THE FUTURE OF STUDENT RECRUITMENT IN THE MIDDLE EAST – UPDATES ON BAHRAIN, JORDAN AND IRAN

Nabil Najd
Manager MENA Region

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Session Speakers

- Arwa Tayem Due-Gundersen - Director of International Relations of Oval Office for Studies & Research, Jordan
- Suad Alhalwachi - CEO of Education Zone, Bahrain
- Toufic Lawand - CEO of Lawand Education, International
General information

- **Official Name:** Middle East and North Africa
- **Number of countries:** 25
- **Language:** Mainly Arabic, Iranian
- **Government Type:** Monarchy mostly, very few democratically voted governments
- **Population:** 523 million
- **Ethnic Groups:** Asian, European, American, British live and work in the MENA region
- **Economy:** Oil and gas and natural resources
# Population Size & Growth in the MENA Region

**Population Size and Growth in the Countries of the Middle East and North Africa: 1950, 2007, and 2050**

<table>
<thead>
<tr>
<th>Country and region</th>
<th>Population in thousands</th>
<th>Ratio of population</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Middle East and North Africa (MENA)</strong></td>
<td>103,886</td>
<td>431,587</td>
</tr>
<tr>
<td>MENA–Western Asia</td>
<td>51,452</td>
<td>215,976</td>
</tr>
<tr>
<td>Iran</td>
<td>16,913</td>
<td>71,208</td>
</tr>
<tr>
<td>Iraq</td>
<td>5,340</td>
<td>28,993</td>
</tr>
<tr>
<td>Israel</td>
<td>1,258</td>
<td>6,928</td>
</tr>
<tr>
<td>Jordan</td>
<td>472</td>
<td>5,924</td>
</tr>
<tr>
<td>Lebanon</td>
<td>1,443</td>
<td>4,099</td>
</tr>
<tr>
<td>Palestinian Territory</td>
<td>1,005</td>
<td>4,017</td>
</tr>
<tr>
<td>Syria</td>
<td>3,536</td>
<td>19,929</td>
</tr>
<tr>
<td>Turkey</td>
<td>21,484</td>
<td>74,877</td>
</tr>
<tr>
<td><strong>Arabian Peninsula</strong></td>
<td>8,336</td>
<td>58,544</td>
</tr>
<tr>
<td>Bahrain</td>
<td>116</td>
<td>753</td>
</tr>
<tr>
<td>Kuwait</td>
<td>152</td>
<td>2,851</td>
</tr>
<tr>
<td>Oman</td>
<td>456</td>
<td>2,595</td>
</tr>
<tr>
<td>Qatar</td>
<td>25</td>
<td>841</td>
</tr>
<tr>
<td>Saudi Arabia</td>
<td>3,201</td>
<td>24,735</td>
</tr>
<tr>
<td>United Arab Emirates</td>
<td>70</td>
<td>4,380</td>
</tr>
<tr>
<td>Yemen</td>
<td>4,316</td>
<td>22,389</td>
</tr>
<tr>
<td><strong>Northern Africa</strong></td>
<td>44,099</td>
<td>157,068</td>
</tr>
<tr>
<td>Algeria</td>
<td>8,753</td>
<td>33,858</td>
</tr>
<tr>
<td>Egypt</td>
<td>21,834</td>
<td>75,498</td>
</tr>
<tr>
<td>Morocco</td>
<td>8,953</td>
<td>31,224</td>
</tr>
<tr>
<td>Libya</td>
<td>1,029</td>
<td>6,160</td>
</tr>
<tr>
<td>Tunisia</td>
<td>3,530</td>
<td>10,327</td>
</tr>
</tbody>
</table>

* Projected

The MENA region will continue to post double-digit average growth of around 5% annually in the next five years.

Institutions must be patient.

The Middle East does not have a longstanding capitalist culture.

Business set-up time can be a longer than would be expected in the West.

MENA region is generously endowed with lavish natural resources and a young population with 70% under the age of 30.

The region offers educational opportunities.
The Education System of MENA - Achievements

- MENA has taken great strides in education
- Achievement of almost complete gender parity for primary education
- Enrolment in the region’s school systems has increased significantly over the past decade
- Achievement of the universal primary education for girls and boys in most of the MENA countries
- Literacy rates for the adult population (defined as 15+ years) have increased from 59% in 1990 to 78% in 2010
- Government Financing Commitment: The average public investment in education across the region as a percentage of GDP is above 5.3% of GDP
The Education System of MENA - Challenges

1 Educational quality
   - Low educational quality of school systems in MENA
   - Basic skills are not being learnt

2 Skills Mismatch
   - Pervasive mismatch between the skills required by the job market and those taught in schools
   - More firms in MENA contend that inadequate labor force skills, both technical and soft, impede their growth and ability to hire employees
### Middle Eastern Students Abroad
*(Based on UNESCO data 2012)*

<table>
<thead>
<tr>
<th>Country of origin</th>
<th>Number of students abroad</th>
<th>% of all mobile students</th>
<th>Top destination Countries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Saudi Arabia</td>
<td>62,535</td>
<td>1.8%</td>
<td>USA, UK, Australia, Canada</td>
</tr>
<tr>
<td>Iran</td>
<td>51,549</td>
<td>1.5%</td>
<td>Malaysia, USA, UK, Italy</td>
</tr>
<tr>
<td>Jordan</td>
<td>16,825</td>
<td>0.5%</td>
<td>USA, Ukraine, UK, Australia</td>
</tr>
<tr>
<td>Lebanon</td>
<td>13,089</td>
<td>0.4%</td>
<td>France, UK, USA, Australia, Canada</td>
</tr>
<tr>
<td>Kuwait</td>
<td>10,686</td>
<td>0.3%</td>
<td>USA, UK, Canada</td>
</tr>
<tr>
<td>Oman</td>
<td>10,049</td>
<td>0.3%</td>
<td>UK, USA, Australia</td>
</tr>
<tr>
<td>UAE</td>
<td>8,526</td>
<td>0.2%</td>
<td>UK, Australia, USA, Canada</td>
</tr>
<tr>
<td>Bahrain</td>
<td>4,096</td>
<td>0.1%</td>
<td>UK, USA</td>
</tr>
<tr>
<td>Qatar</td>
<td>3,410</td>
<td>0.1%</td>
<td>UK, USA</td>
</tr>
</tbody>
</table>
Which Programs are interesting for MENA Students?

- Business: 33%
- Engineering/Architecture/Aviation: 20%
- Medicine/Dentistry: 13%
- English: 9%
- Health Science/Medical Sciences: 6%
- Computer science/IT: 6%
- Arts/Humanities/Education: 5%
- Design/Other trades: 3%
- Law/International Relations: 2%
- Media & Mass Communication: 2%
- Science: 1%
- Law/International Relations: 2%
- Design/Other trades: 3%
- Arts/Humanities/Education: 5%
- Computer science/IT: 6%
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Recruitment from the Middle East – The Jordanian Market

Ms. Arwa Tayem Due-Gundersen
Director of International Relations
The Oval Office for Studies and Research

ICEF Berlin 2016
Facts about Jordan

Location

Population

Million

Jordanian 6.3
Other 3.7
Educational system

- The K to 12 Program covers Kindergarten and 12 years of basic education (six years of primary education, four years of Junior High School, and two years of Senior High School [SHS]) to provide sufficient time for mastery of concepts and skills, develop lifelong learners, and prepare graduates for tertiary education.

Market size - MOHE

- 81000 Students graduates every year
- 18000 Studying abroad
- 10000 for Medicine
- 3000 other subjects
- 5000 Graduate
Why to study and where?

Benefits

- Better Education
- Better Career Opportunities
- Cultural Experience
- Learn a New Language
- Prestige

USA, Germany, Australia, Ukraine and Malaysia

Factors to choose the educational destination and University MD, Eng, Business and technology are the most popular
Jordan and Recruitment Destinations
We change the world one educated person at a time!
The Future of Education in Bahrain

ICEF- Berlin
2016

www.ezone.ae
Effect of vision 2030 on Bahrain education market
Effect of oil prices on the scholarships
Increased number of universities and language schools in Bahrain
Statistics
Trivia

• How many people know the size of Bahrain? And where it is on the world map?
• What is the population of Bahrain?
• 770 kmsq, 33 islands and its near KSA and Qatar. A causeway links Bahrain to KSA
• According to the official census for the year 2010 issued by the Central Informatics Organisation, the Kingdom of Bahrain had a total resident population of 1.23. The estimated population of 2014 was 1.316 million people. It is expected to reach 1.592 million in 2020 and 2.128 million in 2030, up from 621 thousand in 1999. The population growth rate is 7.4% on average.
(http://www.mia.gov.bh/en/Kingdom-of-Bahrain/Pages/Location-and-Natural-Resources.aspx)
General Information
• **Official Name:** The Kingdom of Bahrain
• Number of Islands: 33
  **Language:** Mainly Arabic, Iranian, Indian, Pakistani, Philippine, western languages
  **Government Type:** Monarchy
  **Population:** 1.3 million
  **Ethnic Groups:** Asian, European, American, British, etc. live and work in Bahrain
• **Economy:** Oil and gas and natural resource, offshore banking and investment
• Dependence on investments (vision 2030)

Bahrain – The Education System

- Improved tremendously and quality assured
- Compulsory education
- Professionalization of teachers
- Educational materials
- 217 government schools and 225 private schools
- Over 41000 students graduated in 2014-2015
- Over 14000 joined local colleges and universities
- How many went overseas? Well according to QS (http://www.topuniversities.com/blog/middle-eastern-students-abroad-numbers) almost 5000 from Bahrain go abroad. No data to confirm this number, however:
  - 4,096 went to (UK (1,112); Jordan (673); UAE (535)) (http://www.moe.gov.bh/archive/statistics/2015/6.pdf)
• Students finish schools lacking appropriate foreign language proficiency
• Most schools have 12 years of education, so certain universities will require the students to do a foundation year
• Students lose a minimum of 2 years before joining a university
Effect of oil prices on the scholarships

- Reduced to a minimum
- The ministry is sending less than a 100 students abroad, and most scholarships are directed to local universities
- Employee scholarships abroad also reduced to a minimum (like land department went to zero)
Increased number of universities and language schools in Bahrain

- Large investments in Higher education from Private sector
- The accrediting bodies ensure that those that want to open are ethical institutions and accreditation is very difficult
- There are less than 30 universities in Bahrain
- There are over 53 training and language centres in Bahrain
Scholarship Providers

- Ministry of Higher Education
- Ministries of Labour
- Ministries of Health
- The public universities
- Private foundations
- Multinational companies like ALBA
- Petroleum companies
Online and distance education is not approved in most of the MENA region. Only 30% of total curriculum can be by distance.

In Bahrain Online and distance is almost not approved.

Many organisations provide qualifications/training courses for working adults.

An area that is worth exploring.
• Going abroad is a tradition (I went abroad in the 70s)
• The Ministry of Higher Education provides lists of the recommended higher education institutions abroad.
• Students wishing to complete their higher education must obtain the approval of the ministry before the enrollment
Which Programmes are interesting for Bahrain Students?

• Medicine
• Engineering
• Business
Students Data (based on our records)
SPECIALISATION – PROGRAMS OF INTEREST

- Medicine: 38%
- Engineering: 21%
- Business/Management/Economics/Marketing: 11%
- English Language: 5%
- Science: 2%
- Media/Film: 1%
- German Language: 1%
- School: 0%
- Law: 4%
- IT: 4%
- Others: 5%
- Accounting/Finance: 4%
- Architecture: 2%
- Art/Design: 1%
- Aviation: 1%
- Biology: 0%
IRAN - Population, Economy, Education System

(Data sources: UIS, World Bank, IMF, WES, IIE, Iranian press)

QUICK FACTS
- **Area**: 1.68 m km² (18th)
- **Population**: 80 million (UN estimate - 17th)
- **Median Age**: 30.1 years
- **Annual growth**: 1.2%
- **Urbanisation**: 75% - Tehran about 9m
- Founding member of OPEC

EDUCATION SYSTEM
- Number of upper secondary schools: > 22k
- School education is free right through state secondary school, and mandatory for primary school grades
- Universities: 309 campuses (Islamic Azad University 129 campuses)
- Expenditure on education 19.67% of total Government expenditure, of which 28.31% is on higher education
- Enrolment rate in higher education: 65.96%
- Highest ranking university
  - Iran University of Science and Technology: 57th in Asia and 501-600th in World (Times HigherEd)
  - University of Tehran: 411th in World (webometrics)

ECONOMIC OUTPUT (GDP)
- **Value**
  - Nominal: $416.5 billion
  - PPP: $1.357 trillion (IMF, 2014 est.)
- **Rank**
  - Nominal: 29nd
  - PPP: 18th
- **Growth**
  - 1.6% (2015e)
  - 4.4% (2016f)
  - 4.9% (2017f)
- **Per Capita**
  - Nominal: $4,769 (96th)
  - PPP: $17,400 (71st) (IMF, 2014 est.)

School-age population of 21,875,747 (UIS 2014)
IRAN - Current Status of Study Abroad Market

(Data sources: UIS, World Bank, IMF, WES, IIE, Iranian press)

Various data but, according to UNESCO, number of Iranian Students Abroad in 2012 was 51,549
(second largest in Middle East, after Saudi Arabia’s 62,535)

Some data points to Malaysia being the largest destination for Iranian students (Project Atlas quotes Malaysia’s MoHE claiming Iran is #1 source market of international students to Malaysia, at 11,823 students).

Here, we are using data from UNESCO here, to show the top 10 destinations for Iranian students (reference year 2014)

According to IIE’s Opendoors report 2015, 79.2% of Iranian students chose STEM fields of study in USA, compared to 44% of all international students in the USA.

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IRAN - Future Potential & Trends
(Data sources: UIS, World Bank, IMF, WES, IIE, Iranian press)

In 1979, Iran was the leading sender of international students to the United States, with more than 51,000 students enrolled in U.S. universities alone!

Now, Iran ranks twelfth leading country to send international students to the United States.

Since mid-2015, there has been invigorated educational diplomacy such as:
- IIE Iran Higher Education Initiative in 2015
- the Australian Minister for Trade leading an Australian delegation to Tehran in October 2016

A large majority of the Iranian elite (Government, Academia, Business) were educated abroad (mainly in the United States) and many of their children are currently pursuing degrees at U.S. colleges and universities.

A large percentage of Iran’s population falls in the Higher Education age bracket (20-35), with over 60% under the age of 35.

In Iran, people think that studying abroad, especially in First-World countries, is the best way to improve their knowledge and to have better opportunities in life.

Iran is ranked as an upper-middle economy by the World Bank.
IRAN - Future Potential & Trends

(Data sources: UIS, World Bank, IMF, WES, IIE, Iranian press)

Due to many years of sanctions imposed on Iran, the country has been starved from access to information and knowledge resources, so Iran was left out of developments in the world, and it feels it has fallen behind as a result, so there is a big thirst for knowledge which can be derived from Higher Education in developed countries.

There has been a strong need for Higher Education in Iran over the past few years, to lift the country from its current economic situation.

The lifting of the sanctions has opened up many opportunities for global companies to enter Iran. When these global companies hire staff in Iran, they prefer Iranian employees who have language skills as well as suitable qualifications; so there is demand for second and even third international language programs as well as up-to-date globally-recognised qualifications - all of which are best acquired abroad.

Iran’s government needs educated people to embark on education, health, infrastructure, and other nation building programs.

Iranian government has some scholarships, especially for PhD applicants, to study abroad.

Iran can be the world’s second largest exporter of oil, has the world’s third largest reserves of oil, has the world’s second largest reserves of gas, and its foreign assets have been unfrozen when the sanctions were lifted.

FINALLY...

Student visa: for example, Lawand Education is leading a group of Australian universities to lobby the Australian Minister for Trade and Minister for Immigration about current consular practices.

CHALLENGES
Thank you for listening
We welcome your questions!