



## EXECUTIVE SUMMARY

Over the last three decades, continued expatriate population growth across the United Arab Emirates (UAE) and Qatar has created an unprecedented demand for private education. However, a combination of a lack of affordable private education options, monopolistic behaviors of private education providers, and a mix of government regulations have resulted in serious issues surrounding access and quality. This policy paper presents the nature and implications of private school provision for access and equity in K-12 education in the UAE and Qatar. We find that, across the populations of these countries, there are considerable socioeconomic differences that determine who has access to private schooling. As a result of increasing growth in the for-profit private education sector in both countries, poorer families are ultimately left less able to access quality education than are their wealthier counterparts. The potential of non-profit schools to create greater equity and accessibility is discussed, and recommendations for policymakers are offered.

## Who Benefits from Private Education in the UAE and Qatar?

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PERI Grant Number: OR201-08895

### Introduction

The expansion of public education in the Gulf Cooperation Council (GCC) region began with the discovery of oil in the 1950s.<sup>1</sup> At this time, there was rapid economic and social development across the region that necessitated the employment of large numbers of expatriate workers. Many of these workers brought their families and children with them to the GCC. Reflecting the educational needs of these expatriate families, there was a demand for private schools to offer a variety of international curricula—including curricula from the United Kingdom (UK), the United States (US), India, and other places<sup>2</sup>—in addition to the Arabic-medium curriculum taught in public schools. Thus, the private education sector began to out-grow the public education sector as, from the 1970s onwards, the number of expatriates in the Gulf countries began to rise significantly<sup>3</sup> (Alpen Capital, 2012). In 1975, only 10% of the Gulf population was foreign, but, by 2011, that figure had more than quadrupled to 43%, with expatriates accounting for as much as 80% of the populations of countries like the UAE and Qatar (Fargues & Shah, 2011).

In the Gulf, the dominance of the private education market and the presence of its for-profit providers raises questions about educational access and equity, particularly for middle- and low-income expatriate families who do not have access to public schooling.<sup>4</sup> This policy paper presents findings from a recent study conducted in the UAE and Qatar that examines these issues and explores how they impact families, educators, and their societies overall. It concludes with a discussion of how the current situation may affect access to and quality of private education in both countries. Relevant policy recommendations are also provided.

<sup>1</sup> Established in 1981, the GCC is a regional, inter-governmental political and economic union that consists of Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the United Arab Emirates.

<sup>2</sup> KHDA (The Knowledge and Human Development Authority), which regulates private schools in Dubai, lists 20 curriculum choices available in its emirate alone (KHDA, 2015).

<sup>3</sup> The percentage of expatriates in the GCC countries varies from 28% to more than 80% and typically consists of a combination of primarily Southeast and East Asians, Arabs, and Westerners. The majority of the Asian population performs low-skilled jobs, while Arabs and Westerners are employed in positions requiring higher skill sets.

<sup>4</sup> Expatriate children are unable to access the public education systems in the UAE and Qatar due to language barriers and public school limitations for seats filled by non-nationals. Preference for expatriate student enrollment in public schools is often given to Arabic-speaking expatriate children whose parents work in the governments.

## Global Trends in Private Education

In 2012, global education expenditure was over 4.4 trillion USD. That number is estimated to grow by 7.4% by 2017 (IBIS Capital, 2013), making education a lucrative market in which private education companies are eager to invest. Governments, international organizations, and other global educational institutions have influenced the popularity of private schooling, which comes in the form of community, faith-based, entrepreneurial, corporately-financed, or philanthropic schools (Lewin, 2014). On a global level, international organizations such as the World Bank and the Organization for Economic Cooperation and Development (OECD), foundations such as the Bill and Melinda Gates Foundation, and universities like Harvard University are increasingly advocating for the further expansion of the private sector in education (Robertson & Verger, 2012).

This expansion is evidenced across both the Western world—including Scandinavia, the United Kingdom (UK), and the United States (US)—and the non-Western world. In Sweden, for example, private school enrollments grew from less than one percent of the total in 1994 to over 10% in 2008 (The Swedish Model, 2008). Similarly, in the US there has been a steady increase in the establishment of charter schools, which are public schools operated by a range of new actors, which include private companies known as educational management organizations (EMOs), parents, administrators, and others. Charter schools have grown from less than 2% of public schools in 2000 to over 6% in 2013 (Jennings, 2013; National Alliance for Public Charter Schools, 2014). This trend extends to areas in the developing world such as Chile, Colombia, India, and parts of Africa (Belfield & Levin, 2002). In the Middle East, and the Gulf region specifically, there has been a significant expansion of private actor involvement in various capacities in the education sector. This has been due both to the high percentage of expatriates living in the region and to government efforts to encourage high quality private education alternatives in contrast to the public school systems, which are characterized by traditional teaching, curricula, and assessment methods as well as under-qualified or unqualified teachers (Alpen Capital, 2012; World Bank, 2008).

## Private Education in the UAE and Qatar

The 1960s and 1970s saw a rapid expansion of Gulf economies as oil money flowed and countries embarked on ambitious development programs. These programs required large numbers of expatriate workers, and this was especially evident in the UAE and Qatar, where the population of expatriates rose to more than 80% of the total population.<sup>5</sup> Throughout this time, public education expanded for nationals while the private education sector grew to meet the increasing demand from expatriate students, whose population grew at a faster rate than did the population of local students.

In recent decades, the UAE and Qatar have made significant strides in the range and quality of their private schooling options, providing a variety of for-profit and non-profit schools, different types of curricula (UK, US, Arabic Ministry of Education, French, etc.), facilities, extracurricular activities, and more. Over the years, private schools have not only attracted expatriates but have also become the choice of many nationals from these two countries, ones who were either dissatisfied with the quality of government schools or who were looking for a different educational model.

During the 2013-2014 academic year in Qatar, approximately 48% of students were enrolled in private schools (The Peninsula, 2013), while in the same year in the UAE, the rate was 72% (MOE, 2014). In Dubai and Abu Dhabi alone, the private K-12 education sector is valued at 1.4 billion USD (27% of the GCC market), while Qatar's private education sector is expected to triple from 430 million USD (7% of the GCC market) in 2010 to as much as 1.5 billion USD in 2020 (Moujaes, Hoteit, & Hiltunen, 2011). The market for private education is expected to continue growing, as expatriate populations are expected to increase in the UAE and Qatar, and more nationals are expected to continue sending their children to private schools. In addition to expatriates' demand for private education, today, approximately 30% of Qataris and almost 35% of Emiratis are attending private schools (Edarabia, n.d.; Pennington, 2015). However, with this rising demand for private education comes serious challenges in terms of education access and affordability, and these will be discussed in the next section.

<sup>5</sup> Despite the expatriate population growth in both the UAE and Qatar, expatriates remain temporary workers holding fixed-term employment contracts (Lori, 2012). The expectation is that these populations will eventually be required to leave the countries in which they have worked.

## Access and Affordability of Private Education in the UAE and Qatar

While many people generalize Gulf residents as either well-paid professionals or poorly paid construction workers, the sheer scale of the expatriate workforce in the Gulf means there are expatriates of almost every nationality and wage level living in the region. Notwithstanding significant developments that the UAE and Qatar have achieved in the field of education over a short period of time, there are three key challenges that expatriate families have experienced in terms of educating their children. These are navigating national policies surrounding expatriate migration, gaining access to places in schools, and being able to afford private education.

The first challenge is that governments have enacted regulations that limit the number of foreign families allowed to reside in their countries based on the wage level of the expatriate worker. In the UAE, expatriate workers are allowed to obtain visas for their families if they earn a minimum monthly salary of 4,000 AED (approximately 1,089 USD). In Qatar, workers are permitted to bring their families with them if their monthly salary is at least 10,000 QAR (roughly 2,747 USD) (Kannan, 2014). Many of the lowest paid expatriate workers, such as construction laborers or domestic workers, do not earn the minimum monthly salaries and must therefore leave their families in their countries of origin if they choose to relocate to the UAE or Qatar for employment.

Gaining access to places in private schools is another challenge for expatriate families with children in the UAE or Qatar. These expatriates frequently struggle to find private school openings for their children due to a shortage of private school classroom space. In Abu Dhabi during the 2013–2014 academic year, there was an acute shortage of approximately 25,000 private school seats, which is expected to double by 2015–2016 (Issa, 2013). Similar shortages have been observed in low-fee private schools located in Dubai and Qatar, such as institutions that follow Indian and Bengali curricula (Ahmed, 2013; Dhal, 2013; Scott, 2014). It was estimated that the number of private schools in Qatar would need to expand by a compounded annual growth rate of 6% between 2011 and 2016 to accommodate the rising number of skilled expatriates who are working on the 2022 FIFA World Cup project and seeking enrollment for their children in private schools (Alpen Capital, 2012). Until additional schools open to address these shortages, many families are choosing to homeschool their children or are obliged to send them back to their home countries to be educated in the public systems there (Bakshi, 2014; Issa, 2013; KHDA, 2014).

Finally, for expatriate parents interested in securing a place for their children in high-quality private schools, the affordability of schooling is a significant challenge. A 2012 survey revealed that parental concern over affordable private education in the UAE and Qatar is widespread (HSBC, 2012). According to the report, “Expatriate parents in the UAE in particular see the cost of children’s education (86%) . . . [to be] more expensive when compared to the expatriate parents’ home country” (HSBC, 2012, p. 30). Tuition costs account for 30% and 35% of average household incomes in the UAE and Qatar, respectively. Given these challenges, it is crucial to understand how the private education system operates within these two countries and how policymakers can address its complexities (HSBC, 2012).

## The Study

This paper presents findings from a study on the private education sector in the UAE and Qatar. It utilized qualitative and quantitative comparative data to capture the perspectives of different stakeholders, including education providers, policymakers, government agencies, parents, and teachers. One-hundred-ninety parents and seventy-six teachers in private schools across the UAE and Qatar were surveyed regarding their perceptions of access and equity in their schools. We asked our respondents to evaluate whether the profit status of their schools (i.e. whether it was a for-profit or non-profit private school) impacted how issues of access and equity operated in those schools. Additionally, the researchers conducted interviews with five education regulation agencies, nine school principals, eight parents, and six teachers to gain a more thorough understanding of their perspectives on the above issues. Findings from the surveys and interviews are reported below and examine the concerns surrounding private education as experienced by parents, teachers, and principals.

## What Parents Say

Of the 190 parents surveyed, 125 were based in five emirates across the UAE (Ras Al Khaimah, Sharjah, Dubai, Abu Dhabi, and Fujairah), and 63 were based in Qatar (the remaining two respondents failed to report their locations). Over 65% of the parents were female, and the majority of them had completed either a bachelor’s degree or a master’s degree.

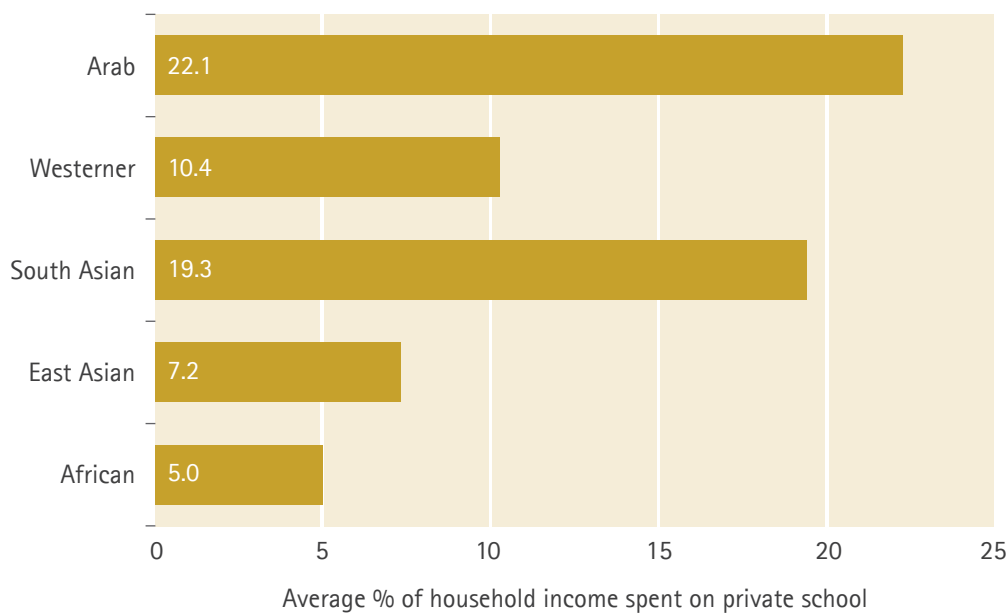
The surveys indicated striking differences in the total annual household earnings across nationality groups in the UAE and Qatar. Arab and Asian expatriate families earned, on average, 150,000–200,000 AED/QAR (40,839–54,451 USD) annually, compared to

Western expatriates, who earned a much higher 350,000–500,000 AED/QAR (95,290–136,129 USD). In addition to their higher salaries, Westerners were more likely to receive educational subsidies from their employers, whereby 64% of Westerners reported that at least 75% of their children's educational costs were covered by their employers or their spouses' employers. Only up to 40% of Arab and Asian families reported receiving the same benefit.

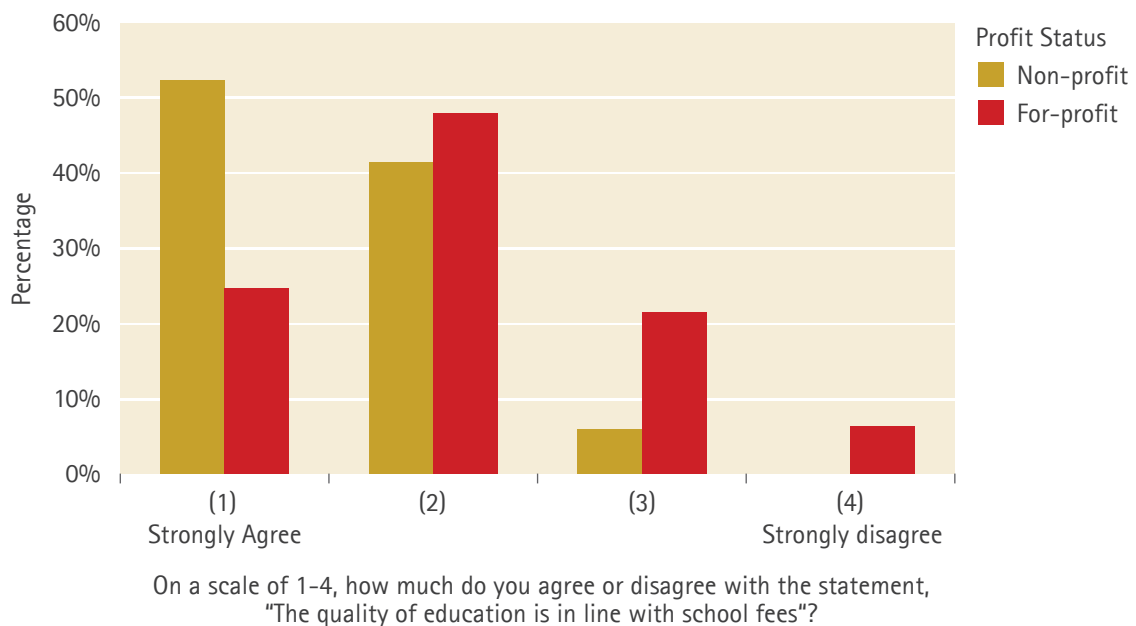
Private school costs were also found to impact nationality groups differently. Although Arab, South

Asian, and East Asian parents pay, on average, less per child than Westerners pay in school fees, they still spend a higher proportion of their total annual income—approximately 10% more—on private school fees due to their lower salaries. These percentages are expressed in Figure 1 below. Therefore, parents' responses indicate the inherent inequality in the private schooling system overall, wherein the costs of schooling are much higher for families from lower-income backgrounds than for families with higher incomes.

**Figure 1. Average Percentage of Annual Income Spent on Private School by Nationality Group**



**Figure 2. Quality of Education and Consistency with School Fees**



The parent survey results also revealed differences in how satisfied parents were with the status of the school (non-profit or for-profit) their children attended.<sup>6</sup> Parents whose children were enrolled at non-profit schools reported being happier than parents whose children attended for-profit institutions when they considered the value-for-money of their child's education, as illustrated in Figure 2 below.

In addition, most parents across both school types argued that they would like to see improvements in teacher quality, school facilities, and school choice. More specific concerns varied based on the nationality of the parents rather than on school status. For example, South Asians named education quality as a key area for improvement. They also stressed that schools should reduce their fees since affordability was a major concern. Westerners, however, identified the lack of other private school options as a greater concern because of limited spaces at high quality, relatively expensive private schools.

### What Teachers Say

Of the 76 surveyed private school teachers, 47 were based in the UAE, and 29 were teaching in Qatar. Over 70% of the sample consisted of female teachers. More than half of the teachers were Westerners, a third were South Asians, and the remainder consisted of Arabs and other nationalities. Approximately half of the surveyed teachers worked at British curriculum or International Baccalaureate (IB) schools. The rest of the teachers were employed at other types of schools, such as Ministry of Education, Indian, or American schools, which offered their own curricula.

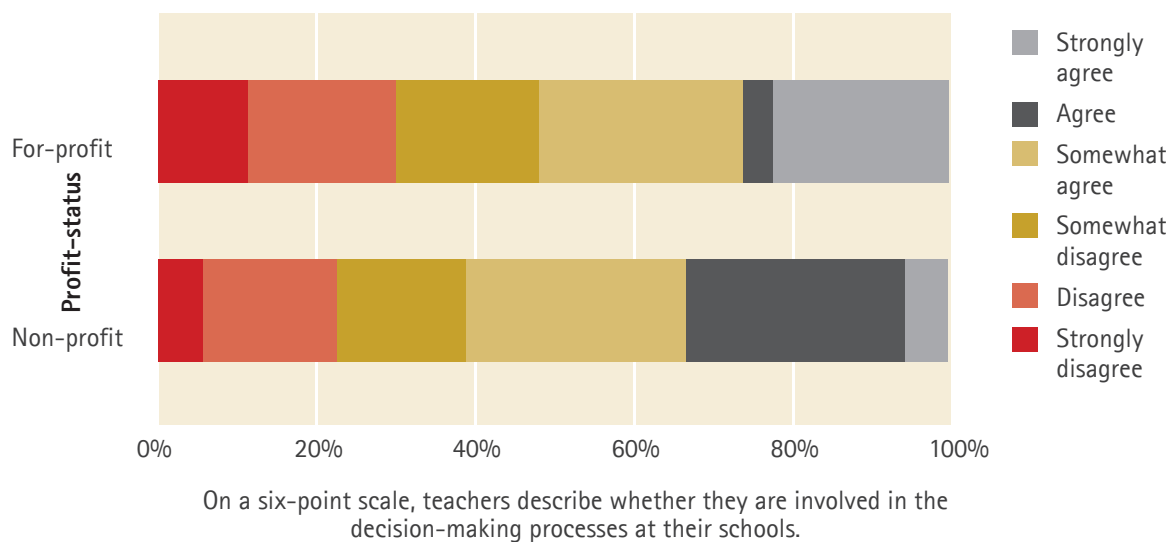
Of the surveyed teachers, 18 worked in non-profit schools, 27 worked in for-profit schools, and the remaining 31 stated

that they did not know the type of school in which they worked. Researchers collected data from teachers on their experiences, which included the grades and subjects they taught, their proximity to the school, number of students, average school-related workloads, salaries and benefits, and perceptions of school quality. For those who specified their school type, teacher experience was, on average, the same among non-profit and for-profit schools.

Teachers were also asked about their qualifications. Slightly more teachers (94%) in non-profit schools reported holding an official teaching certificate or license compared to teachers in for-profit schools (85%). Non-profit school teachers, on average, reported that their salaries were approximately 1.5 to 2 times higher than those of teachers in for-profit schools. They further noted receiving better work benefits and teaching a smaller number of students per class, which is a preference of most teachers. Despite these differences, over half of teachers in both non-profit and for-profit schools reported that their salaries adequately covered their living expenses. However, it is worth noting that approximately the same percentage (22%) of teachers in for-profit and non-profit schools engaged in income-supplementing activities—mainly private tutoring—outside of their day jobs as teachers.

All teachers expressed dissatisfaction with school quality. Approximately 25% did not agree that their schools were offering value for money. Additionally, around 60% responded negatively to the statement, "I wouldn't want to work in any other school." Nevertheless, teachers in non-profit schools reported having more autonomy and being more involved in decision-making processes at their schools than did their counterparts in for-profit schools, as illustrated in Figure 3.

**Figure 3. Teacher Influence in Private Schools**



<sup>6</sup> While the two school types may share some similarities, they differ on a fundamental level: the earnings from for-profit schools go to the owners and/or shareholders, whereas non-profit schools reinvest their profits into the schools.

When asked for their feedback, all teachers raised concerns about salaries, benefits, and their status<sup>7</sup> as teachers. Few teachers reported being satisfied with their school, its facilities, or their relationships with students and parents. For-profit school teachers specifically raised concerns revolving around a general lack of transparency, poor management, and a lack of support and investment allocated to initiatives that would improve school quality. For example, one teacher said:

"The profits of private schools are going to pay investors their yields. Yes, investing in schools is big business in the GCC[,] as multiple studies and consulting groups have indicated. However, there is a tremendous problem when very few profits are going back into the school to support teachers, enhance facilities, provide professional development, hire additional staff, and expand much needed [sic] resources. Unfortunately, the majority of profits are going to investors and school owners."

## What Principals Say

In addition to the surveys completed by parents and teachers, interviews were conducted with 11 school principals across for-profit and non-profit private schools in the UAE and Qatar. The primary themes that emerged are reported in Table 1. In general, it was found that non-profit schools generally value the provision of quality education that allows students to explore academic and non-academic interests and to give back to society. In contrast, for-profit schools were guided more by fees and the ability of schools to adhere to requirements of the schools' management and of the local regulatory bodies.

## Putting It All Together

The UAE and Qatar are unique cases that offer a glimpse into what a completely privatized education sector might look like. These two countries demonstrate the free market forces at work and feature open labor markets, wherein employers are free to remunerate employees based on their nationalities rather than on their

**Table 1. Differences Across For-profit/Non-profit Private Schools**

Theme	For-Profit	Non-Profit
Curriculum	Less standardized	Standard curriculum based on UAE/ Qatar ministry regulations
Governance	Difficult to meet regulatory bodies' demands; oversight process seen as stressful and inconsistent; influenced by other systems, such as a boards of governors	See regulating bodies' oversight as helpful and necessary
Long-term plans	Focus on institution's survival, which is contingent on facilities and resources granted by ministry	Focus on expansion, such as improving facilities and administrative processes
Teachers	Poor teacher training; difficulty finding qualified teachers; tendency to employ teachers of same nationality as students	Tend to hire qualified teachers and teaching assistants
Fees and costs	(i) Lower socioeconomic status (SES) families; more internal scholarship programs available for gifted students; more parental complaints raised about school fees (ii) Greater need to raise fees, but schools abide by MOE limits on increases (iii) Charge nominal fees for materials, transportation, etc.	(i) Higher SES families; higher proportion of fees paid by parents' companies (ii) Tuition generally inclusive of additional costs
Perceived role	Take pride in prioritizing the general well-being of students and providing access to basic education	See schools as important part of society and contribute to best practices and to raise standards in education for the region

<sup>7</sup> This is their perceived status as teachers in the eyes of others in the education community or when regionally compared to other professions.

credentials. As a result, schools are primarily segregated along socioeconomic lines that reflect the status of their students. Sunny Varkey, founder and Managing Director of GEMS Education (the largest provider of for-profit, private K-12 education in the world), describes Dubai's private education sector, stating,

"Dubai is a place where, depending on your financial resources, you can choose a school model. If you want to choose a school that is \$10,000, you have it. If you want to send your children to a school that is \$3,000, you have it . . . You must choose a school that you can afford." (Buller, 2013, p.1)

Varkey's view indicates that parents in the UAE and Qatar should expect an educational experience commensurate with the amount they pay for their children's education. Wealthy families can send their children to schools with ample resources, where teachers are paid competitive salaries and management staff are recruited from top universities in the West. At best, poorer families have to send their children to lower quality schools, which likely have fewer resources and teachers and whose management are paid less than are their peers who work at schools with higher tuition rates. At worst, poorer families cannot afford to send their children to private school in the UAE or Qatar and must either homeschool them or send them back to attend schools in their home countries. According to a recent newspaper report, over 20,000 Pakistani children from low-income families are currently in the UAE but are not attending school (Ahmad & Nazzal, 2014). At present, researchers do not have similar data for other nationalities, though it is likely that these figures would resemble those of children of other nationalities who are from low-income families. Therefore, this study found that inequality persists between higher and lower socioeconomic groups, which negatively affects both families and education staff in the UAE and Qatar's private schools.

In addition to these socioeconomic challenges, this study found that for-profit schools differed from non-profit schools in that they prioritized achieving financial returns—that is, profit—over leveraging education as a tool that can develop individuals and society as a whole. These schools also seemed uninterested in fostering any link or loyalty to the country in which they operated.

In contrast, non-profit schools demonstrated a sense of obligation to their communities and to the

development of individual students, whom those schools viewed as people who would invest in society in the long run. Therefore, non-profit schools also may offer communities access to more equitable and culturally connected schools. These types of schools benefit stakeholders at both individual and societal levels because they are more grounded in a philosophy of community service (Biggs, 2014). However, there are few affordable non-profit options available for families in the UAE and Qatar, especially for those at the lower end of the socioeconomic spectrum.<sup>8</sup>

Our research, therefore, highlights the need for governments to consider the role of education in the UAE and Qatar as a tool that supports both social cohesion and economic growth. Both governments and residents win when there are a full range of affordable, ethical, high-quality private schools that cater to all sectors of the community.

## Policy Recommendations

Looking ahead, there are a number of areas governments and stakeholders in the UAE and Qatar could focus on in order to address social inequalities, including the lack of access to quality education among the countries' residents. Therefore, policymakers should:

1. Conduct and promote more research on the private education context in their respective countries. Specific research areas include:
  - i. Exploring the potential of non-profit education as an alternative to the dominant model of for-profit education, and
  - ii. Investigating the ways in which the scarcity of lower-fee private schools may threaten the ability of employers, both public and private, to attract foreign talent needed to fuel continued social and economic development.
2. Continue to strengthen accountability systems among private schools to promote greater consistency and transparency in their policies and procedures.
3. Provide incentives for non-profit school operators to continue investing in their local and expatriate residents within their borders. This could mean offering support (financial, professional development, management, etc.) to non-profit schools that are falling behind and/or helping to establish new schools that will add more educational options to the educational market.

<sup>8</sup> According to recent estimates, in Qatar, 30% of private schools are non-profit, while 12% of private schools in Abu Dhabi and 21% of private schools in Dubai are non-profit (The Sheikh Saud bin Saqr Al Qasimi Foundation for Policy Research, 2015).

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## Acknowledgements

The authors would like to acknowledge the generous support of the Privatisation in Education Research Initiative (PERI), which funded this study. They appreciate PERI's continued encouragement and dedication to education research globally.

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