



Universities UK
International

STATE OF THE RELATIONSHIP
UK HIGHER EDUCATION
ENGAGEMENT WITH THE
COOPERATION COUNCIL
FOR THE ARAB STATES
OF THE GULF



Education
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ACKNOWLEDGEMENTS

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1. REPORT OVERVIEW

BACKGROUND TO THE RESEARCH

This report aims to provide an overview of the present state of UK-Gulf relationships in higher education, research and innovation. The study focuses on the six countries of the Cooperation Council for the Arab States of the Gulf (GCC):

- Bahrain
- Kuwait
- Oman
- Qatar
- Saudi Arabia
- The United Arab Emirates

In some instances, selected Middle East and North African countries are included in statistical comparisons to give a broader context to the study's findings.

The research draws on data sourced through the United Nations Educational, Scientific and Cultural Organization (UNESCO) Institute for Statistics (UIS), the Higher Education Statistics Agency (HESA), and SciVal. Additional data was sourced through an online survey of UK universities administered by UUKi, mapping UK institutions' GCC activities and partners, which received 63 responses. A detailed research methodology for the report can be found on page 46.

STRUCTURE OF THE REPORT

Following the executive summary and overview of the results of a UUKi sector survey, the report opens with a statistical analysis of key higher education indicators relevant to the GCC countries. Drawing on the aforementioned survey data, UK HEIs' priorities and strategy for the GCC region are considered. An attempt is made to capture the success factors for UK institutions which have increased international student enrolments from the GCC, following which the relationship between GCC student enrolments in the UK and TNE delivered in the region is examined. Finally, international research cooperation in the GCC countries is explored to situate the UK-GCC relationship in its wider international context. The study concludes with a summary of enablers and challenges for future UK-GCC collaboration.

1.1 EXECUTIVE SUMMARY

State of the relationship: UK higher education engagement with the Cooperation Council for the Arab States of the Gulf is the second in an ongoing series produced by Universities UK International (UUKi), mapping the links between UK higher education institutions (HEIs) and specific countries or world regions.

The study is released at a time when UK Government is increasing support for UK-GCC relationships in higher education, research and innovation, notably via Gulf Science, Innovation and Knowledge Economy Programme (GSIKE). This is a multi-year, multi-million pound programme running 2016-2020 which will promote UK-GCC collaboration in science, innovation and higher education engagement. Among other activities, the programme will provide training for over 300 GCC researchers, support joint UK-GCC symposia, and fund collaborative research projects between UK and GCC universities and research institutes.

This report presents an overview of the relationships between UK universities and the countries of the GCC. The findings are based on a statistical analysis of the available secondary data, and a comprehensive review of primary data obtained through a survey of UK institutions carried out by UUKi.

UK universities' links with the GCC countries are found to span a wide range of activities: international student enrolments; research collaboration; transnational education partnerships; continuous professional development; executive education; and consultancy with business and industry. The report also identifies significant complementarity between the long-term priorities of UK universities active in the GCC, and the objectives outlined in the GCC states' respective long-term national economic strategies, in which the strengthening of higher education and research systems consistently figures as a central objective.

Respondents to the UUKi sector survey suggested that the challenges they perceived as most prominent regarding their work with the GCC countries are the use of rankings-based 'approved' university lists by GCC regional agencies, and UK student visa requirements. The respondents also suggested that the most significant 'enabler' to continued successful collaboration with the GCC region was the projection of the UK as a welcoming destination for GCC international students and academics.

The UK has long been a popular destination for international students from the GCC, with student enrolment constituting an important strand of UK universities' activities in the region. While this will remain significant, this report highlights a possible shift in focus as UK institutions increasingly seek out transnational education (TNE) partnerships and joint research opportunities as priorities for GCC engagement.

GCC STUDENT ENROLMENTS IN UK HIGHER EDUCATION

While natural resources represent an important source of revenue for most GCC states, there is a strong emphasis in national development strategies on economic diversification. Education is a key pillar within each of these strategies and receives concerted government support.

In order to align towards the achievement of strategic goals, over recent years there have been indications of some change in the nature of education spending by GCC governments.

The range of UK universities able to host state-sponsored students from the GCC may be limited by the use of rankings-based eligibility lists by regional funders to identify 'approved' overseas institutions. Approved university lists and methodologies may or may not be published for consultation; and while most lists draw on global league tables (for example, Times Higher Education, SHJT, QS) to guide inclusion or exclusion, some agencies also apply a bespoke formula to identify and define approved universities.

Given the importance of state support as a source of funding – scholarships support more than half of postgraduates from Saudi Arabia, and over half of undergraduates from Kuwait and Oman – changes in eligibility criteria can significantly affect institutional enrolments from year to year.

With the exception of students from Saudi Arabia, the majority of GCC students enrolled on programmes in the UK are undergraduates. The use of education agents, participation in student fairs, and engagement with local government agencies are the channels most commonly used by UK institutions to support student recruitment in the GCC, while engagement with local schools is the channel identified by UK HEIs as having provided the largest source of growth in student numbers to the UK.

TRANSNATIONAL EDUCATION IN THE GCC

Transnational education (TNE), defined here as the provision of education to students based in a different country from that in which the provider is located¹, is highly developed in the GCC states, which have among the highest levels of TNE enrolments of any region worldwide. UK TNE activity is particularly concentrated in Oman and the UAE. 88% of all Omani students registered on UK programmes, and 78% of UAE students registered on UK programmes, complete at least some portion of study towards their UK qualification in their home country².

Almost a third of UK institutions (32%) active in the GCC region use their TNE arrangements as a direct pathway for student recruitment to the UK. The provision of foundation and undergraduate degrees is central in establishing these pathways. Almost a third of the UK HEIs surveyed (32%) plan to expand their foundation programmes and franchise arrangements in the GCC in future.

Some GCC states, notably the UAE and Qatar, now serve as regional education hubs. Others, including Bahrain, have declared aspirations to fulfil a similar role in future. Secondary data analysis demonstrates that TNE delivered in these locations caters as much for non-national resident and international demand as it does for resident nationals. For example, the UAE is increasingly popular with wider MENA region students from outside the GCC (particularly Egypt, Jordan and Iraq) as well as students from South East Asia, and parts of Sub-Saharan Africa³.

Beyond the direct benefits to students studying for a UK qualification in the GCC, UK TNE has boosted the capacity of GCC higher education systems to absorb growing domestic and regional demand for quality higher education, and to respond to changes in national and regional demographics. When considering future development of TNE in the GCC states, UK HEIs will

benefit from aligning provision to declared national developmental priorities, or to known skills gaps.

Opportunities for UK TNE engagement in the GCC are likely to continue to grow. Where quality local provision is comparatively underdeveloped – particularly in priority subject areas or at postgraduate level, UK-led TNE partnerships may be presented as conferring significant benefits to the host country in helping to meet demand.

UK-GCC RESEARCH COLLABORATION IN CONTEXT

In GCC national economic strategies (for example, *UAE Vision 2021*), increasing investment in research and innovation is consistently highlighted as a policy priority. Although overall research output across the GCC remains relatively low, a majority of research is carried out in collaboration with international co-authors, and intensity of collaboration within the region is expected to grow. Many GCC states, such as Saudi Arabia and the UAE, have committed to increasing research and development (R&D) spend as part of national strategies to diversify their economies.

There is a positive correlation across the GCC states between levels of international co-authorship and collaboration, and total research output. While the US is by far the GCC's most important overseas research partner, the UK ranks among the top five for research collaboration in all GCC states. This strong position is likely to be consolidated and strengthened as recent investments by UK Government, including multi-year funding for UK-GCC collaborative research, develop and mature.

Engineering and physical sciences are the most popular disciplines across all GCC countries, however beyond this there is significant country variation. In Saudi Arabia medical research is the second most popular field; in Qatar and Oman the arts and humanities; and in the UAE economic and social research. UK universities note industry engagement, joint research (particularly in education), and teacher training as areas they are keen to develop further in future⁴.

UUKi survey data further indicates that those GCC countries in which UK HEIs have had greatest success in securing local research funding are Saudi Arabia and Qatar. Engineering and physical sciences, followed by medical research, biotechnology and biological sciences, are the subject areas in which UK universities have attracted the highest levels of local research funding.

GCC NATIONAL ECONOMIC PLANS

This report highlights the GCC countries' respective national economic plans as a valuable resource for UK institutions seeking to align their institutional strategy with regional governments' objectives. With the exception of Kuwait's Vision 2035 strategy, English language versions of these documents are made available for ease of reference as follows:

- UAE Vision 2021
- Saudi Vision 2030
- Qatar National Vision 2030
- Economic Vision 2030 Bahrain
- Oman Vision 2040
- Kuwait Vision 2035

1.2 KEY FINDINGS FROM THE UUKi SECTOR SURVEY

A UUKi survey of UK HEIs active in the GCC was undertaken in December 2016, receiving 63 responses. Key findings are summarised below.

UK HEIs' ACTIVITIES AND ENGAGEMENT WITH THE GCC

UK HEIs maintain close relationships with GCC funding agencies in a range of areas, with the main strategic driver of this engagement being student recruitment. As observed in the report, across the GCC there is substantial government funding available to support students seeking to pursue their studies overseas. More than half of students enrolled in UK programmes from Saudi Arabia, Kuwait and Oman are government-funded. International students from GCC countries, with the important exception of students from Saudi Arabia, primarily study on undergraduate programmes in the UK.

Survey responses highlight that working with local schools has provided the most effective channel for enrolment growth. The exception is Saudi Arabia, where engagement with local funding agencies is identified as the most effective route. Overall, education agents, fairs, exhibitions and engagement with local government agencies are the most common GCC recruitment channels used by UK HEIs.

The GCC countries most frequently visited by UK vice-chancellors, pro-vice-chancellors and other members of the senior leadership team are the UAE and Oman. This may be explained by the intensity of UK TNE – measured by the number of TNE students registered on UK programmes – and other partnership initiatives in these countries, and hence their strategic importance for UK institutions.

UK TRANSNATIONAL EDUCATION (TNE) IN THE GCC

TNE is highly developed in the GCC, with some countries having acquired the status of education hubs (Qatar and the UAE) or signalling hub ambitions (Bahrain). TNE and GCC partnership development feature prominently as activities for a majority of UK HEIs active in the UAE and Oman. TNE and collaborative research are the two areas which UK institutions appear to be prioritising in their longer-term GCC strategy.

A striking finding is that a majority of TNE students in the UAE are South Asian nationals (India, Pakistan, Sri Lanka and Bangladesh), followed by local students, then by students from other GCC countries, and from the wider MENA region. This suggests that UK HEIs' target audience for TNE in the UAE is highly international, with implications for marketing, communication and engagement strategy.

THE RELATIONSHIP BETWEEN UK TNE IN THE GCC AND UK ENROLMENTS

Almost a third (32%) of UK institutions active in the GCC use their TNE provision for student recruitment to the UK. The same proportion of HEIs plan to expand their TNE provision to include study modules delivered in the UK. Half of the institutions planning to expand their TNE intend to expand double and joint programmes, while just under a third plan to increase the number of foundation programmes delivered in the GCC. Anecdotal data captured in survey comments and follow-up interviews suggests that locally-delivered foundation programmes contribute to UK undergraduate enrolments. Similarly, it was reported that local delivery of pre-masters and undergraduate top-up degrees lead on to UK postgraduate taught programmes.

Finally, respondents highlighted the advantages of a regional (rather than country-specific) approach to TNE development in the GCC and surrounding countries, noting increasing intra-regional student mobility, and reflecting this in UK HEI staffing and operational configurations with a view to achieving economies of scale.

2. GLOBALLY MOBILE STUDENTS FROM THE GCC AND WIDER REGION

This section examines demand for higher education across the GCC and surrounding region, including an analysis of the major international study destinations for GCC students studying overseas.

2.1 DEMAND FOR INTERNATIONAL EDUCATION IN THE GCC AND WIDER REGION

Of the six GCC states, Saudi Arabia currently sends the largest total number of students to the UK, the majority of which are enrolled on postgraduate programmes. From 2011–12 onwards, the number of Saudi Arabian students in the UK has declined – in contrast with continuing growth to other major study destinations such as the US and Australia. While postgraduate enrolments to the UK have since showed some recovery, they remain below 2010–11 levels. Engagement with funding agencies continues to be the most productive channel for UK HEIs engaged in student recruitment from Saudi Arabia⁵.

Table 1 shows higher education indicators for the GCC states and for selected countries from the surrounding MENA region. The countries in the table are ranked by the number of students enrolled in tertiary level education overseas. While the highest number of students in the UK come from Saudi Arabia, the UK's global market share is relatively low at 12.7%. UK global market share is strongest in the UAE (36%), Qatar (29%) and Bahrain (27%).

Qatar, Bahrain, Oman and Kuwait have the highest outbound mobility ratios⁶ of the selected countries, and comparatively low gross tertiary education enrolment ratios. This suggests that a lack of adequate domestic higher education provision may be a key driver for overseas study.

COUNTRY	OUTBOUND STUDENTS 2013	STUDENTS IN THE UK	STUDENTS IN THE UK - MARKET SHARE (%)	GROWTH IN OUTBOUND STUDENTS 2007-13 (%)	OUTBOUND MOBILITY RATIO 2013	TERTIARY ENROLMENT GROWTH 2007-13(%)	TERTIARY EDUCATION GROSS ENROLMENT RATIO 2013	UK TNE STUDENTS 2014
Saudi Arabia	73,548	9,344	12.70	265	5.4	101	54.9	8,360
Iran	50,053	2,650	5.30	75	1.1	54	57.8	395
Morocco	38,599	404	1.00	-5	8.6	91	22.5	505
Algeria	20,695	179	0.90	-10	1.7	39	34	110
Egypt	19,744	1,209	6.10	82	0.8	0	30.3	16,570
Jordan	19,366	1,814	9.40	46	5.4	32	-	1,920
Tunisia	16,889	93	0.60	-1	5	-2	34.1	75
Kuwait	16,799	1,814	10.80	139	23.4	95	27	6,875
Iraq	16,039	1,809	11.30	101	-	-	-	70
Israel	14,732	497	3.40	19	3.9	14	66.3	170
Lebanon	12,000	656	5.50	-12	5.2	23	45.9	3,160
Oman	11,284	1,455	12.90	10	14.5	27	-	19,000
UAE	8,530	3,025	35.50	39	6.4	65	19.2	15,850
Qatar	5,039	1,462	29.00	151	24.1	88	13.6	2,280
Bahrain	4,481	1,202	26.80	25	13.2	102	36.5	3,115

Source: UNESCO Institute for Statistics (UIS); Data extracted on 18 Feb 2017 from <http://data.uis.unesco.org/>; HESA AOR (2014–15).

In much of the MENA region outbound mobility ratios are significantly above the world average (2%), with the exception of Iran (1.1%), Algeria (1.7%), and Egypt (0.8%).

Table 1 illustrates that, apart from Saudi Arabia, non-GCC countries have higher gross tertiary enrolment ratios than GCC countries. The table also shows TNE student numbers on UK programmes. The countries with the highest demand for UK TNE are Oman and the UAE. Saudi Arabia demonstrates the highest growth in outward student mobility since 2007 (265%). Saudi Arabian gross tertiary enrolment has also increased dramatically from 29.7% in 2007 to 54.9% in 2013.

‘Overall, students from the GCC region tend to study in English-speaking destination countries, while France is most popular with students from North Africa.’

2.2 OVERSEAS STUDY DESTINATIONS FOR STUDENTS FROM THE GCC AND WIDER REGION

Table 2 analyses the study destinations of students from the GCC and selected MENA countries, focusing on Australia, France, Germany, the UK and the US.

Overall, students from the GCC region tend to study in English-speaking destination countries, while France is most popular with students from North Africa. Of the major study destinations featured in the table, the UK is the most popular for students from Iraq and for most of the GCC countries, demonstrating strong market share in Qatar (39%), the UAE (35%), Bahrain (25%) and Oman (15%).

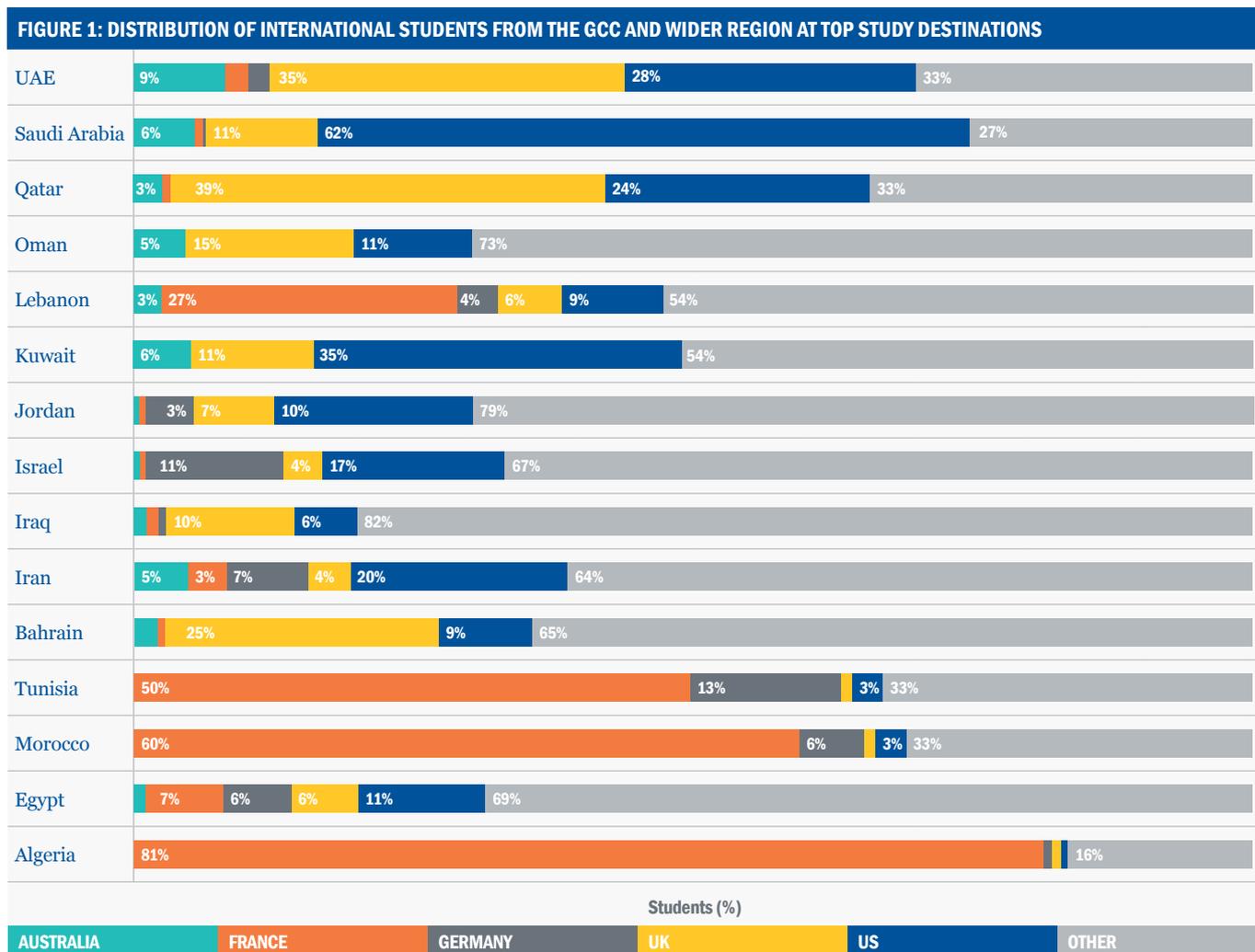
The US holds the largest market share of internationally-mobile students from Saudi Arabia (62%), Kuwait (35%), Iran (20%), Israel (17%) and Egypt (11%). France holds the largest market share of internationally mobile students from Algeria (81%), Morocco (60%), Tunisia (50%) and Lebanon (27%).

STUDY DESTINATION	AUSTRALIA	%	FRANCE	%	GERMANY	%	UK	%	US	%	OTHER	%	TOTAL ABROAD
SELECTED MENA													
Saudi Arabia	4,743	6	449	1	271	0	8,922	11	51,262	62	22,075	27	82,979
Iran	2,529	5	1,653	3	3,493	7	2,082	4	9,692	20	30,602	64	47,522
Morocco	14	0	25,223	60	2,395	6	526	1	1,259	3	12,859	30	42,262
Algeria	-	-	16,558	81	135	1	233	1	164	1	3,295	16	20,385
Egypt	200	1	1,701	7	1,466	6	1,413	6	2,692	11	16,203	69	23,475
Jordan	279	1	135	1	691	3	1,428	7	2,042	10	15,743	79	20,039
Tunisia	-	-	8,955	50	2,385	13	117	1	511	3	5,857	33	17,825
Kuwait	1,093	6	98	0	21	0	2,121	11	6,929	35	10,569	54	19,738
Iraq	483	2	373	2	290	1	2,319	10	1,418	6	19,438	82	23,838
Israel	112	1	183	1	1,585	11	508	4	2,336	17	9,430	67	14,042
Lebanon	366	3	3,749	27	539	4	817	6	1,300	9	7,511	54	13,916
Oman	586	5	31	0	57	0	1,939	15	1,430	11	9,248	73	12,705
UAE	854	9	172	2	187	2	3,267	35	2,647	28	3,036	33	9,309
Qatar	126	3	46	1	13	0	1,821	39	1,132	24	1,621	35	4,633
Bahrain	98	2	36	1	10	0	1,237	25	444	9	3,267	65	4,994

Source: UIS; Data extracted on 18 Feb 2017 from <http://data.uis.unesco.org>.

Distribution of market share is illustrated in Figure 1. Where a large proportion of students fall into ‘other’ destinations in the table above, a GCC country is often the primary destination of choice.

One of the most popular destinations for international students studying in the region is the UAE, which hosts large numbers of students from Iraq, Jordan, Oman and Egypt. For international students from Iran, ‘other’ destinations of study include Turkey and Canada. ‘Other’ destinations for Israeli students include Romania and Moldova.



Source: UIS; Data extracted on 19 Feb 2017 from <http://data.uis.unesco.org>.

2.3 SECTION SUMMARY

The UK is the most popular tertiary education destination for students from the UAE, Bahrain and Qatar. Most GCC tertiary gross enrolment ratios are comparatively lower than in much of the wider region, suggesting that demand for quality higher education outstrips supply in the domestic environment, and that this may be a significant driver for high levels of overseas study.

Of the countries analysed in this section, Saudi Arabia and Iran have the highest rates of participation in higher education. Postgraduate enrolments account for over 90% of Iranian students in the US, and most Saudi Arabian students in the UK (placement programmes are not included).

The French and US higher education systems have strong market share in the wider MENA region. Unsurprisingly, France is the overseas study destination of choice for students in francophone North Africa. Meanwhile the US is a preferred study destination for students from Kuwait, Iran and Saudi Arabia. Finally, certain countries in the GCC – notably the UAE – serve as education hubs catering to the needs of the wider region, and particularly to countries such as Egypt, Oman, Jordan and Iraq.

As GCC higher education systems grow in capacity and prestige, more students may choose to study domestically, with implications for UK and other overseas enrolments. At the same time, as GCC universities develop and mature, scope for collaborative research and TNE partnerships can be expected to increase.

3. UK UNIVERSITIES' GCC ACTIVITIES, STRATEGY AND OPERATIONS

This section of the report draws on the findings of the UUKi survey of UK universities, focusing particularly on UK HEIs' current and future strategic engagement with the region, and the way in which this is managed by institutions. Sixty-three UK institutions completed the survey.

At a headline level, the vast majority of UK HEIs (84%) which responded to the survey have some activity with the GCC. Some 11% of respondents currently have no activities in the region but are planning some future engagement. Only 4.8% of respondents had no current activities and did not plan to engage with the region in some way in the foreseeable future.

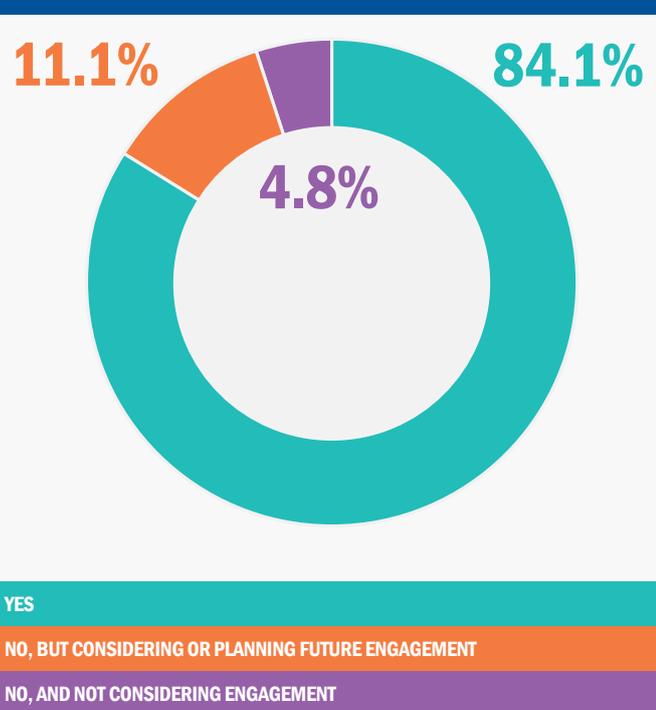
Thirty-nine HEIs (74% of the 53 active HEIs) describe their engagement with the GCC region to be a strategic priority. Within this group, 29 (74%) perceive it as a region of growing strategic importance for their institution.

3.1 ACTIVITIES

For the 53 HEIs active in the GCC region, the main activity was reported to be international student recruitment (87% or 46 HEIs), followed by collaborative research (53% or 28 HEIs) and TNE (45% or 24 HEIs). The other activities most frequently cited by respondents were continuous professional development (CPD), executive education and fundraising activities.

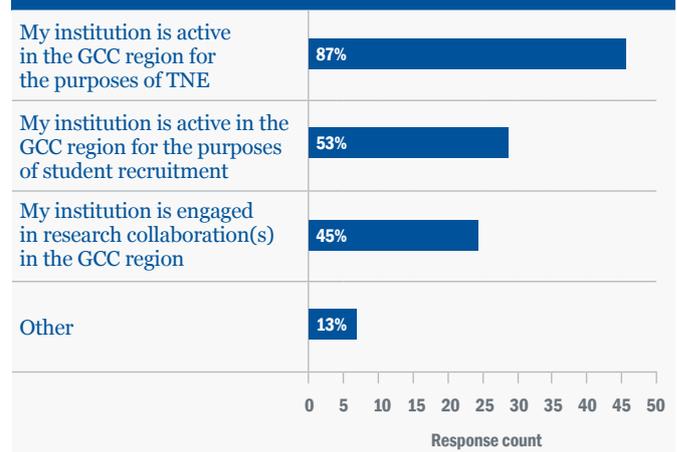
More UK HEIs are active in the UAE than in any other GCC country, followed by Saudi Arabia, Oman and Qatar. However, in certain areas such as partnership development with local HEIs and TNE, a relatively small number of UK HEIs are responsible for a high proportion of overall activity. This is explored in greater depth in the TNE section of this study.

FIGURE 2: IS YOUR INSTITUTION CURRENTLY ENGAGED WITH THE GCC REGION?



Source: UUKi UK-GCC Mapping survey, December 2016.

FIGURE 3: UK UNIVERSITIES' ACTIVITIES IN THE GCC REGION BY TYPE



Source: UUKi UK-GCC Mapping survey, December 2016.

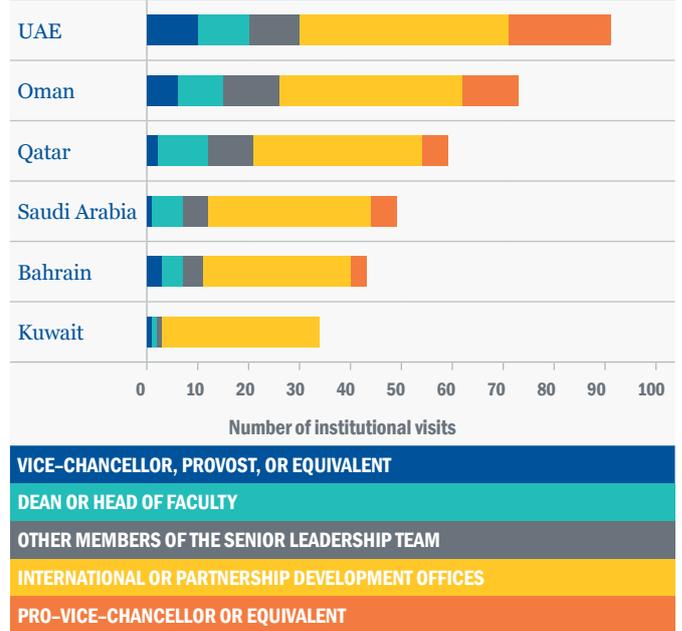
3.2 STRATEGY AND OPERATIONS

Survey respondents were asked to provide information regarding the staff resource each committed to support the delivery of their GCC strategy and activities. Of the UK HEIs active in the UAE, 37% (19 HEIs) employ up to three members of staff with specific responsibility for management of UAE activities, reflecting its strategic importance for a large proportion of the UK sector. Eighteen HEIs reported that their international teams included staff with dedicated responsibility for Oman and Qatar.

Although Saudi Arabia sends the highest numbers of students to the UK compared with the rest of the GCC region, relatively few institutions have members of staff solely responsible for Saudi Arabia. In contrast, a larger number of UK HEIs have members of staff with a country focus on states such as Oman and the UAE – which send fewer students to the UK. This may be explained by the fact that Oman and the UAE host the highest number of TNE students across the GCC region, and by the high number of UK institutions involved in partnership activities in these locations, noting that these types of activities tend to require active management by UK-based staff. In contrast to Oman and the UAE, TNE students from Saudi Arabia are concentrated in a relatively small number of UK HEIs.

The staffing trends described are replicated in visits by UK university staff to GCC countries. The UAE and Oman are the most frequently visited by UK HEI staff at all levels, and see the highest number of visits by the university leadership (vice-chancellor, provost or equivalent; pro-vice-chancellor or equivalent). Qatar also sees a high number of visits by pro-vice-chancellor staff and other members of the senior leadership team. The varied picture of staff travel painted in Figure 4 reflects the varying regional strategies and country-level priorities of different UK institutions.

FIGURE 4: INSTITUTIONAL VISITS TO GCC COUNTRIES



Source: UUKi UK-GCC Mapping survey, December 2016.

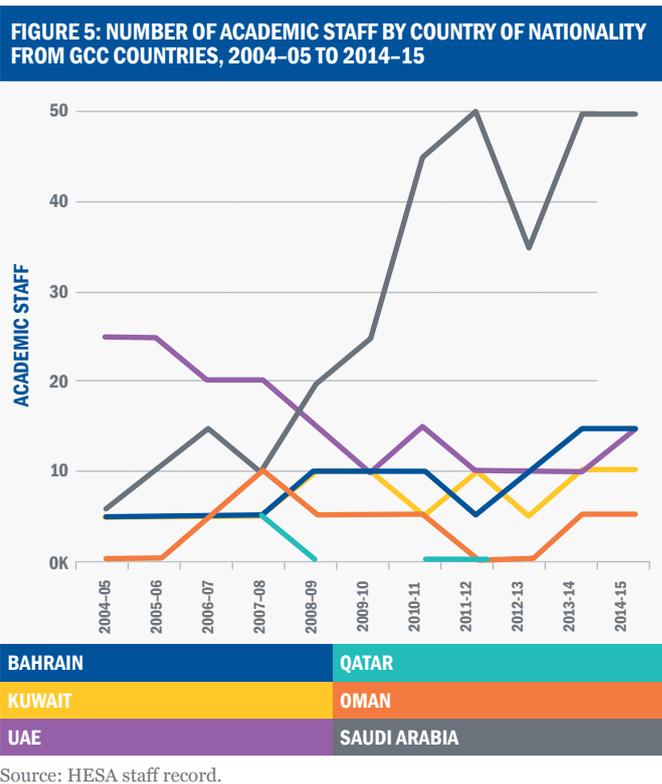
‘The UAE and Oman are the most frequently visited by UK HEI staff at all levels, and see the highest number of visits by the university leadership.’

3.3 OUTWARD MOBILITY OF UK STUDENTS TO GCC COUNTRIES

The mobility of UK-domiciled students to GCC countries is very low and was not flagged as a strategic priority by respondents to the UUKi survey. The total number of outwardly mobile students to the region was 75 students in 2013–14 and 100 students in 2014–15. In 2014–15 the most popular GCC destination for UK student outward mobility was the UAE (70 students), followed by Oman (15 students), Saudi Arabia (10 students) and Bahrain (five students). No UK-domiciled students were recorded as outwardly mobile to Qatar or Kuwait.

3.4 GCC STAFF EMPLOYMENT AT UK UNIVERSITIES

Over the past decade (2004–05 to 2014–15), except for staff holding Saudi Arabian nationality, there were fewer than 30 staff from each GCC country working in UK HEIs. Numbers of Saudi Arabian staff at UK HEIs reached 50 in 2011–12, 2013–14 and 2014–15.



3.5 SECTION SUMMARY

The vast majority of UK HEIs responding to the UUKi survey (84%) have some activity in the GCC. Universities’ activities in the GCC cover a broad spectrum, comprising international student recruitment, research collaboration, the development of transnational education partnerships, provision of continuous professional development and executive education, and consultancy with business and industry.

The vast majority of UK HEIs responding to the UUKi survey

84%

have some activity in the GCC

Student recruitment and engagement with GCC national agencies were the most frequently cited activities across the region, though there are differences in type of engagement at country level, and from institution to institution. TNE activities and partnership development with GCC institutions feature highly in the UAE and Oman, while research collaboration features more prominently in Qatar and Saudi Arabia.

The GCC countries hosting high concentrations of TNE activity, where a high number of UK institutions are active, are those most likely to be resourced with a dedicated UK-based member of university staff supporting country-level activities, and are those most likely to be the focus of institutional visits. There are very low numbers of UK students engaged in outward mobility to the GCC, and similarly low numbers of GCC staff working in UK HEIs.

Case Study

CARDIFF METROPOLITAN UNIVERSITY – THE ARAB EUROPEAN LEADERSHIP NETWORK IN HIGHER EDUCATION (ARELEN)

The Arab European Leadership Network in Higher Education (ARELEN) was created to support liaison between universities in the MENA region and Europe, delivering capacity building activities through bespoke workshops and disseminating best practice in teaching, learning and management.

BRINGING TOGETHER 200 ARABIC UNIVERSITIES AND 100 EUROPEAN UNIVERSITIES, THE NETWORK IS BASED IN AMMAN, JORDAN AT THE HEADQUARTERS OF THE ASSOCIATION OF ARAB UNIVERSITIES (AARU).

The network is a collaborative initiative founded by Cardiff Metropolitan University in 2013 in partnership with the AArU, and is an outcome of the EU-funded Tempus project ‘Leadership in Higher Education Management’, coordinated by Cardiff Metropolitan.

The vision of ARELEN is to enhance the leadership capacity of current, aspiring and potential leaders in the higher education sector in the Middle East and North Africa region alongside higher education leaders in Europe.

ARELEN is governed by an international Governance and Advisory Board which guides the network’s strategic direction and oversees performance, while an Executive Board implements strategy and operational activities.

To date, ARELEN has trained over 100 leaders from the MENA region and delivered six successful training programmes in Egypt, Jordan, Oman, Bahrain and the UK.

4. GCC STUDENT ENROLMENTS AT UK HEIs

The analysis in this section draws on student data from the following two groups of countries: GCC states (Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the UAE) and selected non-GCC countries included for context (Lebanon, Iraq, Iran, Israel, Jordan, Egypt, Morocco, Algeria and Tunisia).

It focuses on GCC student enrolments in the UK, sources of tuition fees and how these have changed over time. Through analysis of UUKi survey data, an attempt is made to identify which channels for international student recruitment have been most successful for UK institutions.

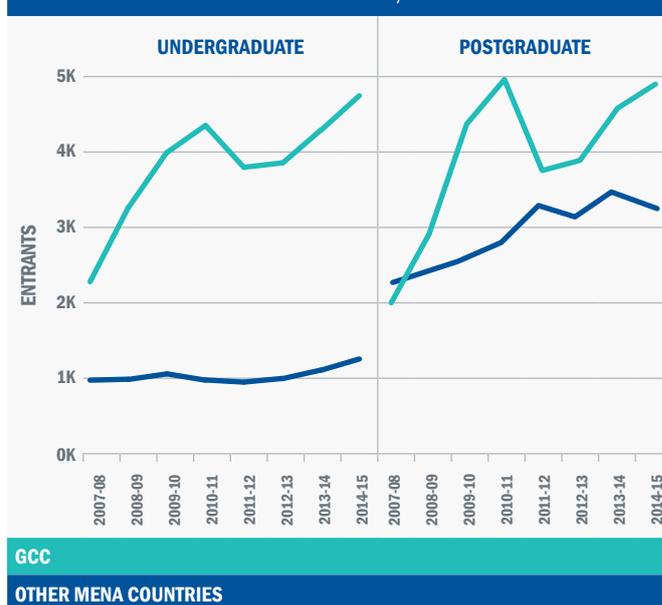
4.1 GCC STUDENT ENROLMENT TRENDS

The number of full-time undergraduate students from GCC countries studying at UK higher education providers grew by 121% between 2007 and 2015, up from 4,675 students in 2007–08 to 10,325 students in 2014–15. During this period, numbers remained constant in the years 2012–13 and 2013–14 but increased in 2014–15.

The number of full-time postgraduate students from GCC countries studying at UK universities has grown by 127% during the same period, from 3,460 students in 2007–08 to 7,860 in 2014–15. Most of this growth took place between 2007–08 and 2010–11, when the number of students increased from 3,460 students in 2007–08 to 7,710 students in 2010–11. This was followed by a 12% decrease over the following two years, then an increase of 16% between 2012–13 and 2014–15.

Figure 6 shows that most GCC students in the UK are studying at undergraduate level (as observed earlier, Saudi Arabia is an important exception). By contrast, students from the wider region are in their majority enrolled on postgraduate courses. As described in an earlier section of the report, strong demand for undergraduate study overseas from GCC students may be partially explained by limited domestic provision of quality tertiary education across the GCC states.

FIGURE 6: NUMBER OF FULL-TIME ENTRANTS BY LEVEL OF STUDY FROM GCC AND SELECTED NON-GCC COUNTRIES, 2007–08 TO 2014–15

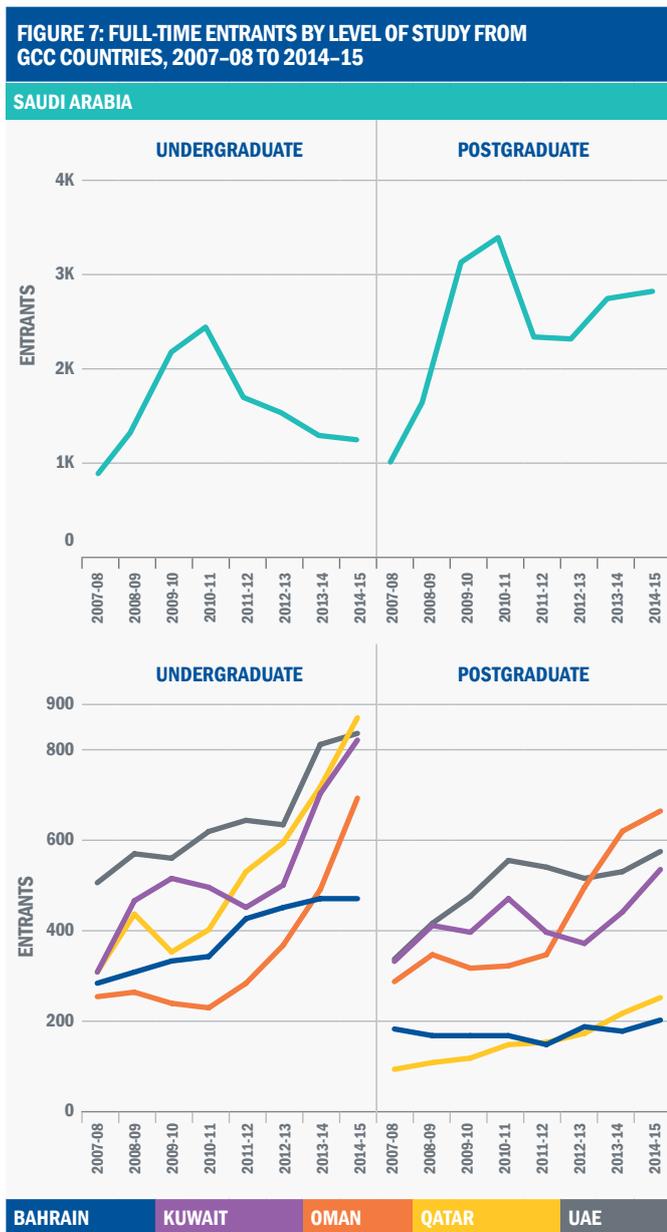


Source: Analysis of HESA student record, various years.

‘The number of full-time undergraduate students from GCC countries studying at UK higher education providers grew by 121% between 2007 and 2015.’

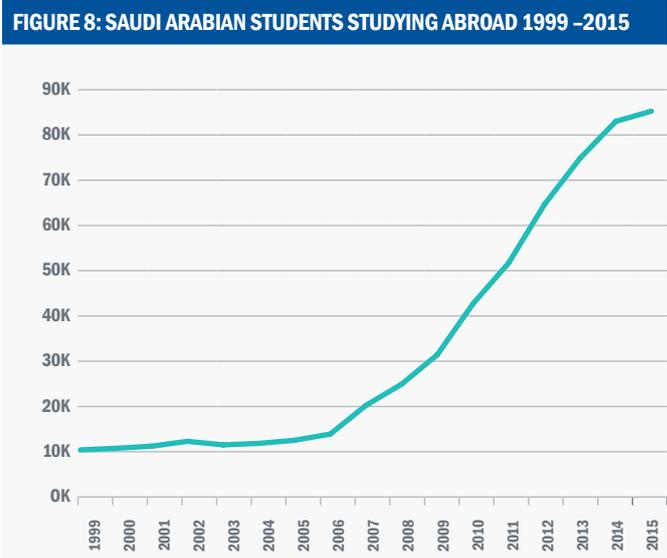
Figure 7 illustrates that full-time undergraduate students from Saudi Arabia have declined in number since 2011, while enrolments from other GCC countries continued to increase. As Saudi Arabian full-time students make up the largest group of postgraduate GCC students, the curve showing overall GCC postgraduate student enrolments mirrors the recruitment pattern of Saudi students (See Figure 6 for comparison).

In contrast to the decline observed in undergraduate Saudi Arabian students, there has been a notable increase in the number of students from Oman at both undergraduate and postgraduate levels from 2011–12 to 2014–15. Qatar and Kuwait also show very strong growth in undergraduate enrolments.



Source: Analysis of HESA student record, various years.

As Figure 8 illustrates, the decline in enrolments of Saudi Arabian students experienced by the UK in recent years is in stark contrast to strong and continued overall growth in globally mobile Saudi Arabian students studying overseas in other higher education systems.



Source: UIS 1999 – 2015; Data extracted on 18 Feb 2017 from <http://data.uis.unesco.org>

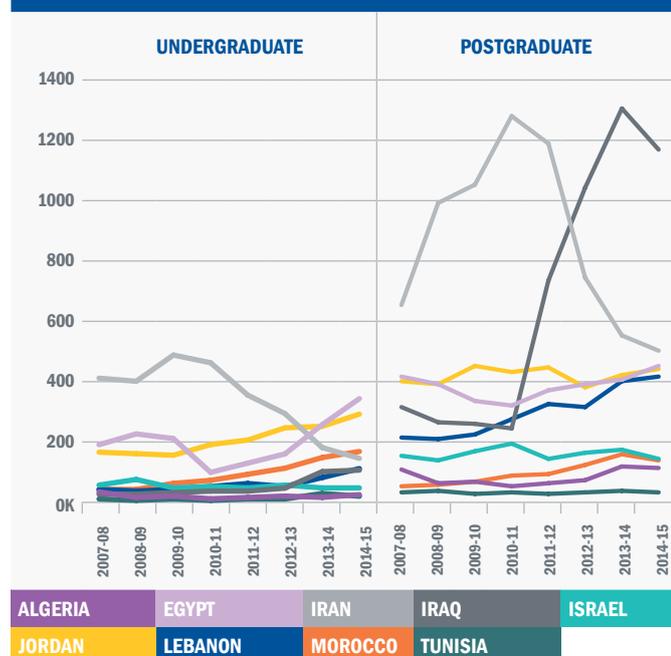
To situate GCC recruitment and mobility trends in context, Figure 9 illustrates student enrolments from other (non-GCC) MENA countries.

There was a large increase in postgraduate students to the UK from Iraq from 2010. Growth was driven mainly by scholars funded by the Kurdistan Regional Government Human Capacity Development Programme and the Ministry of Higher Education and Scientific Research (MOHESR) and facilitated by the British Universities Iraq Consortium⁸. Data from the UNESCO Institute for Statistics (UIS) shows there has been a continued growth in Iraqi students studying abroad; however, the main study destinations for these students were non-traditional host countries such as Jordan, UAE, Ukraine and Malaysia. The UK is the 5th most popular study choice for Iraqi students.

UK university enrolments from Iran peaked in 2010 and started to decline thereafter at all levels of study. Analysis of UIS data shows that international student enrolments from Iran dipped in 2013 and have been recovering ever since. Most of Iran’s globally mobile students have chosen to study in the US, Turkey, Canada, Italy, Germany and Malaysia. Patterns of enrolment from Iran contrast with a dramatic increase in the number of outwardly mobile Iraqi students from 2010.

Trends in Saudi Arabia and Iran are important as they both demonstrate cases in which the total number of outwardly mobile students – that is, the demand for international higher education – is increasing, yet the UK’s market share is shrinking. Further investigation of these trends in future research would be valuable in order to fully establish the reasons behind this.

FIGURE 9: NUMBERS OF FULL-TIME ENTRANTS BY LEVEL OF STUDY FROM SELECTED NON-GCC COUNTRIES, 2007-08 TO 2014-15



Source: Analysis of HESA student record, various years.

4.2 SOURCES OF FUNDING FOR GCC STUDENTS

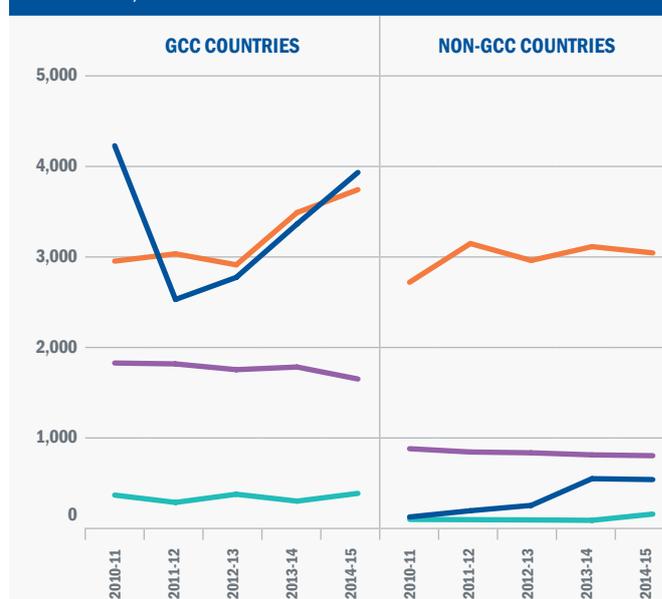
This section analyses funding sources for GCC students at undergraduate and postgraduate levels during the period 2010–11 to 2014–15. To better capture shifts in student demand, the analysis focuses on full-time students who are starting their degree in the UK, referred to as ‘entrants’.

Figure 10 shows the number of full-time entrants from GCC and selected non-GCC countries by source of funding.

The number of GCC entrants benefitting from a government scholarship or similar support decreased by 40% between 2010–11 and 2011–12. After this dip, the number of government-funded GCC students studying in the UK grew by 55% from 2011–12 to 2014–15, with a notable 29% increase in self-funded entrants between 2012–13 and 2014–15.

The main variation identified across the selected countries is that most GCC entrants receive a high proportion of government funding whilst in contrast, a higher percentage of entrants from non-GCC countries are self-funded. For example, 66% entrants from North Africa are self-funded.

FIGURE 10: NUMBER OF FULL-TIME ENTRANTS BY SOURCE OF FUNDING, 2010-11 TO 2014-15

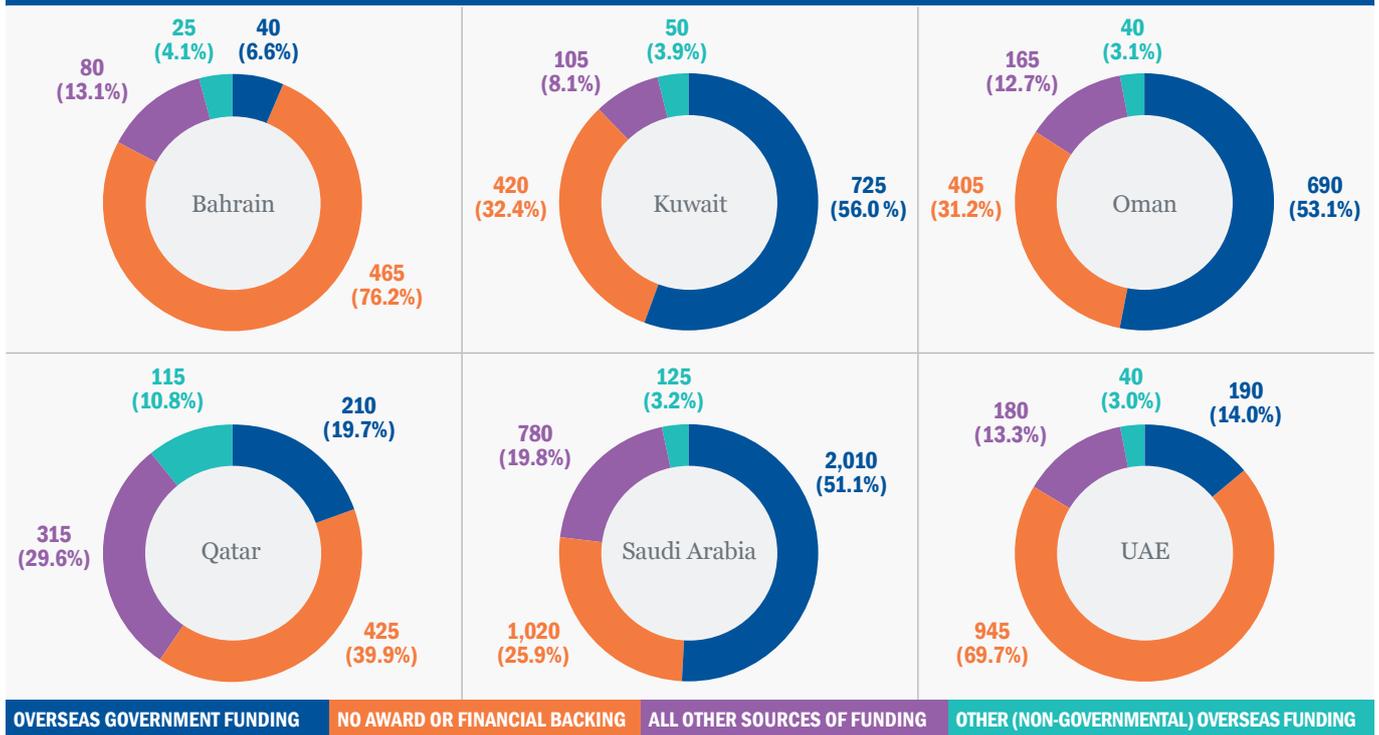


MAJOR SOURCE OF TUITION FEES (GROUP)

OVERSEAS GOVERNMENT FUNDING	NO AWARD OR FINANCIAL BACKING
ALL OTHER SOURCES OF FUNDING	OTHER (NON-GOVERNMENTAL) OVERSEAS FUNDING

Source: Analysis of HESA student record, various years.

FIGURE 11: PERCENTAGE AND NUMBER OF FULL-TIME GCC ENTRANTS BY SOURCE OF TUITION FEE, 2014–15



Source: Analysis of HESA student record.
 Note: Numbers of students.

Figure 11 shows that the highest percentage of government-funded full-time entrants in 2014–15 were from Kuwait (56%), Oman (53%) and Saudi Arabia (51%). Conversely, over three quarters of full-time entrants from Bahrain (76%) and over two thirds from the UAE (70%) were self-funded.

The proportion of government-funded local students from the UAE appears under-stated (14%), because figures include high proportions of third country national residents. If solely Emirati national students are considered, around 46% receive government funding for their studies in the UK⁹. Third-country nationals resident in the UAE (for example, those from India, Pakistan, Egypt and the UK) are ineligible for funding for overseas study from the UAE government.

Beyond funding from government sources, Qatar stands out with a larger percentage of students funded by ‘Overseas industry, commerce or provider’. 16% of Qatari students in 2014–15 were funded by employers, 6% by overseas industry or commerce and 5% by overseas providers.

‘Government scholarships from Kuwait and Oman more than doubled and tripled respectively over the period from 2010–11 to 2014–15.’

FIGURE 12: MAIN SOURCES OF FUNDING FOR FULL-TIME FIRST-YEAR STUDENTS

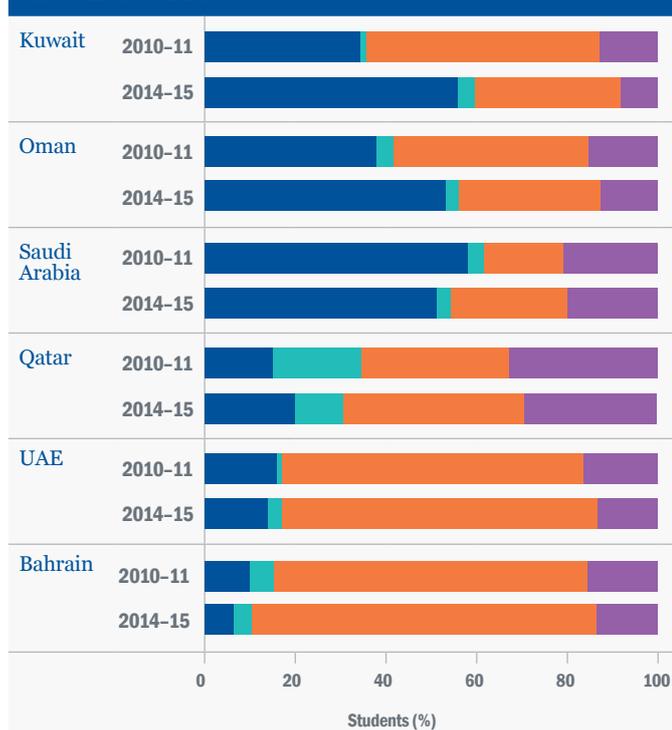


Figure 12 shows that the percentage of government-funded students from Kuwait and Oman increased between 2010–11 and 2014–15, while the percentage of government funded students from Saudi Arabia dipped in 2011–12 and has been gradually recovering ever since. The percentage of government-funded students from Bahrain, Qatar and the UAE has fluctuated since 2010–11 and shows no distinct trends.

For students from GCC countries studying at UK higher education providers, the two main sources for tuition fees are ‘Other overseas sources’ (this includes those sponsored by their own national governments, 45.2% in 2014–15) and ‘no financial backing’ (38.5%)¹⁰ – ie self-funding students.

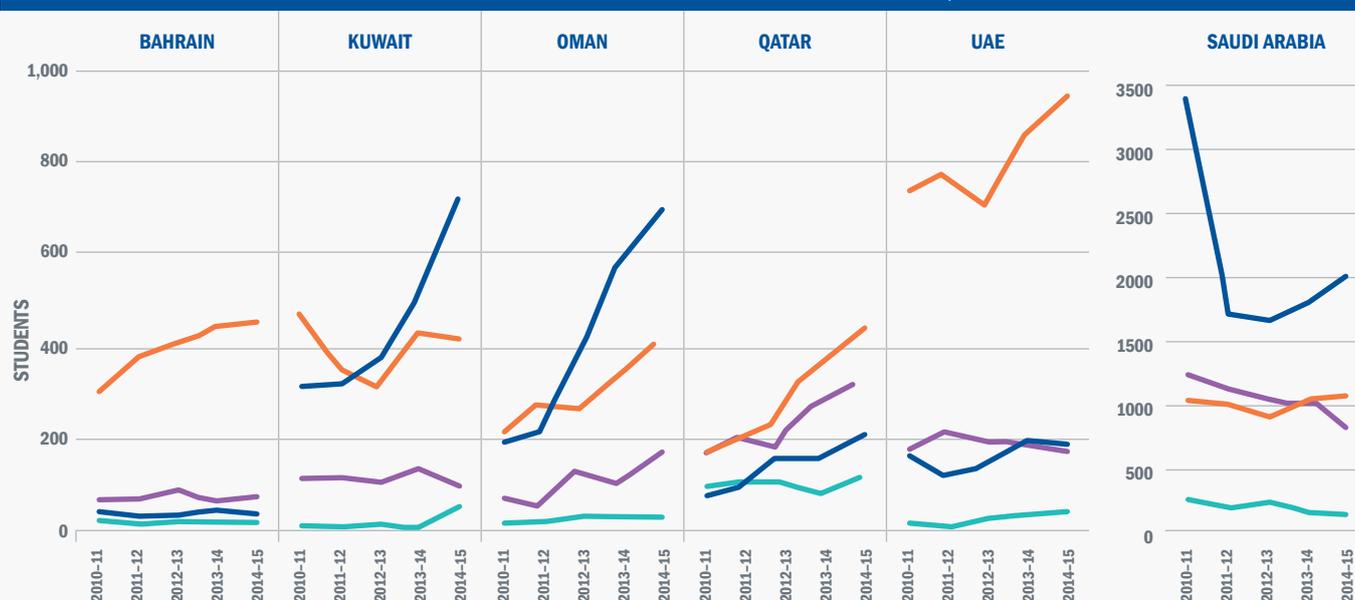
From the selected non-GCC countries in 2014–15, 64.3% had no award or financial backing and 17.5% were supported by other overseas sources, including government scholarships. Government scholarships from Kuwait and Oman more than doubled and tripled respectively over the period from 2010–11 to 2014–15.

MAJOR SOURCE OF TUITION FEES (GROUP)



Source: Analysis of HESA student record, various years.

FIGURE 13: NUMBERS OF FULL-TIME FIRST-YEAR STUDENTS BY SOURCE OF FUNDING AND GCC COUNTRY, 2010-11 TO 2014-15

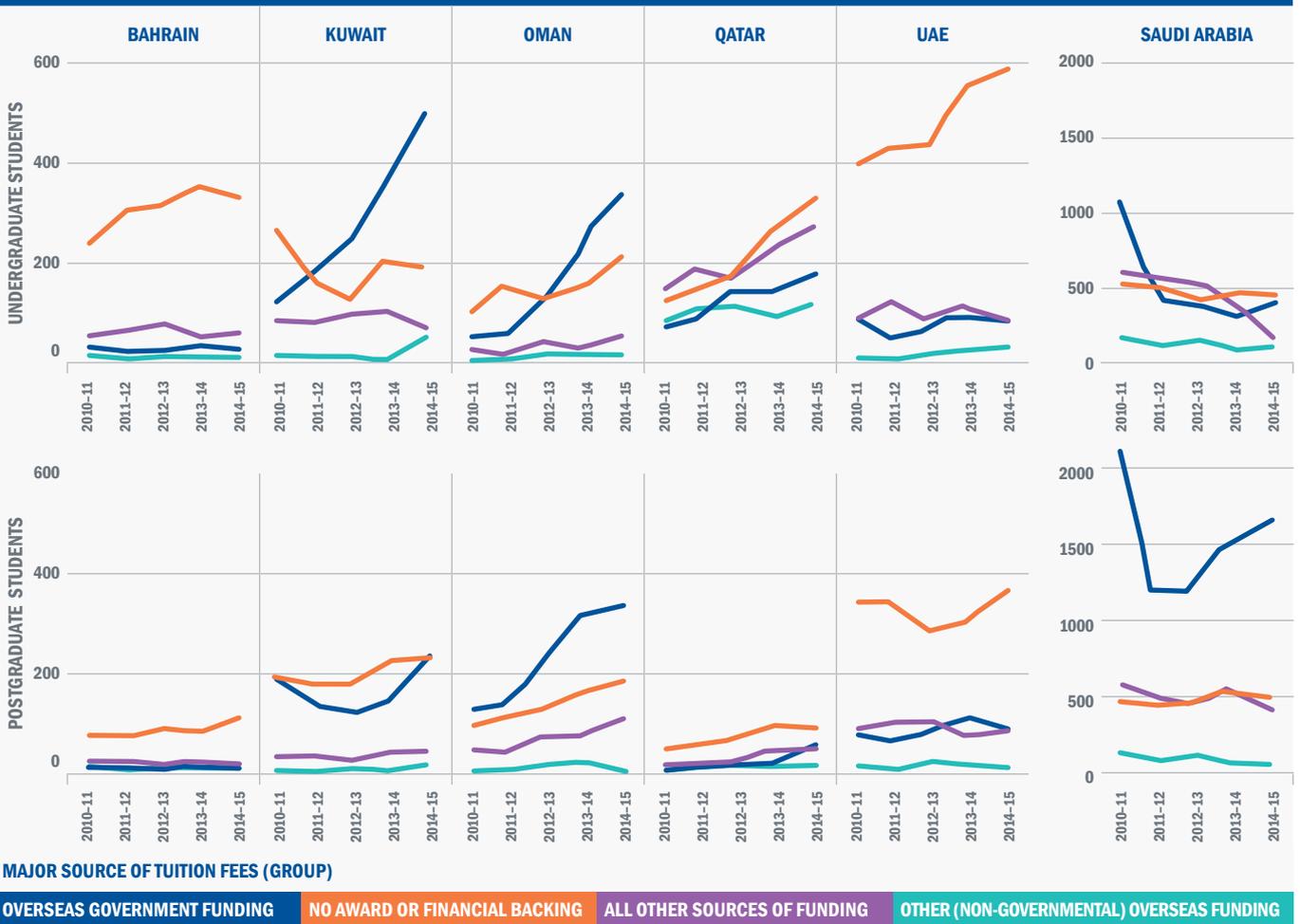


MAJOR SOURCE OF TUITION FEES (GROUP)



Source: Analysis of HESA student record, various years.

FIGURE 14: NUMBERS OF FULL-TIME FIRST-YEAR STUDENTS BY SOURCE OF FUNDING, GCC COUNTRY AND LEVEL OF STUDY, 2010–11 TO 2014–15



Source: Analysis of HESA student record, various years.

It is worth noting a dip in self-funded students from Kuwait, Oman and the UAE in 2012–13. A closer look at students with UAE domicile shows the decline is mainly attributable to students with Indian nationality, whose numbers have since recovered. This decline, allowing for lag effects, may be related to the fall in earnings by Indian nationals in the UAE in the period that followed the Global Financial Crisis (the largest proportions of bilateral remittances to India are generated in the UAE – 18% of all bilateral remittances in 2015)¹¹. The overall growth in self-funded students with UAE domicile in 2014–15 was primarily driven by Indian and other third country nationals¹².

As illustrated in Figure 14, funding bodies in Kuwait, Qatar and Oman are comparatively more likely to sponsor undergraduate students, while the government of Saudi Arabia has prioritised funding for postgraduate students.

‘A closer look at students with UAE domicile shows the decline is mainly attributable to students with Indian nationality, whose numbers have since recovered.’

4.3 APPROACHES TO GCC STUDENT RECRUITMENT

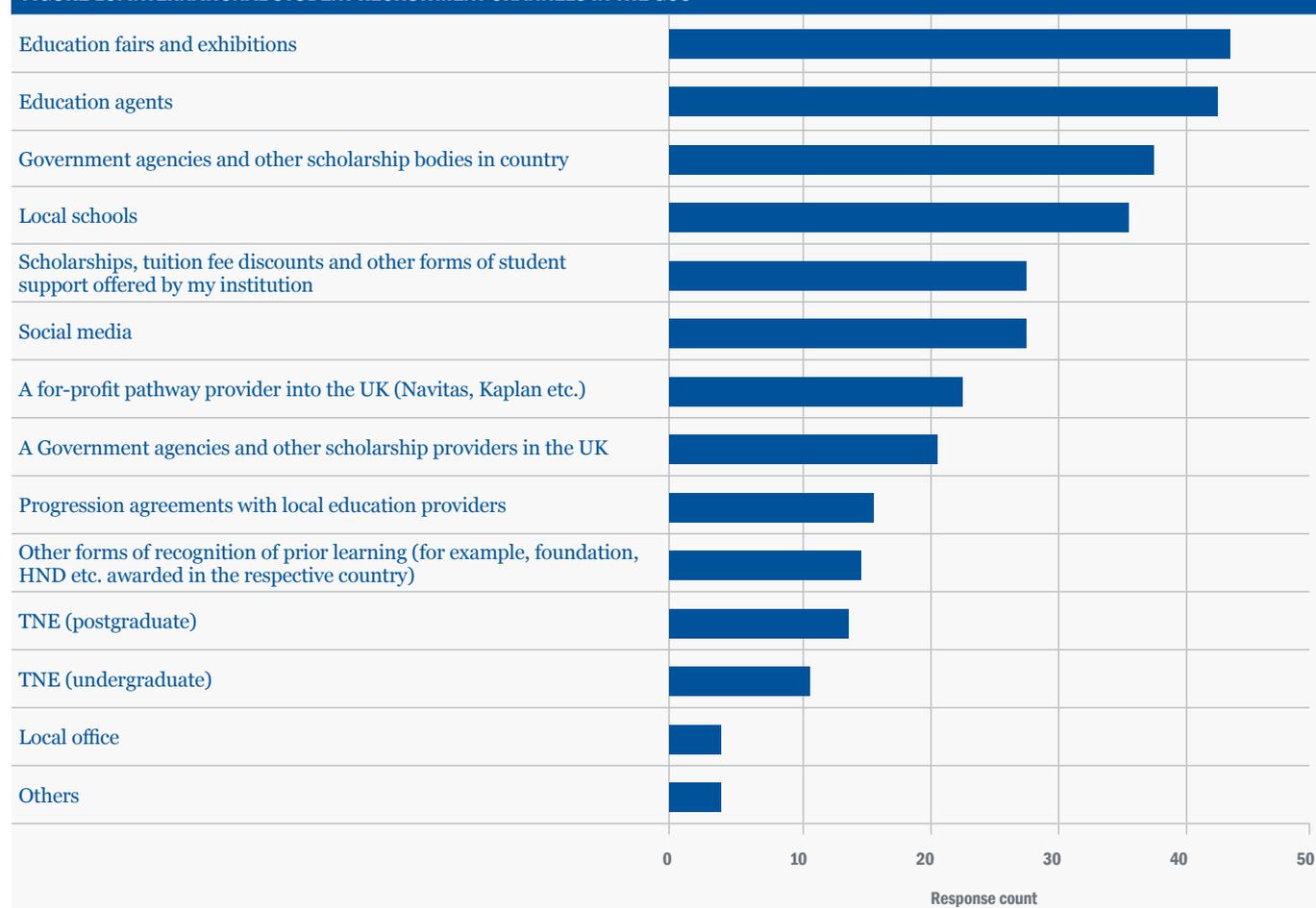
This section examines the experience of UK HEIs active in recruiting students from the GCC states. It attempts to identify the recruitment practices which have contributed most strongly to growth in GCC enrolments in recent years.

The channels most commonly used by UK HEIs to support international student recruitment across the GCC states are: education agents, education fairs and exhibitions and engagement with local government agencies. A large proportion of the surveyed HEIs active in this area (36 HEIs or 73%) also work with local schools.

In all GCC countries except Saudi Arabia, where most students are postgraduate scholarship holders, working with local schools was cited as the main channel supporting growth in undergraduate recruitment. More than half of the HEIs working with local schools experienced growth in all GCC markets.

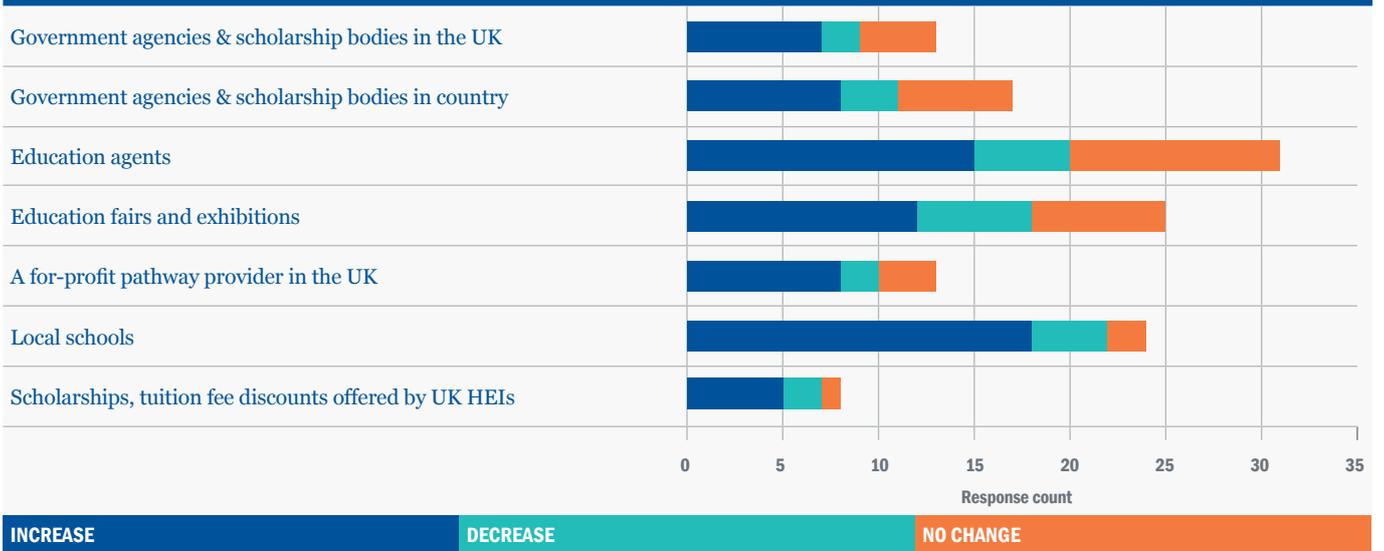
‘More than half of the HEIs working with local schools experienced growth in all GCC markets.’

FIGURE 15: INTERNATIONAL STUDENT RECRUITMENT CHANNELS IN THE GCC



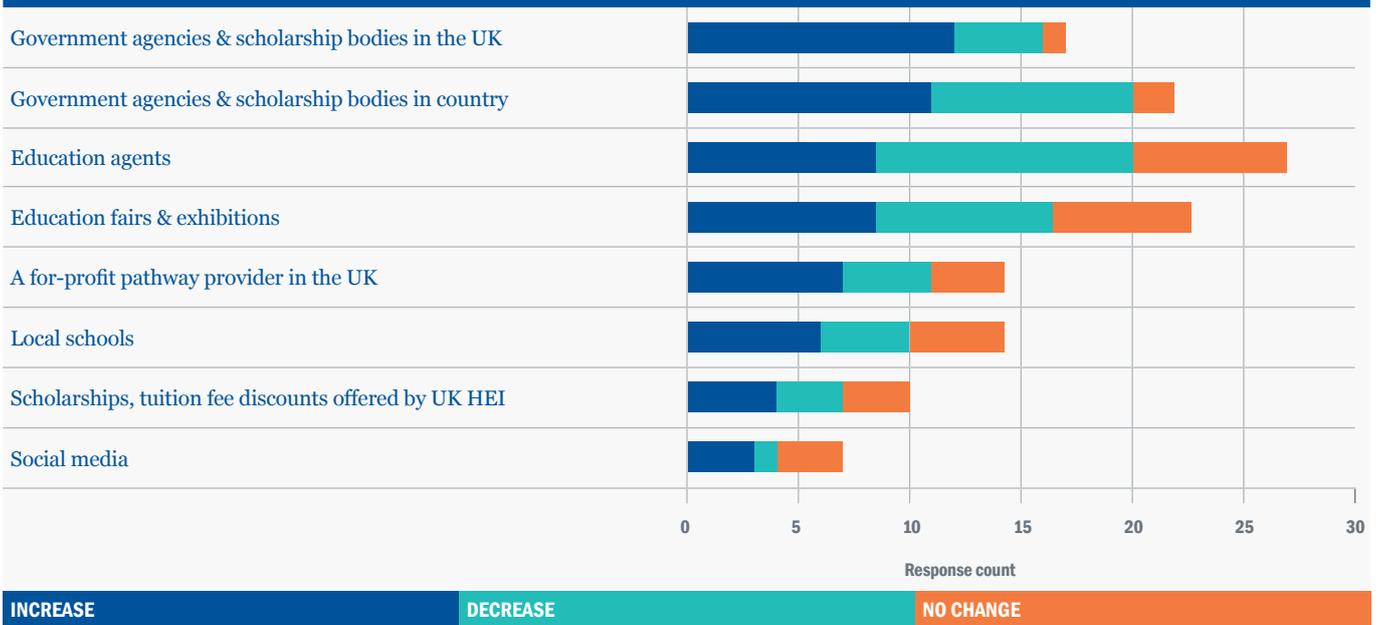
Source: UUKi UK-GCC mapping survey, December 2016.

FIGURE 16: INTERNATIONAL STUDENT RECRUITMENT CHANNELS USED BY UK UNIVERSITIES IN THE UAE



Source: UUKi UK-GCC mapping survey, December 2016.

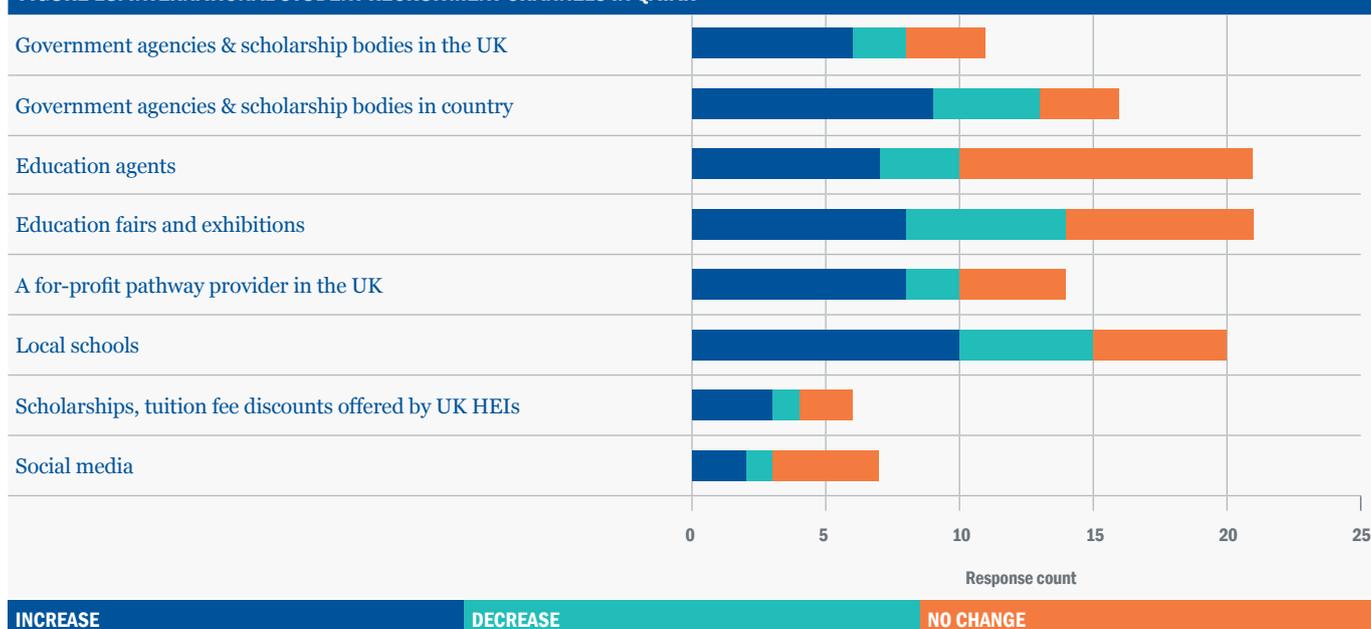
FIGURE 17: INTERNATIONAL STUDENT RECRUITMENT CHANNELS IN SAUDI ARABIA



Source: UUKi UK-GCC mapping survey, December 2016.

The channels most commonly used by UK HEIs to support enrolments from Saudi Arabia (engagement with government agencies and scholarships bodies, education agents and fairs) have recently become less effective for some institutions.

This may be linked to a reduction in government-funded scholarships and tighter eligibility criteria for the Custodian of the Two Holy Mosques scholarship programme (formerly the King Abdullah Scholarship Programme or KASP).

FIGURE 18: INTERNATIONAL STUDENT RECRUITMENT CHANNELS IN QATAR

Source: UUKi UK-GCC mapping survey, December 2016.

GCC scholarship criteria have also been tightened in recent years to prioritise support for postgraduate and research degrees, national priority subjects, and to focus on a smaller number of eligible overseas HEIs¹³. New restrictions stipulate that scholarship students must choose to study at either one of the top 100 institutions globally, or in a programme that is rated in the top 50 in its field.

HESA data from 2014–15 show that 54% of Saudi Arabian students sponsored by their government studied in the fields of business, engineering, computer sciences and subjects allied to medicine. This is mirrored in Saudi Arabia's research output – also dominated by engineering, sciences and medicine – and reflects national developmental priorities.

4.4 SECTION SUMMARY

The channels most commonly used by UK HEIs to support international student recruitment across the GCC are:

- education agents,
- education fairs and exhibitions, and
- engagement with local government agencies.

Saudi Arabia apart, the strongest driver of growth for UK HEI enrolments across the GCC has been working with local schools.

GCC scholarship criteria have been tightened in recent years to prioritise support for postgraduate and research degrees, national priority subjects, and to focus on a smaller number of eligible overseas HEIs¹⁴. UK-GCC cooperation in this area is limited by the use of rankings-based eligibility lists by regional funders to select UK partners. The use of global university league tables in this way can have the effect of obscuring discipline-specific pockets of excellence, as well as small and specialist institutions which may be world-leading in their specific of specialisation. UK agencies could work together with GCC counterparts in order to develop a more nuanced approach.

Case Study

CARDIFF UNIVERSITY'S RECRUITMENT AND PARTNERSHIPS STRATEGY IN THE GCC

Cardiff University has, for many years, enjoyed strong popularity as a study destination for students from the GCC countries.

THE UNIVERSITY'S REGIONAL RECRUITMENT STRATEGY EMPHASISES THREE AREAS: BUILDING AND SUSTAINING STRONG RELATIONSHIPS; ALIGNING CARDIFF UNIVERSITY ACADEMIC PROGRAMMES WITH GCC NEEDS; AND STRATEGIC USE OF NETWORKS.

BUILDING AND SUSTAINING STRONG RELATIONSHIPS

Success in the GCC region hinges on strong and trusting relationships. Cardiff University works particularly closely with the London embassies of the major Gulf States, to support recruitment activity and to ensure a high standard of pastoral care is provided to current students. In the GCC countries, Cardiff University chooses to work with only a limited number of recruitment agencies, focusing on the development of strong working relationships with representatives.

Cardiff University is fortunate to have a long-standing alumni network in the GCC countries and wider region – in some cases serving as a study destination for three generations of the same family. Alumni contacts and professional networks enhance the institution's profile and reach in GCC markets, noting the power of word-of-mouth recommendation in GCC societies.

ALIGNING CARDIFF UNIVERSITY'S ACADEMIC PROGRAMMES WITH GCC NEEDS

The academic programmes most popular with GCC students – engineering, business, healthcare and life sciences courses – align closely with the requirements of GCC sponsors to up-skill populations in line with national economic plans. The university has its own in-house foundation programme, which increases the appeal of Cardiff University programmes to regional agencies with a preference for this route.

As one of relatively few universities offering specialised clinical masters programmes in dentistry, Cardiff University works to promote these programmes in Gulf States offering relevant sponsorship opportunities. Cardiff University's top-up programmes in allied health professions and related subjects have also proved popular with students from across the GCC.

Cardiff has opted to focus on a relatively small number of TNE collaborations. One example was the establishment of a top-up nursing programme, delivered in Oman, enabling Omani students to achieve a Cardiff University nursing award via a flying faculty arrangement.

STRATEGIC USE OF NETWORKS

Internally, close engagement by Cardiff University's recruitment and partnerships teams with university academic staff, so as to draw on existing relationships cultivated through research activity or similar, serves to inform regional strategy. Externally, ensuring that Cardiff University is represented on the right networks means the university remains alert to the latest intelligence and opportunities. Cardiff University was a founder member of the British Council UK Saudi Interest Group, and is an active participant in the British Universities Iraq Consortium and UUK International's Middle East & North Africa Policy Network.

5. TRANSNATIONAL EDUCATION PARTNERSHIPS BETWEEN UK AND GCC HEIs

The GCC region is a hotspot for UK TNE. Demand is driven both by regional demographics and limited domestic capacity, factors that have resulted in GCC government initiatives to encourage overseas HEIs to offer higher education provision across the region.

5.1 DEMAND DRIVERS FOR TNE

GCC DEMOGRAPHIC PROFILE

Approximately 60% of the population of GCC countries is under the age of 16. Youth populations have grown particularly rapidly in Bahrain, Kuwait, Oman and Saudi Arabia. Consequently, GCC governments have sought to expand their domestic higher education capacity through increased private provision, delivered in part by overseas HEIs.

HIGH PROPORTION OF THIRD COUNTRY NATIONALS

There is heavy labour market dependence on migrant workers in the GCC states. Once considered temporary migrants, GCC's non-national resident communities have in many cases now become long-term settled families with children. Given their non-national status, access to local public higher education is usually restricted, leaving private provision as their only option¹⁵.

TNE has aided the growth of private higher education provision in the GCC. In some countries, local private higher education institutions are actively encouraged by regulatory bodies to forge academic affiliations with overseas HEIs. These kinds of incentives have given TNE an additional boost.

TNE in the region is typically delivered in English, which increases the appeal of the programmes to student audiences beyond the domestic population alone. This has widened access for third country nationals resident in GCC states (mainly from South Asia and Africa) and other international students. Table 3 below shows the migrant population across the six GCC states. Qatar and the UAE have the highest proportions of third country national resident populations globally – 91% and 89% respectively.

TABLE 3: RESIDENT MIGRANT POPULATION AS A PERCENTAGE OF THE TOTAL POPULATION

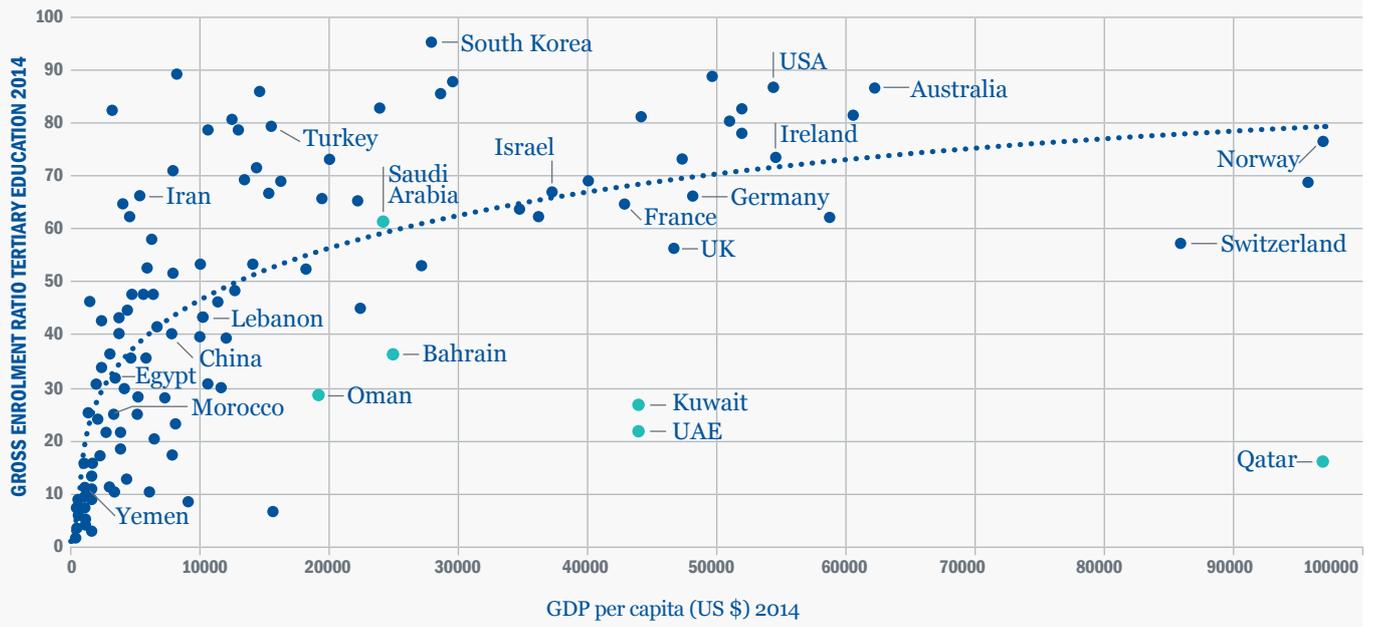
COUNTRY	MIGRANT POPULATION (% OF TOTAL POPULATION)
Bahrain	52
Kuwait	72
Oman	44
Qatar	91
Saudi Arabia	32
UAE	89
Total	49

Sources: Migration Remittances Factbook 2016; Gulf Labour Markets and Migration; ILO¹⁶.

LIMITED DOMESTIC HIGHER EDUCATION CAPACITY IN THE GCC

Except for Saudi Arabia, participation rates in tertiary and higher education remain significantly below the levels recorded in high-income countries. The average participation rate in tertiary education for high-income countries is 74% whereas in the GCC states it is just under 32%¹⁷.

FIGURE 19: GROSS ENROLMENT RATIO IN TERTIARY EDUCATION PLOTTED AGAINST GDP PER CAPITA (CURRENT US\$)



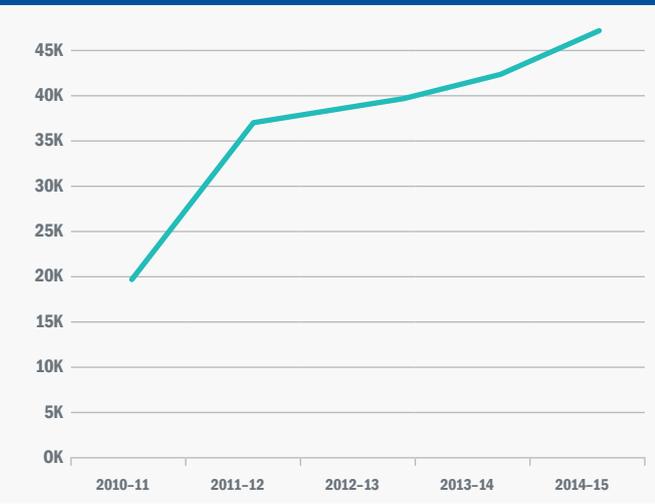
Source: UIS data and the World Bank World Development Indicators – data extracted on 15 February 2017.

5.2 CURRENT PROVISION OF UK TNE IN THE GCC

UK TNE NUMBERS IN THE GCC

Students enrolled on UK programmes delivered through TNE in GCC countries increased from 20,545 students in 2010–11 to more than 45,000 students in 2014–15. This is a 125% increase in student numbers, which is substantially higher than the corresponding growth in traditional international student recruitment to the UK over the same period.

FIGURE 20: UK TNE ENROLMENTS IN THE GCC 2010–11 TO 2014–15



Source: HESA Aggregate Offshore Record 2010–11 to 2014–15.

Note: This chart excludes Oxford Brookes University¹⁹.

It includes all levels and all modes of study.

Table 4 compares GCC students in the UK in the period 2011–14 and GCC students registered on UK TNE programmes over the same period, showing a positive correlation between the number of GCC students in the UK and the number of students registered on UK TNE programmes.

The number of UK TNE students is more than two times higher than the number of GCC students studying in the UK. The countries with the highest proportions of TNE students are Oman and the UAE, in which 88% (Oman) and 78% (UAE) students working towards a UK award complete their studies via UK TNE in their home country.

TABLE 4: GCC STUDENTS IN THE UK COMPARED WITH GCC STUDENTS STUDYING UK TNE PROGRAMMES 2011–12 TO 2013–14

COUNTRY	STUDENTS IN UK 2011–12	STUDENTS IN UK 2014–15	GROWTH 2011–14 (%)	UK TNE 2011	UK TNE 2014	GROWTH 2011–14 (%)	TOTAL STUDENTS ON UK PROGRAMMES 2014	UK TNE STUDENTS 2014 (% OF TOTAL)
Bahrain	1,120	1,320	18	1,605	1,870	13	3,190	59
Kuwait	1,835	2,605	42	3,725	6,545	76	9,150	72
Oman	1,210	2,415	100	12,110	17,710	46	20,125	88
Qatar	1,260	2,200	75	930	1,610	73	3,810	42
Saudi Arabia	9,860	8,595	-13	8,555	7,580	-11	16,175	47
UAE	3,100	3,410	10	10,055	11,990	19	15,400	78
GCC total	18,385	20,545	12	36,980	47,295	28	67,840	70

Source: HESA Student record 2011–12 to 2014–15 and HESA Aggregate Offshore Record 2011–12 to 2014–15.

Note: Analysis excludes Oxford Brookes University.

TYPES OF UK TNE DELIVERY IN THE GCC

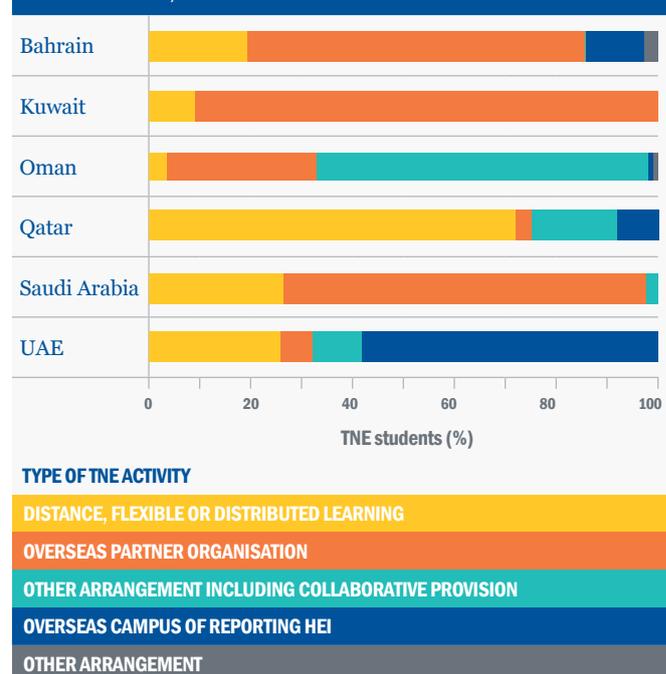
As demonstrated in the Table 5, 33% of overall UK TNE activity in the GCC countries in 2014–15 fell into the category of ‘other arrangement including collaborative provision’, 31% as ‘distance, flexible or distributed learning’, and 27% as ‘overseas partner organisation’. Only 6% of UK TNE students in the GCC studied at UK overseas branch campuses.

Figure 21 shows there is significant variation in forms of UK TNE provision across the GCC countries. ‘Overseas campus’ provision makes up 58% of the UK TNE activity in the UAE, while ‘other arrangements including collaborative provision’ makes up 65% of activity in Oman. The most prevalent category of TNE in Kuwait, Saudi Arabia and Bahrain is ‘overseas partner organisations’, followed by ‘distance, flexible or distributed learning’¹⁹.

TABLE 5: UK TNE ACTIVITY BY TYPE, 2014–15

TYPE OF ACTIVITY	PERCENTAGE OF UK TNE IN GCC COUNTRIES
Other arrangement including collaborative provision	33%
Distance, flexible or distributed learning	31%
Overseas partner organisation	27%
Overseas campus of reporting HEI	6%
Other arrangement	3%

Source: HESA Aggregate Offshore Record 2011–14.

FIGURE 21: PERCENTAGE OF TNE STUDENTS REGISTERED BY TYPE OF TNE ACTIVITY, 2014–15

Source: Analysis of HESA Aggregate Offshore Record 2014–15.

Case Study

LIVERPOOL ONLINE

Liverpool Online is a partnership between University of Liverpool and Laureate Online Education that delivers wholly online postgraduate programmes to mid-career working professionals.

IN PARTNERSHIP SINCE 2004

There are currently 8,500 students studying in 150 countries with 17% of those students coming from GCC and the Middle East. The partnership with Laureate goes back to 2004 and to date has graduated around 10,000 students. Liverpool Online offers 29 Master's Programmes in management, health, computer science, law and psychology as well as Doctoral programmes in education and management.

The content, mode of delivery and the student support mechanisms for Liverpool Online courses are identical regardless of where the student is located globally.

However, notable demographic features of the GCC have influenced marketing and recruitment in the region:

- GCC students are younger than the Liverpool Online average;
- there is a much higher proportion of expatriate students and
- management programmes are by far the most popular courses.

Its GCC marketing primarily targets Saudi Arabia and the UAE due to the high value accorded to UK higher education qualifications in those countries and the large number of expatriates who recognise the Liverpool brand. In addition, the UAE government has recently recognised the Association to Advance Collegiate Schools of Business (AACSB) accreditation that is held by its Management programmes.

STUDENT GROUPS

Liverpool Online recognises and markets differently to three different student groups in the GCC: male nationals; female nationals (a specific interest group for online learning); and expatriates (mainly from Western countries, India, Pakistan and the wider Middle East region). It is particularly targeting female GCC student enrolment at present to address a gender imbalance in the region – where currently only 33% of its students are women. This drops to just 22% in Saudi Arabia. To help focus marketing activity it is using demographic data from the current student cohort to create example 'student personas'.

The partnership model has evolved over time; now Laureate provides finance, operating and marketing capabilities while Liverpool provides brand, academic vision, programme development and quality assurance. There are robust governance arrangements in place combining input from the senior academics (operational leadership and online faculty) and the senior management team (strategic direction).

The partnership has enabled Liverpool to build up quality delivery at scale and Liverpool Online has been highly successful in building the university's brand internationally. Being innovators in online learning has also supported the development of technology-enhanced learning capabilities for the University of Liverpool's campus-based students.

UK TNE ACTIVITY BY GCC COUNTRY

In addition to strong variation of UK TNE delivery type by country, particularly in countries where TNE provision is dominated by distance or online provision, TNE students tend to be highly concentrated in a small number of HEIs. The number of institutions that are most active in TNE – with more than 100 students registered – in each of the GCC states ranges widely, from three providers in Bahrain and Kuwait, to 12 in Oman.

TABLE 6: NUMBER OF PROVIDERS ACTIVE IN TNE AND PERCENTAGE OF TNE STUDENTS BY GCC COUNTRY, 2014–15

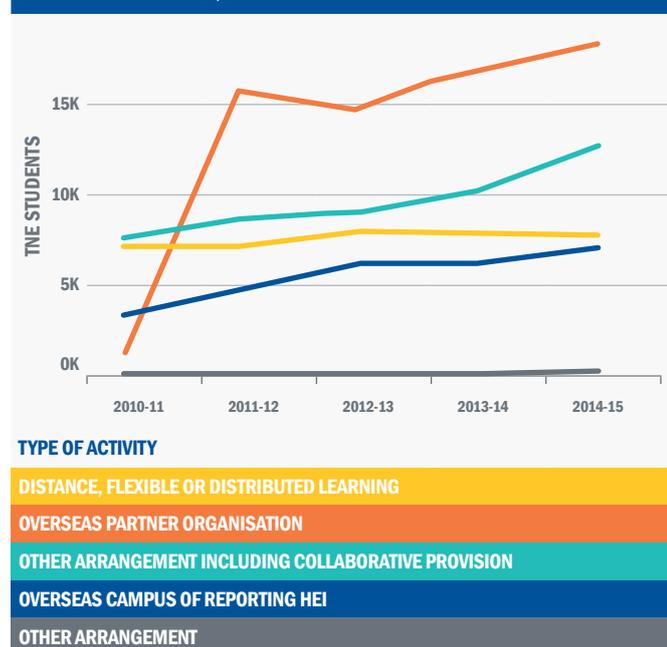
	NUMBER OF HEIs ACTIVE IN TNE*	TNE STUDENTS (%)**
UAE	37	25.3
Oman	20	37.4
Saudi Arabia	17	16
Qatar	16	3.4
Bahrain	9	3.9
Kuwait	9	13.8

Source: Analysis of HESA Aggregate Offshore Record.

*Note: HEIs with more than 20 TNE students in that country.

**Note: Analysis excludes Oxford Brookes University.

FIGURE 22: GCC STUDENTS REGISTERED ON UK TNE PROGRAMMES BY TYPES OF ACTIVITY, 2010–11 TO 2014–15



Source: HESA Aggregate Offshore Record 2010–11 to 2014–15.

Analysis excludes Oxford Brookes University.

Note: HESA uses the term higher education provider (HEP).

‘Distance and online learning accounts for half, if not more, of the TNE provision in the GCC countries.’

Figure 22 shows the largest type of activity is TNE students registered at overseas partner organisations, which makes up 40% of UK TNE activity in the GCC in 2014–15. It is worth noting most of the provision reported as ‘overseas partner organisations’ is distance learning education delivered with local partners. Combined with the HESA category ‘distance, flexible or distributed learning’ (17%), distance and online learning accounts for half, if not more, of the TNE provision in the GCC countries. The second largest type of activity is ‘other arrangements including collaborative provision’ (28%), followed by students studying at the overseas campus of a reporting higher education provider (15%).

The two largest models of TNE delivery are ‘overseas partner organisations’ and ‘other arrangements including collaborative provision’, with 18,600 and 13,155 students respectively, followed by ‘distance, flexible and distributed learning’ (7,790 students) and ‘overseas campus of reporting higher education providers’ (7,510 students).

As noted, the GCC countries with the highest overall number of UK TNE student enrolments in 2014–15 are Oman (17,710) and the UAE (11,990), followed by Saudi Arabia (7,580) and Kuwait (6,545). Bahrain and Qatar have fewer TNE enrolments: 1,870 and 1,610 respectively in 2014–15.

The highest concentration of students per HEI for ‘other arrangements including collaborative provision’ is Oman (11,550 students, provided by 10 UK HEIs), followed by ‘overseas partner organisations’ in Kuwait, Saudi Arabia and Oman with around 5,000 to 6,000 students in each of these countries (with a small number of UK HEIs being the key players).

TABLE 7: NUMBER OF TNE STUDENTS BY TYPE OF TNE ACTIVITY AND COUNTRY, 2014–15

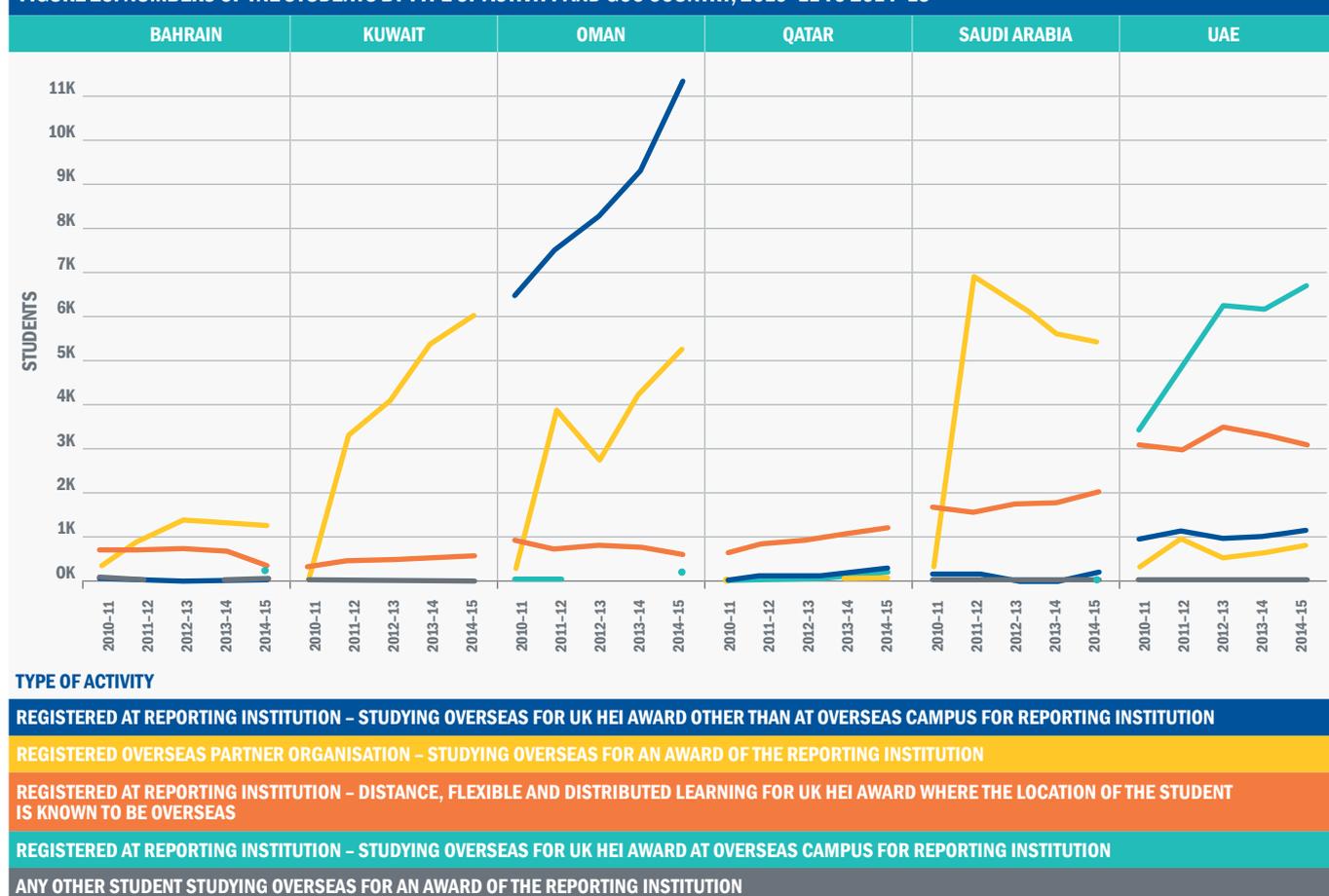
COUNTRY	OVERSEAS PARTNER ORGANISATION	DISTANCE, FLEXIBLE OR DISTRIBUTED LEARNING	OTHER ARRANGEMENT INCLUDING COLLABORATIVE PROVISION	OVERSEAS CAMPUS OF REPORTING HEI	OTHER ARRANGEMENT	GRAND TOTAL
Bahrain	1,240	360	5	215	50	1,870
Kuwait	5,945	585	10	-	0	6,545
Oman	5,210	600	11,550	170	185	17,710
Qatar	50	1,155	270	130	5	1,610
Saudi Arabia	5,395	1,995	180	5	5	7,580
UAE	760	3,095	1,140	6,995	0	11,990
Grand total	18,600	7,790	13,155	7,510	245	47,295

Source: HESA Aggregate Offshore Record 2014–15.
 Note: Analysis excludes Oxford Brookes University.

Figure 23 shows that the proportion of TNE students registered with ‘overseas partner organisations’ is largest in Saudi Arabia, Kuwait, and Bahrain and second largest in Oman.

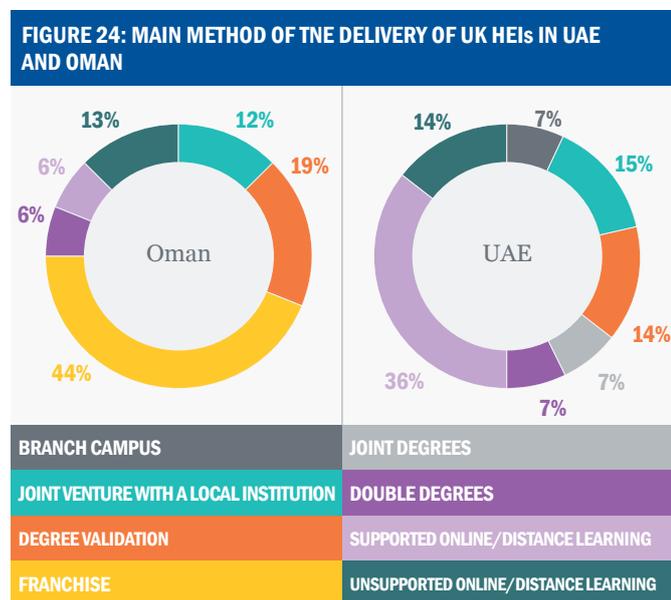
In Oman, the majority of UK TNE students are recorded under the HESA category ‘other arrangement, including collaborative provision’. In the UAE, ‘overseas campus of reporting provider’ is the most popular arrangement, followed by distance, flexible or distributed learning.

FIGURE 23: NUMBERS OF TNE STUDENTS BY TYPE OF ACTIVITY AND GCC COUNTRY, 2010–11 TO 2014–15



Source: Analysis of HESA Aggregate Offshore Record 2010-11 – 2014-15.
 Note: Analysis excludes Oxford Brookes University.

UUKi survey data provided further insight into the types of TNE provision delivered across the GCC region, beyond the broad categories used in HESA data returns. In line with the HESA Aggregate Offshore Record (AOR), most UK TNE activities are reported as being concentrated in Oman and UAE.



Source: UUKi UK-GCC mapping survey, December 2016.

Franchises dominate UK TNE provision in Oman and Bahrain, whereas joint ventures with local education institutions appear most popular in the UAE and Oman.

Unsupported online and distance learning are delivered across all GCC states. The UAE is the only GCC country where delivery of supported distance and online learning outnumbers unsupported distance and online provision.

UUKi survey data further identified that TNE in the UAE mainly attracts non-national residents and international students from South Asia (particularly India, Pakistan, Bangladesh and Sri Lanka). This contrasts with other GCC states where UK TNE mainly caters to the needs of national students and other GCC nationals.

‘Franchises dominate UK TNE provision in Oman and Bahrain, whereas joint ventures with local education institutions appear most popular in the UAE and Oman.’

Case Study

COVENTRY UNIVERSITY AND MIDDLE EAST COLLEGE (OMAN)

Formerly Middle East College of Information Technology, Middle East College (MEC) is a leading higher education institution in Muscat, Oman, established in 2002 as the country's first technology college.

MEC HAS BEEN WORKING IN PARTNERSHIP WITH COVENTRY UNIVERSITY TO OFFER COLLABORATIVE PROGRAMMES SINCE 2006.

Of a total 5,000 students studying at MEC, over 3,000 are enrolled on Coventry validated programmes focused on engineering, computing and technology subjects. Academic link tutors and external examiners travel to Muscat five times a year for quality assurance activities and examination boards. Coventry academics also contribute to the delivery of a number of postgraduate modules on a flying faculty basis.

MEC is approved as a College, as defined under the Oman Government's Standards for Quality Assurance in Higher Education in the Sultanate of Oman. All awards are required to adhere to the Oman National Qualifications Framework (ONQF). Programmes validated by Coventry are required to comply with the Ministry of Higher Education approval process before being offered in Oman.

There are at least two visits a year to Coventry by MEC staff to participate in academic and professional services development activity.

MEC places strong emphasis on staff development and regularly enrolls new members of academic staff on the Coventry University Postgraduate Certificate in Higher Education Professional Practice, delivered by Coventry's Organisational Development team in Oman. There are at least two visits a year to Coventry by MEC staff to participate in academic and professional services development activity. A number of MEC academics are also developing research in collaboration with Coventry.

Case Study

COVENTRY UNIVERSITY AND EMIRATES AVIATION UNIVERSITY (UAE)

Emirates Aviation University (EAU) was established in 1991 by the UAE Department of Civil Aviation, initially as a college providing aviation-related training to private students and corporate clients.

A PLATFORM FOR SUCCESSFUL AVIATION CAREERS

The university aims to give graduates a platform to launch successful careers in aeronautical engineering, aviation management, business management, and aviation safety and security studies.

EAU has been an established partner of Coventry University since 2006. The university has a core of full-time academic staff, the majority of whom hold a PhD, postgraduate degree or equivalent qualification. Additionally, most academic staff instructing on aviation-related specialisations hold approved aerospace maintenance licenses. Coventry academics contribute directly to teaching by delivering some block modules on a flying faculty basis. In January 2015 the university moved from Al Garhood, near Dubai International Airport, to a new campus located in Dubai International Academic City which will incorporate residential accommodation for 300 students.

In January 2015 the university moved from Al Garhood, near Dubai International Airport, to a new campus located in Dubai International Academic City which will incorporate residential accommodation for 300 students.

Courses delivered by EAU in partnership with Coventry University range from postgraduate programmes in aerospace engineering, aviation management and logistics through to undergraduate programmes focused on aerospace technology, air transport management and aircraft maintenance. There are currently 27 approved joint programmes active, with enrolled numbers approaching 500 students. All such programmes are accredited and approved by the QAA, the National Qualifications Authority, the Knowledge and Human Development Authority and the Ministry of Higher Education and Scientific Research.

Since its foundation, EAU has produced nearly 15,000 graduates. These graduates are now working in fields including:

- Aviation security
- Aviation safety
- Human resource management
- Human resource development
- Aviation management
- Electronics engineering and computing
- Computing software development
- Business management
- Tourism management.

Case Study

STRATHCLYDE BUSINESS SCHOOL

The University of Strathclyde Business School operates eight international centres, four of which are in GCC locations: Abu Dhabi, Dubai, Bahrain and Oman.

STRATHCLYDE FIRST LAUNCHED ITS MBA PROGRAMME IN THE UAE AND BAHRAIN IN 1995, AND LATER LAUNCHED A CENTRE IN OMAN IN 2001. THE SCHOOL IS TRIPLE ACCREDITED BY AMBA, EQUIS AND AACSB (AND, IN THE UAE, BY THE MINISTRY OF EDUCATION).

The university's MBA programme is delivered via its international centres on a part-time, executive MBA basis, whereby Strathclyde faculty members travel to the centres to run intensive seminars, with continuous support for students provided by local tutors and centre staff. Students studying via an international centre also have the opportunity to take electives in summer school classes in Glasgow. Successful MBA students studying via international centres are awarded the same University of Strathclyde MBA as the institution's UK-based students.

ABU DHABI AND DUBAI

PARTNERING WITH: Higher Colleges of Technology and the Centre of Excellence for Applied Research and Training (HCT-CERT).

The Strathclyde MBA is offered in Abu Dhabi and Dubai in association with the Higher Colleges of Technology and the Centre of Excellence for Applied Research and Training (HCT-CERT). The Higher Colleges of Technology is one of the largest, most progressive and innovative centres of higher learning in the UAE, with 11 campuses across the country.

BAHRAIN

PARTNERING WITH: BIBF

In Bahrain, the partnership is with BIBF, a semi-governmental training institute affiliated with the Central Bank of Bahrain. BIBF plays a vital role in the training and development of human capital in the Middle East and North Africa.

OMAN

PARTNERING WITH: College of Banking and Financial Studies (CBFS)

Strathclyde's partner in Oman is the College of Banking and Financial Studies (CBFS) – a government organisation established by a Royal Decree in 1983 with the objectives of educating and training bankers and encouraging research in Banking and Financial subjects. It operates under the supervision of the Central Bank of Oman and is supported by the commercial banks operating in the Sultanate.

While the Strathclyde MBA is offered in partnership with local partner institutions, the responsibility for academic quality control resides with Strathclyde. The in-country partner is responsible for promoting the Strathclyde MBA locally, handling enquiries, providing information and receiving applications. To maintain high standards of consistency throughout the world, all admission decisions are made by the University of Strathclyde.

The partner institution provides local administrative services, as well as holding counselling sessions, intensive seminars and examinations. Strathclyde Business School provides core learning materials and sends University of Strathclyde faculty members to each country to run intensive seminars. All assessment is the responsibility of Strathclyde, with successful participants awarded a University of Strathclyde Master of Business Administration.

The in-country partner is responsible for promoting the Strathclyde MBA locally, handling enquiries, providing information and receiving applications. To maintain high standards of consistency throughout the world, all admission decisions are made by the University of Strathclyde.

The sub-sections below take a closer look at Oman and the UAE to examine the regulatory and environmental factors that have been particularly favourable to UK TNE development. Qatar is also briefly examined, providing the perspective of a contrasting incentive framework used to encourage TNE development.

OMAN

With a relatively small population of 4.4 million people, Oman has the highest concentration of UK TNE students in the GCC, accounting for 37% of the total number. Almost 90% of Omani students (17,710 students) enrolled on UK programmes are based outside the UK. Strikingly, only five UK HEIs hold 82% of the UK TNE market share in Oman (15,670 students out of total 17,710).

Oman has the highest concentration of UK TNE students in the GCC with

37.0%

of the total number

Oman has a supportive regulatory framework which has enabled TNE to thrive. Royal Decree 67/2000 regulates private HEIs and encourages them to forge academic affiliations with reputable overseas HEIs. The Ministry of Higher Education has published agreements which detail guidelines on preferred formats for partnership arrangements²⁰ between local and overseas HEIs. To improve the quality of domestic provision, government support for private HEIs includes 'land grant, certain customs exemptions; as well as, for private universities, a matching grant of 50% of capital contribution to a maximum amount of RO three million'²¹.

Widening access to higher education is a key driver for the development of TNE in Oman; roughly 80% of students studying at private HEIs are government-funded²². This figure includes students enrolled on collaborative programmes.

The HESA AOR indicates that most UK TNE in Oman is delivered in partnership between UK and local HEIs. Recent increases in private HEI enrollment, combined with incentives for the private higher education sector to forge collaborations with overseas HEIs may be one of the driving factors behind annual growth in TNE provision. The latest data on student enrolments at private HEIs, published by the Omani Ministry of Higher Education, reports 61,957 students in 2013–14²³. HESA AOR data shows that 15,490 Omani students are enrolled on UK TNE; that is, a fifth of all students enrolled in private HEIs in Oman are enrolled in UK courses.

QATAR

Jane Knight (2015), in her work on education hubs, explores initiatives used by the UAE and Qatar to incentivise TNE operations – specifically, international branch campuses (IBCs)²⁴. The environment in Qatar is highly selective, with Qatari government agencies favouring highly-ranked universities. These selected HEIs are sponsored to set up operations in the country, with significant financial backing provided by the Qatari government.

'TNE is identified by Qatari authorities as a means to increase local access to high quality education provision.'

The British Council 2013 report, *The shape of things to come*²⁵, identified Qatar as providing one of the most supportive environments for TNE globally. Qatar is one of the world's wealthiest countries, yet has a low participation rate in tertiary education (13.6%) when compared with other GCC states and to high-income countries. Qatar has adopted a targeted approach to the development of international branch campuses, whereby particular programmes deemed to contribute to the country's national developmental priorities are actively encouraged. TNE is identified by Qatari authorities as a means to increase local access to high quality education provision.

The Qatar Foundation for Education, Science and Community Development is the key body²⁶ overseeing TNE. The Qatar Foundation is also responsible for the development of 'Education City' which hosts 11 IBCs²⁷.

Qatar has a low participation rate in tertiary education of

13.6%

when compared with other GCC states and to high-income countries

UAE

The GCC country with the second highest number of UK TNE enrolments is the UAE. The TNE delivered in the country accounts for a quarter of the total UK higher education provision in the GCC region. TNE is concentrated in Dubai and is dominated by international branch campuses (IBCs), which deliver 58% of the overall TNE programmes in the country.

Recent research by the Observatory on Borderless Higher Education (OBHE)²⁸ established that the UAE is the second most popular location for global IBCs after China (China has 32 IBCs; the UAE has 31). However, when one considers the relative populations of the two countries the UAE's dominant position in TNE provision is striking: the UAE has one branch campus per 300,000 people, whereas in China the ratio is one branch campus per 41 million people, positioning the UAE amongst the countries with the highest count of branch campuses per capita globally.

TNE is concentrated in Dubai and is dominated by international branch campuses (IBCs), which deliver

58.0%

of the overall TNE programmes in the country

Most of the TNE provision in the UAE is concentrated in Dubai and is regulated by the Knowledge and Human Development Authority (KHDA)²⁹. The agency is one of the founding members of the Quality Beyond Boundaries Group, which brings quality assurance agencies from seven countries and territories (the UK, Australia, Hong Kong, the US, Dubai, Singapore and Malaysia) to collaborate, share information and best practice, and to streamline regulatory oversight associated with the growth in TNE provision, and drive improved cost efficiencies³⁰.

KHDA provides a supportive regulatory environment and infrastructure conducive to the expansion of TNE. Located in special economic free trade zones³¹, international branch campuses operated by overseas HEIs account for 60% of all HEIs in Dubai. While Dubai International Academic City hosts many overseas HEIs³², TNE provision is also found in other specialised economic zones such as Dubai Healthcare City³³ and Dubai Knowledge Park³⁴.

'The GCC country with the second highest number of UK TNE enrolments is the UAE.'

Case Study

HERIOT-WATT UNIVERSITY

Heriot-Watt University (HWU) is a specialist international institution with around 9,000 students in the UK and 32,000 students worldwide studying at campuses in Dubai and Malaysia, with the university's academic partners, and as independent distance learners studying for postgraduate programmes.

ESTABLISHED SINCE 2005

In 2005, HWU established its Dubai Campus in Dubai International Academic City. Welcomed by the Dubai authorities for its focus on engineering and programmes relevant to the economic development goals of the region, Heriot-Watt Dubai now has 3,750 students spanning foundation to postgraduate level, and over 156 staff.

Many of these students have come to university to acquire a higher degree, studying and working in the evenings and weekends whilst still progressing their careers. The skills and knowledge acquired by students enable them to become more productive, successful employees.

LIFETIME PRODUCTIVITY GAINS

One of the most significant impacts is the lifetime productivity gains from each cohort of graduates from the university. This is estimated to contribute over £100 million in Dubai. The university has many alumni in the region and a high percentage stay in the UAE to work after graduating. This kind of contribution to the economy continues to build over time, making a lasting impact.

Student spending is estimated to make a contribution to the economy of circa £44 million and 581 jobs in the UAE.

CELEBRATING 10 YEARS

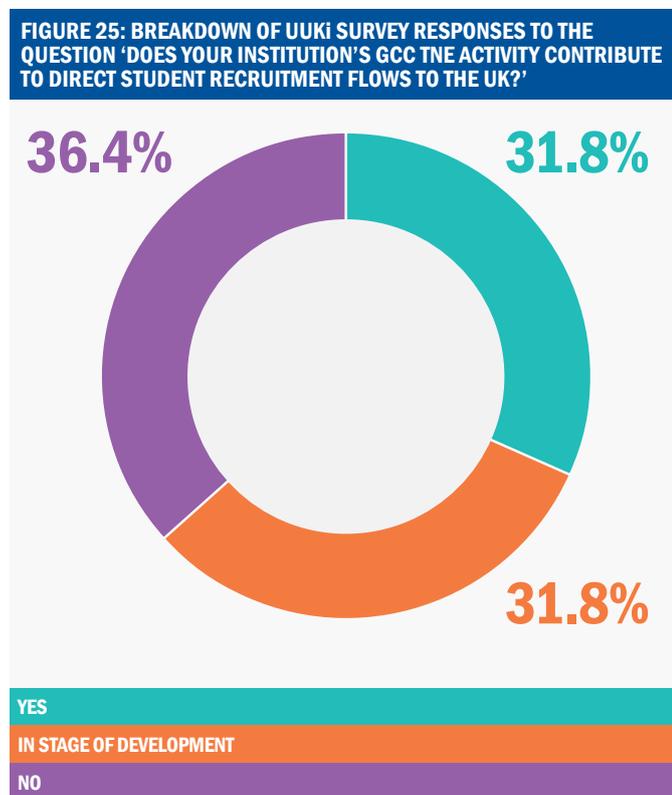
To mark a decade since the foundation of HWU Dubai, the university commissioned a report to examine the positive economic impact of the HWU campus in Dubai and the UAE, based on the 2014–15 year, identifying a total annual economic impact valued at £94 million.

The primary benefits identified as follows:

- Direct employment, spending by employees on goods and services and capital investments – a contribution to the economy of circa £43 million and 518 jobs in the UAE, the majority in Dubai;
- Student spending is estimated to make a contribution to the economy of circa £44 million and 581 jobs in the UAE;
- The tourism and travel impact of students, staff, friends and family attending university and related events were estimated to contribute £6.4 million and 116 jobs.

UK TNE IN THE GCC AS A ROUTE TO STUDY IN THE UK

Almost one third (32%) of the UK HEIs surveyed reported that their TNE programmes contribute to their international student recruitment for study in the UK. Another 32% stated they are actively working towards using their TNE programmes in this way.

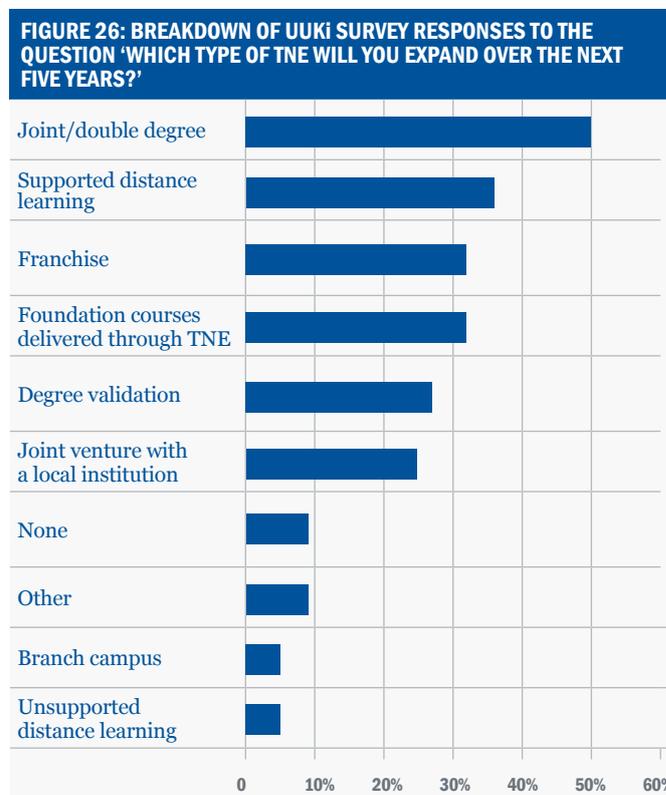


Source: UUKi UK-GCC Mapping survey, December 2016.

The highest progression rate from TNE to subsequent enrolment for study in the UK is found in Oman and the UAE. Growth in student enrolments to the UK has been most concentrated in Oman. A very small number of UK HEIs reported TNE programmes in Bahrain and Qatar leading on to studies in the UK.

FUTURE PLANS

Half of the UK HEIs surveyed plan to expand the provision of joint or double degree courses in the GCC over the next five years. Survey respondents also reported plans to expand supported distance and online learning (36%), foundation programmes delivered through TNE in country and franchises (32% each).



Source: UUKi UK-GCC mapping survey, December 2016.

Follow-up interviews and free text responses provided in the survey suggest that foundation programmes delivered overseas provide a pipeline leading to undergraduate enrolments in the UK. Similarly, pre-masters programmes and top-up undergraduate degrees delivered overseas were reported as a pipeline leading to enrolments at postgraduate level in the UK. A few HEIs reported franchise arrangements in Oman leading to students articulating onto UK programmes. Joint degrees in the UAE and Saudi Arabia were also reported as contributing to enrolments on postgraduate programmes in the UK.

5.3 SECTION SUMMARY

UK TNE performs strongly across the GCC region overall. The countries with the highest concentration of offshore programmes are Oman and the UAE. There are many more students from these countries studying on UK programmes delivered in the GCC than there are studying in the UK.

The UAE has one of the highest proportion of third country nationals as a component of total population in the world, with implications for UK HEIs' TNE strategies. The UK is a popular study destination for UAE students, with 36% global market share. UK HEIs responding to the UUKi UK-GCC mapping survey reported that most UK TNE students in the UAE were South Asian nationals (both non-national residents of the UAE and inbound international students), particularly students from India, Pakistan, Sri Lanka and Bangladesh. This finding resonates with UAE government goals to position the UAE as an international education hub.

The UK is a popular study destination for UAE students, with

36%

global market share

There is significant variation in the type of UK TNE provided across the GCC countries. In some locations activity is highly concentrated around just a few UK HEIs. However in Oman and the UAE, TNE enrolments are more evenly distributed across a range of UK institutions. The most uneven distribution of students was found in countries where a majority of students study on distance and online courses, as is the case for UK provision in Bahrain, Kuwait and Saudi Arabia.

32%

of the UK HEIs active in the GCC region use their TNE provision as a pipeline to subsequent student recruitment to the UK

GCC region use their TNE provision as a pipeline to subsequent student recruitment to the UK. The highest rate of growth in TNE students articulating onto courses delivered in the UK was reported in reference to Oman. A further 32% of respondents plan to expand their TNE provision to include some form of study in the UK as part of their programmes. Forms of TNE provision which respondents intend to expand in future include double and joint degrees, supported distance learning, foundation programmes and franchises. Respondents to the UUKi survey reported that, distance learning aside, these models of TNE are all to some degree contributors to subsequent enrolments for study in the UK.

6. RESEARCH AND INNOVATION IN THE GCC

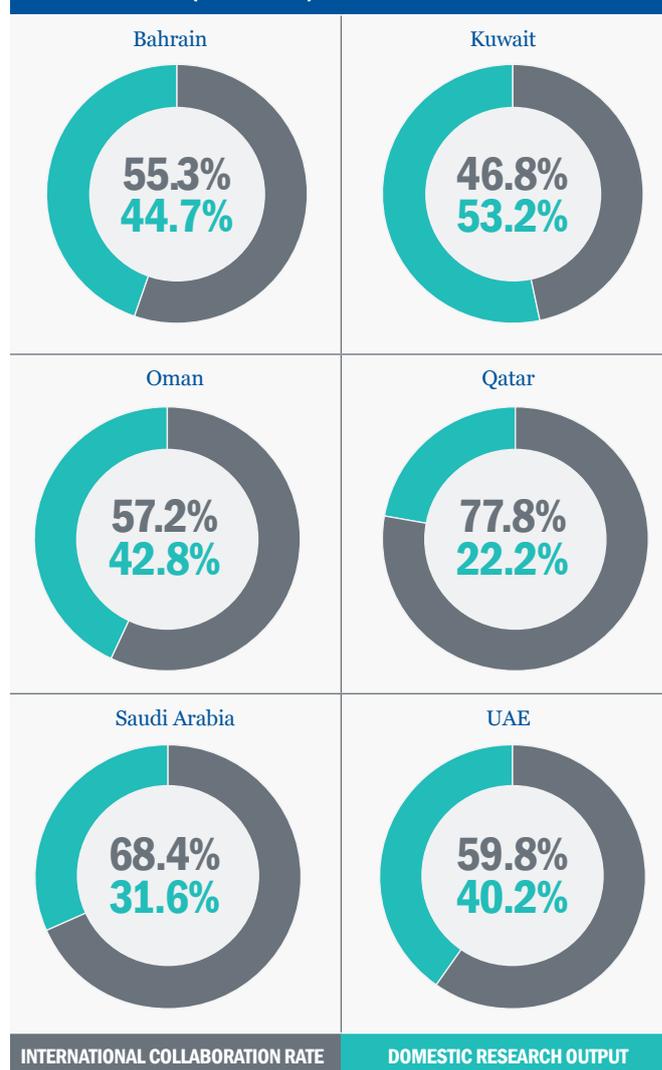
While the US and the UK are important research partners for many of the GCC countries, competition – in terms of quantity and quality of co-authored research – has grown markedly from other locations in recent years, and particularly from Asia.

China's collaboration with selected GCC countries has grown significantly over the period 2011–12 to 2014–15; China is now Qatar's third largest research partner, and the fifth largest research partner for Saudi Arabia. China's collaborative research activity with the GCC appears to be largely focused on these two countries. It is striking that the field weighted citation impact (a measure of research quality) of Chinese research collaborations with Qatar and Saudi Arabia is higher than research produced in collaboration with the US and the UK.

India is another significant research partner for the GCC states. India is currently the most important research partner for Oman and the third most important for Saudi Arabia. With the exception of Kuwait, more than half of the GCC countries' total research output is produced through international collaborations (see Table 8). GCC countries with a higher international collaboration rate also show a higher total research output. The percentage of research carried out with an international partner is 59.8% in the UAE, 68.4% for Saudi Arabia, and 77.88% in Qatar.

'China's collaboration with selected GCC countries has grown significantly over the period 2011–12 to 2014–15.'

FIGURE 27: INTERNATIONAL RESEARCH COLLABORATIONS ACROSS THE GCC NATIONS (2011–2015)



Source: British Council analysis of data from SciVal® database, Elsevier B.V. <http://www.scival.com> (downloaded on 01 December 2016).

TABLE 8: INTERNATIONAL RESEARCH COLLABORATIONS ACROSS THE GCC REGION (2011 - 2015)

	BAHRAIN	KUWAIT	OMAN	QATAR	SAUDI ARABIA	UAE
Co-authored publications (total)	978	2,982	3,658	7,631	49,517	10,058
Co-authored publications (% of total)	55.30	46.80	57.20	77.80	68.40	59.80
MAIN CO-AUTHORS						
Co-authored with US	142	886	518	2,633	9,471	2,865
FWCI with US	6.1	1.53	2.88	2.13	2.56	1.89
Co-authored with UK	138	392	495	1,178	4,275	1,374
FWCI with UK	5.9	1.79	2.97	2.94	2.8	2.08
Co-authored with China	-	117	-	747	4,054	411
FWCI with China	-	3.96	-	3.81	3.58	3.6
Co-authored with India	121	243	619	318	4,567	589
FWCI with India	6.9	-	2.13	4.93	1.9	2.37
Co-authored with Saudi Arabia	201	264	353	622	-	543
FWCI with Saudi Arabia	4.5	1.36	3.25	3.32	-	2.22
Co-authored with Egypt	91	463	236	670	11,108	590
FWCI with Egypt	-	0.91	4.41	2.55	0.97	2.07
Co-authored with Canada	-	293	215	701	3,336	1,196
FWCI with Canada	-	1.99	4.46	3.03	2.57	2.18

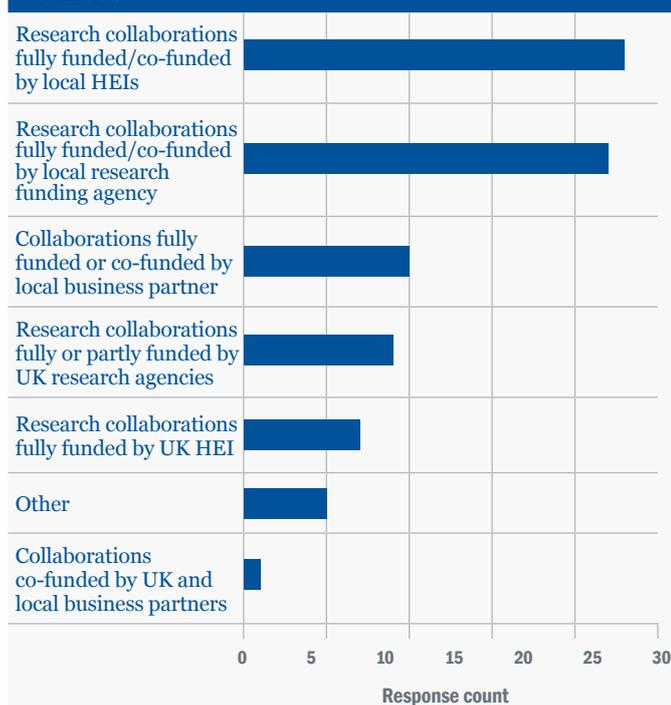
Source: British Council analysis of data from SciVal® database, Elsevier B.V. <http://www.scival.com> (downloaded on 01 December 2016).

As part of UUKi's UK-GCC mapping survey, UK HEIs were consulted on the sources and types of funding used to support collaborative research activity in the GCC countries.

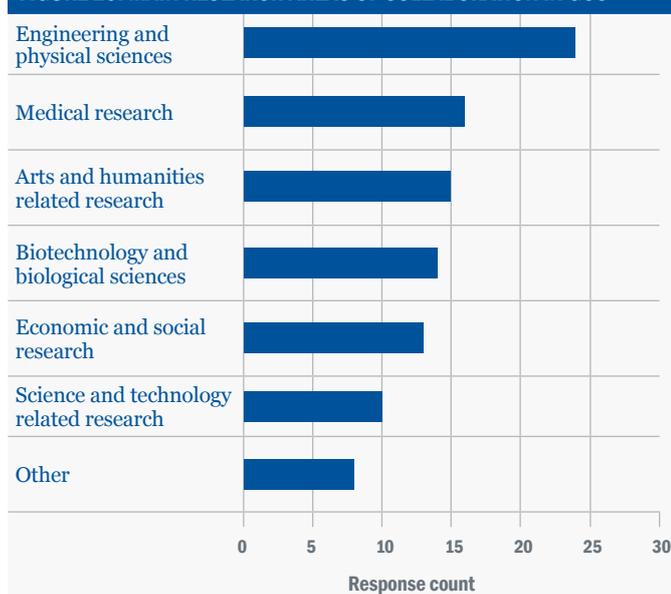
Analysis of UUKi survey data showed that the primary source of funding for UK-GCC research collaborations is local partners in the GCC. From among the 31 surveyed HEIs who are research active in the GCC, 74% (23 HEIs) reported participating in research collaborations funded by local education institutions, 71% (22 HEIs) reported receiving funding from local research funding agencies, and 32% (10 HEIs) reported securing funding from local business partners.

A lesser proportion of research carried out in the region is funded by UK partners. From among the 31 surveyed HEIs who are research active, 30% (nine HEIs) reported receiving funding from UK agencies, and 23% (seven HEIs) drew on internal institutional funds to support collaborative research projects.

'Saudi Arabia and Qatar were identified by survey respondents as the GCC countries where the most funding had been secured for UK research partnerships.'

FIGURE 28: SOURCES OF FUNDING FOR UK RESEARCH ENGAGEMENT IN THE GCC

Source: UUKi UK-GCC mapping survey, December 2016.

FIGURE 29: MAIN RESEARCH AREAS OF COLLABORATION IN GCC

Source: UUKi UK-GCC mapping survey, December 2016.

Saudi Arabia and Qatar were identified by survey respondents as the GCC countries where the most funding had been secured for UK research partnerships. The research areas in which UK HEIs have secured most funding are engineering and physical sciences, followed by medical research and biotechnology and biological sciences.

A major consideration regarding research engagement in the GCC region is the heightened importance placed on research and innovation by GCC governments as an engine of economic development, particularly Saudi Arabia and the UAE. As a key pillar in national strategies for economic diversification, both countries have committed to significantly increase their contribution to the research and development (R&D) spend³⁵. Research ambitions are also detailed in the GCC countries' various national economic plans.

GCC countries already demonstrate very high rates of international research collaboration. In line with the GCC states' national economic strategies, it may be expected that the volume and intensity of research collaboration in the region will increase in the medium to long-term.

Case Study

MUSCAT UNIVERSITY, CRANFIELD UNIVERSITY AND ASTON UNIVERSITY

Muscat University was established in 2016 with a vision to produce a pipeline of future leaders for Oman and the region, combining academic rigour with the world of work, and with a strong commitment to innovation and entrepreneurship.

THE UNIVERSITY IS A CORPORATE SOCIAL RESPONSIBILITY INITIATIVE LED BY 37 LEADING OMANI INDIVIDUALS, FAMILIES AND BUSINESSES, WITH A CLEAR FOCUS ON QUALITY OF PROVISION, AND WITH A GOAL TO CONTRIBUTE TO CLOSING THE GAP BETWEEN INDUSTRY AND HIGHER EDUCATION IN THE GULF REGION.

Partnering with two UK universities that are highly ranked for graduate outcomes and with strong links to industry supports this aim, and ensures that quality is embedded from the outset.

As of September 2017, Muscat University will offer nine joint programmes across three faculties:

- Engineering and technology;
- Business and management; and
- Transport and logistics.

Cranfield University is partnering with Muscat University to provide six postgraduate programmes and Aston University is partnering to deliver three undergraduate programmes. Students on these joint award programmes will be considered students of both universities (Muscat and Aston, or Muscat and Cranfield), will fall under the UK and Omani quality management mechanisms, and will receive two certificates upon graduation.

One of the missions of Muscat University is to develop local capacity and, as such, programme delivery will predominantly use the flying faculty model and locally-based supervisory support in the first instance, with the reliance on flying faculty reducing from 90% in the early years to 60% as the university develops. The three parties will work together to support faculty professional development on an ongoing basis.

At the macro-level, one of the biggest challenges in establishing the partnerships has been aligning different governance structures to allow for the delivery of the same programme, with the same award, in two different institutions and locations. The use of high-level steering committees, which meet on a regular basis, has ensured that the three institutions' vision remains closely aligned.

At the operational level, challenges have included initial contractual agreements including governing laws; understanding cultural norms and expectations; aligning IT systems and delivery schedules; and accommodating varying and fluctuating public holidays. The partners identify the use of project champions across the three universities, and a commitment to frequent and frank communication at all levels, as important factors underpinning successes to date, and as critical to future success.

There has been huge interest from local and international staff in Muscat University. In a recent recruitment campaign, 1,280 applications were received for three posts advertised. A high volume of student applications have been received for the September 2017 first intake, while local industry has enthusiastically welcomed the opportunity to work with internationally-recognised UK universities on their home turf. Research opportunities have surfaced both for industry projects as well as for research collaborations across the three institutions. It will be imperative to ensure that these are nurtured to address the UK impact agenda, as well as the Omani social and economic research priorities set by the government.

In a recent recruitment campaign, 1,280 applications were received for three posts advertised. A high volume of student applications were received for the September 2017 first intake, while local industry has enthusiastically welcomed the opportunity to work with internationally-recognised UK universities on their home turf.

Muscat University provides a platform for Cranfield University and Aston University to work with Muscat's senior management and founders to contribute to the creation of a major new university from the ground up, with a focus on implementing best practice from the outset. The country and region-wide impact of Muscat University will be revisited on a regular basis over time.

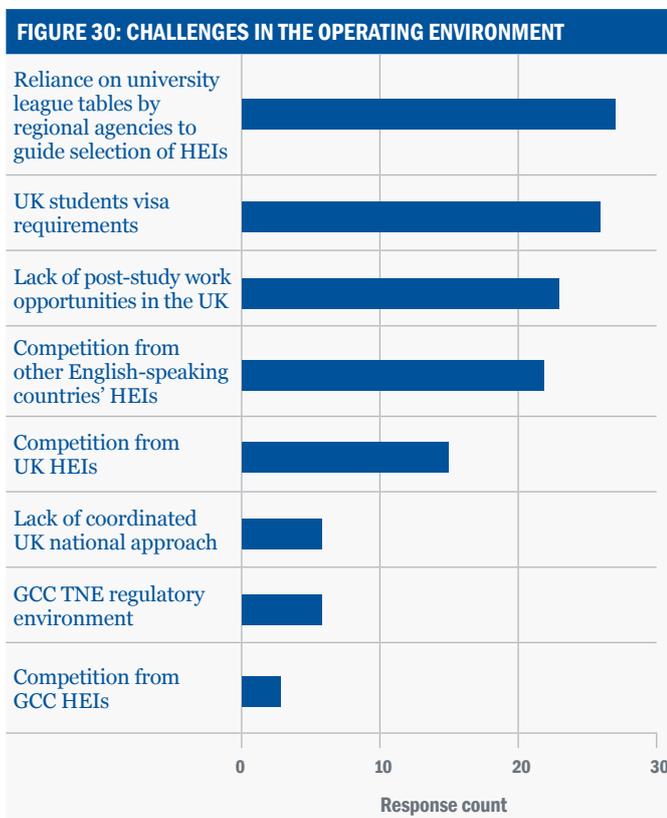
7. ENABLERS, CHALLENGES AND FUTURE UK-GCC COLLABORATION

The UUKi survey invited institutions to identify the principal enablers and challenges for UK-GCC cooperation in higher education, research and innovation, with reference to the general operating environment and to the relevant policy and regulatory systems in both the UK and GCC.

Figure 30 illustrates the views of respondents to the UUKi sector survey on the main operating challenges they perceive when working in and with the GCC. Regional agencies often rely on global league tables to determine which overseas HEIs are eligible for participation in government-funded or approved programmes, and this can present some challenges. For example, the use of global university league tables in this way can have the effect of obscuring discipline-specific pockets of excellence, as well as small and specialist institutions which may be world-leading in their area of specialisation, meaning that opportunities for valuable and impactful partnerships may be missed.

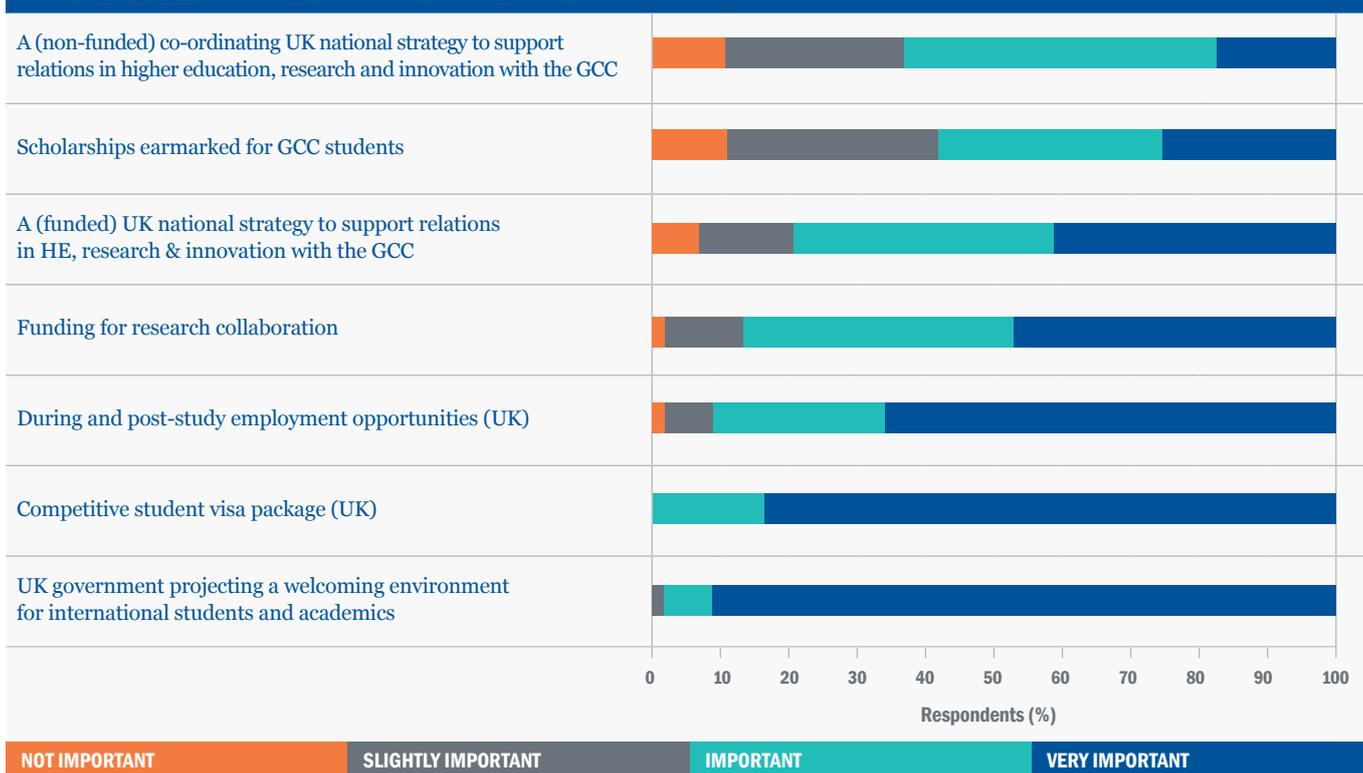
The survey responses also suggest that student visa requirements and post-study work opportunities for international students are perceived by university professionals to be the domestic policy issues most likely to impact on UK-GCC collaboration and engagement.

Survey respondents were also invited to reflect on what might be considered “enablers” of UK-GCC collaboration and engagement. As illustrated in Figure 31, higher education professionals considered the projection of the UK as a welcoming destination for international students and academics to be the most important factor influencing the continued success of UK-GCC collaboration. Respondents also perceived a competitive visa regime for international students, and opportunities to undertake work placements during (and following the completion of) UK-based academic study, as important enabling factors.



Source: UUKi UK-GCC mapping survey, December 2016.

FIGURE 31: ENABLERS FOR UK HEIs' ACTIVITIES IN THE GCC REGION



Source: UUKi UK-GCC mapping survey, December 2016.

UK HEIs were surveyed on their immediate, mid- and long-term strategic priorities in the GCC region. The most frequently cited short-term priorities were international student recruitment and development of TNE, followed by research and partnership development.

Mid-term priorities were reported as focusing on TNE, followed by student recruitment, research and partnership development. Executive education, collaborations and mobility were also mentioned by several HEIs as areas of interest.

When asked to comment on longer-term strategic priorities, respondents emphasised TNE and research collaboration as priority areas. Student recruitment, while still important, drops to third place when taking this longer view, followed by executive education.

‘TNE and research collaboration represent priority areas in the long-term strategic view.’

8. RESEARCH METHODOLOGY

Desk research to inform the GCC mapping report commenced with a review of the existing literature and secondary data on the education, socioeconomic and labour profile of the GCC countries:

The UK higher education sector's comparative position in the wider MENA region, ranked against other major university systems, was established via a statistical analysis of UNESCO Institute for Statistics (UIS) data and complemented by locally sourced data, such as the Institute for International Education Open Doors data (in the case of the US higher education sector).

Time series data illustrating the engagement of UK higher education institutions (HEIs) in the GCC countries are drawn using HESA student records and Aggregate Offshore Records. The published data are rounded to the nearest 0 and 5 in line with the Data protection guidance for the HESA records³⁶.

'An online survey administered by Universities UK International (UUKi) was used to obtain a granular understanding of engagements and activities carried out by UK HEIs in the GCC countries.'

Analysis of UK research engagement in the GCC region is based on analysis of Scopus data, which was carried out in collaboration with the British Council.

An online survey administered by Universities UK International (UUKi) was used to obtain a granular understanding of engagements and activities carried out by UK HEIs in the GCC countries.

Survey questions were drafted and subsequently refined via semi-structured interviews with a representative sample of UK HEIs with substantial activities in the GCC region. The survey was then piloted with a small sample of UK HEIs prior to distribution via UUKi communications networks.

Considerable effort was invested to secure participation in the survey by those UK HEIs with the largest numbers of GCC students enrolled in programmes based in the UK, and on transnational education (TNE) programmes in the region. An institutional level analysis of the HESA Aggregate Offshore records was carried out to identify the UK HEIs most active in delivering TNE in each GCC country, and to identify the range of forms of UK TNE delivery provided across the region.

The online survey was completed by 63 HEIs. These institutions recruit over 70% of the students from GCC countries in the UK and account for over 75% of the UK TNE provision in the region³⁷.

The research methodology is summarised in table 9.

TABLE 9: RESEARCH OBJECTIVES, METHODOLOGY AND DATA SOURCES		
RESEARCH TASK	RESEARCH METHODOLOGY	DATA SOURCES
Establish international demand for higher education in the GCC region and MENA	Literature review and secondary data analysis	UNESCO Institute for Statistics; OECD, World Bank Development Indicators; IMF World Economic Outlook; International Labour Organizationa
UK HE competitor analysis	Statistical analysis based on secondary data UNESCO Institute for Statistics	UNESCO Institute for Statistics
Demand for UK HE from GCC (onshore and TNE)	Statistical analysis based on secondary data	HESA Student Records (various years); HESA Aggregate Offshore Records (various years)
Mapping HE engagement between the UK and GCC (strategy, activities, operations) and identifying challenges and enablers	<ul style="list-style-type: none"> • Semi-structured phone interviews with HEIs active in the GCC region • Online survey administered by UUKi 	<p>Primary data collection</p> <p>Primary data collection</p>
Mapping UK-GCC research collaborations relative to other overseas HE and research systems	Statistical analysis carried out by the British Council	Scopus data

APPENDIX

RESEARCH OUTPUT AND IMPACT IN THE GCC					
YEAR RANGE: 2011 TO 2015	PUBLICATIONS	CITATIONS	AUTHORS	FIELD-WEIGHTED CITATION IMPACT	CITATIONS PER PUBLICATIONS
SAUDI ARABIA	72,910	490,498	39,387	1.28	6.7
UAE	16,945	76,543	10,789	1.11	4.5
QATAR	9,879	54,323	5,264	1.55	5.5
KUWAIT	6,573	27,552	5,750	0.80	4.2
OMAN	6,496	28,055	4,924	0.91	4.3
BAHRAIN	1,852	7,929	1,416	1.04	4.3

Source: British Council analysis of data from SciVal® database, Elsevier B.V. <http://www.scival.com> (downloaded on 01 December 2016).

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- 2 HESA AOR
- 3 UNESCO Institute for Statistics (UIS) data
- 4 UUKi UK-GCC sector survey, December 2016
- 5 UUKi UK-GCC sector survey, December 2016
- 6 The outbound mobility ratio measures the number of students from a given country studying abroad, expressed as a percentage of total tertiary enrolment in that country. Source: UIS <http://uis.unesco.org/en/glossary-term/outbound-mobility-ratio>
- 7 Note: UK market share is calculated based on international student data sourced from UIS which, for methodological reasons, differs from HESA. The latest available data for all data fields is 2013. More up-to-date tertiary enrolment data (2014) are used in later sections of the report
- 8 See British Universities Iraq Consortium website for further details: <http://www.buic.ac.uk>
- 9 Ilieva J and Edwards M (2016) *What's next for the Middle East? Part 1 - Shifting Sands* <https://www.idp.com/unitedkingdom/aboutidp/middle-east-insight>
- 10 'No financial backing' indicates that students pay full tuition fees. It is a category under the field 'Major source of tuition fees', which forms part of the student data collected by HESA. <https://www.hesa.ac.uk/collection/c16051/a/mstufee>
- 11 Source: World Bank data. Note: 'The remittance data is for 2015, disaggregated using host country and origin country incomes, and estimated migrant stocks from 2013' www.worldbank.org/prospects/migrationandremittances
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Estimates for Bahrain are sourced from the International Labour Organisation statistical database. Data were extracted on 13 February 2017
- 17 Source: UNESCO Institute for Statistics data and World Bank World Development Indicators
- 18 Note: Students registered at Oxford Brookes University accounted for over 40% of the total population of the Aggregate Offshore Record in 2014–15. The majority of these students were registered with an overseas partner on Association of Chartered Certified Accountants (ACCA) programmes
- 19 The HESA AOR shows a small number of HEIs active in each of these markets, and that education delivered via distance and online dominates provision reported under 'overseas partner organisation'. As such, distance and online modes of delivery account for the majority of TNE provision in Saudi Arabia, Kuwait and Bahrain.
- 20 For details see: Martin M (2007, p. 168) *Cross-border higher education: regulation, quality assurance and impact: Chile, Oman, Philippines, South Africa*, report produced for UNESCO <http://files.eric.ed.gov/fulltext/ED499623.pdf>
- 21 For details on regulation on private higher education institutions, see Sultanate of Oman Ministry of Higher Education website: <https://mohe.gov.om/InnerPage.aspx?id=30c2284b-7b6d-49c7-be63-2dcf29e48905&culture=en>
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- 30 For details see: <http://www.teqsa.gov.au/about/international-engagement#B>
- 32 Permitting 100% foreign ownership of companies and exemptions to policies such as Emiratisation targets.
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- 36 Data protection guidance for the HESA records; <https://www.hesa.ac.uk/about/regulation/data-protection/guidance>
- 37 The analysis excludes the Open University and Oxford Brookes unless specified otherwise.

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