



Private Schools Landscape in Dubai

2011 / 2012



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P. O. Box: 500008, Dubai, United Arab Emirates

Tel: +971 4 364 0000

Fax: +971 4 364 0001

www.khda.gov.ae

Foreword

KHDA was established just five years ago, and in that time we have managed to gather vital information and data on the private education sector in Dubai; namely the schools, students and staff. This information now forms the evidence base that dictates our policies and direction to advance schooling for students in Dubai.

Since KHDA started overseeing the private education sector in 2007, 24 new schools have opened, providing capacity for 39,000 students. Demonstrating its resilience, the sector continued to grow throughout the economic downturn, increasing year on year to total more than 210,000 students today. In this academic year alone, schools registered a 7.4% growth in enrolment compared to 2010/11.

Likewise, the number of Emirati students has also undergone significant growth. More than half of Emirati students in Dubai attend private schools, making up 14.4% of the student population. The private education sector employs more than 13,000 teachers, a figure set to grow in line with the increase in student numbers.

Dubai's private school sector has underpinned the growth of its economy. The skilled expatriate community which has developed the trade, transport, tourism, finance and construction sectors has relied on Dubai's schools to educate its children. The availability of high quality education has been instrumental in helping Dubai achieve its strategic goals.

This landscape report has been produced with the assistance of all private schools in Dubai and I would like to thank them for their cooperation. Reports such as this promote transparency of information across the sector, helping school owners with investment decisions, schools with their recruitment strategies, and parents in choosing a school that best suits their child.

Dr Abdulla Al Karam

Chairman of the Board of Directors - Director General
Knowledge & Human Development Authority

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Key Data

Number of private schools in Dubai = **148**

Number of students in private schools in Dubai = **207,118**

Proportion of all Dubai students attending private schools = **88%**

Growth of the private school student population since the previous academic year = **7.1%**

Number of curricula on offer in Dubai's private schools = **13**

Average number of students in a class in Dubai's private schools = **25**

Average tuition fee paid by a private school student in Dubai = **AED 17,172**

Total gross revenue in tuition fees able to be collected by private schools in Dubai = **AED 3.52 billion**

Number of Emirati students in private schools in Dubai = **29,752**

Proportion of Emirati students attending private schools in Dubai = **56.1%**

Number of teachers in private schools in Dubai = **13,180**

Student to teacher ratio in private schools in Dubai = **16:1**

Proportion of students in private schools in Dubai that live in other emirates = **14%**

Introduction

With 88% of its students enrolled in private schools, Dubai's private school system is unique. Private schools provide kindergarten, primary, middle and secondary education to the large population of expatriate children that have come to Dubai from around the world. Private schools also cater to the majority 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 needs to provide sufficient quality to meet the demands of its expatriate population and encourage them to settle and educate their families in Dubai. Results from school inspections show that the standard of education in private schools is improving. Strong growth of student enrolments, together with a consistent preference for private schools amongst Emirati parents, are encouraging signs of the quality of Dubai's private schools.

This report provides a snapshot into the state of Dubai's private school landscape in the 2011/12 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.

With the assistance of the Dubai Statistics Centre, the data tabled in this report were collected from each private school in Dubai and compared with similar data from previous years. Data were collected in aggregated tables from schools. Separate tables were used to collect data on the numbers of students and classes at each grade level in each school, the numbers and qualifications of teachers and administrative staff, and various other aspects associated with school life. In the future, student-level data is intended to be used to provide a more detailed snapshot of the landscape of private schools in Dubai.

Private Schools in Dubai

Private schools¹ 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 2011/12 academic year, there were 148 private schools operating in Dubai, the same number as in the previous academic year. There are 13 different curricula on offer in Dubai's private schools. Schools following curricula from the UK, US, India and the UAE Ministry of Education cater to 90% of the private school student population.

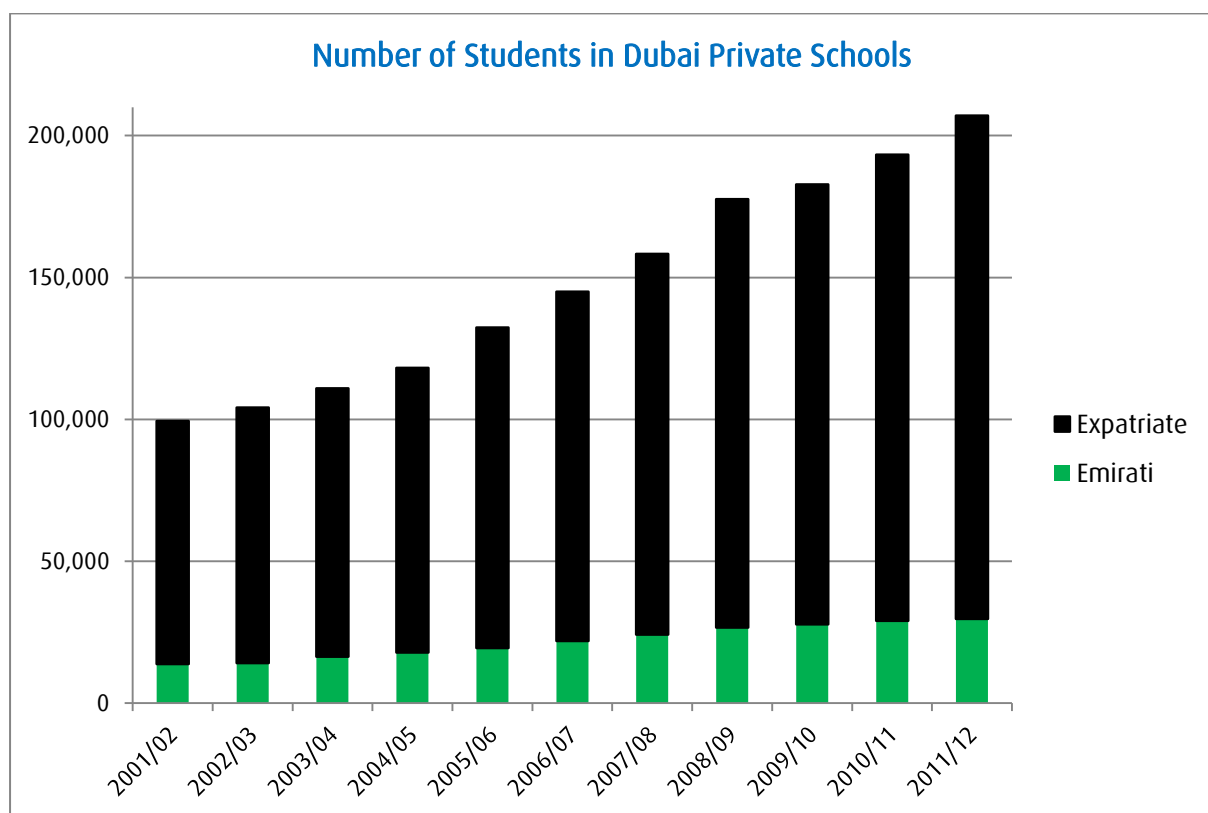
Private schools can operate on a for-profit or not-for-profit basis. A total of 32 of the 148 private schools operate on a not-for-profit or non-commercial basis and 18% of the private school student population attend these schools. GEMS Education is the private school operator in Dubai with the most number of schools. Its 19 schools have 24% of Dubai's total private school student enrolments.

¹ 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 and pre-kindergarten classes at schools are also excluded from this report.

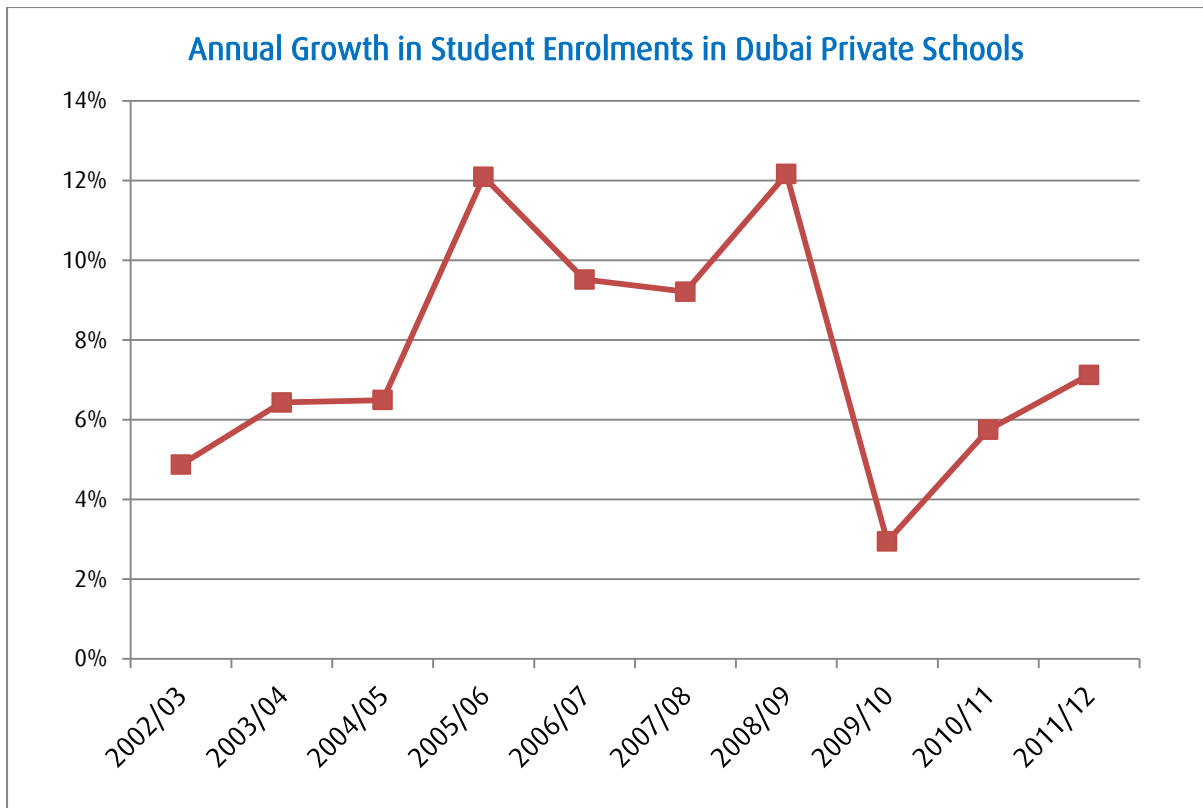
Students in Dubai's private schools

The number of students in a private school in Dubai ranges from less than 20 to many thousands of students in some of the larger Indian curriculum schools. Exactly half the schools have more than 1000 students. The average school student population is approximately 1400 students.

Private schools in Dubai have experienced solid growth in student enrolment over the past decade. The reasons include growth of the existing resident population, the influx of families into Dubai, students in other emirates attending Dubai schools, and an increased proportion of Emirati students choosing private education.



The number of students in Dubai's private schools has doubled over the past ten years with each year experiencing higher numbers than the previous year. In the 2011/12 academic year 207,118 students were enrolled in private schools in Dubai. The 2011/12 year is the first time that the number of students in private schools has exceeded 200,000 and has occurred in the same year that the population of Dubai overtook the two million mark. There are more male than female students in private schools; 52.4% of all student enrolments are boys.

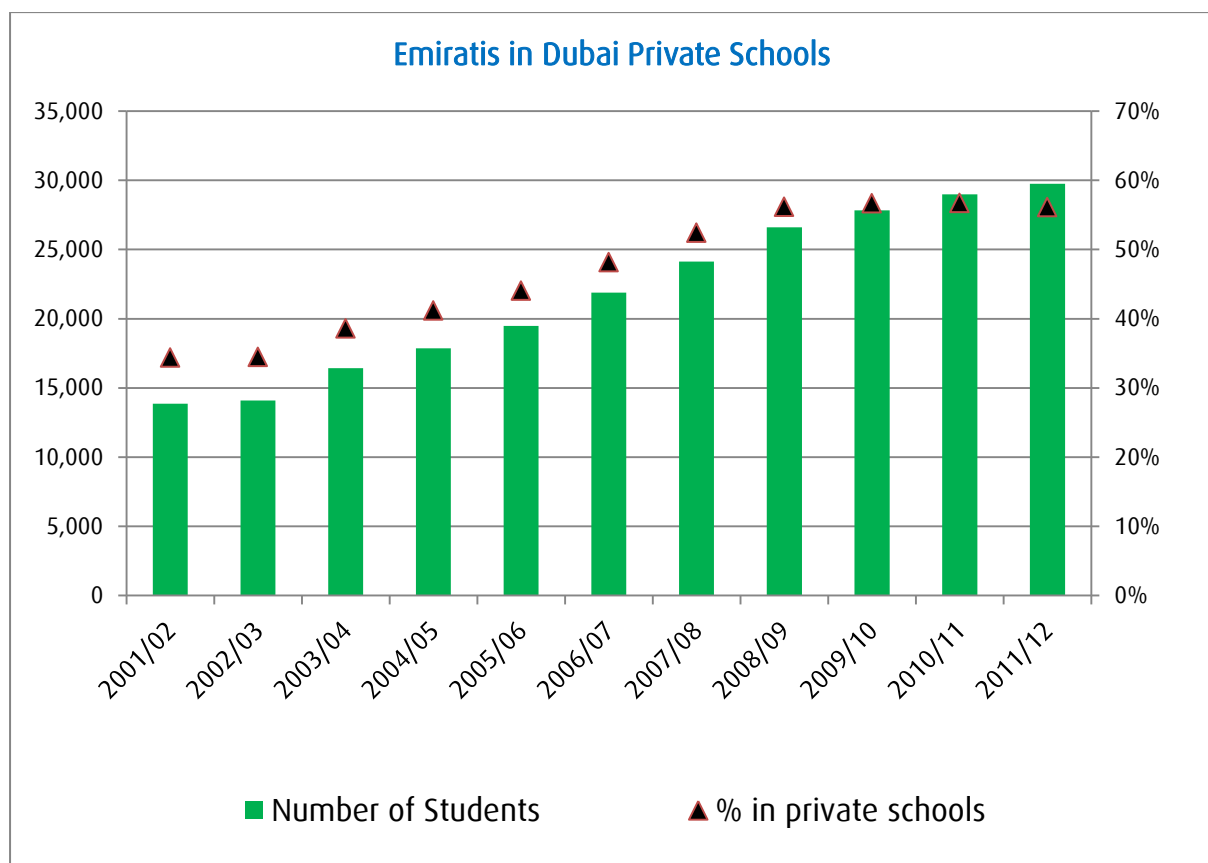


Private schools in Dubai have recorded growth in student enrolment each year for the past ten years. Growth rates have fluctuated between 3.1% and 12.2%. Student enrolments in 2011/12 are 7.1% higher than the previous academic year.

Emirati students in Dubai's private schools

A proportion of the growth rate in student numbers in Dubai's private schools is driven by increasing numbers of Emirati students. The number of Emirati students enrolled in private schools has increased year on year since 2001. In 2011/12, there were 29,752 Emirati students enrolled in private schools, a 2.7% increase from 2010/11. Emirati students make up 14.4% of the total student population in Dubai's private schools.

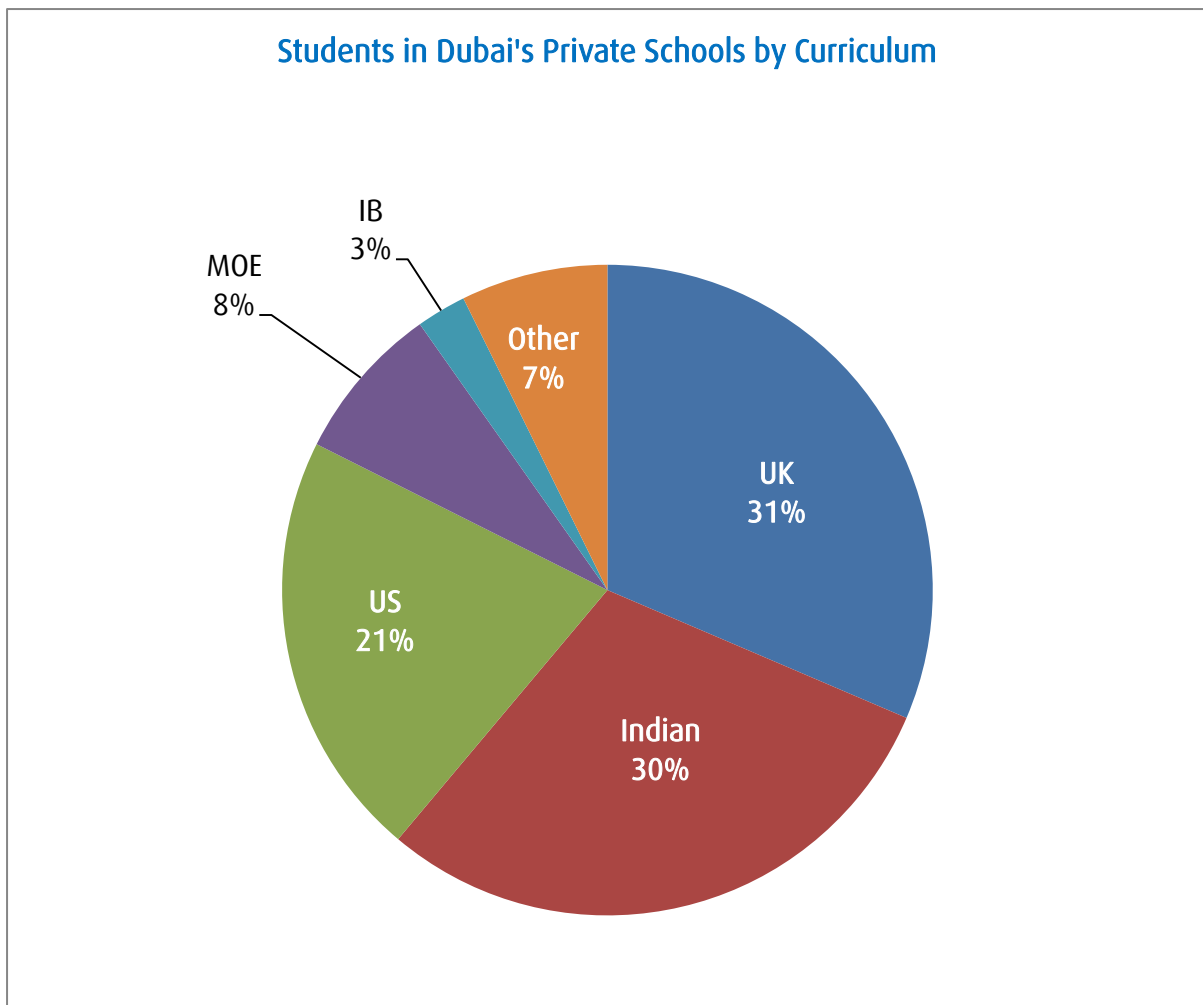
The number of Emirati students in private schools has more than doubled over the past ten years. This has stemmed from an increase in the number of school-age Emirati children plus a growing trend for Emiratis to prefer private schools over public schools. More than half of Emirati students currently attend private schools. Over the past ten years, this proportion has grown from 34% to 56%. The trend towards private school preference has stabilised in the past four 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.

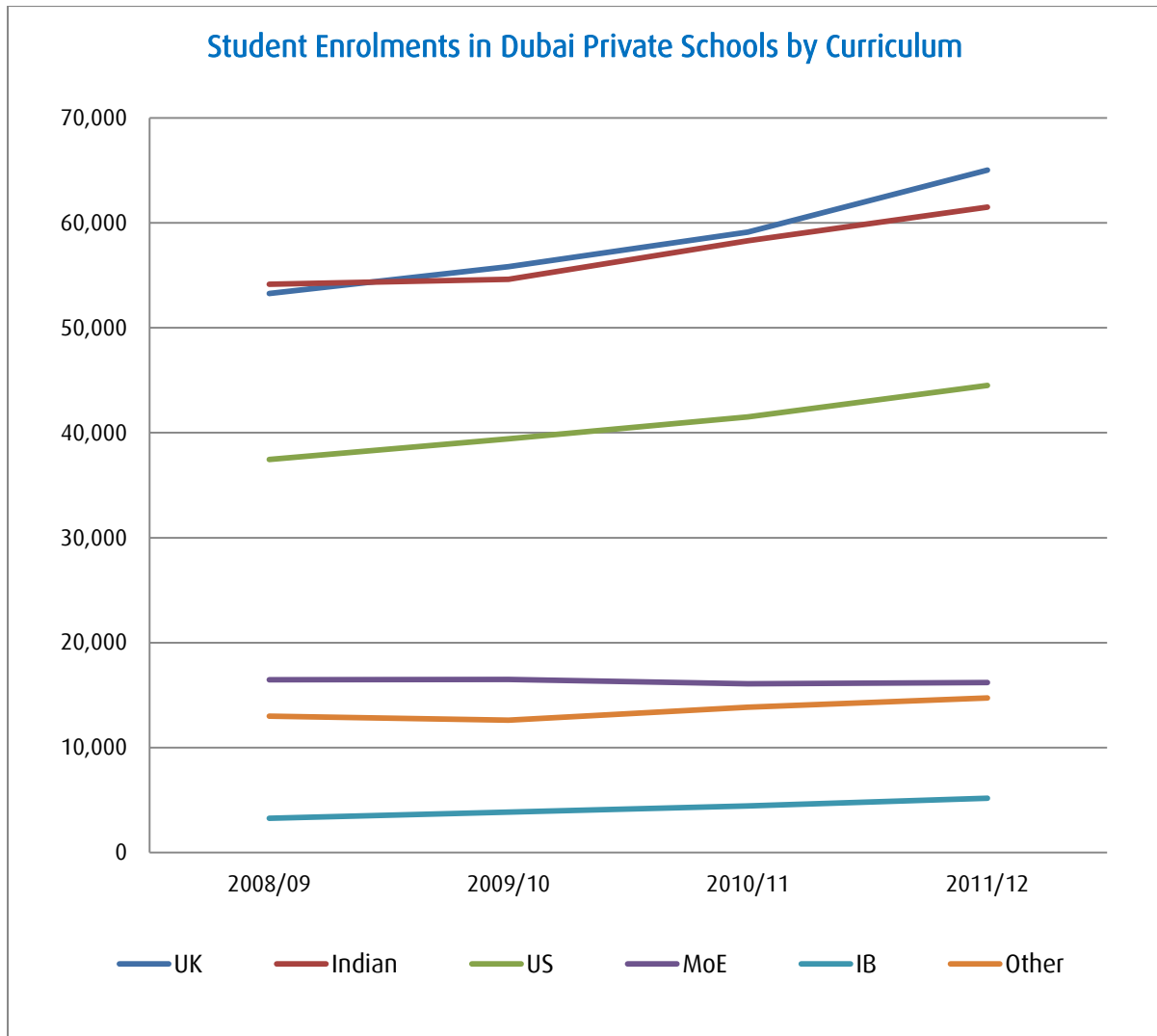
Number of students by curriculum

Private schools in Dubai offer 13 different curricula². The UK, US, Indian and UAE Ministry of Education curricula are taught to 90% of Dubai's private school students. The number of students at UK curriculum schools is the highest with 65,093 students or 31.4% of all private school enrolments.



² It should be noted that the categorisation of schools into certain curriculum groupings is problematic. For example, not all schools that follow a UK curriculum base the syllabus for each subject on the English National Curriculum programmes of study. Some also do not employ an assessment structure that is based on attainment targets to evaluate students' progress as required by the English National Curriculum. Similarly, only some US curriculum schools ensure that students gain appropriate qualifications to enable them to enter universities in the US and elsewhere while many US schools do not provide an accredited diploma to enable students them to achieve higher education placements. In addition, some UK and US curriculum schools also offer the IB Diploma Programme to students in senior years. For the purposes of this landscape report, we have identified each school with the type of curriculum provided to the majority of students at the school.

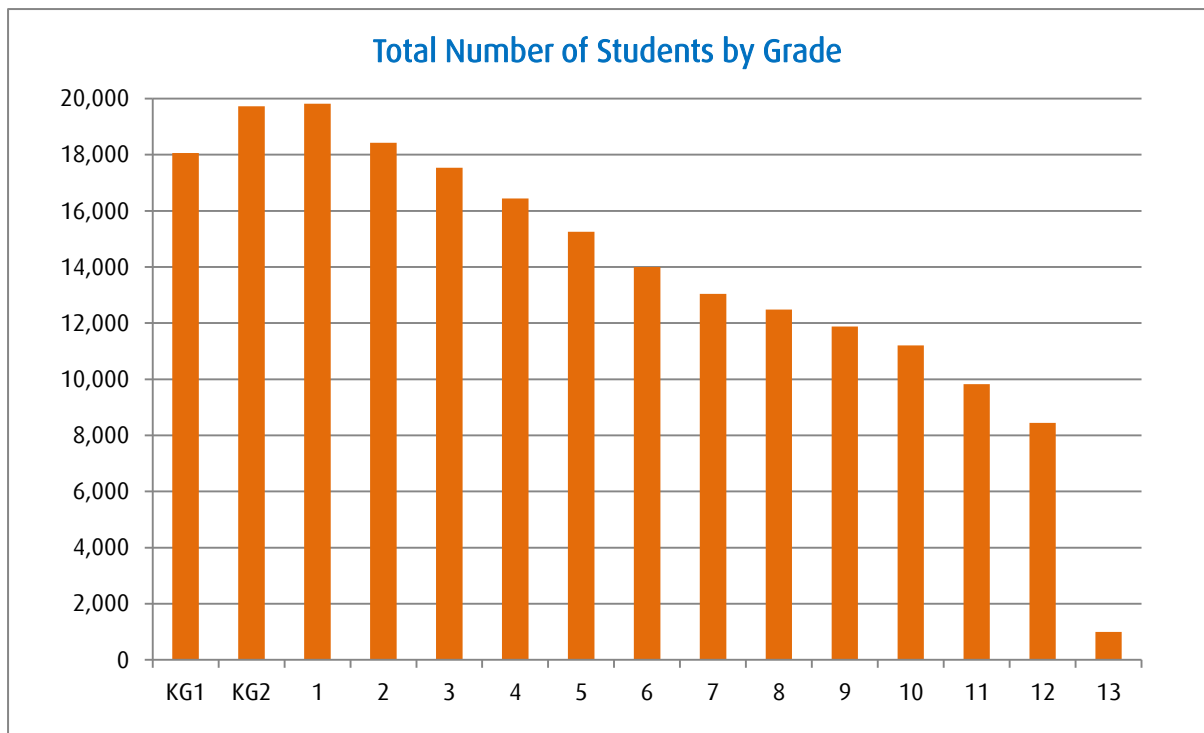
The growth pattern of student enrolment at schools differs according to the curriculum. Not only do schools that follow the UK curriculum have the highest number of student enrolments, but these schools are also experiencing stronger growth than others.



Since 2008/09, student enrolment at UK curriculum schools has increased by 22% compared with 19% at US curriculum schools and 14% at Indian curriculum schools. It has decreased by 2% at private schools following the UAE Ministry of Education curriculum.

Number of students by grade level

Dubai's private school student population has many more in junior grades than senior grades.³ This is due to many factors, the most important ones being growth in the general population and some families leaving Dubai when their children get older. Overall, there are approximately twice as many students in Grade 1 than in Grade 11.

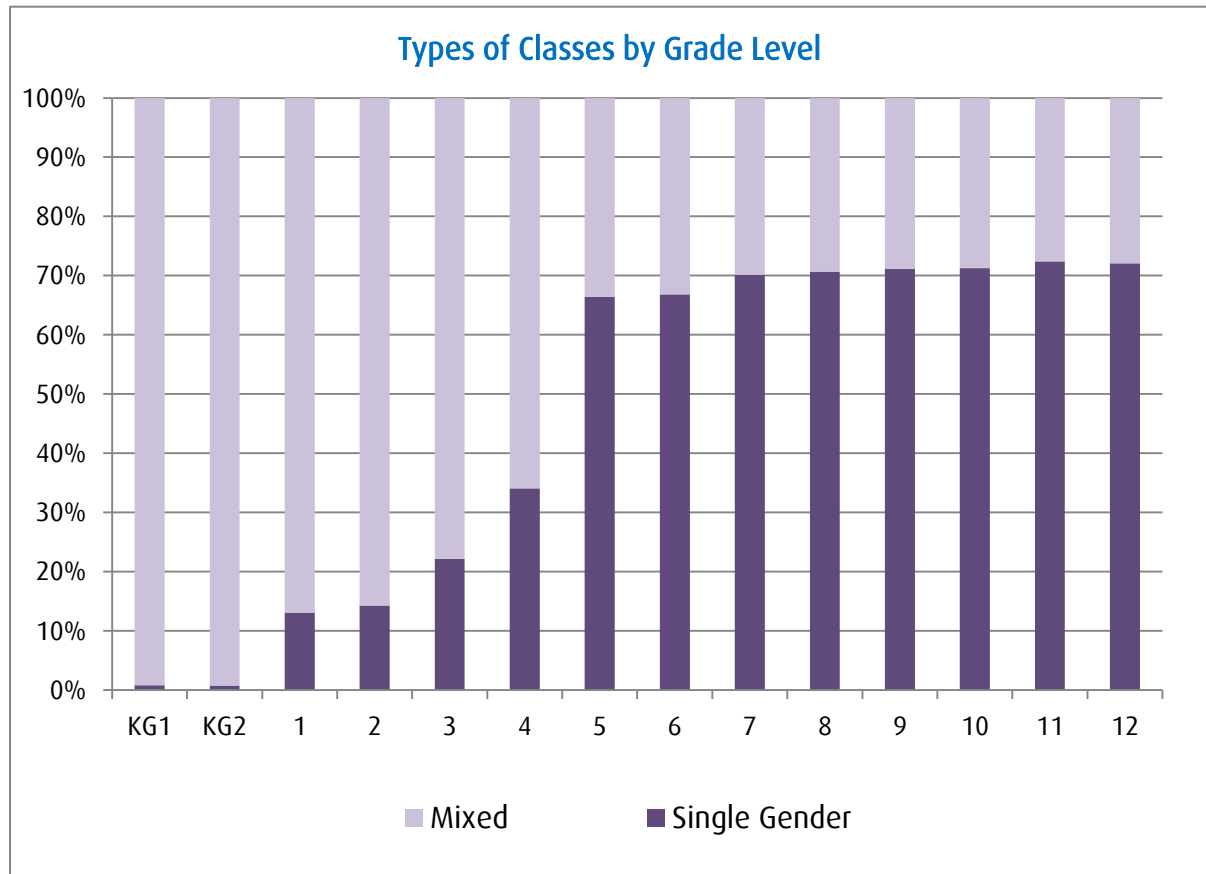


While the above chart appears to show a considerable decline in student numbers as they progress from one grade to the next, cohort analysis from multiple years of data reveals that this is not the case. The chart shows the figures for the 2011/12 academic year only. Detailed analysis shows that similar numbers of students are enrolled from one year to the next as a particular cohort of students progresses to the next grade level. For example, we expect that the number of students in Grade 2 next year will be similar to the number of students in Grade 1 in this academic year.

³ Different school curricula have different starting ages for Kindergarten. In addition, different curricula may have 13 years of schooling before graduation like the UK curriculum or 12 years of schooling like the US or Indian curricula.

Number of classes

There are 8,376 classes in private schools in Dubai. These classes comprise both mixed and gender-segregated classes. At 59%, the majority of classes in Dubai's private schools are mixed, while 22% are boys only and 19% are girls only. Less than 1% of Kindergarten classes in Dubai are gender-segregated. By Grade 5, two-thirds of classes in Dubai's private schools are single-gender and this proportion increases to 72% in Grade 12.



The average number of students in a class in Dubai's private schools is 25. There is a slightly higher student to class ratio in lower grades than in more senior grades. On average, there are 27 students per class in Grades 1 through 4, with this ratio decreasing gradually to 19 students in each class in Grade 12.

Indian curriculum schools have the highest number of students per class with an average of 30 students per class. In comparison, private UAE Ministry of Education schools have 26 students per class, UK curriculum schools have 23 students per class and US and IB curriculum schools have an average of 22 students per class.

Tuition fees at private schools

Fees for enrolling children at private schools in Dubai vary greatly. There are six tuition-free private schools, very low-fee private schools that charge AED1800 per year to the highest annual fee of AED 92,000 per year for a Grade 12 student at the most expensive school. These tuition fees cover day school facilities only and do not include boarding facilities, transport or uniform costs.

Proportion of students at private schools paying tuition fees in a particular range		
Annual Cost (AED)	Number of students	Percentage
Less than 5,000	42,393	20%
5,000 to 10,000	56,630	27%
10,000 to 15,000	30,620	15%
15,000 to 20,000	20,719	10%
20,000 to 25,000	10,937	5%
25,000 to 30,000	7,013	3%
30,000 to 35,000	7,699	4%
35,000 to 40,000	8,916	4%
40,000 to 45,000	5,485	3%
More than 45,000	16,706	8%

Nearly half (48%) of the students at private schools in Dubai pay less than AED10,000 per year in tuition fees, while about 15% pay more than AED35,000 dirhams. In most schools, tuition fees tend to increase by grade level. While 55% of KG1 students pay less than AED10,000 per year, just 35% of Dubai's Grade 12 students pay less than AED10,000 per year.

Fees vary considerably between the curricula being offered by private schools. All private schools that follow the UAE Ministry of Education, Iranian, Pakistani or Philippine curricula charge an average tuition fee of less than AED15,000 per year. Conversely, no IB school has an average fee of less than AED29,000 per year.

Half the students in UK curriculum schools pay more than AED15,000 per year for tuition. In US curriculum schools, 65% pay more than AED15,000. By way of comparison, just 10% of Indian-curriculum school students are charged more than AED15,000 per year while this proportion decreases to 2% for students enrolled in a UAE Ministry of Education curriculum private school.

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 AED17,172 per year. The total possible annual gross revenue obtained by all private schools from tuition fees is AED3.52 billion. The actual figure would be slightly less than this due to many schools offering scholarships and fee rebates, such as those provided to children of staff members at the school.

The total revenue has increased by 12% from last year due to a combination of a 7% rise in student enrolment and an average 4.5% increase in tuition fees. While there has been a freeze on school fees increases, the average has nevertheless risen due to the movement of students to new and existing schools that charge higher fees, a higher proportion of students in higher grades (which tend to attract higher fees), and an increase in tuition fees at a small minority of schools.

Teachers in private schools

In the 2011/12 academic year, private schools reported a total of 13,180 teachers. This is an increase of 7.6% from the previous year, and is in line with the 7.1% increase in student enrolment. Similar to last year, 80% of teachers are female and 20% male. There are relatively more male teachers in senior classes and relatively few in Kindergarten classes. There are very few female Emirati teachers in private schools and no male Emirati teachers.

The average student to teacher ratio in Dubai's private schools is 16:1, which varies across the different curricula. Schools following an Indian curriculum have a student to teacher ratio of 21:1, private UAE Ministry of Education schools 18:1, while UK and US curriculum schools have an average ratio of 14:1.

Most teachers (90%) have a university degree. The remainder have their highest educational attainment as either a secondary school certificate, an intermediate qualification or a qualification from a teacher training college.

About 14% of private school students travel from other emirates to go to school in Dubai. Overall, 3,629 private school teachers (28%) live in another emirate, nearly all of them in Sharjah.

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 to know any additional information about private schools in Dubai, please email info@khda.gov.ae with your request detailing the type of information you require and its purpose.

Appendix – Data Tables

Private School Students by Type of Curriculum		
Type of School	Schools	Total Students
UK	54	65,093
Indian	23	61,498
US	32	44,078
Private MoE	14	16,197
IB	6	5,134
Pakistani	3	3,685
French	4	3,381
Philippine	2	3,281
Iranian	6	2,826
Institute of Applied Technology	1	893
Russian	1	466
German	1	439
Japanese	1	147
Total	148	207,118

Students in Private Schools by Grade Level					
Grade/Year	Emirati		Expatriate		Total
	Male	Female	Male	Female	
KG1	1,528	1,358	7,815	7,356	18,057
KG2	1,664	1,387	8,702	7,973	19,726
1	1,523	1,231	8,713	8,347	19,814
2	1,409	1,112	8,211	7,688	18,420
3	1,279	1,081	7,873	7,302	17,535
4	1,260	1,006	7,340	6,839	16,445
5	1,107	853	6,942	6,356	15,258
6	1,014	840	6,296	5,854	14,004
7	952	732	5,867	5,486	13,037
8	918	717	5,533	5,315	12,483
9	1,127	675	5,238	4,837	11,877
10	1,099	651	4,796	4,659	11,205
11	1,028	608	4,171	4,011	9,818
12	981	590	3,513	3,357	8,441
13	15	7	524	452	998
Total	16,904	12,848	91,534	85,832	207,118

Teachers in Private Schools					
Phase	Emirati		Expatriate		Total
	Male	Female	Male	Female	
Kindergarten	0	17	11	1,933	1,961
Cycle 1 / Primary	0	7	626	4,485	5,118
Cycle 2 / Middle	0	3	1074	2,497	3,574
High/ Secondary	0	4	972	1,551	2,527
Total	0	31	2,683	10,466	13,280

Related Publication

<p>Private School Inspection Results 2011-2012</p>	<p>In search of good education: Why Emirati parents choose private schools in Dubai</p>
	
<p>Parental Involvement in the Education of their Children in Dubai</p>	<p>Private schools in Dubai: The Evolving Government and Private Sector Relationship</p>
	
<p>Statistics for Private Schools in Dubai 2010/2011</p>	<p>The Higher Education Landscape in Dubai 2011</p>
	

CONTACT US

P. O. Box: 500008, Dubai

United Arab Emirates

Tel: +971 4 364 0000

Fax: +971 4 364 0001

www.khda.gov.ae