



CONSULTING
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K-12 EDUCATION SECTOR IN QATAR

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K-12 EDUCATION SECTOR OVERVIEW FOR QATAR



INTRODUCTION

This education sector overview ("**Overview**") has been prepared by Consulting HAUS LLC ("**CH**") based on information obtained from secondary resources (including the Planning and Statistics Authority ("**PSA**"), various research publications, websites, etc.) and information gathered via primary market interviews with a cross-section of market participants in Qatar.

Based on an assessment of the various data sources, the Overview presents the state of Qatar's primary and secondary education industry along with the sector's prospects, trends, and market opportunities.

Users of the Overview are encouraged to undertake their independent research before making any business-related decisions based on the content of the Overview.

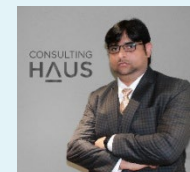
Should you require a more in-depth analysis of the education sector, please get in touch with a member of the team or send an inquiry via our website: www.consulting-haus.com

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K-12 Education sector in Qatar

HUMAN DEVELOPMENT REQUIREMENTS

Qatar National Vision 2030 (“**QNV2030**”) human development pillar stresses the importance of education towards the country's advancement

HUMAN DEVELOPMENT REQUIREMENTS



AN EDUCATED POPULATION

- World-class education system
- National network of formal and non-formal education programs
- Well-developed educational institutions
- Public-private funding for world-class scientific research
- International role in cultural and intellectual activity



A HEALTHY POPULATION

- Comprehensive world-class healthcare system
- Integrated healthcare system offering high-quality services
- Skilled national workforce capable of providing high-quality healthcare services
- Continued commitment by the state to provide sufficient funds



A CAPABLE AND MOTIVATED WORKFORCE

- Increased and diversified participation of Qatari nationals in the workforce
- Targeted participation of expatriate labour

Source: QNV2030 document





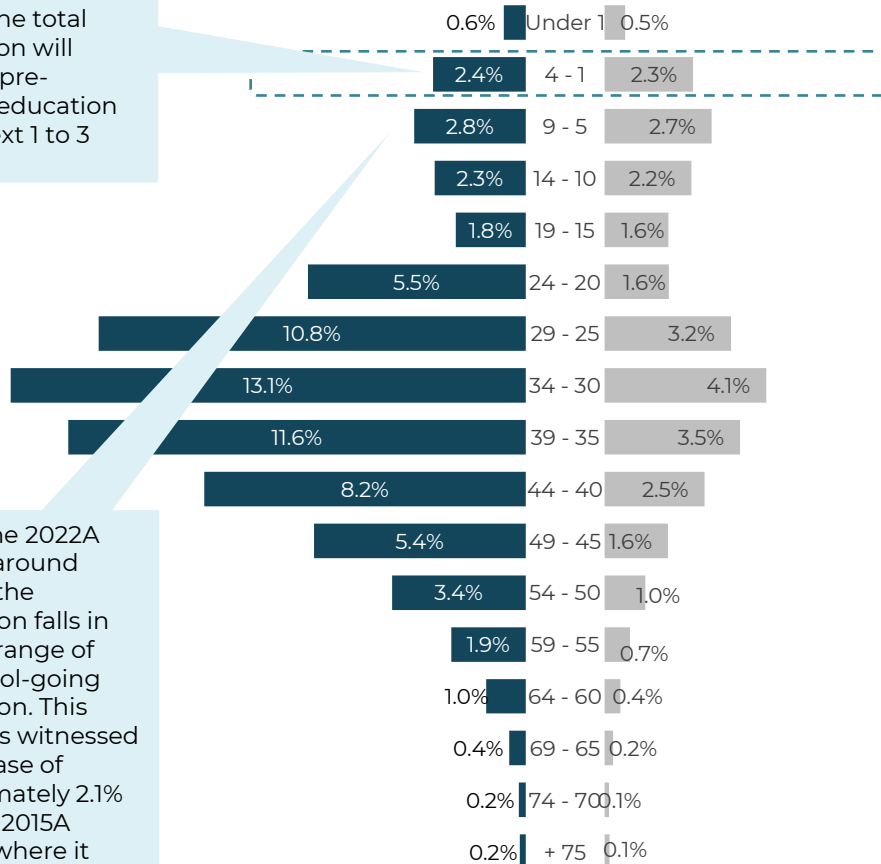
K-12 Education sector in Qatar

DEMOGRAPHIC OVERVIEW: POPULATION BY AGE GROUP

4.7% of the total population will enroll in pre-primary education in the next 1 to 3 years

QATAR POPULATION 2020A - BY AGE GROUP

4.7% of the total population will enroll in pre-primary education in the next 1 to 3 years



As per the 2022A census, around 19.2% of the population falls in the age range of the school-going population. This share has witnessed an increase of approximately 2.1% over the 2015A census, where it stood at 17.1%

AGE GROUP	MALE	FEMALE	TOTAL	CAGR (2015A-2020A)
+ 75	4,387	3,861	8,248	3.6%
74 - 70	4,987	3,389	8,376	7.6%
69 - 65	11,821	6,281	18,102	7.1%
64 - 60	28,580	11,762	40,342	6.8%
59 - 55	53,734	18,655	72,389	2.5%
54 - 50	96,671	29,712	126,383	4.9%
49 - 45	152,937	45,936	198,873	4.6%
44 - 40	232,389	72,413	304,802	5.9%
39 - 35	330,722	98,223	428,945	6.9%
34 - 30	372,192	117,140	489,332	4.0%
29 - 25	308,692	91,359	400,051	-1.2%
24 - 20	157,399	46,506	203,905	-4.2%
19 - 15	50,657	46,399	97,056	3.1%
14 - 10	65,829	62,919	128,748	7.7%
9 - 5	80,716	77,665	158,381	6.8%
4 - 1	67,020	64,229	131,249	4.8%
Under 1	15,785	15,151	30,936	7.5%
Total	2,034,518	811,600	2,846,118	3.4%

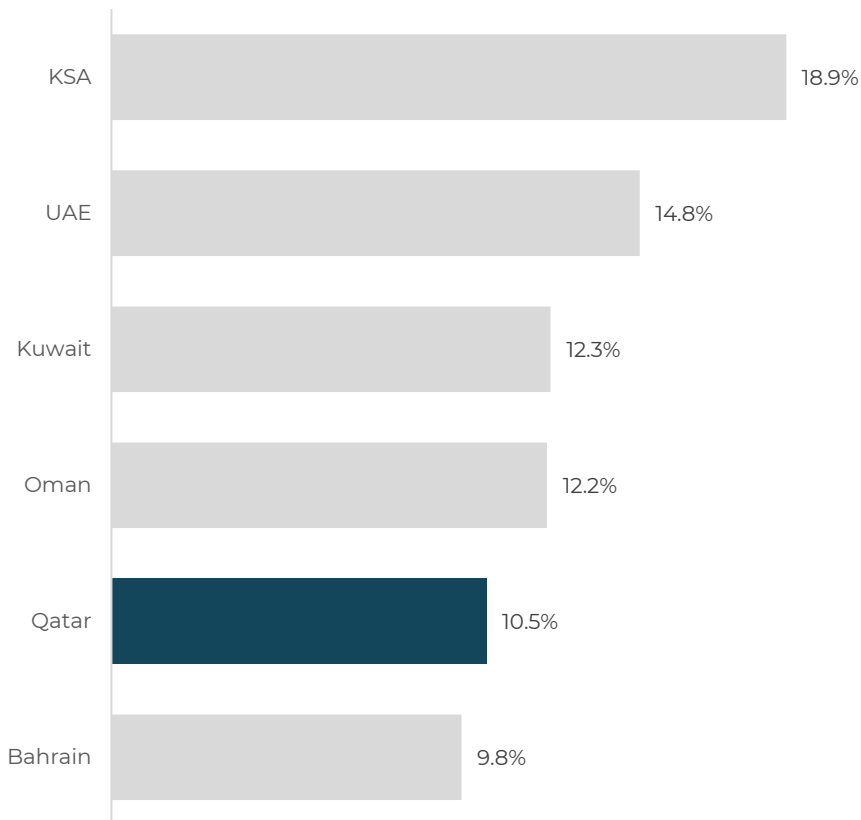
Source: PSA



K-12 Education sector in Qatar EXPENDITURE ON EDUCATION

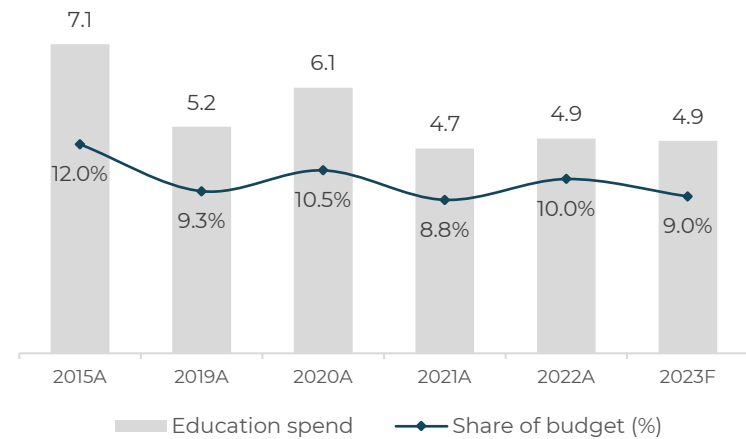
Qatar's investment in education is one of the key pillars of its future growth

GOVERNMENT SPENDING ON EDUCATION AS % OF TOTAL BUDGETED EXPENDITURE (2020A)



Source: Statista, Education ministries of GCC

BUDGET ALLOCATION TO EDUCATION IN QATAR (USDB)



Source: PSA Qatar

GCC EDUCATION SPENDING ANALYSIS

- Education is one of the major pillars of the long-term visions across Gulf Corporation Council (“**GCC**”) countries. Therefore, the GCC governments have been allocating large budgets for developing the education sector within their countries.
- Though the Qatari government expenditure is lower than the GCC average, the government has introduced several reforms through the National Development Strategy (“**NDS**”) and invested significantly in the education sector over the last few years, with a vision to create a world-class system.



K-12 Education sector in Qatar NATIONAL EDUCATION GOALS

NDS has been launched to meet goals and targets set by the QNV2030, prioritizing development for a range of projects

EDUCATION AND TRAINING INTERMEDIATE GOALS

	GOALS	TARGETS
PRE-SCHOOL EDUCATION	Provide all learners with equitable access to high-quality primary and secondary education regardless of sex, age and abilities.	Increase the proportion of resident students (aged 6-18 years) enrolled in three school levels (primary, preparatory and secondary) by 5.0%
	Improve student outcomes at a rate that suits each stage of basic education to ensure a successful transition to post-secondary education.	Increase the performance rate of students who achieve 70.0% or higher in the basic subjects of math, science, Arabic, and English by 3.0% in grades 3 and 6 and 6.0% in grades 9 and 12.
PRIMARY TO SECONDARY EDUCATION	Improve learners' 21st century competencies necessary for life and employability.	Increase the average score of students from Qatar in the international tests that include Progress in International Reading Literacy Study (PIRLS), Trends in International Mathematics and Science Study (TIMSS), and Programme for International Student Assessment (PISA) at a minimum rate of 30 points per round.
	Increase all grades 1-12 learners' awareness and pride of Qatar's values and heritage, while promoting tolerance, understanding and respect for other cultures and people.	Develop tools to measure students' understanding of Qatari and global citizenship, assess how well they apply positive values.
POST-SECONDARY EDUCATION	Improve the quality and performance of primary to secondary education staff.	Increase the percentage of teachers with appropriate and recognized teaching qualifications (diploma or bachelor of education) in public schools by 10.0% (2.0% per annum). Increase the number of teachers with professional licenses in public schools by 30.0% (6.0% per annum).
GOVERNANCE		

Source: Qatar NDS

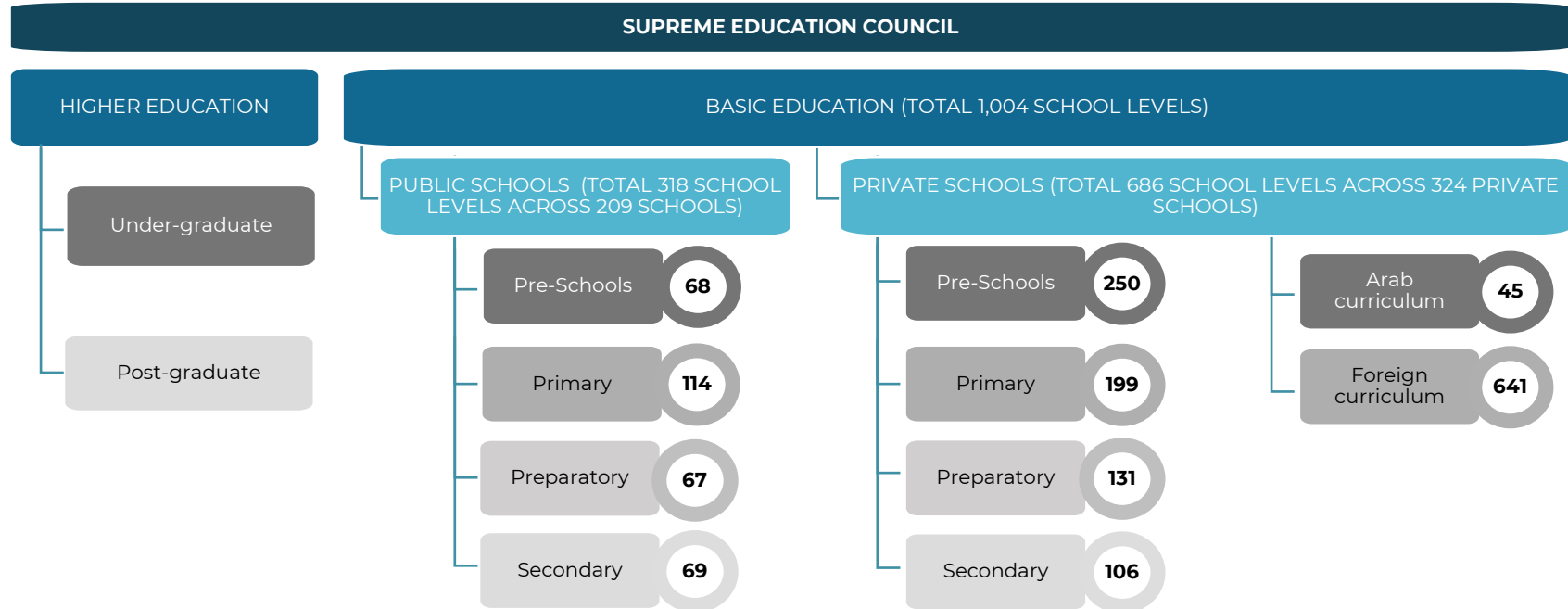


K-12 Education sector in Qatar EDUCATION SECTOR OVERVIEW

Private schools account for c.68.3% of all school levels in Qatar. 43.0% of the private schools in Qatar offer British curriculum education

OVERVIEW OF QATAR'S EDUCATION SYSTEM

- As illustrated in the chart below, the education system in Qatar is categorized into two components: basic education and higher education. When looking at supply, the Ministry of Education and Higher Education ("MoEHE") does not look at the number of schools but rather the number of school levels (i.e., pre-school, primary, preparatory, or secondary) and the number of classrooms. School levels are not to be confused with a number of schools as each school may provide more than one level of education (e.g., a K-12 school offers all four levels).



In addition to these institutions, there are 36 centers in the country dedicated to differently-abled pupils. These centers cater to all age groups and are spread across public schools, private schools, rehabilitation centers, and inclusive schools that offer education to both general and special needs students

K-12 Education sector in Qatar

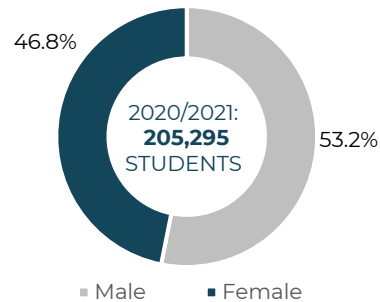
PRIVATE SCHOOL OVERVIEW

79.2% of private school students in Qatar are of foreign nationality, 51.9% of which are male students

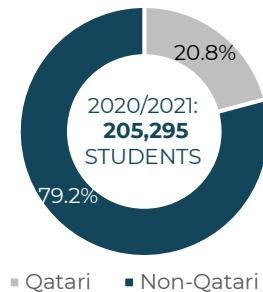
PRIVATE SCHOOLS IN QATAR

- Private schools in Qatar are categorized as follows:
 - Private Arab:** These schools are owned and operated by private entities and follow the curriculum prescribed by MoEHE.
 - International schools:** These schools are owned and operated by private entities or operated in association with international school operators. The curriculum adopted in these types of schools is either an international or foreign curriculum.
 - Community schools:** These schools are sponsored by the embassies of foreign countries. Community schools follow either international or foreign curriculums.
- There are 324 private schools in Qatar across the various education levels. The average number of classrooms per school level (private and public) is:
 - Pre-primary: 7
 - Primary: 21
 - Preparatory: 13
 - Secondary: 14
- 79.2% of the students attending private schools are non-Qatari nationals, and the remaining 20.8% of the students are Qataris.
- Private schools have a significantly higher student population due to the population mix between local and expatriates and due to the growing preference of local students to attend private schools.
- The local population's growing preference for private schools can be attributed to the following factors:
 - The inclusion of Arabic language, history of Qatar, and Islamic studies along with the international or foreign curriculums being taught; and
 - The introduction of a program by which the Qatar government assures access and provides vouchers for tuition fees of QAR28,000 for Qatari nationals for those who wish to study in qualified private international schools, which makes private school education more affordable to the Qatari population.

STUDENTS SPLIT IN PRIVATE SCHOOLS BY MALE AND FEMALE



STUDENTS SPLIT IN PRIVATE SCHOOLS BY QATARI VS NON-QATARI



Source: MoEHE

PROMINENT PRIVATE SCHOOLS IN QATAR



Source: MoEHE, school websites

K-12 Education sector in Qatar

PRIVATE SCHOOL CURRICULUMS

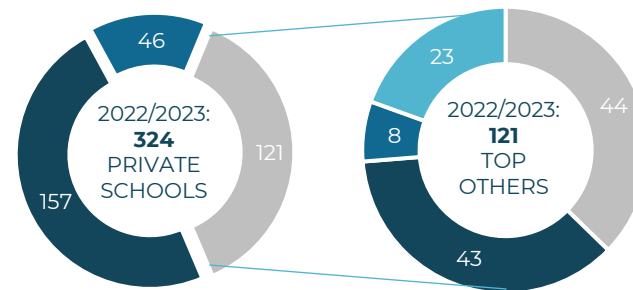
There are 60 British curriculum private schools offering grades K-12 in Qatar

PRIVATE SCHOOLS CURRICULUMS IN QATAR

Whilst the British curriculum is prominent in private schools, some schools offer both British and American IB curriculums. There is a limited number of private schools offering the British curriculum and another curriculum. At present, only five different schools offer these, and they are as follows:

- i. British and American IB:
 - o Compass International School
 - o The Gulf English School
 - o The International School of Choueifat
- ii. British and Pakistani:
 - o Bright Future International School
 - o Pak Shama School & College

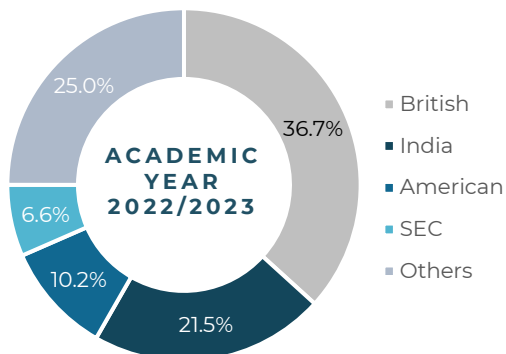
NUMBER OF PRIVATE SCHOOLS BY CURRICULUMS AND TYPE



■ British ■ American ■ Others ■ SEC* ■ Indian ■ French ■ Others

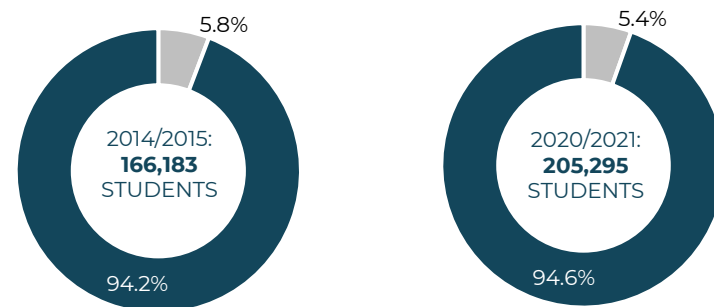
Source: MoEHE

SHARE OF STUDENTS BY CURRICULUM



Source: CH estimates based on MoEHE

STUDENTS BY ARABIC SCHOOLS VS FOREIGN SCHOOLS



■ Arabic schools ■ Foreign schools

Source: PSA

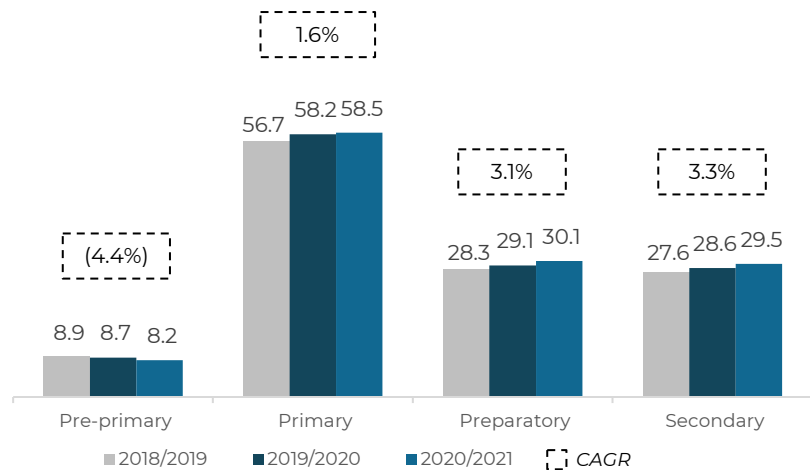
*SEC: Curriculum from Supreme Council of Education, Qatar



K-12 Education sector in Qatar STUDENT ENROLLMENT

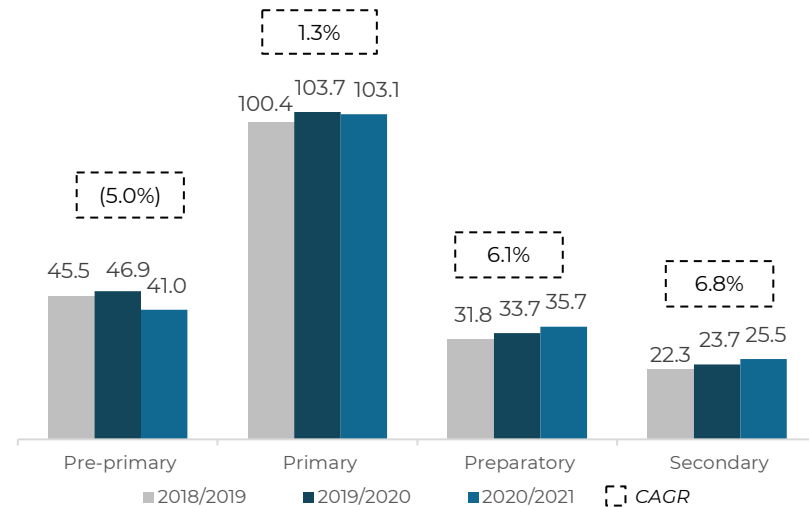
The secondary school level witnessed the highest enrolment growth rate in both public and private schools

STUDENT ENROLMENTS ('000) IN QATAR PUBLIC SCHOOLS



Source: PSA

STUDENT ENROLMENTS ('000) IN QATAR PRIVATE SCHOOLS



Source: PSA

OBSERVATIONS

- Total student enrollments in Qatar increased from 321,569 during the academic year 2018/2019 to 331,551 students in 2020/2021, representing a CAGR of 1.5%. This enrollment growth was against a comparable growth in population of 1.9%.
- The highest enrollment numbers are at the primary level; however, the secondary level witnessed the highest growth rates across the last three years. This is largely the natural result of the primary level students graduating to secondary.
- Growth in secondary-level enrollments witnessed an overall CAGR of 4.9% between 2018/2019 and 2020/2021. This growth was underpinned by a 3.3% CAGR in secondary-level enrolments in public schools and a 6.8% CAGR in secondary-level enrollments in private schools.
- The government's Public Private Partnership ("PPP") initiatives recognize the increasing demand for secondary schools, with each of the six announced PPP packages consisting of 4 secondary schools, two preparatory schools, and two primary schools.

Source: CH research and analysis

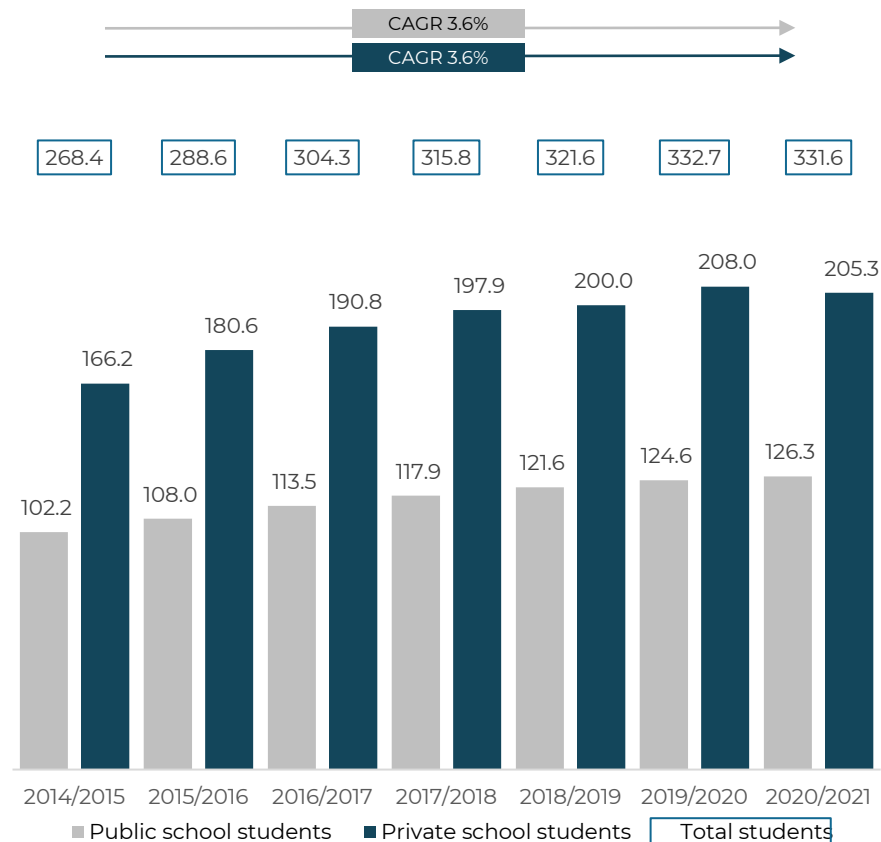


K-12 Education sector in Qatar

GROWTH IN K-12 STUDENTS

Between the academic year 2014/2015 and 2020/2021, both public and private schools have witnessed a CAGR of c.3.6%

PUBLIC VS PRIVATE SCHOOL STUDENT'S GROWTH, IN THOUSANDS



Source: MoEHE, CH analysis

PUBLIC VS. PRIVATE SCHOOL STUDENTS

- Based on the latest statistics published by the MoEHE for the academic year 2020/2021, there are a total of 1,004 school levels in Qatar, with a total number of 15,011 classrooms catering to 331,551 students.
- In the academic year 2020/2021, private school-going students account for c.61.9% of the total students.
- The total number of private school students increased from 166,183 students in 2014/2015 to 205,295 students in 2020/2021 (representing a CAGR of 3.6%).
- Private schools have a significantly higher student population due to the population mix between local and expatriates and due to the growing preference of local students to attend private schools.
- The local population's growing preference for private schools can be attributed to the following factors:
 - i. The inclusion of Arabic language, history of Qatar, and Islamic studies along with the international or foreign curriculums being taught; and
 - ii. The introduction of the Education Voucher Scheme (EVS), a subsidy program by which the Qatar government assures access and pays the tuition fees of Qatari nationals who wish to study in qualified private international schools, which makes private school education more affordable to the Qatari population. The value of the voucher is QAR28,000 per year.

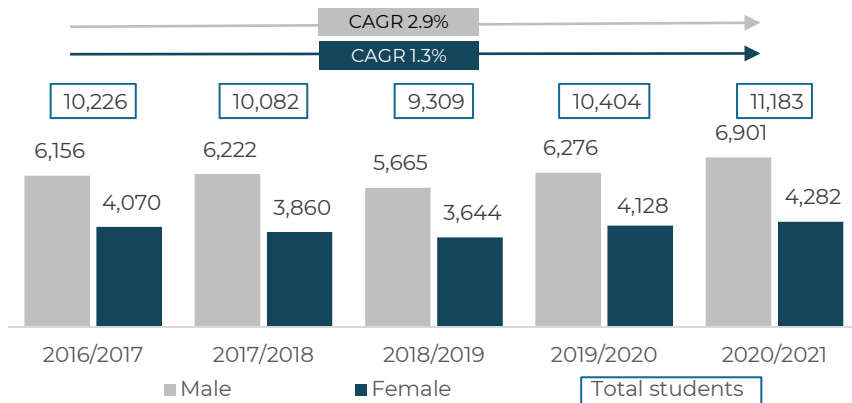


K-12 Education sector in Qatar

MALE VS FEMALE RATIO IN PRIVATE SCHOOLS

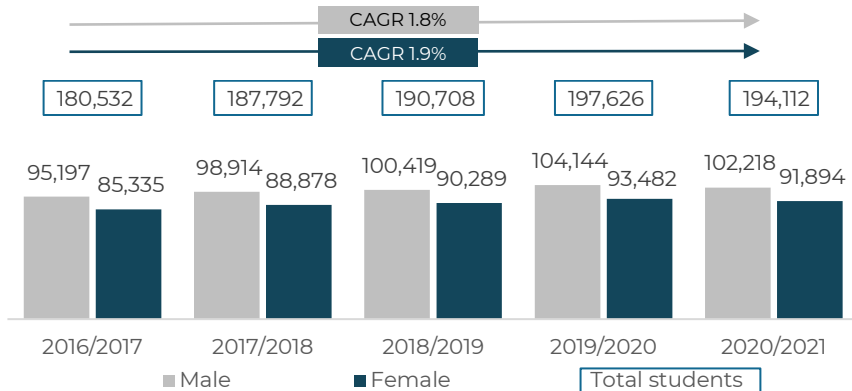
At an overall level, male students attending private schools have witnessed a higher CAGR of c.1.9% compared to female students at c.1.8% between the academic year 2016/2017 and 2020/2021

MALE VS FEMALE STUDENTS: ARABIC PRIVATE SCHOOLS



Source: MoEHE, CH analysis

MALE VS FEMALE STUDENTS: FOREIGN PRIVATE SCHOOLS



Source: MoEHE, CH analysis

KEY OBSERVATIONS

- During the academic year 2020/2021, At an overall level, the ratio of male vs. female students in the private schools stood at 53.2% vs. 46.8%. This ratio changes significantly for the private schools offering Arabic curriculum where the male vs. female ratio stood at 61.7% vs. 38.3%. Private schools offering foreign curriculum have a male vs. female ratio of 52.7% vs. 47.3%.
- The number of male students in Arabic private school increased by a CAGR of 2.9% between the academic year 2016/2017 and 2020/2021, while the female students in the Arabic private schools increased by a CAGR of 1.3% for the same period. A lot of new female enrollments in the private schools were that of foreign curriculums rather than the Arabic curriculum.
- The number of male students in foreign private school increased by a CAGR of 1.8% between the academic year 2016/2017 and 2020/2021, while the female students in the foreign private schools increased by a CAGR of 1.9% for the same period.

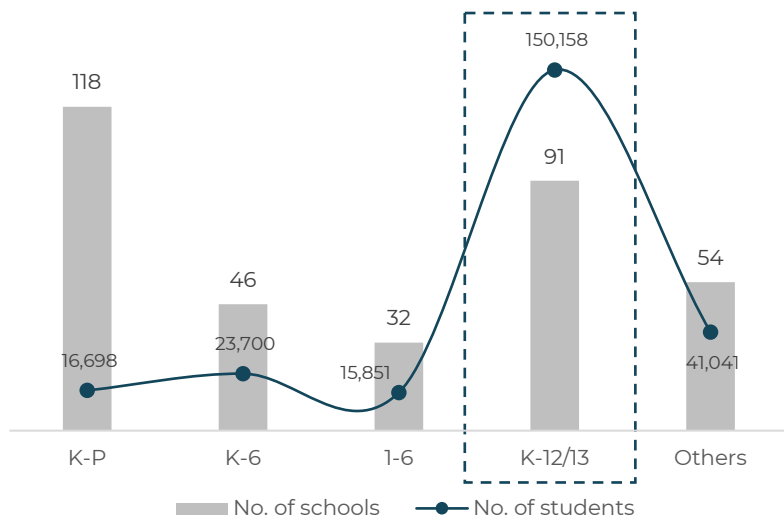


K-12 Education sector in Qatar

DISTRIBUTION OF STUDENTS BY SCHOOL FORMAT

K-12 school format remains the most preferred and caters to c.60.7% of the total student population across all curriculums

DISTRIBUTION OF STUDENTS BY PRIVATE SCHOOL FORMAT (ACADEMIC YEAR 2022/2023)



K-12/13 students (%) – 60.7%; K-12/13 schools (%) – 26.7%

Source: MoEHE

NUMBER OF SCHOOLS BY CURRICULUMS (ACADEMIC YEAR 2022/2023)

CURRICULUM	NUMBER OF SCHOOLS	CURRICULUM	NUMBER OF SCHOOLS
British	157	British, Pakistani	2
American	46	Jordanian	2
SEC	44	Pakistani	2
India	43	Palestinian	2
French	8	Sudanese	2
IB	8	Finnish	1
Tunisian	7	Bangladesh	1
Egyptian	6	British, SABIS	1
Iranian	6	Ethiopian	1
Syrian	6	General	1
American, IB	4	German	1
Filipino	3	IB, German	1
Canadian	3	Japanese	1
IB, British	2	Turkish	1

Source: MoEHE

PRIVATE SCHOOLS SPLIT BY CURRICULUM

- Among the various school formats during the academic year 2022/2023, K-12 schools accounted for c.26.7% of the total number of schools and c.60.7% of the total students.
- There are currently 23 different curriculums in Qatar; the most prominent curriculum is the British curriculum with 157 schools (45.8%), followed by American at 46 schools (13.4%), SEC at 44 (12.8%), and Indian curriculum with 43 (12.5%) schools.
- As per MoEHE, the number of schools offering kindergarten levels increased from 315 in 2019/2020 to 318 in 2022/2023 (representing an increase of 3 kindergarten levels).



K-12 Education sector in Qatar

KEY MARKET HIGHLIGHTS

MARKET HIGHLIGHTS

EXISTING SCHOOLS EXPANDING

New schools opened between academic year 2018/2019, and 2020/2021 are essentially new branches of existing players taking advantage of their reputation and favorable market conditions.

PRICE POINT

Based on the schools surveyed, those falling in the high fee bracket have witnessed an increase in students between the academic year 2018/2019 to 2020/2021. Few schools witnessed a drop during 2021/2022.

NEW SUPPLY

Between the academic years 2019/2020 to 2021/2022, the total number of British schools increased from 135 to 161. In the academic year 2021/2022, nine schools* added approximately 187 new classrooms to the supply.

LOCATION

Lusail and its proximity are becoming the preferred location for the operators due to the developments in the area.



SCHOOL INFRASTRUCTURE

The newly opened schools are purpose-built with the state-of-the-art facility offering the highest quality of education.

INCREASING QATARI SCHOOL GOING POPULATION

Qatari students attending private schools have witnessed a higher growth rate of CAGR c.10.5% compared to non-Qatari students at c.3.3% between the academic year 2013/2014 and 2020/2021

K-12 SCHOOLS

The new opened branches of existing schools are mainly in the K-12 format.

*Includes schools such as Edison Academy Lusail, Sherborne Senior School, and Pearling Seasons International Schools

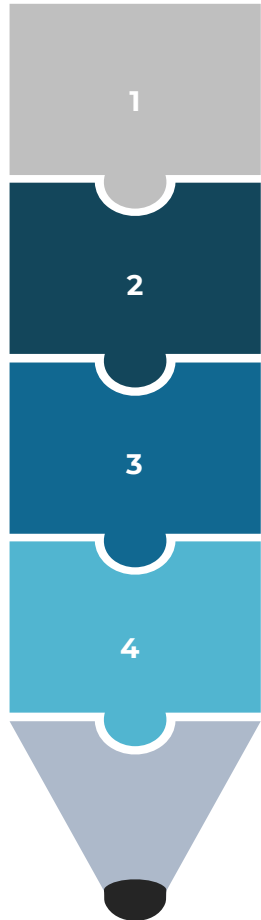


K-12 Education sector in Qatar

K-12 SCHOOL PEER SET – KEY FACTS

While all the schools have purpose-built facilities, a select handful of recently opened schools have the most state-of-the-art setups

K-12 SCHOOL PEER SET – KEY TAKEAWAYS



FACILITIES

Most prominent K-12 British schools have purpose-built facilities with a land area between 15,000 to 30,000sqm, except for Doha College and The Hamilton International School, which have a total land area of 90,000sqm and 50,000sqm, respectively. The gross land area per student for Doha College and The Hamilton International School is 25.7sqm and 15.5sqm, respectively, while the other schools have an average gross land area of 16.1sqm per student.



STUDENT ENROLLMENT

While most of the K-12 schools forming the peer set have no waiting list, the reputed schools are witnessing growth in student enrollments. Among the top schools, Durham Girls and RGS grew at a CAGR of 54.2% and 32.3% between academic year 2018/2019 and 2020/2021.



FEE

Prominent schools have annual school fees ranging between QAR46,000 to QAR75,000.



DEMOGRAPHIC MIX

The demography of the students depends on the location and type of school. The expat student community dominates international schools. Exceptionally, 99.0% of Durham Girls School students are Qatari, which is driven by the school being girls-only.



K-12 Education sector in Qatar

SWOT ANALYSIS

Qatar's strong economy has facilitated substantial investments in the development of the education sector.



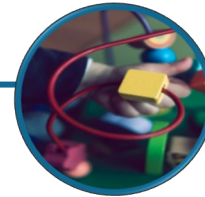
STRENGTHS

- The government is committed to developing the education sector, which is considered important in achieving economic diversification.
- Qatar is taking strategic initiatives to develop the education sector to make it one of the most advanced in the region.
- The high presence of foreign universities and schools, partly due to funding from the Qatari government, has also contributed to improving the quality of education. The nation is ranked 4th on government efficiency, 13th on the institutional framework, and 41st on infrastructure related to education in the "2023 Global Competitiveness Index" by the International Institute for Management Development.



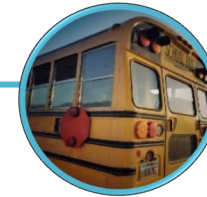
WEAKNESSES

- The shortage of teachers is a major challenge that is expected to become severe in the years to come. The high living costs in Qatar and the rising demand for teachers in their home countries continue restraining the retention of experienced personnel.
- Because only a few schools adhere to the top-down approach, teachers and administrators possess minimal or negligible authority to enact alterations within the system.
- Despite previous efforts to modernize education, there have been minimal endeavors to establish a connection between student performance and overall school performance.



OPPORTUNITIES

- QNV2030 aims to bring changes in the education system through changes in the curriculum of the universities, implementation of online learning portals, increasing the number of schools and universities, and adding several new courses.
- The private school sector in Qatar is poised to achieve a market value of QAR8.7b in 2023F, fueled by several factors. These include the increasing number of school-aged individuals, a surge in student enrollment, higher tuition fees, and a notable shift in preference towards private school admissions.
- The government, through its PPP initiatives, aims to attract private investors.

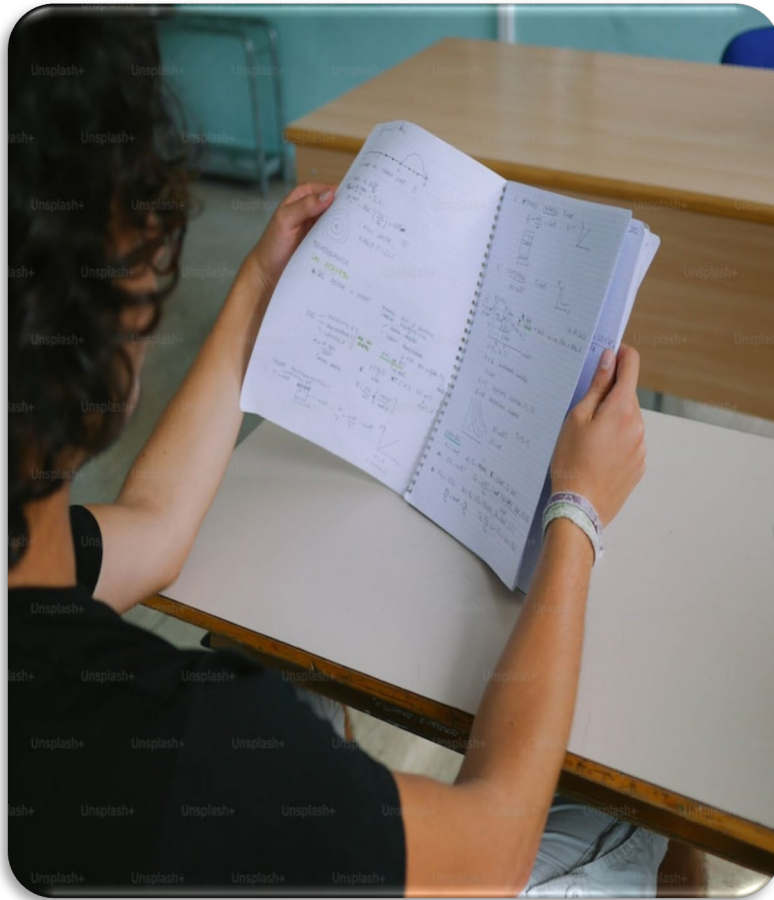


THREATS

- The regulation of fees by MoEHE, which includes rules such as allowing fee increases only for schools experiencing financial losses, may potentially deter prospective new entrants, including foreign investors, from establishing schools in the country.
- Competition is mainly centered around the mid/low segment of schools which has witnessed an erosion in student numbers.

K-12 Education sector in Qatar

CONCLUSIONS



FINAL THOUGHTS

- The education sector in Qatar is experiencing rapid growth, primarily propelled by factors such as the increasing number of expatriates, the emergence of international educational institutions, a growing desire for private education, and rising demand for higher studies.
- In line with the QNV2030, which emphasizes effective teaching, improved learning outcomes, enhanced curricula, and increased efficiency and productivity in the education system, the government of Qatar has proactively allocated a substantial annual budget. This initiative demonstrates the government's commitment to advancing the education sector.
- Despite the significant growth in Qatar's education sector, several challenges and threats must be addressed. These include intensifying competition, high education fees, and difficulties in implementing timely changes to the system, which hinder continuous growth within the sector. These challenges require attention and proactive measures to ensure sustained progress in Qatar's education landscape.
- There is sufficiently current and future demand to accommodate additional private schools – the British curriculum being the highest in demand, followed by the American curriculum.
- Due to the relatively limited supply, the average school utilization rate is high. As better-quality supply increases (which is the current aim of the MoEHE), pupils will have more options and will transfer to higher-performing schools. Therefore, new schools are not purely dependent upon additional demand but can achieve their utilization targets by attracting pupils from existing schools.
- The quality of education and school facilities will be a key factor in the level of success of new private schools in the future. It is essential that any new school offers the latest in teaching techniques/technologies and can differentiate itself by offering high-standard facilities and in-demand extracurricular activities while offering fees within market-acceptable ranges.



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