



EDUCATION SECTOR IN QATAR
CURRENT STATE ASSESSMENT SERIES

2021



QDB

بنك قطر للتنمية
QATAR DEVELOPMENT BANK

CEO'S MESSAGE



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QDB continues to make strides in its transformation and reinvention journey while meeting the aspirations of Qatari business owners throughout their journey with a multitude of symbiotic initiatives and growth platforms that perpetually expand possibilities for forward-looking SMEs and entrepreneurs and empower them to play an even bigger role in Qatar's transformation into a diversified knowledge-based economy and a global leader in business and innovation. In line with its objectives to establish reliable data and analysis as a prerequisite for the formation of new ventures on a sound and viable business basis, and extend meaningful support to Qatari entrepreneurs. QDB has published a series of five current state assessment reports across service sectors. To bring a fresh new outlook on potential services and arms entrepreneurs with the relevant information and perspectives that can be leveraged to enter those sectors and their niches with confidence.

This report covers Qatar's education sector with a focus on advancements in vocational training and upskilling resources, ed-tech, and blended learning environments. Government spending on education, which accounted for over 8.9% of the national budget in 2021, has contributed to the 4% CAGR growth in enrolment between 2016 and 2020. Along with targeted initiatives to upskill resources and expand infrastructure, the rising local presence of leading foreign universities collectively supports the development of a well-governed, world-class education system. Further, Qatar is gradually prioritizing vocational training and shifting the curricula from STEM to STEAM – emphasizing innovative thinking and creative ability in equal measure. In addition, ed-tech is playing an increasingly important role in enhancing access to quality education in Qatar, with both public and private schools rapidly adopting e-learning platforms, ensuring uninterrupted learning, independent of lockdowns or other logistical restrictions. There are also some examples of the use of AI, AR/VR, and gamification by institutions to improve student engagement and provide personalized learning pathways.

Qatar upholds high-quality education and training opportunities – at par with international standards – as a critical lever in achieving its long-term human development goals. The same is enshrined in the Qatar National Vision 2030 and the Second National Development Strategy 2018- 2022, which aims at stepping up the quality of education at all levels.

I strongly believe Qatar is poised to become not just a highly ranked education hub, but a global advocate of innovation in education and a key stakeholder in scientific research and intellectual activity.

I invite readers to go through the report to gain valuable insights and in-depth knowledge and understanding of this sector's prospects.

Abdulrahman Hesham Al Sowaidi
Acting Chief Executive Officer



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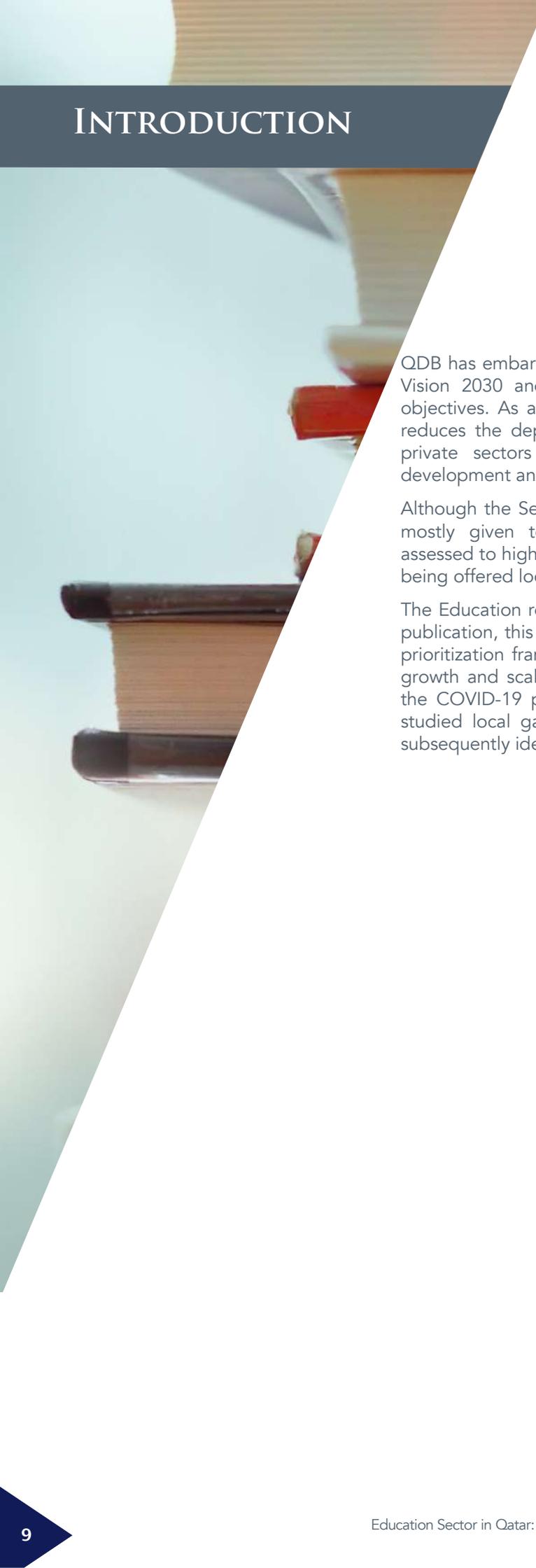
Table 1: Glossary of Terms

ABET	Accreditation Board for Engineering and Technology
AED	United Arab Emirates Dirham
AI	Artificial Intelligence
AR	Augmented Reality
Bn	Billion
BSME	British Schools of the Middle East
CAGR	Compound Annual Growth Rate
EYFS	Early Years Foundation Stage
GCC	Gulf Cooperation Council
GDP	Gross Domestic Product
HBMSU	Hamdan Bin Mohammed Smart University
HE	Higher Education
IB	International Baccalaureate
ISIC	International Standard Industrial Classification of All Economic Activities
K-12	Kindergarten through twelfth grade
KSA	Kingdom of Saudi Arabia
MOEHE	Ministry of Education and Higher Education
NEASC	New England Association of Schools and Colleges
NVTC	Nasser Vocational Training Centre
OECD	Organisation for Economic Co-operation and Development
PhD	Doctor of Philosophy
QAR	Qatari Riyal
QDB	Qatar Development Bank
QF	Qatar Foundation
QNSA	Qatar National School Accreditation
QNV	Qatar National Vision
QRDIC	Qatar Research, Development and Innovation Council
STEAM	Science, Technology, Engineering, Arts, Mathematics
STEM	Science, Technology, Engineering, Mathematics

APPENDIX: GLOSSARY OF TERMS

Table 1: Glossary of Terms

TEC	Technical Education Copenhagen
TVET	Technical and Vocational Education & Training
UAE	United Arab Emirates
UK	United Kingdom
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNEVOC	International Centre for Technical and Vocational Education and Training
US/USA	United States of America
USD/US\$	United States Dollar
VC	Venture Capital
VR	Virtual Reality
WISE	World Innovation Summit for Education
ABET	Accreditation Board for Engineering and Technology
AED	United Arab Emirates Dirham



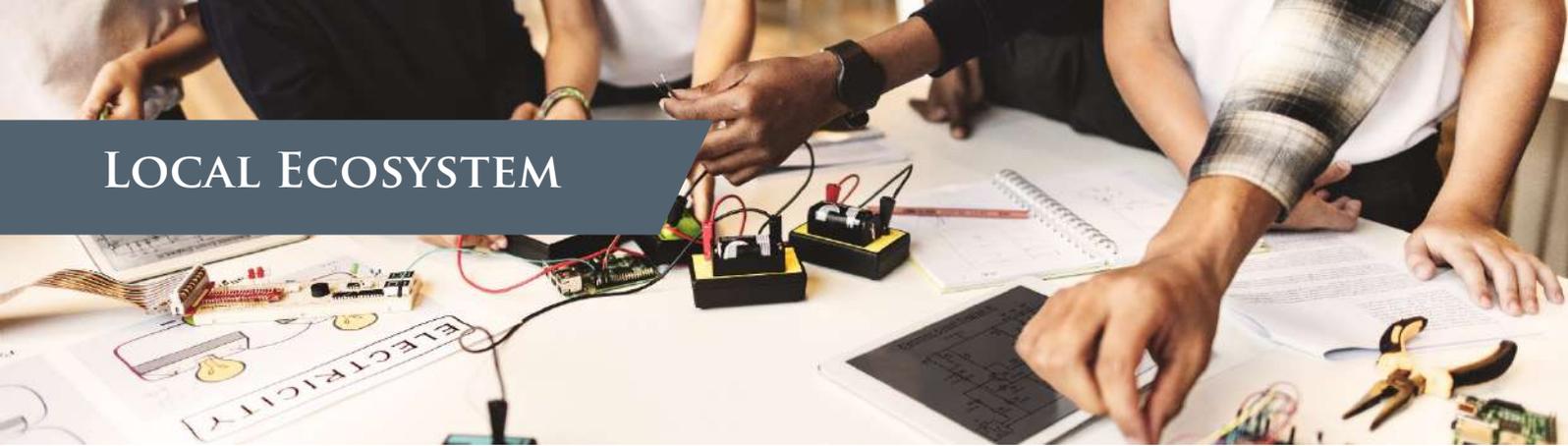
INTRODUCTION

QDB has embarked key service sectors on a journey to achieve the National Vision 2030 and the second National Development Strategy 2018-2022 objectives. As a result, to accomplish a diversified economy that gradually reduces the dependence on hydrocarbon industries, enhances the role of private sectors and maintains its competitiveness through sustainable development and localization of services in the state of Qatar.

Although the Services Sector is well-established in the region, preference is mostly given to international service providers. Focused sectors were assessed to highlight the asymmetrical deployment between services that are being offered locally and services sourced from outside.

The Education report is part of the 5 series of the Current State Assessment publication, this subsector was selected following a strict sector filtering and prioritization framework based on presence of local champions, sector size, growth and scalability as well as existence of opportunities emerging from the COVID-19 pandemic. Beyond the assessment of the sector, QDB has studied local gaps in the local market for Education-related services and subsequently identified investment opportunities for new services.

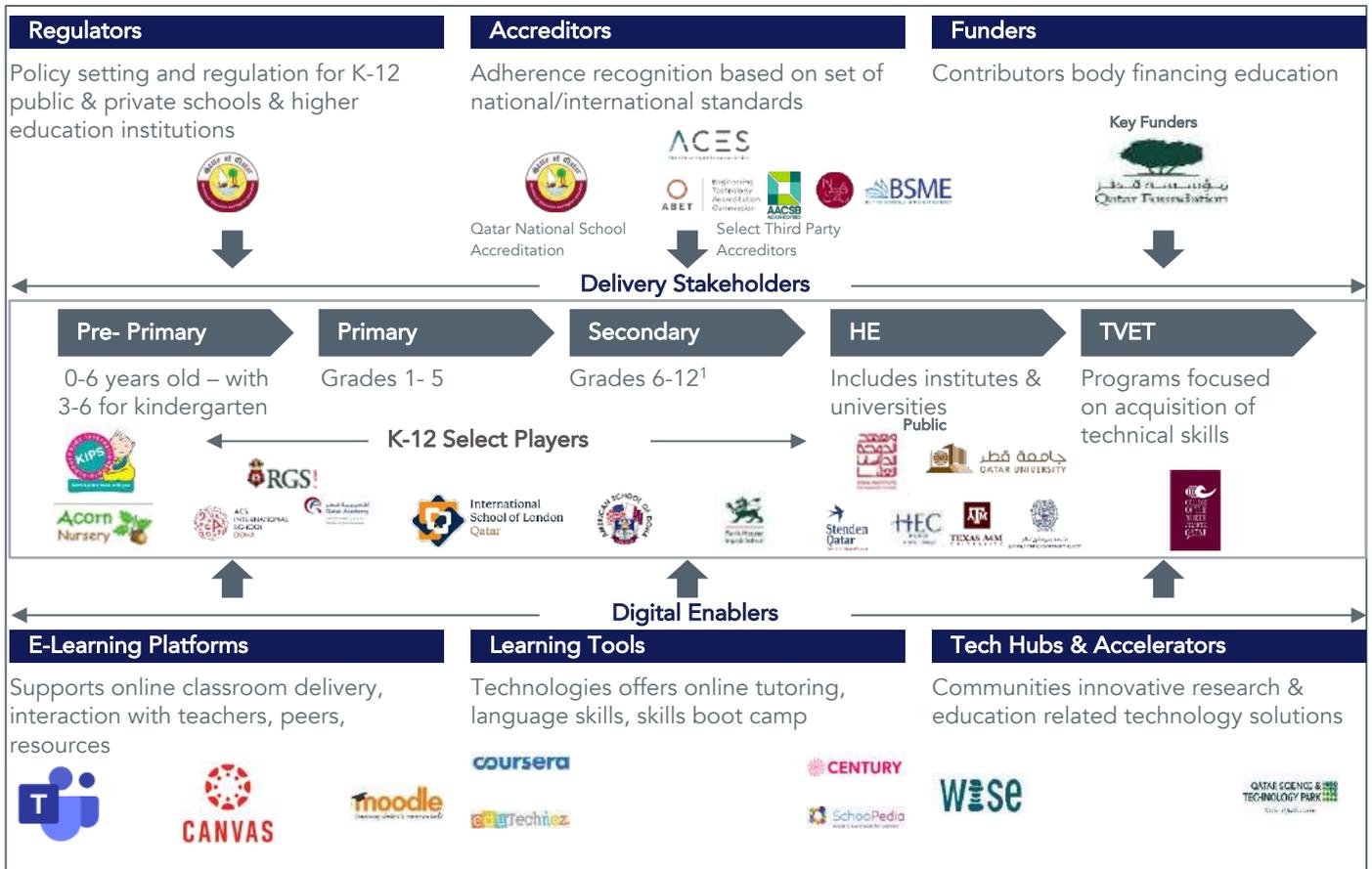
LOCAL ECOSYSTEM



Qatar’s formal education system can be divided into five levels: Pre-primary, Primary, Secondary, Higher Education, and Technical and Vocational Education and Training. The overall sector is primarily governed by a single public stakeholder: the Ministry of Education and Higher Education (MOEHE). Qatar Foundation is the primary funding body for the education sector, with local and global accreditors overseeing and maintaining high-quality standards.

Moreover, as technology increasingly becomes the mainstay of student life, e-learning platforms and tools, ed-tech hubs and accelerators are emerging as digital enablers.

Figure 1: Education Ecosystem in Qatar





Regulators

The **MOEHE** helps develop policies, supports and regulates K-12 public and private schools as well as higher education institutions. It also monitors the compliance of private schools with pre-approved educational plans. The Ministry’s key responsibilities include: tuition fees, curriculum quality and teachers.

- **Tuition fees:** The Ministry regulates fees across all schools and approves price hikes as required. It has initiated a project to determine fees for private schools and universities. The recent tuition fee increase of 3-10% for 28 kindergarten and private schools was intended for academic and educational improvement.
- **Curriculum quality:** The Ministry mandates that private schools teach Arabic language, Islamic studies and the history of Qatar as part of their curriculum. It also approves private schools’ curricula delivery, including resources and teaching methods used. As far as public schools are concerned, the Ministry requires them to instruct students on Mathematics, Science, Arabic and English languages, Qatar history and Islamic studies.
- **Teachers:** The Ministry is responsible for recruiting, training, supporting and licensing all public-school teachers. It employs national, Arab and international staff to ensure high teaching quality. The Ministry also provides per-specialty development programmes and professional licenses to the teaching staff.

Accreditors

The MOEHE formed the **Qatar National School Accreditation (QNSA)** to build a national accreditation system. The QNSA aims to improve the quality of schools and their adherence to advanced learning standards. The Doha British School, among others, is accredited by the QNSA.

The **British Schools of the Middle East (BSME)**, the **New England Association of Schools and Colleges (NEASC)** and the **Accreditation Board for Engineering and Technology (ABET)** are some of the international accreditation bodies operational in Qatar.

- The BSME has accredited ~144 members of high-quality British international schools in the region, including the Nord Anglia International School.
- The NEASC attests to the quality and integrity of schools and universities offering US curriculum globally, such as the American School of Doha and the International School of London.
- The ABET accredits college and university programmes in computing, engineering and others. It has recognised Qatar University’s Bachelor’s degree in Chemical Engineering.

Funders

With as many as 50 entities under its wing, the **Qatar Foundation** is a non-profit organisation that works in the fields of education, research and community development. It manages Education City, the multi-university campus housing world-renowned educational and research institutes.

Figure 2: Satellite Campuses



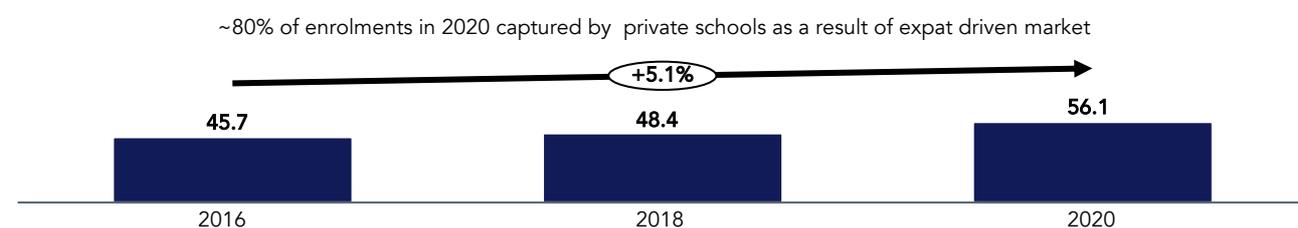
The Foundation also oversees the funding for academic research in Qatar, extends scholarships and financial aid to students, and supports research and development projects. In addition, it manages the Qatar National Research Fund, which has financed 2,300+ projects with over US\$1.4 billion to date.



Delivery

- **Pre-primary:** Enrolment in the pre-primary segment has expanded at 5.1% CAGR between 2016 and 2020, inviting a diverse range of participants like the Qatar Academy, the ACS International School Doha and the Royal Grammar School Guildford Qatar.

Chart 1: Pre-Primary Enrolments Thousand, (000s, 2016-2020)



Select Players (out of ~473 schools)



- ✓ Founded by QF, offers National curriculum via play based approach



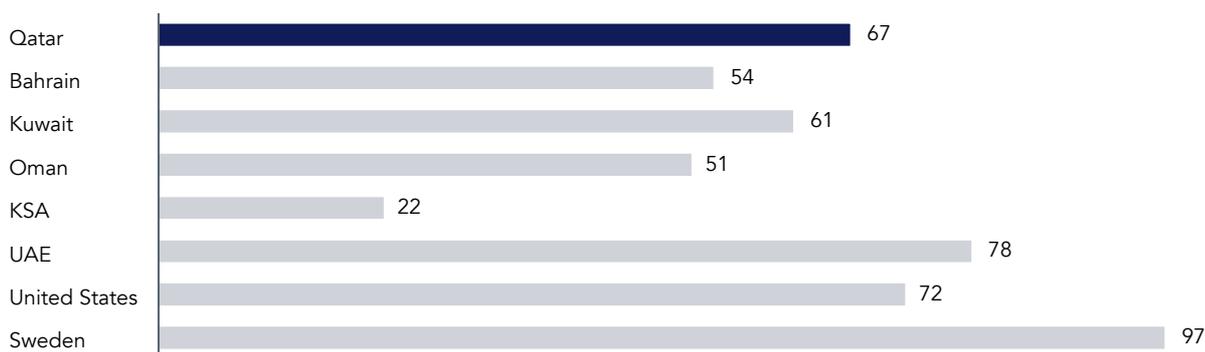
- ✓ Private school offering IB curriculum & follows Early childhood program



- ✓ Independent school offering UK curriculum & follows EYFS¹

While the gross enrolment ratio lags international markets, targeted Government strategies like awareness campaigns and quality delivery are expected to boost the segment.

Chart 2: Gross Enrolment Ratio (2019)



Government Strategies

- ✓ **Awareness campaigns** on the importance of pre-primary education with a focus among nationals as education is only compulsory at the primary level
- ✓ Focus on improving **quality offering** at the primary school levels to align with international standards



- Primary & Secondary:** At 3.3% CAGR growth between 2016 and 2020, the number of primary and secondary schools in Qatar has increased in line with total student enrolments (3.6% CAGR between 2016 and 2020). Some of the prominent schools are the International School of London, the American School of Doha and the Park House English School. That said, there is still room for more growth in these segments.

Chart 3: Primary and Secondary Enrolments by School Type

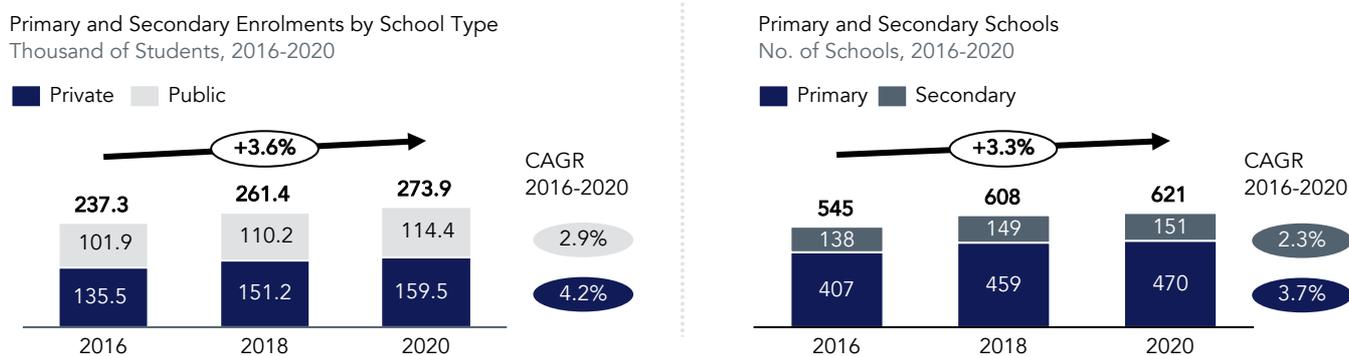


Figure 3: Select Players (out of ~608 schools)

- ✓ Private school offering IB curriculum delivered in interactive/high tech classrooms
- ✓ Private school offering US curriculum
- ✓ Private school offering UK curriculum & with a mix of in person/remote learning delivery

The Government has introduced the Qatar Public Private Partnership Schools Development Program to cater to the rising demand of a growing population and their need for high-quality education.

Figure 4: Public Private Partnership Schools Development Program

- ✓ Implemented by govt. in an attempt to **cater to supply gaps** in light of growing population & need for high quality education
- ✓ **~57% of current schools are private** & unable to meet growing demand
- ✓ **45 schools** forecasted to be delivered in 2023 adding ~ 6,000 seats for primary, & secondary schools but also pre-primary levels

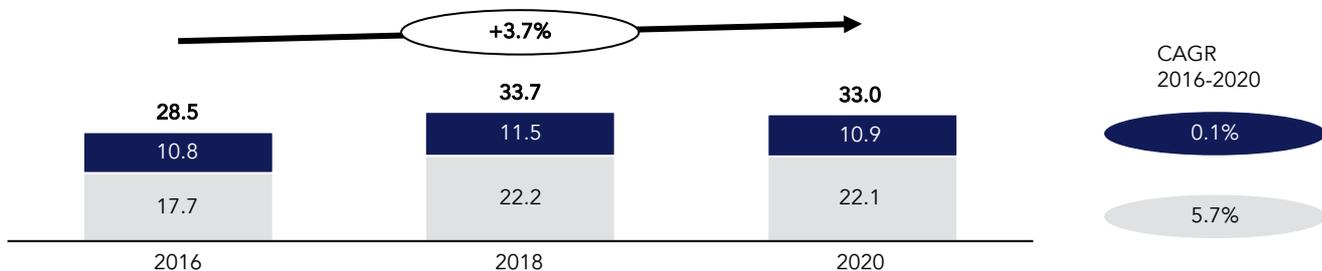


- **Higher Education:** Enrolment at the Higher Education level appears to be driven by local and girl students. This can be attributed to major state-run initiatives like the Education City.

Chart 4: Higher Education Enrolments by Nationality (000's, 2016-2020)

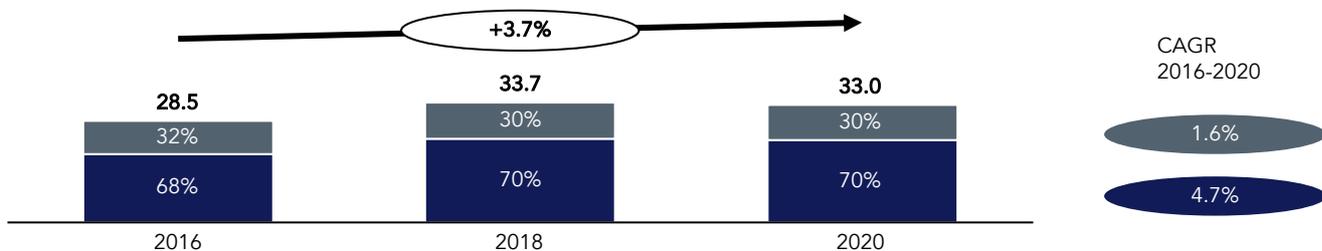
Higher Education Enrolments by Nationality

Foreign Local



Higher Education Enrolments by Gender
No. of Schools, 2016-2020

Male Female



The multi-campus 'Education City' was launched by the Qatar Foundation to attract foreign universities and improve the quality of higher education. It is home to nine marquee universities and 11 schools with ~8,000 students. For example, Qatar University is a public university in Education City, with 10 colleges offering graduate, postgraduate and doctorate programmes. HEC Paris School of Management, the top institution for management programmes, is the first European partner of Education City. The campus also houses research centres, such as the Qatar Science & Technology Park, to encourage innovation and entrepreneurship.

- **Technical and Vocational Education and Training (TVET):** TVET is a nascent segment in Qatar, accounting for only 1.8% of all secondary students in 2019. Recognised as a Centre of Excellence in TVET, College of the North Atlantic Qatar offers 30 diploma programmes in the fields of Business Management, Information Technology, Engineering Technology and Health Sciences. It is the designated UNEVOC Centre for Qatar and partners with UNESCO on exploring the role of TVET in the country.
- There are certain challenges associated with TVET like poor perception, lower financial reward and lack of awareness that hinder its development. However, government projects – like establishing a National Qualification Framework, upskilling TVET teachers and putting into place a robust governance structure – are expected to drive growth in the segment.



Figure 5: TVET Perception, Low Financial Reward & Lack Of Awareness Represent Top Challenges...

 **Inferior Perception of TVET**

- Difficulty in attracting & retaining Qataris as TVET perceived as secondary education option

 **Low Financial Reward**

- University graduates are usually on a higher salary scale compared to TVET diploma holders

 **Lack of Awareness**

- Limited knowledge on good career paths in TVET, in comparison to university

...However, Several Govt. Initiatives Are Expected To Boost Segment Demand

 Establishment of a National Qualification Framework for quality assurance & occupational standards benchmarked v.s global best practices

 Upskilling of TVET teachers by providing continuous training & workshops

 Establishment of a governance structure to monitor quality & performance & set policies

Digital Enablers

E-learning platforms and ed-tech hubs are gaining prominence as digital enablers, particularly in the wake of COVID-19. Public schools in Qatar have initiated the use of Microsoft Teams from 2020, while Northwestern University-Qatar initiated the use of the Canvas Learning Management System post-pandemic. Further, opportunities are arising for integrating e-learning tools in delivery. Qatar is witnessing fragmented adoption of gamification, VR technology, AI-powered student assessment across private and public K12 schools as well as higher education institutions.

- **E-learning Platforms**

- **Microsoft Teams** is an education-specific platform with options to create an interactive environment. Features include assignment tracking/grading, whiteboard, etc.
- **Moodle** allows teachers to extend content/courses on the platform. Features include collaborative forums, progress monitoring, live feedback on assignments, etc.
- **Canvas** supports videoconferencing and course management. Features include content management, blended learning and interactive blended learning.



- **E-learning Tools**

- **Courseera** provides online courses from top global universities. It facilitates hands-on learning in various sectors.
- **eduTechnoz** supports online Arabic learning for primary students and schools. It utilises a gamified platform for grading and adaptive learning.
- **SchooPedia** hosts a K-12 educational digital library and offers videos/books on curriculum subjects in Qatar.
- **Century** provides AI-generated dashboards to help track student progress. It is adaptable to curricula and offers personalised development plans for students.

- **Tech Hubs and Accelerators**

- **World Innovation Summit for Education (WISE)** is an initiative of the Qatar Foundation, focused on transforming education through innovation. It addresses urgent challenges and current ed-tech trends, in consultation with key stakeholders and industry experts. The WISE Prize for Education celebrates projects that address global education challenges, thereby encouraging investments.
- **Qatar Science & Technology Park** is an innovation hub focused on education, research and development, and community wellbeing. The Park includes an incubation centre to nurture local entrepreneurship and an Arab Innovation Academy in partnership with the European Innovation Academy.

VALUE CHAIN

Table 2: Value Chain

Qatar's education value chain primarily consists of four segments: accreditation and certification, curriculum and content design, delivery and assessment; and is heavily dominated by international players.

Segment	Description	Activities/Services involved	Global players*	Local players*
Accreditation and certification	Recognising and approving academic programmes and courses based on established standards	<ul style="list-style-type: none"> Accreditation** Certification** 	   	 
Curriculum and content design	Designing the structure and content of what students learn and the evaluation mechanisms for the same	<ul style="list-style-type: none"> Curriculum design** Lesson design** E-pedagogy** Use of VR/AR** Content gamification** Educational consulting** 	    	 
Delivery	Providing educational services to learners including teaching; it includes types of provisions, learning environments, teachers/faculties and research and development	<ul style="list-style-type: none"> Pre-primary education Primary education Special education for handicapped students Provision of adult literacy programmes General school education at the first stage of secondary level General school education at the second stage of secondary level Special education for handicapped students at secondary level Technical and vocational education Tertiary education Cultural education Academic tutoring College board preparation Language instruction and conversational skills instruction Other skill-based training Educational consulting Educational guidance counselling Student exchange programmes Remote learning software** Online course repositories** Certified teacher training** 	          	    

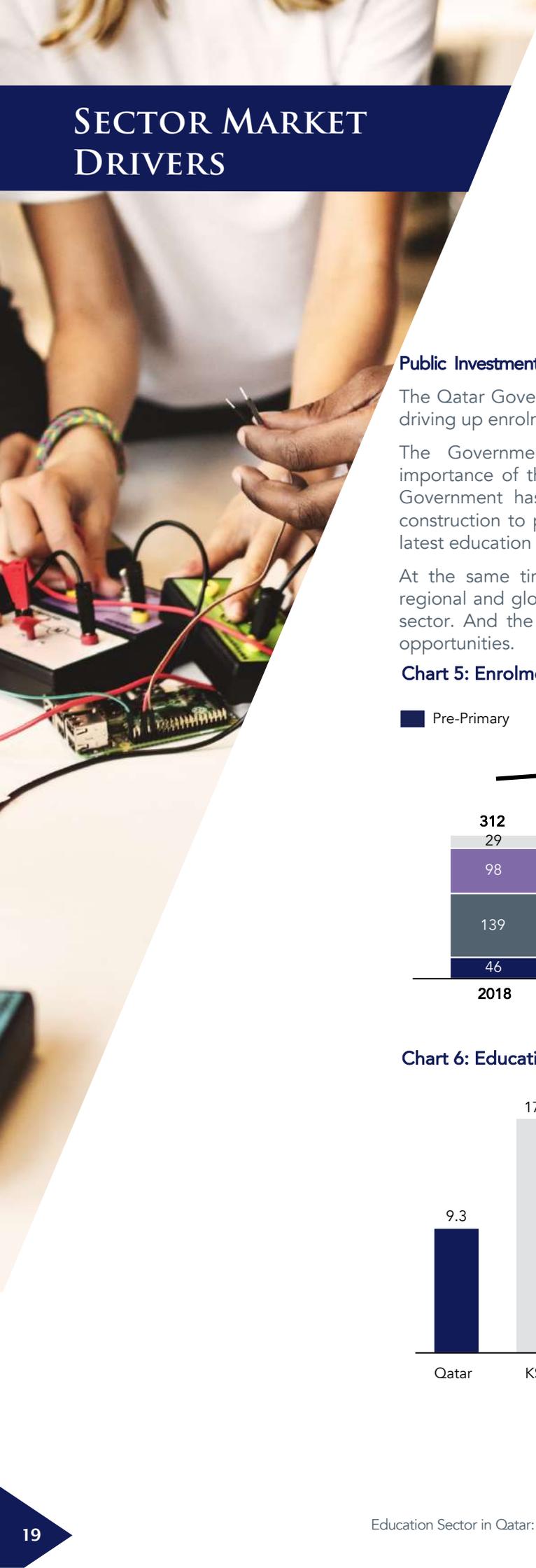


Segment	Description	Activities/Services involved	Global players*	Local players*
Assessment	Measuring student performance and evaluating student learning and progress on a regular and more frequent basis	<ul style="list-style-type: none"> Professional examination review courses Educational testing evaluation services Educational testing services Standardised testing** Bespoke testing** AI-powered student performance monitoring** 		

*Non-exhaustive

**Non-ISIC suggested additional service

SECTOR MARKET DRIVERS



Public Investment

The Qatar Government's quality-focused initiatives are largely responsible for driving up enrolments at the pre-primary and secondary school levels.

The Government has improvement plans in place, emphasising the importance of the pre-primary segment through awareness campaigns. The Government has also initiated the renovation of public schools and new construction to plug gaps in supply and provide quality education using the latest education resources.

At the same time, Qatar's current education expenditure, compared with regional and global benchmarks, indicates room for further growth within the sector. And the Government appears to be on track to capitalise on these opportunities.

Chart 5: Enrolment by Education Level (000's)

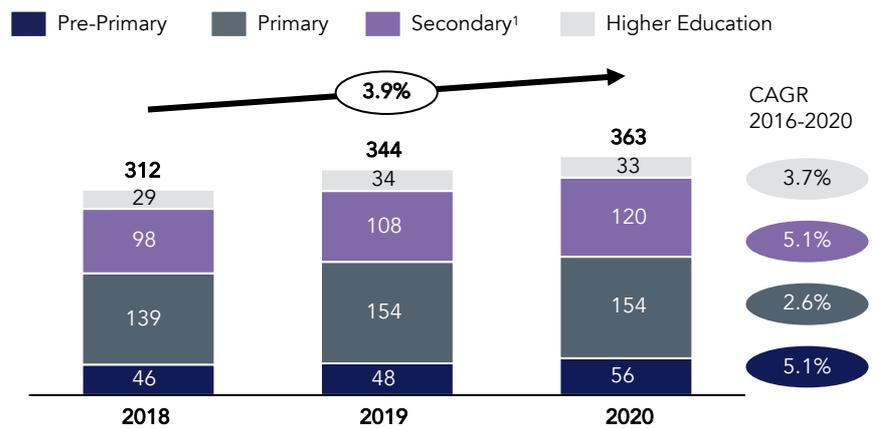
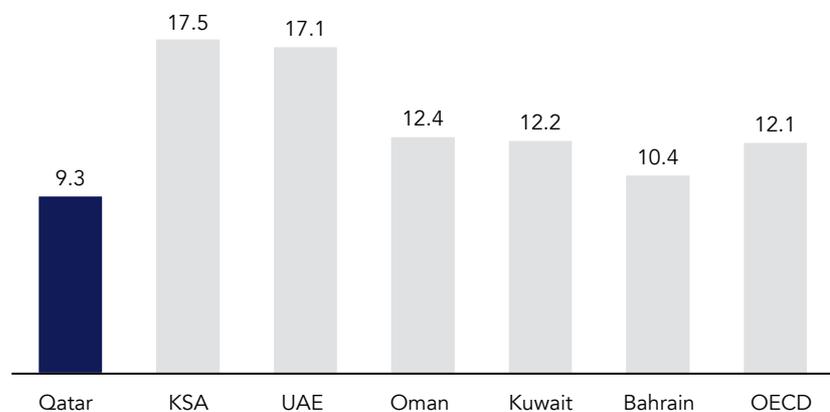
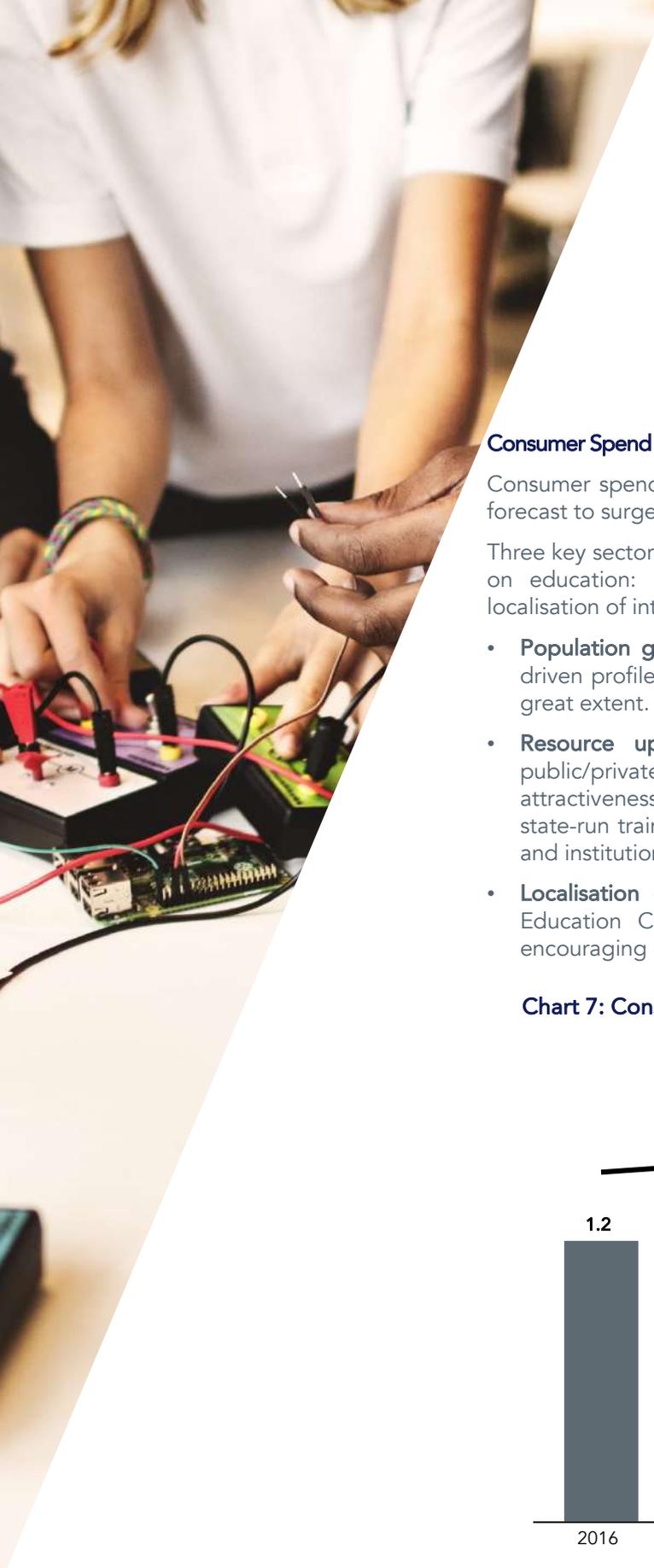


Chart 6: Education Expenditure (% of Government Spending, 2019)





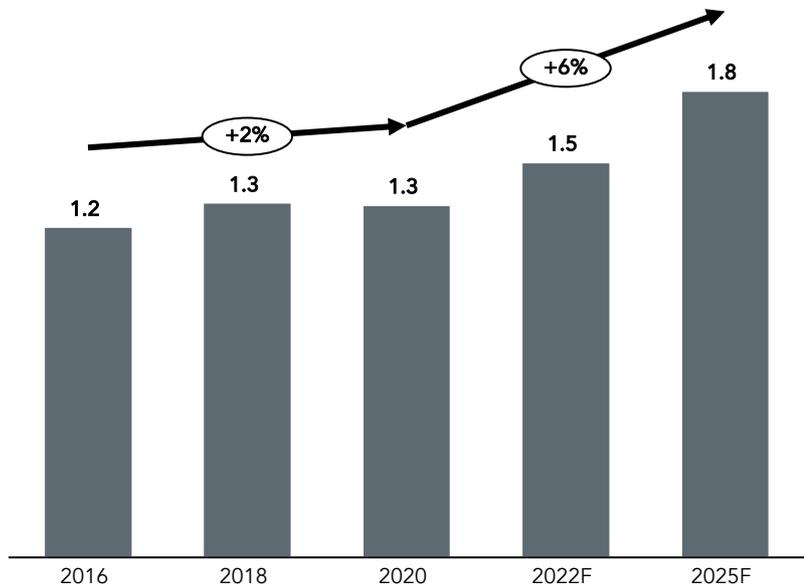
Consumer Spend

Consumer spending has grown at 2% CAGR between 2016 and 2020 and is forecast to surge at an accelerated CAGR of 6% by 2025.

Three key sectoral and demographic trends are propelling consumer spending on education: population growth, resource upskilling and training, and localisation of international providers.

- **Population growth:** Rising overall population, particularly the expatriate-driven profile, in Qatar is steering the demand for education services to a great extent.
- **Resource upskilling and training:** Government focus on equipping public/private schools with highly qualified teachers to improve sector attractiveness is another key factor. For instance, the recent launch of a state-run training project will benefit ~180 teachers across private schools and institutions between 2018-2022.
- **Localisation of leading international providers:** Projects like the Qatar Education City are opening doors to eminent foreign universities – encouraging consumer spend and driving up sector attractiveness.

Chart 7: Consumer Spending on Education (USD Bn)



GLOBAL TRENDS AND THEIR REGIONAL ADOPTION

Accelerated Adoption of Technology

Even before the pandemic, there was already widespread acknowledgement of the importance of technology in education. From language apps and virtual tutoring, to video conferencing and online learning software, technology is proving to be a lifeline for students and teachers alike. Global ed-tech witnessed US\$4.5 billion investment from VC firms in the first half of 2020 alone.

1. E-learning

E-learning helps ensure uninterrupted learning in an interactive environment. Distance learning is being integrated with content delivered via tablets and other devices.

Global Adoption

- Nord Anglia in the **UK** started a modern form of primary school to help students learn and collaborate virtually – offering both continuous learning and ease of access. The virtual school allows students to connect with ~66,000 students through a 'Global Campus', enhancing collaboration on challenges and learning activities.
- Since switching to remote learning for all its offerings, University College London has utilised a range of tools to improve the student experience including Moodle, Turnitin (anti-plagiarism assignment submission software), Lecturecast (lecture scheduling and recording software) and MyPortfolio (online space to display students' portfolio).

Regional Adoption

- The Hamdan Bin Mohammed Smart University (HBMSU) in **Dubai** is the first e-learning academic institution accredited by the Ministry of Education, UAE. It offers online and distance learning for Bachelor's, Master's and PhD degrees. The HBMSU is the first in the Gulf Cooperation Council (GCC) to become a member of the International Council for Open & Distance Education. The HBMSU's learner-centric platforms facilitate access, interactivity and learning.
- Aldar Academies in **Abu Dhabi** invested AED10 million in their IT infrastructure to support distance learning – purchasing iPads and laptops to aid students facing financial difficulties and exploring options for remote learning options beyond COVID-19.
- The MOEHE decided to implement e-learning in **Qatar's** public schools in 2020. Adoption of remote learning in private schools is focused on collaboration and enquiry.

2. Artificial Intelligence

AI has a wide range of applications, benefitting both students and teachers. Examples include automated multiple-choice grading and student performance monitoring.

Regional Adoption

- Doha College in **Qatar** introduced the use of Century to analyse student performance, generate personalised dashboards and recommend development pathways.



3. Gamification

Gamification allows curriculum components to be taught via games where students can score points. It enables interactive and engaging learning environments, while stimulating critical thinking and problem solving.

Global Adoption

- In the **US**, Ball State University developed a mobile application that uses gamification to improve collaboration, engagement and learning outcomes within and outside the classroom. Students were rewarded through points for completing a wide array of activities, with additional points on high-impact achievements.
- The University of South California launched a new campaign to reward first-year students through a prize/coupon-based system – using university resources to augment their skills. Gamification enabled the students to gain a richer and more productive learning experience based on knowledge and experimentation.

Regional Adoption

- The HBMSU in **Dubai** introduced EduGame to increase students' motivation and understanding of key concepts. Students engaged in several activities – like interactive discussions on published case studies, community work and volunteering – with completion linked to a point-based system. EduGame was seen to enhance interpersonal and analytical skills of students.
- The educators at **Dubai's** Jumeirah English Speaking School introduced gamification to support content delivery – creating an engaging environment and fostering interpersonal skills. Students became fantasy characters and were rewarded for homework completion, collaboration, reading/writing progress, etc.
- Founded in **Qatar** and based out of Canada, eduTechnoz gamifies Arabic language courses for primary school children.

4. Augmented/Virtual Reality

AR offers an enriched view of a natural image, while VR projects a simulated reality. Both aid in interactive learning and simplified explanation of concepts using close-to-real-life experiences.

Regional Adoption

- **Qatar's** School of Science and Technology for Boys, a public tech-specialised school, recently introduced VR labs; and the Qatar University developed a VR system to teach courses.

5. Vocational Education

Specialised training prepares a worker with skills to meet the demands of industry-specific jobs. For instance, the Technical Education Copenhagen (TEC)

Global Adoption

- in **Denmark** is a large vocational college, offering 25 programmes across sectors, such as energy and transport. It also delivers adult vocational courses via state-of-the-art facilities. TEC programmes balance pedagogy and on-job training – presenting students the opportunity to gain deeper industry knowledge and acquire essential training and skills.

- In the **US**, the Washburn Institute of Technology provides industry-specific training in eight areas, such as construction, hospitality and human services, and transport. Partnerships with key industry players allow students to enhance their skills and acquire hands-on experience.

Regional Adoption

- Vocational education is particularly dominant in the GCC countries, since a large proportion of their population comprise highly skilled expats, which puts pressure on the employment opportunities available to locals.
- The Nasser Vocational Training Centre (NVTC) in **Bahrain** offers a three-year programme with core and foundation level courses, along with an opportunity to specialise in mechanical or electrical engineering maintenance. NVTC programmes are designed to be at par with international industry standards; thus, ensuring NVTC graduates are employable and ready to meet the requirements of local and global commercial enterprises.
- Bahrain's National Institute for Industrial Training is the first in the country to offer internationally recognised short engineering courses tailored to the needs of the employer and the industry. The Institute aims to alleviate employment disparity, improve industry-specific skills and knowledge, and generate opportunities for employment.
- In **Qatar**, the College of the North Atlantic is a Centre of Excellence in TVET, with a wide range of programmes like Business Management, Information Technology, Engineering technology and health sciences.

6. Shift in Curriculum from STEM to STEAM

STEAM sees the introduction of Arts to STEM, where Arts includes humanities, languages, dance, drama, music, visual arts, design and new media. The transition from STEM to STEAM underlines the contribution of arts and creative thinking as well as collaboration and experimentation towards the holistic development of a student's skillset.

Regional Adoption

- Students at the Nord Anglia International School in **Dubai** tackle real-world challenges across various subjects, enhancing flexibility, communication and creativity. The school's partnership with USA's Massachusetts Institute of Technology allows students to immerse themselves in hands-on problem-solving experiences. Projects include robot building, bioengineering, coding and so on.
- Interdisciplinary courses at the Regent International School in Dubai focus on nurturing problem solving, critical thinking and creativity among students through real-world projects. Right from the primary school level, students are taught to apply technology skills, while secondary school students are exposed to insights from industry mentors.
- All three Nord Anglia Education schools in **Qatar** also follow the STEAM curriculum, providing an interdisciplinary and experimental approach. Similarly, the Arab International Academy integrates STEAM principles, amplifying student engagement via projects and practical activities.



COVID-19 IMPACT

Restrictions imposed to contain the spread of COVID-19 caused disruptions in the education sector that extended beyond online delivery of courses and content – and compelled institutions to rethink tuition fees, student engagement and curriculum development.

Delivery and Assessment

- Disrupted delivery and assessment methods, especially for admission and summative examinations
- Required education providers to adapt and invest in online tools to reimagine delivery and assessment

Tuition Fees

- Increased dropout rates owing to students' financial, health and family-related concerns
- Limited students' full on-school experience, raising their demands for discounts
- Initiated assessment of more flexible tuition fees

Student Body

- Lowered enrolment of new international students for the next academic year, on account of the disrupted 'student experience'
- Pushed for redesign of course offering to retain and attract new international students

Employability

- Hiked up unemployment and financial strain
- Brought about a shift in demand for worker skills owing to the digital disruption
- Forced institutions to re-examine current curricula to match market needs for greater chance of successful student placement

SWOT ANALYSIS

Figure 6: SWOT Analysis



STRENGTHS

- Presence of global universities & international school operators (e.g., Education City) contributing to sector attractiveness, quality improvement & increase in consumer expenditure
- Global advocacy to enable innovation in education (WISE) and entity focused on Research, Development and Innovation (QRDIC)



WEAKNESS

- Limited definition of future required skills required at national level for job markets
- Fragmented integration of wider educational technology as part of the curriculum
- Limited interest in local entrepreneurs develop innovative education service solutions to boost sector quality and advancements



OPPORTUNITIES

- Room to adopt new/innovative global educational technologies locally such as gamification, VR technology, AI-powered student assessment across private and public K12 and higher education using Education City institutions as a testing ground
- Recent lift of blockade allows Qatar to benefit from regional expertise & collaborations to improve sector and boost small businesses (e.g., regional funding/access to industry experts, etc.)



THREATS

- Demographic profile dominated by expatriate population with uncertainty around population growth following the World Cup
- Recent lift of blockade will introduce new competitors in education services

CONCLUSION

Through the years, the Qatar Government's continued investments in education reforms have been aimed at expanding access to quality education for a growing population, preparing its future workforce with the right skills and shoring up the path to resilient, inclusive and sustainable economic growth.

Today, Qatar's education sector consists of a diverse mix of state and independent schools, colleges and universities. The sector pays close attention to harmonising with international standards and benchmarks, while also preserving an understanding of local history and culture. The current phase of education policies and reforms are particularly crucial, as this generation of learners and workers are expected to transform Qatar into a knowledge-based economy by 2030.

The flagship initiative, Education City has emerged as a centre of possibilities, fostering an ecosystem of innovation and entrepreneurship. Qatar Foundation's WISE programme has become a global advocate for innovation in education and a strong proponent of research.

COVID-19 accelerated many of the changes that had been already in play in the sector. Schools and universities in Qatar have widely adopted e-learning platforms. There is also some scattered evidence of the nascent adoption of AI-powered monitoring, gamification and AR/VR as well as integration of learning tools into the regular curriculum as a means to enrich students' learning journeys.

Sustained government action to set and achieve steep development standards across all levels of education, along with the localisation of foreign colleges and universities will boost the prospects of the sector over the next decade.

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Qatar Development Bank (QDB) was founded by Emiri Decree to grow Qatar's private sector and diversify its economy. His Highness Sheikh Hamad Bin Khalifa Al Thani, the Father Amir, identified these as vital tasks in developing Qatar into a modern state. Since its establishment in 1997, QDB has been at the forefront of these efforts. It has worked with thousands of Qatari entrepreneurs and enterprises and has provided investment and guidance to brand-new start-ups and well-established corporations. QDB has built a reputation for identifying promising investment opportunities. Its focus is on growing SMEs in key sectors by offering several services via a single window to support expected growth. Through smart, targeted financing products and advisory support services, QDB is nurturing a sound and sustainable knowledge-based economy for Qatar.

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