 3%)
- And has **strong foreign exchange reserves.**
- Unemployment fell slightly in 2013, standing at 9.8% in September.
- **Algeria spent 20.3% of its government expenditure and 4.3% of GDP on education in 2008** (Source: World Bank)
- Literacy rate is 91.78 % (Source: UNESCO)

# Education System Overview

- Education in Algeria is free : compulsory from ages 6-16.
  - Pre-primary education: 1 year, age 5
  - Primary education: 5 years, age 6-10
  - Middle school: 4 years, age 11-14
  - High school: 3 years, age 15-18
    - Two major options: Letters or Science and Technology
    - High school graduates receive a
- Arabic is the medium of instruction
  - French is a school subject introduced in Grade 4
  - English taught from Grade 6.

# Higher Education System

- In Higher Education all specialisms are offered:
- There are 97 different HE institutions throughout the 48 wilaya (cities).
- The Bologna process was adopted in 2004, with the LMD system:
  - License: 3 years – 180 credits
  - Master: 2 years (Master 1 and Master 2) – 120 credits
  - Doctorate: 3 years
- In 2010/2011, there were 1,077,945 undergraduate students in different disciplines

	Exact Sciences & Technology	Natural & Earth Sciences	Medical and Veterinary Sciences	Social Sciences & Humanities	Total
2009/10	200,036	82,111	53,847	698,319	1,034,313
2010/11	231,156	88,667	57,254	700,868	1,077,945

- Since the early 2000's, developing capacity in English has become a government priority.

# Algerian Students Overseas

The top 5 overseas destinations for HE for Algerian students:

1	2	3	4	5
France (89.8%) 21052	UAE (1,0%) 239	Spain (0.9%) 208	KSA (0.8%) 187	UK (0.8%) 186

(source : CampusFrance)

Number of Algerian students in the UK:

Country of Domicile	2011/1	2012/1
	2	3
Algeria	225	215

(source : HESA)



# Increasing English language capacity

- English is now a national priority:
  - for the Algerian Government – “Marshall Plan”
  - There is huge demand from students, the public, and from corporates to improve the level of English.
- In January 2014, the UK signed a work programme with the Ministry of Higher Education and Scientific Research to build capacity in HE in ELT (PhD Programme)
- In September 2014, a MoU was signed with the Ministry of Education Strategic English Educational Development for Schools in Algeria.
- 1300 Algerians take IELTS annually.
- The National Institute of Petroleum uses English as a medium of instruction\*.
- English is increasingly perceived as a necessary employability skill

## Opportunities and challenges for student recruitment in Algeria

- ELT : There is an exponential demand for ELT courses (EAP, ESP).
- Foundation programmes : are not a de facto requirement by UK universities (depending on the grade obtained in the Bac) but some pre-sessional English courses are sometimes needed
- Currently the market is predominantly for Postgraduate studies
- As English levels improve, more Algerians will be able to access undergraduate programmes
- PhD : Under the Work Programme signed in January 2014, the Algerian government will fund 500 PhD scholars in English in UK universities.

However,

- Visa remains the biggest challenge for students considering the UK.
- IELTS score requirements are another obstacle.

# Partnerships and Collaboration opportunities

Major opportunities include:

- The PhD scheme is a major opportunity for UK universities.
- Many possibilities of collaboration with HE institutions under the Erasmus+, Linneus Palme, and Horizon 2020 programmes.
- There is longer term potential for the UK to engage in consultancy and collaborative projects with both Ministries of education.

Major challenges remain:

- Mobility : visa clearance, and
- IELTS scores

# Summary – ALGERIA

- A clear shift in language planning to make English a priority.
- **English** doesn't have the colonial baggage that French has in Algeria
- Algeria is turning to the UK to realise its ambitious agenda of ELT and English for employability skills.
- The fully funded PhD scheme is at its inception, and there is a lot of potential there.
- The Ministry of National Education is revising the textbooks, English curricula, in-service teacher training in collaboration with the **British Council** and there is a lot of potential to engage UK universities in consultancy and in collaborative projects as well with both Ministries of education.

# Country Introduction – Morocco

- **Capital:** Rabat
- **Population:** 33.01 million (2013)
- **GDP Growth:** 4.4% (2013)
- **Inflation:** 1.9% (2013)
- **Source:** World Bank



# Economic Indicators

- Morocco is an emerging economy within North Africa
- Traditional economic sectors: tourism, agriculture have proved to be unpredictable and hard to sustain
- New emerging sectors: aeronautics, equipment and manufacturing
- Proximity to EU markets and low production costs are attractive to multinational companies
- Unemployment rate estimated to around 9% in 2011 (Euromonitor International) is of concern to the government
- Government trying to restructure economy with focus on private sector

## Social indicators

- Culturally speaking, Morocco has always been successful in combining its Berber, Jewish and Arabic cultural heritage
- People are open to new technologies and advancements
- Morocco is the first country in North Africa to install a 3G network – now 70% coverage of 3G in major cities.
- The number of Internet subscribers in the country jumped 73% in 2006 over the year-ago period
- ADSL available in all cities. Connectivity is reliable at 99.9%

# Language/ Religion

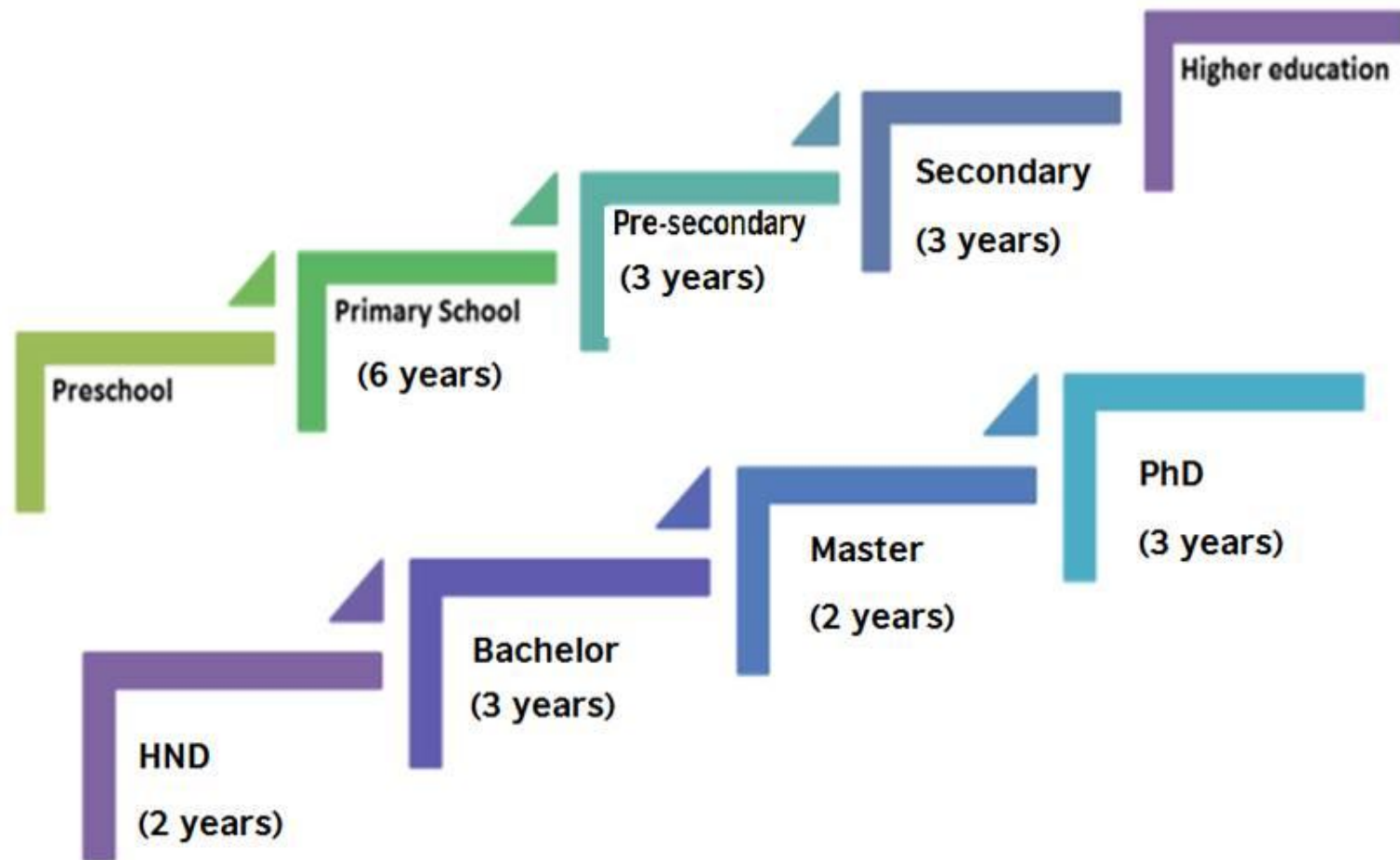
- Arabic is the official language but French is the dominant business language in central and southern Morocco : Spanish is often spoken in the North
- English is fairly widely spoken (according to Euromonitor 's report 14% speak English)
- The Berber languages are also widely spoken
- Islam is the established state religion of Morocco - about 1 percent of the population is Christian, less than 0.2 percent Jewish



# British Council in Morocco

- Operational since 1961
- Offices in Rabat and Casablanca
- Areas of work:
  - ✓ English and Exams
  - ✓ Education (SIEM, School links, IHE, Skills, Research projects)
  - ✓ Arts
- The British Council in Morocco has been offering SIEM services since 1 April 2014.
- The first Education UK exhibition will take place in Rabat and Casablanca between 29-31 January 2015
- [www.britishcouncil.org.ma](http://www.britishcouncil.org.ma)

# School and Higher Education: public / private



# School education in Morocco

- Moroccan schools are organized on a three cycle, 6-3-3, model
- Primary enrolment is now high : 4 million children in primary
- Pre-secondary enrolment rates are rising fast, from 60.3% (2000) to 79.1% (2010).
- Secondary education, has advanced from 37.2% enrolment (2000) to 52.8% (2010)
- Sources: UNICEF Statistics at a Glance [http://www.unicef.org/infobycountry/morocco\\_statistics.html](http://www.unicef.org/infobycountry/morocco_statistics.html)
- UNESCO EFA/EPA Report 2011

# Higher Education in Morocco : Institutions (2013-2014)

15 Public Universities

118 Faculties and schools

3 3 Universities under public/private partnership

55 HE institutes not depending on MoHE

5 Private Universities

211 Private institutes

1 Public University with private management

# HE in Morocco – Student statistics

Total Number of Students in HE	610,682
% enrolment in public HE institutions	89%
% enrolled in private HE institutions	6%
% enrolment in public institutes not dependent on MoHE	5%
Total number of graduates in 2011/2012	59,249

# Key areas of HE reform

New University Governance	New management system; international collaboration
New missions State /Universities	Redefining the role of the State in HE; autonomy and extending the scope of institutions
Contracts State/Universities	Decentralising university management;
Quality Assurance Systems	Developing quality assurance awareness

# Numbers of Moroccan students abroad and in the UK

- **France:** 32 104 (2012-2013 data)
- **Spain :** 3 117 (2011 data)
- **Germany:** 2 861 (2011 data)
- **Italy:** 1 715 ( 2011 data)
- **Canada:** 1 344 (2010 data)

## Source:

[http://ressources.campusfrance.org/publi\\_institu/etude\\_prospect/stats\\_pays/fr/maroc\\_fr.pdf](http://ressources.campusfrance.org/publi_institu/etude_prospect/stats_pays/fr/maroc_fr.pdf)

# Moroccan students in the UK

Academic year	Total
2007/08	225
2008/09	250
2009/10	275
2010/11	310
2011/12	345
2012/13	410

Source: HESA Student Record  
© British Council



## English in Morocco

- Demand for English is growing as key skill for employability
- In 2013, the Ministry of School Education approached the British Council to implement an English Baccalaureate option
- From January 2015, newly-appointed professors and doctoral students in the sciences will be required to demonstrate competency in English
- One or two HE private intuitions teaching in English: Al Akhawayn, IIHEM, Sunderland
- IELTS candidate numbers are growing – 1800 candidates in 12 months to June 2014

# Opportunities and challenges for student recruitment in Morocco

## Opportunities

- Morocco's proximity to markets in Europe
- English is growing in popularity among young Moroccans: Demand for studies in Anglophone countries
- Higher education outcomes do not meet the needs of international organizations and companies
- Scholarship programmes: Chevening programme in Morocco
- Foundation programmes is very popular for students studying in UK though Moroccan Bac is accepted at with grade of 12/20 and appropriate IELTS score.
- The number of IGCSE candidates in Morocco is growing

# Challenges....

- High tuition fees in the UK compared to France, Spain...
- Stricter immigration rules for student visas
- The UK education sector has low profile in Morocco
- Agents market is not established in Morocco
- Education fairs in Morocco run by individual agents are of questionable quality
- Increasing number of international joint programmes run by local universities may dilute market size in the upcoming years

# TNE/Partnerships – Examples of current engagement with the UK

- SIST University: with Sunderland and Cardiff Met Universities ; double diploma
- Universities UK mission to Morocco in January
- Ministry of Higher Education launching a new TNE partnership model: Partenariat Publique-Privé

# Market for UK Education

- International qualifications, including the UK Education, are held in high regard in Morocco and are considered to provide individuals with better job prospects.
- Bachelors and Masters courses and short-term courses (summer schools) are most in demand by Moroccans
- The most popular subjects for study in the UK are business-related, tourism, IT and education

# Summary – Morocco

- Morocco is a promising market for international recruitment according to different statistics
- English is gaining a popularity among young Moroccans
- Efforts are now being made to initiate English at primary education
- Government encouraging student mobility and internationalisation of HE

# Country Introduction – Tunisia

- Tunisia is located between Algeria and Libya. It became a French protectorate in 1881 and achieved full independence in 1956.
- Population: c. 10.89 million.
- Tunis is the capital and the largest city..
- Tunisian Arabic is a Maghrebi dialect of the Arabic language, spoken by some 11 million people
- The main second language is French. The educational system is geared to produce bilingualism in French and Arabic, with a few elite schools now focusing on English.
- English is set to become Tunisia's third official language, after Arabic and French and most of Tunisia's official documents are being translated into English now, as well as French.



# Social and economic overview

- **2011 Revolution** : Tunisia is still transitioning after the 2011 revolution.
- Tunisia's political transition gained new momentum in early 2014, with the adoption of a new Constitution and the appointment of a new government.
- **Economy** : Growth slowed, due to increasing political and social instability, as well as the global slowdown. The economy grew by 3.6% in 2012, somewhat above expectations.
- Unemployment continued to decline to 15.3% at the end of 2013, from 16.7% one year earlier, but still well above the pre-revolution level of 13%.



# K-12 Education System

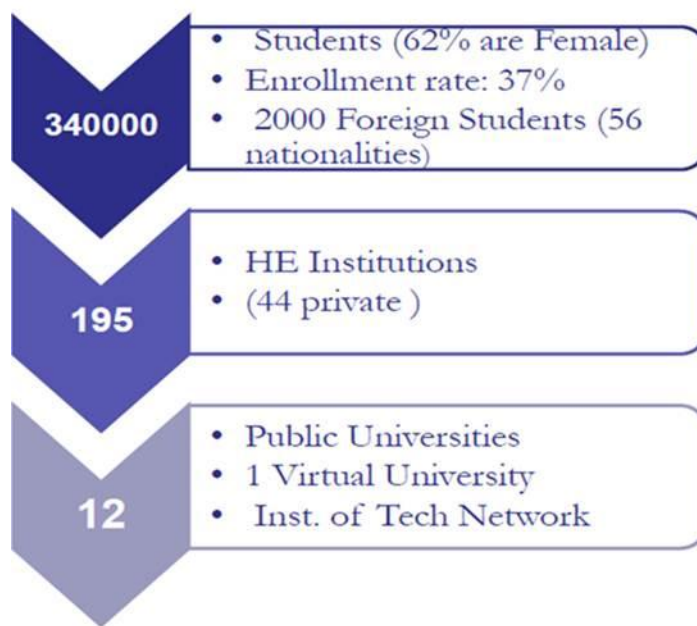
- Education is given a high priority and accounts for 6% of GDP.
- Education is compulsory from 6-16, and is in Arabic except for some science and technical subjects at upper secondary.
- Tunisia's French-based school system consists of pre-school, followed by six years of basic education, and three of lower secondary (or middle school), leading to four years at upper secondary. a year of common curriculum followed by three years of specialisation.
- French taught from the age of 8 : English (introduced from age 12) is rapidly becoming more important
- After graduating from High school, students obtain their Baccalaureate diploma, which is recognizable internationally.

# Higher Education in Tunisia

- Tunisia's university system follows the Bologna Process LMD structure, [Licence, Masters, Doctorate]
- 6.1% of the state budget is spent on the Higher Education system
- One-third of young Tunisians participate in higher education : there were 78,600 graduates in 2010
- Most students study close to their home : this can mean access to University is geographically problematic particularly away from the coastal areas

# Key Statistics - Institutions

## Introduction (1/3). Features of Tunisian Higher Education.



# Tunisia – HE Students and popular subjects

- in 2012 – 74000 university graduates
- 920 different *licence* and Master's pathways
- 48% of graduates are from professional *licences* and masters
- 41% of graduates in STEM subjects

# Higher Education – opening to the UK

- Since the revolution, there has been openness towards strengthening institutional ties with British HEIs;
- Many feel the French model that has been in place in Tunisia since the colonial period has run its course
- Interest across the various disciplines, and in both public and private universities, in integrating English language, curriculum and pedagogical practices to a greater extent into Tunisia's Higher Education system. The British HE system is held in high regard
- Tunisian academics from a diverse range of disciplines are more interested in ever in doing research, attending conferences, accessing libraries, etc. in the UK.
- Tunisian students increasingly look to the UK for study abroad programs as well as scholarship funds for postgraduate study.

# The English language – on the rise

- The British Council has increased its teaching hours by 28% since 2011 due to rising demand for classes
- The British Council is also working with the Ministry of Higher Education on teacher training and capacity building programmes
- English is now a mandatory part of all degree courses

# Student Recruitment – Opportunities and Challenges

- Numbers of Tunisians studying in the UK are still very small following the upheavals of the 2010 Revolution.
- Tunisian students are mobile – 20,000 studying overseas in 2012\*
- The increase in interest in the English language, and the Anglophone world - partly as the key to quality employment opportunities - indicates that people are open to new horizons and opportunities.
- **Challenges :**
  - Lack of knowledge of opportunities due to lower visibility of UK universities
- Majority of Tunisians choose France (59,3 %)\* and Germany (12,6 %)\* – low fees and longer tradition of mobility
- *\*Source : Campus France*

# TNE/Partnerships and Collaboration opportunities

- **TNE** : Tunisia has recently announced a major education infrastructure investment project, part of **Tunisia Economic City**
  - "[University City](#)" will include international branch campuses, research facilities and a medical school,
  - the project also aims to attract students from other countries across the Arab world, potentially competing with TNE hubs in the UAE and Qatar.
- **Research and student mobility** – potential for joint research projects under the European funding programs, Horizon 2020 and Erasmus plus, which the British Council is supporting



# Summary – Tunisia

This is a time of opportunities in Tunisia : the country is in a transitional period with English and the Anglophone world is at the heart of this change.

There are also more than one million Libyan nationals currently residing in Tunisia, many of whom will be enrolling in Tunisian universities this year.

The Tunisia Education UK exhibition ( 27 and 28 January 2015) is an opportunity to meet Tunisian students and academics looking for new opportunities, and many Libyans currently resident in Tunisia

# For more Information

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# Questions?

- Any Questions?
- Please use the “Raise your Hand” button on the left of your screen!
- Please don't hesitate to contact country teams with specific questions
- Individual meetings with country staff will be possible during the SIEM conference in Brighton in December
- Today's slides will be uploaded to SIEM website within 48 hours
- Exhibition information and registration is available on the SIEM website
- Many thanks for your attention.

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