
UK-Saudi Transnational Education

**An overview of Transnational
Education (TNE) in Saudi Arabia,
including opportunities and
challenges for greater UK
engagement**

June 2024

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Executive summary

Saudi Arabia is an important strategic partner of the UK, as well as one of the top sources of international students worldwide. As a result of national policies which aim to diversify the Kingdom's economy beyond the oil sector, Saudi Arabia has invested heavily in higher education with the aim to cultivate globally competitive citizens.

While Saudi Arabia has historically sent large numbers of students abroad, often funded through government scholarships, a shift in priorities set out in the country's Vision 2030 strategy means that the generous scholarship programmes that have historically taken many Saudi students overseas are being scaled back. However, Saudi Arabia is exploring avenues to internationalise its education sector, including through cooperation with overseas institutions in the form of transnational education (TNE).

The most visible form of transnational education is the full branch campus model, and Saudi Arabia is working to attract international partners for this form of cooperation. In October 2023, new Executive Regulations for establishing branches of foreign universities were introduced. The efficacy of this law has not yet been tested as no universities have yet completed the process of setting up a branch campus under the new framework. Some stakeholders report that the process for setting up an international branch campus in Saudi Arabia has not yet been streamlined in practice. Nevertheless, the University of Wollongong (UOW, Australia) and the Arizona State University (ASU, United States) have already taken concrete action towards establishing branch campuses in Saudi Arabia.

At the time of publication, no UK institutions had yet opened a branch campus in Saudi Arabia, although the University of Strathclyde had just announced plans to establish a physical presence within the country in partnership with Princess Nourah Bint Abdulrahman University. However, Saudi Arabia is already among the top 10 host countries in terms of the number of students studying for UK higher education qualifications overseas. The bulk of these students are studying through a single partnership – the Arab Open University's collaboration with the Open University in the UK – while most of the remainder are studying distance learning programmes delivered directly by a UK HE provider. Other current UK TNE in Saudi Arabia is more limited in scale but includes the country's External Joint Supervision Programme (EJSP) in which overseas and Saudi universities jointly supervise PhD candidates, as well as other small-scale partnerships at the postgraduate level. Historically Ulster University formerly worked with the SAAD Nursing and Allied Health Science College of Al-Khobar to deliver bachelor's degrees in Nursing, but this cooperation was designed as a 10-year partnership and has already reached the end of its lifecycle.

The process for establishing other forms of TNE beyond branch campuses is somewhat opaque at both the university and ministry level. A new Law of Universities was introduced in 2019, which was designed to contribute to reducing the dependence of public universities on government funding and (among other reforms) clarified the internal processes these universities must go through to set up overseas partnerships. Recent regulatory changes have also increasingly made quality standards a compulsory part of higher education provision in

Saudi Arabia. Additionally, multiple stakeholders shared that they expect further regulatory changes in the future, specifically to increase the autonomy of universities, particularly public universities, and to refine the role of government actors including the Council of University Affairs.

There are no specific regulations for bilateral collaborative provision such as joint or dual degrees, but these do require the approval of the Ministry of Education in most cases (although a very small number of Saudi universities that do not fall under the remit of the Ministry of Education have greater autonomy to conclude TNE partnerships without the approval of the ministry). The situation surrounding franchised or validated models of TNE is less clear and it is not clear whether they are permitted via the approval of the Ministry of Education. There is, however, enthusiasm within Saudi Arabia about attracting more international collaboration, alongside recognition of the need for greater clarity. Based on our understanding the environment for directly-delivered online programmes without a local partner appears to be the most difficult as these degrees cannot be recognised by the Saudi government, although the number of students following these courses suggest that demand may still exist among private sector employees.

From a student perspective, conditions for TNE recruitment appear strong due to Saudi Arabia's growing youth population, the high regard for British higher education and the high numbers of higher education students from Saudi Arabia studying at UK universities via in-person models. In addition, the Saudi government aims to attract more international students through its "Study in Saudi Arabia" scheme; TNE could also play a role in this strategy through teaching UK degree courses in Saudi Arabia.

Beyond the unclear regulatory environment surrounding non-branch-campus TNE cooperation, major challenges faced by actual and potential UK TNE partnerships in Saudi Arabia include relatively low levels of English proficiency and student readiness, cultural differences, and faculty perceptions of working in Saudi Arabia. However, opportunities for improved cooperation in teaching and research exist across a range of sectors, most notably healthcare, business, technology (especially renewable energy and sustainability), and sports & recreation.

In summary, the overall operating environment is welcoming in terms of enthusiasm to partner with UK universities, but complicated in terms of the processes and different stakeholders involved. Beyond the opportunities available at present, more opportunities for UK universities to engage in TNE in Saudi Arabia may emerge as the landscape continues to mature.

Introduction

The British Council, in alignment with its mission to foster international cooperation and cultural exchange, embarks on a comprehensive examination of TNE in the context of Saudi Arabia.

This report seeks to provide an overview of TNE practices in Saudi Arabia, exploring the opportunities and challenges for greater engagement by the UK Higher Education sector. By delving into the historical evolution, regulatory frameworks, and emerging trends, this study aims to illuminate the landscape of TNE in Saudi Arabia and identify avenues for fruitful collaboration between British and Saudi educational institutions.

The report is structured into two main sections:

- **TNE in Saudi Arabia:** This section seeks to describe the current state of TNE in Saudi Arabia in general, to trace its evolution over time and place these changes in the context of broader economic and policy changes in the country, providing readers with a framework within which to understand the UK's current and potential contribution. It also seeks to provide clarity on the legislative and regulatory environment for TNE in Saudi Arabia.

This section was built using secondary data and statistics from Saudi Arabia's Ministry of Education and General Authority for Statistics, academic papers and the Vision 2030 strategy paper. It also includes an analysis of the 2019 Law of Universities and the 2023 Law governing the creation of foreign branch campuses, as well as its Executive Regulation and associated application forms. Where relevant, gaps in information were filled through interviews with representatives of the Ministry of Education, the Ministry of Investment, Saudi universities and UK universities with knowledge of setting up TNE partnerships in Saudi Arabia.

- **Prospects for UK TNE in Saudi Arabia:** This section seeks to analyse the state of TNE collaboration between the two countries, including analysis of the current scale and types of active TNE partnership as well as the challenges faced by UK-Saudi partnerships and opportunities for further collaboration. The state of TNE collaboration was assessed via a variety of approaches, including an analysis of HESA data, interviews with UK and Saudi university representatives and additional desk research.

The report also provides conclusions and recommendations drawn from a thematic analysis of the entire report, giving suggestions for policy-makers and institutions in both the UK and Saudi Arabia to enhance the ways in which UK Higher Education sector can engage and collaborate to deliver TNE in Saudi Arabia.

Methodology

The information included in this report is drawn from a variety of sources:

- **Desk research** of the regulatory and policy context of higher education in Saudi Arabia including academic research reports, legal and regulatory texts, university websites, ministry websites and grey literature including strategy papers and government reports. The purpose of this approach was to comprehensively understand the regulatory and policy framework governing higher education in Saudi Arabia. It also aimed to lead to a detailed description of the theoretical operating environment for overseas universities in Saudi Arabia.
- **Analysis of data and statistics** from the following sources:
 - UK Higher Education Statistics Agency
 - UK Department of Education
 - Saudi Arabia's Ministry of Education
 - Saudi Arabia's General Authority for Statistics
 - The World Bank
 - UNESCO Institute for Statistics

The purpose of this analysis was to gather quantitative insights and trends regarding TNE between the UK and Saudi Arabia, utilising data from reputable sources to inform assessments of student enrolment, programme types, institutional partnerships and other relevant metrics guiding policy and strategic decisions in the TNE landscape.

- **Semi-structured interviews** conducted in January, February and March 2024 with stakeholders from UK and Saudi institutions.
 - In the UK, interviews involved representatives of university academic partnership teams, international offices and similar functions. A total of 10 interviews were conducted with representatives of universities across the whole of the UK, including Russell Group and non-Russell Group universities. The universities involved were at various stages of their engagement with Saudi Arabia and had partnerships of different kinds with universities in the country.
 - In Saudi Arabia, interviews involved representatives of university academic partnership teams, international offices and similar functions as well as representatives of the MOE, MISA and ETEC. A total of eight interviews were conducted, including with representatives of public universities.

The aim of the interviews was to gather qualitative insights into the perspectives, challenges and opportunities surrounding TNE between the UK and Saudi Arabia, engaging stakeholders from both countries to understand their experiences, concerns, and aspirations related to TNE partnerships, regulations and collaborative initiatives. The interviews were also instrumental in understanding the practical application of legislation and processes on the ground.

TNE in Saudi Arabia

Introduction to Saudi Arabia

Saudi Arabia, officially the Kingdom of Saudi Arabia, covers a total area of approximately 830,000 square miles, making it the fifth-largest country in Asia and the largest in the Middle East.¹ The country has experienced rapid population growth in the last 40 years and was home to an estimated 32.2 million people in 2022.² According to the most recent census, 63% of Saudis are under the age of 30 compared to 36% of people under the age of 30 in the UK.^{3 4} Historically, the Saudi economy has been dominated by the hydrocarbons sector, which has typically made up around 40% of GDP.⁵

However, Saudi Arabia has undergone substantial change both economically and socially in recent years, most notably since Crown Prince Mohammed bin Salman was appointed in 2017. The Crown Prince is the driving force behind the government's Vision 2030 campaign, a wide-ranging approach with the stated aim of transforming the country and diversifying beyond the oil sector to "future proof" the economy. Vision 2030, which is built around the themes of "a vibrant society, a thriving economy and an ambitious nation" is designed to overhaul the country's image and establish Saudi Arabia as a flourishing business, sports and tourism hub.⁶

Socially, too, Saudi Arabia is experiencing a time of considerable change. In 2018, the ban on women driving in the country was lifted.⁷ The same year, women were allowed to attend mixed sporting events at public stadiums.⁸ And in 2019, rules requiring female visitors to Saudi Arabia to wear an abaya were also relaxed although modest dress is still required.⁹ Against this backdrop, women made up 22.4% of workers in Saudi Arabia in 2022, up from 15.4% in 2018, according to World Bank data.¹⁰

¹ azalghamdi01 (2019). *General Information about The Kingdom of Saudi Arabia*. [online] General Authority for Statistics. Available at: <https://www.stats.gov.sa/en/page/259>.

² Reuters (2023). Saudi population at 32.2 million, 63% of Saudis under 30 years old, census shows. *Reuters*. [online] 31 May. Available at: <https://www.reuters.com/world/middle-east/saudi-population-322-mln-median-age-29-years-old-general-authority-statistics-2023-05-31/>.

³ www.ons.gov.uk. (n.d.). Population estimates - Office for National Statistics. [online] Available at: <https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates#:~:text=What>.

⁴ Reuters (2023). Saudi population at 32.2 million, 63% of Saudis under 30 years old, census shows. *Reuters*. [online] 31 May. Available at: <https://www.reuters.com/world/middle-east/saudi-population-322-mln-median-age-29-years-old-general-authority-statistics-2023-05-31/>.

⁵ Washington, D. (2022). *SAUDI ARABIA SELECTED ISSUES International Monetary Fund*. [online] Available at: <https://www.imf.org/-/media/Files/Publications/CR/2022/English/1SAUEA2022002.ashx>.

⁶ Saudi Vision 2030 (2023). *Saudi Vision 2030*. [online] www.vision2030.gov.sa. Available at: <https://www.vision2030.gov.sa/en/>.

⁷ McKay, E. (n.d.). Saudi Arabia lifts ban on driving for women after lengthy campaign. [online] www.ibanet.org. Available at: <https://www.ibanet.org/article/c8d82237-545d-4fca-ad14-3e56add4734b>.

⁸ Agence France-Presse (2017). *Saudi Arabia to allow women into sports stadiums as reform push intensifies*. [online] the Guardian. Available at: <https://www.theguardian.com/world/2017/oct/30/saudi-arabia-to-allow-women-into-sports-stadiums-as-reform-push-intensifies>.

⁹ Anon, (2019). *Saudi Arabia relaxes dress code for women tourists - Meyer-Reumann & Partners*. [online] Available at: <https://meyer-reumann.com/insights/saudi-arabia-relaxes-dress-code-for-women-tourists/>.

¹⁰ data.worldbank.org. (n.d.). *Labor force, female (% of total labor force) - Saudi Arabia | Data*. [online] Available at: <https://data.worldbank.org/indicator/SL.TLF.TOTL.FE.ZS?locations=SA>.

In 2018, public cinemas were also reauthorised, with plans to build 300 cinemas with around 2,000 screens in the country by the year 2030.¹¹ Weekly sporting participation rates rose by 37% between 2015 and 2019, with a 149% increase in female participation.¹²

In this time of rapid change, Saudi Arabia's education systems are also being overhauled with a view to equipping the new generations of Saudis with the tools they need to be part of this far-reaching transition.

Higher Education in Saudi Arabia

Following the dissolution and absorption of the Ministry of Higher Education (MOHE) in 2015, the Ministry of Education (MOE) now oversees all educational levels in the country.¹³

In 2023, there were 29 public universities, 14 private universities and 24 private colleges in Saudi Arabia. These consist of colleges and departments offering diplomas as well as bachelor's and master's degrees and PhDs in various specialisations. The oldest university in the country is the public King Saud University, which dates back to 1957, and many institutions are less than 20 years old.^{14 15}

In 2019, an estimated 1.6 million students were enrolled in universities and almost 200,000 in technical and vocational education in Saudi Arabia. Around 95% of students were enrolled at public universities with the remaining 5% enrolled at private institutions. Most students at Saudi universities (82%) were studying to achieve a bachelor's degree, with only 3% enrolled on a graduate programme and the remaining 15% studying for an intermediate diploma.

Of those students studying for a graduate degree, 72% were studying for a master's degree, 17% for a doctorate, 8% for a higher diploma and 3% for a fellowship.¹⁶ The low number of postgraduate students compared to undergraduates may point towards unmet demand for locally-delivered postgraduate courses.

Nearly all Saudi nationals receive free tuition at universities within the country, with scholarships also available for non-Saudis at both public and private universities.¹⁷

Female students are both more likely than males to enter university and also have higher graduation rates. 60 per cent of graduates in 2019 were female. In contrast the numbers of male and female postgraduate students are almost equal while a substantial majority of

¹¹ Al Jazeera. (n.d.). *Saudi Arabia's first cinema in decades to open on April 18*. [online] Available at: <https://www.aljazeera.com/features/2018/4/4/saudi-arabias-first-cinema-in-decades-to-open-on-april-18> [Accessed 17 Mar. 2024].

¹² Saudigazette. (2021). *Women's participation in sports events up by 149% in 4 years*. [online] Available at: <https://saudigazette.com.sa/article/612879/SAUDI-ARABIA/Womens-participation-in-sports-events-up-by-149-in-4-years> [Accessed 17 Mar. 2024].

¹³ moe.gov.sa. (n.d.). | *The Emergence of the Ministry*. [online] Available at: <https://moe.gov.sa/en/aboutus/aboutministry/pages/about.aspx>.

¹⁴ Stats.gov.sa. (2024). Available at: https://www.stats.gov.sa/sites/default/files/Table4-7_1.xlsx [Accessed 17 Mar. 2024].

¹⁵ ksu.edu.sa. (n.d.). *History | King Saud University*. [online] Available at: <https://ksu.edu.sa/en/history> [Accessed 17 Mar. 2024].

¹⁶ Stats.gov.sa. (2024). Available at: https://www.stats.gov.sa/sites/default/files/Table4-7_1.xlsx [Accessed 17 Mar. 2024].

¹⁷ Taylor, C. and Albasri, W. (2014) The Impact of Saudi Arabia King Abdullah's Scholarship Program in the U.S.. *Open Journal of Social Sciences*, 2, 109-118. doi: [10.4236/jss.2014.210013](https://doi.org/10.4236/jss.2014.210013).

students on sub-degree programmes are male.¹⁸ The overall gender split at Saudi universities was almost exactly equal in 2019, with male students representing 49.9% and female students making up 50.1% of students.¹⁹

For the most part, students in Saudi Arabia are taught in single-sex classes. However, some co-educational tertiary settings do exist, including the King Abdullah University of Science and Technology (KAUST) and the Saudi Electronic University, which utilises blended learning.^{20 21} In 2018, the board of King Fahd University of Petroleum and Minerals (KFUPM) also approved the admission of local female students to graduate programmes.²²

In 2019, in the context of the economic changes discussed above, Saudi Arabia introduced a new Law of Universities (LOU), which was designed to contribute to reducing the dependence of public universities on government funding.²³ The new law provides public universities with some freedoms to diversify their sources of revenue alongside partial administrative independence from the MOE.²⁴

In the most recent developments in the sector, in February 2024, Saudi Arabia's MOE and Ministry of Foreign Affairs (MOFA) jointly announced a dedicated "Study in Saudi Arabia" visa programme, confirming the country's desire to become an importer of students. The initiative is designed to simplify visa procedures for students wishing to study in the country and will see the launch of an online visa platform for processing applications. Visas will be made available for a range of options, from short courses to more extensive academic programmes.²⁵

International mobility of students from Saudi Arabia

According to data from Saudi Arabia's Ministry of Education, there were a total of 127,507 Saudi students studying for higher education awards overseas in 2019. Meanwhile, estimates from UNESCO show that the country was the world's 15th largest sender of internationally mobile tertiary students in 2019.^{26 27}

¹⁸ British Council (2022) Market Intelligence Brief Saudi Arabia, Available at: <https://opportunities-insight.britishcouncil.org/ei-item-display/market-intelligence-brief-saudi-arabia-2022> [Accessed 18 April. 2024].

¹⁹ Stats.gov.sa. (2024). Available at: https://www.stats.gov.sa/sites/default/files/Table4-7_1.xlsx [Accessed 17 Mar. 2024].

²⁰ seu.edu.sa. (n.d.). *Saudi Electronic University*. [online] Available at: <https://seu.edu.sa/en/home/> [Accessed 17 Mar. 2024].

²¹ Alhoian, S. (2018). An Analysis of the King Abdullah University of Science and Technology in Saudi Arabia. *Journal of Education and Practice*, 9(9), pp.109–114.

²² sustainability.kfupm.edu.sa. (n.d.). *Measures at KFUPM toward Gender Equality - Sustainability*. [online] Available at: <https://sustainability.kfupm.edu.sa/gender-equality/> [Accessed 17 Mar. 2024].

²³ Royal Decree No. M/27 on the Law of Universities, 2020, Council of Universities' Affairs

²⁴ Albeshir, Saud. (2022). A comparative study between the new and old university laws in Saudi Arabia. 148-157.

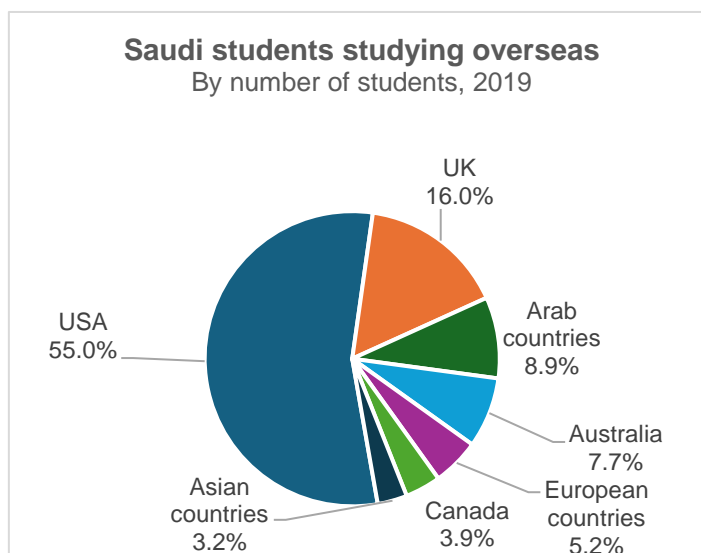
²⁵ Saudi Arabia introduces new study visa program for international students. (2024). *The Economic Times*. [online] 4 Mar. Available at: <https://economictimes.indiatimes.com/nri/study/saudi-arabia-introduces-new-educational-visa-program-for-international-students/articleshw/108195582.cms?from=mdr> [Accessed 17 Mar. 2024].

²⁶ UNESCO's estimates do not match exactly with Ministry of Education data. This report focuses mainly on MoE's figures, as these are likely to be more reliable; however, UNESCO figures are available across many countries so these are used to compare mobility from Saudi Arabia with other student sources / destinations

²⁷ UIS Database, *UNESCO Institute for Statistics*, accessed [Accessed 18 April. 2024]. <http://data.uis.unesco.org/>
<https://opportunities-insight.britishcouncil.org/>

The MoE's figure includes new, continuing and graduating students. The majority of overseas students (88%) were supported by scholarships, while the remaining 12% were registered as private, or self-funded, students. Even these self-funded students are required to register their overseas study plans with the Saudi government in order for their degrees to be recognised after they return to the country.

It should be noted that not all students described by the Saudi statistics as being without government scholarships are actually self-funded, as they may be funded by other institutions such as their employers or a university, amongst others.



Source: Ministry of Education, Saudi Arabia

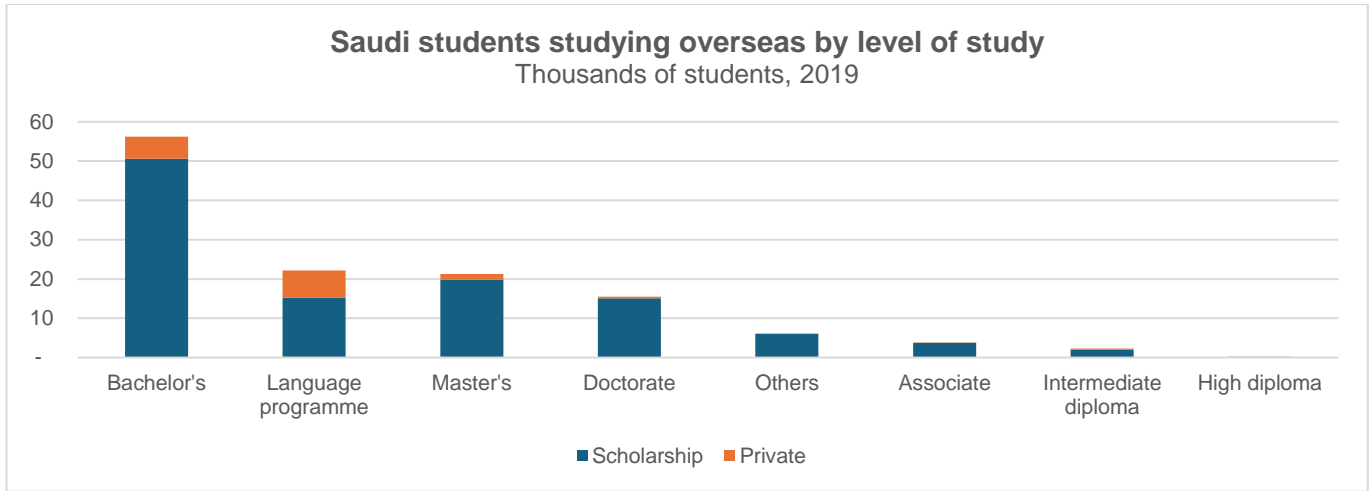
The most popular destination country for Saudi students overseas in 2019 was the United States, which accounted for 55% of the total number of HE students studying overseas, or 70,157 students. This included 62,351 scholarship-funded students (55% of all scholarship students) and 7,806 self-funded students (52% of self-funded students).

The UK came in second overall as a destination for Saudi students studying overseas, accounting for 16% of students (20,375 students). The UK was the destination for 19,474 (17%) scholarship students, making it the second largest country in this category. However, for self-funded students, the UK places third behind what are broadly described as 'Arab countries'. Indeed, Arab countries accounted for 4,425 students or 30% of demand from self-funded students in 2019 compared to just 6% (901 students) for the UK.

With regard to demand in predominantly English-speaking countries, Saudi Arabia's MOE provides data for the US, UK, Australia and Canada, which together accounted for 105,379 (83%) students studying for a higher education overseas in 2019. Of those studying in English-speaking countries, the US accounts for 70,157 (67%) students, with the UK in second place at 20,375 (19%). Australia and Canada represent 9,867 (9%) and 4,980 (5%) students respectively.

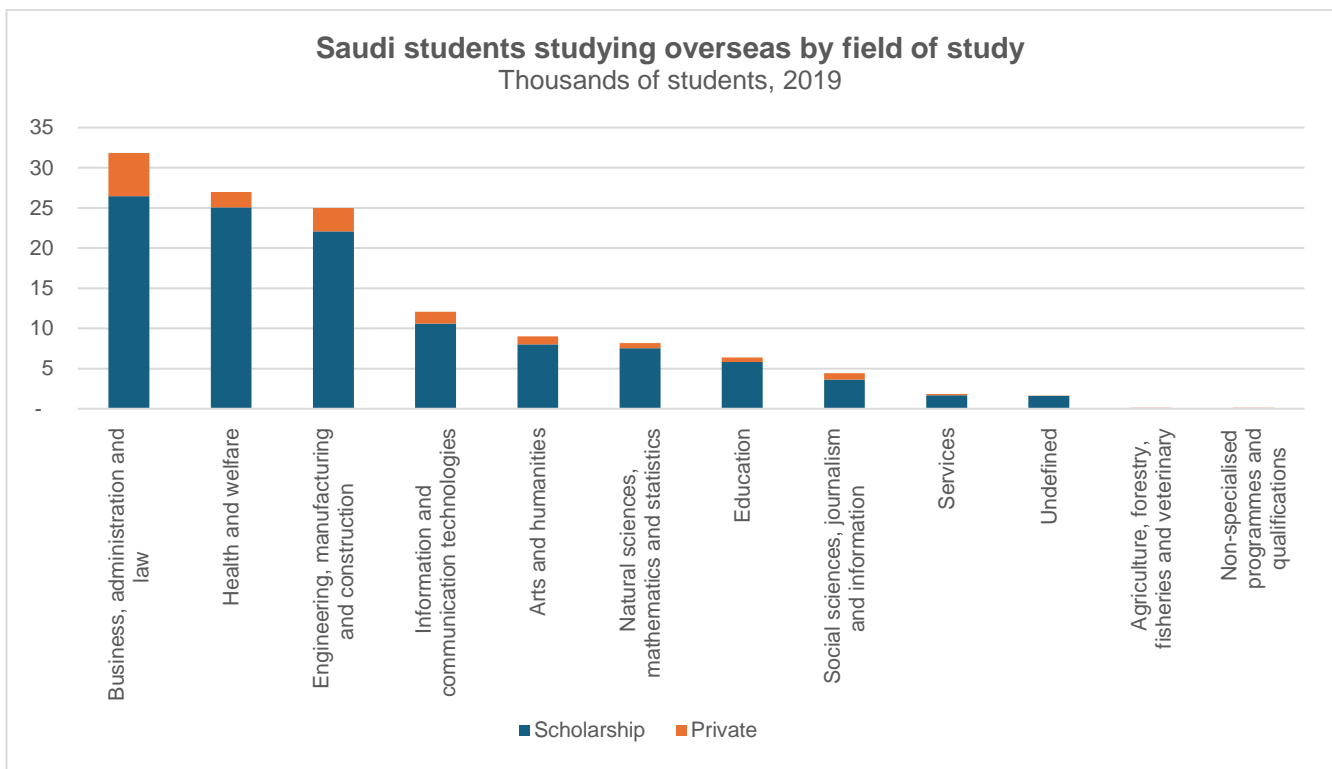
The proportion of scholarship-funded students in all four of these English-speaking countries was higher than the overall average. The proportions of Saudi students receiving government scholarships in Canada, the UK, Australia and the US were 97%, 96%, 93% and 89% respectively.

Taken together, this data suggests a number of potential conclusions. Firstly, that there is room for the UK to grow its share of the Saudi higher education market by capturing demand from those students that currently look to other English-speaking countries, primarily the US but also Australia and Canada. And secondly, the UK has a relatively stronger position among scholarship-funded students than among self-funded Saudi students, particularly compared to the US.



Source: Ministry of Education, Saudi Arabia

While the largest proportion of Saudi students studying overseas in 2019 were enrolled on courses to obtain bachelor’s degrees – accounting for around 56,000 students, or 44% of the total – the proportion of overseas students studying postgraduate courses was relatively larger than the corresponding proportion within the country. Around 21,000 students, or 17% of the total, were studying on a master’s programme, while doctoral students made up 12% of Saudi students studying for a higher education overseas (15,477 students). While scholarship-funded students made up a large majority of the total at all levels, those at higher levels of study were even more likely to be funded via scholarships, with 97% of doctoral students and 93% of master’s degree students receiving Saudi government scholarships compared to 90% of those on bachelor’s courses.



Source: Ministry of Education, Saudi Arabia

MoE data shows that across all levels of study, business, administration and law were the most popular courses for Saudi students studying overseas in 2019, representing a quarter of all <https://opportunities-insight.britishcouncil.org/>

students studying overseas or 31,843 students. An additional 26,989 students (21%) were engaged in courses of study in the health and welfare sector, while another 24,982 students (20%) were studying engineering, manufacturing and construction. Information and communication technologies (12,072 students, 9%), arts and humanities (8,992 students, 7%), natural sciences, mathematics and statistics (8,182 students, 6%), education (6,379 students, 5%) and social sciences, journalism and information (4,413 students, 3%) are also represented, with the remaining fields of study representing less than 1% of the overall total.

Saudi Arabia also hosts a significant number of students from overseas, with 73,200 international students at the country's universities in 2019, representing around 4% of the total population of university students. According to UNESCO data, the largest share of foreign tertiary students studying in Saudi Arabia comes from Yemen. In 2022, there were 14,620 students from Yemen studying in Saudi Arabia, followed by Syria (6558), Palestine (4628) and Egypt (3369).²⁸ Data suggests that students from low and lower-middle income countries are generally less likely to study abroad. However, in Saudi Arabia, they represented 81% of international students in 2019, compared to 29% in total across OECD countries.²⁹

In this context, it may be noted that Saudi Arabia has historically provided support to Yemen's education sector, including funding the studies of Yemeni students overseas. In June 2021, the two countries signed Yemen and Saudi Arabia signed the "Education for Development" agreement to pay the tuition fees and monthly allowances of Yemeni scholarship students abroad.³⁰ And in August 2023, Saudi Arabia's MOE announced that Yemeni students would be allowed to attend government schools in the country free of charge.³¹ As such, it appears that much of Saudi Arabia's inbound demand for higher education is currently driven primarily by international cooperation and development considerations.

²⁸ UNESCO Institute for Statistics. (n.d.). Global Flow of Tertiary-Level Students. [online] Available at: <http://data.uis.unesco.org/index.aspx?queryid=3807#> [Accessed 18 Apr. 2024].

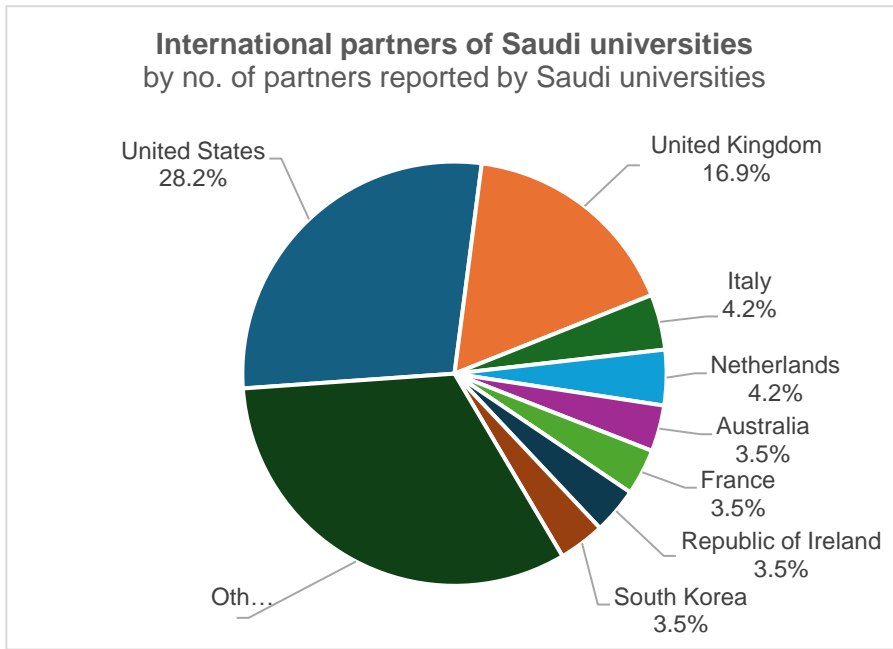
²⁹ [www.oecd-ilibrary.org](https://www.oecd-ilibrary.org/sites/3f8e39f5-en/index.html?itemId=/content/component/3f8e39f5-en#:~:text=International%20student%20mobility%20at%20the). (n.d.). Home. [online] Available at: <https://www.oecd-ilibrary.org/sites/3f8e39f5-en/index.html?itemId=/content/component/3f8e39f5-en#:~:text=International%20student%20mobility%20at%20the> [Accessed 8 Apr. 2024].

³⁰ Ministry of Foreign Affairs and Expatriates. (2021). Yemeni-Saudi agreement signed to support Yemeni students on scholarships. [online] Available at: <https://www.mofa-ye.org/Pages/14109/> [Accessed 8 Apr. 2024].

³¹ Nihal, M. (2023). *Saudi Arabia offers free education to Yemeni students in the kingdom*. [online] The National. Available at: <https://www.thenationalnews.com/gulf-news/2023/08/30/saudi-arabia-offers-free-education-to-yemeni-students-in-the-kingdom/> [Accessed 8 Apr. 2024].

Current HE collaboration in Saudi Arabia

Desk and field research did not uncover any official statistics about the state or scale of



Source: Itri Insights

university partnerships or transnational education within Saudi Arabia. We nonetheless conducted our own appraisal of collaborative international university partnerships based on information published on the websites of universities in Saudi Arabia. The level of detail on international partnerships varied significantly from one institution to another, with some providing no information besides the name of the partner, while others published details of the specific

programmes and courses as well as the length of time that the collaboration had been in place. For this reason, it was not possible to confirm whether all, or any, of the partnerships relate specifically to TNE programmes or whether they were primarily related to joint research, staff mobility, student exchanges or other forms of collaboration. Nonetheless, the data serves as an indicator of the international collaboration landscape in Saudi Arabia at the university level.

Overall, we gathered information about 142 international partnerships involving 20 Saudi universities and 136 foreign universities from 34 countries.

The information gathered was not detailed enough across the board to provide an idea of the number of programmes involved or the number of students enrolled on those programmes. However, it is possible to establish that 28% of overseas partners mentioned on Saudi institutions' websites were based in the United States, making this the largest country for partnerships with Saudi universities. UK universities were the second largest category (17%) cited as partners by Saudi universities, after which the numbers drop off significantly, suggesting a relatively fragmented picture for the rest of the partnerships landscape.

Of all Saudi universities, King Saud University reported the largest number of international partners (24), followed by Prince Sultan University (22), Princess Norah bint Abdulrahman University (17) and Prince Mohammad University (14). Half of the Saudi universities that provided information about their international collaborations had fewer than five partners, with a total of six universities reporting that they had just one international partner.

Information on the kinds of partnership was too limited to draw any firm conclusions. Indeed, in 71% of cases, no information was provided as to the type of partnership between Saudi and international universities. However, it is worth noting that 13% of partnerships were described as Memoranda of Understanding (MOU) and 8% as Service contracts.

In discussions with Saudi university representatives, one interviewee noted that their institution has multiple TNE agreements in place with universities from the UK and US. Others cited more general international collaboration with the UK, US, South Asia, Australia, Spain, Switzerland and Japan. This included student and teacher exchange programmes, but did not yet include a TNE component.

The history of TNE in Saudi Arabia

Historically, Saudi Arabia primarily engaged with international Higher Education (HE) providers via a scholarship programme that enabled its students to travel overseas to complete their university education. Founded in 2005, the King Abdullah Scholarship Programme initially began with an agreement to increase the number of students in the United States before expanding to include other countries. Funding packages covered not only full tuition, but also medical insurance, a monthly stipend for living expenses and an annual round-trip airfare for undergraduate, graduate and doctoral students.³²

As such, demand for in-country delivery of transnational education (TNE) programmes and courses such as joint and dual awards, franchised programmes, validated programmes and articulation agreements was less pronounced than in other countries across the region and the world, where access to international options was often more limited.

Nonetheless, in the last decade, some TNE provision has emerged. Notable examples include the Arab Open University (AOU), in partnership with the UK's Open University (OU), which has been delivering courses that lead to an award from the OU after it began operating in the country in 2003.³³ And in 2006, the University of Ulster signed a contract with the SAAD Nursing and Allied Health Science College of Al-Khobar to train 1,000 nurses over a ten-year period, with successful students being awarded a BSc Honours in Nursing.³⁴

In 2009, King Saud University (KSU) in Riyadh launched its External Joint Supervision Programme (EJSP), which was explicitly designed to complement the overseas study model by providing access to a split-site joint supervision model for a full-time PhD programme. The programme was aimed at students who could not spend extended periods of time overseas due to their personal circumstances. Students on the EJSP programme, which is still operating, have a primary supervisor from an international university and a co-supervisor from KSU, with up to two months of study taking place at the international university.³⁵

The EJSP is theoretically open to all highly ranked universities. However, 43 of its 48 current students (90%) and of its 42 (81%) successful graduates are or were jointly supervised by UK universities. Belgium, Denmark, the Netherlands, Spain and Switzerland each currently have one student enrolled on the EJSP, together accounting for the remaining 12%. For graduated students, four graduates (10%) were supervised by US universities, two (5%) by Japanese

³² Alqahtani, A. (2014). Evaluation of King Abdullah Scholarship Program. *Journal of Education and Practice*, 5(15), pp.33–41.

³³ www5.open.ac.uk. (n.d.). *The Open University*. [online] Available at: <https://www5.open.ac.uk/validation-partnerships/become-partner/current-ouvp-partners/arab-open-university> [Accessed 17 Mar. 2024].

³⁴ The Irish Times. (n.d.). *University of Ulster to train Saudi nurses*. [online] Available at: <https://www.irishtimes.com/news/university-of-ulster-to-train-saudi-nurses-1.769237> [Accessed 17 Mar. 2024].

³⁵ Anon, (n.d.). *What is EJSP?* [online] Available at: https://ejsp.ksu.edu.sa/sites/ejsp.ksu.edu.sa/files/users/user977/What%20is%20EJSP-%20Jan%202023_1.pdf [Accessed 22 Mar. 2024].

universities, one (2%) by a German university and one (2%) by an Italian university. To date, the EJSP has involved 30 universities from 10 partner countries.^{36 37}

Other examples of global TNE include a one-week induction programme run in 2014 by Dublin City University (DCU) delivered to students, academics and management at Princess Norah bint Abdulrahman University (PNU) in Riyadh.³⁸ This later developed into the delivery of International Finance and Marketing Innovation and Technology programmes by DCU staff at PNU.³⁹

In 2014, Saudi Arabia experienced significant change in the context of the substantial and sustained oil price crash that began in the latter part of the year. This fed through to broader changes in approaches to HE and TNE. Given the reliance of Saudi Arabia's economy on its hydrocarbons industry, the oil price crash impacted the country's approach to higher education in two important aspects.

Firstly, it reduced the resources available to the country to fund overseas scholarships, resulting in the programme being scaled back in 2016.⁴⁰ And secondly, it focused the energy of the country's decision-makers on the importance of diversifying the economy away from hydrocarbons, with all that this entails in terms boosting local innovation, entrepreneurship and business attractiveness and ensuring that future generations of its citizens have the skills to meet this challenge.⁴¹

The sum total of these changes led to a gradual but perceptible shift in Saudi Arabia's approach to HE and TNE. While Vision 2030 explicitly states that study abroad programmes will be maintained, authorities have also moved to encourage the emergence of more local TNE partnerships, although this did not immediately lead to a widespread proliferation of International Branch Campuses (IBCs) or other forms of TNE starting in 2016. Rather, the intervening years have seen the gradual reshaping of the educational landscape to render it more receptive to TNE.

In 2019, the new LOU formalised the requirement for Saudi Arabia's universities to adhere to local accreditation and quality mechanisms for the first time.⁴² This provision is particularly interesting in relation to TNE, since the absence of a clear quality framework was one element that rendered the task of setting up international partnerships more difficult.

By 2021, government representatives made the first mention of a specific law to regulate the creation and management of branch campuses by foreign universities and was designed to

³⁶ Anon, (n.d.). *EJSP Graduated Student List*. [online] Available at: <https://ejsp.ksu.edu.sa/en/node/596> [Accessed Mar. 24, 2024].

³⁷ ejsp.ksu.edu.sa. (n.d.). *StudentsN | External Joint Supervision Program (EJSP)*. [online] Available at: <https://ejsp.ksu.edu.sa/en/node/2866> [Accessed 24 Mar. 2024].

³⁸ www.dcu.ie. (2015). *DCU BEST Programme successfully delivered in PNU | Dublin City University*. [online] Available at: <https://www.dcu.ie/executiveeducation/news/2015/02/dcu-best-programme-successfully-delivered-in-pnu> [Accessed 17 Mar. 2024].

³⁹ Dublin City University. (2015). *DCU@PNU | Middle East*. [online] Available at: <https://www.dcu.ie/middleeast/dcupnu>.

⁴⁰ Faro (2016). Saudi Arabia to repatriate its overseas students. [online] MENA-Forum. Available at: <https://mena-forum.com/16689-2/> [Accessed 17 Mar. 2024].

⁴¹ Saudi Vision 2030 (2023). *Saudi Vision 2030*. [online] www.vision2030.gov.sa. Available at: <https://www.vision2030.gov.sa/en/>.

⁴² Royal Decree No. M/27 on the Law of Universities, 2020, Council of Universities' Affairs <https://opportunities-insight.britishcouncil.org/>

clarify the legal framework and requirements for non-Saudi universities to set up branch campuses in the country.⁴³ The draft law was put to public comment from 8th August to 5th September 2022 and was published alongside its Executive Regulations in October 2023.⁴⁴ ⁴⁵ Authorities in Saudi Arabia hope that the new law will encourage the creation of IBCs and contribute to the overall aim of improving HE offerings in the country.

The framework for other kinds of TNE collaboration remains less well defined, although the public desire to improve educational standards in partnership with international universities has been clearly expressed. Indeed, some universities have continued to move forward with plans to explore other forms of TNE.

For example, in 2021, the University of Ljubljana (Slovenia) and the King Abdullah University of Science and Technology (KAUST) offered a double degree in Computer Graphics and/or Visualization for doctoral study for two students. The four-year programme takes place between both institutions with at least two and a half years at KAUST.⁴⁶

And in May 2022, the University of Arizona (United States) and Prince Mohammad bin Fahd University (PMU) signed an agreement to establish two dual master's programmes, namely a dual master's of Engineering - Innovation, Sustainability, and Entrepreneurship starting in the spring of 2023 and a master's of Science in Engineering Management beginning in the autumn of the same year.⁴⁷

Following the introduction of the new Executive Regulation for establishing branches of foreign universities, in March 2024 it was also announced that University of Wollongong (UOW, Australia) and the Arizona State University (ASU, United States) have taken concrete action towards establishing branch campuses in Saudi Arabia. The UOW has already been issued with an investment licence, the required first step for foreign companies to operate legally in the country. The ASU, meanwhile, has signed a Memorandum of Understanding (MOU) with the MOE and the Ministry of Investment (MISA), alongside Cintana Education Company, to establish a new university and an affiliated school. In May 2024, immediately prior to the publication of this report, the University of Strathclyde also announced plans to become the first UK higher education institution to establish a physical presence within Saudi Arabia, in partnership with Princess Nourah Bint Abdulrahman University.

⁴³ Saudigazette. (2021). *Saudi Arabia soon to have branches of prestigious foreign universities*. [online] Available at: <https://saudigazette.com.sa/article/603619> [Accessed 17 Mar. 2024].

⁴⁴ University World News. (n.d.). *Draft law for foreign campuses 'constrains autonomy'*. [online] Available at: <https://www.universityworldnews.com/post.php?story=2022090908005012>.

⁴⁵ Saudigazette. (2023). *Saudi Arabia approves Executive Regulation to open foreign university branches*. [online] Available at: <https://www.saudigazette.com.sa/article/636939> [Accessed 17 Mar. 2024].

⁴⁶ fri.uni-lj.si. (n.d.). *Double degree programme with KAUST*. [online] Available at: <https://fri.uni-lj.si/en/news/article/double-degree-programme-kaust> Accessed 17 Mar. 2024].

⁴⁷ international.arizona.edu. (n.d.). *University of Arizona and Prince Mohammad bin Fahd University in Saudi Arabia Sign Academic Educational Exchange Services/Microcampus Agreement | Arizona International*. [online] Available at: <https://international.arizona.edu/news/university-arizona-and-prince-mohammad-bin-fahd-university-saudi-arabia-sign-academic> [Accessed 17 Mar. 2024].

Key drivers of demand for TNE in Saudi Arabia

Authorities in Saudi Arabia have been clear about their interest in building capacity in the country's higher education space.

Significant government investment has been allocated to the sector, with an estimated 202 billion SAR (approximately 42bn GBP) assigned to education in 2023.⁴⁸

Spending on education routinely represents around 16-17% of the country's budget and is often the third largest area of expenditure after defence and healthcare.

The value of TNE as a means of contributing to the country's overall education goals is also clearly recognised. Perhaps the most notable example of this recognition was the publication, in October 2023, of a new framework designed to encourage foreign branch campuses to set up in Saudi Arabia. The creation of the new Executive Regulations for the creation of foreign branch campuses, as its preamble makes clear, is explicitly designed to support the development of a greater range of high-quality academic options.


The potential for TNE to assist in boosting educational achievement was also underlined in our conversations with Saudi decision makers and institutional representatives in the course of this research.

Economic development

Saudi Arabia is actively engaged in the process of working to become a "diversified, innovative and world-leading nation, for the benefit of future generations" as set out in Vision 2030.


As part of this vision, the Saudi government is engaged in initiatives that seek to boost economic activity at home and to attract greater investment from overseas. Authorities are moving forward with plans to create entirely new cities, including the high-profile The Line project, under construction in Neom in the Tabuk Province. Separately, the "Project HQ" initiative is seeking to transform Riyadh into a key business hub for the Middle East.

Vision 2030 overtly recognises that achieving the country's "desired rate of economic growth will require an environment that attracts the necessary skills and capabilities both from within the Kingdom and beyond our national borders". Meanwhile, the new regulations for foreign



"THE KINGDOM'S GOAL IS AN EDUCATION SYSTEM ABLE TO CULTIVATE PROMISING YOUNG TALENT, WHILE ALSO MEETING EVOLVING LABOUR MARKET NEEDS"

Saudi Vision 2030



"EDUCATION IS A CORNERSTONE OF VISION 2030 AND THE BASIS UPON WHICH SAUDI ARABIA'S FUTURE WILL BE BUILT"

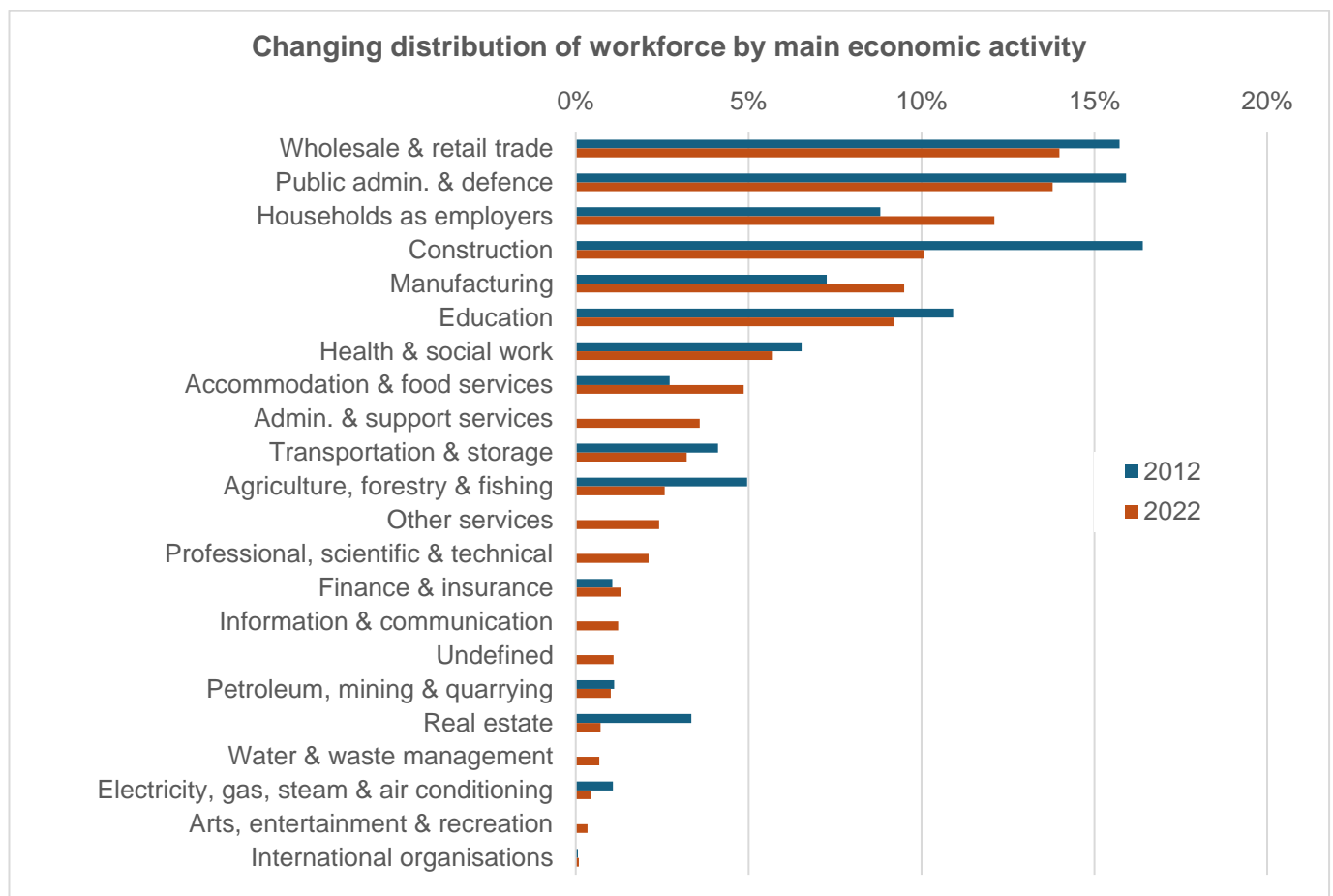
Saudi Vision 2030

⁴⁸ Budget Statement Contents. (2023). Available at: <https://www.mof.gov.sa/en/budget/2023/Documents/Bud-En%202023MoF.pdf>.

branches campuses within Saudi Arabia note that institutions are required by law to “provide educational programmes that meet the requirements of the country’s development and communities”.⁴⁹ International universities that apply to open a branch campus must provide evidence during their application that their courses do in fact meet the needs of the market, underlining the importance of this requirement. This will be covered in more detail in the section on International Branch Campuses.

Crucially, while Saudi Arabia is working to increase its economic activity overall, it is also actively seeking to diversify its economy away from the hydrocarbons that have long constituted a significant portion of the country’s revenues. In this context, there is recognition that Saudi Arabia will need to find ways of “meeting evolving labour market needs”.

The country’s ambitions notably include increasing its knowledge and capacities in areas such as sustainability, healthcare, business, technology, research and development, banking and finance and others. Indeed, economic developments have already caused substantial change in the structure of the employment market.



Source: Itri Insights, General Authority for Statistics

According to data from Saudi Arabia’s General Authority for Statistics, a greater percentage of people in Saudi Arabia (including Saudis and international workers) were employed in

⁴⁹ Saudi Vision 2030 (2023). *Saudi Vision 2030*. [online] www.vision2030.gov.sa. Available at: <https://www.vision2030.gov.sa/en/>.
<https://opportunities-insight.britishcouncil.org/>

professional, scientific and technical roles, information and communication services, finance, waste and water management and the arts in 2022.

By contrast, there was a drop in the percentage of individuals employed in the construction sector in the ten years to 2022, as well as the agriculture, forestry and fishing sector, real estate and the electricity, gas, steam and air conditioning professions.

As a general trend, it does appear that Saudi Arabia is already engaged in the process of diversifying its economy, with a number of new employment categories coming to the fore over the last 10 years. However, the percentage of people employed in petroleum, mining and quarrying in particular remained largely unchanged.



“IN THE YEAR 2030, WE AIM TO HAVE
AT LEAST FIVE SAUDI UNIVERSITIES
AMONG THE TOP 200 UNIVERSITIES
IN INTERNATIONAL RANKINGS”

Saudi Vision 2030

When comparing labour market distribution in Saudi Arabia for Saudis versus foreign workers, it may be noted that the five sectors with the highest percentage of Saudi workers in 2022 were the public administration and defence sectors, education, wholesale and retail trade, health and social work and manufacturing. By contrast, the five sectors with the highest percentage of foreign workers were households, wholesale and retail trade, construction, manufacturing and accommodation and food services, which account for over 70% of foreign workers in the country when taken together.

This data could suggest that many of the workers Saudi Arabia imports do not meet the description of highly qualified university graduates to fill its skills gaps, as the primary roles filled by foreign workers are not necessarily associated with high demand for these profiles. However, foreign employees also outnumber Saudis in the broad category of “professional, scientific and technical roles” as well as in international organisations, both of which require significant numbers of highly qualified graduates.

Capacity building, institutional development and raising quality standards

Increasing the supply and diversity of high-quality education is a theme that runs throughout Vision 2030, the new Executive Regulations governing the creation of foreign branch campuses and our discussions with representatives of Saudi institutions.

Indeed, Saudi Arabia aims not only to increase the results and rankings of its universities but also to ensure that its students can “achieve results above international averages in global education indicators”.⁵⁰

The Saudi university representatives with whom we spoke also emphasised the importance of capacity building, institutional development and staff development.

According to the new regulations governing the creation of foreign university branches in Saudi Arabia – described in more detail in a subsequent section – the framework has been designed to “contribute to the development of university education” and also to “diversify university

⁵⁰ Saudi Vision 2030 (2023). *Saudi Vision 2030*. [online] www.vision2030.gov.sa. Available at: <https://www.vision2030.gov.sa/en/>.
<https://opportunities-insight.britishcouncil.org/>

education options”.⁵¹ In other words, the country is looking to increase both the quality and quantity of higher education providers in the country, with TNE as one mechanism to achieve this.

Beyond branch campuses, TNE has the capacity to boost capacity, develop institutions and raise standards by creating international networks of professionals and providing forums for sharing experiences.

Enhancing research capacity

According to Saudi Arabia’s Research, Development and Innovation Authority (RDIA), Saudi Arabia has placed a significant emphasis on research, development and innovation (RDI) in alignment with Vision 2030.

To focus these efforts, the Supreme Committee for Research, Development and Innovation (RDI) was created in 2021 and is responsible for devising a comprehensive roadmap for RDI in the country. In June 2022, the Supreme Committee announced Saudi Arabia’s research aspirations and priorities for the coming two decades, which encompass “health and wellness”, “sustainable environment and supply of essential needs”, “energy and industrial leadership” and “economies of the future”.⁵²

Authorities recognise the importance of international collaboration in the production of research. In its 2023 report, the RDIA notes the country’s progress on international research collaboration, which increased from 73% in 2018 to 78% in 2022. This figure includes all research organisations, including the private commercial sector and the healthcare sector. However, the RDIA particularly underlines the fact that academic institutions played “a major role in fostering this international collaboration”.⁵³

Two of the Saudi university representatives who were interviewed as part of this research also noted that Saudi Vision 2030 is the guiding directive in terms of research collaboration topics, with one noting that “it’s all about Vision 2030 right now”. Another noted that the themes of Saudi Vision 2030 are nonetheless quite broad, which enables many research topics to be incorporated into this scope.



“OUR AMBITION FOR SAUDI ARABIA IS
TO BECOME A GLOBAL LEADER IN
RESEARCH, DEVELOPMENT AND
INNOVATION”

HRH Prince Mohammed bin Salman bin Abdulaziz Al
Saud

While most international research collaboration is not directly linked to TNE partnerships, the new Executive Regulations governing the establishment of foreign university branch campuses in Saudi Arabia also stress the importance of the role that branch campuses can play in the

⁵¹ Council of Universities Affairs (2023). *Executive rules for the organizational regulations for foreign university branches*.

⁵² Saudi Arabia’s Leap in Research and Development Excellence. (2023). Research, Development and Innovation Authority (RDIA).

⁵³ Saudi Arabia’s Leap in Research and Development Excellence. (2023). Research, Development and Innovation Authority (RDIA).

“development of [...] scientific research systems in Saudi Arabia”.⁵⁴

In conclusion, the trajectory of higher education development in Saudi Arabia is firmly aligned with the country's Vision 2030, which aims for diversification, innovation, and international competitiveness. The substantial investments made in the education sector underscore the government's commitment to fostering a knowledge-based economy. Through initiatives such as the creation of the framework to attract foreign branch campuses, Saudi Arabia seeks to not only expand its higher education offerings but also enhance quality and relevance to meet evolving societal and economic needs. Meanwhile, its emphasis on capacity building, institutional development, and research collaboration reflects a holistic approach towards achieving excellence in education and innovation. As Saudi Arabia continues its journey towards economic diversification and knowledge-driven growth, fostering international partnerships and leveraging TNE is likely to play a pivotal role.

⁵⁴ Council of Universities Affairs (2023). *Executive rules for the organizational regulations for foreign university branches*.

TNE legislation and regulations

The legislation and regulations relating to TNE in Saudi Arabia have undergone significant change in recent years. In particular, TNE was impacted by the general restructuring of university systems and structures that took place against the backdrop of the new Law of Universities (LOU), which was introduced in 2019 and was rolled out in phases.⁵⁵

More recently, a new Executive Regulation governing the creation and management of foreign branch campuses became effective in October 2023.⁵⁶ For the first time, this law provided a clear framework for foreign universities to set up a campus in Saudi Arabia.

Saudi Arabia has also made changes to its accreditation and quality mechanisms and frameworks in recent years and has increasingly integrated these into the regulatory requirements for the education sector as a whole and for those seeking to engage in TNE partnerships.⁵⁷ The standards for institutional accreditation (2022) standard for Teaching and learning includes criteria on ensuring quality of educational partnerships, and the adherence of such partnerships to the National Center for Academic Accreditation and Evaluation (NCAAA) standards, as well as having mechanisms in place to review such partnerships annually.

Given the extent of the changes and their relatively recent introduction, many of the regulations relating to TNE partnerships have not been thoroughly tested in the market as yet. Greater clarity on the exact procedures and mechanisms for implementing TNE partnerships may be expected in the years to come as the framework is implemented on the ground.

Below, we discuss some of the main legal provisions relating to TNE and the structures involved in enforcing them.

University Councils

1. Since the introduction of 2019's LOU, all universities in Saudi Arabia must now have a body named the University Council, which manages the university's academic, administrative and financial affairs and implements its general policy. Each University Council is chaired by the university president, with other members including vice-presidents, deans of university colleges, deanships and institutes, and other members appointed by the Board of Trustees. University Councils must convene at least once every month during the academic year.⁵⁸

In the context of TNE, University Councils notably approve academic programmes and plans for the academic degrees granted by the university. More specifically, they are tasked with formally proposing academic and technical cooperation agreements and memoranda of understanding between the university and foreign institutions. The implication of this is that any TNE agreements that are negotiated and agreed with other points of contact within the university are likely to require the ultimate approval of the University Council. Involving members of the Council during the negotiation stages to understand the basis on which agreements will be assessed may therefore increase the chances of the agreement being approved.

⁵⁵ Royal Decree No. M/27 on the Law of Universities, 2020, Council of Universities' Affairs

⁵⁶ Council of Universities Affairs (2023). *Executive rules for the organizational regulations for foreign university branches*.

⁵⁷ Aburizaizah, S.J. (2022). The role of quality assurance in Saudi higher education institutions. *International Journal of Educational Research Open*, 3, p.100127. doi:<https://doi.org/10.1016/j.ijedro.2022.100127>.

⁵⁸ Royal Decree No. M/27 on the Law of Universities, 2020, Council of Universities' Affairs <https://opportunities-insight.britishcouncil.org/>

University Councils must also approve the use of languages other than Arabic within the university. According to the LOU, Arabic is the default language of instruction at universities in Saudi Arabia. However, instruction in other languages may be approved if it can be reasonably justified.

University Councils must convene to discuss the issues for which they are responsible at least once every month during the academic year. Decisions are made by the majority vote of attending members where the chairman's vote resolves any ties.⁵⁹

Council of University Affairs

The Council of University Affairs (CUA) is a body entrusted with regulating university affairs and setting their policies and regulations. It sits under the responsibility of the MOE and is chaired by the Minister of Education, Other members include Vice Ministers from other relevant government departments, the President of the Education and Training Evaluation Commission, and a number of university presidents and external experts.

In the context of TNE partnerships, the CUA has a number of specific responsibilities. Notably, it was tasked with approving the regulations of private universities and colleges as well as branches of foreign universities. It is also tasked with monitoring the implementation of these regulations.

Additionally, the CUA is also required to make its recommendations regarding the approval of the creation, cancellation or merger of universities, their branches, private colleges and branches of foreign universities, with recommendations submitted to the Council of Ministers for final approval.

Beyond branch campuses, the CUA must also recommend the approval of academic and technical cooperation agreements and MOUs between Saudi universities and foreign institutions.

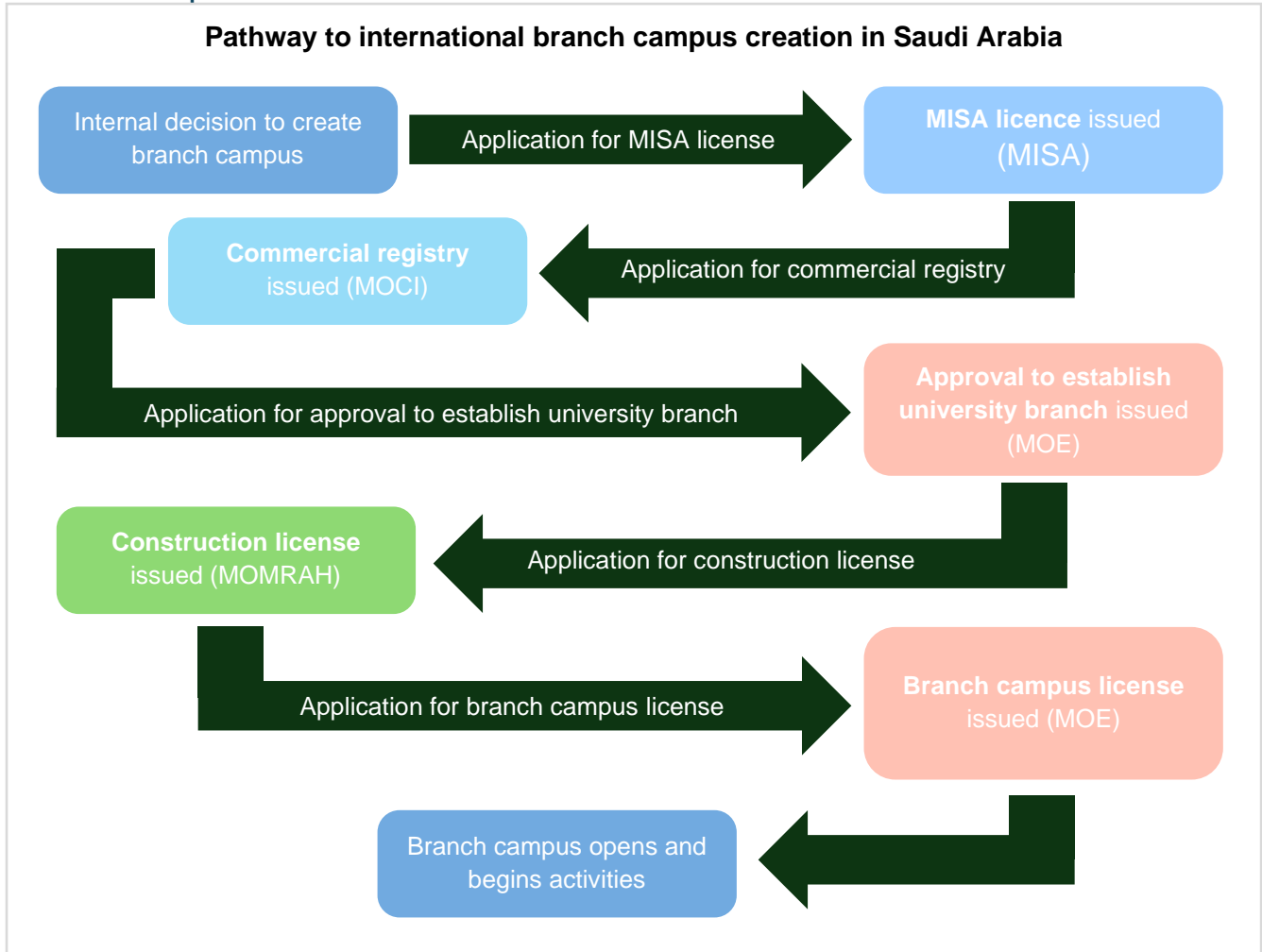
More generally speaking, the CUA holds responsibility for determining the programmes and courses for which a university may charge fees and for setting the general rules governing these fees.

According to the LOU, the CUA must convene to discuss these issues at least once every four months. Decisions are made by the majority vote of attending members where the chairman's vote resolves any ties.⁶⁰

⁵⁹ Royal Decree No. M/27 on the Law of Universities, 2020, Council of Universities' Affairs

⁶⁰ Royal Decree No. M/27 on the Law of Universities, 2020, Council of Universities' Affairs
<https://opportunities-insight.britishcouncil.org/>

Branch campuses



Source: Itri Insights, MISA, MOE, CUA

The laws that regulate and monitor the creation of foreign university branches in Saudi Arabia are recent, having been published only in October 2023.⁶¹ While the regulations became operational immediately upon publication, their practical application on the ground is in its early stages. At the time of publication, only the University of Wollongong (UOW, Australia) had officially begun the legal process of creating a branch campus and has been awarded a MISA license.⁶²

The new law governing the creation of international branch campuses in Saudi Arabia defines a university branch as “an entity emanating from a foreign university established within the Kingdom and owned by the foreign university via a legal entity established within the Kingdom”. Foreign universities are defined as any “academic institution (university, college, institute, or similar) established outside of the Kingdom”.

The implication of this law is that a non-Saudi branch campus may not be owned directly by an entity operating overseas. Rather, a branch campus in Saudi Arabia must be owned by a

⁶¹ Council of Universities Affairs (2023). *Executive rules for the organizational regulations for foreign university branches*.

⁶² University World News. (n.d.). *Plans to open two foreign branch campuses gain traction*. [online] Available at: <https://www.universityworldnews.com/post.php?story=20240308205434225> [Accessed 17 Mar. 2024].
<https://opportunities-insight.britishcouncil.org/>

commercial entity that exists within the country, which may however be 100%-owned subsidiary of a foreign entity or owned in partnership with a Saudi partner.

The practical outcome of this stipulation is that any international university seeking to set up a branch campus in Saudi Arabia is required by law to create a legal commercial entity in Saudi Arabia and will therefore be required to engage with a number of licensing procedures under the aegis of different government departments during the course of the creation and running of its campus. Broadly speaking, there are three strands to this process: a commercial strand that leads to the creation of a commercial entity that is registered with tax and labour authorities, an academic strand that leads to the creation of the university's educational structures and frameworks, programmes and courses etc., and a facilities strand that leads to the construction of a physical branch campus. Some of the strands run in parallel while others are consecutive.⁶³

All investors setting up a physical commercial presence within Saudi Arabia are required to obtain the approval of the Ministry of Investment (MISA) as their first port of call.

Subsequently, the commercial entity under creation must obtain a commercial registry certificate from the Ministry of Commerce (MOCI).

In addition, the creation and operation of foreign university branch campuses is now subject to its own dedicated set of regulations. This section of the branch campus creation process is overseen by the MOE.

Finally, the construction of the physical branch campus requires the involvement and approval of the Ministry of Municipal, Rural Affairs and Housing (MOMRAH).⁶⁴

Approvals from the Ministry of Investment (MISA)

The operation of a branch campus in Saudi Arabia falls under the ISIC activity code "853011 - Colleges and University Institutes" and, as such, is subject to the obtention of a service license.

Applications for a service license can be made via MISA's e-services portal and require investors to provide:

- A copy of the commercial registration of the shareholding partner certified by the Saudi Embassy and a copy of the national identity card, if one of the partners is an individual that holds the nationality of a GCC country.
- Financial statements of the applicant foreign company for the last financial year that have been certified by the Saudi Embassy.

Premium Saudi residence holders are exempted from providing the aforementioned documents.

The cost of the license fee is 2,000 SAR (420 GBP) for a maximum five-year period. In addition, investors must pay an annual subscription fee to use the services of MISA's investor relations centres, which is set at 10,000 SAR (2,095 GBP) for the first year and 60,000 SAR (12,570 GBP) in subsequent years. Fees are to be paid within 60 days of the bill being issued and licenses are expected to be issued within one to two working days.

⁶³ Council of Universities Affairs (2023). *Executive rules for the organizational regulations for foreign university branches*.

⁶⁴ Ministry of Investment . (2024). *Education Sector – Ministry Of Education Investor Journey List*. [online] Available at: <https://misa.gov.sa/en/investor-journey-list/moe/> [Accessed 17 Mar. 2024]

Once the investor has received its service license, it can proceed to book a name for the commercial entity under creation via MISA's investor relations centre.⁶⁵

Approvals from the Ministry of Commerce (MOCI)

Having received a services license and booked a commercial name, the investor can proceed to create the commercial entity that will hold the responsibility for building and managing its branch campus. The documentation required at this stage of the process is as follows:

- The original notarised copy of the company's Articles of Association.
- A shareholders' resolution to appoint the general manager – if through a separate contract – authenticated by the MOCI .
- Proof of identity for foreign shareholders and directors, a copy of the ID cards of any shareholders that hold Saudi nationality and a document issued by the ABSHER System to provide proof of profession or a copy of the commercial registration, shareholders' resolution and articles of association for any Saudi companies involved.
- The original document proving the commercial name booking alongside a copy.
- Proof of the authority to represent the company for the applicant and proof of the delegated signatory's identity.

Applications for the creation of a commercial entity can be made via the e-services portal of the MOCI and are expected to be processed within two working days.⁶⁶

Approvals from the Ministry of Education (MOE)

The CUA, which sits under the responsibility of the MOE, and specifically the CUA's General Secretariat, is a key stakeholder and point of contact for non-Saudi universities seeking to establish branch campuses in the country. Indeed, the CUA is tasked with supervising the governance and performance of the foreign university branch academically, financially and administratively.

As yet, no universities have completed the process of setting up a branch campus under the recently established regulatory framework. As such, it is not yet clear whether all universities who complete the procedure according to the published requirements will be approved, or whether the MOE via the CUA will play a discretionary role in the approval of any new cooperation.

According to the legal texts, in the creation stages of the branch university, there are two major milestones that directly involve the MOE via the CUA:

1. The university submits an application to establish a university branch
2. The university submits an application for a foreign university branch license

The approval to establish a university branch (1) enables the foreign university to build its campus and undertake other preparations pending the receipt of the license (2), which can only

⁶⁵ Services Manual 10th Edition. (2023). Ministry of Investment.

⁶⁶ Services Manual 10th Edition. (2023). Ministry of Investment.

be issued once all of the requirements to operate the branch, including its buildings and facilities, are in place.⁶⁷

Standardised forms and lists of required documentation have been produced and made available by the CUA for both of these procedures.

Requests to establish a university branch must be submitted by the foreign university or its representative to the General Secretariat of the CUA, alongside the following:

- Information about the foreign university, including its name, location, date of establishment, any specialisations it offers, areas of excellence, any other branches held by the university and the styles of education provided (traditional - electronic - distance - blended).
- A study that clarifies and proves the feasibility of creating the branch, accredited by a licensed consulting office in Saudi Arabia, as well as evidence of the compatibility of the programme and its outcomes with the requirements of development and the labour market.
- The bylaws of the university branch.
- A statement of the colleges, departments, institutes, research units and scientific specialisations that will comprise the university branch.
- The proposed start date for studies at the university branch.
- A request to submit a construction request to the General Secretariat.
- The commercial registration and incorporation documents for the owner, a non-profit organisation license or a MISA approval for foreign investors.
- Documents proving that the owner has the financial solvency and capabilities to establish and operate a higher education institution.
- Details of the amount of capital expected to be invested in the university.

Once the university has received its approval to establish a foreign branch, it must submit an application to obtain a license from the General Secretariat of the CUA. University branch campuses are not allowed to begin their operations without a license from the General Secretariat.

Requests to obtain a license must be accompanied by a certificate from an engineering authority accepted by the General Secretariat stating that the requirements are met and conform to the legal standards in Saudi Arabia with regard to the buildings, facilities and equipment of the foreign university branch.

Foreign university branch licenses are issued for a period of five years and may be renewed at least 90 days before the license expires. License renewals take effect on the first day following the expiry of the previous license, regardless of when the renewal request was submitted.⁶⁸

⁶⁷ Council of Universities Affairs (2023). *Executive rules for the organizational regulations for foreign university branches*.

⁶⁸ Council of Universities Affairs (2023). *Executive rules for the organizational regulations for foreign university branches*.

Approvals from the Ministry of Municipal, Rural Affairs and Housing (MOMRAH)

The Ministry of Municipal, Rural Affairs and Housing is responsible for urban planning in Saudi Arabia's cities. It is also tasked with improving cities, developing municipal and rural areas and managing the services required to maintain environmental cleanliness.

Investors can apply for a construction license via the MOMRAH's e-portal or the city services Balady application.⁶⁹

Operational requirements for branch campuses

Besides the requirements relating to the creation of foreign university branch campuses, the regulations also stipulate the following key operational requirements:

Educational requirements

The academic certificates granted by the university branch to its graduates must be issued and certified by the foreign university in the name of its branch.

The university branch commits to ensuring the quality of all the academic programmes it offers and complying with the requirements of the [Education and Training Evaluation Commission \(ETEC\)](#) in this regard.

Education at the university branch must be conducted in the first language of the foreign university, unless the recommendation for approval to establish the university branch includes the provision of education in another language.⁷⁰

Organisational requirements

Any changes to study programmes or colleges within the branch university must be submitted to the CUA for approval.

This includes requests to create, merge, remove or modify the name of a college within the branch and requests to suspend or cancel study programmes. Requests to suspend or cancel study programmes must also include a comprehensive plan to address the situation of any enrolled students and ensure that they are not harmed academically.

Branches of foreign university that wish to organise scientific events must also seek the approval of the General Secretariat of the CUA.⁷¹

Financial requirements

University branches must provide financial guarantees that they are able to create and operate a university campus. Once operational, they must also have an annual budget and regular financial records in accordance with the accounting standards of Saudi Arabia. The annual financial statements of the university branch must be audited by an external auditor licensed to work in Saudi Arabia.

In addition, upon creation of the branch, the owner must provide:

⁶⁹ إتمام. (n.d.). Construction License. [online] Available at: <https://etmam.momrah.gov.sa/en/services/construction-license/>.

⁷⁰ Council of Universities Affairs (2023). *Executive rules for the organizational regulations for foreign university branches*.

⁷¹ Council of Universities Affairs (2023). *Executive rules for the organizational regulations for foreign university branches*.

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- A bank guarantee of no less than 5,000 SAR for each student according to the application submitted for a period of no less than three months from the date on which the application was submitted.
 - Or a financial solvency certificate from one of the banks or financial institutions licensed to operate in Saudi Arabia.
 - Or a bank statement containing no less than 5,000 SAR for each student according to the application submitted for a period of no less than three months from the date on which the application was submitted.
 - Or financial statements for the last two years for the owner company if it is an education investor, provided that they are audited and stamped (all pages) by a chartered accountant.

Secondly, when licensed, the owner must provide:

- A bank guarantee of no less than 5,000 SAR for each student, according to the capacity stipulated in the engineering certificate.
- Or a financial solvency certificate from one of the banks or financial institutions licensed to operate in Saudi Arabia.
- Financial statements for the last two years for the owner company if it is an education investor, provided that they are audited and stamped (all pages) by a chartered accountant.
- Buildings and property insurance.⁷²

Building requirements

University branches must be completed within a period of no more than three years from the date that the decision to approve the creation of the foreign branch is announced. Universities may apply for this period to be extended by a year. If the campus is not completed within the required timeframe and no extension request is filed, the General Secretariat of the CUA may recommend that the approval to create the branch is revoked.

Universities must also inform the CUA within 30 days if any changes are made to the branch campus property that invalidate its engineering certificate. A reissued engineering certificate should be provided within five days.⁷³

Administrative requirements

The head of the university branch in Saudi Arabia is accountable to the Minister of Education.

All employees of the university branch are subject to the labour laws in effect in Saudi Arabia.

University branches may not suspend their activities, amend their statutes or transfer their ownership except with the prior approval of the CUA.⁷⁴

Reporting requirements

⁷² Council of Universities Affairs (2023). *Executive rules for the organizational regulations for foreign university branches*.

⁷³ Council of Universities Affairs (2023). *Executive rules for the organizational regulations for foreign university branches*.

⁷⁴ Council of Universities Affairs (2023). *Executive rules for the organizational regulations for foreign university branches*.

Upon request, foreign university branches must provide the General Secretariat of the CUA with the following data, documents and information:

- Data, documents and information about students, including admissions data, academic records, any certificates and documents issued, conduct, papers and grades achieved in exams.
- The records and files of its employees including contracts and work certificates.
- The administrative records and files of the foreign university branch.
- Other data and documents specified by the General Secretariat.⁷⁵

Other forms of TNE

The legislative landscape for forms of TNE other than branch campuses remains less well defined than that of branch campuses. However, our discussions with UK and Saudi universities provided some insight into the process of implementing TNE programmes, particularly joint and dual degree programmes.

Interviewees were not able to provide any specific guidance on validated or franchised partnerships. However, the British Council is aware of at least one previous example of this partnership model (specifically the collaboration between the Arab Open University and the Open University in the UK), which suggests that partnerships of this type are possible at least in principle.

One representative from a Saudi university noted that the UK is at an advantage for creating TNE partnerships in Saudi Arabia because the UK and Saudi Arabia already have a general MOU and an educational MOU in place. As such, TNE agreements do not require the approval of the Council of Ministers, as is the case for universities from countries that do not have a general educational MOU in place.

At the university level in Saudi Arabia, the approval process for TNE partnerships largely depends on whether the TNE collaboration relates to a single, specific programme e.g. a new joint degree, or whether the TNE component takes the shape of a larger collaboration between the two universities.

In the case of the latter, the TNE component may fall under the framework of either an **MoU** or an **Agreement of collaboration**, which require the approval of the MOE. An MOU tends to be a relatively broad agreement that might include commitments to engage in TNE alongside research, student exchange programmes and other forms of collaboration. As a general rule, MOUs do not contain financial commitments, although they might include an agreement to provide reciprocal services, for example, the universities might agree to cover the accommodation, maintenance and teaching costs for each other's students or teachers as part of an exchange programme. Programmes that already fall under the scope of an MoE-approved MoU do not need additional approval at the programme level.

Alternatively, specific, individual TNE programmes may be agreed within the framework of an **Executive agreement**, an **Executive programme** or a **Service contract**. These agreements

⁷⁵ Council of Universities Affairs (2023). *Executive rules for the organizational regulations for foreign university branches*.

generally do not require the approval of the MOE and may include financial provisions that enable one university to provide payment to the other, or enable the universities to share the revenues from a programme.

University processes

At the university level, the initial process for setting up the agreement, whether it is an MOU, Agreement of collaboration, an Executive agreement, an Executive programme or a Service contract is broadly similar. Suggestions for a potential TNE partnership may come from anywhere within the faculty or it may originate with dedicated partnership professionals who have been contacted by foreign universities. In any event, agreements will then usually pass through a partnership and collaboration office, or individual, as well as the legal department, before being passed to the rector or dean and finally to the board of the university. At each stage, the partnership must be approved, and may be rejected, queried or altered, before it moves on.

One interviewee noted that the board usually approves agreements once they have been signed off by the rector or dean, who holds the ultimate responsibility for ensuring that the agreement is implemented and is therefore a key stakeholder in the process.

Interviewees indicated that there was sometimes a “back and forth” process at different stages of progression. The academic standing and ranking of the proposed partner, specific areas of expertise and the capacity to add value to the Saudi university were underlined as key considerations when approving partnerships.

Once approved by the universities, executive agreements, executive programmes, service contracts and other similar agreements may be implemented immediately. However, MOUs and agreements of collaboration must be submitted to the MOE by the Saudi university for approval.

MOE processes

The MOE approval process was also described by the participants in this research as requiring some back and forth. Estimates of the timeframe required to approve MOUs and similar agreements varied substantially and ranged from “three to four months if all goes well” to “six months”, “over a year”, “one and a half years” and “a couple of years”. Two participants noted that the approval times are variable because MOUs must be approved by a board at the MOE and the meetings take place periodically. One noted that they do not have good visibility of the process once the MOU has been submitted to the MOE.

Two interviewees indicated that the MOE “usually approves” MOUs, but one had experience of MOUs being rejected. Reasons that partnerships had been turned down included the existence of prior agreements that are perceived as being too similar to the proposed partnership or the existence of a prior MOU that was not successfully followed up by the parties involved or did not result in a meaningful partnership.

Our conversations with representatives of Saudi universities also indicated that they expect more regulatory change in this area in future, as the Saudi government continues to move towards increasing the levels of privatisation and independence in the university sector. As yet, the nature of any eventual changes and the timeline for their implementation remains unclear. However, one interviewee noted that the MOE is expected to hand over the responsibility of approving educational MOUs in the near future to the [CUA](#). The participant noted that this

change is designed to speed up and facilitate the process of implementing partnerships and was hopeful that this outcome could be achieved.

Exceptions

It may also be noted that the pathway described above applies to all universities that fall under the remit of the MOE. However, there are a small number of universities in Saudi Arabia for whom this does not apply. This is notably the case of King Fahd University of Petroleum and Minerals (KFUPM), whose board is chaired by H.R.H. Prince Abdulaziz Salman, the Minister of Energy and King Saud University, which has been an independent non-profit academic institution under the auspices of the Royal Commission for Riyadh City (RCRC) and its Chairman H.R.H. Prince Mohammed bin Salman since 2023.^{76 77}

In addition to not requiring the approval of the MOE, TNE partnerships with these institutions may also require fewer approvals within the university itself, usually involving the academic council and board of trustees. One interviewee indicated that these universities tend to approve a general model for each kind of TNE provision and is then able to roll this model out with an unlimited number of partners without seeking further approvals.

Our interviewees suggested that these institutions may have greater capacity to implement TNE programmes than other Saudi partners via processes that are quicker and more flexible.

Research collaboration

The process for setting up research collaboration between Saudi and UK universities was described as similar to that of setting up a TNE agreement. In most cases, a structured research agreement would require the signature of an MOU between the two universities and the same approvals processes as described above. One interviewee noted that when a Saudi university is signing an MOU with an international partner, it will often attempt to include as many elements as possible within the scope of the same MOU. For example, an MOU may have provisions that enable the two universities to collaborate on student exchange and the joint provision of degree programmes as well as research collaboration. In some cases, the research collaboration may be the trigger for setting up the MOU. In others, the MOU is put in place and researchers are subsequently notified that it has been implemented and invited to create research links.

It was noted by that Saudi universities are generally reluctant to include specific commitments with regard to funding in MOUs.

However, one interviewee did note that researchers may also work together more informally, based on their own personal relationships with academics from other universities, without the need for a formal and structured agreement.

⁷⁶ KFUPM. (n.d.). About us. [online] Available at: <https://www.kfupm.edu.sa/about-us> [Accessed 17 Mar. 2024].

⁷⁷ spa.gov.sa. (n.d.). HRH Crown Prince Issues Supreme Order Forming King Saud University's Board of Directors. [online] Available at: <https://www.spa.gov.sa/en/0cd0307550y> [Accessed 17 Mar. 2024].

Accreditation and quality mechanisms

The Saudi government, via the MOE, has undertaken a number of reforms in recent years with the aim of improving quality standards in higher education. One major reform was the creation of the National Commission for Academic Accreditation and Assessment (NCAAA) in 2004.

The NCAAA was initially overseen by the MOE. However, in 2018 it was placed under the Education and Training Evaluation Commission (ETEC), which was established by Royal Decree. ETEC ensures the evaluation of public and private education in Saudi Arabia, builds-norms for public education curricula in coordination with the MOE and approves and updates them periodically.⁷⁸

Via the British Council, the NCAAA has also collaborated with the UK's Quality Assurance Agency for Higher Education (QAA), notably with regard to training local reviewers on the NCAAA system.⁷⁹

Since the publication of the new LOU, all universities must now seek to obtain both institutional and programme accreditation from ETEC. The focus on quality is also reiterated in the law for university branch campuses, which states that the university branch must “commit to ensuring the quality of all the academic programmes it offers and complying with the requirements of the ETEC in this regard”.

For UK universities seeking to establish branch campuses, this implies that both institutional and programme accreditation would be required in order to operate. For those seeking to establish other academic partnerships without setting up a physical presence within Saudi Arabia, only programme accreditation may be required. For any other type of partnerships, the Saudi-based university partner is required to ensure that their partners are adhering to the NCAAA standards, and to review their partnerships periodically as part of their institutional accreditation process. There is no specific accreditation process for TNE programmes beyond the standard requirements for domestic degrees.

Institutional accreditation

According to the NCAAA's 2022 Institution accreditation standards, there are eight main areas on which institutions are assessed:

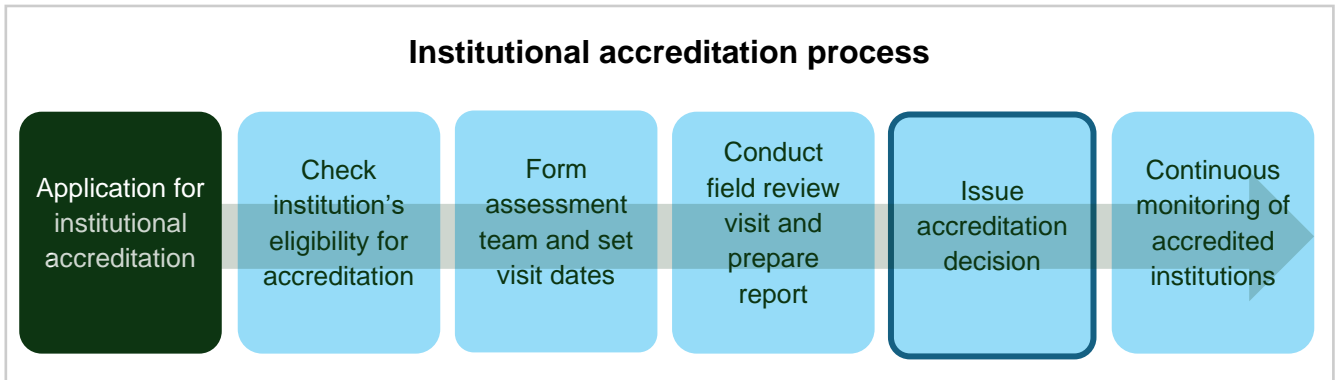
1. Vision, mission and strategic planning
2. Governance, leadership, and management
3. Teaching and learning
4. Students
5. Faculty and staff
6. Institutional resources
7. Research and innovation
8. Community partnership

⁷⁸ ETEC (2024). [online] Etec.gov.sa. Available at: <https://www.etec.gov.sa/en/ncaaa>.

⁷⁹ Effective partnerships – building capacity for quality in Saudi Arabian Higher Education institutions: an evaluation. (n.d.). [online] International Network for Quality Assurance Agencies in Higher Education (INQAAHE) . Available at: https://www.inqaahe.org/sites/default/files/pictures/Effective%20partnerships%20-%20building%20capacity%20for%20quality%20in%20Saudi%20Arabian%20Higher%20Education_Darandari%20and%20Ward.pdf.

See appendix for further details on each of these areas.

Obtaining academic accreditation from the NCAAA requires the institution to submit a self-study report covering all academic and administrative activities and services to determine their quality levels based on NCAAA standards. The institution is also required to undergo an external evaluation by an independent evaluation team to check the findings of the self-study report.⁸⁰



Source: Itri Insights, ETEC

Programme accreditation

Programme accreditation is a certification granted to the education institution by NCAAA, proving that the education and scientific research activities carried out by the institution meet the minimum requirements of quality standards.

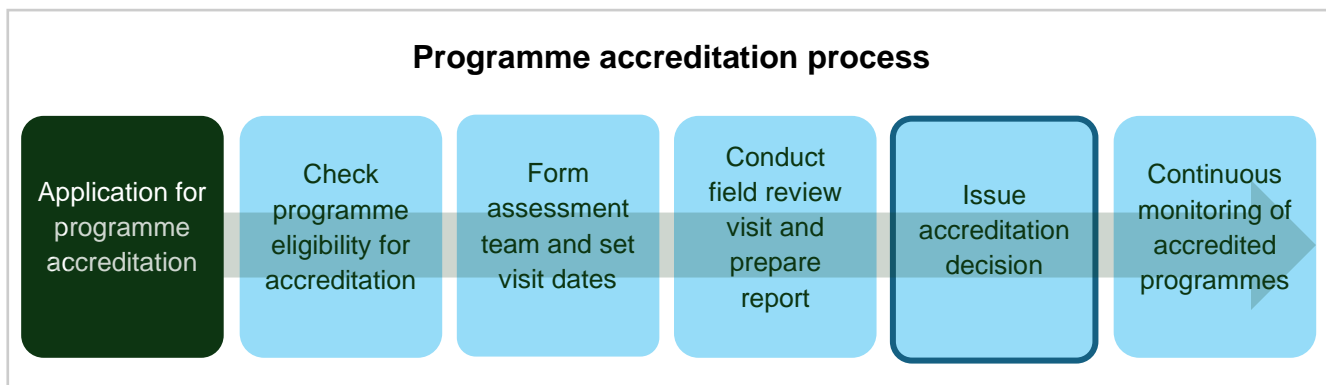
According to the NCAAA's 2022 Programme accreditation standards, there are five main areas on which programmes are assessed:

1. Programme management and quality assurance
2. Teaching and learning
3. Students
4. Faculty
5. Learning resources, facilities and equipment

Each standard is further broken down into sub-sections detailing the specific criteria that must be met. A separate set of standards is applicable to post-graduate programmes of study, with a section dedicated to research and projects.⁸¹

⁸⁰ Institution Accreditation Standards. (2022). [online] NCAAA . Available at: <https://dqd.ksu.edu.sa/sites/dqd.ksu.edu.sa/files/users/user196/%D9%88%D8%AB%D8%A7%D8%A6%D9%82%20%D8%A7%D9%84%D9%87%D9%8A%D8%A6%D8%A9%20%D8%A7%D9%86%D8%AC%D9%84%D9%8A%D8%B2%D9%8A/NCAAA%20Standards%20and%20Templates/2022%20NCAAA%20December%202022/NCAAA%202022%20Stanards/NCAAA%202022%20Institution%20Accreditation%20Standards.pdf>.

⁸¹ Program Accreditation Standards. (2022). [online] NCAAA . Available at: <https://dqd.ksu.edu.sa/sites/dqd.ksu.edu.sa/files/users/user196/%D9%88%D8%AB%D8%A7%D8%A6%D9%82%20%D8%A7%D9%84%D9%87%D9%8A%D8%A6%D8%A9%20%D8%A7%D9%86%D8%AC%D9%84%D9%8A%D8%B2%D9%8A/NCAAA%20Standards%20and%20Templates/2022%20NCAAA%20December%202022/NCAAA%202022%20Stanards/NCAAA%202022%20Program%20Accreditation%20Standards.pdf>.



Source: Itri Insights, ETEC

Saudi Global Ranking (SGR)

In addition to program and institutional accreditation, ETEC is also seeking to improve the quality of higher education institutions and programs through the Ranking of Higher Education Institutions Initiative: Saudi Global Ranking. The initiative targets governmental and private universities, governmental and private colleges, and regional and international universities and colleges licensed to operate within Saudi Arabia. The objectives of this initiative are:

1. Enhancing quality and excellence in the educational process.
2. Institutional excellence for higher education institutions.
3. Raising the level of efficiency, effectiveness, and sustainability.
4. Alignment with the labour market, empowering the community, and promoting sustainable development.
5. Stimulating research, development, and innovation.

To be eligible for Ranking consideration, the institution, and or the program needs to have attained full or conditional accreditation status.

There are two ranking categories for higher education institutions:

1. Educational category: it includes indicators related to quality of teaching and learning, compatibility with labour market and social service activities and is applicable to all governmental and private higher education institutions
2. Comprehensive category: it includes indicators for education and research performance, compatibility with labour market and social service activities and is optional for universities with research activities

All information regarding submitting ranking data, and ranking guides are available on SGR website.⁸² Currently, there is no published information available on the rankings of higher education institutions in Saudi Arabia or the expected release date of the first SGR report. However, accredited institutions in Saudi Arabia can still participate by submitting their ranking data for consideration in the upcoming assessments.

Participation in the ranking process is typically voluntary, yet its implications extend far beyond mere voluntary engagement. The initiative could significantly influence student recruitment efforts in the future, serving as a crucial factor for prospective students in assessing the quality and reputation of higher education institutions. Moreover, the Saudi government has

⁸² Saudi Global Ranking Accessed [21 April. 2024] <https://sgr.etc.gov.sa/index-en.html#classification>
<https://opportunities-insight.britishcouncil.org/>

strategically linked this endeavour to the second pillar of its Vision 2030, underlining its pivotal role in advancing the nation's socioeconomic objectives. Consequently, for universities operating in Saudi Arabia and striving to align with Vision 2030 goals, potentially applying for inclusion in the Saudi Global Ranking (SGR) becomes not just a choice but a strategic imperative.

Degree equivalency

Degree equivalency requests are managed in Saudi Arabia by the Directorate of Equivalency, which is part of the MOE. Students can apply to have their overseas qualifications recognised via an online platform and can challenge equivalency rulings.

The equivalency of degrees is assessed based on a number of factors, the most important of which are:

- The education system and number of years of study according to which the certificate was issued.
- The curriculum and study plan applied.
- The duration of the academic year and the number of study days.
- The admissions and examination systems.
- The level of certification in the issuing country.

The most common reasons for the rejection of equivalency requests are:

- Forged certificates.
- The deletion or modification of certificate data.
- A short course duration or a low number or lack of study materials.
- Certificates from educational institutions that do not require academic progression.
- Certificates awarded by private schools and associations via affiliation.
- Certificates awarded via distance learning, by correspondence or the via the internet.

The final factor in the list above is particularly relevant to UK HEIs offering distance learning programmes in Saudi Arabia, as these qualifications are not officially recognised by the Saudi government (with the exception of the Arab Open University's collaborative partnership with the Open University in the UK). This means that distance learning students can generally only use their qualifications for employment in the private sector or outside of Saudi Arabia.

It should be noted that it is usually necessary to be a full-time student at the awarding university and be resident in the country of the awarding university in order for degree equivalency to be recognised, particularly for associate, bachelor's degrees and higher diplomas. However, residency for the whole duration of a master's degree or doctorate is not required in all cases.

Students who do not achieve equivalency for their foreign degrees may face several limitations in Saudi Arabia, including restrictions on public sector employment and prohibition from practicing regulated professions such as law or architecture, in addition to not being able to pursue further education within Saudi Arabia based on their foreign degree.⁸³ In addition they may experience difficulty with recruitment or hindered promotion in some private sector roles. Accordingly, UK universities seeking partnerships in Saudi Arabia, are encouraged to consider their degrees' eligibility to equivalency regulations.

⁸³ University Certificate Equalization, Rules and Regulations summary Accessed [20 April. 2024].
https://eqs.moe.gov.sa/app/content/docs/RulesAndRegulationsSummary.pdf?20210926_154409553
<https://opportunities-insight.britishcouncil.org/>

Prospects for UK TNE in Saudi Arabia

The UK and Saudi Arabia have a history of close ties in the field of Higher Education. In March 2018, the UK and Saudi Arabia launched the UK-KSA Education Partnership, while the UK-KSA Education Steering Committee identified higher education as a priority area for of collaboration, including scientific research and innovation and transnational education.

Separately, the UK government's updated edition of its International Education Strategy: global potential, global growth', published in 2021, specifically notes that "supporting UK providers to identify opportunities resulting from the Saudi Arabian Government's Vision 2030 programme and engaging with potential Saudi partners" remains a priority.⁸⁴

It is also worth noting that the UK's first International Education Champion, Professor Sir Steve Smith, who was appointed in June 2020, was also appointed as the UK Prime Minister's Special Representative for Education to Saudi Arabia in October 2020.⁸⁵

On the Saudi side, Saudi Arabia's Minister of Education Yousef Al-Benyan stated in December 2023 that the strategic partnership between the two countries focuses on six main areas, namely:

1. Building a stronger and deeper partnership in the field of education.
2. Supporting the professional development of Saudi educators and enhancing their knowledge, skills and abilities.
3. Enhancing cooperation and partnerships in university education.
4. Research cooperation.
5. Student scholarships.
6. Transnational education.

Al-Benyan also particularly underlined the fact that the partnership aims to "increase the participation of the British private education sector in Saudi education and establish British schools and universities". His comments came on the back of a series of roundtable meetings in Saudi Arabia involving representatives from the country and 18 British universities.⁸⁶

Types of UK-Saudi TNE currently in effect

Analysis of the kinds of TNE arrangement currently in effect between the UK and Saudi Arabia, is based on analysis of data from the Higher Education Statistics Agency (HESA), interviews with representatives of UK and Saudi universities, and other desk-based research.

This approach suggests that there are three major strands to current UK TNE provision in Saudi Arabia, namely, TNE provision via the Open University (OU) in partnership with the Arab Open University (AOU), TNE provision via distance learning, and finally, other forms of provision that

⁸⁴ Department for International Trade (2019). International Education Strategy: global potential, global growth. [online] GOV.UK. Available at: <https://www.gov.uk/government/publications/international-education-strategy-global-potential-global-growth/international-education-strategy-global-potential-global-growth>.

⁸⁵ www.exeter.ac.uk. (n.d.). Professor Sir Steve Smith | Honorary graduates | University of Exeter. [online] Available at: <https://www.exeter.ac.uk/about/honorarygraduates/2023/timetable/ceremony2/> [Accessed 17 Mar. 2024].

⁸⁶ Arab News. (2023). Saudi Arabia, UK discuss boosting educational partnership. [online] Available at: <https://www.arabnews.com/node/2420991/saudi-arabia> [Accessed 17 Mar. 2024].

might be considered “in-person TNE” according to the general definitions used in the UK HE sector. These strands are explored in more detail below.

The Open University

The Open University (OU) is a partner of the Arab Open University (AOU), which has its main campus in Kuwait with a branch in Saudi Arabia amongst other countries. According to HESA data, of the 74 UK universities providing TNE in Saudi Arabia in 2021/22, the OU was by far the leader, with 14,335 students, representing 87% of the overall total number of students receiving UK TNE.

According to the HESA data, almost all students in Saudi Arabia enrolled with the OU in 2021/22 (14,335 students or 99.7%) were registered with an overseas partner organisation and studying for an award of the OU. All of these students were studying bachelor’s degree programmes.

When taken alongside what is known about the OU-AOU partnership, this suggests that the vast majority of OU students are accessing these degrees via the validated programmes offered by the AOU. The remaining 50 students (0.3%) were registered directly with the OU and were pursuing their studies via distance, flexible and/or distributed learning.

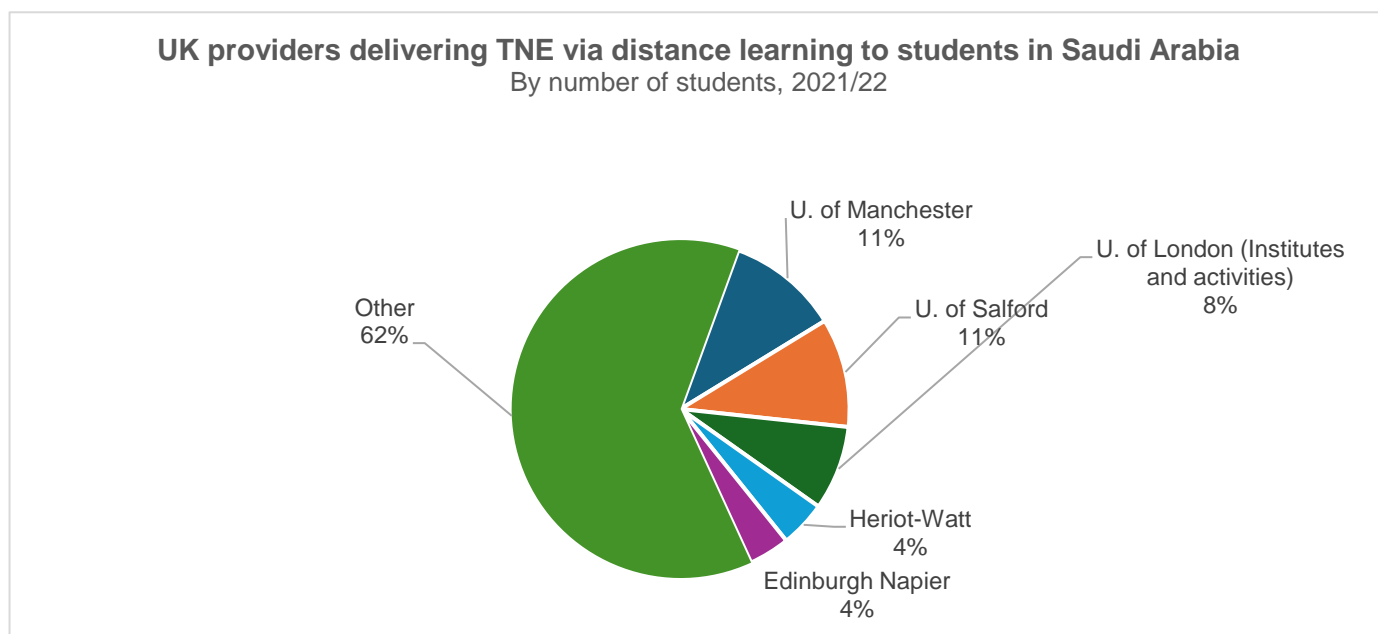
The number of students in Saudi Arabia studying with the OU also increased over the five years to 2021/22, with a Compound Annual Growth Rate of 23%. Placing the OU example in context, the overall trend for UK TNE globally saw registrations rise by an average of just 7% over the five years between 2017/18 and 2021/22. As such, the rate of growth in student registrations

TNE provision via distance learning

Of the remaining 2,175 students in Saudi Arabia enrolled in UK TNE programmes, 1,960 students (90%) were enrolled in distance, flexible and distributed learning for a UK HE award. In most cases this does not involve any teaching provided by the UK institution within Saudi Arabia, although there are some exceptions as described below.

The numbers of students in Saudi Arabia enrolled in these UK TNE programmes remained relatively stable in the five years to 2021/22, with a Compound Annual Growth Rate of just 2%.

Amongst these students, 1,630 (83%) were enrolled on taught master’s programmes, with 255 students (13%) enrolled to study bachelor’s degrees. A further 40 students (2%) were studying



Source: HESA data

for research doctorates and the remaining 45 students (2%) were studying for higher education certificates.

The University of Manchester was the top university in terms of its number of distance learning students in Saudi Arabia, with 205 students representing 11% of the total for distance learning. It should be noted that since 2006, the University of Manchester has run a dedicated Middle East Centre located in Dubai, which also serves students in Saudi Arabia. The centre, which is 100%-owned by the University of Manchester, offers blended delivery that combines online learning with intensive face-to-face workshops. Core modules are attended at the Middle East Centre although students have the option of attending elective modules in various locations including the UK.⁸⁷

The centre primarily targets working professionals, offering a part-time MBA programme, an executive MBA, a part-time MSc in Financial Management a part-time MA in Educational Leadership in Practice in addition to short professional development courses.⁸⁸ This tallies with the HESA data confirming that all of the students in Saudi Arabia enrolled in a University of Manchester TNE programme via distance learning in the last five years were studying for a taught master’s degree.

The University of Salford was the second largest UK provider of distance learning programmes, with 200 students, representing 10% of the total – again, all of these students were enrolled on taught master’s courses.⁸⁹

⁸⁷ The University of Manchester. (n.d.). FAQs. [online] Available at: <https://www.manchester.ac.ae/faq> [Accessed 17 Mar. 2024].

⁸⁸ The University of Manchester. (n.d.). FAQs. [online] Available at: <https://www.manchester.ac.ae/faq> [Accessed 17 Mar. 2024].

⁸⁹ It is possible that some of these students may be enrolled through Salford’s franchise agreement with the Robert Kennedy College (RKC) in Switzerland, which delivers courses via 100% online learning to students from <https://opportunities-insight.britishcouncil.org/>

Other universities with a relatively high number of students in Saudi Arabia studying on UK TNE programmes via distance, flexible and distributed learning, such as the University of London (155 students), Heriot-Watt University (85 students) and Edinburgh Napier University (75 students), and the Open University (55 students) These universities maintain dedicated resources specifically designed to support online students.^{90 91 92 93} In the case of the University of London, although the University works with local teaching centres across a number of countries which provide in-person support to students registered on its distance learning degree programmes, the University of London's website does not list any of these centres in Saudi Arabia.

As noted in a previous section, UK readers should note that these overseas distance learning programmes are not officially recognised in Saudi Arabia, and students will not be able to receive the equivalency certification required to use their degrees in public-sector employment or for further study within Saudi Arabia. However, they may still be recognised by some private companies.

In-Person UK-Saudi TNE

According to HESA data, in the 2021/22 academic year, there were just 215 students enrolled in what might be considered "in-person" TNE programmes provided by UK universities, i.e. programmes that are not delivered primarily by distance or online learning. This includes students who were registered with UK universities and those who were registered with Saudi partner organisations.

It is immediately of note that none of the students in Saudi Arabia enrolled on this kind of UK TNE course in 2021/2022 were studying for a bachelor's degree. This marks out the experience of these universities as different from those of the OU, where most students were studying for bachelor's degrees. For in-person TNE, 185 students (86%) were studying for a taught master's degree with the remaining 30 students (14%) enrolled to study a research doctorate. This was not always the case, as five years earlier, in the 2017/18 academic year, 265 bachelor's students accounted for 51% of the total. However, these students were almost all studying at Ulster University, which no longer offers this provision as discussed in more detail below.

Overall, the number of students in Saudi Arabia studying TNE programmes fell from 520 in 2017/18 to 215 in 2021/22, for a Compound Annual Growth Rate (CAGR) of -20%. TNE number fell each year to 2020/21, before rising again in 2021/22. The single biggest drop in numbers came between 2017/18 and 2018/19, when the number of students fell to 235, or a 55% drop year-on-year.

across the world. See Salford, T.U. of (n.d.). Studying online with Robert Kennedy College | University of Salford. [online] www.salford.ac.uk. Available at: <https://www.salford.ac.uk/salford-business-school/studying-online-with-robert-kennedy-college> [Accessed 17 Mar. 2024].

⁹⁰ www.london.ac.uk. (n.d.). *Online learning | University of London*. [online] Available at:

<https://www.london.ac.uk/study/where-study/online-learning>

⁹¹ Heriot-Watt University Online. (n.d.). *Online Degree Courses | Heriot-Watt University*. [online] Available at: <https://www.hw.ac.uk/online/> [Accessed 17 Mar. 2024].

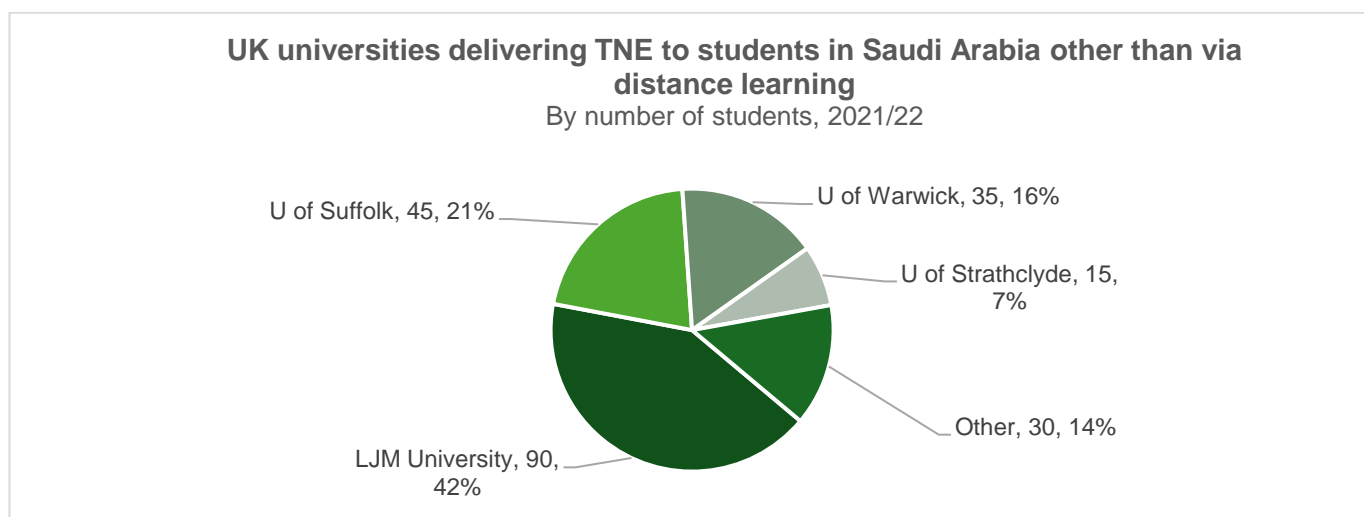
⁹² Napier. (n.d.). *Online study*. [online] Available at: <https://www.napier.ac.uk/study-with-us/online> [Accessed 17 Mar. 2024].

⁹³ HESA Data (2021/2022) [Accessed 21 April. 2024]

<https://opportunities-insight.britishcouncil.org/>

The significant drop that took place between 2017/18 and 2018/19 may largely be attributed to a reduction in the number of students at the University of Roehampton and Ulster University. The students at the University of Roehampton had been enrolled on taught master's programmes that reported no further students after 2018/19. However, no additional details about these programmes are available.

In the case of Ulster University, in 2006, the university signed a 10-year agreement to train a minimum of 1,000 nurses in Saudi Arabia in collaboration with the SAAD Nursing and Allied Health Science College of Al-Khobar. Students followed a five-year programme for a BSc [Honours] in Nursing from Ulster University involving online learning on a course provided by a team of lecturers blended with traditional nurse education techniques including a yearlong internship.⁹⁴ This partnership would have been reaching its natural conclusion in 2017/2018 when the numbers began to fall from 255 students to 195 in 2018/19, 70 in 2019/20, 20 in 2020/21 and none in 2021/22. In this case, the fall in numbers is reflective of the programme reaching the end of its intended life cycle.



Source: HESA data

In 2021/22, Liverpool John Moore's University (LJMU) was the largest provider of UK TNE to students in Saudi Arabia, with 90 students representing 42% of the total. The university has also seen significant growth in this area the past five years. The first students in Saudi Arabia to pursue TNE with the university were registered in 2019/20. From just five students registered to study a taught master's programme at that time, the numbers grew rapidly to 45 in 2020/21 and 85 in 2021/22.

No further details of these master's programmes are available. However, in 2019, LJMU and Dar Al Uloum University also signed a partnership agreement to launch a Bachelor of Nursing programme at the College of Pharmacy and Applied Medical Sciences. The agreement between the universities states that LJMU would offer academic curricula and advisory services to support the Bachelor of Nursing programme.⁹⁵

⁹⁴ The Irish Times. (n.d.). *University of Ulster to train Saudi nurses*. [online] Available at: <https://www.irishtimes.com/news/university-of-ulster-to-train-saudi-nurses-1.769237> [Accessed 17 Mar. 2024].

⁹⁵ DAU University. (2019). *DAU & Liverpool John Moores University launch Nursing Program*. [online] Available at: <https://dau.edu.sa/en/dau-liverpool-john-moores-university-launch-nursing-program/> [Accessed 17 Mar. 2024]. <https://opportunities-insight.britishcouncil.org/>

LJMU also has two students who have graduated from the External Joint Supervision Programme (EJSP) with King Saud University, which is analysed in greater detail below.⁹⁶

The second largest provider of UK TNE to students in Saudi Arabia, the University of Suffolk, has also seen rapid growth in its Saudi TNE student numbers in recent years. The number of students on taught master's programmes rose from zero in 2018/19 to five in 2019/20 to 35 in 2020/21 and 40 in 2021/22. The University of Suffolk now accounts for 21% of students enrolled in this kind of TNE. No further details about the University of Suffolk's TNE provision in Saudi Arabia are available.

There is a similar picture at the University of Warwick, where 30 students were enrolled in taught master's programmes in 2020/21 increasing to 35 students in 2021/22. There are no additional details available about the master's programmes being delivered via TNE in Saudi Arabia. However, it is known that the Warwick Medical School has an MOU with King Saud University. The MOU includes both research and training collaboration in the field of diabetes.⁹⁷ Our discussions with Saudi universities suggest that MOUs often include both research and teaching provisions.

Overall, the number of UK universities delivering TNE to students in Saudi Arabia remained relatively stable over the five years to 2021/22, increasing from eight universities in 2017/18 to nine universities in 2021/22. However, the composition of these universities changed significantly over this period. Indeed, of the eight universities providing this kind of TNE to students in Saudi Arabia in 2017/18, just two were still delivering this provision in 2021/22. These universities were the University of Strathclyde and the University of Leeds.

The University of Strathclyde provides research doctorates via TNE to students in Saudi Arabia, with the number of students remaining stable at 15-20 students over the five years to 2021/22. The University of Strathclyde has research agreements in place for PhD students with three universities in Saudi Arabia, namely Princess Nourah bint Abdulrahman University, the University of King Abdulaziz and King Saud University (KSU).⁹⁸ In the case of KSU, the University of Strathclyde also has one student who has graduated from the EJSP between the two universities.

A number of other UK universities report that they are delivering TNE to a small number of students (10 or fewer) in Saudi Arabia not via distance learning, including the University of London City, Edinburgh Napier University, Keele University, the University of Leeds and the University of Surrey. At least some of these universities have students enrolled in the King Saud EJSP programme.⁹⁹

Going beyond the HESA data, the External Joint Supervision Programme (EJSP) led by KSU appears to have been a successful area of collaboration for UK universities after it was

⁹⁶ ejsp.ksu.edu.sa. (n.d.). GraduationNA | External Joint Supervision Program (EJSP). [online] Available at: <https://ejsp.ksu.edu.sa/en/node/596> [Accessed 22 Mar. 2024].

⁹⁷ warwick.ac.uk. (n.d.). Warwick to collaborate with King Saud University. [online] Available at: <https://warwick.ac.uk/fac/sci/med/news/news/saudi/> [Accessed 17 Mar. 2024].

⁹⁸ www.strath.ac.uk. (n.d.). International students | University of Strathclyde. [online] Available at: <https://www.strath.ac.uk/science/computerinformationsciences/studywithus/internationalstudents> [Accessed 17 Mar. 2024].

⁹⁹ ejsp.ksu.edu.sa. (n.d.). Graduation NA | External Joint Supervision Program (EJSP). [online] Available at: <https://ejsp.ksu.edu.sa/en/node/596> [Accessed 22 Mar. 2024].

launched in 2009. The EJSP is based on a split-site joint supervision model for a full-time PhD programme. Students on the EJSP programme have a primary supervisor from an international university and a co-supervisor from KSU, with up to two months of study taking place at the international university.¹⁰⁰

The EJSP is theoretically open to all highly ranked universities. However, 43 of its 48 current students (90%) and a large proportion (81%) of successful graduates are or were jointly supervised by UK universities. Outside the UK, Belgium, Denmark, the Netherlands, Spain and Switzerland each currently have one student enrolled on the EJSP, together accounting for the remaining 10%. For graduated students, four graduates (10%) were supervised by US universities, two (5%) by Japanese universities, one (2%) by a German university and one (2%) by an Italian university.^{101 102}

King Saud – UK universities: EJSP students by university				
	Current students	% of total	Graduated students	% of total
University of Leeds	12	28%	4	12%
Queen’s University Belfast	6	14%	0	0%
University of Manchester	5	12%	2	6%
University of York	4	9%	0	0%
University of Birmingham	3	7%	3	9%
University of Aberdeen	2	5%	5	15%
University College London	2	5%	3	9%
Newcastle University	2	5%	5	15%
University of Leicester	1	2%	1	3%
Bournemouth University	1	2%	0	0%
Queen Mary University of London	1	2%	0	0%
University of Glasgow	1	2%	0	0%
University of Liverpool	1	2%	0	0%
University of Stirling	1	2%	0	0%
University of Birmingham	1	2%	0	0%
University of Brighton	0	0%	5	15%
Liverpool John Moore's University	0	0%	2	6%
Goldsmiths, University of London	0	0%	1	3%
Imperial College London	0	0%	1	3%
Northumbria University	0	0%	1	3%
University of Strathclyde	0	0%	1	3%
TOTAL	43	100%	34	100%

Source: King Saud University

In terms of sector specialisation, the most popular option for students currently enrolled in the EJSP programme is English language and translation with 13 students (30%) currently studying

¹⁰⁰ Anon, (n.d.). *What is EJSP?* [online] Available at: https://ejsp.ksu.edu.sa/sites/ejsp.ksu.edu.sa/files/users/user977/What%20is%20EJSP-%20Jan%202023_1.pdf [Accessed 22 Mar. 2024].

¹⁰¹ Anon, (n.d.). *EJSP Graduated Student List.* [online] Available at: <https://ejsp.ksu.edu.sa/en/node/596> [Accessed Mar. 24, 2024].

¹⁰² ejsp.ksu.edu.sa. (n.d.). *StudentsN | External Joint Supervision Program (EJSP).* [online] Available at: <https://ejsp.ksu.edu.sa/en/node/2866> [Accessed 24 Mar. 2024].

for a jointly supervised PhD in this area. By contrast, the largest number of UK EJSP graduates is found in the pharmacy sector.^{103 104}

King Saud – UK universities: EJSP students by subject specialisation				
	Current students	% of total	Graduated students	% of total
English language & translation	13	30%	4	12%
Pharmacy	9	21%	12	35%
Applied medical sciences	9	21%	6	18%
Computer and information sciences	7	16%	2	6%
Business administration	2	5%	0	0%
Education	1	2%	4	12%
Applied studies & community service	1	2%	3	9%
Nursing	1	2%	0	0%
Common first year	0	0%	1	3%
Food and agricultural sciences	0	0%	1	3%
Other sciences	0	0%	1	3%
Total	42	100%	34	100%

Source: King Saud University

It is important to note that KSU is Saudi Arabia’s oldest university and has been an independent non-profit academic institution under the auspices of the Royal Commission for Riyadh City (RCRC) and its Chairman H.R.H. Prince Mohammed bin Salman since 2023.¹⁰⁵ As such, it enjoys greater independence in implementing partnerships than the majority of Saudi universities and does not require the approval of the MOE to set up and run TNE programmes.

Besides the EJSP, our own survey of Saudi University partnerships suggests that 20 UK universities have partnerships in place in Saudi Arabia. Not all of these partnerships may be TNE related, however, some may have a TNE component. The full list of UK universities cited as partners by Saudi Universities includes Queen's University Belfast, the University of Exeter, the University of Glasgow, the University of Newcastle, the University of Strathclyde, Imperial College London, International House London, Loughborough University, the Open University, the Royal National College of the Blind, the University of Birmingham, the University of Dundee, the University of Edinburgh, the University of Essex, the University of Exeter, the University of Leeds, the University of Liverpool, the University of Manchester, the University of Nottingham and the University of Swansea.

During our discussions with UK and Saudi university representatives, we were also able to shed some additional light on the state of TNE collaboration between the UK and Saudi Arabia. The programmes cited by UK universities included **professional training** and **Continuing Professional Development (CPD)** short courses, **pre-sessional** and **foundation** programmes

¹⁰³ Anon, (n.d.). *EJSP Graduated Student List*. [online] Available at: <https://ejsp.ksu.edu.sa/en/node/596> [Accessed Mar. 24, 2024].

¹⁰⁴ ejsp.ksu.edu.sa. (n.d.). *StudentsN | External Joint Supervision Program (EJSP)*. [online] Available at: <https://ejsp.ksu.edu.sa/en/node/2866> [Accessed 24 Mar. 2024].

¹⁰⁵ spa.gov.sa. (n.d.). HRH Crown Prince Issues Supreme Order Forming King Saud University’s Board of Directors. [online] Available at: <https://www.spa.gov.sa/en/0cd0307550y> [Accessed 17 Mar. 2024].

as well as **Postgraduate Taught** (PGT, generally master's) courses and **Postgraduate Research** (PGR, generally PhD) courses.

One Saudi university confirmed that it currently has three or four **dual postgraduate programmes** in place with UK universities. At this university, the teaching is sometimes shared between the Saudi university and the UK university, while at other times the teaching is delivered entirely by the UK university. The revenues for the courses are shared between both universities although information on the exact split was not available. Upon successful completion of their studies, students are awarded a degree from both universities.

Overall, however, the Saudi university representatives with whom we spoke were more likely to mention forms of international collaboration that did not include a specific teaching element such as student and teacher exchanges, curriculum development, staff capacity building and research collaboration. All interviewees nonetheless spoke of a keen interest in pursuing more TNE and in collaborating specifically with the UK in this area.

One Saudi university participant noted that it does not currently have any TNE collaboration with UK universities but is currently in the process of setting up a **postgraduate diploma** in engineering that would share the teaching between the Saudi and UK universities and would also share revenues, although the exact split of teaching and revenue sharing was not provided.

This echoed the experience of another Saudi university whose representative confirmed that their current international collaboration primarily takes the shape of research agreements, however they are keen to set up **joint** and **dual degrees** with UK universities, specifically in the context of **master's degrees**.

A third university representative also spoke of ongoing discussions to implement a joint PhD programme that would be studied jointly (50%-50%) between the Saudi and UK university.

Besides the existing TNE programmes, the Museums Commission of Saudi Arabia has recently developed a new **postgraduate diploma** in Museum Studies, which will be jointly delivered by SOAS University of London and Effat University in Jeddah. The programme is designed to begin April 2024.¹⁰⁶ The postgraduate diploma will provide theoretical and practical training in Museum Studies, and will include guest contributions from scholars, curators and museum professionals as well as in-person and virtual visits to London museums. Up to 10 students will be offered the opportunity to convert the postgraduate diploma into a masters (MA Museum Studies) by undertaking an additional dissertation module. The programme includes both in-person and online learning at Effat University and SOAS.¹⁰⁷

Combing the data from HESA, interviews with Saudi and UK universities and desk research, it appears that current UK-Saudi TNE provision is generally small-scale, often of short duration or delivered for an agreed fixed term, and predominantly postgraduate or linked to professional development. Some potential reasons for this are explored in more detail in the section on '[Challenges for UK-Saudi TNE](#)'.

¹⁰⁶ التسجيل (n.d.) [online] engage.moc.gov.sa. Available at: https://engage.moc.gov.sa/reg_form/tracks/4810/new [Accessed 17 Mar. 2024]

¹⁰⁷ www.soas.ac.uk. (2024). *Sponsored by the Saudi Museums Commission: SOAS-Effat University Joint Postgraduate Diploma in Museum Studies* | SOAS. [online] Available at: <https://www.soas.ac.uk/study/find-course/sponsored-saudi-museums-commission-soas-effat-university-joint-postgraduate> [Accessed 17 Mar. 2024]. <https://opportunities-insight.britishcouncil.org/>

Models of UK-Saudi TNE

Joint / dual degrees, articulation and progression agreements

The majority of in-person TNE partnerships identified during the course of this research, including desk research and discussions with both UK and Saudi universities, were joint and dual postgraduate degree programmes with some evidence of articulation and progression agreements. Universities in the UK noted that joint and dual degrees were often a preferred in general as model of engagement at the early stages of a TNE relationship as the legislative barriers are often lower. In the case of Saudi Arabia, there is still a significant regulatory aspect to creating joint or dual degrees, articulation and progression agreements, as discussed in the section on [TNE Legislation and Regulations in Saudi Arabia](#). However, it appears that these forms of TNE are still the least onerous in terms of regulatory requirements.

Immediately prior to the publication of this report, it was also announced that the University of Strathclyde had signed a service contract with Princess Nourah Bint Abdulrahman University, aimed at providing an executive Master of Business Administration programme. The structure of this cooperation was not immediately obvious.

Branch campuses

The Saudi government's interest in encouraging the creation of IBCs is clearly stated in the context of the publication of the new Executive Regulation governing the creation of foreign branch campuses in Saudi Arabia in

October 2023. In May 2024, immediately prior to the publication of this report, the University of Strathclyde also announced plans to become the first UK higher education institution to establish a physical presence within Saudi Arabia, in partnership with Princess Nourah Bint

Abdulrahman University. However, discussions with other UK universities we consulted during the course of this research suggested that they are not currently looking to expand their branch campus portfolio or that they would need to develop a positive working relationship with Saudi Arabia over a period of years or decades before considering this option.



Validation agreements

Due to the large number of students in Saudi Arabia currently studying for Open University-validated agreements via the Arab Open University, validation agreements currently account for the majority of TNE provision between the two countries. However, the OU-AOU agreement is not typical of the experience of other UK and Saudi universities as its programmes are delivered via distance learning. Interviews with UK and Saudi university representatives did not produce evidence of any other validation agreements.

Franchises

In the course of this research, we did not document any cases of what might be called existing franchise delivery for UK or non-UK universities in Saudi Arabia. The terminology and structure of franchise models appeared to be unfamiliar to many of the Saudi TNE professionals we interviewed, who were knowledgeable about the detail and structure of other TNE

arrangements. One interviewee noted that their university had been approached about the potential to set up a franchise agreement and suggested that the university was open to the idea and awaiting the right opportunity. Some UK universities, particularly top tier universities, expressed the view that they would not pursue franchise agreements anywhere in the world, although one suggested that it forms the majority of their TNE revenues.


Online and hybrid delivery

Multiple UK university representatives noted that online and hybrid programme delivery is commonplace in the UK and suggested that this might constitute an obstacle to providing TNE in Saudi Arabia. Two representatives noted that some programmes in Saudi Arabia featuring online or hybrid delivery were either “not funded” or “not recognised”, which they perceived as an obstacle to increasing the involvement of UK universities.

As noted above, a relatively large number of students in Saudi Arabia are studying on distance learning programmes taught by UK universities despite these restrictions, which suggests that there is still some demand for this mode of study – likely among people who work at private / international companies. It is not clear what proportion of these students are locals vs expatriates.

Strategic importance of Saudi Arabia

When determining the countries for TNE engagement, UK universities vary in their approaches, with some targeting specific regions or countries based on strategic considerations while others remain open to opportunities globally.



“WE SEE THAT SAUDI ARABIA IS BECOMING A REGIONAL HUB FOR TALENT AND MAJOR PROJECTS. THAT MAKES IT AN IDEAL LOCATION INTO WHICH WE CAN EXPAND”

In general terms, countries with well-established quality mechanisms are preferred, and those allowing greater operational independence are deemed more appealing. Word-of-mouth and past experiences significantly influence decisions, with successful implementations enhancing interest and failed partnerships deterring further engagement. On all of

these fronts, multiple UK university interviewees reported that Saudi Arabia often compared less favourably with other countries in the region or across the world.

Nonetheless, seven of the UK university representatives with whom we spoke during the preparation of this research reported that they had identified Saudi Arabia as a strategically important country for their TNE development, while the remaining three had more of a passive interest in the country. The high level of interest in Saudi Arabia amongst interviewees is likely to be partly the result of selection bias, given that universities with a significant interest in the country were more likely to volunteer their time to contribute to the research on this topic. Nonetheless, it does at least indicate that there is interest amongst some UK universities in pursuing TNE in Saudi Arabia.

By way of context, it may be noted that in the course of our research, 10 UK university representatives reported they do not have existing TNE partnerships with Saudi Arabia and do not intend to pursue TNE partnerships proactively in Saudi Arabia in the near future. Due to the

fact that these institutions declined to be interviewed for the research, it was not possible to explore the reasons behind their decision not to pursue TNE in Saudi Arabia.

Four of the interviewees that participated in the research framed their interest in pursuing TNE in Saudi Arabia within a broader context of an increased interest in the Middle East and the GCC states. Three universities noted that the region as a whole is attractive from a financial perspective, including one who felt that “if you invest in Saudi Arabia, you will get a return” and another who suggested that Saudi Arabia is “a wholly untapped market for TNE”.

The scalability of TNE programmes was also seen as a key advantage of engaging with Saudi Arabia that does not apply to many other markets. Although not all of the UK universities with whom we spoke were looking to expand their TNE provision at a large scale, some have plans to do so and cited this as a potential benefit.

Two university representatives noted that their interest in increasing ties with Saudi Arabia was motivated by climate concerns and the pursuit of the UN Sustainable Development Goals (SDGs). One noted that “you cannot address sustainability and transition without engaging the Gulf”.

Two interviewees also commented on their perceptions of the business environment for universities in Saudi Arabia. One felt that the operating environment in Saudi Arabia is perceived as more challenging than that of some of its neighbours. Another, who had been working closely with the region for over a decade, suggested that the university had noticed “a huge difference in dealing with Saudi Arabia” noting that “the change is the Kingdom is fantastic” and singling out the quality of students and the quality of their English language skills as particular areas of improvement.

However, some universities, particularly those in the earlier stages of their engagement with Saudi Arabia, felt that they did not clearly understand Saudi Arabia’s vision for TNE and how they might slot into it. For example, they were keen to understand how Saudi Arabia defines TNE as well as what is, and is not, allowed from a legal perspective. Universities also wanted to understand whether the country hopes that TNE will serve the local population, cater to expatriates within the country or even attract students from other countries in the region. In addition, uncertainty around the existence and content of quality mechanisms was also expressed by multiple participants.



“WE ARE SO KEEN TO WORK WITH SAUDI ARABIA BECAUSE OF THE ROLE THEY CAN PLAY IN THE PLANET’S FUTURE; WE WANT TO FIND PATHWAYS TO DO MORE”

UK university representative

Advantages of UK TNE in Saudi Arabia

When asked about the potential advantages of UK universities as TNE partners in Saudi Arabia, both Saudi and UK universities cited the long track record of educational engagement between the two countries. Multiple interviewees suggested that multiple generations of students from Saudi Arabia have been through the UK HE system and there is therefore a familiarity with the UK's ways of working.



“WE GET EXCITED ABOUT WORKING WITH THE UK BECAUSE WE KNOW THEIR SYSTEM AND WE KNOW HOW THINGS WORK.”

Saudi university representative

The participant also noted that there is a strong presence of UK corporates in Saudi Arabia, boosting the recruitment opportunities for graduates of UK institutions.

Another noted that the UK has a strong and successful TNE presence globally, with a well-established framework for TNE delivery as well as a reputation as a home for high quality research institutions.

The British Council's UK-Saudi Challenge Fund was also put forward as an advantage for UK TNE by one Saudi interviewee. The fund offers grants for UK and Saudi institutions to support research collaboration, internationalisation and transnational education. Grants of between 20,000 GBP and 40,000 GBP are available to UK universities, applying individually or as part of a consortium, to partner with universities or consortia from Saudi Arabia.¹⁰⁸


Opportunities for UK-Saudi TNE

The intersection between the interest of the UK government and universities in developing TNE in Saudi Arabia and the Saudi government's commitment to achieving Vision 2030, particularly with regard to its educational, economic and social aims, creates a number of potential opportunities for UK-Saudi TNE partnerships.

Sectoral areas of opportunity

Sustainability

Sustainability was identified as a priority for both Saudi and UK participants in this research. At least two UK universities noted that Saudi Arabia has a key role to play in safeguarding the planet's future and cited this as one of the main drivers for their interest in engaging with the country.



“WE WILL WORK TOWARDS LOCALISING RENEWABLE ENERGY AND INDUSTRIAL EQUIPMENT SECTORS”

Saudi Vision 2023

¹⁰⁸ saudiarabia.britishcouncil.org. (n.d.). *UK - Saudi Challenge Fund 2024 -Call is now open!* | British Council Saudi Arabia. [online] Available at: <https://saudiarabia.britishcouncil.org/en/programmes/education/UK-Saudi-Challenge> [Accessed 17 Mar. 2024].

On the Saudi side, the energy sector is a key concern, both with regards to diversifying away from a long-standing reliance on hydrocarbons and with regards to boosting the renewable energy sector, which has the potential to fuel technical and scientific demand in these areas. This was backed up by our conversations with Saudi university representatives who noted that sustainability and particularly renewable energy were of interest.

Besides energy, Saudi Arabia is also looking to improve its performance in water and waste management, pollution reduction and the reduction of desertification.

Environment, Social and Governance (ESG) has also been identified as an increasing demand within the Saudi market while London is recognised as leading the world in acceleration and adoption of the ESG agenda.¹⁰⁹

Healthcare

Improving the standard and quality of health care services is a key component of Saudi Arabia's Vision 2030.¹¹⁰ Health and welfare related degrees were also the second-most popular degree for Saudi students studying overseas in 2019.

According to our discussions with UK university representatives, many have significant expertise in healthcare and specific experience of providing international training and education in the fields of nursing, pharmaceuticals and biochemicals amongst others. Meanwhile, healthcare, medicine, pharmacy and dentistry were cited repeatedly in our interviews with Saudi university representatives as an area of interest.

The potential for increased collaboration in these areas was underlined in December 2023 by Saudi Arabia's Minister of Education Yousef Al-Benyan, who noted that the educational partnership between the two countries aims to "address skills gaps" and "train healthcare professionals" amongst other things.¹¹¹

Business

Business, administration and law were the most studied topics by Saudi students overseas according to the most recent data. Business Studies degrees are one of the main options offered to Saudi students by the OU (via the AOU) the UK's current leading TNE provider in the country and also by the University of Manchester via its hub in Dubai that also serves Saudi students via a flexible learning model.

This could indicate strong demand for delivery of international business programmes and qualifications within the country. This ties in with the Saudi government's priorities as laid out in Vision 2030, which notes that government will "strive to create suitable job opportunities for our citizens by supporting Small and Midsize Enterprise (SME) entrepreneurship, privatisation and investments in new industries".¹¹²

¹⁰⁹ Corporation, C. of L. (2021). *London named a world leader in Environmental, Social and Governance by global institutional investors*. [online] FE News. Available at: <https://www.fenews.co.uk/skills/london-named-a-world-leader-in-environmental-social-and-governance-by-global-institutional-investors/>.

¹¹⁰ Saudi Vision 2030 (2023). *Saudi Vision 2030*. [online] www.vision2030.gov.sa. Available at: <https://www.vision2030.gov.sa/en/>.

¹¹¹ Arab News. (2023). Saudi Arabia, UK discuss boosting educational partnership. [online] Available at: <https://www.arabnews.com/node/2420991/saudi-arabia> [Accessed 17 Mar. 2024].

¹¹² Saudi Vision 2030 (2023). *Saudi Vision 2030*. [online] www.vision2030.gov.sa. Available at: <https://www.vision2030.gov.sa/en/>.

Generally speaking, UK universities indicated that business is a popular choice for TNE programmes from the perspective of both students and universities, with one representative noting that “we know how to do it and we do it well”.

Technology

Vision 2030 recognizes the crucial role of digital infrastructure and enabling the growth of the IT sector. As part of this, Saudi authorities are continuing with plans to digitise and expand internet connectivity across the country and offer an increased range of digital services.¹¹³ The country has also secured significant investment in cloud computing in recent years. This rapid digital transformation is likely to result in a skills gap in the country.

Information and communication services were not listed as a job category in 2012 but represented 1.2% of the labour force in 2022. Employment in this sector was split almost equally between Saudis and foreign nationals, indicating that the country is importing almost half of its labour market needs in this area.

This tallies with the data on the number of Saudi students studying for Higher Education degrees overseas, where information and communication technologies were the fourth most popular topic by number of students.

In the research sector too, multiple Saudi university representatives noted that research on IT, big data and cybersecurity are key topics.

UK expertise in the information and communication sector was underlined during our discussion with UK universities, particularly in the area of cybersecurity.

Sports and recreation

Since the outset of Vision 2030's implementation, sports and recreation have become a significant focus for authorities in Saudi Arabia. The country has promoted itself as a destination for international sports tournaments and provided new sporting opportunities to the general public. Data indicates that weekly sporting participation rates rose by 37% between 2015 and 2019, with a 149% increase in female participation.¹¹⁴

At the university level, sports and sports management as well as tourism and hospitality are also supported by the Custodian of the Two Holy Mosques' External Scholarship Programme, which was first introduced in 2005 and was most recently renewed in 2019.¹¹⁵

Labour market data also indicates increased professional interest in the sector. The overall number of employees in the arts, entertainment and recreation sector remains minimal, accounting for 0.3% of employees in 2022. However, this category of employment did not exist ten years prior in 2012, indicating an increased interest in the segment by reporting authorities and a potential increase in the number of labour opportunities.

¹¹³ Saudi Vision 2030 (2023). *Saudi Vision 2030*. [online] www.vision2030.gov.sa. Available at: <https://www.vision2030.gov.sa/en/>.

¹¹⁴ Saudi Vision 2030 (2023). *Saudi Vision 2030*. [online] www.vision2030.gov.sa. Available at: <https://www.vision2030.gov.sa/en/>.

¹¹⁵ moe.gov.sa. (n.d.). وزارة التعليم | Scholarships. [online] Available at: <https://moe.gov.sa/en/education/highereducation/Pages/Scholarship.aspx>.
<https://opportunities-insight.britishcouncil.org/>

The fact that sector remains in its infancy represents an opportunity for UK institutions with expertise in sports research and development, professional development and technical capabilities.

Research and development

As explored in the discussion of [TNE drivers in Saudi Arabia](#), the country has placed a significant emphasis on research, development and innovation (RDI) in alignment with Vision 2030. Saudi Arabia's current RDI priorities encompass "health and wellness", "sustainable environment and supply of essential needs", "energy and industrial leadership" and "economies of the future".¹¹⁶ The UK and Saudi Arabia have also agreed to develop their Research and Innovation partnership, focusing on 'deep science' and 'deep tech', notably genomics and space, and to coordinate on the opportunities and challenges presented by AI.¹¹⁷

There is also public funding available in Saudi Arabia for research activities carried out in partnership with overseas universities. The RDIA has developed a system of research grants and a funding portfolio that is designed to boost the RDI ecosystem in the country and funding is also available for UK and Saudi universities working together via the British Council's UK-Saudi Challenge Fund.^{118 119}

Meanwhile, UK universities are globally recognised for their strength in research and development. This status is in large part founded on its high-quality research and innovation infrastructure, which includes large-scale physical research facilities and equipment, extensive



scientific archives and networks of technologies and digital infrastructures.¹²⁰

UK universities have experience of designing and developing high-quality laboratories, and in some cases have even worked with partners overseas to develop the local infrastructure required to deliver research courses.

Interviews with UK university TNE professionals also indicated that creating increased research ties and expanding opportunities in this area was a key driver of their interest in Saudi Arabia.

¹¹⁶ Saudi Arabia's Leap in Research and Development Excellence. (2023). Research, Development and Innovation Authority (RDIA).

¹¹⁷ gov.uk (2024). *The Kingdom of Saudi Arabia and United Kingdom Strategic Partnership Council: Economic and Social Pillar Joint Statement*. [online] Available at: <https://www.gov.uk/government/publications/united-kingdom-and-kingdom-of-saudi-arabia-strategic-partnership-council-economic-and-social-pillar-joint-statement--2/the-kingdom-of-saudi-arabia-and-united-kingdom-strategic-partnership-council-economic-and-social-pillar-joint-statement-html>

¹¹⁸ Rdia.gov.sa. (2023). *RDIA's Grants*. [online] Available at: <https://rdia.gov.sa/grants/> [Accessed 17 Mar. 2024].

¹¹⁹ saudiarabia.britishcouncil.org. (n.d.). *UK - Saudi Challenge Fund 2024 -Call is now open! | British Council Saudi Arabia*. [online] Available at: <https://saudiarabia.britishcouncil.org/en/programmes/education/UK-Saudi-Challenge>.

¹²⁰ www.ukri.org. (n.d.). *Creating world-class research and innovation infrastructure*. [online] Available at: <https://www.ukri.org/what-we-do/creating-world-class-research-and-innovation-infrastructure/>.

<https://opportunities-insight.britishcouncil.org/>

Institutional capacity building and staff training

Research into the main [drivers for TNE in Saudi Arabia](#) underlined the fact that increasing the supply and diversity of high-quality education is a theme that runs throughout Vision 2030, the new Executive Regulation governing the creation of branch campuses and our discussions with representatives of Saudi institutions.



“WE WANT TO DO MORE INTEGRATED MODELS. WE WANT TO UPSKILL AND CAPACITY BUILD. WE WANT TO ADD VALUE.”

UK university representative

Saudi Arabia is also looking to boost the country’s scientific and technical skills in response to demand from the labour market. In 2012, professional, scientific and technical professions were not categorised in official statistics. However, by 2022, this category accounted for 2.1% of the workforce. In addition, non-Saudi employees in this sector outnumber Saudi employees, indicating that there may not be enough locally trained talent to meet demand in this area.

On the other side of the equation, more than one UK university representative indicated during the course of this research that they are not interested in pursuing TNE models that require a simple commercial exchange of money for course materials. Instead, many UK universities are actively interested in creating partnerships that involve curriculum development and exchanges of experiences on the issues of Higher Education Institution (HEI) governance, management and processes, amongst other capacity building activities. Contributing to the professional development of local faculty staff was also cited as a desirable outcome of TNE partnerships.

Capacity building, professional development, curriculum development and teaching exchanges were also a dominant theme in our discussions with Saudi university representatives.

Challenges for UK-Saudi TNE

English language proficiency

Three UK universities reported that many students from Saudi Arabia do not currently have the level of English to successfully study on UK higher education programmes, including one who noted that the university has created a foundation programme specifically targeted at Saudi students who do not have the level of English language required to access the conventional foundation programme.

One university linked the issue of language to concerns around online and hybrid teaching. The representative suggested that it would like to provide more pre-sessional and foundation courses to Saudi students in order to bridge the language gap, but noted that “all pre-sessional and foundation courses in the UK are at least partially delivered online and online delivery is not funded in Saudi Arabia”.

One university reported that it had been asked by a potential TNE partner in Saudi Arabia to relax its IELTS score requirement and had struggled to convey that the language requirement exists as a “true and tested” guarantor of a student’s likelihood of being able to succeed on the course, rather than as a formalistic or bureaucratic barrier.


Nonetheless, one university reported that the level of English amongst Saudi students is “much, much better” than it was ten years ago, while another reported that while the level of English was not always “up to the mark”, the “quality of the academics is fantastic”.

On a related note, one UK university is currently engaged in delivering TNE in Saudi Arabia in Arabic language and explored some of the challenges this created. The interviewee noted that quality controlling a course delivered in Arabic was a significant challenge for the UK university and meant that the programme could only be limited to a small pilot programme.

Student readiness

One UK university interviewee suggested that the general level curriculum design and the quality of the teaching at secondary school level “isn’t enough to prepare students to get into the university”. The interviewee suggested that it may be necessary to “fund the gap” between school and university education.

Two of the university representatives we interviewed expressed the idea that it was important to trust the UK university’s course admission requirements because these are based on their experience of what students will need in order to successfully complete a course and cannot be softened for the purpose of setting up a TNE partnership.




“YOU NEED A CHAMPION WHO CAN NAVIGATE THE SYSTEM AND WHO HAS THE POWER WITHIN THE INSTITUTION TO PUSH THINGS THROUGH”

UK university representative

Contracts and organisational culture

Three universities reported that they experience a lack of understanding or clarity as to how partner institutions are organised or how decisions are made within partner institutions. They suggested that differences in organisational culture between UK and Saudi institutions can sometimes lead to misunderstandings that can result in a loss of trust that may stall a project.



“WE’RE ON A LEARNING JOURNEY AS TO WHAT THE MINISTRY WILL SUPPORT IN TERMS OF THE MODEL”

UK university representative

Two interviewees noted that they invest a lot of time and energy building relationships with counterparts, but when proposals are submitted to the broader partner institution they are not always approved and the reasons for the rejections are not always clear.

processes

In our discussions with UK universities, the overriding theme surrounding legislation and regulations was a lack of clarity on what is required. This held true even for those with extensive and direct experience of building TNE partnerships in Saudi Arabia. While this is true to a certain extent for universities operating in any new environment, multiple interviewees reported that they have more uncertainty about TNE legislation in Saudi Arabia than they do for other markets.

Legislation, regulations and

One interviewee speculated that he was not aware of whether any TNE is being conducted in Saudi Arabia while another thought that some kinds of agreements, such as franchise agreements, might not be permitted.

One participant also noted that there was a lack of case studies or information about successful collaborations, so it was difficult for other universities to assess what is working and what isn't.

Two universities noted that the chain of responsibilities for dealing with ministries and permitting procedures was not clear to them, meaning that universities had to switch back and forth between different ministries in order to move forward. Both mentioned the fact that this process was therefore time consuming and resource intensive, which may disincentivise TNE professionals from engaging with the country. It should be noted that one of the interviewees was discussing a personal experience while the other was reporting on perceptions he had gathered from UK TNE colleagues.

Another participant noted that the MOE sometimes appears to have a very clear idea of what a partnership should look like, which some UK universities may not be able to meet due to their own operating constraints.

These sentiments were echoed by the Saudi university representatives with whom we spoke. The participants expressed concern that delays in approvals at the level of the MOE caused delays in implementing partnerships and could even lead to partnerships being abandoned entirely. Three Saudi university interviewees suggested that they felt partnerships would be easier to set up if universities had a greater level of autonomy to bring them to fruition.

Quality mechanisms



As was the case for legislation and regulations, uncertainty was a prevalent theme in our discussions about quality mechanisms. Two universities suggested that they were not clear on what the quality control mechanisms and procedures are and which institutions have responsibility for ensuring they are implemented. One noted that universities are reluctant to dedicate resources to achieving accreditation if there is a high degree of uncertainty as to whether they will be able to obtain it.

UK institutions did not appear to express the view that they would be unable to comply with Saudi Arabia's accreditation requirements. Indeed, most appeared confident that their institution would be able to meet quality requirements and cited the UK's own track record on quality as an advantage. However, multiple representatives expressed the view that their lack of visibility on the quality requirements contributed to a sense of risk around any potential investment in time and resources.



“SOMETIMES WE’RE HESITANT TO APPROACH UNIVERSITIES FOR PARTNERSHIPS BECAUSE WE KNOW THAT THEY’LL BE PUT OFF BY THE PROCESS”

Saudi university representative



“AS TNE PROFESSIONALS WE UNDERSTAND THAT THINGS ARE CHANGING. BUT IT HASN'T GOT ACROSS TO THE REST OF THE UNIVERSITY YET”

UK university representative

Faculty perceptions of working in Saudi Arabia

In general, academic staff perceptions, lifestyle factors, and considerations of equity in overseas opportunities were reported as factors that significantly shape universities' readiness to engage in TNE in specific countries.

A total of five UK university representatives

raised questions relating to civil liberties, freedom of speech and the equality of opportunities when discussing TNE in Saudi Arabia, with the majority doing so unprompted. The concerns were of both a practical and theoretical nature.

Universities were unsure whether all faculty members would be willing and able to deliver in-person teaching in Saudi Arabia. They noted that it was important for all travelling staff members to have access to the same professional TNE opportunities and to enjoy the same access to leisure facilities and a good quality of life while working overseas. They also shared concerns about whether academics would feel able to deliver exactly the same content in exactly the same way as they would in the UK. Some interviewees felt that the university would need guarantees to safeguard UK academics while teaching in Saudi Arabia.


As things stand, multiple universities reported that it can be “challenging to get the university to engage with Saudi Arabia” and that some academic staff are resistant to the idea of teaching there. One university suggested that it might be subject to negative media coverage in the UK if it were to engage openly with Saudi Arabia.

Two interviewees suggested that concerns of this nature are “outdated” or do not reflect the situation on the ground but confirmed that this was not always the majority view within universities as a whole.

UK visa requirements

While UK visa requirements may not immediately appear to have their place in a discussion about TNE, which is by its nature designed to be delivered outside of the UK, three university representatives raised the issue of UK visa requirements without prompting during their interviews. All three participants expressed the view that you cannot entirely decouple the issue of overseas student recruitment from TNE or promote one at the expense of the other.


As a result, the perception of an increasingly stringent immigration environment and an increase in visa rejections for Saudi students travelling to the UK (and their families) was underlined as a potential obstacle to building increased TNE links.



“IT'S SYNERGISTIC INTERNATIONAL COOPERATION. YOU CAN'T JUST HAVE TNE. IT'S PART OF A WHOLE ECOSYSTEM”

UK university representative

One interviewee noted that some university departments would like to create TNE models that involve programme delivery in-country alongside some delivery in the UK, citing the example of chemistry, where students could be invited to visit the laboratories and research facilities of UK universities for short periods of time. Another noted that a successful TNE master's student might go on to complete a PhD in the UK. Meanwhile, the postgraduate diploma in Museum Studies that is due to be launched in April 2024 by Effat University and SOAS includes compulsory travel to the UK from Saudi Arabia.¹²¹



“WHEN WE TALK ABOUT WORKING TOGETHER TO APPLY FOR PUBLIC FUNDING, THEY LOSE INTEREST ”

Saudi university representative

University representatives also suggested that negative interactions with the UK's immigration system could contribute to a negative perception of the UK overall for Saudi students, which may extend to its position as a TNE provider.

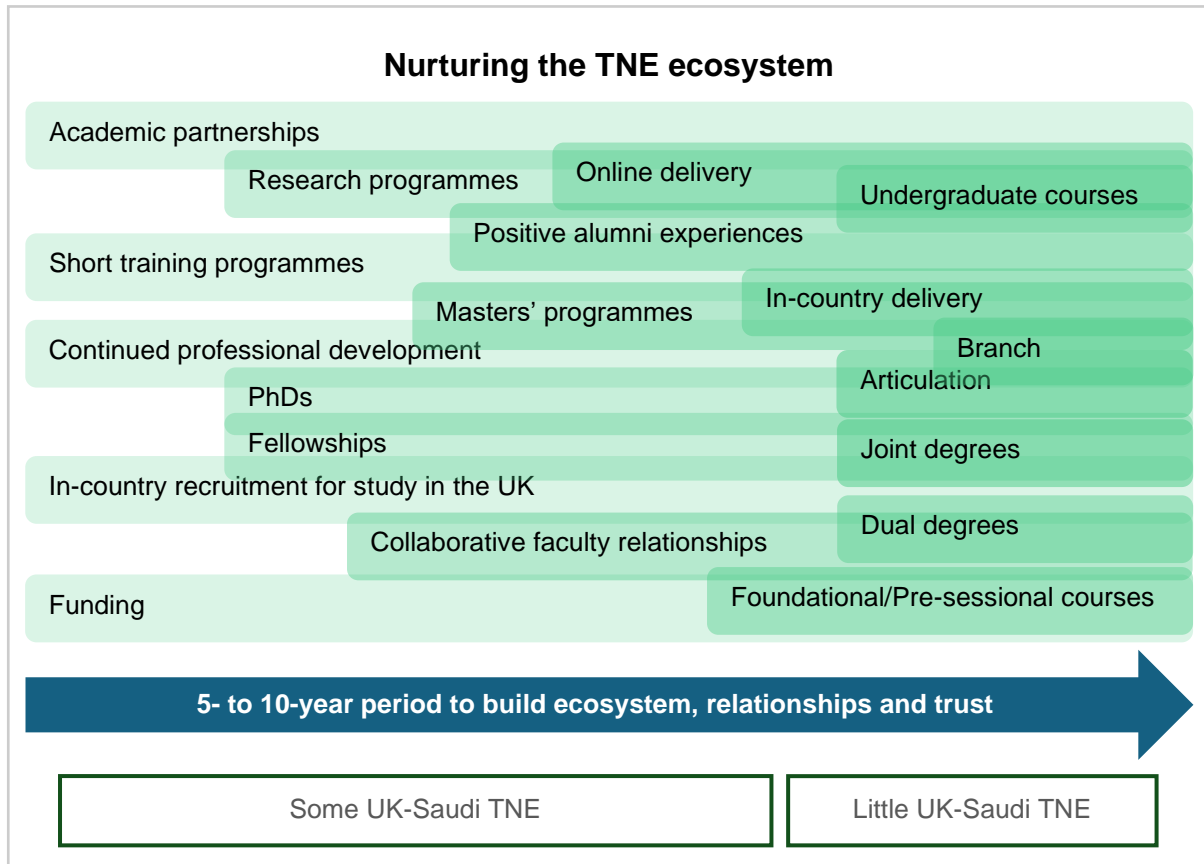
Types of funding for research

collaboration

The Saudi university representatives that participated in this study noted that their UK counterparts often expected the funding for research collaboration to be provided by the Saudi partner. Two Saudi university representatives noted that they were open to collaborating with UK universities to design bids for publicly available funding, but reported a reticence to engage in this process from UK universities.

¹²¹ www.soas.ac.uk. (2024). *Sponsored by the Saudi Museums Commission: SOAS-Effat University Joint Postgraduate Diploma in Museum Studies | SOAS*. [online] Available at: <https://www.soas.ac.uk/study/find-course/sponsored-saudi-museums-commission-soas-effat-university-joint-postgraduate> [Accessed 17 Mar. 2024]. <https://opportunities-insight.britishcouncil.org/>

Conclusions and recommendations



Source: Itri Insights, from discussions with academic institutions

In discussions with UK and Saudi university TNE representatives, a picture emerged of a complex TNE landscape that is generally built over a period of several years, if not decades, and leads to the creation of an increasingly dense network of ties. Typically, collaborations begin with research partnerships and short programmes and, if the initial collaborations are successful, are built via fruitful individual relationships and positive outcomes into increasingly more durable, formal and ambitious partnerships. The importance of multiplying the forums for collaboration via seminars, exchange programmes and interest groups was underlined by both Saudi and UK interviewees.

This research suggests that there are some notable success stories for UK-Saudi TNE, primarily King Saud University's (KSU) External Joint Supervision Programme (EJSP) and the Open University-Arab Open University partnership. However, neither of these models are replicable across the broader university landscape in the current context. KSU's TNE success appears to rely heavily on its ability to implement programmes without the approval of the MOE, which is not the case for the vast majority of Saudi Universities. The Open University, meanwhile, operates via a distance learning model that is not reflective of the approach of most UK universities.

Most UK-Saudi TNE ties beyond these two examples are currently in the early stages of this relationship, involving CPD programmes and professional training programmes, with some small-scale dual and joint degrees, primarily at post-graduate level. However, both attitudes to TNE and the legislative environment in Saudi Arabia are changing, which has the potential to create opportunities for increased TNE delivery in the future.

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To encourage the increased emergence of UK-Saudi TNE linkages, it is key that all stakeholders in the equation, from government decision-makers to TNE professionals and academic staff, understand the importance of this ecosystem and contribute to its construction.

Recommendations for Saudi decision-makers

- **Clarify what can and can't be done:** Representatives of UK universities continue to report high levels of uncertainty with regard to many elements of TNE provision in Saudi Arabia. Providing clarity on these points may reduce the hesitancy of some universities to invest time and resources in developing TNE programmes. During our research, the following questions were raised by UK university representatives:
 - **Partnerships**
 - Are all modes of TNE collaboration permitted? What are the rules around franchised courses?
 - Is there a list of standardised terminology for creating TNE partnerships?
 - Are all kinds of partnership and delivery funded?
 - What is the legal status of online and hybrid learning?
 - What are the pathways for implementing TNE partnerships besides branch campuses?
 - **Partners**
 - Are there any partners that UK universities may not work with?
 - **Research**
 - Is there a list of permitted areas of research?
 - Are any areas of research off limits for overseas institutions?
 - Who can UK institutions work with on research projects?
- **Develop standardised pathways:** Clear progress has been made on the pathway for creating branch campuses in Saudi Arabia. However, it may be productive to develop standardised pathways and collaboration models for other forms of TNE, where uncertainty still remains. UK universities would benefit from straightforward, step-by-step guides that set out the legal obligations, definitions and terminology, timeframes and quality mechanisms for dual and joint awards, validation agreements, franchised programmes, articulation agreements and progression agreements, amongst other forms of collaboration.
- **Publicise the changes that are underway:** Some UK university representatives have a clear understanding of the changes that are currently underway in Saudi Arabia. However, many do not, and some have been left with perceptions that may be out of step with the way things currently are. In addition, TNE professionals reported that the academic staff tasked with delivering TNE programmes may have even less exposure to the reality of life in Saudi Arabia.
- **Fund the development of TNE programmes:** UK universities noted that there is competition for resources when developing new TNE programmes in collaboration with local partners and reported that some countries have already dedicated substantial budgets to funding these activities. Removing or lessening the financial burden associated with developing TNE collaborations, via grants could constitute one way of promoting Saudi Arabia as a TNE destination.

Recommendations for UK decision-makers

- **Take a unified approach:** Our research suggests that the UK's TNE professionals sometimes feel that they are working at odds with broader policies relating to visa

authorisations and immigration, noting that TNE cannot easily be viewed as vehicle to increase the UK's education exports without impacting, and being impacted by, many other areas of international engagement. Without a unified approach that encourages widespread international integration, efforts to increase UK TNE in Saudi Arabia could be dampened.

Recommendations for Saudi universities

- **Find the right partner:** The UK university representatives interviewed as part of this research expressed a wide range of opinions, preferences and capabilities with regard to TNE partnerships. Not all UK universities may be a good fit for every Saudi institution in terms of organisational culture and approach. However, there is enough variation between institutions to suggest that Saudi universities may find highly motivated and well-suited UK partners for potential TNE collaboration. Some UK universities are working within relatively rigid frameworks and will require flexible Saudi partners who can fit into these structures. Others have more flexibility and may be able to slot into existing Saudi frameworks more easily.
- **Designate a partnership champion:** Saudi Arabia remains a relatively new market for many UK universities who may be unsure of the workings of Saudi universities and/or apprehensive about the broader legal and regulatory environment. Partnership champions may develop ways of explaining internal university approvals processes to UK universities, as well as directing them to the correct points of contact at relevant government partners. By appointing a designated partnership champion who is tasked with helping UK universities to navigate this environment, Saudi universities can improve the chances that a proposed TNE partnership will actually come to fruition and help to build trust in the process of partnership creation.
- **Seize the opportunity:** Some UK universities do not have a well-defined strategy targeting specific areas of the world or specific universities for TNE. Others describe their strategies as being “in transition”. This provides an opportunity for Saudi partners to place themselves in the front and centre of UK TNE conversations by being proactive and present and by actively identifying areas of potential convergence in research and course provision.

Recommendations for UK universities

- **Leverage relationships:** The importance of building positive relationships and creating trust was emphasised frequently in the course of this research, particularly by UK universities who are already successfully engaging in TNE partnerships in Saudi Arabia in various forms. UK universities should recognise the importance of leveraging these relationships wherever they emerge, whether within specialised partnerships teams, amongst research staff and faculty or through alumni.
- **Understand the landscape:** Our discussions with UK university representatives indicated that the TNE landscape and operating environment in Saudi Arabia were often not well understood. Where there were gaps in knowledge, TNE professionals often assumed that this was because the information does not exist or is not easily accessible. While this sometimes proved to be the case, there were instances in which some of these gaps in knowledge could have been closed with relative ease. As well as relying on their own research skills, UK universities can utilise the knowledge and assistance of organisations such as the British Council to better understand the TNE landscape in Saudi Arabia.
- **Utilise the resources available:** The challenge of funding the process of setting up a TNE partnership was underlined by multiple UK TNE professionals. As part of the British Council's Going Global Partnerships programme, the UK-Saudi Challenge Fund offers grants for UK and Saudi institutions to support research collaboration, internationalisation

and transnational education. In 2024, grants of between 20,000 GBP and 40,000 GBP were available for UK universities applying individually or as part of a consortium, to partner with universities or consortia from Saudi Arabia. UK universities may utilise this funding to reduce the financial impact of the efforts required to set up TNE agreements.

- **Challenge long-standing assumptions:** Saudi Arabia is undergoing a period of significant change in terms of its educational systems but also with regard to its economy and society as a whole. The practical application of new laws and regulations in the country are at various stages of implementation. However, any knowledge or experience gathered prior to the last five years may now be out of date. As such, both TNE professionals and faculty may benefit from refreshing their understanding of Saudi Arabia, as well as its educational landscape. This process may be aided by encouraging more cultural exchange with, and travel to, Saudi Arabia.
- **Start now:** Saudi Arabia is actively working to attract international expertise in its education sector and universities from other countries are already moving into this space. The UK trails the US in terms of the number of academic partnerships with Saudi universities, while universities in Australia and the US have already signalled their intentions to set up branch campuses in the country. As such, the UK may be missing out on TNE opportunities to those who have already built established relationships in the country. UK universities should start engaging with Saudi Arabia in the near future to avoid being left behind.

Appendices

Models of collaboration terminology

The following list of models is not exhaustive or definitive but served as a guide for standardising the use of terminology during the preparation of this research.

- **International Branch Campus (IBC):** A form of international higher education whereby one or more institutions establishes a physical presence in a foreign location to deliver its programmes.
- **Dual award:** A programme of study jointly delivered by a local institution and an overseas university leading to the granting of both a overseas university award and that of the local institution.
- **Joint award:** A programme developed jointly with a overseas university and at least one local institution, which may also have degree awarding powers, leading to an overseas university award, or a degree awarded jointly by both institutions.
- **Franchised programme:** Existing (or sometimes, modified versions of existing) overseas university programmes that have been approved for delivery on campus in country, and that may also be approved for delivery by an external partner.
- **Validated programme:** New programmes devised and developed by a local partner (or jointly with an overseas university) using the overseas university's protocols, which are then approved by the overseas university for delivery by the local partner as an overseas university award.
- **Externally validated programme:** Programmes devised and developed by a local partner to its own specifications and approved by the overseas university as equivalent to an overseas university award.
- **Articulation agreement:** A formal link between the overseas university and a local partner, providing a guarantee that a cohort of students who achieve an agreed standard in a programme at the local university will be able to progress to a particular stage of an award-bearing programme in the overseas university, provided there is a close curriculum 'fit' for articulation purposes.
- **Progression agreement:** The overseas university recognises progression from a programme a student has completed at a local institution, either to the beginning or to a more advanced stage of an award-bearing programme in the overseas university.
- **Online or distance learning:** The overseas university delivers its courses or programmes entirely or partially online to students in country. The local institution is responsible for the curriculum, assessment and quality assurance and awards the qualifications.
- **Flying (or fly-in) faculty:** Academics from overseas 'fly in' to teach students in country in short, intensive blocks of less than a month before they 'fly out' to resume normal duties.

Further details of accreditation standards

Please see below for more details of the NCAAA's accreditation standards.

Institutional accreditation

According to the NCAAA's 2022 Institution accreditation standards, there are eight main areas on which institutions are assessed:

1. **Vision, mission and strategic planning:** The institution must have a clear strategic plan, aligned with national trends, that directs planning, decision-making and work in all academic and administrative units. Institutional performance must be monitored and assessed based on key performance indicators.
2. **Governance, leadership, and management:** The institution must have governance systems that ensure its effectiveness and efficiency; and must implement policies, regulations and procedures that support its mission, goals, and strategic and operational plans. The institution must have a clear and functioning organisational structure with defined lines of authority and responsibility for all jobs. The institution must have a leadership style and an administrative system that is based on planning, implementing, reviewing, and improving with follow-up; and must apply quality systems that achieve continuous performance development in a framework of integrity, transparency, equality and fairness in a supportive institutional environment.
3. **Teaching and learning:** The institution must have clear and effective policies and procedures to design, approve and assess academic programs and courses. The planning of programmes must contribute to achieving the institution's mission and goals. The institution must define the characteristics of graduates at the institution level and the learning outcomes at programme level that are in line with its mission and the National Qualification Framework (NQF). The institution must have an effective system that ensures high standards of teaching and learning in all programmes offered; and that the quality of teaching and learning is regularly monitored through appropriate mechanisms and periodically reviewed for further development.
4. **Students:** Policies and regulations governing student admission must be clear, fair and published widely. The institution must have an effective electronic system to manage and secure students' records. The rights and duties of students must be specified, published, and adhered to. The institution must establish rules of good conduct and procedures for disciplinary, grievance and appeals that are transparent and fair. The institution must provide effective mechanisms for guidance and counselling, and provide all the services needed by students equally, taking in consideration people with disabilities. The institution must have an effective policy to benefit from the opinions of graduates, in addition to adopting programs for taking care of international students, if any, and their needs.
5. **Faculty and staff:** The institution must have a sufficient number of teaching staff and employees with the appropriate qualifications and expertise to carry out their responsibilities properly and must provide them with the necessary support and appropriate professional development programmes. The institution must assess their performance periodically and use the results for improvement.
6. **Institutional resources:** The institution must have the adequate financial resources, and the physical and technical infrastructure to support its activities and operations at all its main campuses and branches. These resources must be managed in an efficient manner and comply with the rules and regulations. The institution must verify, through periodic evaluation processes, that its resources are adequate to ensure the quality of its educational programs and support continuous improvement; and that it has an effective system for safety and risk management.

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7. **Research and innovation:** The institution must have specific plans for research and innovation activities that reflect its strategic directions and conform to its scope and mission and provide the necessary resources to these activities. It must provide appropriate support for faculty, students and staff to carry out their role in these activities. The institution must monitor and document its research and innovation activities, prepare periodic reports and take the necessary actions for improvement and development.
 8. **Community partnership:** The institution must have specific plans and mechanisms for community partnership that reflect its strategic directions, conform to its nature and mission, and support the effective participation of its teaching staff, students and employee. The institution must establish effective cooperative relations with the local and international community, professional bodies, and the various sectors of the labour market. The institution must document its activities, follow up the effectiveness of community partnership, and improve and develop it.

Each standard is further broken down into sub-sections detailing the specific criteria that must be met.¹²²

Programme accreditation

Programme accreditation is a certification granted to the education institution by NCAAA, proving that the education and scientific research activities carried out by the institution meet the minimum requirements of quality standards.

According to the NCAAA's 2022 Programme accreditation standards, there are five main areas on which programmes are assessed:

1. **Programme management and quality assurance:** The programme must have effective leadership that implements the institutional systems, policies and regulations. The programme leadership must plan, implement, monitor and activate quality assurance systems that achieve continuous development of programme performance in a framework of integrity, transparency, fairness and within a supportive organisational climate.
2. **Teaching and learning:** Learning outcomes at the programme level must be precisely defined, consistent with the requirements of the NQF and with the related specialised academic standards and labour market requirements. The curriculum must conform to professional requirements. Teaching staff must implement diverse and effective teaching and learning strategies and assessment methods that are appropriate to the different learning outcomes. The extent of achievement of learning outcomes must be assessed through a variety of means and the results used for continuous improvement.
3. **Students:** The criteria and requirements for student admissions to the programme must be clear and publicly disclosed and must be applied fairly. The information about the programme and the requirements for completing study must be available and students must be informed about their rights and duties. The programme must provide effective guidance and counselling services and extracurricular and enriching activities to its students. The programme must evaluate the quality of all services and activities offered to its students and improve them. The programme must follow up on its graduates.
4. **Faculty:** The programme must have sufficient numbers of qualified teaching staff with the necessary competence and experience to carry out their responsibilities. The teaching staff

¹²² Institution Accreditation Standards. (2022). [online] NCAAA . Available at: <https://dqd.ksu.edu.sa/sites/dqd.ksu.edu.sa/files/users/user196/%D9%88%D8%AB%D8%A7%D8%A6%D9%82%20%D8%A7%D9%84%D9%87%D9%8A%D8%A6%D8%A9%20%D8%A7%D9%86%D8%AC%D9%84%D9%8A%D8%B2%D9%8A/NCAAA%20Standards%20and%20Templates/2022%20NCAAA%20December%202022/NCAAA%202022%20Standards/NCAAA%202022%20Institution%20Accreditation%20Standards.pdf>.

must be aware of current academic and professional developments in their fields of specialisation, participate in research and community service and in improving the programme and institutional performance. Teaching staff performance must be evaluated according to specific criteria and the results of these evaluations must be used for development.

5. **Learning resources, facilities and equipment:** Learning resources, facilities, and equipment must be adequate to meet the needs of the programme and its courses; and must be available to all beneficiaries using an appropriate arrangement. Teaching staff and students must participate in identifying such resources based on their needs, and in assessing their effectiveness.

Each standard is further broken down into sub-sections detailing the specific criteria that must be met. A separate set of standards is applicable to post-graduate programmes of study, with a section dedicated to research and projects.¹²³

¹²³ Program Accreditation Standards. (2022). [online] NCAAA . Available at: <https://dqd.ksu.edu.sa/sites/dqd.ksu.edu.sa/files/users/user196/%D9%88%D8%AB%D8%A7%D8%A6%D9%82%20%D8%A7%D9%84%D9%87%D9%8A%D8%A6%D8%A9%20%D8%A7%D9%86%D8%AC%D9%84%D9%8A%D8%B2%D9%8A/NCAAA%20Standards%20and%20Templates/2022%20NCAAA%20December%202022/NCAAA%202022%20Stanards/NCAAA%202022%20Program%20Accreditation%20Standards.pdf>.
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List of UK-Saudi university collaborations

Based on a survey of information published by Saudi universities.

Partner	Saudi University
Imperial College	Imam Abdulrahman Bin Faisal University
International House London	Princess Norah bint Abdulrahman University
Loughborough University	Imam Abdulrahman Bin Faisal University
Open University	Arab Open University
Queen's University Belfast	Princess Norah bint Abdulrahman University
Queen's University Belfast	Alfaisal University
Royal National College of the Blind	Prince Mohammad University
University of Birmingham	King Saud University
University of Dundee	Princess Norah bint Abdulrahman University
University of Edinburgh	King Saud University
University of Essex	Princess Norah bint Abdulrahman University
University of Exeter	Princess Norah bint Abdulrahman University
University of Exeter	Imam Muhammad ibn Saud Islamic University
University of Glasgow	Princess Norah bint Abdulrahman University
University of Leeds	King Abdullah University of Science and Technology
University of Leeds	Prince Mohammad University
University of Liverpool	King Saud University
University of Manchester	King Saud University
University of Newcastle	Princess Norah bint Abdulrahman University
University of Nottingham	King Saud University
University of Strathclyde	Princess Norah bint Abdulrahman University
University of Strathclyde	Imam Muhammad ibn Saud Islamic University
University of Swansea	King Saud University
University of Swansea	Princess Norah bint Abdulrahman University

Source: Itri Insights

Glossary

CUA	Council of University Affairs
ESG	Environment, Social and Governance
ETEC	Education and Training Evaluation Commission
GBP	Pound sterling
HE	Higher Education
HEI	Higher Education Institution
HESA	Higher Education Statistics Agency
IBC	International Branch Campus
IELTS	International English Language Testing System
KAUST	King Abdullah University of Science and Technology
KFUPM	King Fahd University of Petroleum and Minerals
LOU	Law of Universities, 2019
MISA	Ministry of Investment
MOCI	Ministry of Commerce
MOE	Ministry of Education
MOFA	Ministry of Foreign Affairs
MOHE	Ministry of Higher Education (dissolved)
MOU	Memorandum of Understanding
NCAAA	National Commission for Academic Accreditation and Assessment
NQF	National Qualification Framework
QAA	UK's Quality Assurance Agency for Higher Education
RDI	Research, Development and Innovation
RDIA	Research, Development and Innovation Authority
SAR	Saudi Riyals
SME	Small and Midsize Enterprise
TNE	Transnational Education
UNESCO	United Nations Educational, Scientific and Cultural Organisation

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