

Environment for Transnational Higher Education
Partnerships and UK Qualifications:
Challenges and Opportunities

Saudi Arabia and UK

Findings and recommendations
from primary research

Part of Going Global Partnerships



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1. Introduction

This report considers the opportunities for higher education and technical training collaboration between institutions in Saudi Arabia and the UK to develop and extend joint international partnerships in education. These include the provision of programmes from undergraduate to doctoral level. There is a mutual interest in collaboration between Saudi Arabia and the UK, particularly where this will strengthen the countries' respective higher education agendas.

The report aims to provide a better understanding of the environment for such partnerships. In order to do this, a review of the legislative, regulatory and policy frameworks for international higher education was undertaken. Interviews were then conducted with higher education stakeholders in both countries. These included government representatives, sector agencies, higher education leaders, partnership managers and academic course leads. The report contains their views relating to the opportunities and the main challenges, together with how these might be addressed. Their contributions in the interview discussions inform the recommendations.

Data in this report is drawn from three sources:

- Desk research of the regulatory and policy context of higher education in Saudi Arabia.
- Semi-structured interviews conducted in March and April 2022 with nine stakeholders from the UK and Saudi institutions.
- Analysis of the UK Higher Education Statistics Agency Aggregate Offshore Record (2022) to provide a background on the current position on transnational education provision for the academic year 2020-21.

2. The current position

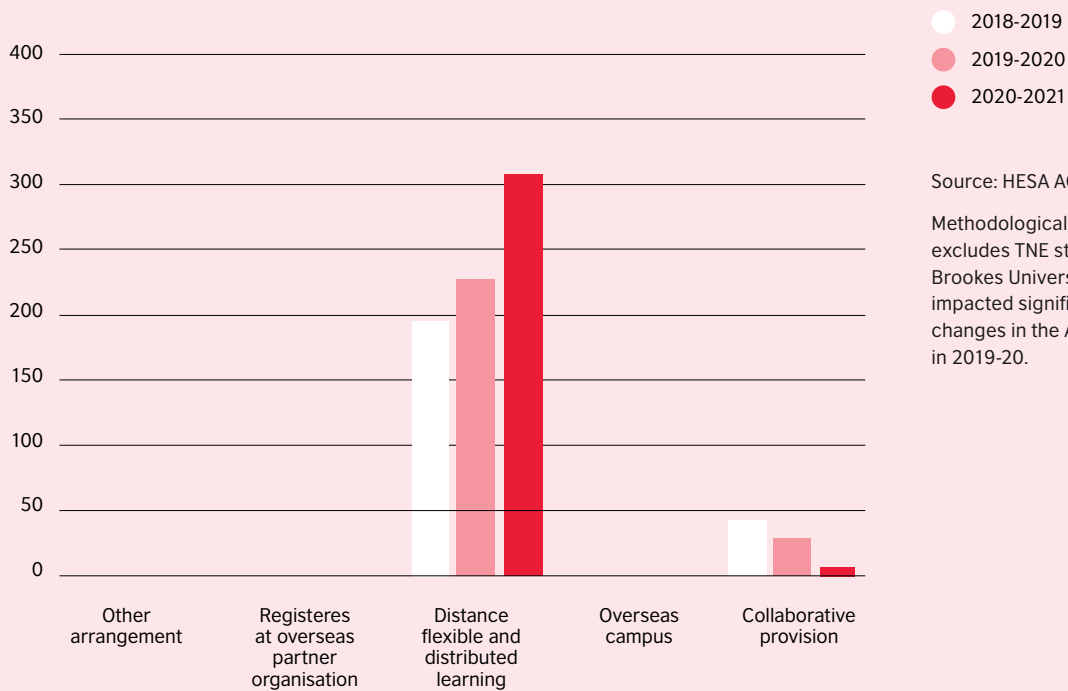
Saudi Arabia is advancing its higher education system. Quantitatively, the number of universities has jumped in the last 20 years from 7 to 42. Regarding quality, Saudi universities top the Arab world on popular universities rankings (Alarabiya, 2021). The very ambitious Human Capability Development Program (HCDP) of Vision 2030 puts a key performance indicator on the Ministry of Education to double the number of Saudi universities ranked in the top 200 universities, from three in 2019 to six by 2025. Other initiatives in HCDP are attracting international higher education and vocational institutions to Saudi Arabia, and introducing educational visas to market Saudi higher education as an attractive destination for international students, researchers, and professors on a global and regional level. To show the significance of and the nation's commitment to these new educational visas, the Council of Ministers swiftly approved issuing these in September 2022. It is no surprise then that the UK sees Saudi Arabia as a priority country because of the significant potential for educational partnerships and the requirements for reaching its potential (Department for Education and the Department for International Trade, 2021).

The UK is the second most popular study destination for Saudi students abroad. The number of Saudi students studying in UK institutions has

almost doubled between the 2019-20 and 2020-21 academic years. Of the 14,070 current Saudi students connected with UK higher education, 11,850 are studying in UK institutions, 2,000 are enrolled in the distance, flexible, or distributed learning, and a minority are studying on overseas branch campuses. Undergraduate degrees constitute the majority with 12,025 students. 1,805 students are studying for masters' degrees, 95 are pursuing doctorate studies, and 45 are on other undergraduate-equivalent programmes.

Partnerships between Saudi and UK educational institutions are longstanding and await expansion. Findings from this research point to policy, financial and institutional challenges. Current initiatives and local stakeholders, however, are working collectively to address these challenges through forthcoming regulations, currently in the stage of public consultation (National Competitiveness Centre, 2022). The British Council is very active in various engagements with local and UK stakeholders. The British Council can assist in addressing these challenges by helping partners to develop a well articulated vision for partnerships, ensuring instant communication and exploring unconventional models for funding TNE partnerships.

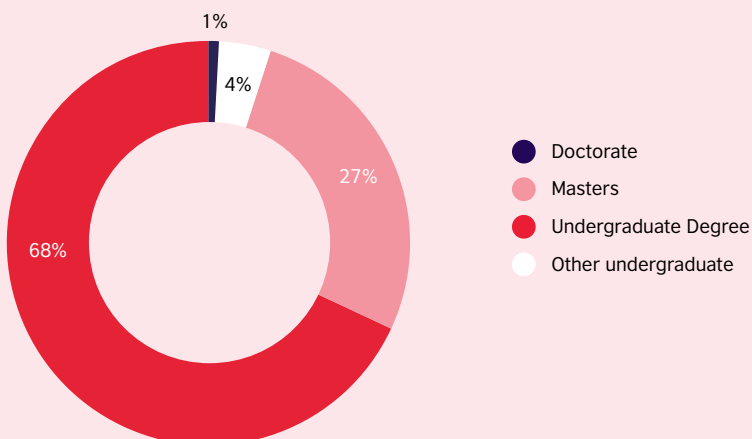
Figure 1: Number of TNE students from 2018-19 to 2020-21



Source: HESA AOR 2022.

Methodological note: The data excludes TNE students at Oxford Brookes University, which was impacted significantly by the changes in the AOR methodology in 2019-20.

Figure 2: The level of study of TNE students in 2020-21



Source: HESA AOR 2022.

Methodological note: The data excludes TNE students at Oxford Brookes University, which was impacted significantly by the changes in the AOR methodology in 2019-20.

3. Overview of International Collaboration Policy Landscape

Based on data from the Global Gauge of International Collaboration, there are notable improvements in the second round of 2022, compared with 2017. In terms of the international education strategy, HCDP (under the umbrella of Vision 2030) included an initiative to develop a framework to attract leading international universities and vocational institutions to open campuses in Saudi Arabia or establish partnerships with local institutions (HCDP, 2021). Moreover, HCDP specified an initiative to introduce educational visas to market Saudi Arabia as an attractive destination for international students, researchers, and professors at a global and regional level through an online platform to speed up international education mobility, which was approved in September 2022.

Furthermore, there are national and international dedicated bodies to support these initiatives. The Deputyship of International Collaboration and the Deputyship of Higher Education Affairs in the Ministry of Education work together to design and deliver international collaboration initiatives. In addition, non-educational bodies like the Ministry of Investment and Royal Commissions of large cities play a role in attracting foreign providers and operators. On the international front, 31 Saudi Cultural Missions liaise with foreign providers in host countries. All these bodies work jointly on preparing bilateral agreements at the state,

university, and collegial levels. In the last five years alone, more than 40 bilateral agreements have been signed focusing on executive programmes, research, and innovation.

Smoothing processes of programme and provider mobility is an essential part of HCDP. The Ministry of Education is working with local and international stakeholders on an executive regulation draft that specifically caters for foreign providers, whether to open branch campuses or provide programmes through current universities. Currently, around a dozen universities are offering joint programmes with foreign providers in different fields, for both undergraduate and graduate degrees. Technical colleges work with foreign partners and providers and are supervised by the Technical and Vocational Training Corporation. It is a work in progress to provide a framework that clearly specifies steps and procedures for foreign providers. Universities are permitted to establish branches abroad and deliver programmes based on a decree from the Council of Ministers. Currently, there are few branches set up and supervised by a specific deanship, but it is not common amongst universities.

Branch campuses or foreign universities are subject to quality assurance requirements set by the National Center for Academic Accreditation and Evaluation (NCAAA), which is part of the Education and Training Evaluation Commission (ETEC). Institutions are requested to go through the accreditation framework operated by NCAAA. While they have the liberty to obtain accreditation internally through ETEC, accreditation from other international quality assurance can be recognised by ETEC. NCAAA is very active in both institutional and programme accreditation, through contracts to accredit hundreds of programmes for local universities. In terms of technical education, the National Center for Training Assessment and Accreditation, which is part of ETEC too, applies institutional accreditation processes for all technical colleges, including those operated by foreign partners or contractors. ETEC in general and its affiliated centres are members of international quality assurance networks, such as the International Network for Quality Assurance Agencies in Higher Education.

Recognition of qualifications obtained outside Saudi Arabia is managed by the Ministry of Education through the Directorate of Equivalency, which processes thousands of qualifications using an online platform. Multiple review committees go through submitted qualifications based on clear rules and regulations that are simplified for applicants in a user guide. Applicants can submit objections and complaints about the recognition results through the online platform. The National Qualification Framework is in its first phase after it was officially adopted by ETEC in 2019. Saudi Arabia has adopted the Convention on the Recognition of Studies, Diplomas, and Degrees in Higher Education in the Arab States.

4. Environment for TNE

TNE policy in Saudi Arabia is evolving to attract more foreign providers. HCDP is headed by the Crown Prince, with a dozen ministers as members to give it a sense of significance. The international aspect at the heart of HCDP seeks to prepare citizens for the challenges and opportunities of the future global labour market. Three initiatives are linked to TNE. The first aims to attract international higher education and vocational institutions to open campuses in Saudi Arabia, or establish partnerships with local institutions, to increase the quality of offerings and enable knowledge transfer. Another initiative is introducing educational visas to market Saudi Arabia as an attractive destination for international students, researchers, and professors on a global and regional level.

The third initiative is a national scholarship strategy, a new phase of scholarships that contributes to raising the efficiency of human capital in the new promising sectors. The new scholarship scheme includes four tracks (Pioneers, Supply, Research and development, and Promising).

Bearing in mind this context, the participants in this research are optimistic about the future of TNE in Saudi Arabia. One of the positive developments is the bylaws under discussion to regulate TNE. In the draft that was recently discussed with stakeholders, there is an explicit focus on foreign providers willing to establish branch campuses in Saudi Arabia. Furthermore, it clarifies the recognition of qualifications issued by certified foreign educational institutions. Another

reason for optimism is the collective effort by multiple governmental bodies coming together, thanks to the new mechanisms of Vision 2030, to tackle obstacles and ensure a conducive business environment in Saudi Arabia, including TNE partnerships.

Saudi universities have established numerous partnerships in the last two decades, which could be seen as the golden era of higher education growth in Saudi Arabia. The number of public and private universities jumped from seven to 42. With this fast growth, international partnerships were perceived to ensure quality higher education.

There is a consensus among participants on the value and importance of transnational education and international partnerships. Cultural exchange is the most productive aspect of TNE. As one of the participants expressed it, 'international partnerships can be strongly beneficial both for the students, the faculty in Saudi Arabia, as well as the counterparts, because there's a strong cultural exchange with these kinds of programmes.' This aspect is not just cultural in its broad sense. Rather, it is the professional culture within universities; as a university vice-rector put it 'Definitely there was a great impact. These kinds of collaborations have impacted the culture of higher education in general. So, universities started embracing these new concepts, for example, accreditation and quality. These concepts definitely didn't exist before 2007.'

It seems that international partners contributed not just to the concept but also to the quality of several aspects of higher education. Saudi universities were adept in adopting and localising quality frameworks from prominent universities through 'serious attempts...to remodel their programmes and use identical or similar modelling of prominent universities'. These attempts extended to other practical aspects of curriculum redesign, teaching, professional development, and research. Research has increased in volume in the last 20 years, putting Saudi Arabia at the top rank of published research in the Arab World (Alarabiya, 2021). The focus on research was limited before these partnerships, and 'teaming up with international universities, as well as... the exchange of faculty encouraged institutions to focus more on research and development...whether it's the niche program[s] or classic program[s] as well.'

Universities' TNE journeys were not free of challenges, although the TNE environment is improving. The number of international partnerships decreased in the last five years because of changing needs, slow policy development and financial constraints.

As newly established universities emerged, they tended to seek support from established local universities rather than international partners to fulfil their needs. According to one of the participating professors:

'The well established universities in Saudi Arabia started exporting their expertise to more recently established universities, so these smaller universities no longer seek any kind of collaboration from international universities, as older Saudi universities, at a lower cost, can provide the required services.'

It seems that old local universities compete to meet the needs of newly established universities, even though the old universities themselves have international partners.

A policy development linked to approval processes of partnerships. Since the establishment of the Council of Universities Affairs in 2019, chaired by the Minister of Education and with relevant stakeholders as members, all proposed international agreements have to be approved by the council. This approval process requires more time and justification, and a level of scrutiny, which was not the case in previous years. Universities perceive this as centralisation of decision-making,

because universities ‘used to establish a memorandum of understanding and different kinds of collaboration agreements on their own through the university’s board.’ With this new policy change, however, ‘you have to correspond to different levels of authorities in order to approve these agreements, and in several cases, they were being disapproved.’ In addition, this centrality led to continuous changes in the criteria for approval that added more time to that needed to establish a collaboration. On the other hand, some acknowledge the reason behind this centralisation:

‘...there have been some kind of out of control agreements where some universities sought a certain kind of collaboration from universities or from educational providers that are not up to the desired level. So, it has to be governed in a certain way. It has to be centralised, but not to that extent. It’s being completely controlled now by the Ministry.’

Another challenge mentioned in the interviews linked to the availability and clarity of regulations for establishing a partnership and having its exit qualifications recognised by the Ministry of Education. This vagueness affects not just both partner institutions, but also most importantly the students, in the case of a joint programme partnership with an international provider. Therefore,

‘you cannot risk, as a provider, to go through that path and you promote to students and tell them, OK, let’s have a half degree that you study here and half of it done studying in X&Y and Z university, and then they come back with two, two certificates, but then they won’t be accepted or recognised by the [Ministry of Education].’

Having said that, there is an acknowledgement of the Ministry of Education’s efforts to pave the way for TNE partnerships: ‘They are still currently working on the regulations for regulating this part. Yeah, there is a huge push towards expediting the process. But these things require time and discussions and, of course, consequences.’

Financial aspects also seem to affect partnerships, particularly in the last five years. Previously, universities had a part of their budget from the Ministry of Finance allocated to international partnerships. This has changed to universities being responsible for funding these partnerships through self-sustaining models, rather than relying on a governmental fund. Even if, in some specific cases, the universities can secure government funding, it must go through thorough negotiations to ensure expenditure efficiency with representatives from the Expenditure and Projects Efficiency Authority, established to ensure efficiency.

Financial challenges also apply to students and parents. Higher education in Saudi Arabia is subsidised by the government, and students receive monthly allowances during undergraduate studies. This can be problematic for joint programmes with an international partner that ask for tuition fees: 'still the majority (around 90 per cent) of people are still accustomed to not paying for college degrees, so that might be a barrier, especially if the fees are high.'

Because of these financial constraints, universities have to adapt and find new business models for partnerships. One university explained this challenge to a partner from the UK that provides professional development for its faculty. Instead of getting payments from the university as before, the two sides agreed on another model whereby faculty members pay a discounted fee directly to the foreign provider.

The last financial aspect mentioned by interviewees was the high charges asked by international providers. While universities could afford and accept this in the past, the situation has changed. Universities now must fund the partnerships and, as aforementioned, if they cannot afford the cost, they might fulfil their needs from local providers.

TNE partnerships require a clear vision and dedicated leadership; otherwise, they will lack sustainability. Interviewees emphasised that some partnerships are short-lived 'because many times it's not clear what the end is in mind, the metrics cannot be measured, and the final vision of outcomes stop here. So, I think that it's very important to have the outcomes of TNE very clear in the beginning.' Setting a clear vision and outcomes start with understanding the market needs:

'...addressing the local labour market needs is the key for the success of both parts of all partnerships and all partnership models. So, for example, university program[m]s might succeed in one location but might not succeed in the other. A specific program[m] offering might be highly demanded right now, but might not be demanded in the next five or ten years...'

Part of the clear vision, too, is to know the current and future skills gaps. There are some priorities identified according to Vision 2030, and the Ministry of Investment plays a role in ensuring that international providers are aware of these priorities: 'Transnational education needs to consider the contextual aspects and the future requirements of [Saudi Arabia] and the uniqueness and competitive advantage of their own. Then you need to consider the local and future perspective of [Saudi Arabia] on what they are offering.'

In addition, the vision and partnerships should be aligned right from the beginning with quality assurance frameworks advanced by the Ministry of Education and ETEC. Some programmes were rushed, which led to students facing challenges in continuing their studies or getting their qualifications recognised. As explained by one of the participants:

‘What makes or breaks international partnership is aligning with quality assurance frameworks in the beginning in order to maintain a successful and flourishing partnership. So quality assurance, I believe, is a key challenge for universities if it was ignored or delayed. Both local and international partners need to develop a mutual understanding of the quality assurance framework that they will be following.’

Another caveat or barrier is relying on an individual’s passion to establish partnerships, rather than institutional teamwork supported by leadership and faculty. One participant who worked in two public universities and as an advisor in a private university stressed this, saying;

‘I think that if there is a committee rather than an individual person, it would [be] much stronger for dedication in from a limited group of people who initiates a partnership or a joint program[me] with no definition of a long-term relationship. Unfortunately, it begins to die down, while it was very, very nice. The lesson here, I think, these partnerships need to have a very strong team and strong commitment for the long term.’

An issue of concern is the recognition of qualifications obtained in partnerships with foreign providers. There is a consensus amongst interviewees that degrees obtained from UK institutions are credible and highly valued in both governmental and private sectors. One participant who was involved in establishing and overseeing a joint programme with a UK partner pointed out that ‘All the labour market will prefer a degree obtained from an international institution. They won’t go in a very deep in the degree details that’s obtained from a highly respected institution. People usually look if this person actually got the skill sets that are necessary for the market’.

There are concerns, however, with online or hybrid degrees. The stance on online education is still lacking official approval and:

‘If you are studying a single course in your degree that’s online, it’s not approved. Specifically, if you are studying abroad and coming to equalise your studies, and we know friends who went through this process and their certificates were not recognised because they studied part of their program[me] online.’

Having said that, and as a result of Covid-19, online education is more accepted and ‘now it is shifting, and it should be. We’ve seen it, and this is a very good progress... So, I think they need to shift if they want to solve it, they need to study it from an investment perspective.’

5. Impact of Covid-19 on TNE

When Covid-19 arrived in late 2019, education was profoundly affected, and most institutions switched to online education. The readiness for this switch varied between countries and institutions. Those institutions with established partnerships were faster in using online education because they were accustomed to this model. In one technical college, the international partners played a significant role in assisting the institution to swiftly move to e-platforms. We might borrow here the saying that 'a partner in need is a partner indeed', according to one of the participants. He further explains:

'...when we moved during Covid from the normal training to online, all the providers helped us because they have their own system ready in place in their home country [...] All of the students transferred smoothly from day one. Our providers have a good system to follow up with the students. Most of our students graduated during Covid according to their plans [...] You could write a book about the experience of Covid-19 with the international providers and how they transferred from the normal to the online teaching, and maybe mixing teaching online with in-site college teaching.'

Although partnerships did not expand during the pandemic, they stayed the course and emerged as disruption-proof. Moreover, although international partnerships were not intentionally overlooked during the pandemic, 'Covid slowed down the international collaboration because people were very busy with other things, not because it was intentional to slow down, but because there were other pressing priorities on both sides.'

Nevertheless, Covid positively affected higher education in a way. Online education and exams, as well as online degrees, are being perceived differently.

'...now the acceptance is extremely high of online degrees in which previous people in education would not accept. People that got an online degree, regardless of whether it was from Harvard or any other prestigious place, as long as it's online. Now it's much more accepted and it's understandable that you get an online degree that is a reputable degree and not necessarily, you know, one of these degrees that are perceived as purchased degrees.'

The pandemic has contributed to paving the way to expanding TNE partnerships via online interactions that are cost-efficient and credible. Because of the pandemic experience, 'people have understood the importance of international collaboration, and it's opened their eyes to it.'

6. Recommendations

Interview findings show that the environment for higher education partnerships and technical training in Saudi Arabia is improving. Multiple actors are contributing collectively to these improvements. Solutions to the identified challenges are, in a way, orchestrated by Vision 2030's programmes and initiatives. Still, partners from both sides have a role in overcoming challenges to establish and sustain TNE partnerships.

A well-articulated vision of the partnership will make it successful and sustainable. Vision 2030 and HCDP heavily stressed the future skills needed in the Saudi labour market. The Ministry of Human Resources and Social Development is the main owner of the initiatives to define these skills and ensure alignment with local stakeholders, including the Ministry of Education. One of the recently announced initiatives is the Scholarship Program Strategy, which contains four tracks to fulfil the skills needed for a future flourishing economy.

Collective policy development is an essential element of the 'efficient government pillar' of Vision 2030. The mechanism embedded in Vision 2030 ensures that all internal governmental stakeholders are aligned in policy development. On the other hand, public consultations are maintained through the Public Consultation Platform hosted and operated by the National Competitiveness Center. Two other participant,

however, deserve further engagement. Local investors in TNE play a major role in policy implementation and need to be aware of, and heard in, policy development discussions. International providers, too, can augment local views based on their experiences and practices in other countries.

Communication is essential to fruitful partnerships. Communication does not have to be one-sided with Saudi partners. International stakeholders, too, might maintain an open channel with Saudi Cultural Bureaus in their country. International providers can make their offerings, particularly unconventional programmes, known to the bureau, which usually liaises with and gets requests from universities. International partners can also open multi-level communication channels with other Saudi bodies beyond the Ministry of Education. For example, the Ministry of Investment, the Ministry of Human Resources and Social Development and the newly established Royal Commissions all have their own key performance indicators on high-quality education and look for services from international partners. Communication can be more efficient with a facilitator being aware of both sides. The British Council is well positioned to play this facilitation role.

Funding is a critical issue to tackle. While international partners are more comfortable with the straightforward traditional partnership, the client-provider model is not the only model that works. Saudi universities are pushed towards exploring more efficient business-oriented models. Once the regulations are clear and settled, both sides can work on a joint venture model where each side maintains its part of investing in the partnership. The Saudi partner ensures the fulfilment of the demand that justifies the investment. On the other side, the international partner should expect a long-term relationship rather than a one-shot service. Both Saudi universities and technical colleges have tried out new models that are promising to be sustainable. In addition, some neighbouring countries in the Gulf Cooperation Council have adopted other successful models that might apply to the Saudi context.

Continuous market research, like this project, will help identify the challenges and possible solutions as it complements other recommendations. The British Council is highly praised in Saudi Arabia for its forward engagement and outreach to all stakeholders. Research findings from this project, whether from the Saudi context or other countries participating in this project, would help understand the challenges and draw on the lessons learnt.

Findings in this report draw mainly on interviews conducted in March 2022. The nine participants represent stakeholders from governmental entities, quality assurance bodies, public and private universities, and technical education.

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