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Understanding the GCC Education Sector – a country by country guide

Country Profile: UAE

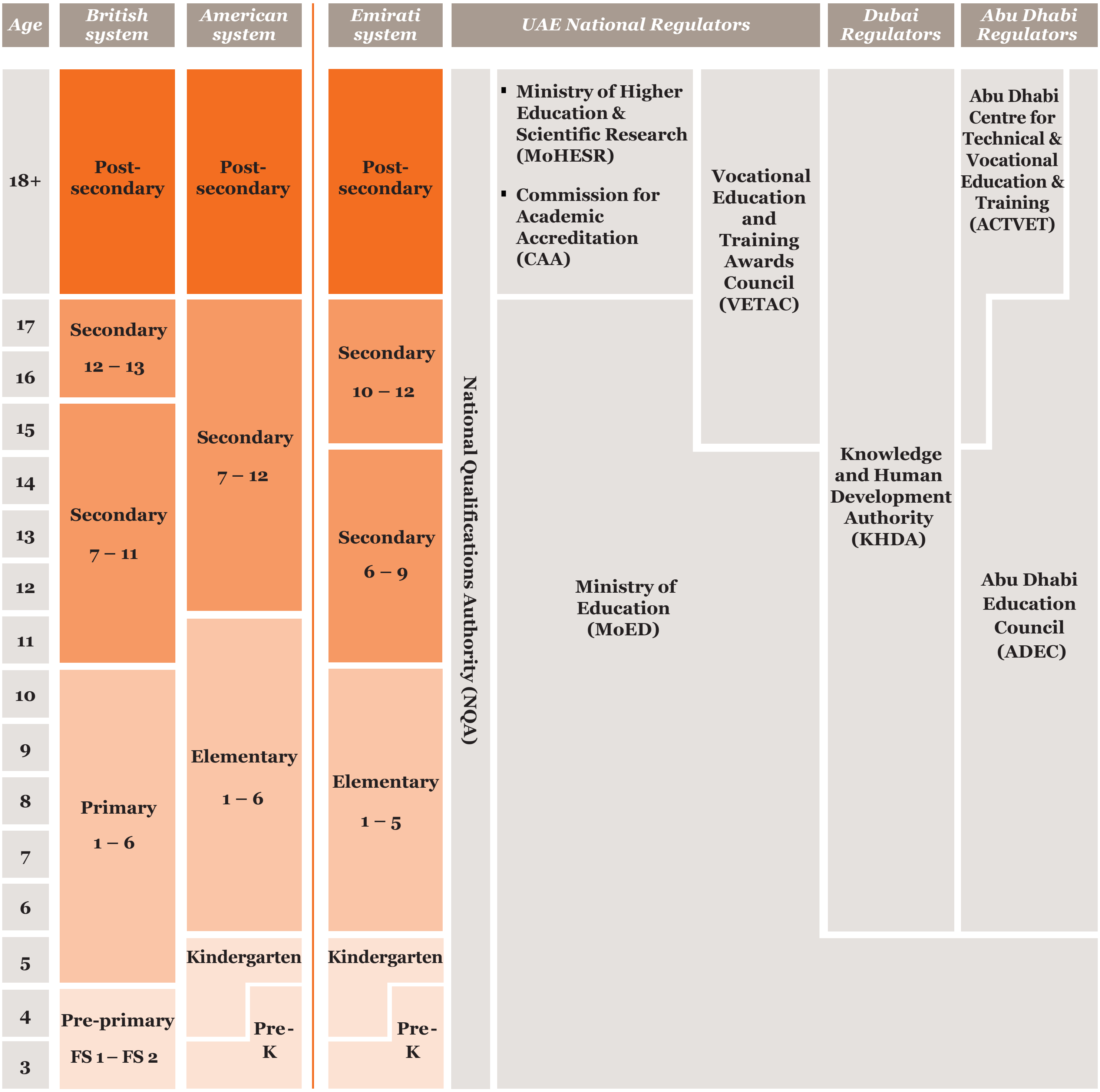
This series of infographics provides a country by country overview of the education sector in the GCC.

The UAE is one of the more mature markets in the region and remains a draw for investors, providers and students. Its scale and ambition remain undimmed, but what is the reality on the ground and what do the trends over time tell us about the education sector by segment? Finally what are the key differences between its two main markets – Dubai and Abu Dhabi?

September 2016

Overview of the education sector

Figure 1: Structure of the UAE's education system[1]



[1]UNESCO; PwC analysis

Figure 2: A growing youth population, especially in the K-12 age group[2]

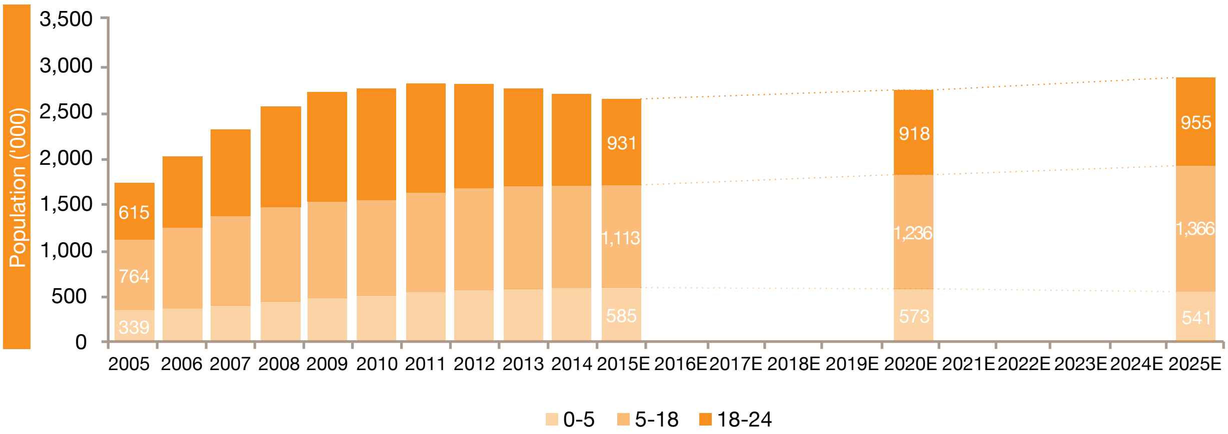


Figure 3: Rising income levels[3]

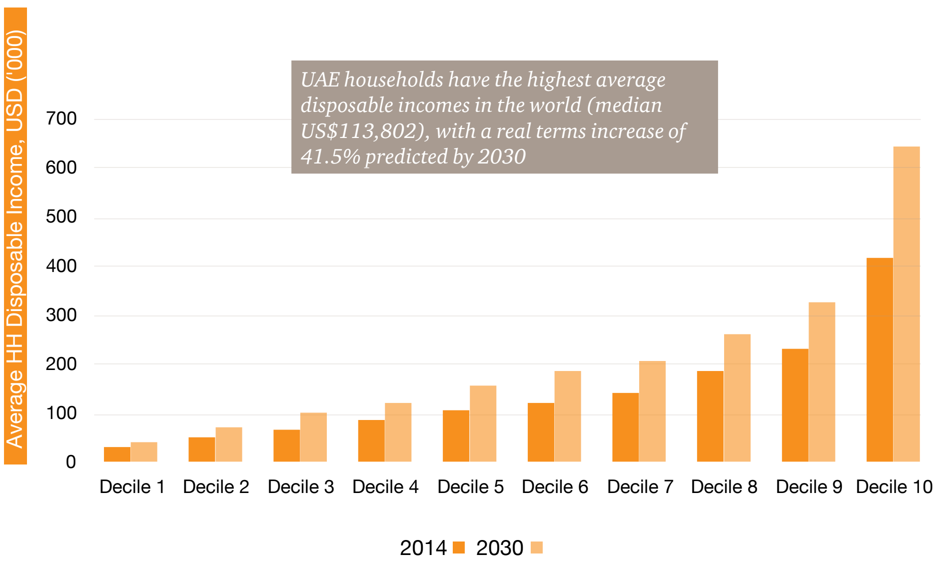


Figure 4: The number of schools in the UAE with many of the parents demanding high academic standards is similar to the levels seen in the US[4]

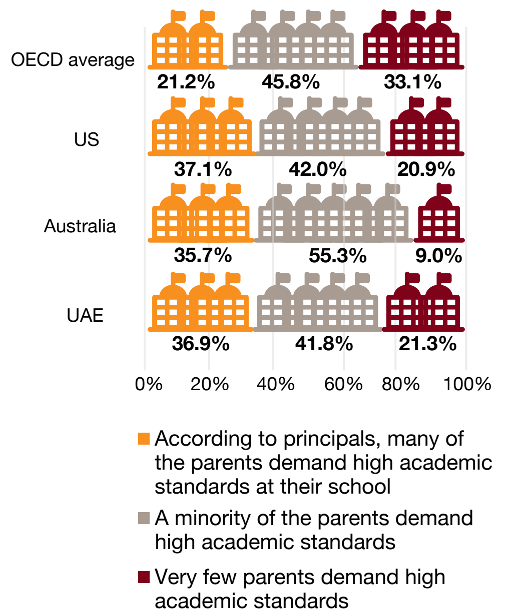
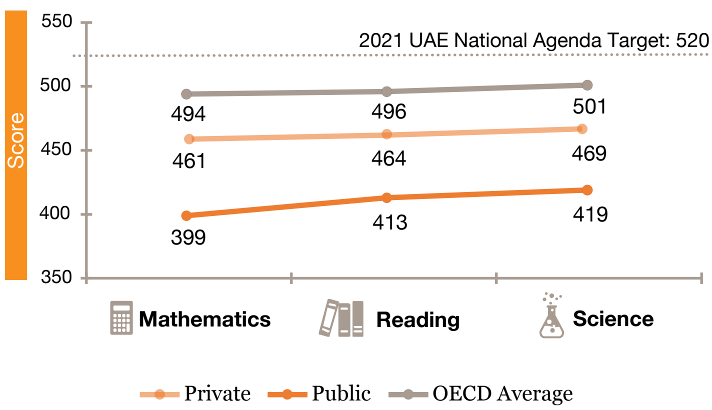


Figure 5: The quality of education in the UAE remains high, despite the negative impact of including gross tertiary education enrolment in the Global Competitiveness Index. This rate reflects the unique demographic make-up of the UAE and its outbound student mobility rate, which is one of the highest in the world

Global Competitiveness Index rankings comparison, 2015-16 vs. 2014-15[5]

	2015-16	*2014-15*
Overall	17th	12th
Quality of primary education	13th	13th
Quality of higher education	12th	9th
Primary education enrolment, net %	94th	98th
Secondary education enrolment, gross %	67th	64th
Tertiary education enrolment, gross %	99th	not included

Figure 6: The UAE's demanding aspirational goals – PISA 2012[6]



[2]UN ; PwC analysis
[3]Euromonitor; PwC analysis
[4]OECD (PISA 2012 principal survey); PwC analysis
[5]WEF (2015-16 (rank/140 countries) and 2014-15 (rank/144); PwC analysis
[6]OECD; PwC analysis

Higher Education

Figure 7: Despite a declining tertiary-aged population group, the UAE's tertiary enrolment rate has continued to rise to which 42,000 additional seats will be required by 2020. The country has been a popular destination for students from abroad to come and study, being drawn to its international higher education institutions

18-24 population & higher education enrolment by year and school type[7]

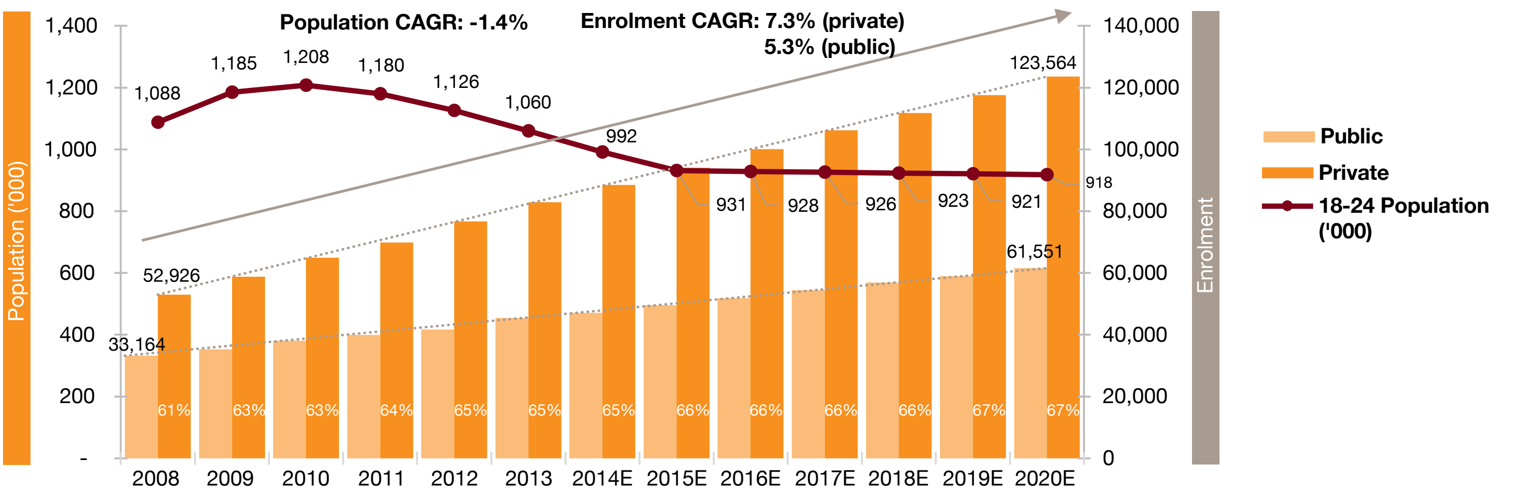


Figure 8: Enrolment and number of institutions by Emirate and school type, 2013-2014[8]

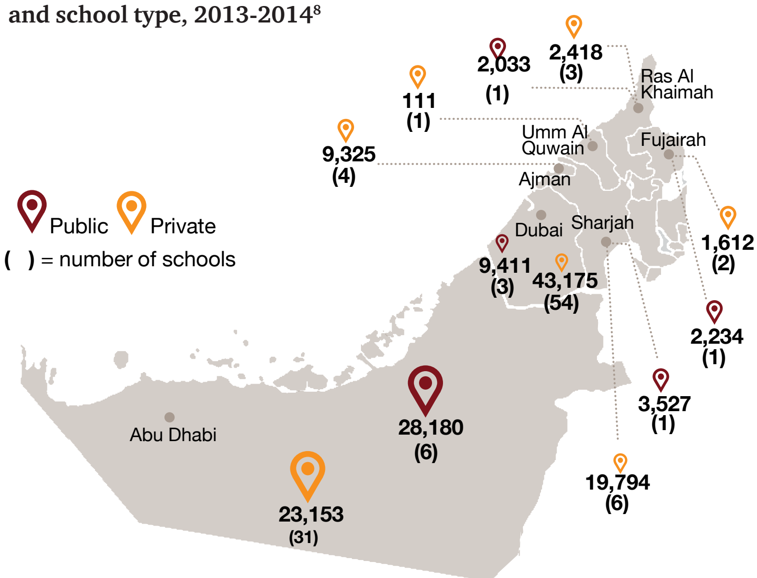


Figure 9: In Dubai, higher education enrolment has been growing faster than in Abu Dhabi since 2010 and offers more universities, including international branch campuses, than any other Emirate[9]

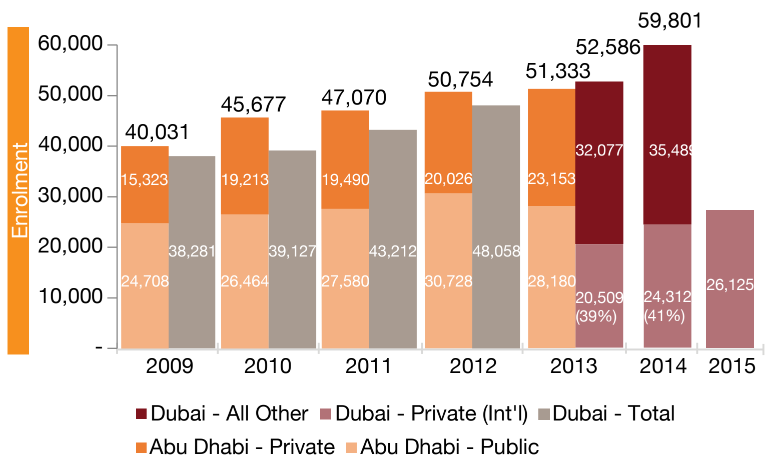
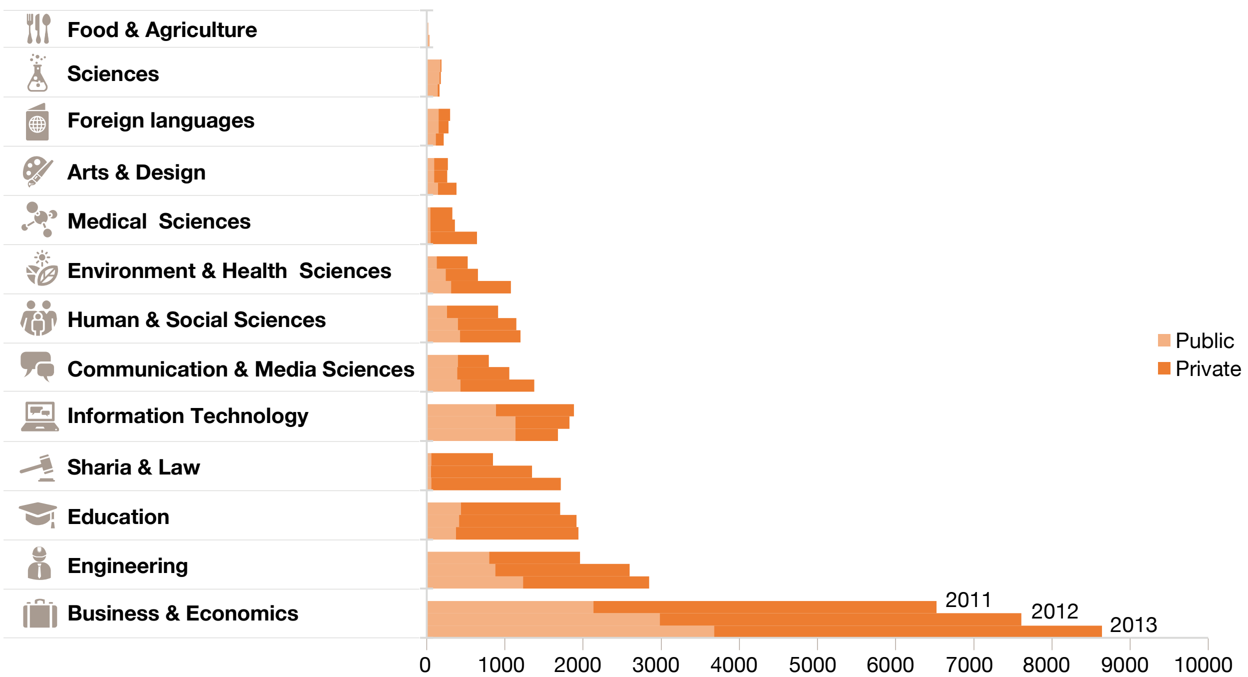


Figure 10: Despite a strategic commitment from the government to promote STEM subjects and encourage more programme diversity, the field of Business and Economics remains popular for university graduates[10]



[7] MoHESR; UN; PwC analysis (2016-20 seat estimate;18-24 population calculations only)
[8] MoHESR; KHDA; PwC analysis
[9] ADEC; SCAD; KHDA; PwC analysis
[10] MoHESR; PwC analysis

Figure 11: Abu Dhabi graduates from private institutions, 2012-13[11]

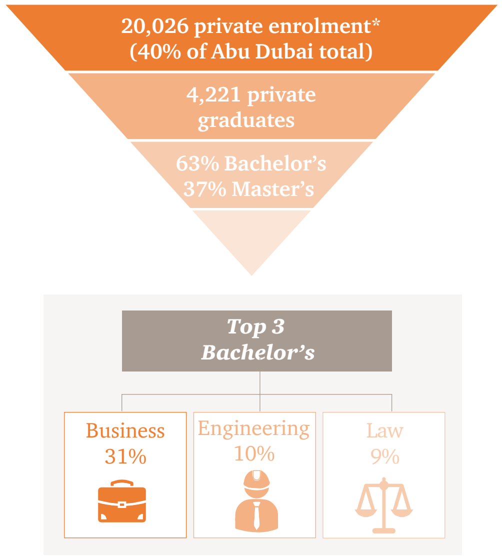
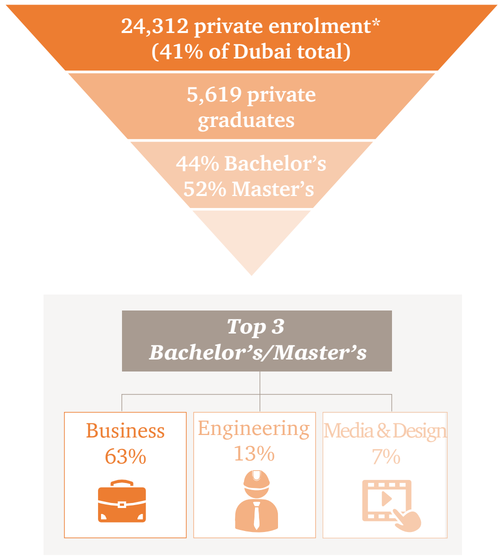


Figure 12: Dubai graduates from private international institutions, 2014-15[12]



K-12 Education

Figure 13: Over 175,000 additional seats are predicted to be required by 2020 in the UAE of which 90% are expected to be in the private sector

5-18 population & K-12 enrolment and number of schools by school type in the UAE[13]

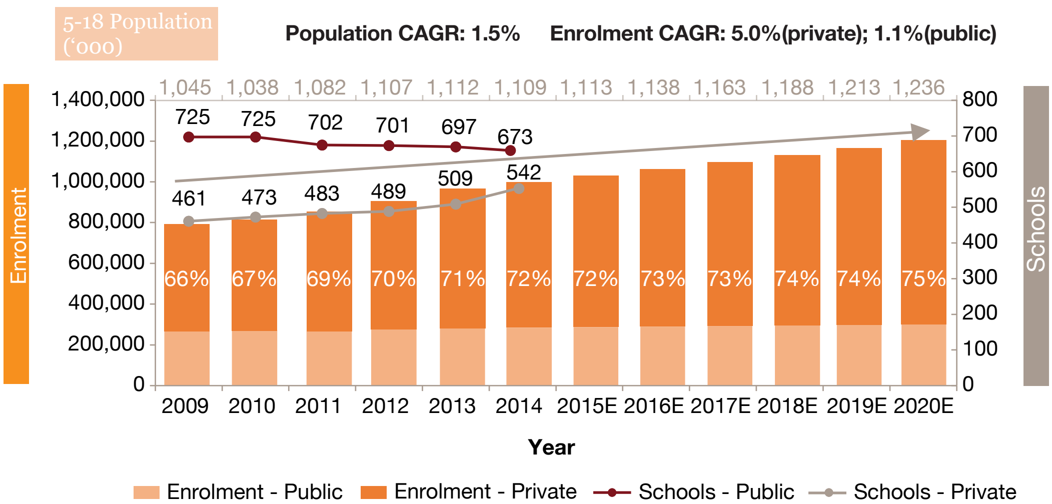
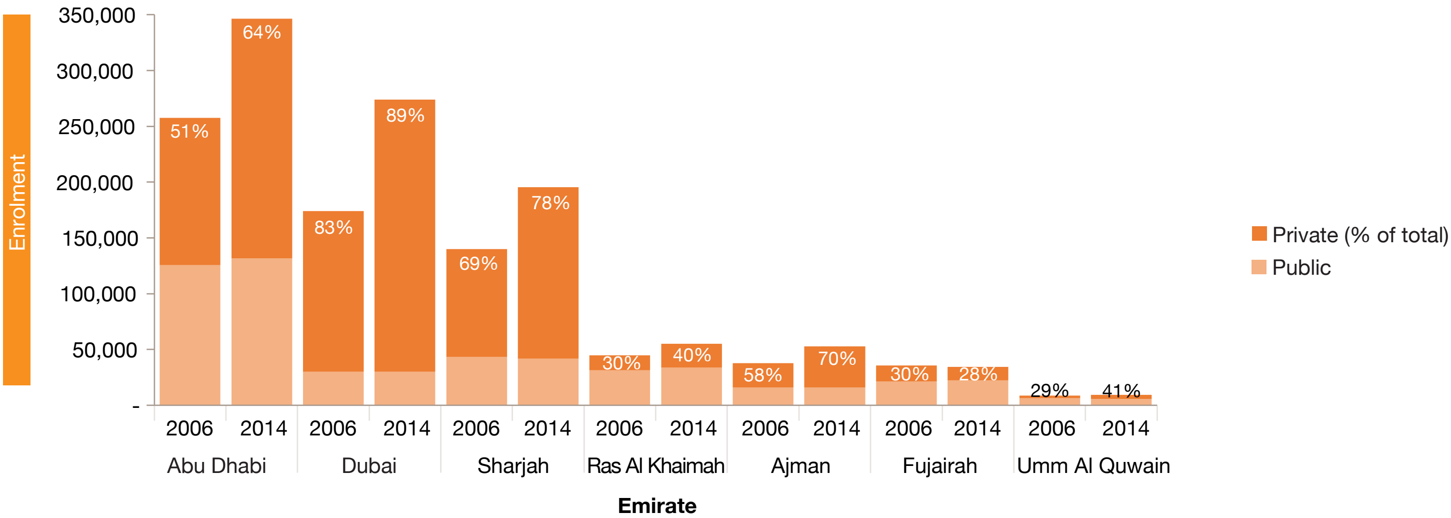


Figure 14: K-12 enrolment growth is coming from the private sector in every Emirate except Fujairah with Dubai leading the way[14]



[11] SCAD; MoHESR; PwC analysis
[12] KHDA; PwC analysis
[13] MoE; UN; PwC analysis (2016-20 seat estimate)
[14] MoE; PwC analysis

Figure 15: Abu Dhabi is predicted to require over 62,000 additional seats in 52 new private schools by 2020 In Dubai 74,500 additional seats are predicted to be required in 50 new private schools

Abu Dhabi and Dubai K-12 private student enrolment and number of private schools[15]

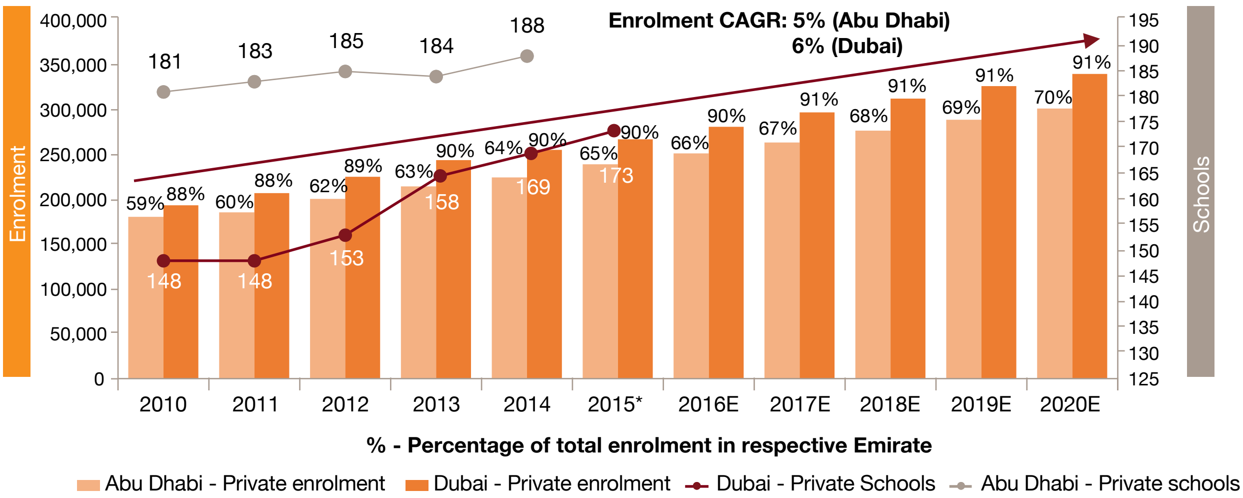


Figure 16: Dubai is seeing a need for more quality schools below AED 40,000

Focus on Dubai

Spread of Dubai K-12 private schools, 2015[16]

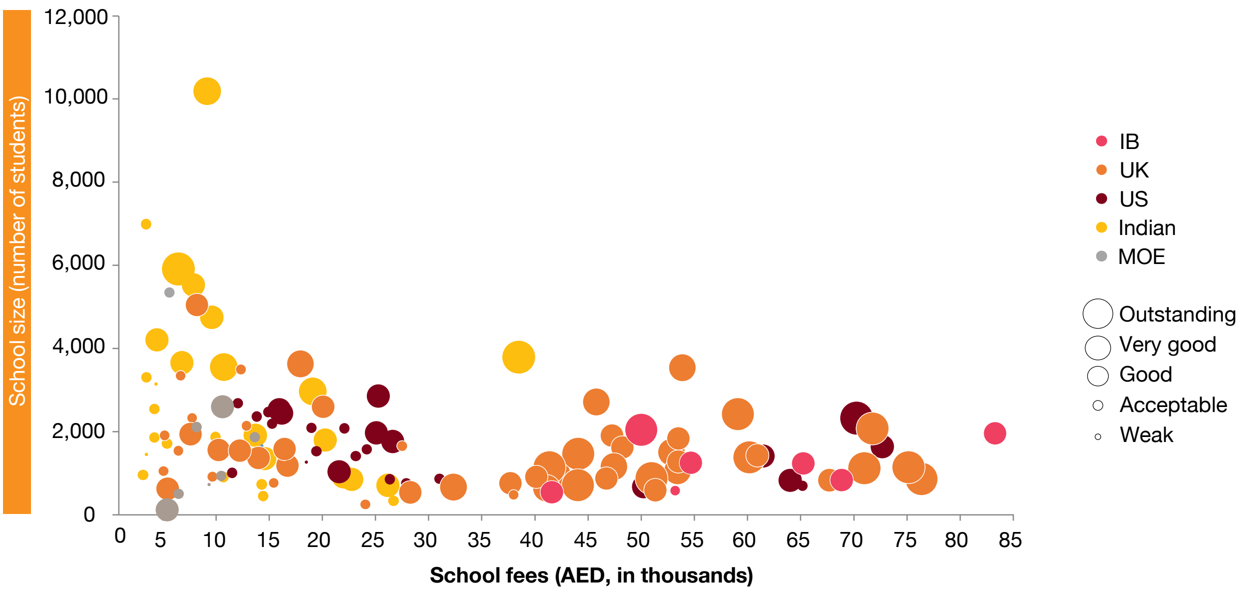
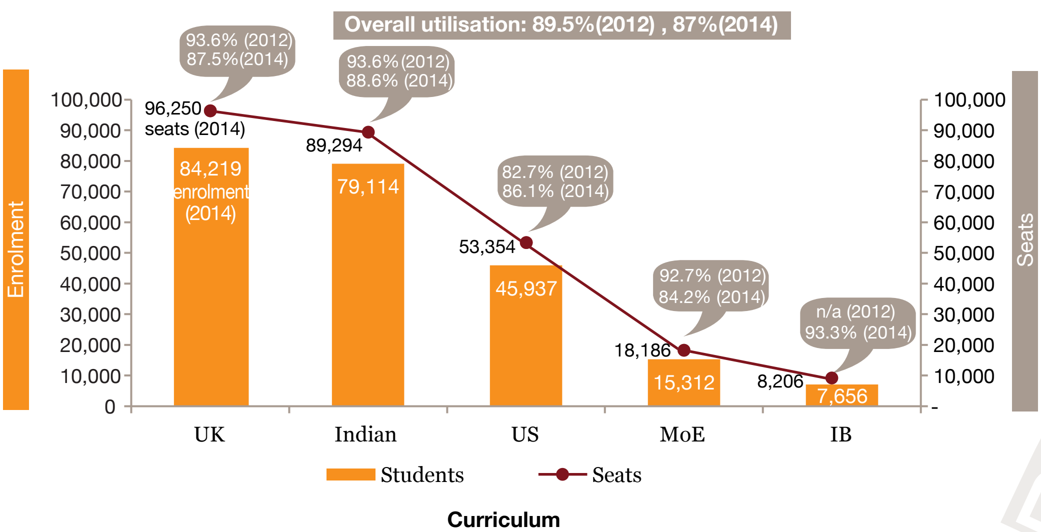
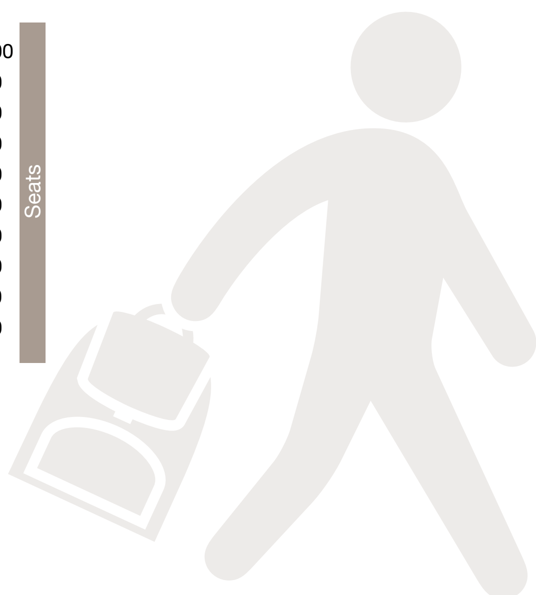


Figure 17: Dubai's K-12 private school utilisation rates across its diverse curricula market (2012, 2014)[17]





[15]SCAD; KHDA; PwC analysis (2016-20 seat estimate; based on current average school size per Emirate; *estimate only for Abu Dhabi)
[16]KHDA; PwC analysis (2014 school size)
[17]KHDA; PwC analysis

Figure 18: In Dubai UK and Indian curriculum schools continue to dominate but IB curriculum schools are becoming an increasingly popular option among parents

Dubai K-12 private school enrolment by curriculum[18]

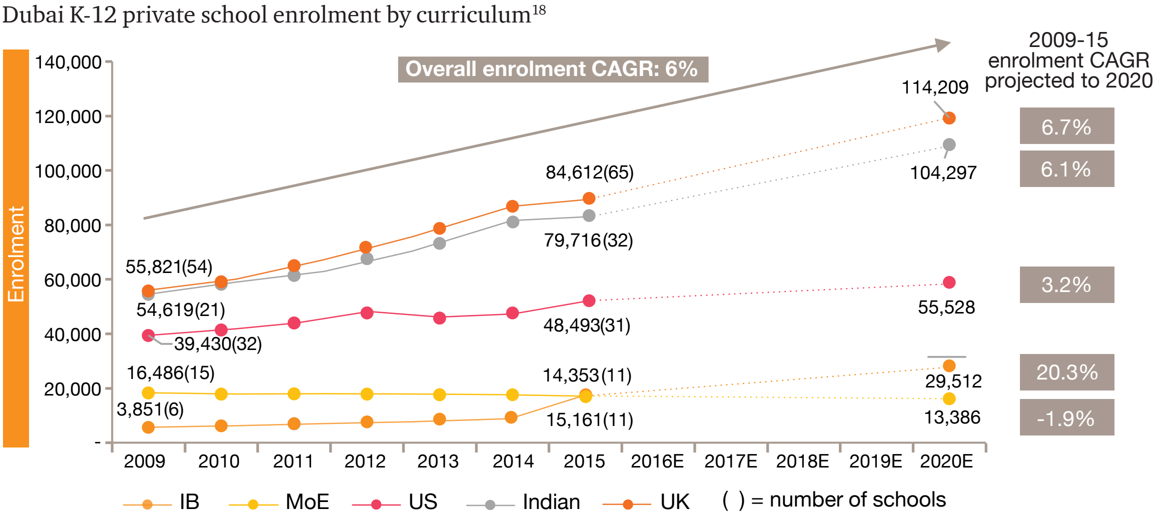


Figure 19: An increasing number of schools 'Good' and above in Dubai as rated by KHDA

Dubai K-12 private school performance[19]

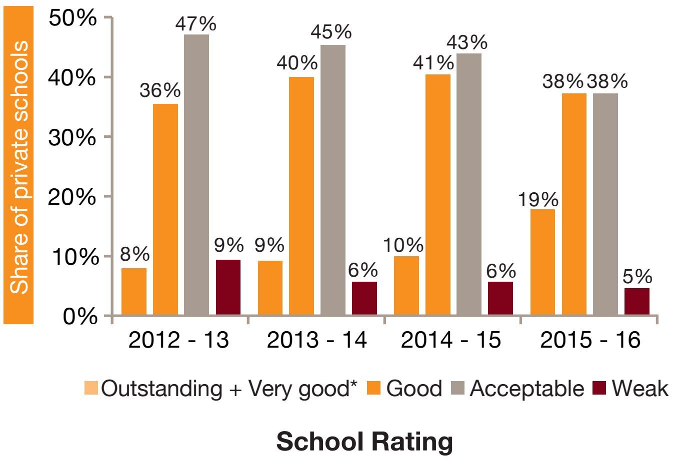
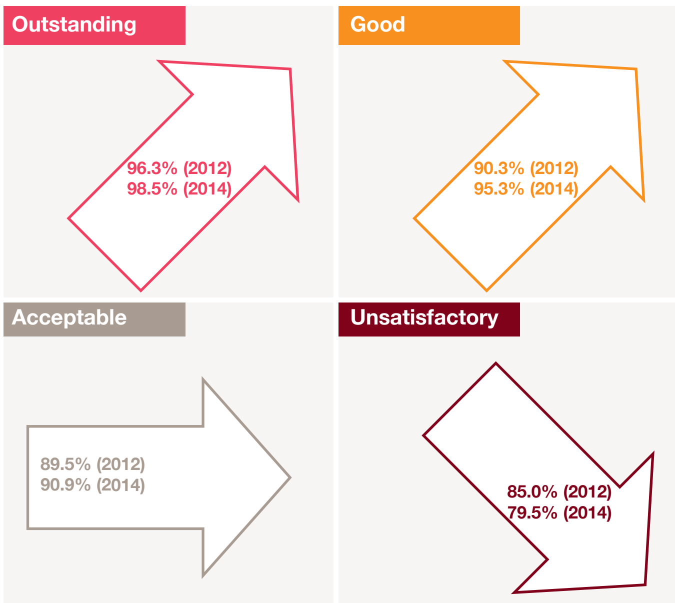


Figure 20: Parents are increasingly able to choose 'Outstanding' and 'Good' rated schools as supply increases, meaning improvement is required in lower-rated schools to attract students

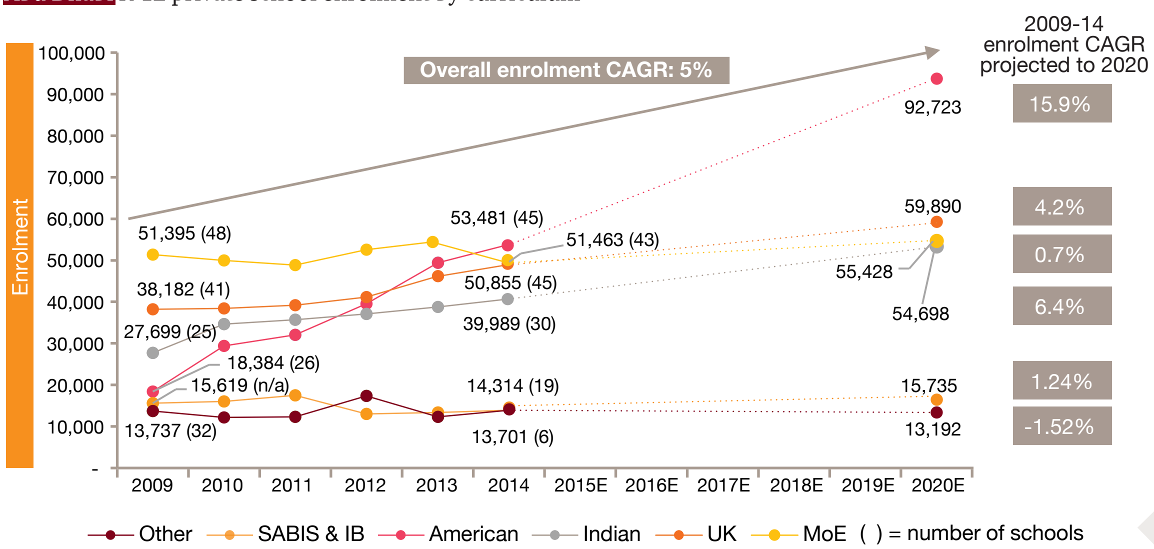
Dubai K-12 private school utilisation rate by school rating (2012 & 2014)[20]



Focus on Abu Dhabi

Figure 21: Indian and American curriculum schools are driving growth but British curriculum schools remain popular choices with parents considering admission to lower cost European higher education options

Abu Dhabi K-12 private school enrolment by curriculum[21]



[18] *KHDA; PwC analysis*
[19] *KHDA (*beginning 2015-16, 'Very Good' and 'Very Weak' were added to KHDA's ratings framework); PwC analysis*
[20] *KHDA; PwC analysis*
[21] *ADEC; SCAD; PwC analysis*

Figure 22: Quality improvement still required despite progress in Abu Dhabi

Abu Dhabi K-12 private school performance[22]

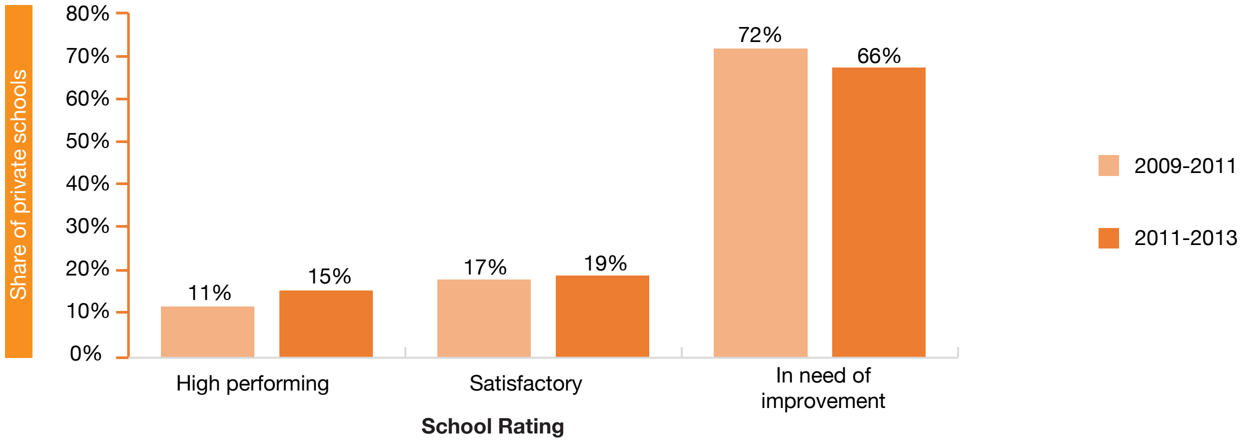
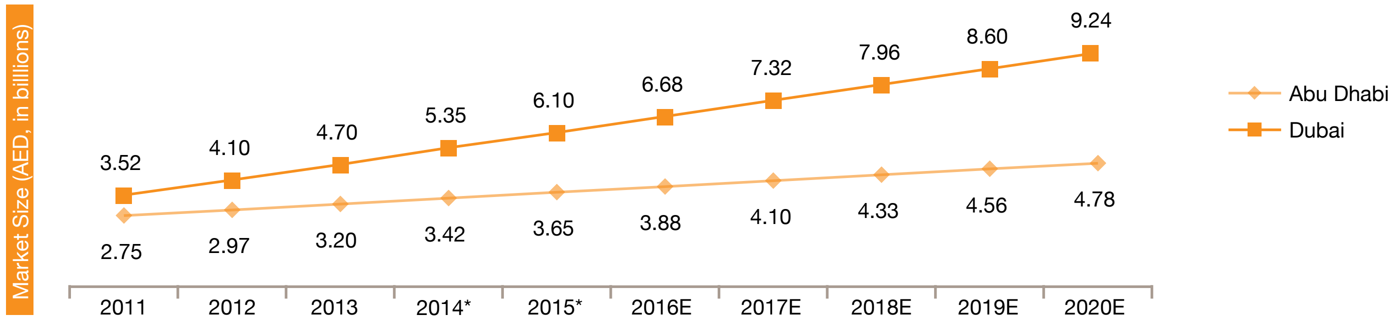


Figure 23: Abu Dhabi and Dubai K-12 private school market size based on tuition fee (AED) and enrolment[23]



Pre-K Education

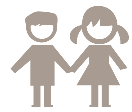


Figure 24: Formal pre-k education is increasing in popularity and is encouraged by the UAE government

Total enrolment and number of nurseries[24]

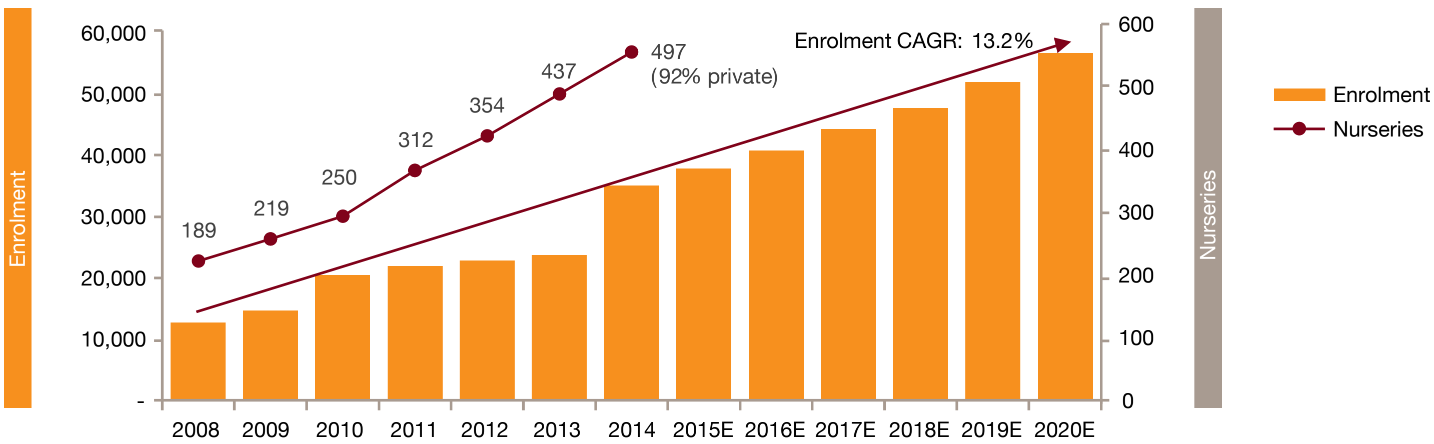
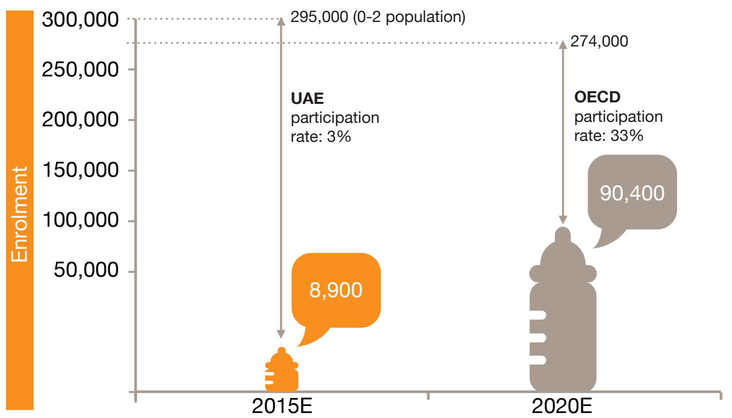


Figure 25: To achieve the OECD average participation rate of 33% for 0-2 year olds by 2020, over 81,500 additional seats will be required[25]



[22] ADEC; PwC analysis
[23] ADEC; KHDA; PwC analysis (*estimate only for Abu Dhabi)
[24] MSA; UN; PwC analysis
[25] MSA; UN; PwC analysis (2016-20 seat estimate; based on 34% of nursery enrolment are 0-2 year olds)

Key players

Figure 26: UAE key players in private education by size[26]

UAE:
Ministry of Education (MoED), Ministry of Higher Education & Scientific Research (MoHESR), Commission for Academic Accreditation (CAA), National Qualifications Authority (NQA), Vocational Education and Training Awards Council (VETAC)

	Pre-K	*K-12 (schools)*	*HigherEd (enrolment)*	*Local Regulators*
Abu Dhabi	• Bright Kids • Kidz Link • Kids First Group • GEMS Education	• GEMS Education (7) • Aldar Academies (7)	• Abu Dhabi University (4,500) • Al Ain University of Science and Technology (4,500)	• Abu Dhabi Education Council (ADEC) • Abu Dhabi Centre for Technical and Vocational Education and Training (ACTVET)
Dubai	• Innoventures • Kids First Group • GEMS Education • Taaleem	• GEMS Education (31) • Taaleem (7) • Innoventures (4)	• University of Wollongong (4,000) • Heriot-Watt University (3,500) • American University in Dubai (2,600) • Middlesex University (2,500) • American University in the Emirates (2,500)	• Knowledge and Human Development Authority (KHDA)
Rest of UAE		• GEMS Education (7)	• University of Sharjah (12,500) • Ajman University of Science and Technology (9,000) • American University of Sharjah (6,000)	• Sharjah Education Council • Ajman Educational Zone • Ras Al Khaimah Educational Zone • Fujairah Educational Zone • Umm Al Quwain Educational Zone

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[26] *PwC analysis*

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