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Higher education in the United Arab Emirates: an analysis of the outcomes of significant increases in supply and competition

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During the last decade, several countries across the Middle and Far East have established higher education hubs, some of which have grown rapidly by attracting foreign universities to set up international branch campuses. The United Arab Emirates (UAE) is by far the largest host of international branch campuses globally, having over forty providers at the end of 2009. The UAE higher education market has become highly competitive and, in the private sector, supply currently exceeds demand. This paper explores and analyses the outcomes and impacts of this market situation on student recruitment, the student experience, quality and institutional strategies. The long-term viability of international branch campuses in the UAE is also considered, in the context of local political and social issues.

Keywords: United Arab Emirates (UAE); higher education hub; international branch campuses; competition; quality assurance

Introduction

The United Arab Emirates (UAE) has a population of just under 5.07 million (UAE Interact, 2009) and in excess of sixty universities and colleges of higher education (National Media Council, 2009). It has been suggested in the local media that the supply of places in higher education in the UAE already exceeds demand (Moussly, 2010). However, it is not the ratio of number of colleges or college places to population alone that indicates a potential problem for the institutions already operating in the UAE. The urban area of Boston, Massachusetts, with a population of just over four million, supports over one hundred colleges and universities. Boston can be considered an education hub, attracting students not only from all over the United States but also from all over the world. The UAE aims to do likewise, at least on a regional basis. However, the UAE is not alone in such ambitions. During the last decade, new higher education hubs have sprung up in a number of countries, including Qatar, a neighbouring country to the UAE on the Arabian Gulf, and Singapore and Malaysia in the Far East.

The new higher education hubs have grown rapidly, largely by attracting universities from countries with established higher education sectors to set up branch campuses. At least 49 international branch campuses have been established in the last three years, and there are now at least 162 globally (Becker, 2009). American, Australian and British universities have particularly benefited from the process of

globalisation that has occurred in higher education, as the countries in which they are based have generally well-regarded systems of higher education and because English has become the lingua franca in international higher education. A survey of students taking a British qualification at two institutions in the UAE and Sultanate of Oman found that 62 per cent of the sample believed that the UK offered the best higher education worldwide (Wilkins, 2001). There are a number of ways in which universities can gain a presence in foreign countries, including the operation of study centres, the franchising of programmes to local providers, the delivery of distance learning programmes and the establishment of international branch campuses.

The term 'international branch campus' implies a bricks and mortar approach, whereby an institution has a physical presence in a foreign country. Students receive their education in premises owned or leased by the foreign institution, either solely or jointly with a local partner, and, in addition to rooms for teaching, a branch campus might typically also have a library, a refectory, recreational facilities and student accommodation. A branch campus always uses the name of the foreign institution and offers complete undergraduate and/or postgraduate programmes, usually in a number of different subjects. Students are recruited from the local or surrounding regions. They follow the same, or at least usually very similar programmes to those delivered at the home campuses, and, on completion of their studies, students are awarded a degree from the foreign university.

International branch campuses are staffed in a number of ways, including transferring faculty from the home campus on a permanent or fixed-term basis, having faculty from the home campus fly out for short periods at a time, and the recruitment of new faculty specifically for the branch campus, either on a full-time permanent or fixed-term basis, or part-time basis. Each of these methods has advantages and disadvantages, which shall be discussed later. The international branch campus is easily confused with other types of overseas higher education provision, such as satellite campuses, study centres and franchised courses provided solely by local institutions, but there is not yet global consensus on a concise definition for the term. In fact, Altbach (2010) argues that most international branch campuses are not really campuses at all, because they are small, specialised and offer limited academic programmes.

Host countries, and universities from countries such as the United States (US), Australia, United Kingdom (UK) and Canada have eagerly embraced the international branch campus model. Al-Lamki (2002) observed the rapid mushrooming of private two-year colleges in the Sultanate of Oman after the issuing of a Royal Decree in 1996 that permitted the establishment of private colleges. Private sector providers have been relied upon heavily to increase higher education capacity in several of the Gulf States. In 2006, three of the four universities in the Sultanate of Oman were privately owned (Mazawi, 2008). The UAE, however, is by far the largest host of international branch campuses globally, with over forty providers in 2009 (Becker, 2009).

Aims and methodology

Higher education hubs, comprising a number of international branch campuses, represent a new and untested educational model. It is only recently that we have begun to see the effects and outcomes of this model, which aims to increase higher education capacity in less developed nations or nations with less developed tertiary education. This paper analyses these effects and outcomes, and the implications for foreign providers already operating in the UAE, or for those still considering setting up in the

country. The UAE is a particularly interesting case study because it is the largest higher education hub of international branch campuses globally and because of the speed at which foreign institutions rushed to set up in the country.

Any efficient market needs the 'right' balance of supply and demand, but it is clear at the start of 2010 that both the public and private higher education sectors in the UAE do not have the 'right' balances. This market failure can harm students, businesses, the education providers themselves and UAE society in general. By conducting a review of the literature, this study identified some of the major outcomes of these market imbalances. A variety of stakeholders have an interest in the quality of higher education in the UAE, including students, parents, employers and the UAE government. If international branch campuses do not achieve standards of quality comparable with their parent campuses, then it is quite possible that the branch campuses will fail to attract students in sufficient numbers to enable their survival. For this reason, quality assurance and quality issues have been examined in greater detail.

Development and structure of higher education in the UAE

The UAE was established as a federal state in 1971 by agreement of the rulers of the seven emirates that now make up the UAE. At this time, the country's education was delivered through 74 schools. There was no university. After the establishment of the UAE, the country's education system was developed based on the British model (Kirk & Napier, 2009), although, more recently, aspects of the US system have been adopted. For example, the quality assurance standards used at the federal level are based on a US model. The UAE University, established in 1977 in Al Ain, was the first institution of higher education to be created in the UAE. Then, in 1988, the Higher Colleges of Technology (HCT) were set up to offer mainly vocational and technical programmes, although they now offer a wide range of courses including undergraduate and postgraduate degrees. The HCT currently has a network of 16 campuses across the country, with separate colleges for males and females. Zayed University, established in 1998 with campuses in Abu Dhabi and Dubai, was the third and final institution to be established by the federal government. The three higher education institutions (HEIs) controlled by the federal state are known as the 'public' or 'federal' institutions; all of the others are referred to as 'private' institutions.

Article 23 of the UAE constitution recognises the role of education in national development, and the federal government has pledged that education shall be provided free of charge to UAE nationals at all levels. As a result, all UAE national school leavers are entitled to attend one of the three federal HEIs if they meet the entry requirements. The government's commitment to education was demonstrated in 2001 when the largest single allocation of federal funds was for the provision of education for UAE nationals (Godwin, 2006). However, the grants given to the three federal HEIs have remained static in many of the years since.

The private universities fall into one of two categories: they are either owned and controlled locally, by individual emirates or local organisations, or from abroad, by foreign institutions of higher education that have established branch campuses. Examples of private locally owned universities include the American University of Sharjah, established by the ruler of Sharjah in 1997; the University of Dubai, established as Dubai Polytechnic by the Dubai Chamber of Commerce and Industry in 1997; Paris-Sorbonne University Abu Dhabi, established by the Abu Dhabi Education Council in 2006; and Al Ghurair University, owned by the Al Ghurair Group, a

company with diverse interests, which include a bank, a shopping mall and a cement business.

The first international branch campus was established in Dubai in 1993 by the University of Wollongong, a well-regarded university from Australia. Many others have since opened, including Middlesex University and Heriot-Watt University from the UK, and the University of Pune, one of India's top-ranked state universities, which established a campus in the free trade zone of the emirate of Ras Al Khaimah in 2009. More recently, New York University and the government of Abu Dhabi have formed a partnership to create New York University Abu Dhabi, which enrolled its first students in August 2010. The government of Abu Dhabi will fund the UAE institution, so financial resources will not be diverted from the university's campus in New York.

Supply and demand for higher education in the UAE

Of the UAE's 5.07 million population, less than 20 per cent are UAE nationals; the remainder are expatriates (UAE Interact, 2009). The largest source countries of expatriates are India (1.75m) and Pakistan (1.25m). Approximately 500,000 residents are regarded as 'western' expatriates, from Australia and countries in Europe and North America. The UAE's population was estimated to have increased by 6.3 per cent in 2009 (UAE Interact, 2009). Although expatriates accounted for more of this increase than UAE nationals, the number of nationals still increased by just under 4 per cent. Cultural and religious influences keep the UAE birth rate relatively high, although it is now far lower than the 10-15 per cent annual growth rates seen in the 1970s and early 1980s. The high birth rates of UAE nationals in the 1970/80s, combined with an increased recognition of the value of higher education, has resulted in a substantial increase in demand from nationals for higher education since the early 1990s. The UAE University enrolled 400 students in 1977 when it was established (Hijazi *et al.*, 2008); it now has over 12,000 students.

The UAE government's pledge that every UAE national school leaver who satisfies the entry requirements of the three federal HEIs will be guaranteed a place, has put tremendous pressure on these institutions to expand capacity. Between 2003 and 2008, for example, the number of students enrolled at Zayed University increased by 52 per cent, but during the same period the funding received from the federal government was broadly constant each year (National Media Council, 2009). The public HE sector has not expanded quickly enough, and as a result it is believed that thousands of UAE nationals have been denied places at the federal universities in recent years (Bardsley, 2009). Only a relatively small number of expatriates are admitted into the public HEIs.

The leading universities in the UAE have shown a greater determination during the last few years to produce high quality, world-class research. The UAE University, for example, aims to achieve a significant improvement in its placements in regional research and world university ranking tables over the next five years. It is, however, unable to invest more into research projects and developing new PhD programmes, as well as increasing capacity of undergraduate programmes, without increased government funding. The vice chancellor of UAE University recently threatened to reduce the university's workforce by 7 per cent (200 positions) as a solution to its funding dilemma (Bardsley, 2010c). The job cuts, if they went ahead, would involve both academic and support roles. Zayed University has also recently suspended the launch of a new research centre. International branch campuses operating in the new education hubs across the Middle and Far East are facing increasing pressure from their

partners and local governments to increase their research activities. For example, the Chinese partners of the University of Liverpool recently requested that their campus in China becomes more research focused because the University of Liverpool is a research-led university in the UK (Altbach, 2010).

It is clear that the demand for places at the public/federal institutions significantly outstrips supply. Edwards (2008) observes the negative social impacts that can result when supply of HE places lags behind demand. For example, his study revealed that young people from lower socio-economic groups became increasingly disadvantaged. If UAE nationals from poorer backgrounds, or those living in rural areas, are unable to participate in higher education, then it is also possible that they will be less likely to participate in the labour market. Eventually, the situation could result in social unrest. Given that the UAE still relies heavily on expatriate labour, it has been a key government objective for many years to increase the participation of nationals in the labour market.

The UAE achieves very high rates of participation in higher education. Some 95 per cent of all females and 80 per cent of all males who complete the final year of secondary school apply for admission to higher education (National Media Council, 2009). In 2008-9, the UAE University admitted 3355 new students; the Higher Colleges of Technology, 7902 students; and Zayed University 1558 students (National Media Council, 2009). Of the national students who graduated in 2006, 66.8 per cent were female (Hijazi *et al.*, 2008). Many males prefer to join the armed forces or to take up employment in family businesses or relatively well-paid administrative positions in the public sector. Even though there is a shortage of places in the public HEIs, each year many male school leavers who are offered places in them don't turn up for enrolment at the start of the academic year.

The level of federal funding per student in a public HEI has now fallen below international standards (Fox, 2008). It is clear that the public HEIs need increases in funding from the federal government so that they can increase the number of places on their undergraduate programmes. Further funding is also needed in order to develop and expand postgraduate provision, including doctoral programmes, and to support the development of more research activity. The individual emirates have introduced various incentives, such as the establishment of free trade and education zones, to attract foreign institutions to set up in the UAE. Given that at least fifty-seven private institutions are now operating in the country, it would seem that the local governments have been successful in adopting this strategy as a means to increase the supply of places in higher education. In 2001, the percentage of degrees awarded that came from private institutions was 26.9 per cent (Hijazi *et al.*, 2008); in 2006, this figure had increased to 54.6 per cent.

Most of the new private institutions have set up in Dubai and Abu Dhabi, the two emirates with the largest populations. Ras al Khaimah and Sharjah are two other emirates that have enjoyed some success in attracting foreign institutions. The private education system is open to the entire UAE population, but both UAE nationals and expatriates are expected to pay full tuition fees, which are relatively high and unaffordable to many families. Only a limited number of scholarships have been made available for study at the private institutions, offered either by the government or the institutions themselves. Approximately one third of UAE national undergraduates are currently studying at a private institution rather than at one of the three federal institutions. For some students, it was a forced choice because they did not achieve the entrance requirements of the federal institutions. In this case, foreign private institutions typically require the student to take some sort of foundation or language programme

before enrolling onto an undergraduate degree. For example, of the 3,565 students enrolled at the University of Wollongong's Dubai campus at the end of 2009, 753 were studying in its Centre for Language and Culture on courses below undergraduate level.

UAE nationals may have a range of other motives for studying at a private institution, including the chance to study subjects not offered at the federal institutions, the possibility of gaining a more highly respected degree from overseas, which may enhance their career prospects in the international labour market, or simply that their chosen institution is in a more convenient location. An increasing number of mature employed nationals are choosing to study on a part-time basis. In 2001-2, approximately two-thirds of the UAE national students at Dubai Polytechnic (since renamed the University of Dubai) were studying on a part-time (evening) basis.

Current problems and issues

At least two-thirds of the private institutions that currently operate in the UAE were established after 2005. The speed at which foreign institutions came to the UAE has been referred to in the media as an 'education gold rush' (Lewin, 2008). Some foreign universities were undoubtedly tempted by the prospect of easy revenue generation in a wealthy country (Altbach, 2007; Naidoo, 2010), and some probably made the decision to set up in the UAE without doing sufficient market research. It is not easy to ascertain the exact motives of foreign universities for establishing campuses in the UAE. Knight (2006) suggests that universities, which are not in the for-profit sector, are typically motivated by the desire to enhance research and knowledge capacity, and to increase cultural understanding. Most of the branch campuses in the UAE offer a narrow range of courses, and many have decided to specialise in the same subjects, such as business/management and information technology, which are relatively cheap to establish and which can easily accommodate high student numbers.

It is known that some institutions have failed to achieve their recruitment targets. In May 2009, the George Mason University, an American institution based in Virginia, closed its campus in Ras al Khaimah, less than three years after it opened. It managed to enrol only 180 undergraduate students. At the end of 2008, the director general of the Knowledge and Human Development Authority (KHDA), the organisation responsible for licensing private HE institutions in the Emirate of Dubai, publicly acknowledged that the balance of supply and demand was 'working for the students' by keeping tuition fees lower. It is known that some of the foreign private universities already established in the UAE have called on the authorities to take a more active role in providing a regulatory environment that ensures the number of HE providers is 'right'.

In December 2009, the New York Times reported that international branch campuses in Dubai were struggling following the collapse of the emirate's overheated economy (Lewin, 2009). Michigan State University, which started classes in August 2008, had only 85 undergraduates at the end of 2009, and Rochester Institute of Technology, which also started operations in August 2008, had only 50 students. Murdoch University, based in Perth, Western Australia, which started operations in Dubai in the summer of 2008, admitted that the number of students it had in its second year was almost 30 per cent below its target. It will take some institutions considerably longer to achieve break-even than they had budgeted, and some may never reach that point. Michigan State University has already put back its target of break-even within three years to five years.

Institutions are finding it difficult to differentiate themselves in a crowded marketplace, and having to compete on price is not something that many of them would previously have thought they would end up doing. Michigan State University had hoped to lure 100 students from other universities in the second half of 2009 by offering half-price tuition fees. Even this strategy was unsuccessful, as by mid January 2010, only twenty students had been accepted (Bardsley, 2010b). Although around 200 applications had been received for the 100 half-price places, only ten per cent of the applicants met the university's standard entry criteria. The university claimed that in rejecting 180 applicants it had proved that it would not compromise on academic quality standards. A possible problem for HE institutions in the UAE is that the highest quality students choose to study at the top universities in countries such as the US, Australia or UK.

Sutton and Tse (1997) argue that educational managers must give urgent attention to quality during times of rapid expansion because all too often quantity is achieved at the expense of quality. Several of the earliest cohorts at Dubai Polytechnic suffered at least 50 per cent dropout and failure rates (Wilkins, 2002). Students who were used to didactic, teacher-centred secondary education found it difficult to adjust to the student-centred and independent learning that was expected by the British system of higher education. A high proportion of students were also found to have unsatisfactory written English skills.

Some institutions are doing better than others

Not all HE institutions in the UAE are struggling. Heriot-Watt University, based in Edinburgh, Scotland, enrolled 800 new students at its Dubai campus in 2009, taking its total to over 1,500. The university claims to offer high quality education at competitive prices. The university's management are very pleased with its progress to date and the next phase of its development will involve building a new larger campus at Dubai International Academic City (DIAC). It will also be extending its academic provision to include a range of doctoral programmes and courses that are relevant to the UAE, and which are within its area of expertise, such as petroleum engineering.

The University of Wollongong is currently the largest foreign owned branch campus in the UAE that operates under the same name as its home campus. Having been in Dubai since 1993, the University of Wollongong has clearly benefited from first-mover advantage, and it had 2,812 students enrolled on undergraduate or postgraduate programmes at the end of 2009. It has an equal balance of undergraduate and postgraduate students, and the vast majority of students are recruited from the local expatriate communities, with Indians accounting for approximately a quarter of all enrolments, followed by Iranians (15 per cent). Some 13.4 per cent of the students are UAE nationals.

Prestigious universities such as Paris-Sorbonne University Abu Dhabi and New York University Abu Dhabi are believed to be achieving their student recruitment targets. As institutions such as these develop and expand, it seems clear that lower ranked universities will be forced to compete on price or by offering subjects not available elsewhere. It is also clear that while demand for places in the three federal institutions outstrips supply, at the start of 2010, supply in the private HE sector significantly exceeds demand. It is likely that a Darwinian type process will occur in the UAE HE marketplace over the next 5-10 years, whereby the top universities will prosper and grow and the weakest will contract or withdraw from the UAE.

Quality of higher education in the UAE

It is possible that the large number of HE providers in the UAE has a positive effect on quality, as institutions are forced to compete by improving their programmes and the employability of their graduates. However, market forces alone cannot be relied upon to guarantee the quality of HE programmes delivered in the UAE. An examination of online forums such as www.dubaifaqs.com/universities and www.desertspeak.com reveals that many students are concerned about the quality of higher education in the UAE. Students have expressed concerns about the quality of faculty employed in universities, the high labour turnover that exists in some institutions, the quality of learning resources and equipment, and the non-delivery of advertised optional modules.

The Ministry of Higher Education and Scientific Research (MHESR), through its various departments, is responsible for HE planning, policy development and implementation, quality management, data acquisition and analysis, the provision of admissions services for the federal institutions and the awarding of scholarships to UAE nationals. The three federal institutions are subject to the quality assurance process of the Higher Education Council. In addition, all three federal institutions have sought to achieve international accreditation, mainly from US regional accrediting bodies.

Private HEIs in the UAE are required to be licensed by the Commission for Academic Accreditation (CAA), and then to have each of their academic programmes individually accredited. The CAA's standards are based on a US model, but they have been modified for the UAE. They cover all of the main activities of an educational institution. Foreign institutions can escape the requirements of the CAA by locating in certain free zones spread across the country. However, they would still be required to satisfy the requirements of individual emirates; for example, in Dubai, institutions must satisfy the licensing criteria of the KHDA. Foreign private education providers, whether located in free zones or not, are expected to adhere to the standards of their parent organisations and the policies and regulations applicable in their home countries. Given that many of the foreign universities in the UAE are probably there predominantly to make a profit, expecting self-regulation may not be a dependable method of guaranteeing minimum standards of quality. UAE nationals are less likely to be attracted to programmes that have not been accredited by the CAA, as such programmes are not recognised by government departments. In practical terms, this means that UAE nationals holding unaccredited degrees are not be able to gain employment in the public sector (Wilkins, 2002), and this is where most nationals prefer to work due to higher salary levels and superior working conditions to those available in the private sector.

Individual emirates have also established their own organisations that are responsible for creating and enforcing policies and regulations relating to quality in foreign HE institutions. In 2009, the Emirate of Dubai established the University Quality Assurance International Board (UQAIB). In January 2010, UQAIB was halfway through assessing the 24 free zone institutions. UQAIB let it be known through a press release that it had the power to revoke the licence of any international branch campus that did not satisfy its requirements (Bardsley, 2010a). The head of UQAIB hinted that licences of substandard institutions could be revoked at the end of 2010. Interestingly, the UQAIB is not only assessing institutions, it is also conducting a review of whether the international branch campus model is working.

Brand reputation and human resource issues

In 2008, the University of Pennsylvania and Yale University announced that they would not be opening international branch campuses in the foreseeable future. Of concern to both institutions was control over their brand name reputation and quality assurance issues, particularly their ability to recruit the quality of faculty that would guarantee academic standards (Olds, 2008). Research active senior faculty are usually reluctant to leave their work at home campuses and junior faculty fear that working overseas will limit their chances for promotion. International branch campuses often recruit faculty who lack an affiliation with the home campus (Altbach, 2010), and sometimes they even hire faculty who have no experience of teaching or education in the home country. Some of the smaller branch campuses employ relatively high proportions of part-time faculty, which may represent an effective method of minimising costs, but it is not a method of achieving employee commitment and high quality teaching and research. In conclusion, whilst establishing international branch campuses in the UAE, or in any of the other new education hubs, may appeal to institutions wanting to raise cash and their international profile, it would seem that some of the world's most prestigious universities do not yet believe that the rewards outweigh the risks and potential costs.

The shortage of student applications is clearly forcing some private HEIs to be 'flexible' with regard to their entry requirements. Students are studying in international branch campuses in the UAE who probably would not have been accepted onto the same programme at the institution's main home campus (Altbach, 2010). Once enrolled, there exists considerable pressure on faculty to satisfy the students, as they are now considered to be more like consumers than simple receivers of education. This is no different to the situation that exists in many countries around the world, which is considered by many to be the result of the commercialisation of higher education. A survey conducted in the UAE revealed that, on average, professors found their students had average or below average ability in mathematics and writing in English. They also admitted that students were being awarded higher grades than they deserved (Gerson, 2010). It is common for students in the UAE to plead for higher grades, often acting under parental or peer pressure. Poor course evaluations, complaining students and concerns over job security were identified by professors in the survey as some of the causes of grade inflation. It is not uncommon for faculty at HEIs in the UAE to have their contracts terminated due to poor course evaluations. The UAE University uses student evaluations of teaching as a factor in determining promotions, merit awards, long-term contracts and contract renewals (Badri *et al.*, 2006). Pounder (2007) suggests that educational institutions should develop and experiment with new approaches to assessing teaching quality and classroom dynamics.

The current balance of supply and demand in the UAE private HE sector has brought both advantages and disadvantages for students. Disadvantages and potential risks include the availability of a narrow range of subjects and options, modules that are not delivered due to insufficient numbers of students selecting them, under investment in resources and equipment, a narrow range of extra-curricular activities and the risk of institutions closing and abandoning their enrolled students before they have completed their programmes. Potential advantages to students of the current market situation include gaining access to higher education, which may otherwise have been inaccessible, the ability to gain a degree from a prestigious western university without having to travel to the country where it is based, smaller class sizes and the inability of institutions to increase tuition fees.

Discussion and conclusions

The higher education hub concept, as recently established in several countries in the Middle and Far East, is still an unproven model. Whilst the University of Wollongong has successfully existed in the UAE for many years, it has yet to be seen how it will cope in the increasingly competitive marketplace that is resulting from the government's objective of establishing the UAE as a regional higher education hub. Nevertheless, international branch campuses have already made higher education available to thousands of students who may otherwise not have had access to it. It is probable that some institutions will prosper and grow while others fail. Foreign universities cannot continue opening branch campuses that only offer similar business/management and information technology programmes; there is already over-supply of these in several locations, and as a result many institutions are operating under capacity. It has yet to be seen how foreign universities react when their international branch campuses fail to achieve enrolment and profit targets in the future. Some will probably give up the fight and close down, as George Mason University did in the emirate of Ras al Khaimah and as the University of New South Wales did in Singapore. Yet at the same time that George Mason announced its decision to withdraw from Ras al Khaimah two other institutions were in the process of moving in: the Ecole Polytechnique Fédérale de Lausanne (EPFL), based in Switzerland, and the prestigious University of Pune from India. Whilst the first programmes to be introduced by the University of Pune included Business Administration and Information Technology, EPFL specialises in the sciences and plans to offer programmes in subjects such as engineering and energy supply.

The new higher education hubs of the Middle and Far East and the international branch campuses located in them are in the early stages of their evolution. The most prestigious international institutions, such as New York University and Paris-Sorbonne, both in Abu Dhabi, will probably survive, at least in the medium term, by using their strong brands to attract students and also by relying, if necessary, on guaranteed funding from the Abu Dhabi government. In the longer term, even these institutions face considerable challenges. Witte (2010) notes that New York University Abu Dhabi intends to enforce strict entrance requirements, and that Americans are expected to make up around 40-50 per cent of the student body and UAE nationals only a very small proportion. The absence of a foundation year programme will do nothing to help enrol more UAE nationals in the future. Whether the Abu Dhabi government will be satisfied funding the university in the longer term if more UAE nationals are not admitted is not known. Generous financial aid packages are currently offered to students enrolling at New York University Abu Dhabi, but if these were reduced or withdrawn then the very high tuition fees could prevent a lot of students from applying.

There are a number of other political issues that represent risks to the international branch campuses. The process of labour nationalisation, known as emiratization, is already strong in several UAE industries, such as banking and finance, where legislation forces companies to employ certain quotas of nationals. The staff and faculty of the international branch campuses are currently almost wholly expatriates, but there will soon be a desire to see more UAE nationals employed both as managers and faculty. The recent introduction of doctoral programs in several UAE universities will aid the process of emiratization in higher education. Whether or not foreign programmes are modified for the UAE is another contentious issue. Some people believe that foreign institutions should deliver in the UAE exactly what they deliver in their home campuses; others believe that it is pointless doing this and ignoring local culture,

contexts and issues. It has been argued that high quality research, especially in the humanities and social sciences, is less likely to be produced in highly conservative and authoritarian settings (Romani, 2009). Even now, some scholars feel that research in the UAE on social, religious, cultural and ethical issues is severely restricted. This could hinder the progress of institutions seeking to be recognised internationally for their research output.

Given that many HEIs in the UAE are operating under capacity at the present time, and given that there is currently little more demand in the UAE itself, institutions should aim to attract more students from overseas. This strategy will need the cooperation of the UAE government, in issuing student visas quickly, efficiently and at reasonable cost. Furthermore, a future outbreak of war or military conflict in the Middle East could deter international students from studying in the region. Institutions need to develop contingency plans to deal with such situations. They should also introduce a wider range of programmes after conducting thorough market research, to identify the subjects that students want and that the local and regional economies need. Institutions should also invest more in their physical and human resources. Students will increasingly expect to have learning, social and cultural experiences that are closer to that which they would receive at home campuses. Institutions must act more like businesses if they are to survive in the competitive and overcrowded HE marketplace; they must develop, protect and effectively market their brands (Hemsley-Brown & Goonawardana, 2007), they must develop and implement strategies that give them a competitive advantage (Mazzarol & Soutar, 1999), they must achieve quality in all areas of their operations, and lastly, but perhaps most importantly, they must satisfy their customers by providing them with the knowledge, skills and experiences that will enable them to achieve their personal goals and to be productive in the local and international labour markets.

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