



# 2012-2013

PRIVATE SCHOOLS LANDSCAPE IN DUBAI



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# Private Schools Landscape in Dubai

2012-2013

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## Message from Dr Abdulla Al Karam

**Director General and Chairman of the Board of Directors,  
Knowledge and Human Development Authority**

Over the last year Dubai has witnessed prolific growth across key strategic sectors. Tourism remains a key strength for Dubai, with annual visitor numbers expected to double to 20 million visitors by 2020. The real estate and construction industries also continue to expand, creating greater employment opportunities and increased demand for skilled professionals.

As Dubai's economy continues to develop, the need for high quality education becomes ever more crucial. World-class schools and universities are instrumental in enabling Dubai to attract and retain skilled professionals. With more than half of all new teachers to Dubai being recruited from other countries, Dubai continues to be a highly desirable destination for talented educators.

Since KHDA was established in 2007, 30 new schools have opened, including six in 2012/13. The private schools sector in Dubai continues to show robust growth year on year. While student enrolment increased by 7.1% in the last academic year, this rate increased to 8.7% for the 2012/13 academic year.

Accurate, up-to-date data is vital to ensure transparency and continued growth of the sector. The data contained in the Private Schools Landscape allows potential and existing schools to make informed decisions. This data gives schools, universities, policy makers, parents and teachers insight into Dubai's private schools sector, revealing a global view of their community.

I would like to take this opportunity to thank private schools in Dubai for their assistance and support in creating this report, and look forward to working with them to ensure that we continue to deliver high quality education to students and promote the growth of Dubai.

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## Key Data

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### Students

Number of students in private schools in Dubai = **225,099**

Growth of the total private school student population since the previous academic year = **8.7%**

Proportion of all Dubai students attending private schools = **88.7%**

### Growth in Student Enrolments

Growth in student enrolments since the previous academic year by:

Phase of school	
KG	14.7%
Primary	8.0%
Middle	8.5%
High	5.1%

Main curriculum type	
UK	8.9%
Indian	10.0%
US	7.5%
MoE	1.1%

2012-2013 DSIB Rating	
Outstanding	6.9%
Good	7.7%
Acceptable	8.6%
Unsatisfactory	1.1%

### Teachers

Number of teachers in private schools in Dubai = **14,333**

Growth of the teacher population since the last academic year = **8.7%**

### Schools

Number of private schools in Dubai = **153**

Types of curricula on offer in Dubai's private schools = **15**

## School Capacity

Capacity utilisation rate (number of enrolments divided by number of spaces available) by:

Phase of school		Main curriculum type		Average tuition fee of the school		2012-2013 DSIB Rating	
KG	93.4%	UK	93.6%	Less than 10,000 AED	96.5%	Outstanding	96.3%
Primary	93.4%	Indian	93.6%	10,000 to 20,000 AED	85.5%	Good	90.9%
Middle	90.7%	US	82.7%	20,000 to 40,000 AED	80.5%	Acceptable	89.5%
High	81.6%	MoE	92.7%	More than 40,000 AED	90.8%	Unsatisfactory	85.0%

## Market Size

Private school market size (based on pupil enrolment multiplied by average tuition fee) = **AED4.1 billion**

## Introduction

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The private school sector dominates the education landscape in Dubai, with 88.7% of Dubai's students enrolled in private schools. Private schools provide Kindergarten, primary, middle and secondary education to the large population of children that have come to Dubai from around the world. Private schools also cater to the majority (56.6%) of Emirati students. The growth of the private school sector in Dubai has been swift, matching that of its rapidly expanding population.

Dubai's private school system is unique. Of those education systems with a significant proportion of their student population in private schools, Dubai is the only one that has nearly all of its private school students in schools that are not only managed independently from government but also have less than half of their core funding from government sources. In Dubai, school revenues are comprised almost wholly of tuition fees paid for by parents or their employers. Non-Arab expatriate students can only attend private schools.

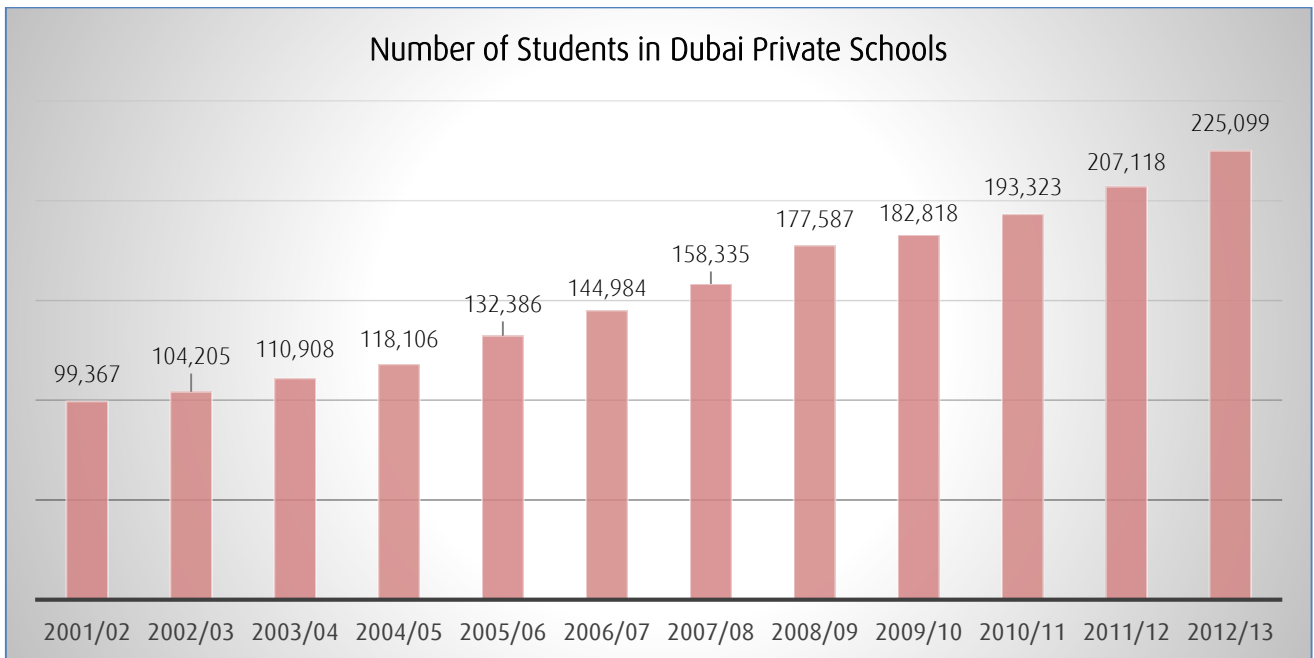
This report provides a snapshot of the state of Dubai's private school landscape in the 2012/13 academic year. It provides statistics and historical trends to showcase how the private school sector has changed. This report is intended to provide policy makers, schools, researchers, investors, the media and parents with important data about private schools to encourage continued private investment in the sector and improvements in the quality of education.

The data presented in this report have been gathered through the collaboration of school administrations. This academic year marks the first time that student-level data has been provided by most schools to KHDA using an electronic system. The data enable more detailed analysis to be presented as each student's details of their enrolment are recorded and updated. Data collected include the gender, nationality, age, class, and special educational needs status of each student. Other data have been collected with the assistance of the Dubai Statistics Centre, where schools have entered their records using summary tables. Separate tables were used to collect data on the numbers and qualifications of teachers and administrative staff, along with various other aspects associated with school life.



## Students in Dubai's Private Schools

The number of students in a private school in Dubai varies greatly, ranging from less than 20 to many thousands of students in some of the larger Indian curriculum schools. Each year, private schools in Dubai experience solid growth in student enrolments, in line with the expanding population of Dubai and the UAE as a whole. The number of students in Dubai's private schools has doubled over the past decade. In the 2012/13 academic year, 225,099 students enrolled in private schools in Dubai. This is an increase of 17,981 students from the previous academic year.



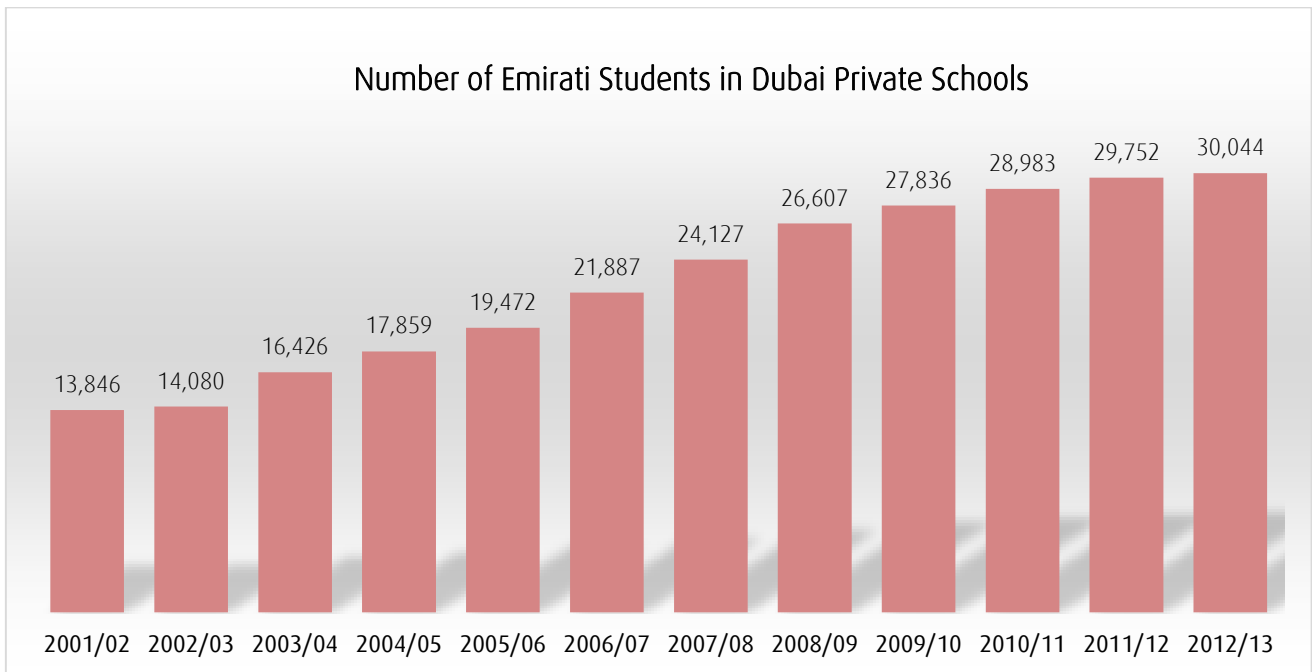
Over the last decade, the average annual growth rate of private schools in Dubai is 7.3%.

Annual growth rates have fluctuated between 3.1% and 12.2%. Student enrolments in 2012/13 are 8.7% higher than the previous academic year. The growth is higher than the 7.1% recorded in the previous academic year and is the third year in a row of accelerating growth in the private school student population.

## Emirati Students in Dubai's Private Schools

The growth rate in student numbers in Dubai's private schools is driven by, in part increasing numbers of Emirati students. The number of Emirati students enrolled in private schools has increased year-on-year since 2001. In 2012/13, there were 30,044 Emirati students enrolled in private schools. Emirati students comprise 13.4% of the total student population in Dubai's private schools.

The number of Emirati students in private schools has more than doubled over the last ten years at an annual average growth rate of 6.2%. This growth has stemmed from an overall increase in the number of school-age Emirati children in Dubai, plus a growing trend for Emiratis to prefer private schools over public schools.

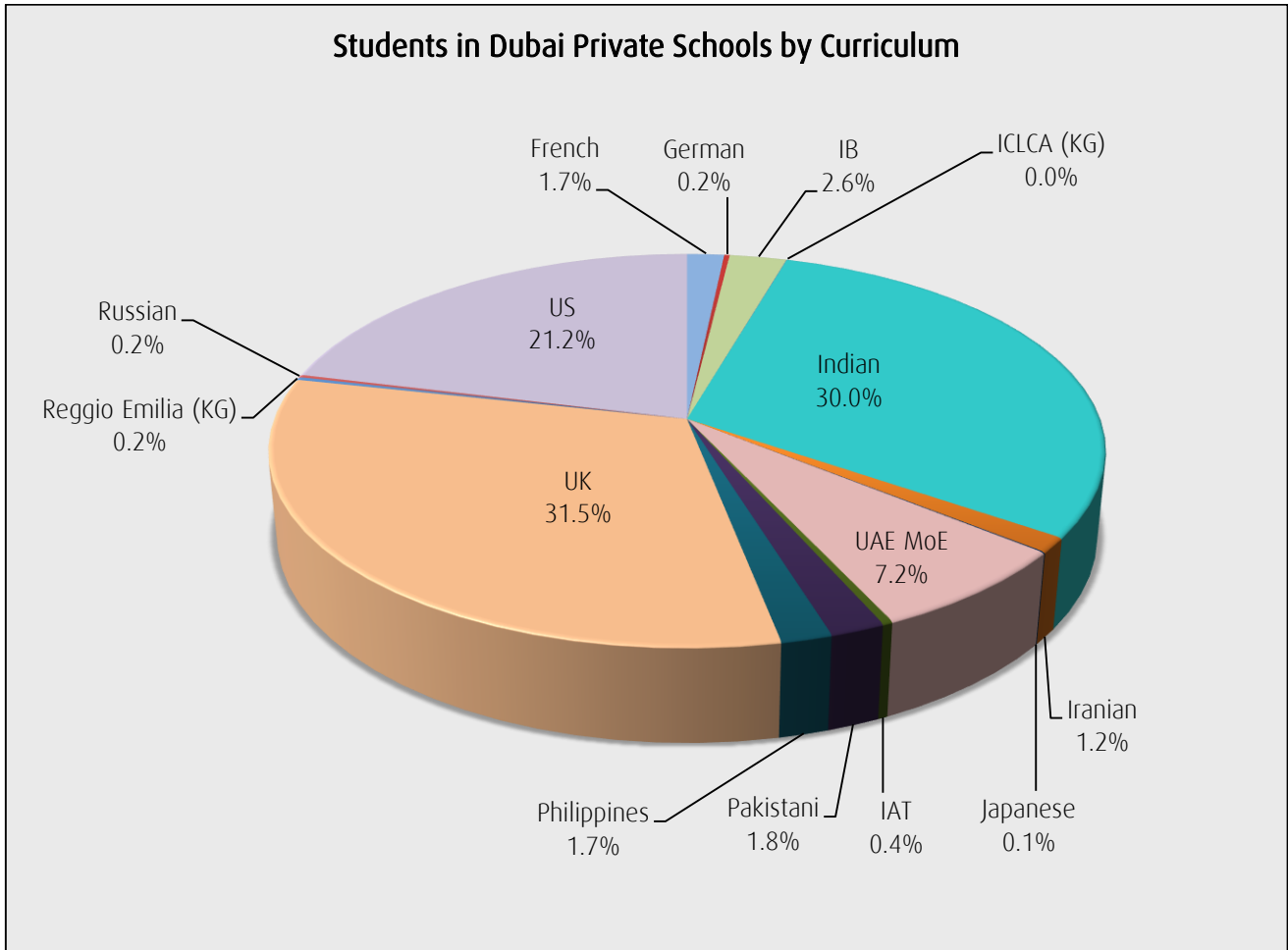


More than half (56.6%) of Emirati students in Dubai currently attend private schools. Over the last ten years, this proportion has grown from 34% to 57%. The trend towards private school preference has stabilised in the past five years, during which Emirati enrolment has consistently been between 56% and 57%.

More Emirati boys than girls are enrolled in private schools. Overall, 57% of Emirati students in private schools are boys. This indicates a slight preference for Emirati parents to favour private schools for their sons and public schools for their daughters.

## Number of Students by Curriculum

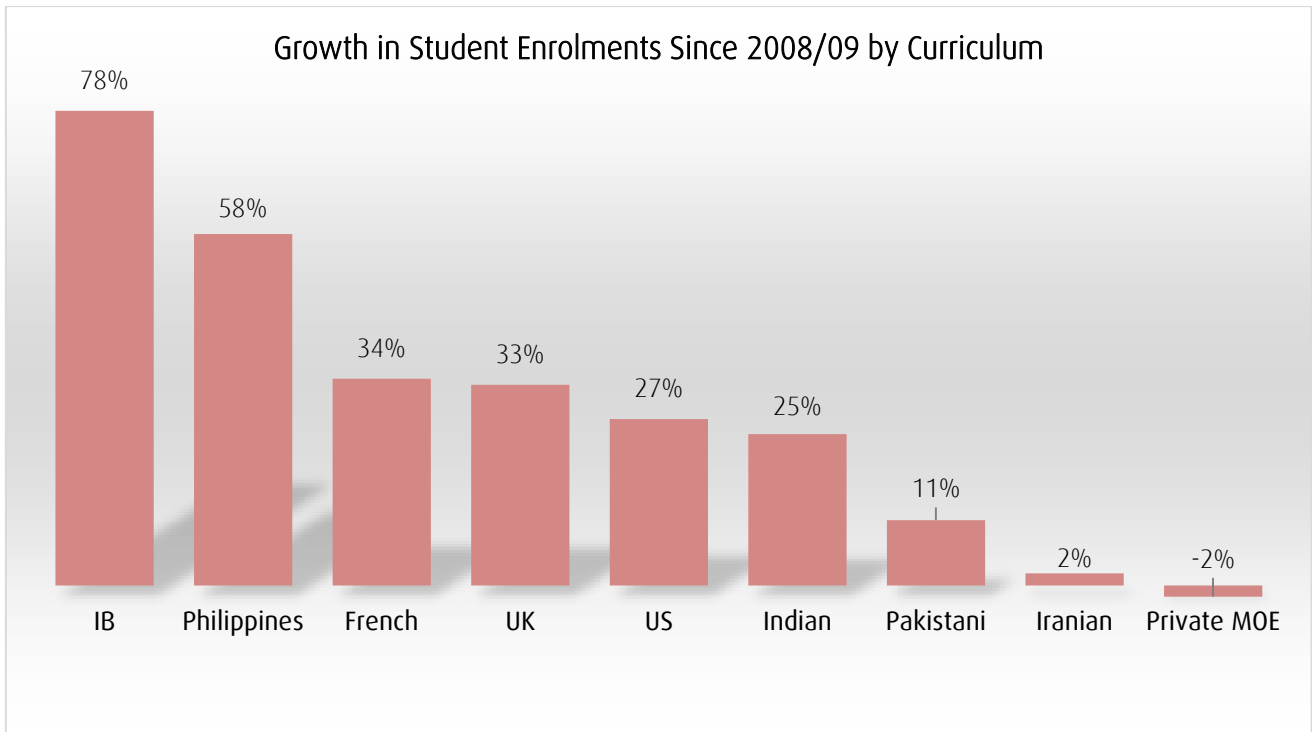
Private schools in Dubai offer 15 different curricula<sup>1</sup>. Schools following national curricula from the UK, US, India and the UAE Ministry of Education (MoE) cater to 90% of the private school student population. The number of students at UK curriculum schools is the highest, with 70,860 students or 31.5% of all private school enrolments.



<sup>1</sup> KHDA categorises schools according to their main curriculum. This is based on the number of phases within the school where the main curriculum is implemented. Most schools are divided into four phases. For example, some UK and US curriculum schools also offer the IB Diploma Programme to students in senior years. For this report, we have categorised them as UK or US curriculum schools. Some of Dubai's UK and US curriculum schools who have achieved an unsatisfactory or acceptable inspection rating do not follow closely their stated curriculum. This causes confusion if those schools are included within a particular curriculum grouping. Also, some other schools cannot be categorised as following a particular national curriculum due to their specific approaches to the delivery of that curriculum. As a result of these anomalies, KHDA, in partnership with international agencies, has commenced a project to develop new categorisations of schools that will be used in subsequent reports. In addition an expanded educational permit will provide better information to parents about the type of education on offer in each school.

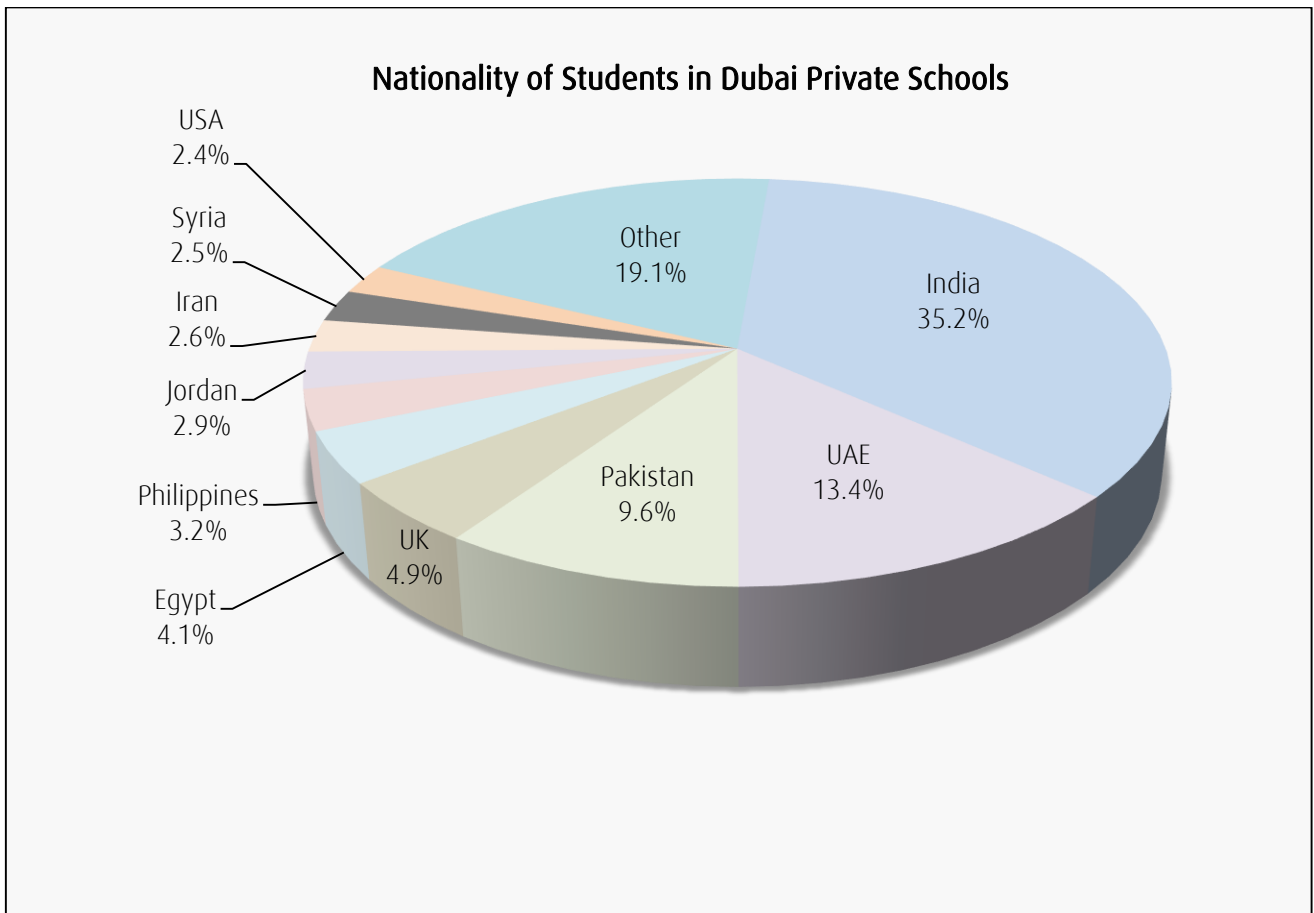
Private School Students by Type of Curriculum		
Total Students	Type of Curriculum	Schools
70,860	UK	53
67,629	Indian	24
47,719	US	35
16,085	UAE Ministry of Education	13
5,807	IB	7
4,158	Pakistani	3
3,862	Philippines	2
3,762	French	4
2,717	Iranian	6
791	Institute of Applied Technology (UAE)	1
548	German	1
541	Reggio Emilia (KG)	1
456	Russian	1
135	Japanese	1
29	International Curriculum for Languages and Creative Arts (KG)	1
225,099	Total	153

Annual growth rates of student enrolments at schools differ according to the curriculum. Growth in student enrolments is lowest in Private MoE and Iranian curriculum schools, where there have been almost no changes in student numbers over the last four years. Enrolments are increasing at a faster rate in UK curriculum schools than in US and Indian curriculum schools. In the other school curricula attended by a minority of school students, higher growth is occurring in schools following the IB, Philippines and French curriculum.



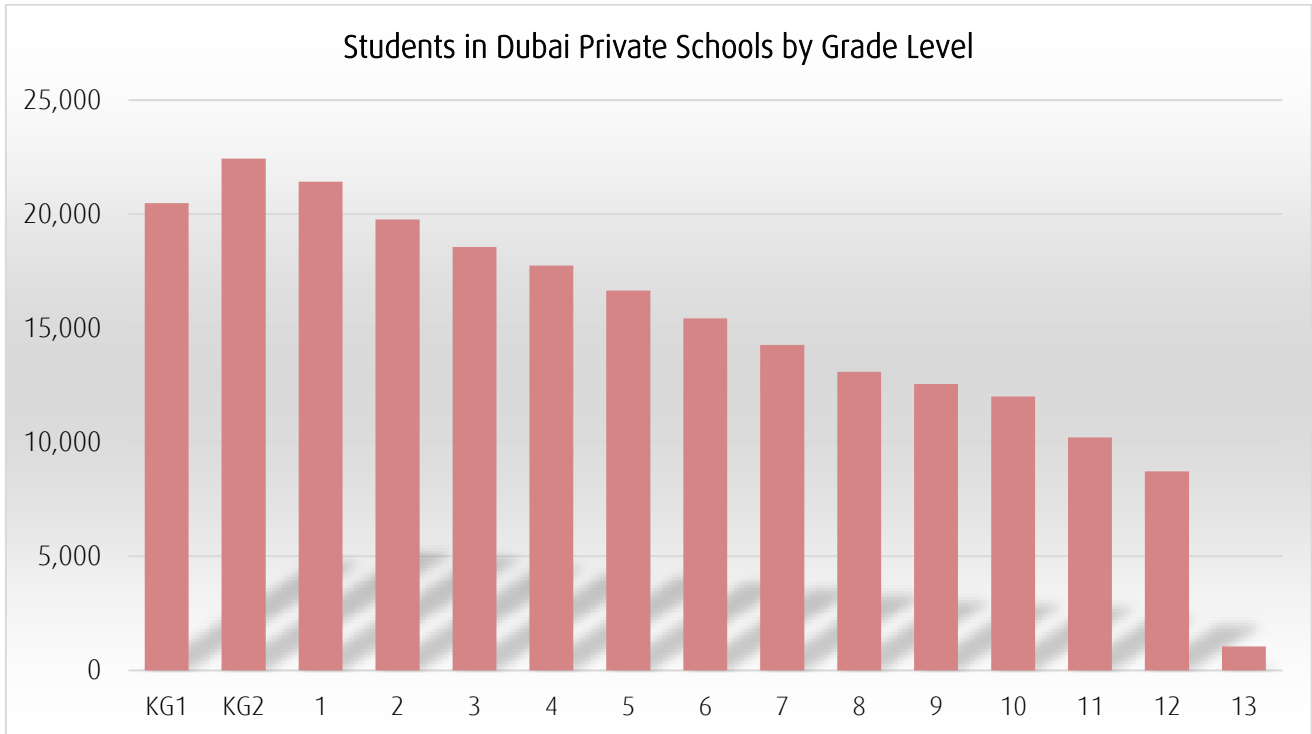
## Nationalities of Students in Private Schools

Reflecting its historical development as a hub between East and West. Dubai has a wide range of nationalities for its students at private schools. In 2012/13, there were students of 177 different nationalities attending schools in Dubai. In keeping with the adult population, students from the subcontinent comprise nearly half (47%) of the students attending private schools. Students with Indian nationality comprise more than one-third of the students at private schools. Students from Middle East and North African countries, including Emiratis, comprise 27% of the private school student population.



## Number of Students by Grade Level

Dubai's private schools have more students in junior grades than in senior grades.<sup>2</sup> This is due to a number of factors. Firstly, the growth in the general population and secondly, some families leave Dubai when their children get older. Overall, there are approximately twice as many students in Grade 1 as in Grade 11.

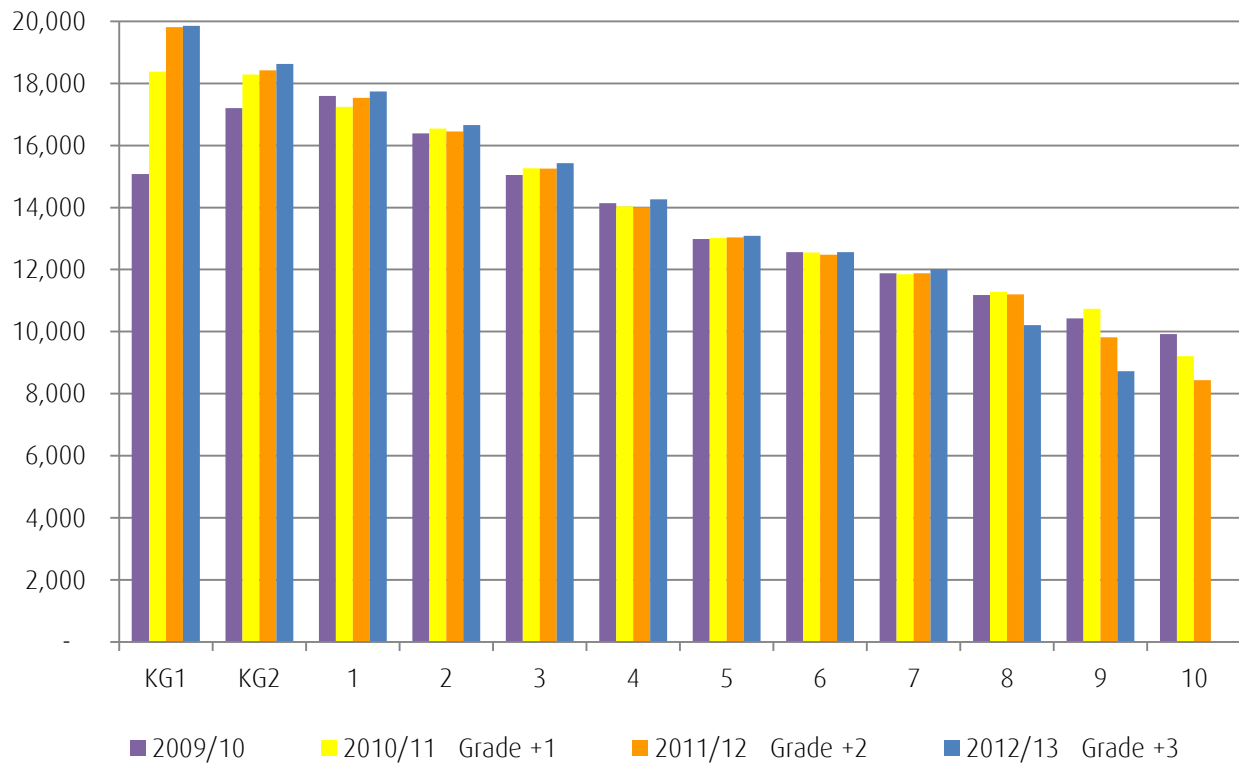


While the above chart appears to show a considerable decline in student numbers as they progress from one grade to the next, cohort analysis from multiple years of data reveals that this is not the case.

The following chart shows that a similar number of students are enrolled in the next grade in the following year as a particular cohort of students progresses through schooling. For example, there were 14,143 students in Grade 4 in 2009/10. As these students progressed through to Grade 5 in 2010/11, Grade 6 in 2011/12 and Grade 7 in 2012/13, the number of enrolled students in that cohort always remained between 14,000 and 14,300. If this trend continues then the number of students in Grade 1 in 2012/13 will approximate the number of students enrolled in private schools in Grade 9 in eight years' time. If the number of students enrolled in Kindergarten and Grade 1 increases by 7% each year, then it is projected that Dubai's private school student population will double over the next ten years.

<sup>2</sup> Different school curricula have different starting ages for Kindergarten. In addition, some curricula may have 13 years of schooling before graduation like the UK or IB curriculum, while others have 12 years of schooling like the US or Indian curricula. In this report, Grade 1 in a US curriculum school is considered to be the equivalent of Year 1 in a UK curriculum school.

## Tracking Student Cohorts in Dubai Private Schools



Some variation occurs at both ends of schooling. From KG1 to KG2 and from KG2 to Grade 1, an increasing number of students enrol in Dubai's private schools in each cohort as students commence school without attending school Kindergartens in Dubai. At the senior end, Dubai's private schools have a reduction of students after Grade 10, with a small proportion of expatriate students leaving Dubai to complete their school education in their home countries.

In 2012/13, the highest rate of growth of student numbers from the previous academic year occurred in the KG phase of school, with an increase of 14.7%. It is expected that this high growth in KG students will lead to continued growth of student enrolments in Dubai's private schools in subsequent years as this cohort of students progresses through schooling.



## Teachers in Private Schools

In the 2012/13 academic year, private schools employed a total of 14,333 teachers. This is an increase of 8.7% from the previous year and is in line with the increase in student enrolments. Similar to last year, 80% of teachers are female and 20% male. There is a significant gender difference across the schools, with less than 1% of the teachers in Kindergarten classes being male while in the senior grades 39% of the teachers are men. There are 24 Emirati teachers in private schools in Dubai. The student-teacher ratio in Dubai's private schools is 16 students for every teacher.

Teachers in Private Schools			
Phase	Male	Female	Total
Kindergarten	8	2,151	2,159
Cycle 1 / Primary	705	5,058	5,763
Cycle 2 / Middle	1,169	2,670	3,859
High/ Secondary	999	1,553	2,552
<b>Total</b>	<b>2,881</b>	<b>11,452</b>	<b>14,333</b>

Emirati Teachers in Private Schools			
Phase	Male	Female	Total
Kindergarten	0	8	8
Cycle 1 / Primary	1	7	8
Cycle 2 / Middle	0	2	2
High/ Secondary	0	6	6
<b>Total</b>	<b>1</b>	<b>23</b>	<b>24</b>

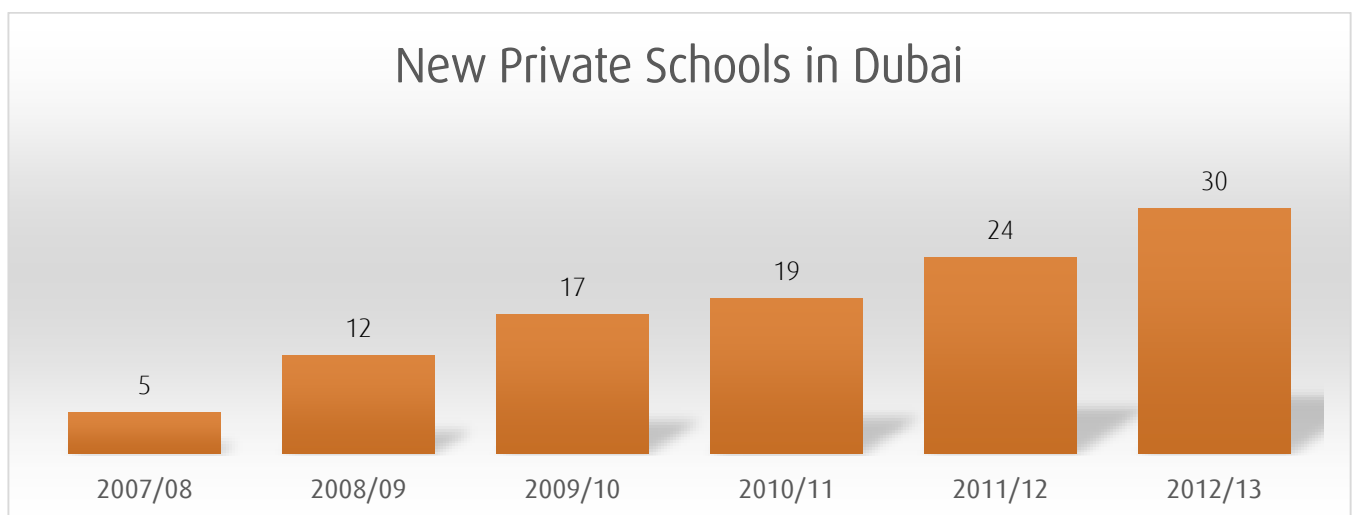
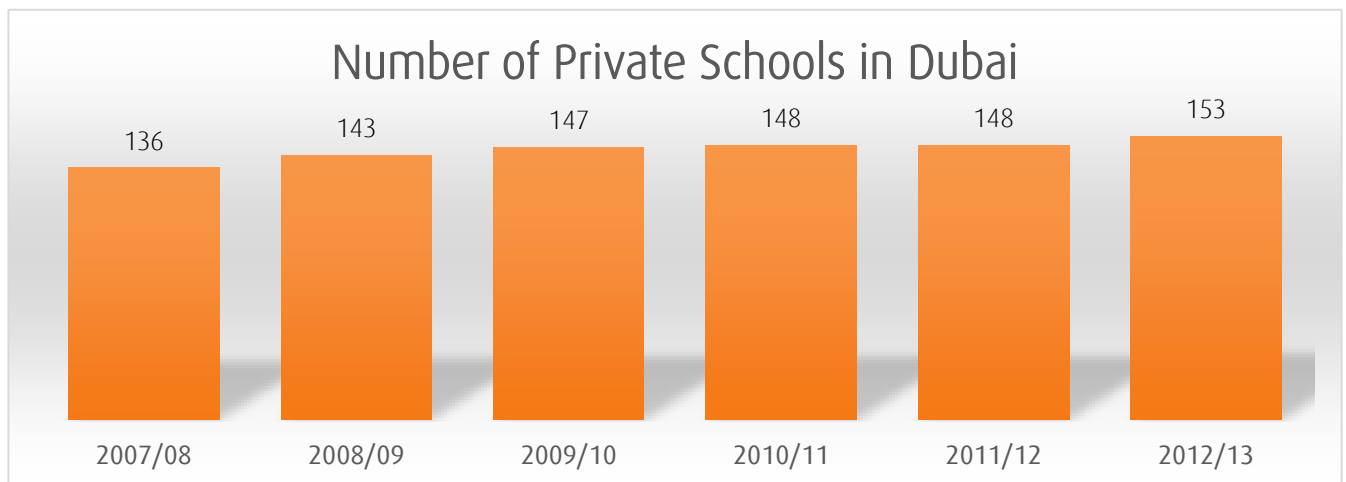
Since last academic year, a greater proportion of teachers at private schools (92% compared with 90%) has a university degree. Half of the teachers employed in Dubai's private schools have a degree in education, while a further 21% have some form of postgraduate degree. Overall, 26% of the teachers live in another emirate, the majority residing in Sharjah.

Annual teacher turnover remains significant. Approximately 16% of the teachers that were teaching in a private school last academic year were not teaching at that school the following year. Given the growth in the number of teachers required to keep pace with student enrolments, the proportion of teachers new to a school is relatively high with 23.4% of all teachers being new to their school in 2012/13. More than half of these new teachers to private schools have been recruited from other countries.

## Private Schools in Dubai

Private schools<sup>3</sup> cater to children’s education from Kindergarten through to completion of secondary school, spanning an age range of three or four to 17 or 18 years old.

In the 2012/13 academic year, there were 153 private schools operating in Dubai, an increase of five from the previous year. Six schools opened and one school closed in the last year. A total of 30 schools have commenced operations since KHDA was established in early 2007.



<sup>3</sup> For the purposes of this report, a private school in Dubai is considered to be a school that is not a public school operated by the UAE Ministry of Education. Nurseries, pre-kindergarten classes at schools, higher education, adult education and private tutoring centres are also excluded from this report.

Private schools can operate on a for-profit or not-for-profit basis. A total of 32 of the 153 private schools operate on a not-for-profit or non-commercial basis and 17% of the private school student population attend these schools.

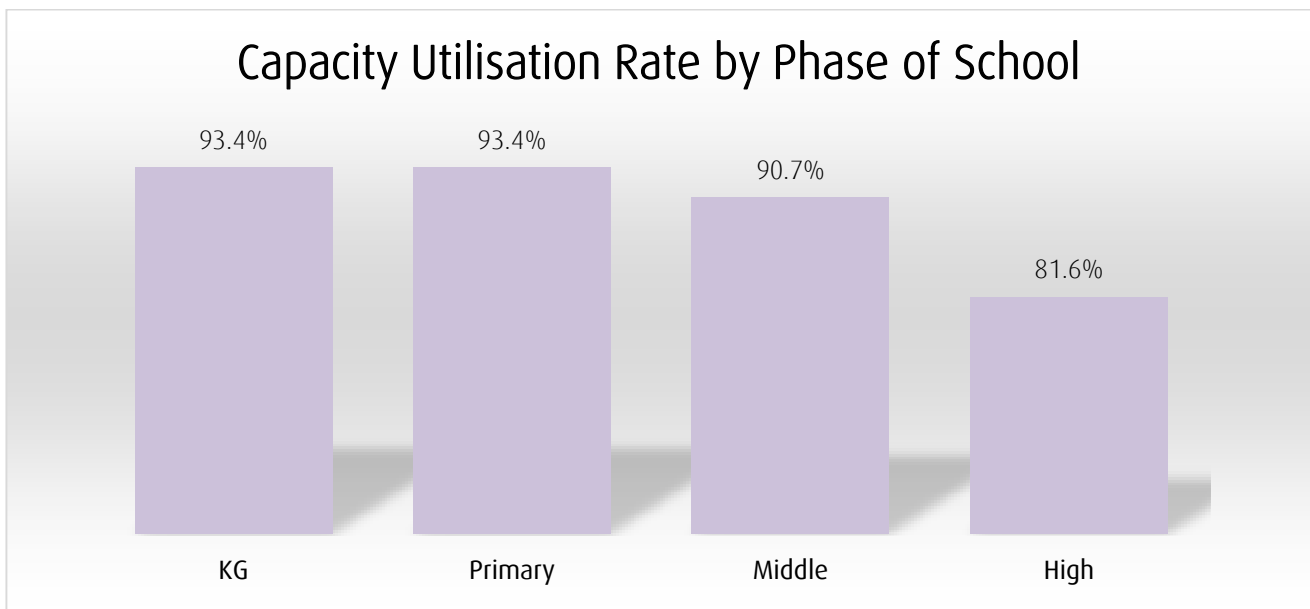
There are some businesses that operate a number of private schools in Dubai. The three operators with the most number of schools are GEMS Education, Taaleem and Innoventures. GEMS Education has 19 schools, accounting for 25% of Dubai's total private school student enrolments. Taaleem has seven schools, with 1.8% of all private school students. Innoventures' four schools enrol 2.3% of the total private school student population. The other player with significant market share is the not-for-profit Indian High School group, which has three schools with 4.9% of the private school student population.

## School Capacity

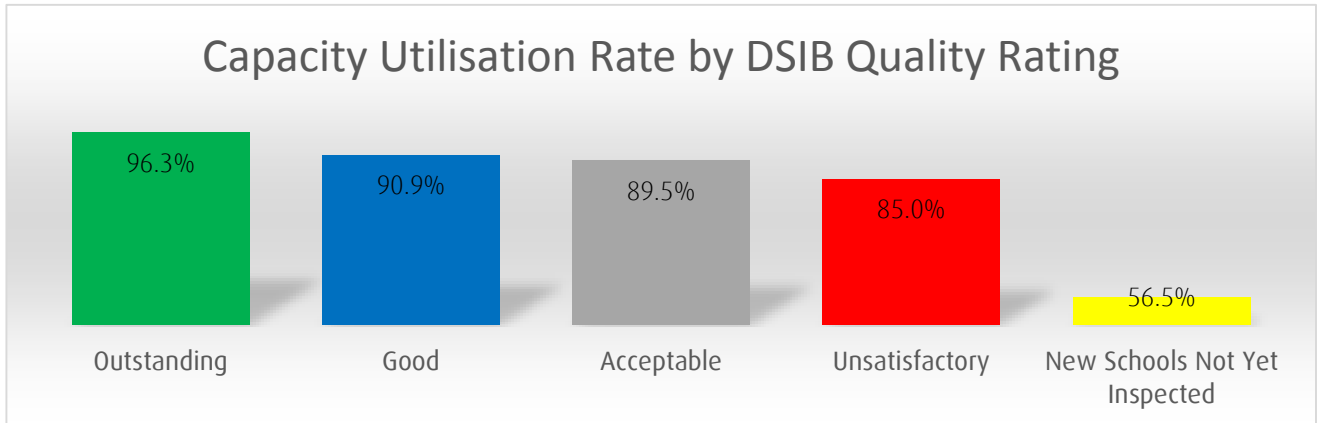
School systems need to strike a balance between having sufficient spare capacity to take in new students while not having large amounts of space unutilised. Those systems that are experiencing significant growth, such as Dubai's private school system, need to be weighted towards having larger amounts of extra capacity to accommodate incoming students.

A capacity utilisation rate measures the proportion of all available places at schools that are filled by students. In Dubai, 89.5% of all the available places at private schools are used by enrolled students. The distribution of spare places is not uniform, with certain high quality private schools in high demand with long waiting lists for places.

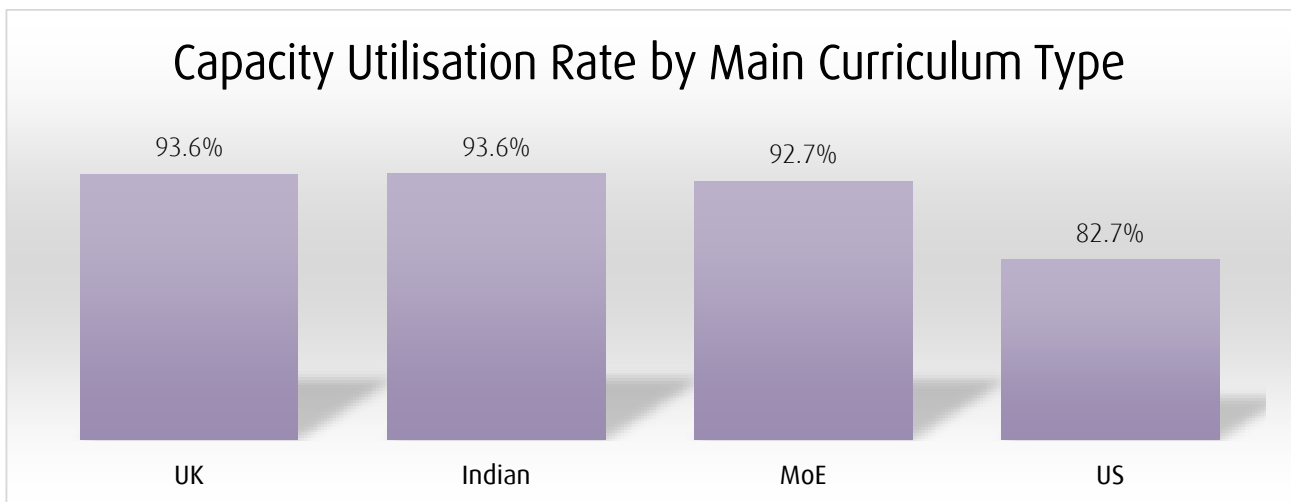
The existing private schools in Dubai have the capacity to take some 26,000 additional students. Of the spare places that schools allocate to a particular phase, there is significantly higher capacity utilisation (meaning fewer spare places) at the junior phases of school compared with the more senior grade levels.



High quality private schools attract more students. The high demand for places leads to increased capacity utilisation rates. Outstanding schools in Dubai have fewer vacant places as compared with other private schools in Dubai. Unsatisfactory schools have far more capacity available. Newly opened schools that have not yet been inspected have the greatest proportion of places available.



Schools that have been operational in Dubai for longer periods have a higher capacity utilisation rate than those that have opened more recently. Established schools have a capacity utilisation rate of 92% while the similar rate for those schools that have opened over the past six years is 78%. Schools that have recently opened and been given a good quality rating by the Dubai Schools Inspection Bureau also have a relatively low capacity utilisation rate (79%), showing that spaces are available in good quality schools in Dubai.

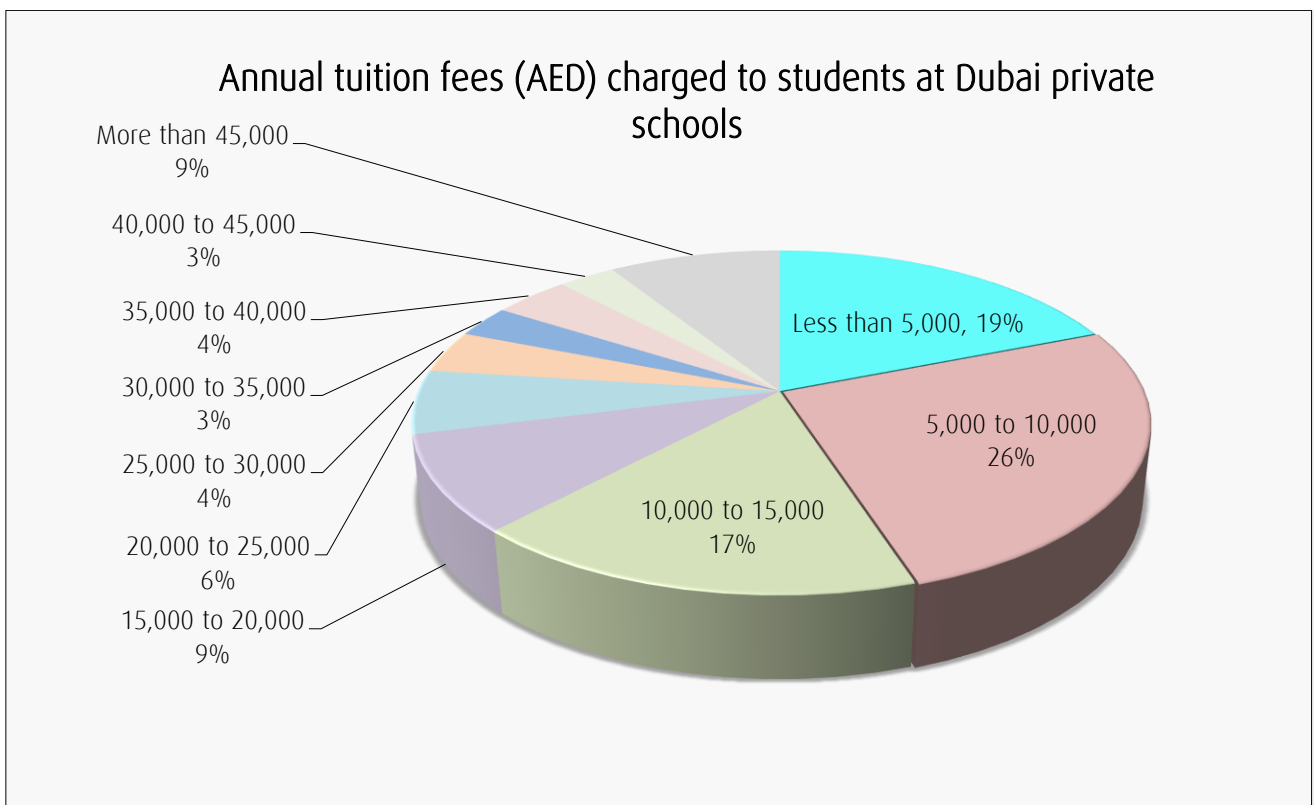


There is a higher capacity utilisation rate at UK and Indian curriculum schools (both 94%) than Private MoE schools (93%) and US curriculum schools (82%). There is also a higher capacity utilisation rate at schools that have an average tuition fee of less than AED10,000 (96.5%) compared to schools that charge higher fees.

## Tuition Fees at Private Schools

Fees for enrolling children at private schools in Dubai vary greatly. There are six tuition-free private schools and very low-fee private schools that charge AED1,725 per year. A Grade 12 student at the most expensive school can expect to pay the highest annual fee of AED96,140. These tuition fees cover day school facilities only and do not include boarding facilities, transport or uniform costs.

Nearly half (45%) of the students at private schools in Dubai pay less than AED10,000 per year in tuition fees, while some 16% pay more than AED35,000 dirhams. In most schools, tuition fees tend to increase by grade level. While 53% of KG1 students pay less than AED10,000 per year, just 34% of Dubai's Grade 12 students pay less than AED10,000 per year.



Excluding the few private schools that do not charge tuition fees, the average tuition fee paid by a student at a private school in Dubai is AED18,196 per year, an average increase of 6.0% from last academic year. The total possible annual gross revenue obtained by all private schools from tuition fees alone is AED4.1 billion. The actual figure would be slightly less than this due to some schools offering scholarships and fee discounts, such as those provided to children of staff members at the school.

The total revenue has increased by 16.3% from last year, due to a combination of the rise in student enrolments and increases in tuition fee rates at many private schools.

## Appendix

Students in Private Schools by Grade Level			
Grade/Year	Male	Female	Total
KG1	10,691	10,010	20,701
KG2	11,773	10,850	22,623
1	11,415	10,145	21,560
2	10,295	9,559	19,854
3	9,697	8,927	18,624
4	9,270	8,470	17,740
5	8,707	7,949	16,656
6	8,140	7,292	15,432
7	7,471	6,794	14,265
8	6,815	6,268	13,083
9	6,613	5,947	12,560
10	6,379	5,635	12,014
11	5,324	4,884	10,208
12	4,546	4,176	8,722
13	571	486	1,057
<b>Total</b>	<b>117,707</b>	<b>107,392</b>	<b>225,099</b>

Emirati Students in Private Schools by Grade Level			
Grade/Year	Male	Female	Total
KG1	1,560	1,478	3,038
KG2	1,691	1,500	3,191
1	1,465	1,156	2,621
2	1,363	1,098	2,461
3	1,298	1,037	2,335
4	1,220	1,051	2,271
5	1,213	970	2,183
6	1,058	796	1,854
7	976	812	1,788
8	910	712	1,622
9	1,065	707	1,772
10	1,091	659	1,750
11	983	628	1,611
12	945	583	1,528
13	16	3	19
<b>Total</b>	<b>16,854</b>	<b>13,190</b>	<b>30,044</b>

## Further Information

More information about Dubai's private schools can be found on the KHDA website at <http://www.khda.gov.ae>.

If you would like any additional information about private schools in Dubai please email [info@khda.gov.ae](mailto:info@khda.gov.ae) with your request, detailing the type of information you require and its purpose.