QAA

COUNTRY REPORT:

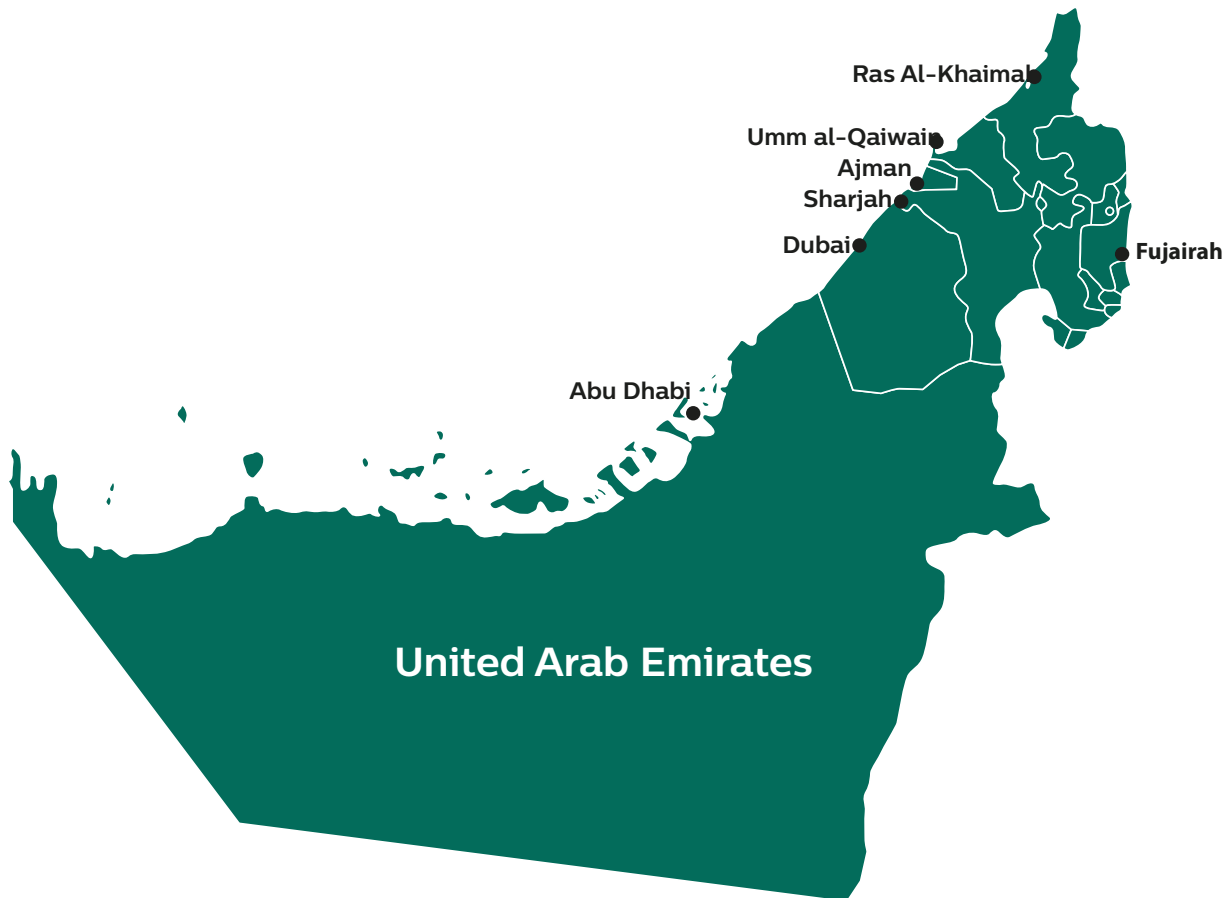The United Arab Emirates

Contents

Introduction

This report is part of a series of country reports that QAA, as part of its contractual arrangement with the four national funding bodies, will regularly produce to offer higher education providers an insight into the higher education and regulatory landscape of key countries for UK transnational education (TNE). The reports offer high level information and intelligence about regulations, challenges and opportunities, signposting to sources of further information. Country reports might also be associated with TNE review activity, in which case they will also include the main lessons learned from reviewing TNE in the subject country, for the benefit of the whole sector.

In producing these reports QAA will seek to liaise with local regulators and quality assurance agencies, and other UK sector bodies with relevant expertise. QAA has a number of strategic partnerships with counterpart agencies in key countries for UK TNE. These are a source of intelligence and direct access to up-to-date information about local regulatory developments.

We would like to thank our partner agencies in the emirates of Dubai (KHDA), Ras Al-Khaimah (RAK Academic Zone Authority), and Abu Dhabi (ADEC), as well as Universities UK International, for their valuable support in developing this report.

The United Arab Emirates

Ras Al-Khaimah

Umm al-Qaiwain

Ajman

Sharjah

Dubai

Fujairah

Abu Dhabi

United Arab Emirates

The United Arab Emirates (UAE) is a federal monarchy in the Middle East made of up of seven emirates. The constituent emirates are Abu Dhabi (which serves as the capital), Ajman, Dubai, Fujairah, Ras Al-Khaimah, Sharjah and Umm Al-Quwain. Each emirate is governed by a monarch; jointly, the seven rulers form the Federal Supreme Council.

In 2014 the UAE's population was 9.2 million. Of these, 1.4 million are Emirati citizens, or nationals, as they are commonly called. Non-national residents currently make up the majority (85–90%) of the total population. They are not eligible for UAE citizenship or other benefits such as free education, which is available to nationals. Expatriates who have lived in the country for more than 20 years, and can speak Arabic, can apply for citizenship. The emirates of Abu Dhabi and Dubai are the most populous, with approximately 2.8 million residents each.

Islam is the official religion of the UAE and Arabic is the official language, although English and Indian dialects are widely spoken, with English being the language of business and education, particularly in Abu Dhabi and Dubai.

Key national policies

Annual data	2016 (a)	Historical averages (%)	2012–16
Population (million)	9.3	Population growth	1.2
GDP (USD billion; market exchange rate)	332.5	Real GDP growth	4.2
GDP (USD billion; purchasing power parity)	667.4	Real domestic demand growth	2.9
GDP per head (USD; market exchange rate)	35,867	Inflation	2.0
GDP per head (USD; purchasing power parity)	71,999	Current account balance (% of GDP)	12.4
Exchange rate (average) GBP:DHS per £1	5.05 (c)	FDI inflows (% of GDP)	2.5
% of third country nationals (approx.)	85 (b)	Not available	Not available
(a) Economist Intelligence Unit estimates			
(b) United Nations			
(c) HM Revenue and Customs			

The UAE is a member of the Gulf Cooperation Council (GCC), a political and economic alliance of six Middle-Eastern countries. The other GCC states are Saudi Arabia, Kuwait, Qatar, Bahrain and Oman. All six GCC states, through a series of 'Vision' strategies, are aiming to diversify their economies away from reliance on oil and gas exports. Moves to increase economic diversity, stimulate private sector employment and entrepreneurship within national populations, and build the national knowledge economy have placed education, research and innovation as a key pillar within the Vision strategies.

In the UAE these goals have been outlined in the Vision 2021 Strategy,[1] which spans environmental regulation, judicial reform and economic diversification, and includes a goal to raise education standards. Vision 2021 focuses on reducing the country's dependence on oil to 20% of its Gross Domestic Product (GDP) by 2021, through the development of a diversified and flexible knowledge-based economy. The UAE is making progress towards this target, with non-oil sectors contributing to 69% of GDP in 2014. In Dubai the non-oil sector contributes 96% of GDP. The sectors currently playing a key role in the diversification of the country's economy are the real estate and business services sector, followed by the transport, storage and other communications sector, which in 2015 received more state investment than the oil and natural gas sector (see Figure 1).

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1   Vision 2021 website, available at: www.vision2021.ae/en (last accessed 10 April 2017).

**Figure 1: UAE investment for economic sector (2015)[2]**
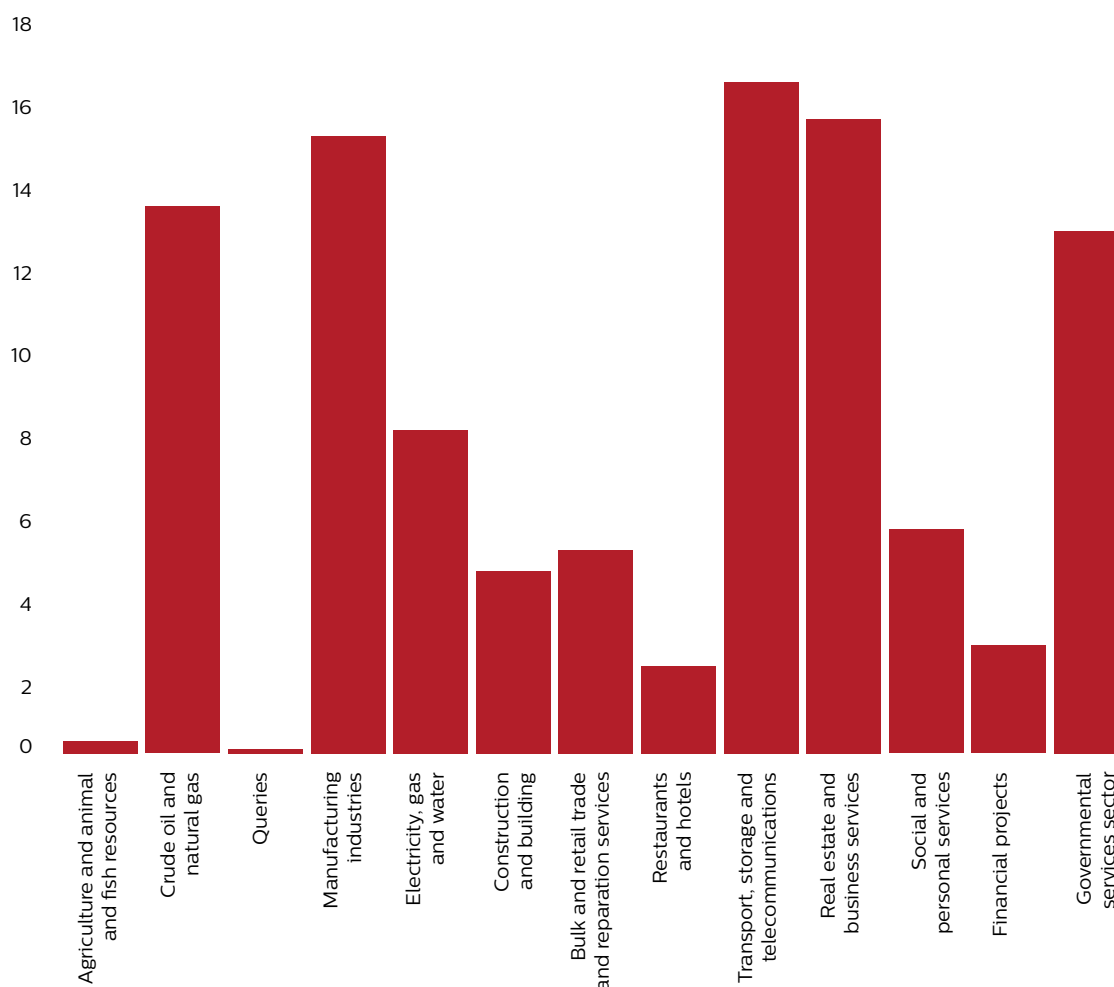
 A key tool for achieving the Vision 2021 is the National Strategy for Innovation launched in 2014 by the UAE Vice President and Prime Minister, His Highness Sheikh Mohammed bin Rashid Al Maktoum.[3] The strategy aims to make the UAE one of the most innovative countries in the world by stimulating innovation in seven key sectors: renewable energy, transport, education, health, technology, water and space. In the field of education the strategy will establish innovation labs in schools and universities as part of a drive to equip students with targeted skills such as critical thinking, problem solving, creativity, perseverance and an ability to adapt.

According to the estimates of the International Labour Organisation, the rate of participation in the labour force in 2014 was about 78.0% of the total population aged 15 years and above, and the unemployment rate was 3.6%. The construction and building sector generates most employment (20%), followed by the wholesale and retail trade and repairing services sector (18.5%), the manufacturing sector (11.6%), and the governmental services sector (11.5%) (see Figure 2). A key part of Vision 2021 is to increase educational attainment and professional employment for UAE nationals. This includes a target for Emiratisation in the private sector of 5% of the workforce by 2021. To support this aim, it is a legal requirement for private businesses with over 50 people to ensure that at least 2% of employees are UAE nationals.

Figure 2: Employment rates by economic sector (2014)[4]
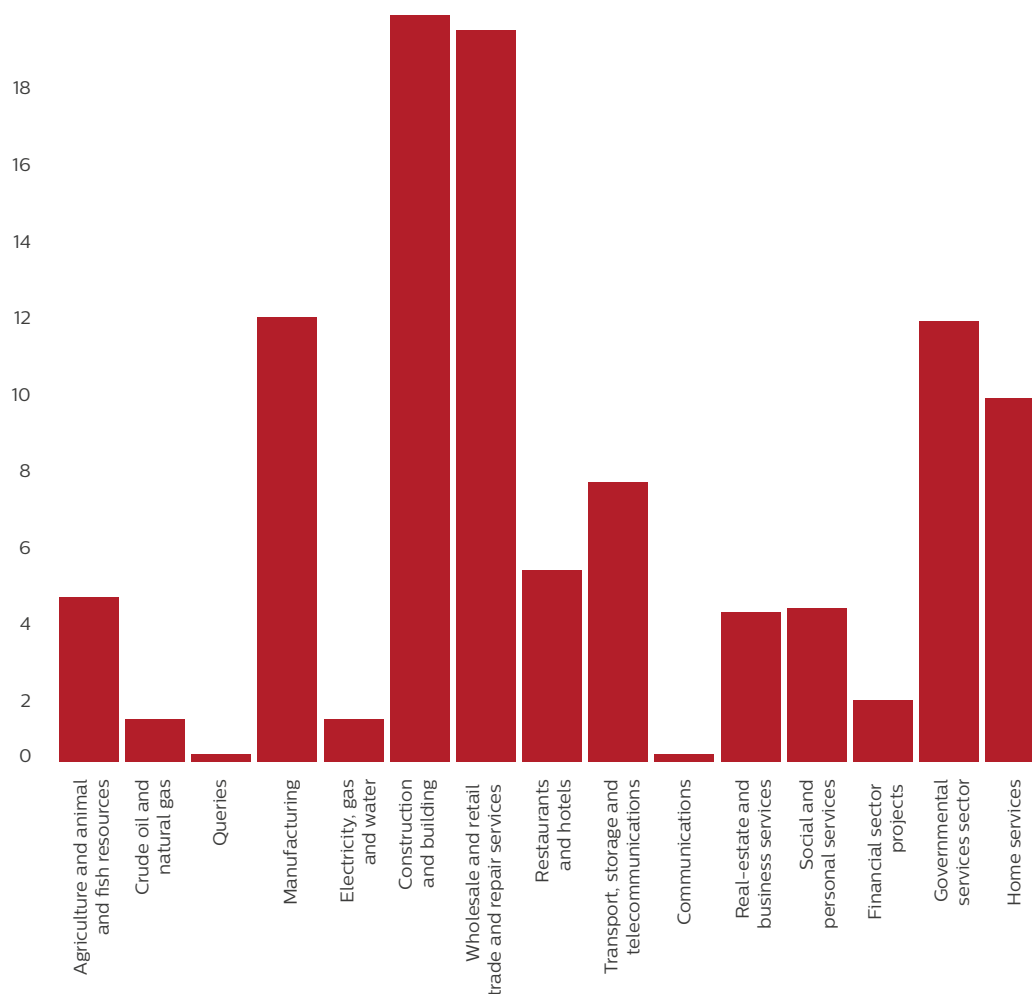
In the 2015 Annual Economic Report, the UAE Ministry of Economy highlighted that, in order to achieve its strategic targets in the transition to a knowledge–based economy that relies on research and innovation, the country should do more to:

- support the role of vocational and technical education, and link its output to the needs of the labour market

- establish research centres and technology incubators to provide an appropriate environment for the success of ideas and innovations, and the expansion of master's and doctoral degrees, especially in the scientific and technical aspects

- link education with development and turn it into a source of research and innovation through spreading universities and technological institutes, the expansion of partnerships with international universities and scientific research institutions, and stimulating people to study in the scientific and technological specialisations in order to support creativity and innovation

- support the establishment of service research institutions that play the role of a mediator between knowledge generation and the private sector to turn scientific research into commercial commodities and services, and to encourage industries and companies to resort to universities and research institutions for providing their needs, and the development, localisation and generation of technology

- establish new economic cities and smart villages to become knowledge cities and attract knowledge industries and innovation centres.

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4   Source: United Arab Emirates Ministry of Economy Annual Economic Report 2016, available at: www.economy.gov.ae/Publications/MOE%20Anual%20Repoert%20English%202016.pdf (PDF, 4.8MB).

The United Arab Emirates higher education landscape

The higher education landscape in the UAE has developed along with the fast economic growth that the country has witnessed over the past 20 years. Its key features reflect the diverse efforts of the federal government and individual emirates to diversify their economy from oil production to other sectors such as finance, retail, tourism and services. They also reflect the necessity to cater for the educational needs of a fast growing population that has doubled over the past 10 years, reaching over nine million, and which includes a large expatriate community accounting for about 85% of the whole population. This growing higher education demand, driven both by population growth and a shift towards a diversified and knowledge-based economy, has been largely met by increasing the number of non-federal institutions, including branch campuses of foreign institutions.

The UAE higher education sector currently comprises over 100 providers enrolling approximately 140,000 students, with tertiary enrolments steadily growing year on year.[5] Three of these providers, the United Arab Emirates University (UAEU), Zayed University, and the Higher Colleges of Technology, are federal government institutions, and operate at national level through branches in different emirates. Each of these institutions offers foundation, bachelor's and master's programmes, with the UAEU additionally offering PhD programmes. They account for about 30% of total student enrolment (about 43,000 students all together) and provide access to higher education primarily to Emirati citizens, who make up more than 90% of the federal student body.

UAEU, established in 1976, operates in Al Ain, the second largest city in Abu Dhabi and the fourth largest city in the UAE, and enrols approximately 11,000 students. Zayed University, established in 1998, operates in Abu Dhabi and Dubai, enrolling approximately 9,000 students. The Higher Colleges of Technology operate 17 campuses in Abu Dhabi, Al Ain, Dubai, Fujairah, Madinat Zayed, Ras Al-Khaimah, Ruwais, and Sharjah, enrolling over 23,000 students.

The other higher education providers are non-federal institutions, also referred to as private institutions, although some may benefit from emirate funding. Private institutions include branch campuses of foreign providers, which cater primarily to the expatriate community, and increasingly to international students from the neighbouring regions. The UAE is a successful higher education hub and one of countries hosting the largest number of international branch campuses in the world. The predominant model of transnational education (TNE) in the UAE is in fact that of branch campus delivery. The main rationale for importing TNE provision is that it allows students to access undiluted quality foreign provision, rather than developing local higher education capacity through collaborative partnerships, as is the case for other main host countries of TNE, such as China, Malaysia and Singapore.

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5   Data refers to academic year 2013–14. Sources:
     www.caa.ae/caa/DesktopModules/InstEnrollment.aspx;
     www.khda.gov.ae/en/publications/article?id=10220;
     www.uaeu.ac.ae/en/flipbooks/annual_report/pdf/annualreport2014_2015.pdf (PDF, 1.85MB);
     www.zu.ac.ae/main//files/contents/open_data/zu_fact_sheet_2015_16.pdf (PDF, 10MB);
     www.hct.ac.ae/en/about.

The definition of 'international branch campus' is a debated one, and there are different models that providers and host country authorities can adopt for establishing a branch campus. The Observatory for Borderless Higher Education (OBHE) has regularly monitored and reported the development of branch campuses over the years. Its latest report, International Branch Campuses: Trends and Developments (2016)[6] adopts the following definition of international branch campus:

> 'an entity that is owned, at least in part, by a foreign education provider; operated in the name of the foreign education provider; and provides an entire academic program, substantially on site, leading to a degree awarded by the foreign education provider'.

On the basis of this definition the UAE hosts 31 international branch campuses, just one less than China, the largest host country. The UAE has therefore the highest concentration of international branch campuses in the world. According to the OBHE report the UK is the main sending country for branch campuses in the UAE with eight providers, followed by the USA and India with six each. These numbers might vary according to the definition of what constitutes an international branch campus. However, the total number of foreign providers operating with a physical presence in the UAE can be regarded as higher than reported by the OBHE. Putting together data from the OBHE report, the Ministry of Higher Education and Scientific Research, and the higher education authorities in the three emirates hosting TNE (Abu Dhabi, Dubai and Ras Al-Khaimah), it is possible to count 41 foreign providers with a physical presence in the UAE, with the UK as the leading sending country with 11 providers (see Figure 3). Annex 1 provides the list of all foreign providers with a physical presence in the UAE, according to this report.

Figure 3: Sending countries of higher education in the UAE

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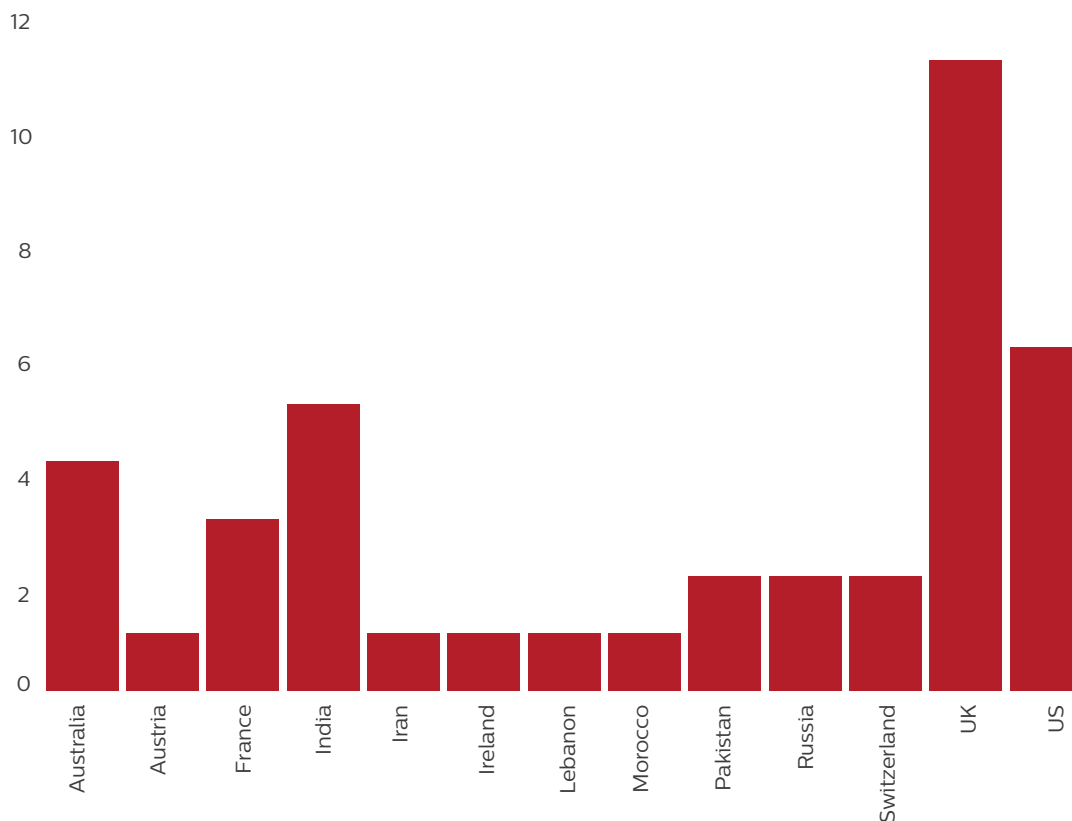
6   The report was developed in partnership with the Cross-Border Education Research Team (C-BERT) at the State University of New York at Albany and Pennsylvania State University, available at: www.obhe.ac.uk/documents/view_details?id=1032.

Most of the foreign higher education operations are located in the free zones established by the emirates of Dubai to attract foreign education providers. Dubai Knowledge Village, a purpose-built zone dedicated to human resources management, and Dubai International Academic City, designated exclusively for higher education institutions, are the free zones hosting the largest number of foreign higher education providers. Other free zones in Dubai, such as the Dubai International Finance Centre and the Dubai Internet City, also host international branch campuses, but fewer in number and providing education only in the focus area of that particular industry zone.

The emirate of Ras Al-Khaimah has also created free zones to promote business and local growth. The Ras Al-Khaimah Free Trade Zone comprises a number of thematic business parks, including one exclusively dedicated to education.[7] The emirate of Abu Dhabi also hosts foreign higher education providers, although it has adopted a different route to branch campus development from that of Dubai and Ras Al-Khaimah, inviting and financially supporting the establishment of branch campuses of foreign institutions without creating free trade zones.[8] Figure 4 provides an overview of the geographical distribution of foreign higher education providers operating in the UAE.

Figure 4: Distribution of foreign providers operating in the UAE
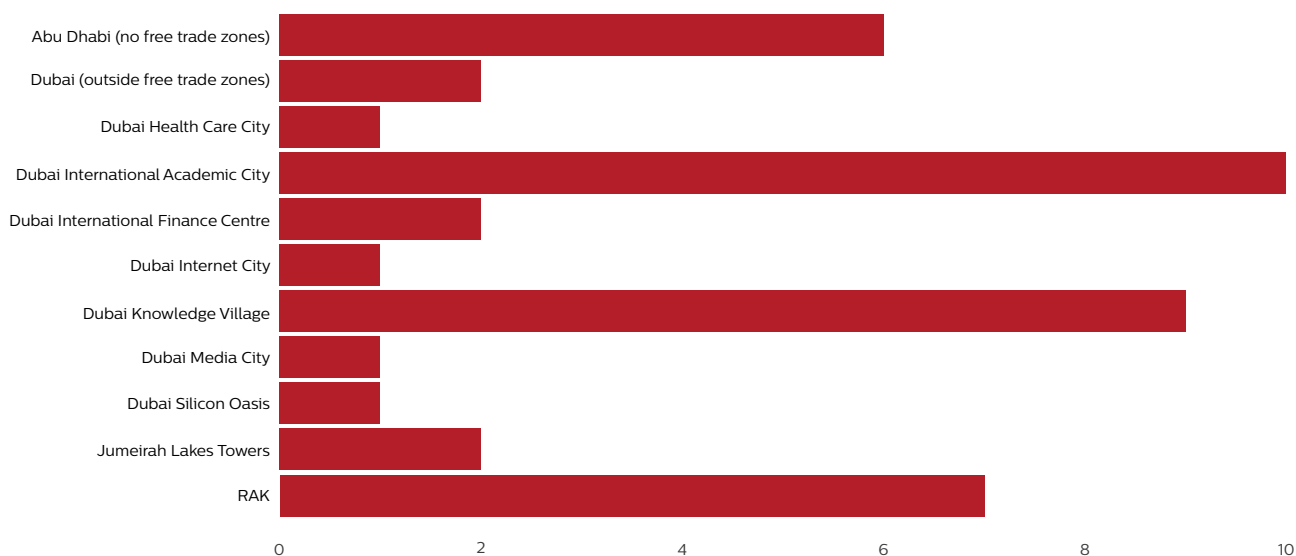
Free zones are typically designed around one business industry category and offer a number of incentives to attract international investment and prompt commercial activity, such as purpose-built facilities, 100% ownership, tax exemption, and no restriction on profit or capital repatriation.[9] Significantly, foreign education providers operating within free zones are exempt from the federal regulations that the UAE government has put in place to regulate and oversee the quality of the fast growing, non-federal higher education sector.

Each emirate is responsible for developing the regulatory environment for its own free zones. Dubai has been the first emirate to develop a local framework to regulate foreign higher education providers operating in its free zones. Ras Al-Khaimah is in the process of developing its own regulatory framework for its academic zone, while Abu Dhabi relies on federal-level oversight. Before looking at the regulatory frameworks at federal and emirate level, the next section will provide an overview of the UK TNE landscape in the UAE.

7   Ras Al-Khaimah Free Trade Zone, available at: http://rakftz.com.

8   Fox, W.H. and Al Shamisi, S. (2014) United Arab Emirates' Education Hub: A Decade of Development. In: Knight, J. (ed.) *International Education Hubs: Student, Talent, Knowledge-Innovation Models.* Dortrecht: Springer, pp. 63-80.

9   UAE Free Zones, available at: www.uaefreezones.com.

The UK transnational education landscape in the United Arab Emirates

According to the latest Aggregate Offshore Record published by the Higher Education Statistics Agency (HESA) for the academic year 2015–16, the number of students studying for a UK award in UAE has reached over 17,000 (see Figure 5). This represents an increase of 10% from the previous year, and of about 58% over the past five years. UK TNE in the UAE is therefore growing steadily and it is expected to continue to grow, with two new UK higher education providers expected to open campuses in Dubai over the next year or so.[10]
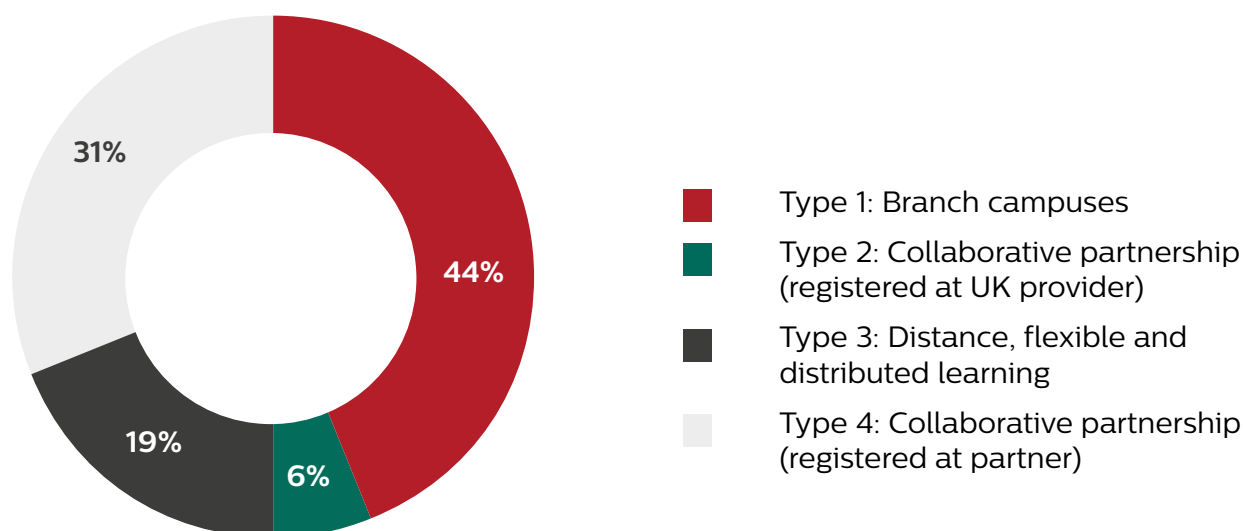
Figure 5: Growth of UK TNE in the UAE
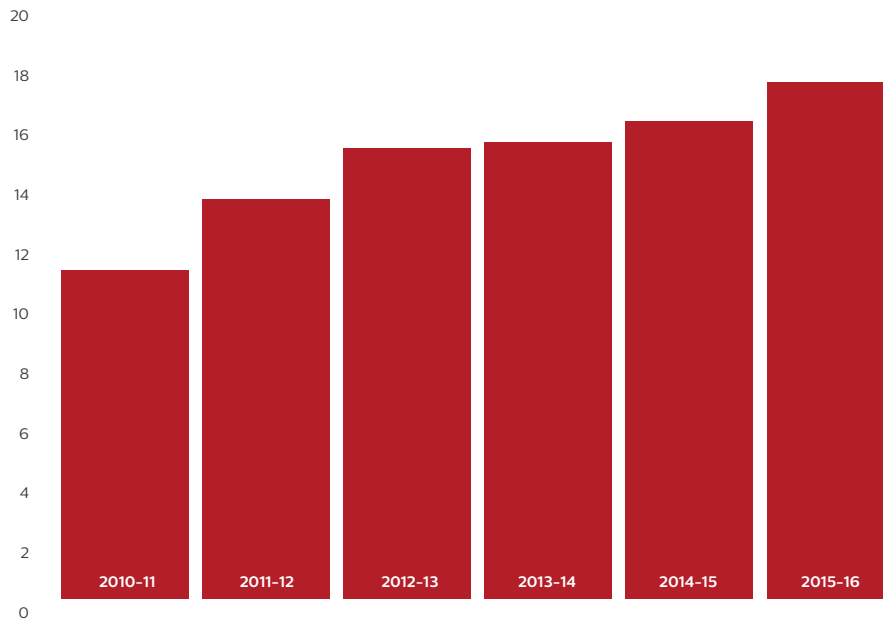
This increase is most noticeable in the number of students in the UAE studying in an overseas branch campus of a UK institution, as defined by the HESA Aggregate Offshore Record. This number has doubled in the past six years. Given that the branch campus model is the predominant model of TNE in the country it is not surprising that the majority of UK TNE provision is delivered through branch campuses. In 2015–16 the proportion of students studying in a branch campus was 44% of all UK TNE delivered in UAE, up from 32% in 2010–11, and 10% from the previous year (see Figure 6).[11] The vast majority (approximately 80%) of all students studying at UK branch campuses are studying at Heriot–Watt University's branch campus in the Dubai International Academic City and Middlesex University's branch campus in Dubai Knowledge Village.

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10   The Knowledge and Human Development Authority of Dubai has confirmed that two new UK higher education providers have been approved to start operation in the free trade zones of Dubai. It is too early yet to share the names of the providers.

11   Note that the vast majority of provision in Type 4 (see classification in Figure 6) is made up of students studying on the top–up BSc in Applied Accountancy delivered by Oxford Brookes University offered to students studying for an Association of Chartered Certified Accountants (ACCA) award, which accounts for the majority of UK TNE worldwide.

Figure 6: Proportion of students by type of TNE (2015–16)

- 44% Type 1: Branch campuses
- 6% Type 2: Collaborative partnership (registered at UK provider)
- 19% Type 3: Distance, flexible and distributed learning
- 31% Type 4: Collaborative partnership (registered at partner)

In addition to the 13 UK providers with a physical presence in the country (see Annex 1), a small number of UK providers have partnership arrangements with private institutions in the UAE for distance and blended-learning delivery of pathway and top-up programmes leading to UK higher education awards.

UK TNE provision in the UAE focuses almost entirely on bachelor's and taught master's degrees, making up 94% of the provision. The growth of UK TNE student numbers in the UAE reflects this reality (see Figure 7). Business programmes continue to be the most popular with students studying for a UK award, reflecting overall trends in the UAE, with approximately 50% of students studying for a UK award taking a business programme.

Figure 7: Growth of UK TNE in the UAE by FHEQ level[12]

Level of provision	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16
Level 8 – doctoral degree	96	119	175	204	222	248
Level 7 – master's degree	4495	5322	5941	5899	6440	6618
Level 6 – bachelor's degree	6018	7580	8467	8655	8700	9668
Level 5 – foundation degree	392	438	540	513	487	831

It is worth noting that the growth of UK TNE in the UAE has been mirrored by a parallel growth of UAE students coming to the UK, in particular to pursue bachelor's studies. This growth might be associated with mobility facilitated by TNE programmes (see Figure 8).

Figure 8: Growth of UAE students coming to the UK by FHEQ level

	First degree	Other undergraduate	Postgraduate (research)	Postgraduate (taught)
2007–08	1,135	170	265	740
2008–09	1,255	220	275	945
2009–10	1,310	300	270	1,115
2010–11	1,405	180	295	1,135
2011–12	1,530	145	310	1,115
2012–13	1,600	145	335	980
2013–14	1,765	130	325	1,065
2014–15	1,965	105	320	1,020
2015–16	2,310	90	310	1,055

12 *The Framework for Higher Education Qualifications in England, Wales and Northern Ireland* (FHEQ), available at: www.qaa.ac.uk/publications/information-and-guidance/publication?PubID=2843.

The United Arab Emirates regulatory landscape

The federal level

In 2000 the federal government established, within the Ministry of Higher Education and Scientific Research (MoHESR), the Commission for Academic Accreditation (CAA) as the federal agency charged with licensing non-federal institutions and accrediting their programmes. All non-federal institutions providing a higher education programme of one academic year or longer leadings to an academic degree, certificate or diploma must be licensed and have its programmes accredited by the CAA in order to be officially recognised by the MoHESR.

Figure 9: Type of higher education institutions in the UAE

- Public
- CAA accredited
- Non-CAA accredited
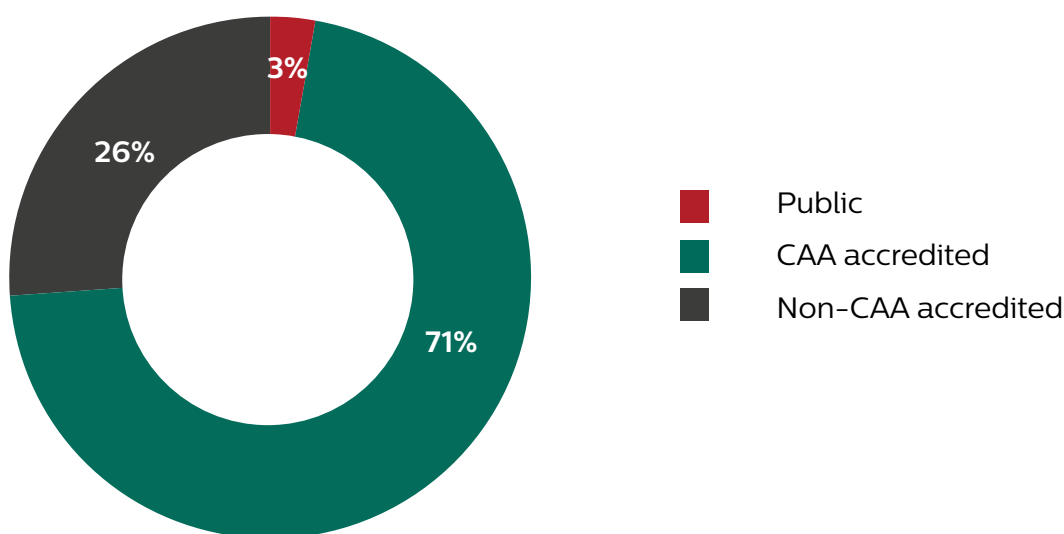
The CAA currently oversees 78 licensed non-federal institutions enrolling over 80,000 students, 55% of these students being non-Emiratis.[13] The three federal institutions (UAEU, Zayed University and the Higher Colleges of Technology) have traditionally been regarded as self-regulating and subject to their own quality assurance mechanisms. However, starting from the 2013–14 academic year, in an attempt to bring consistency across the sector, the MoHESR has mandated that they also be regulated by the CAA.[14] The only providers currently exempt from federal licensure and accreditation requirements are institutions operating exclusively within free zones. These institutions, mostly foreign providers, are subject exclusively to the local emirate authority, although they can voluntarily apply to be reviewed and accredited by CAA as some have chosen to do. Figure 3 provides an overview of the number and types of higher education institutions in the UAE.

The CAA developed its first standards for institutional licensure and programme accreditation in 2001. These have been revised periodically, with the most recent edition published in 2011, and are currently under review. The Standards for Licensure and Accreditation (the Standards)[15] provide the threshold requirements that an institution must meet for institutional licensure, the renewal of licensure, and for programme accreditation and the renewal of accreditation.

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13   Source: CAA, available at: www.caa.ae/caa/DesktopModules/InstEnrollment.aspx.

14   The National (2013) Federal universities in UAE to get same regulator as private universities, available at: www.thenational.ae/news/uae-news/federal-universities-in-UAR-to-get-same-regulator-as-private-universities.

15   The Standards for Licensure and Accreditation, available at: www.caa.ae/caa/images/Standards2011.pdf (PDF, 1.7MB).

Licensure applies to the entire institution and all its activities. In order to be licensed, the institution must meet the Standards, demonstrating how it complies with each of the associated criteria. There are 11 Standards and numerous associated criteria covering a broad range of areas, including:

- mission and governance
- quality assurance and enhancement
- curricula and approach to teaching and learning
- faculty and other professional personnel
- student services and support
- learning resources
- physical environment
- financial resources
- research
- community engagement.

The first Standard, pertaining to the mission, organisation and governance of a provider, has criteria specific to branch campuses of foreign institutions. These include the requirements to:

- comply with applicable rules and regulations of the UAE
- comply with the requirements for institutional licensure and programme accreditation of the CAA
- provide an educational experience that ensures the achievement of the same learning outcomes as at the parent institution
- establish a local advisory board to include representatives of the UAE community, which will advise the chief administrators of the branch campus and the senior administrators of the parent institution
- demonstrate that the governing body of the parent institution has approved the establishment of the branch campus
- have local administrators, who are accountable directly to the central administration of the parent institution and, ultimately, the governing body of the parent institution
- operate under the same name as the parent institution, with additional identification of the local branch
- publish student, faculty and staff handbooks, and other policies and procedures appropriate for the branch campus and its location
- provide the CAA with a financial guarantee for the operation of the institution, including a plan for and support of a teach-out arrangement should the branch campus be forced to close or a programme be discontinued
- provide the CAA access to the accreditation (institutional and programmatic) and financial documents of the parent institution, as applicable
- work with the CAA as necessary in developing joint visits and partnerships with the accrediting bodies of the parent institution.

The Procedural Guidelines for Initial Licensure[16] outline in detail the documentation required to apply for initial institutional licensure and the application and assessment process, which will include an on-site inspection of the physical premises and resources. Initial licensure is

16 Procedural Guidelines for Initial Licensure, available at: www.caa.ae/caa/images/Guide-IL.pdf (PDF, 896KB).

granted for up to five years. A licensed institution is required to identify its status as licensed by CAA in all documents and advertising, and to comply with the CAA's requirement for reporting data annually. Renewal of licensure is required every five years after licensure is granted. The Procedural Guidelines for Renewal of Licensure[17] outline the documentation required and the process for renewing institutional licensure. This is expected to be only a desk-based review exercise undertaken by the CAA, although on-site visits might take place, and external consultants might be involved.

Institutions can apply for initial accreditation of an academic programme only after being granted initial licensure. Initial accreditation must be obtained before institutions start advertising an academic programme and enrolling students. The Procedural Guidelines for Initial Accreditation[18] outline the required documentation and the accreditation process in details. The core of the process is the submission of a programme proposal that shows how the Standards and the associated criteria set for academic programmes are met. This provides the basis for initial review by CAA and a team of international experts, which will be followed by a campus visit.

Initial accreditation remains in effect for up to two years after the first cohort of students graduates from the programme, provided students are enrolled within one year of accreditation. If no students are enrolled after the first year of accreditation a new initial accreditation application must be submitted. After the prescribed initial period, a programme's accreditation must be renewed every five years. Accredited programmes may receive unscheduled visits from the CAA to ensure that they continue to meet the requirements of the Standards. Renewal of accreditation requires a critical self-study and a further assessment by a review team to ensure that the programme's anticipated outcomes are being achieved, including on-campus visits. Details can be found in the Procedural Guidelines for Renewal of Accreditation.[19]

CAA has also published separate sets of Standards for Licensure and Accreditation of Technical and Vocational Education and Training[20] and e-Learning Standards for Licensure and Accreditation.[21]

A list of all licensed institutions and accredited programmes is accessible on the CAA website. Institutions and programmes that have been denied licensure or accreditation, or have been put in probation for a specific period of time, are also listed.[22] CAA accreditation is required for higher education qualifications to be officially recognised at federal level. This means that qualifications obtained by studying on non-CAA accredited TNE programmes in free trade zones are not automatically recognised at federal level.

Foreign distance-learning qualifications are not automatically recognised in the UAE. In 2014 the MoHESR released guidelines for the recognition of foreign qualifications obtained through distance learning. These include the requirement that the foreign institution is recognised by the local authorities in which it is based, that the programme is accredited by the home country's authorities, that its length of study is no less than the minimum duration of study for a comparable programme taught by traditional means, and that it offers interactive e-learning. A list of 105 foreign online universities, recommended for UAE students whose qualifications will be recognised in the country was released by the MoHESR in 2014.[23]

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17   Procedural Guidelines for Renewal of Licensure, available at: www.caa.ae/caa/images/Guide-RL.pdf (PDF, 888KB).

18   Procedural Guidelines for Initial Accreditation, available at: www.caa.ae/caa/images/Guide-IA.pdf (PDF, 979KB).

19   Procedural Guidelines for Renewal of Accreditation, available at: www.caa.ae/caa/images/Guide-RA.pdf (PDF, 994KB).

20   Standards for Licensure and Accreditation of Technical and Vocational Education and Training, available at: www.caa.ae/caa/images/standards2009.pdf (PDF, 539KB).

21   e-Learning Standards for Licensure and Accreditation, available at: www.caa.ae/caa/images/elearningStandards.pdf (PDF, 5.46MB).

22   CAA website, available at: www.caa.ae.

23   The National (2014) UAE releases list of accredited foreign online universities, available at: www.thenational.ae/uae/education/uae-releases-list-of-accredited-foreign-online-universities.
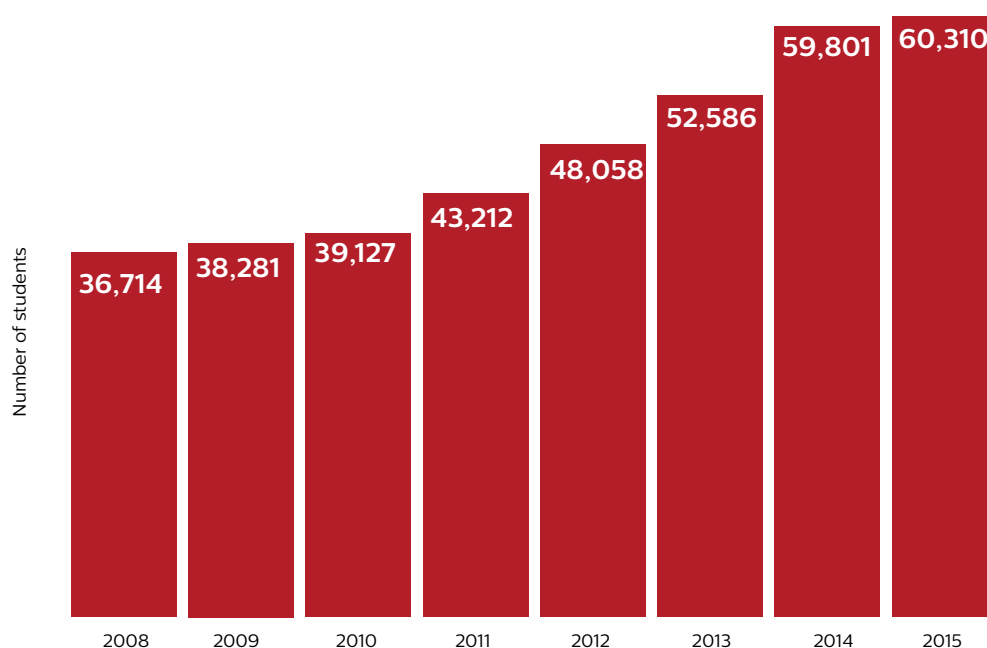
Dubai

The emirate of Dubai has been successful in attracting foreign higher education providers within a relatively short period of time. Key to Dubai's strategy has been the development of purpose-built free trade zones, dedicated to specific business industry categories, and offering a number of incentives to attract international investment and facilitate business opportunities.[24] The higher education landscape in Dubai counts 56 higher education institutions, with an estimated total of about 60,000 students. Free zones now host the majority of higher education providers and students in the emirate, a total of 36 institutions collectively enrolling about 29,000 students. The great majority of providers within the free zones are international (27), also constituting 60% of all foreign providers operating in the UAE. Outside the free zone there are 23 institutions (two of which are international) enrolling 20,000 students. In addition, the three federal institutions enrol just over 10,000 students. Figure 13 lists the foreign education providers operating in the emirate of Dubai.

> Dubai Knowledge Village (DKV) was opened in 2003, as the first purpose-built zone to house education institutions, attracting eight higher education institutions in its first year of operation, some of which were operating outside the free zone prior to its establishment. Its popularity encouraged the local government to establish more, including Dubai International Financial Centre (DIFC) in 2004, and Dubai International Academic City (DIAC) in 2005, dedicated exclusively to higher education institutions. Since the establishment of the DKV in 2003, there has been an exponential growth of international institutions setting up in free trade zones compared with the growth of the number of institutions outside the free zones.

Student numbers in Dubai have grown by over 65% over the past ten years. The marginal growth of the last recorded year (Figure 10), mirroring the marginal growth in number of institutions (Figure 11), might hint at a period of saturation in the market. Equally, the slowdown in growth might be a reflection of macro-economic factors, notably the strength of the dollar and the low oil price, which have impacted on Dubai's ability to attract students from the region and Africa. Nonetheless, there are still favourable conditions in Dubai to support further growth in the number of students and institutions in the future, taking into account in particular that the emirate will host the Expo 2020; has established itself as the leading destination for logistics, aviation, health and finance for the region; and has a supportive regulatory environment, especially for transnational providers, underpinned by a well-regarded international quality assurance system.

Figure 10: Higher education students in Dubai

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24 These include purpose-built facilities; 100% ownership; tax exemption; and no restriction on profit or capital repatriation.

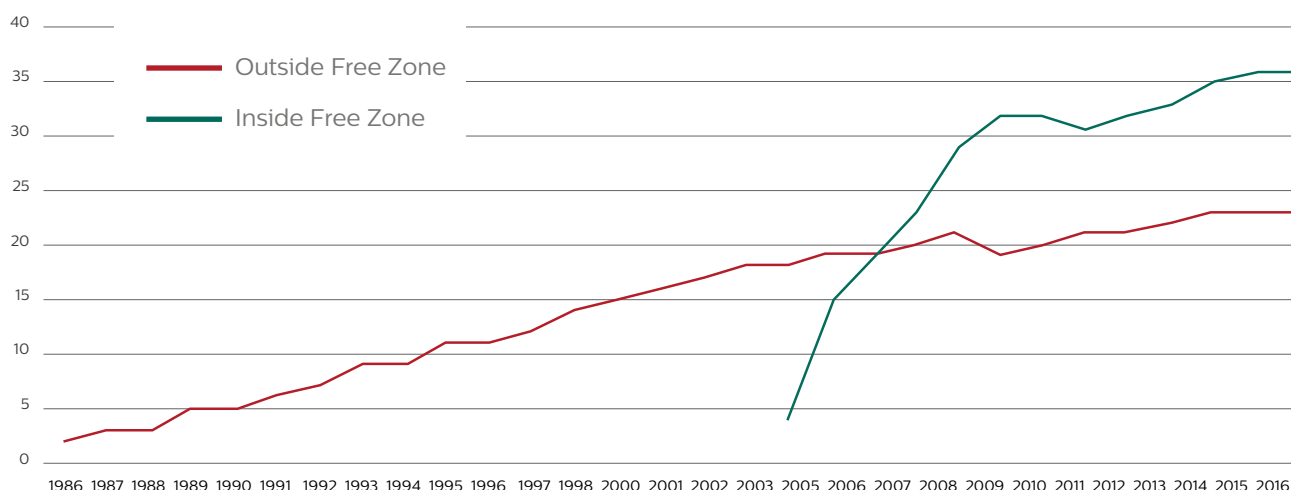**Figure 11: Number of higher education providers in Dubai**

Figure 12: TNE subject and levels of study in Dubai's free zones

	Undergraduate	Postgraduate
Business	7714	6932
Engineering	3749	574
Media and Design	1930	118
Information Technology	1624	394
Architecture and Construction	799	865
Humanities	504	185
Tourism and Hospitality	448	25
Education	34	429
Foundation	271	108
Law	218	120
Natural and Physical Sciences	251	21
Health and Medicine	0	12

The student body in Dubai is highly internationalised, with Emirati students representing only 43% of the total student population. Most national students study at federal and local institutions outside the free trade zone. Students studying foreign higher education in the free zones are primarily expats and international students, coming mainly from Asia, other Arab countries, and Africa. The majority of all students (65%) are enrolled in bachelor's programmes (accounting for 52% of all programmes). 19% of students are enrolled in master's degrees (33% of all programmes). This differs within the free trade zone, where over 40% of the programmes offered by foreign providers (over 300 programmes) are at the master's degree level.

The most popular subject of study is business. Indeed, with more than 120 business programmes on offer, Dubai has become a niche destination for international business students. However, in recent years the emirate has been able to diversify the range of programmes available, extending to areas such as media, humanities, law, and natural and physical sciences, in addition to engineering, IT, and tourism and hospitality. This is due in particular to foreign providers offering a wider range of programmes than local non–federal institutions, as well as the emirate's effort to better align higher education provision to its economic and social needs. A key role in this regard has been played by the Knowledge and

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Human Development Authority (KHDA), the Dubai government authority established in 2007 to oversee the development of quality private education to meet the emirate's aspirations for growth, innovation and a diversified economy.

Figure 13: Foreign higher education providers with a physical presence in Dubai (KHDA)

Provider	Location	Home country
Murdoch University	DIAC	Australia
S P Jain School of Global Management	DIAC	Australia
SAE Institute	DKP	Australia
University of Wollongong in Dubai	DKP	Australia
MODUL University	JLT	Austria
ESMOD French Fashion Institute	DIAC	France
Amity University	DIAC	India
Birla Institute of Technology and Science Pilani	DIAC	India
Institute of Management Technology	DIAC	India
Manipal University	DIAC	India
Islamic Azad University	DKV	Iran
Royal College of Surgeons	DHCC	Ireland
University of St. Joseph	DIAC	Lebanon
Shaheed Zulfikar Ali Bhutto Institute of Science and Technology	DIAC	Pakistan
Saint-Petersburg State Economic University	DKV	Russia
Moscow University for Industry and Finance (Synergy)	JLT	Russia
Heriot-Watt University	DIAC	UK
Cass Business School – City University London	DIFC	UK
London Business School	DIFC	UK
Manchester Business School	DKP	UK
Middlesex University Dubai	DKP	UK
University of Exeter	DKP	UK
University of Bradford	DKP	UK
University of Strathclyde Business School	Outside FTZs	UK
Emirates Aviation University	Outside FTZs	UK
Hult International Business School	DIC	US
Michigan State University in Dubai	DKP	US
American University in Dubai	DMC	US
Rochester Institute of Technology	DSO	US

KHDA is responsible for the regulation and quality assurance of all higher education institutions located in Dubai's free zones, as per Dubai Executive Council Resolution 21 (2011). All higher education providers wishing to operate in the free zones must obtain academic authorisation to operate and have their education programmes registered with the KHDA. The KHDA grants and annually renews institutional permits and academic programme registration either on approval by its internal quality assurance body, the University and Quality Assurance International Board (UQAIB), or on institutional licensure and programme accreditation by the CAA.[25]

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25 Quality Assurance in The Free Trade Zones of Dubai, available at: www.khda.gov.ae/en/FZQA?i=4.

The UQAIB is an independent advisory board composed of international experts. It was established in 2008 to assist the KHDA in ensuring that the quality of higher education offered by foreign providers operating in the Dubai free zones is in line with international and emirate standards. The UQAIB makes recommendations about issuing academic authorisation to new institutions, as well as renewing the academic authorisation of existing universities and colleges. It also approves all new programmes offered by higher education providers.

To assure the quality of foreign higher education offered in Dubai, the UQAIB has developed the Equivalency Validation Model aimed at assessing the demonstrated quality equivalence of provision in Dubai in relation to the home higher education provider. This model places particular reliance on quality assurance and accreditation from the home country, with the UQAIB taking account of existing reports on the quality of provision of foreign providers produced by their home country's quality assurance or accreditation bodies. The UQAIB Quality Assurance Manual[26] explains in detail the quality assurance system for foreign providers wishing to operate in Dubai's free trade zones.

All applications for Academic Authorisation and Programme Registration are preliminarily screened by the KHDA Higher Education Department before being passed to the UQAIB. This is to ensure that the application is consistent with the strategic needs of Dubai, having regard to the Dubai Strategic Plan, the extant provision of higher education, and new demographic and economic trends. The KHDA has the right to reject an application that fails to satisfy these criteria.

Academic Authorisations are issued by the Regulation and Permits Commission of the KHDA and are based upon UQAIB Branch Approval. This is based on the assessment on whether the higher education provider applying for authorisation is a bona fide higher education provider in good standing with a reputable quality assurance agency, preferably from the provider's own country; and whether the proposed branch operation has institutional policies, practices and resources in place to ensure learning conditions for students that are similarly conducive to student success as the learning conditions at the home campus.

Programme Registration with the KHDA is based on UQAIB Validation, a process of external quality assurance aimed at ensuring that the learning outcomes and quality of an academic programme offered in a free zone are substantially equivalent to the learning outcomes and quality of academic programmes offered at the home campus of the foreign provider. Validation normally requires that the academic programme has been run at the home campus for a sufficient period of time to prove its quality. Under exceptional circumstances the UQAIB may consider a proposal to register an academic programme that will commence at the branch and home campus at the same time. A programme that has been validated may seek some adaptations to better suit the Dubai context.

Following a recent review of the programme registration processes, providers that have established a strong record of performance in the free zones may now be eligible to offer academic programmes at the branch that are not offered at the home campus. The purpose of this process, called Programme Endorsement, is to enable well-established international institutions to provide degree programmes specifically designed to address educational needs in Dubai, without being constrained by the need to have equivalent programmes at the home where there may not be an equivalent demand.

The Branch Approval and Programme Validation processes are designed as primarily desk-based exercises. However, in cases where the UQAIB finds that there is insufficient information to determine that adequate quality assurance processes exist, it may ask for an institutional visit to take place. For all initial successful applications, Branch Approval and Programme Validation/Endorsement will be granted for a period not exceeding one year. In the case of renewal applications, Branch Approval can be issued for a period between one and five years, and Programme Validation/Endorsement for a period between three and five

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26 The UQAIB Quality Manual, available at: www.khda.gov.ae/CMS/WebParts/TextEditor/Documents/UQAIB_EN.pdf (PDF, 3.1MB).

years. Both providers and academic programmes can be given a probation period during which they have to meet conditions posed by the KHDA.

If initial application or renewal is unsuccessful a provider must cease all higher education activity (for Academic Authorisation) or rejected programmes (for Programme Registration).

The KHDA will normally provide a time frame within which activities must cease or programmes be closed down. It is a condition of Academic Authorisation that higher education providers accept the full responsibility for ensuring that students are not disadvantaged in the event of the provider's branch losing Academic Authorisation or Programme Registration. Providers are therefore expected to provide appropriate opportunities for all their students to enable them to complete their programme/s of study. Any teach-out arrangement must be approved by the KHDA.

Higher education providers in the free zones that have been issued Institutional Licensure by the CAA will still need to obtain Academic Authorisation from the KHDA, but the process will be less involved as the KHDA will rely on the quality assurance processes of the CAA. Similarly, programmes that are accredited by the CAA are exempt from the UQAIB Programme Validation and Endorsement process, but must still be registered with the KHDA before they are offered in the free zones.

Obtaining CAA Licensure and Accreditation is voluntary for providers in the free zone. This means that qualifications obtained from non-CAA licensed free zone universities won't be automatically recognised at federal level. In Dubai, the 2011 Dubai Council Resolution establishes that qualifications granted by KHDA-approved institutions and certified by the KHDA will be recognised by the public and private sector in Dubai for all purposes, such as employment and further study. However, the lack of federal recognition has implications for graduates seeking to work in federal public organisations in the rest of the UAE or to enrol into CAA-licensed institutions for further study, or at times even seeking to have their qualifications recognised overseas. This has motivated a number of foreign institutions operating in Dubai's free zones to voluntarily seek CAA licensure and accreditation. However, for institutions catering primarily to expatriate or international students, this lack of federal recognition does seem to represent a pressing concern, as students want a credential that is recognised internationally (and by the Dubai government), rather than a credential recognised in the other six emirates.

Given the strategic importance of foreign higher education to Dubai, and the UQAIB's quality assurance model for TNE, which places great reliance on providers' home country quality assurance, international cooperation with other quality assurance agencies is a high priority for the KHDA.

In 2014, with support from QAA, KHDA led the establishment of the Quality Beyond Boundaries Group (QBBG), an informal network of international quality assurance agencies from major sending and receiving countries of cross-border education intended as a platform for information sharing and facilitating collaboration in the quality assurance of TNE. The QBBG currently involves, in addition to the KHDA and QAA: the Tertiary Education Quality and Standards Agency (Australia); the Hong Kong Council for Accreditation of Academic and Vocational Qualifications; the Malaysian Qualifications Agency; the Committee for Private Education (Singapore); and the New England Association of Schools and Colleges, and WASC Senior College and University Commission in the United States.

The establishment of the QBBG followed the successful cooperation between the KHDA and QAA as part QAA's review of UK TNE in the UAE in 2013,[27] especially around the sharing of information, data, and intelligence. The KHDA briefed the QAA review team about the local operating environment in Dubai and the UAE; shared its annual census of TNE providers with QAA; and engaged with QAA's review visit as observers, helping the review team to gain an understanding of issues pertaining to the local context. In addition to facilitating QAA's review of UK TNE in the free trade zones of Dubai, by engaging closely with the review process the KHDA was able to appreciate the robustness of UK providers' processes for

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27 *Review of UK Transnational Education in United Arab Emirates: Overview*, available at:
www.qaa.ac.uk/en/ReviewsAndReports/Pages/TNE-Review-UAE-2014.aspx.

programme development, monitoring and review. This has contributed to the development of KHDA's Programme Endorsement route to programme registration to allow providers with a robust track record to deliver programmes more suited to the local skills and economic needs of the emirate and the UAE more generally.

Ras Al-Khaimah

The majority of higher education students (70%) in the emirate of Ras Al-Khaimah study in the three publicly funded universities of the emirate. These include the Higher Colleges of Technology, the American University of Ras Al-Khaimah, and Ras Al-Khaimah Medical and Health Sciences University.

The emirate has also established a free trade zone to provide education and attract foreign higher education, offering lower business and living costs than the free zones of Dubai. The Ras Al-Khaimah Economic Zone (RAKEZ) Academic Zone currently hosts seven foreign providers (see Figure 14), enrolling just over 1,500 students; these are mostly from South Asia, in particular Pakistan, India and Bangladesh. A RAKEZ authority has been established to oversee, regulate and consolidate the services of the two leading free zones in the emirate: Ras Al-Khaimah Free Trade Zone and the Ras Al-Khaimah Investment Authority. The RAKEZ Academic Zone is intended to drive Ras Al-Khaimah's educational growth by attracting qualified educational institutions and service providers that are committed to delivering market-driven educational training and professional development services; and supporting the emirate and the UAE in meeting the economic and social needs in the context of Vision 2021.

Figure 14: Foreign higher education providers with a physical presence in RAKEZ Academic Zone[28]

Provider	Home country
Birla Institute of Technology	India
Abasyn University	Pakistan
École Polytechnique Fédérale de Lausanne	Switzerland
Swiss Business School	Switzerland
Bath Spa University	United Kingdom
University of Bolton	United Kingdom
University of West London	United Kingdom

The process to set up TNE provision in Ras Al-Khaimah is still in a state of transformation. Over the years the franchise model has been the predominant accepted model by the free zone authority. Starting in 2016, RAKEZ Academic Zone has initiated the 'branch licencing' model requiring all TNE providers to apply for a Branch or Centre Licence, and to partner with a non-academic infrastructure provider (NAIP). The NAIP is a commercial company that is responsible for the non-academic affairs of the TNE operation, such as infrastructure, visas, marketing, admissions, and all commercial contracts and approvals with local authorities.

In order to apply for a Branch or Centre Licence foreign providers must be recognised as bona fide higher education institutions in their home country. The Branch university will be solely responsible for managing the educational programmes offered. Indeed, the intention of the new Branch Licence system is to ensure that the foreign awarding body is significantly involved in the day-to-day operation of the academic programmes delivered in the RAKEZ Academic Zone. A detailed academic plan, explaining all the areas that will be covered by the degree-awarding body, is now a mandatory requirement to obtain the Branch Licence. All promotion of academic programmes must also be done under the name of the foreign higher education provider, not the NAIP. The RAKEZ Academic Zone's rules

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28 In addition to the three UK universities that have established a physical presence in RAKEZ Academic Zone, there is a small number of other UK degree-awarding bodies offering online programmes in partnership with local private institutions.

and regulations for obtaining and maintaining Branch Licence will soon be published. These are expected to cover six main areas: Companies Regulation, Employment Regulations, Licensing Regulations, Academic Delivery/Quality Regulations, Operational Regulations, and Advertising/Brand Management, taking into consideration regional and international practice in the regulation and quality assurance of TNE.

In 2016 QAA and the new RAKEZ Academic Zone signed a Letter of Intent to cooperate in supporting the development and the quality assurance of UK TNE in the Academic Zone, as Ras Al-Khaimah develops its regulatory framework and looks to position itself as a destination for education in the UAE and the broader region. With a growing population, low business and living costs (even 50% lower than Dubai), and an increasing demand for education in a wide range of professional areas, Ras Al-Khaimah can become an alternative destination for UK higher education providers seeking to operate in the UAE and the Gulf Cooperation Council region.

Abu Dhabi

The emirate of Abu Dhabi is the largest emirate by landmass (87% of the UAE), with a population approximately the size of the smaller emirate of Dubai. Importantly, it has the largest share of oil production and reserves in the UAE (over 90%).[29] Abu Dhabi has two main urban areas: the federal capital city of Abu Dhabi, and the city of Al Ain, which borders Oman. Both cities contain a number of higher education providers.

In 2015-16 there were 52,000 students enrolled in 29 higher education providers in Abu Dhabi. Student enrolment has grown steadily over the past five years, similarly to Dubai, but the increase has been mainly met by the public sector (Figure 15) and by UAE nationals (Figure 16).

Figure 15: Growth of higher education enrolments in Abu Dhabi

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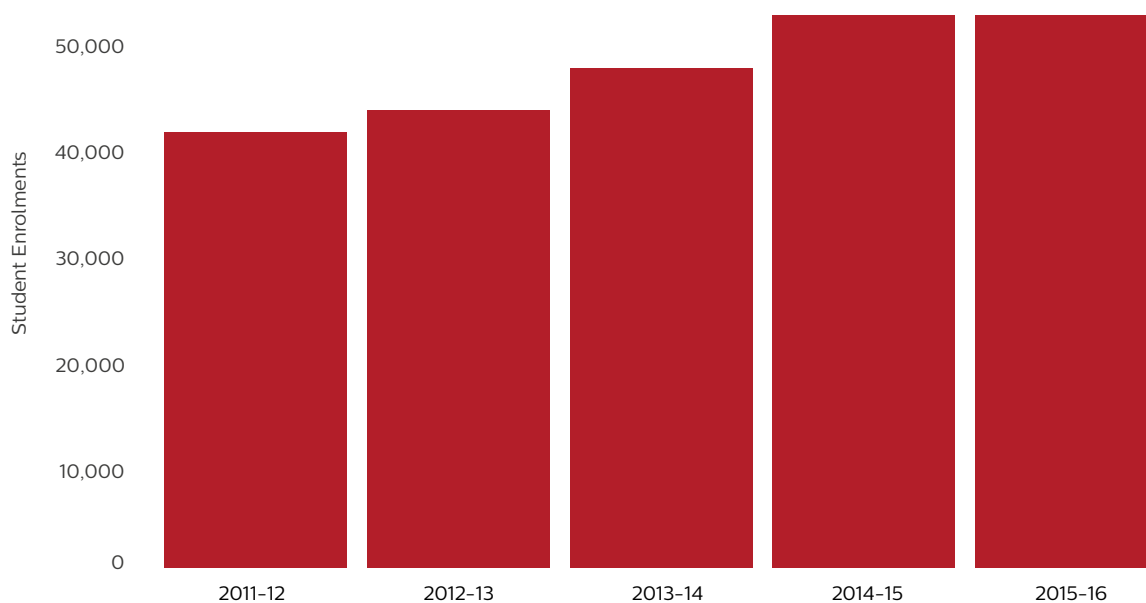
29 Source: Organisation of the Petroleum Exporting Countries, available at: www.opec.org/opec_web/en/17.htm.

Figure 16: Student enrolment by type of provider
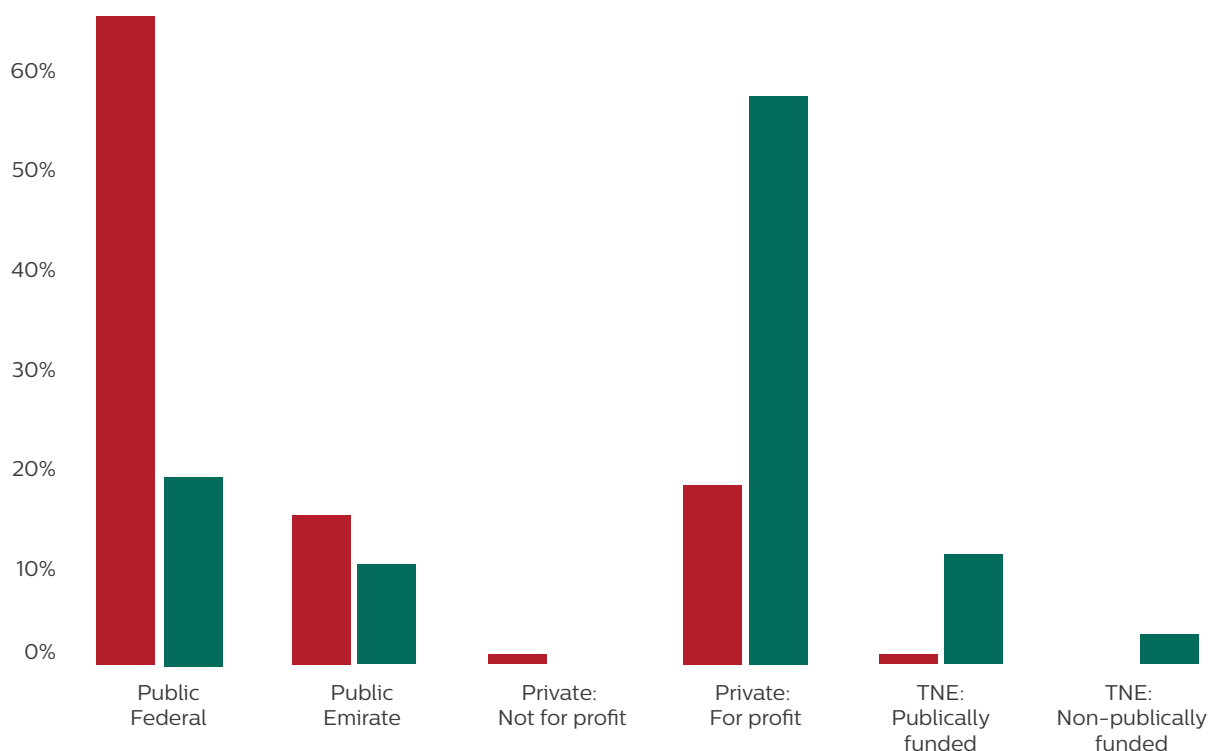
Most higher education enrolment in Abu Dhabi is within the public sector, which includes the three federal universities (United Arab Emirates University, the Higher Colleges of Technology, and Zayed University), with the largest enrolment in the emirate and 15 publicly funded non-federal higher education institutions, including four foreign providers (see Figure 18). There are two major private for-profit providers: Abu Dhabi University and Al Ain University of Science and Technology. Foreign providers service only 5% of the enrolled students in the emirate.

Most higher education provision (89%) is at undergraduate level, with engineering, business and management representing the dominant subject areas.

Figure 17: Classification of higher education providers in Abu Dhabi

Type of provider	Quantity	Students enrolled
Public: Federal	6 [30]	27,291
Public: Emirate	8	7,191
Private: Not for profit	2	334
Private: For profit	7	14,608
TNE: Publically funded	4	2,073
TNE: Non-publically funded	2	538
Totals	29	52,035

Abu Dhabi has adopted a less market-driven and a more interventionist approach to the development of its higher education sector than the emirates of Dubai and Ras Al-Khaimah. In particular, as well as direct funding for public institutions, the government of Abu Dhabi has invited some high profile foreign providers to establish in the emirate, funding and supporting them in terms of set-up and operations. These include New York University, Paris Sorbonne University.

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30 There are three federal institutions: United Arab Emirates University, Zayed University, and the Higher Colleges of Technology. There are three other institutions delivering programmes in Abu Dhabi that could be considered as federal entities: the National Defence College, the Emirates Institute for Citizenship and Residence, and the Emirates Diplomatic Academy. These three institutions provide specialist programmes for the federal and emirate governments.

University, Mohamed V University and INSEAD. Two other foreign providers, New York Institute of Technology and the University of Strathclyde, are self-supporting (see Figure 18).

Foreign providers offer a higher proportion of master's level provision (28%) than other higher education providers in the emirate (less than 10%). Business and management is again the dominant subject of study for students enrolled with foreign providers, although there is a high number of students enrolled onto undergraduate humanities programmes due to the disciplinary strengths of both New York University and Paris Sorbonne University.

Figure 18: Foreign higher education providers with a physical presence in Abu Dhabi (Abu Dhabi Education Council)

Provider	Status	Home country
Paris Sorbonne University	Public non-federal	France
INSEAD	Public non federal	France
Mohammed V University – Agdal	Public non-federal	Morocco
University of Strathclyde Business School	Private	United Kingdom
New York Institute of Technology	Private	United States
New York University	Public non federal	United States

The higher education sector in Abu Dhabi is regulated, in addition to the MoHESR and CAA, which operate at federal level, by the Abu Dhabi Education Council (ADEC), formed in 2005. The ADEC has the authority to establish academic institutions and educational bodies in Abu Dhabi, in coordination with MoHESR and with approval from the Abu Dhabi Executive Council. The ADEC's work focuses on:

- elevating the quality of higher education, ensuring high licensing standards and incentives for continuous improvement

- promoting and incentivising research, innovation, scholarship and discovery as key drivers for developing a highly skilled, highly productive and competitive national workforce

- aligning higher education with labour market and socio-economic needs, guided by the Abu Dhabi Economic Vision 2030 and Abu Dhabi's policy agenda.

The Abu Dhabi Economic Vision 2030 is a comprehensive plan from the government of Abu Dhabi for the long-term transformation and diversification of the emirate's economy. It is a blueprint for creating a reduced reliance on the oil sector as a source of economic activity, and greater focus on knowledge-based industries by 2030. Among its immediate economic priorities is that of developing a highly skilled and highly productive workforce, to create opportunities for the local and international private sector in the emirate, and new employment opportunities for UAE nationals in the future, particularly in highly skilled, knowledge-based and export-oriented sectors.

The ADEC has a memorandum of understanding with the MoHESR that ensures that all institutions seeking licensure or renewal of licensure, or new programme accreditation, first require 'authorisation' from the ADEC, via the ADEC's higher education sector Quality Improvement Division. Once authorisation is given by the ADEC, based on an assessment of the fitness of purpose of the institution or programme for the needs of Abu Dhabi, an institution can then seek institutional licensure or programme accreditation from the CAA.

The ADEC is akin to Dubai's KHDA, but unlike the KHDA it oversees all higher education providers in the emirate, not only those located in Abu Dhabi's free zones (most notably, Masdar City, the New York University campus and Al Maryah Island), and its processes and standards are more closely aligned with those of the CAA. This is therefore a different model from the emirate of Dubai, where the KHDA regulates the free zones and the MoHESR/CAA has oversight of institutions outside of the free zones and limited interaction with institutions within the free zones.

This different model is consistent with Abu Dhabi's different approach to foreign provision, which has traditionally been more selective and interventionist than those of Dubai or Ras Al-Khaimah. In the future, it is unclear whether Abu Dhabi's government will invest at the same level to attract foreign providers to establish TNE operations in the emirate. It is, however, clear that Abu Dhabi still welcomes well-known and high quality foreign providers, which can show clear value-adding activity that directly impacts the economy of the emirate, and can contribute to the key priorities set out in the Economic Vision 2030, such as increasing the national workforce participation and employability, in particular in strategic sectors such as engineering, aerospace, IT, medicine, applied sciences, tourism and business.

Building a stronger higher education sector through world-class universities, as well as developing the emirate's vocational and technical base, is seen as key to achieving this. There might, therefore, be future opportunities for UK higher education providers to establish a presence in Abu Dhabi.

Annex: Foreign higher education providers with a physical presence in the United Arab Emirates

Higher education provider	Location	Country
Paris Sorbonne University	Abu Dhabi	France
INSEAD	Abu Dhabi	France
Mohammed V University – Agdal	Abu Dhabi	Morocco
New York Institute of Technology	Abu Dhabi	US
New York University	Abu Dhabi	US
University of Strathclyde Business School	Abu Dhabi	UK
Royal College of Surgeons	DHCC, Dubai	Ireland
Murdoch University	DIAC, Dubai	Australia
S P Jain School of Global Management	DIAC, Dubai	Australia
ESMOD French Fashion Institute	DIAC, Dubai	France
Amity University	DIAC, Dubai	India
Birla Institute of Technology and Science Pilani (Bits Pilani)	DIAC, Dubai	India
Institute of Management Technology	DIAC, Dubai	India
Manipal University	DIAC, Dubai	India
University of St. Joseph	DIAC, Dubai	Lebanon
Shaheed Zulfikar Ali Bhutto Institute of Science and Technology	DIAC, Dubai	Pakistan
Heriot–Watt University	DIAC, Dubai	UK
Hult International Business School	DIC, Dubai	US
Cass Business School – City University London	DIFC, Dubai	UK
London Business School	DIFC, Dubai	UK
SAE Institute	DKP, Dubai	Australia
University of Wollongong	DKP, Dubai	Australia
Islamic Azad University	DKP, Dubai	Iran
Saint–Petersburg State Economic University	DKP, Dubai	Russia
Manchester Business School	DKP, Dubai	UK
Middlesex University	DKP, Dubai	UK
University of Exeter	DKP, Dubai	UK
University of Bradford	DKP, Dubai	UK
Michigan State University	DKP, Dubai	US
American University in Dubai	DMC, Dubai	US
Rochester Institute of Technology	DSO, Dubai	US
Coventry University	Dubai	UK
University of Strathclyde Business School	Dubai	UK
MODUL University Dubai	JLT, Dubai	Austria
Moscow University for Industry and Finance (Synergy)	JLT, Dubai	Russia
Abasyn University	Ras Al–Khaimah	Pakistan
EPFL	Ras Al–Khaimah	Switzerland

Swiss Business School	Ras Al-Khaimah	Switzerland
University of Bolton	Ras Al-Khaimah	UK
Bath Spa University	Ras Al-Khaimah	UK
University of West London	Ras Al-Khaimah	UK
Birla Institute of Technology	Ras Al-Khaimah	India