



# EDUCATION SECTOR IN QATAR



**QDB**

بنك قطر للتنمية  
QATAR DEVELOPMENT BANK



# EDUCATION SECTOR IN QATAR





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The education sector's contribution to GDP has increased from 1.3% in 2012-2013 to 3.3% in 2018-2019. This is mainly due to the introduction of several reforms and substantial investment by the government of Qatar in the education sector.

## CEO'S MESSAGE

// In its 2020 budget, the government allocated QAR 22.1 billion for the education sector which represents 10.5% of its total expenditure. Government spending will focus on the launch of new schools and expansion of existing educational facilities.

As a part of Qatar's initiative to promote private sectors' entrepreneurship (particularly the small and medium-sized enterprises), which are vital tributaries to the country's aspired, diversified and sustainable economy. Qatar Development Bank (QDB) plays a vital role in this domain where it puts a great deal of time and effort into promoting local entrepreneurship and facilitating the formation of new ventures on a sound and viable business basis.

QDB's role is not limited to financing enterprises, as it provides SMEs and entrepreneurs with non-financial support services throughout all the phases of their businesses to achieve its vision "to develop and empower Qatari entrepreneurs and innovators to contribute to the diversification of the Qatari economy".

In line with its objectives to establish reliable data and analysis as a prerequisite for new business ventures and to extend meaningful support to Qatari entrepreneurs, QDB has published a series of reports on potential SME opportunities currently available across various sectors in the local market.

These reports aim at providing entrepreneurs potential opportunities to enter sectors with relevant information and perspective pertaining to these sectors, which includes competitive landscape and data pertaining to existing companies operating in such sectors.

This report covers Qatar's education sector with a focus on three major segments namely: pre-primary, primary and secondary. The education sector's contribution to GDP has increased from 1.3% in 2012-2013 to 3.3% in 2018-2019. This is mainly due to the increased focus of the government of Qatar, which has introduced several reforms and made substantial investments in the education sector. In its 2020 budget, the government allocated QAR 22.1 billion for the education sector which represents 10.5% of its total budget. Government spending will focus on the launch of new schools and expansion of existing educational facilities. Qatar's private school industry has the potential to reach QAR 8.7 billion by 2023 driven by rising school-aged population, enrolment, tuition fees as well as the shift in preference towards admission of students in private schools. The country has initiated its National Vision 2030 as a part of its long-term strategy which includes human development as one of its main pillars that will focus on the development and advancement of the education sector.

I invite readers to go through the report to gain in-depth knowledge about this sector's prospects.

**Abdulaziz bin Nasser al-Khalifa**  
Chief Executive Officer



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## ACRONYMS AND ABBREVIATIONS

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bn	Billion
CAGR	Compound Annual Growth Rate
GDP	Gross Domestic Product
GER	Gross enrolment ratio
HDI	Human Development Index
MEHE	Ministry of Education and Higher Education
MoTC	Ministry of Transport and Communications
NER	Net Enrolment Ratio
PSA	Planning and Statistics Authority
sqm	Square Meters
USD	United States Dollar
QAR	Qatari Riyal

# EXECUTIVE SUMMARY



Over the last decade, Qatar has undertaken several initiatives and implemented reforms aimed at modernizing its educational system. This has led to significant progress towards building a world class educational system. The Ministry of Education and Higher Education currently is the main body in charge of education in Qatar. Education is free for Qatari nationals. As the system evolved, the reforms also addressed the qualification standards for teachers and their leadership qualities by establishing professional standards and professional licenses for teachers. Under the reforms, curriculum standards that address both academic and non-academic dimensions of learning were also introduced. Thus, the teaching strategies were envisioned and designed to become more student-centred by using modern information, communication technology, and conducting scientific research. In 2018-19, the education sector contributed 3.3% of Qatar's GDP (1.3% in 2012-13). The government of Qatar has invested a huge amount in achieving the goals of Qatar National Vision 2030. Qatar plans to shift to a knowledge-based economy as an enabling element of social and economic progress with sustainable development across all sectors. Qatar has a large and growing expat population settled in Doha, Al Wakrah and Al Rayyan, leading to an increase in demand for educational institutions in these locations. Qatar has also witnessed a growing trend towards private education, which has brought in well reputed international institutions. These institutions provide diverse curriculums and offer global standards that appeal particularly to the expat population. The number of private schools and the enrolments within those schools is higher compared to public schools since all public schools do not admit expat students (except for special provisions), apart from this, parents prefer providing their children with exposure to international curriculums and fluency in English language. As of 2018-19, there are 482 schools in Qatar (both private & public). Several expatriate communities have their own schools and educational syllabus. However, these schools are operated under the guidelines of the Ministry of Education and Higher Education (MEHE).

## **Education Sector Segmentation:**

The education sector in Qatar is segregated into following distinct segments:

- Early Childhood schools up to the age of 4
- Pre-primary education up to the age of 5
- Primary education from grades 1 to 6 (age group of 6 to 11 years)
- Preparatory education from grades 7-9 (age group of 12 to 14 years)
- Secondary education for grades 10 to 12 (age group of 15 to 17 years)

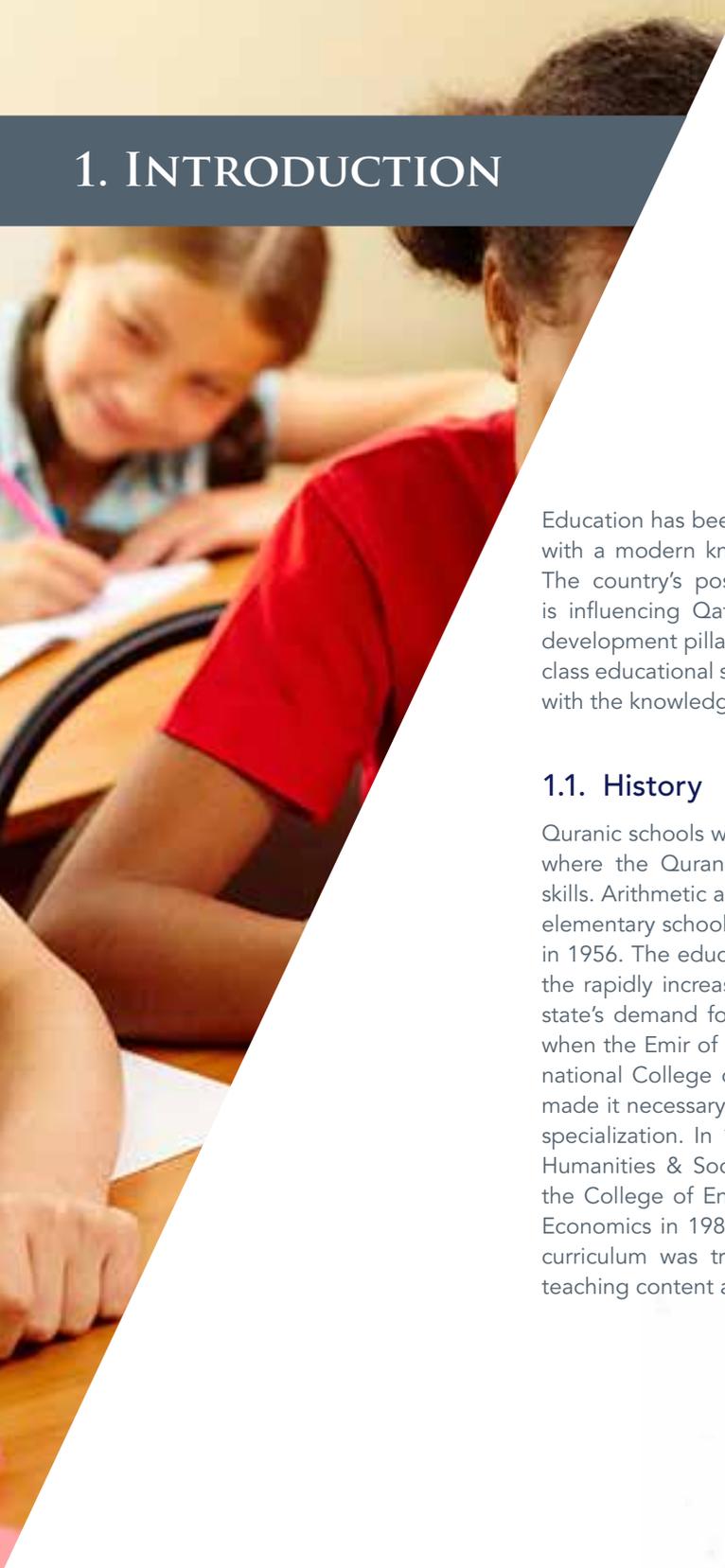
**1. Early Childhood:** Early Childhood development in Qatar has the potential of enhancing children's academic performance in primary and secondary schools. The functioning of Early Childhood falls under the control and supervision of the Ministry of Administrative Development, Labour and Social Affairs (MADLSA). Initially, Qatar's education system followed the traditions of Arabic Early Childhood schools. However, with a view of setting international benchmarks, foreign Early Childhood schools were established of which many are operated only by private



players. Enrolment in Early Childhood schools decreased from 14,193 in 2012-2013 to 7,511 in 2018-2019, declining at a CAGR of 10.1% during this period. The number of schools offering education within Early Childhood in Qatar increased from 108 in 2012-2013 to 184 in 2018-2019, growing at a CAGR of 9.3%. The curriculums followed by these Early Childhood include Montessori and Early Years Foundation Stage (EYFS) among others.

2. **Pre-primary:** The enrolment of students into pre-primary schools increased significantly during the last six years. A total of 293 schools provide pre-primary education in 2018-2019, including 46 female-only, 37 male-only and 210 mixed schools. Around three-fourths of all schools during the past six years were private sector schools. There are 221 private schools, the main curriculums provided by these schools include British, American and Indian. Total capacity of the pre-primary segment stands at 54,136 seats in 2018-2019, while enrolments this year was 48,446, thus indicating an excess capacity of 5,690 seats. Student enrolment is estimated to grow to about 54,220 in 2023-24, while the corresponding number of seats is expected to reach 60,588.
3. **Primary:** A total of 288 schools offered primary education in 2018-19, including 64 female-only, 70 male-only and 154 mixed schools. The number of primary school teachers across Qatar increased at a CAGR of 3.3% between 2012-13 and 2018-19. Student enrolment in primary schools increased at a CAGR of 6.8% between 2012-13 and 2018-19, while enrolment of non-Qatari students increased at a CAGR of 8.4%, the enrolment of Qatari students increased at a CAGR of 3.6% during the same period. Most of the schools offering British and Indian curriculums are largely concentrated in the municipalities of Doha and Al Wakrah. Total capacity of the primary segment stands at 172,695 seats in 2018-19, while student enrolment was 157,196, thus indicating an excess capacity of 15,499 seats. Student enrolment is estimated to grow to 175,760 in 2023-24, while the corresponding number of seats is expected to reach 193,089, indicating an excess capacity of 17,329 seats.
4. **Preparatory:** A total 177 schools provide preparatory education, including 37 female-only, 39 male-only and 101 mixed schools. The number of preparatory school teachers has increased at a CAGR of 3.8% between 2012-13 and 2018-19. Student enrolment in preparatory schools increased from 42,430 enrolments in 2012-13 to 60,866 enrolments in 2018-19, growing at a CAGR of 6.2% during this period. Total capacity of the preparatory segment stands at 67,049 seats in 2018-19, an excess capacity of 6,183 seats. Student enrolment is estimated to grow to about 68,048 in 2023-24, while the corresponding number of seats is expected to reach 74,934, indicating an excess capacity of 6,886 seats.
5. **Secondary:** A total of 153 schools offer secondary education in 2018-19, including 35 female-only, 42 male-only and 75 mixed schools. Student enrolment in secondary schools increased from 36,576 enrolments in 2012-13 to 51,491 enrolments in 2018-19, growing at a CAGR of 5.9% during this period. Student enrolment in private schools grew at a CAGR of 9.6%, while enrolments in public schools grew at a CAGR of 3.3% between 2012-13 and 2018-19. The share of students in private schools increased significantly from 37% in 2012-13 to 46% in 2018-19. About 44% of the total secondary schools are in the municipality of Al Rayyan, 28% are in Doha, while 9% are in Al Wakrah. Secondary schools in Qatar offering British, American and Indian curriculum are among the top three in almost all municipalities. Total capacity of the secondary segment stands at 57,073 seats in 2018-19, while student enrolments was 51,491, thus indicating an excess capacity of 5,582 seats. Student enrolment is estimated to grow to 55,925 in 2023-24, while the corresponding number of seats is expected to reach 66,990.
6. **Special Needs Students:** Apart from the above-mentioned segments, public schools also have a provision for intake of Special Needs children. The number of Special Needs students in public schools was 1,453 in 2017-18. To meet the lack of inclusive schools, a few Child Development Centres have been opened in Qatar. These centres in Qatar provide Applied Behaviour Analysis (ABA) therapy supervised by board-certified behaviour analysts. The centres also provide speech therapy, language therapy, occupational therapy, and an early intervention program. These centres are open to children of both nationals and expats. Also, many schools have started to open their doors to provide education services to Special Needs students. Special Education is playing a very important role in understanding the varying abilities and diverse learning needs of children preparing them to pursue a productive and meaningful life in society.

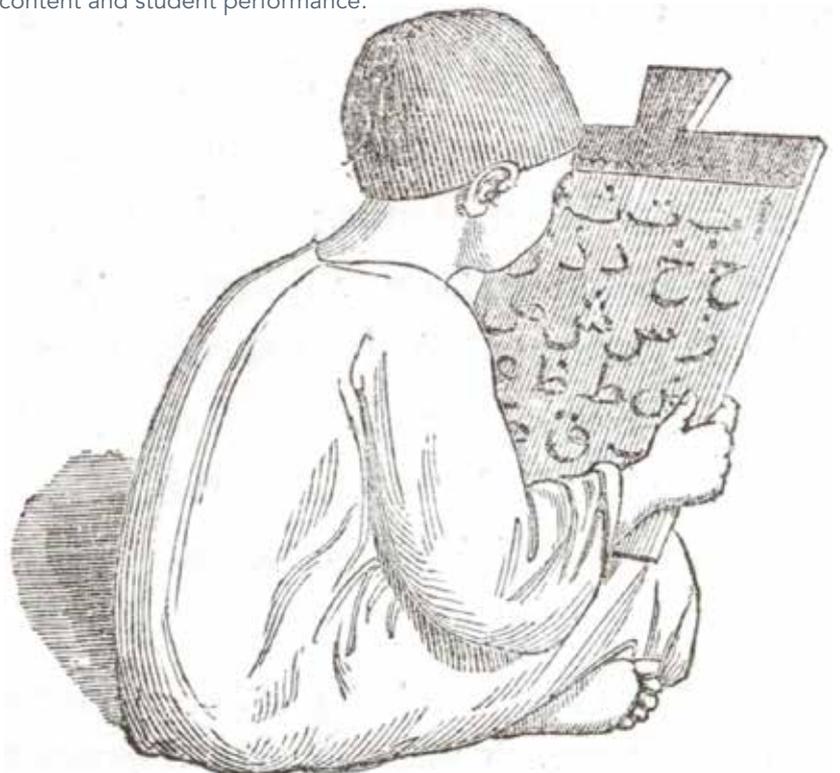
# 1. INTRODUCTION



Education has been at the heart of Qatar's endeavours to transform itself into a nation with a modern knowledge-based economy with a sustainable future for its citizens. The country's position in the world is strengthening and this rapid development is influencing Qatar's decision to align its policies and strategies with the human development pillar of Qatar's National Vision 2030. Qatar's goal is to develop a world-class educational system with the highest international standards, which equips citizens with the knowledge, skills and capabilities for a constantly evolving global landscape.

## 1.1. History

Quranic schools were the first to be established in Qatar. These were religious schools where the Quran was recited, and students inherited fundamental Arabic literacy skills. Arithmetic and basic Arabic were also taught as a supplement. The first primary/elementary school was established in 1952. The Ministry of Education was established in 1956. The education system in Qatar was quite well-developed by the 1980s. With the rapidly increasing oil prices, higher education was needed in order to meet the state's demand for technically schooled students. Tertiary education began in 1973, when the Emir of Qatar issued a decree proclaiming the establishment of Qatar's first national College of Education. After a few years, rapid development of the country made it necessary to expand the College of Education to accommodate new areas of specialization. In 1977, Qatar University was founded with four colleges: Education, Humanities & Social Sciences, Sharia & Law, Islamic Studies and Science. In 1980, the College of Engineering was established, followed by the College of Business & Economics in 1985. K-12 educational reform was implemented in 2002 in which the curriculum was transformed to be outcome-based. It had set clear standards for teaching content and student performance.

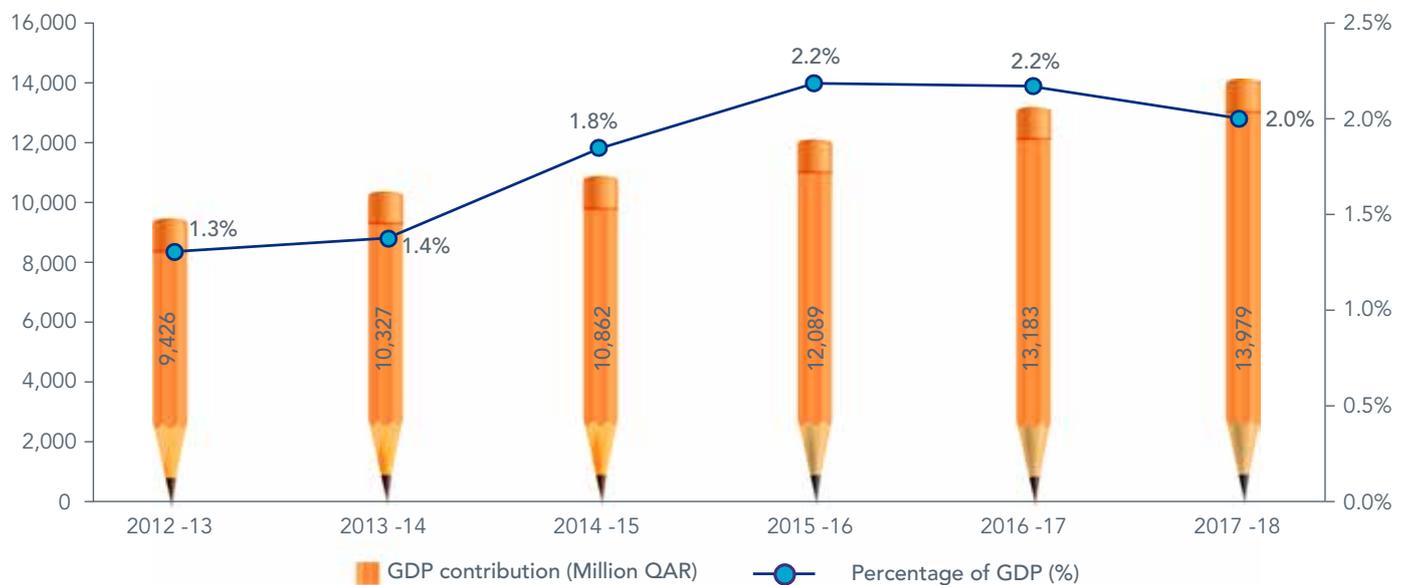




## 1.2. Education Sector Contribution to GDP

The government of Qatar has prioritized the development of the education sector since it is considered vital for achieving economic diversification and fulfilling the vision of becoming an education hub in the region. Efforts are taken to expand the sector, to meet the fast-rising demand from nationals and expatriates. Qatar has also witnessed a growing trend towards private education, which has brought in well reputed international institutions. Such institutions provide diverse curriculums and offer global standards that appeal particularly to the expat population.

Chart 1: Education Sector Contribution to GDP, 2012-13 - 2017-18



Source: Planning and Statistics Authority

In 2017-18, the education sector contributed 2% of Qatar's GDP (1.3% in 2012-13), stimulating the participation of private players and encouraging investment in the education sector, especially from international institutions.

### 1.3. Education Sector Segmentation

The education sector in Qatar can be segmented into four levels namely: Early Childhood, Pre-primary, Primary and Secondary. Early Childhood (also referred to as pre-kindergarten) provide childcare facilities for children up to the age of four, pre-primary and primary/elementary levels focus on basic literacy and numeracy. This level offers formal training in the areas of reading and writing and introduces various other subjects. The secondary level is further divided into lower secondary level (preparatory) and higher secondary level. The four levels of education are explained below:

#### A. Early Childhood

Early Childhood schools are not legally permitted to provide education services but can only provide childcare services for the development of skills and talents of children. They are permitted to admit children only up to the age of four.

#### B. Pre-primary Education

Pre-primary education comprises of the early years of education. Also referred to as kindergarten, this segment includes KG1 and KG2. Students of age group 4-5 years are enrolled in pre-primary.

#### C. Primary Education

Students from the age group of 6 to 11 years attend grades 1 to 6. Primary education is compulsory in Qatar and is free for Qatari nationals at public schools. Both private and public schools offer primary education. The public schools in Qatar follow the Qatari educational curriculum, while the private schools follow curriculum from the various expatriate communities living in the country.

#### D. Preparatory Education

Students who have completed primary education become eligible to enrol for preparatory level of education, which consists of 3 years of education between the age group of 12 to 14 years and grade levels from 7 to 9.

#### E. Secondary Education

Students who have completed preparatory education are eligible to enrol for the secondary level of education. The duration is 3 years for 16 to 18 years age group for grade levels 10 to 12. Secondary education has two streams: academic stream and vocational stream:

- Academic stream: Students preparing for university education
- Vocational stream: Students opting for employment





## 2. SECTOR OVERVIEW

Early Childhood schools are governed by The Ministry of Administrative Development, Labour and Social Affairs (MADLSA) while The Ministry of Education and Higher Education (MEHE) manages and supervises pre-primary (excluding Early Childhood schools) to secondary education. MEHE licenses and gives approvals for opening new schools or educational services centre as well as higher education institutions such as colleges. It also regulates the education policy and plays a vital role in the development and execution of educational reforms in Qatar. Any private schools planning to make any changes (change location, appoint directors, raise their fees, etc.) must obtain written approval from Ministry of Education and Higher Education.

### 2.1. National Vision 2030

In 2008, the country initiated its National Vision 2030, which places education as a foundation for the progress of the Qatari society. As part of its long-term strategy, MEHE plans to provide continued financial and human resources support for educational advancement.

For this, Qatar is planning the following:

- Developing a world-class educational system that meets modern international standards and provide citizens with opportunities to develop their capabilities
- Increasing the number of educational facilities and research opportunities in the coming years
- Building of new Early Childhood, schools, colleges and universities that will help elevate the education level among citizens and residents
- Increasing its allocated budget to education to over 13% of the gross domestic product (GDP)
- Increasing its interest in educating students with special needs mainly through qualifying more schools to become integration centres

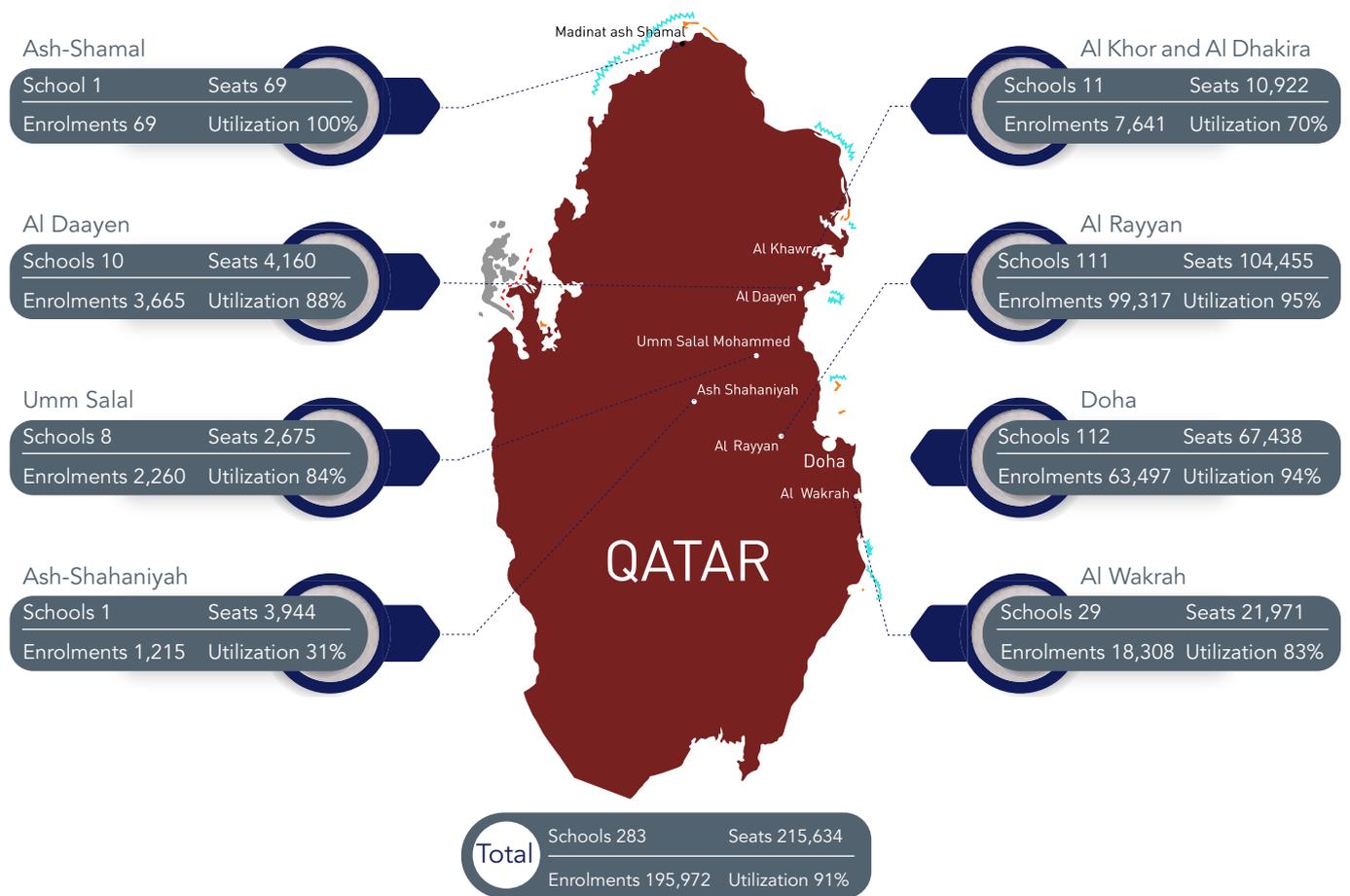
As a part of the Qatar National Vision 2030, Qatar plans to shift to a knowledge-based economy as an enabling element of social and economic progress with sustainable development in all sectors. Qatar has also attracted the attention of private sector participants, which has led to an increase in the number of private schools establishing a base across the country to meet the growing demand across the K-12 segments.

### 2.2. Region wise Distribution of Schools

Education in Qatar is very diverse, as several expatriate communities have their own schools and educational syllabus. However, these schools are operated under the guidelines of MEHE. There are 482 schools spread across Qatar, these include 283 private schools and 199 public schools. Doha and Al Rayyan are popular municipalities in which most of the public and private schools are located. Doha has about 112 private

schools with total seating capacity of 67,438 and total student enrolments of 63,497 in 2018-19, indicating a capacity utilization of 94%. There are 111 private schools in Al Rayyan with total seating capacity of 104,455 and total student enrolments of 99,317 in 2018-19, indicating a capacity utilization of 95%.

Figure 1: Region-wise Distribution of Private Schools



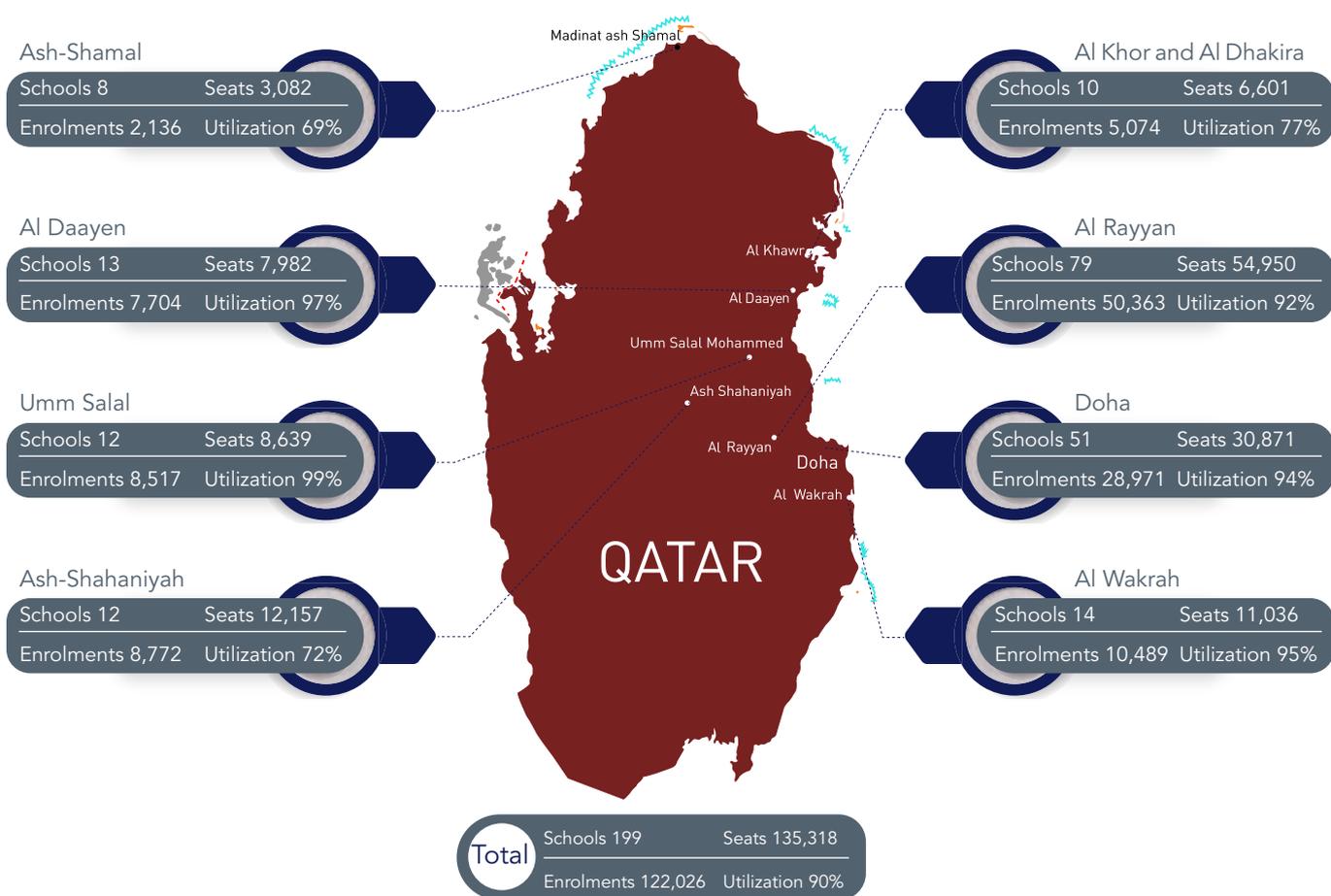
Location	Al Rayyan	Doha	Umm Salal	Al Daayen	Al Wakrah	Al Khor and Al Dhakira	Ash-Shamal	Ash-Shahaniyah	Total Total
Schools	111	112	8	10	29	11	1	1	283
Seats	104,455	67,438	2,675	4,160	21,971	10,922	69	3,944	215,634
Enrolments	99,317	63,497	2,260	3,665	18,308	7,641	69	1,215	195,972
Utilization	95%	94%	84%	88%	83%	70%	100%	31%	91%

Source: The Ministry of Education and Higher Education (MEHE)



Qatar has about 2.79 million inhabitants as of March 2020, majority of them live in the capital city of Doha and in Al Rayyan. Expat children tend to attend private international schools in Doha, since most of the expats work and live in the capital city. Several schools have shifted their base from Doha to Al Rayyan as a result of lower operating costs and closer proximity to Qatari nationals living in this municipality. A few international private schools are based in Al Khor, offering curriculums such as Indian, Canadian, Swiss, Qatari National and Iranian followed by British and American curriculum. Al Wakrah, located close to Doha, is characterized by the presence of a substantial number of expat population that live in this municipality and commute to their workplace in the city of Doha. Hence, this municipality has several private international schools that provide British, Indian and American curriculums.

Figure 2: Region-wise Distribution of Public Schools



Location	Al Rayyan	Doha	Umm Salal	Al Daayen	Al Wakrah	Al Khor and Al Dhakira	Ash-Shamal	Ash-Shahaniyah	Total
Schools	79	51	12	13	14	10	8	12	199
Seats	54,950	30,871	8,639	7,982	11,036	6,601	3,082	12,157	135,318
Enrolments	50,363	28,971	8,517	7,704	10,489	5,074	2,136	8,772	122,026
Utilization	92%	94%	99%	97%	95%	77%	69%	72%	90%

Source: The Ministry of Education and Higher Education

There are 79 public schools in Al Rayyan with total seating capacity of 54,950 and total student enrolments of 50,363 in 2018-19, indicating a capacity utilization of 92%. There are 51 private schools in Doha with total seating capacity of 30,871 and total student enrolments of 28,971 in 2018-19, indicating a capacity utilization of 94%. Public schools in Qatar receive government funding and provide free tuition to all eligible residents. Most students are Qatari, although expats might be admitted in public schools in certain cases. The Ministry of Education and Higher Education oversees all schools in the country and as a result, state schools in Qatar generally provide good quality education. Education City, which is an initiative, founded by Qatar Foundation for Education, Science and Community Development is based in Al Rayyan operating 11 schools and 9 universities. Public schools are divided by gender, while private schools are co-educational or divided by gender in upper years. The school year in Qatar is from early September to the third week of June and is divided into two terms.

### 2.3. Ranking of Qatar's Quality Education

As per the 2017-2018 World Economic Forum's (WEF) Global Competitiveness Report, Qatar is ranked 5th globally for its quality of higher education and training, 10th for quality of primary education, and 6th for the quality of math and science education. The country continues to remain the highest performer in the fields of primary and higher education segments among GCC nations.

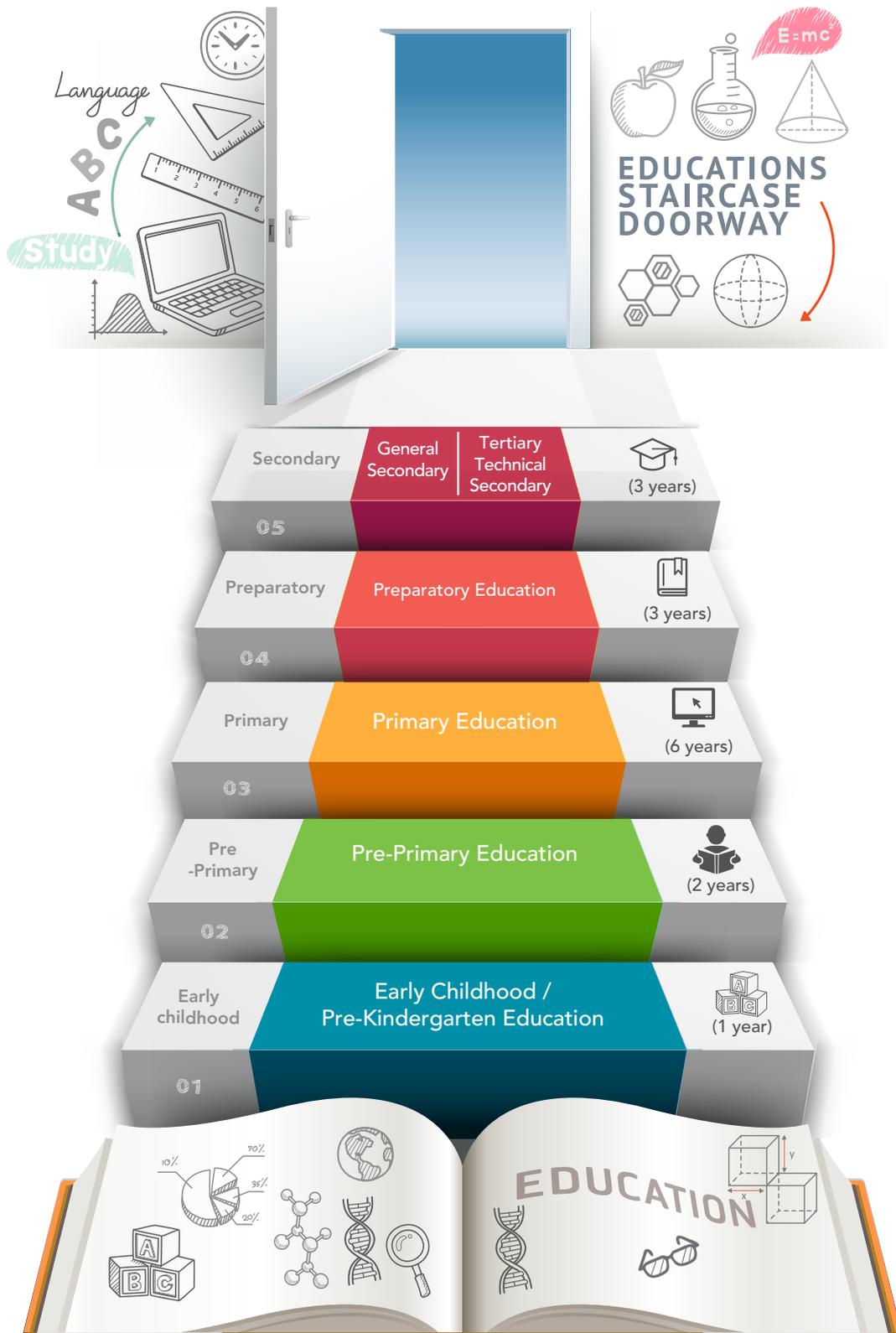
Table 1: Global Rating for Quality of Education

Global Rating for Quality of Education						
Parameters	Qatar	KSA	UAE	Oman	Kuwait	Bahrain
Quality of primary education	10	63	16	78	104	34
Quality of the education system (higher education and training)	5	41	12	75	89	24
Quality of math and science education	6	63	13	84	106	31
Quality of management schools	7	52	15	116	111	34
Internet access in schools	19	57	13	79	88	36
Availability of specialized training services	22	67	24	113	121	36
Extent of staff training	27	63	15	48	86	28

Source: The Global Competitiveness Report 2017-2018 – WEF

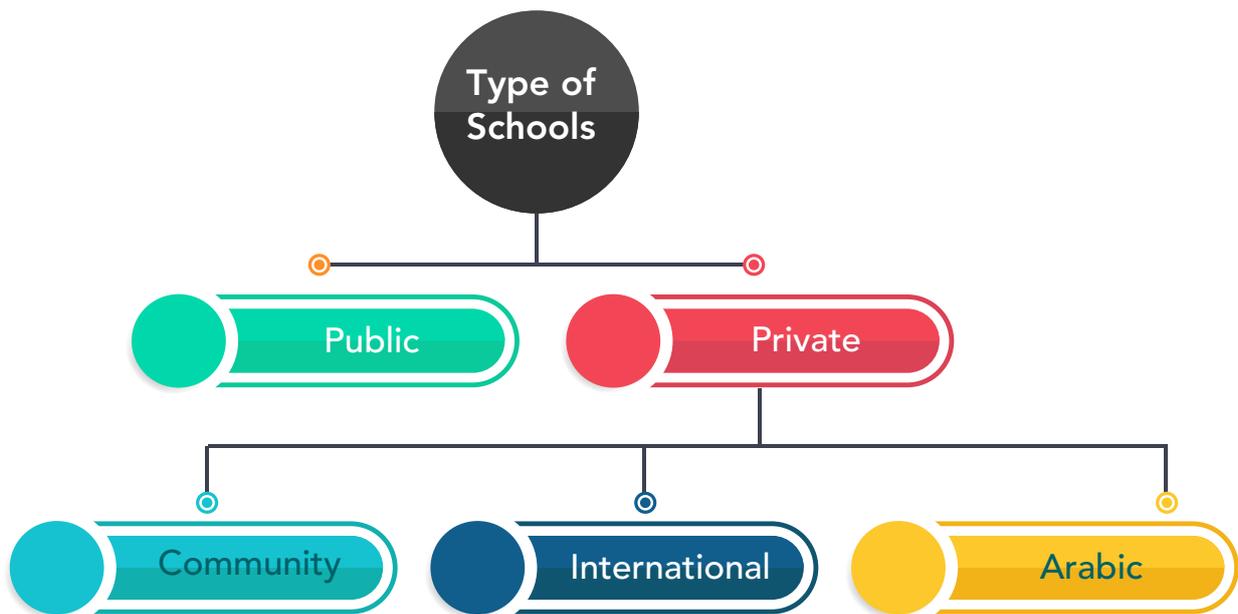


Figure 3: Education System in Qatar



## 2.4. Types of Schools

Figure 4: Distribution of Type of Schools



**Public Schools:** Public schools are state-funded schools, recruitment of teachers and staff is done centrally. The amount of funding allocated to each public school depends on the number of teachers and students. Public schools are free for Qatari citizens. As of 2010, all public schools have been converted to public schools<sup>1</sup>. The Ministry of Education & Higher Education (MEHE) prescribes the curriculum in public schools. Mandatory subjects include Arabic, English, Mathematics, Islamic Studies and Science.

**Private Schools:** The private education sector in Qatar comprises a huge selection of schools from kindergarten to Grade 12 with different languages and curricula. Private schools operate either as commercial establishments or non-profit community schools sponsored by their embassies. Tuition fees may vary significantly from school to school. Schools are free to set their own curricula but must include Arabic, History and Islamic subjects. Many foreign schools base their curricula on the standards of their home countries. However, all schools are required to meet the standards of the Qatar National School Accreditation system, as monitored by the Ministry of Education and Higher Education's Evaluation Institute. These private schools can be further grouped as:

- **International Schools:** The school's choice of curriculum usually reflects its affiliated home country. Popular curriculum in Qatar are American, British, IB curriculums, Indian (CBSE), Canadian, French, Pakistani etc.
- **Community Schools:** These schools are established either by a community of people living in an area or by large companies for their employee's children to avail the education of their native country. Some of the community schools established in Qatar include Tunisian, Syrian, Filipino, Sudanese, Lebanese, Sri Lankan, etc.
- **Qatari Private Schools:** Qatari Private schools are those which operate either as commercial establishments or non-profit community schools that implement 'Qatar National Curriculum Standards' in all subject areas. These schools are committed to apply all the policies used in the public schools related to Qatar curriculum standards for all subject areas. Tuition fees may vary significantly from school to school. These schools are also required to teach three compulsory subjects: Islamic Studies (in Arabic), Arabic, Qatari history (in Arabic).

<sup>1</sup>Qatar Official e-Government Portal, Hukoomi



## 2.5. Education Voucher Scheme (EVS)

The Educational Voucher Scheme (2012) is available to all Qatari students enrolled in the schools selected by the Ministry of Education & Higher Education. The voucher system allows Qatari students to seek education in private schools through government support. The scheme is to encourage Qatari families to enrol their children in private schools, mainly to improve the quality of education in Qatar. The system will also enhance the opportunities of excellence for students and shall raise the level of competition among schools. The educational system aims to build an integrated system that achieves the principles of diversity and choice between schools by providing quality education. The voucher system covers both public and private schools that join the system following the ministry standards.

Educational vouchers are the sum of money granted by the State to cover all or part of the tuition fees in the schools. It covers student's tuition fees up to a maximum of twenty-eight thousand (28,000) Riyals per academic year for all stages. The educational vouchers are payable to the schools for the Qatari children.

As per the Ministry of Education & Higher Education, in 2017, there were 24,592 Qatari students benefiting from the school vouchers within 78 schools. Currently, there are 99 schools covered under EVS benefitting approximately 20,000 students.

## 2.6. Tuition Fees

The Education system has every level of education, from elementary to tertiary and it has one of the best global educational courses. Qatar built an Education city for itself, a campus comprising of many local branches of internationally renowned colleges and universities. Many students choose to study in Qatar because of its high standard of education and its affordable tuition fees.<sup>2</sup> Many International schools have spread their operations in Qatar which has also upgraded the presence of private education institutions in the country. Tuition fees are payable prior to the start of each academic semester. Table 2 showcases the average annual tuition fees charged by private schools based on curriculums at different educational levels. Tuition fees vary across different schools and would depend on several factors ranging from the location of the school, additional services provided and the school infrastructure.

Table 2: Average Tuition Fees Range by Curriculum

Average Tuition Fees Range by Curriculum			
Curriculum	Pre-primary School (QAR)	Primary School (QAR)	Secondary School (QAR)
British	12,000 - 46,000	19,000 - 53,000	32,000 - 70,000
IB	34,000 - 55,000	39,000 - 65,000	42,000 - 74,000
American	19,000 - 35,000	29,000 - 58,000	51,000 - 75,000
Indian	4,000 - 9,000	4,800 - 11,000	8,000 - 16,000

Source: Schools Websites

<sup>2</sup><https://worldscholarshipforum.com/>



## 2.7. Nationality of Students in Public and Private Schools

The Education system in Qatar has a mixed set of student population which includes Qatari and Non-Qatari students. In Public schools the percentage split of Qatari students is high (54%) as compared to that of Non-Qatari students (46%) during 2018-19. In Private schools the percentage of Non-Qatari students is significantly high (81%) as compared to Qatari students (19%). Qatari female enrolments are higher in Public schools (34,925 female students), while Non- Qatari Male enrolments are high in Private schools (86,211 male students).

Chart 2: Percentage Split of Students by Type of School, 2018-19



Source: Team Analysis based on data from MEHE and PSA

Table 3: Gender-wise Distribution of Students by Type of School, 2018-19

Gender-wise Distribution of Students by Type of School, 2018-19						
Students	Public Schools			Private Schools		
	Male	Females	Total	Male	Females	Total
Qatari	53.2%	55.2%	<b>54.3%</b>	20.7%	17.4%	<b>19.1%</b>
Non-Qatari	46.8%	44.8%	<b>45.7%</b>	79.3%	82.6%	<b>80.9%</b>

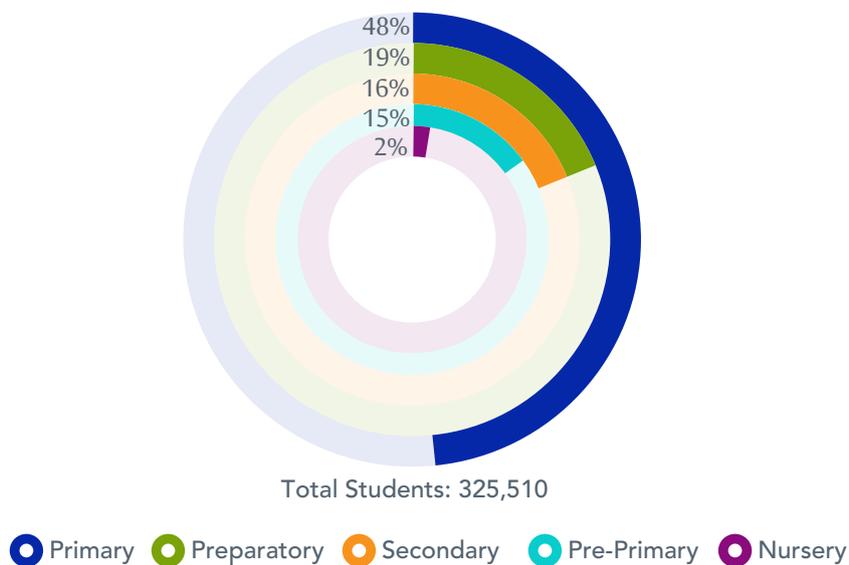
Source: Team Analysis based on data from MEHE and PSA



## 2.8. Total Student Population by Education levels

The education sector in Qatar is diverse, with several schools providing a variety of curriculums at different educational levels. Qatar's education levels are split into 5 categories (Early Childhood, pre-primary, primary, preparatory and secondary). According to the Ministry of Education and Higher Education, in 2018-19, a total of 325,510 students enrolled for public and private schools in Qatar representing a growth of 3.1% over the previous year. The primary level has the highest number of students (48%) followed by preparatory (18%), secondary (16%), pre-primary (15%) and Early Childhood (3%).

Chart 3: Student Population Based on Educational Levels, 2018-19



Source: Team Analysis based on data from MEHE

Schools in Qatar are further bifurcated into two categories: public schools and Private schools. The number of international schools in Qatar has been growing at a steady pace in line with the development of the country and the growth in expat population. Private schools have a higher number of student enrolments (203,484) as compared to Public schools (122,026) due to a larger base population of expats as well as the choice of curriculum provided at private schools. Public schools have a higher percentage of females while private schools have a higher percentage of males.



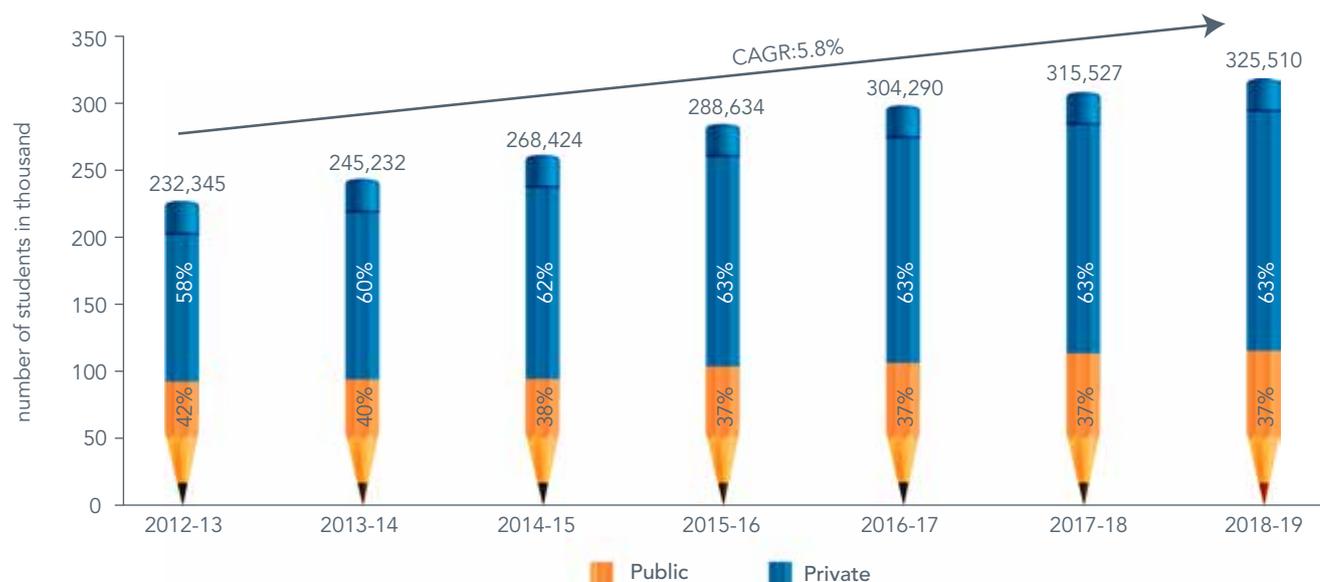
Table 4: Student Population Based on Educational Level, Gender and Type, 2018-19

Student Population Based on Educational Level, Gender and Type, 2018-19						
Students	Public Schools			Private Schools		
	Male	Females	Total	Male	Females	Total
Early Childhood	-	-	-	2%	1.7%	3.7%
Pre-Primary	3.5%	3.8%	7.3%	9.6%	9.9%	19.5%
Primary	23.3%	23.2%	46.5%	24.4%	24.9%	49.3%
Preparatory	11.6%	11.7%	23.3%	8.1%	7.8%	15.9%
Secondary	11.4%	11.5%	22.9%	6%	5.6%	11.6%
<b>Total</b>	<b>58,799</b>	<b>63,227</b>	<b>122,026</b>	<b>107,917</b>	<b>95,567</b>	<b>203,484</b>

Source: Team Analysis based on data from MEHE and PSA

Total student enrolment within all schools in Qatar grew from 232,345 in 2012-13 to 325,510 in 2018-19, at a CAGR of 5.8% during this period. Private school students grew at a faster pace at a CAGR of 7% while public school students grew at a CAGR of 3.9% during this period.

Chart 4: Student's Population by Type of School, 2012-13 - 2018-19



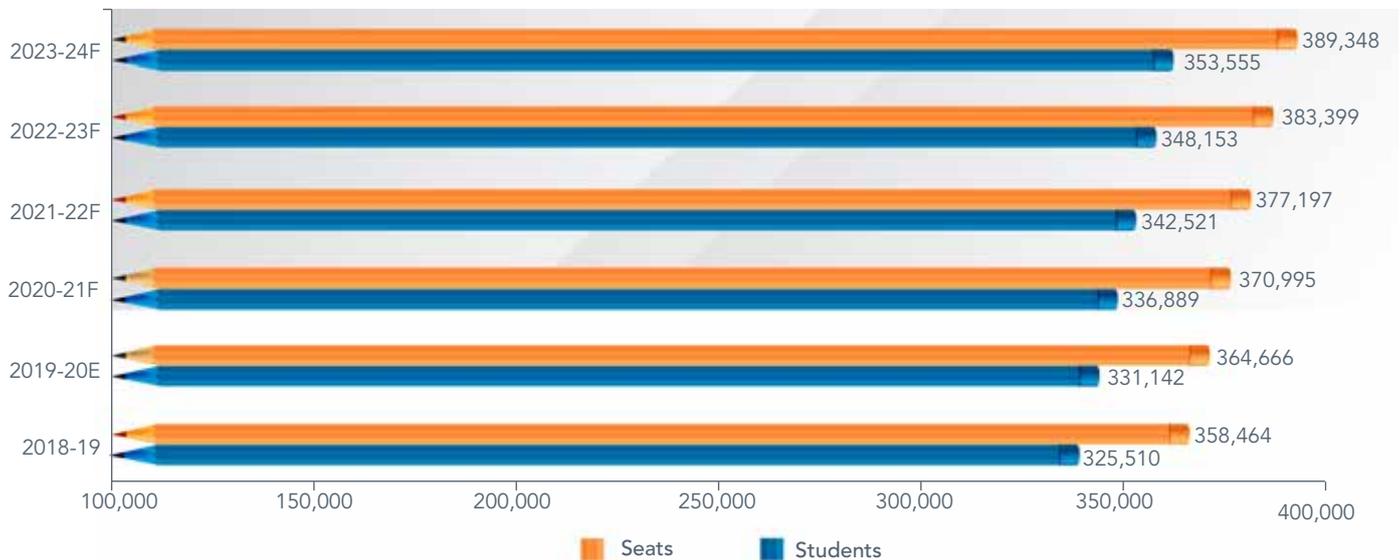
Source: Team Analysis based on data from MEHE



## 2.9. Demand and Supply Analysis

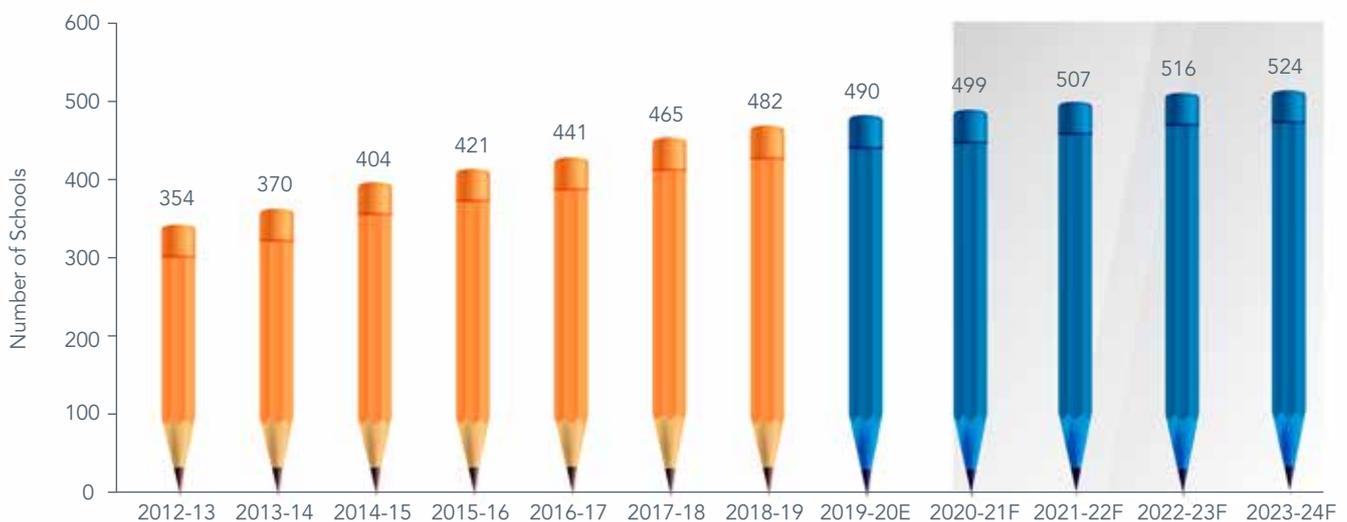
The total number of students is estimated to reach 353,555 in 2023-24 from 325,510 in 2018-19 growing at a CAGR of 1.7%. The total number of seats is estimated to grow to 389,348 seats in 2023-24 from 358,464 seats in 2018-19, thus indicating an excess capacity of 35,793 seats in 2023-24. The number of students is determined based on population growth by age group (World Bank population projections) estimated for Qatar. The number of seats is estimated based on the historic trend of student population to total population ratio. This student population ratio multiplied by the projected total population determines the total seats for 2019-20 to 2023-24.

**Chart 5: Forecast - Total Seats and Student's Enrolments, 2018-19 - 2023-24**



Source: Team Analysis based on data from MEHE

**Chart 6: Total Schools Forecast, 2012-13 - 2023-24**



Source: Team Analysis based on data from MEHE

Total number of schools are estimated to grow at a CAGR of 1.7% to reach 524 schools in 2023-24 from 482 schools in 2018-19 (pre-primary, primary, preparatory and secondary separate). The influx of expatriates, the entry of private players, the introduction of international reputed educational institutions and the growing importance given to education are the key drivers of growth. As per student population growth estimates, Qatar would need 42 new schools by 2023-24. In 2019, MEHE received 101 applications for setting up new schools for various educational grades across Qatar between 2020 and 2023 (see Section 2.11, Table 6). Historically, not all new school applications are approved by the ministry due to stringent qualification criteria and requirements that need to be fulfilled by applicants. However, if all applications get approved during 2020, it would indicate a surplus amount of schools that would operate in the sector.

**Table 5: Number of Private Schools by Location & Curriculum, 2018-19**

Number of Private Schools by Location & Curriculum, 2018-19							
Location	British	IB	American	Indian	National Standard	Others	Total
Al Daayen	4%	11%	0%	0%	6%	5%	10
Al Khor and Al Dhakira	3%	0%	6%	8%	6%	0%	11
Al Rayyan	39%	44%	23%	28%	39%	63%	111
Al Wakrah	12%	0%	9%	19%	6%	3%	29
Ash-Shahaniyah	1%	0%	0%	0%	0%	0%	1
Ash-shamal	0%	0%	0%	0%	3%	0%	1
Doha	37%	44%	60%	39%	39%	30%	112
Umm Salal	4%	0%	3%	6%	0%	0%	8
<b>Total</b>	<b>130</b>	<b>9</b>	<b>35</b>	<b>36</b>	<b>33</b>	<b>40</b>	<b>283</b>

Private schools in Qatar has reached the mark of 283 schools in 2018-19. Out of which 46% of the schools follow British curriculum with majority of schools are in Al Rayyan and Doha municipalities. Similarly, Al Rayyan has the highest number of schools following British, National Standard and Indian curriculum.



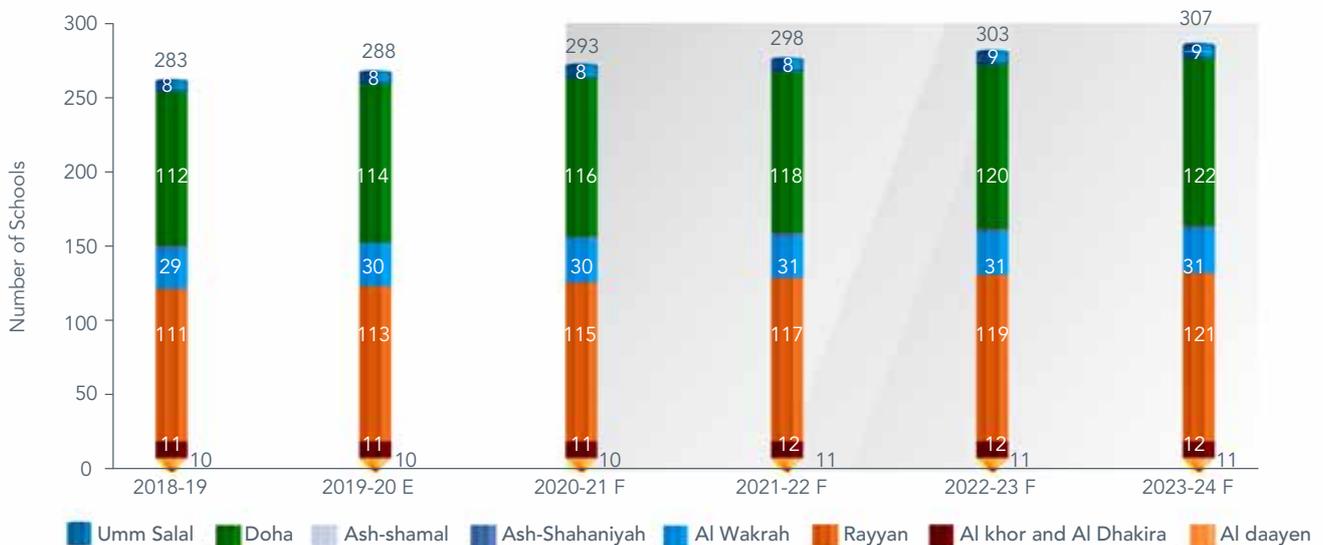
Chart 7: Upcoming Private Schools by Curriculum, 2018-19 – 2023-24



Source: Team Analysis based on data from MEHE

As per the estimates, the total number of private schools will reach 307 in 2023-24, adding 24 schools within the period 2018-19 and 2023-24. British curriculum would have the maximum number of schools (11 schools) added followed by American, Indian, National Standard and Others.

Chart 8: Upcoming Private Schools by Location, 2018-19 – 2023-24



Source: Team Analysis based on data from MEHE

Schools in the municipalities of Doha and Al Rayyan are maximum due to higher population within the municipalities. Opportunities exist for adding British and American schools in Doha and Al Rayyan. As per the estimates, 10 more schools will be added to Doha and 10 more to Al Rayyan by 2023-24. Total private schools likely to reach 307 schools by 2023-24 from 283 schools in 2018-19 growing at a CAGR of 1.7%

## 2.10. Upcoming School Applications

The Ministry of Education and Higher Education has received several applications for setting up new schools in Qatar. About 101 schools have submitted their applications to either set up new schools or expand their existing operations from the academic year 2019 to 2023. The following are the highlights of the number of school applications:

**Table 6: Applications for Upcoming Schools, 2019 to 2023**

Applications for Upcoming Schools, 2019 to 2023					
Upcoming Schools	2019	2020	2021	2022	2023
Total applications received by MEHE	56	8	12	14	11

Source: Team Analysis based on data from MEHE



## 2.11. PEST Analysis

Qatar’s education sector has constantly been expanding to meet the rising demand from nationals and expatriates. However, there are several external elements such as the political and economic conditions that play a vital role in influencing the decisions that are undertaken for strategic planning. The table below outlines the PEST analysis for the educational sector.

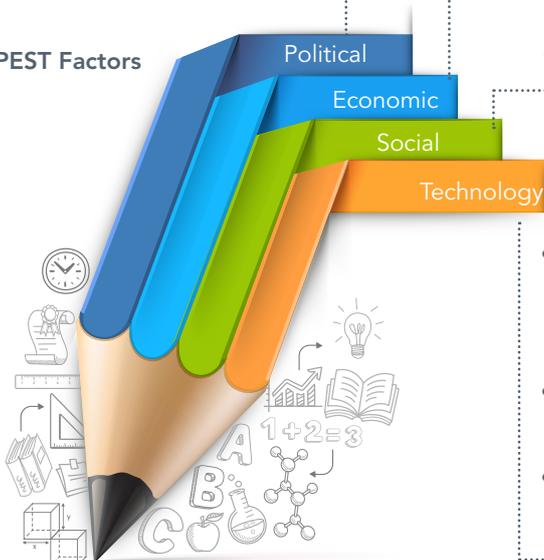
Figure 5: PEST Analysis Qatar’s Education Sector

- Qatar’s political atmosphere and relationship with blockading countries is under pressure which has had a minor impact on the education sector. Students belonging to Qatar as well as the blockading countries are impacted due to mobility restrictions between the countries. It also affected the public/ Arabic Private schools given that textbooks for some subjects were imported from the blocking countries such as KSA and UAE.
- “Qatarization strategy” is designed to increase the number of Qatari nationals in all joint venture industries and government departments. These nationals are required to assume important positions formerly occupied by expatriates and will need the locals to receive the level of education essential to prepare them for those new requirements.

- Qatar’s public expenditures on education represent 3.1% (QAR 22.1 bn) of its GDP.
- The government’s focus on the education sector with a vision of providing world class education has led to sizeable expenditure on modernization of the education system and support infrastructure.

- The demand for education is growing fast in Qatar, leveraged by a population growth at a CAGR of 2.8% during the 2014-2018 period.
- More than 86% of the population of Qatar is comprised of expatriates, creating the need for international schools.
- Qatar is ranked 41st among 189 countries in the Human Development Index (HDI) and is featured under the very high human development category.
- The government is committed to provide quality education, by attracting more foreign schools to setup their campus in Qatar through incentives such as funding and tax breaks. International schools also give the opportunity for expat students to understand Qatari values and culture in a diverse society which is provided as part of the curriculum.

PEST Factors



- To improve the teaching and learning process based on the Qatar Vision 2030, a framework for ICT is designed by MEHE based on the International Standards for ICT subjects as well as having latest technologies. This will benefit the students in overall learning process and will enhance the teaching process as well.
- Qatar continues to modernize its telecommunications and IT infrastructure, with educational institutions rapidly adopting new teaching techniques based on online and cloud-based technology programs.
- E-learning has also set down its roots in the Qatari educational market and is expected to expand rapidly. For example: e-Learning initiatives by MoTC, development of various online courses, e-plans etc



## Conclusion

Qatar's quality of education in higher education is highly recognized, which is supplemented by the emergence of foreign universities that have been well funded and incentivized by the government. The government is making its economy self-reliant and thus, investing heavily in the education sector. This has set the pace and fuelled the growth of private and public educational institutions. MEHE is emphasizing on adoption of international curriculum with a focus on students being taught in English language. A few initiatives from different external environmental factors (social, technological, political etc.) like "Qatarization strategy", increase in public expenditure on education, focus on Qatar Smart Nation program and E-learning setting down its roots in the Qatari educational market lays a foundation stone to increase private participation in the education services sector and expatriates enrolling in the Qatar Education System in the coming years.





## 2.12. SWOT Analysis

Qatar's economy is embedded with diverse strengths that are inclined to attract emerging opportunities which can sustain growth and provide a boost to the education sector. However, the country also faces several weaknesses which hinder positive development. The matrix below presents the SWOT analysis for Qatar's education sector:

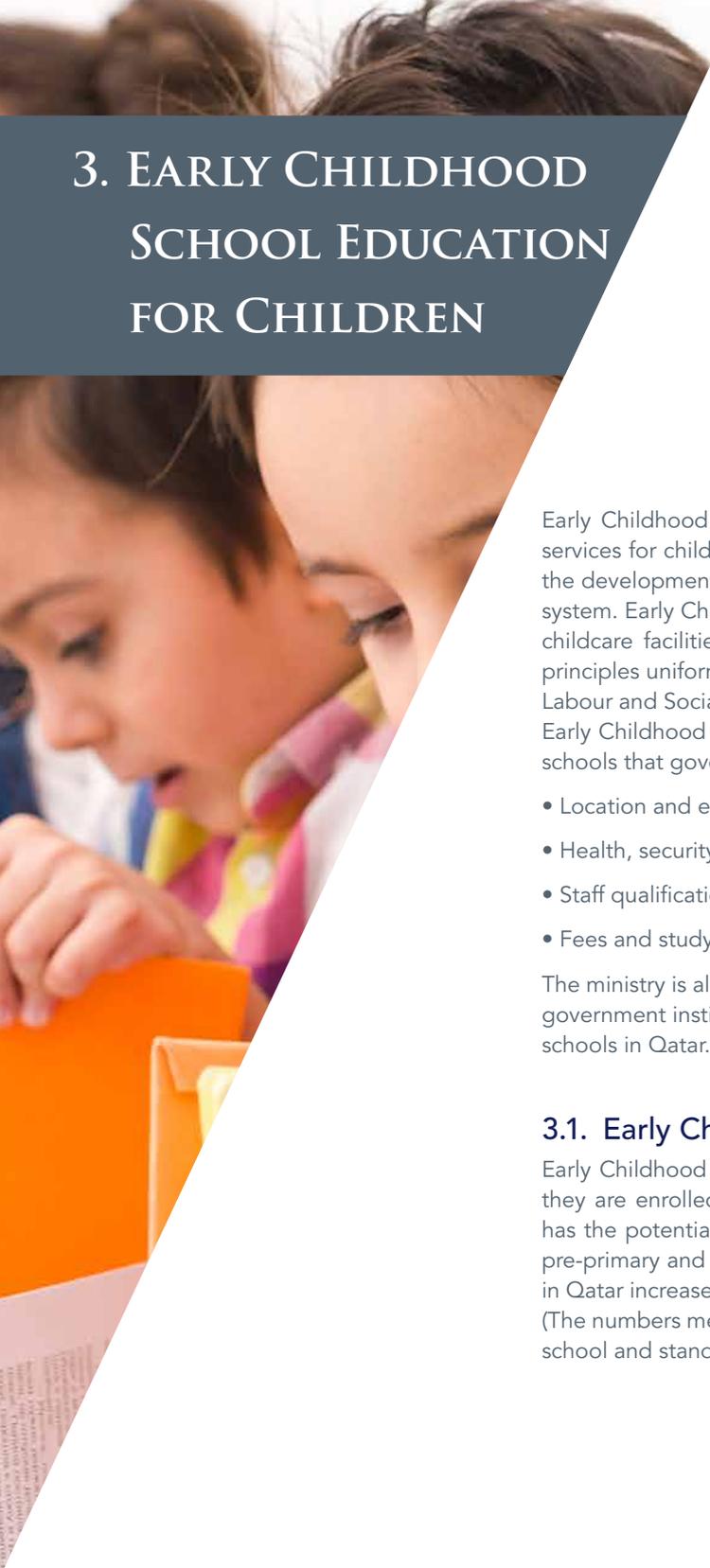
Figure 6: SWOT Analysis – Qatar's Education Sector





## Conclusion

The education sector in Qatar is growing at a rapid pace driven by rising expatriates, emergence of international institutions, rising desire and demand for private education as well as higher studies. The government of Qatar has also taken the initiative of allocating a sizeable annual budget, in accordance with the Qatar National Vision 2030 which focuses on efficient teaching, improving learning outcomes, enhancing curriculums, refining the efficiency and productivity of the education system. However, with increasing growth, the education system in Qatar faces challenges and threats such as increasing competition, high education fees and redundancy in implementing changes to the system which proves to be a drawback in the constant growth within the education sector in Qatar. Please refer to Section 8.2 for a detailed analysis on the key success factors and risks of setting up a school in Qatar.



### 3. EARLY CHILDHOOD SCHOOL EDUCATION FOR CHILDREN

Early Childhood schools in Qatar are responsible for providing integrated care and services for children. Their purpose is to provide them with appropriate conditions for the development of their skills and talents in various fields using a scientific education system. Early Childhood schools are not legally permitted to educate but only provide childcare facilities. Most of the nurseries operating in Qatar follow the educational principles uniform to their home country. The Ministry of Administrative Development, Labour and Social Affairs (MADLSA) is responsible for the control and functioning of all Early Childhood schools in Qatar. The ministry sets out standards for Early Childhood schools that govern several aspects such as:

- Location and educational environment
- Health, security and safety
- Staff qualifications and career level
- Fees and study expenses

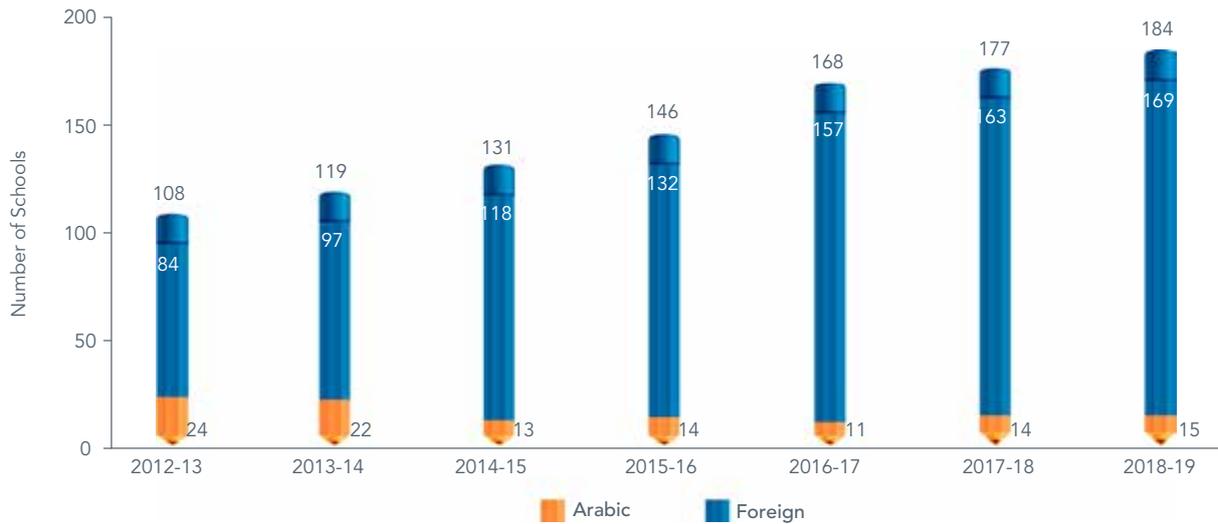
The ministry is also responsible for issuing of licenses that allow government and semi-government institutions as well as individuals and companies to open Early Childhood schools in Qatar.

#### 3.1. Early Childhood Schools Supply Analysis

Early Childhood schools play a vital role in the early development of children before they are enrolled in schools. Improved Early Childhood development in the country has the potential of enhancing their academic performance as they advance towards pre-primary and higher levels of schools later. The number of Early Childhood schools in Qatar increased from 108 in 2012-13 to 184 in 2018-19, growing at a CAGR of 9.3%. (The numbers mentioned within this section include Early Childhood schools within the school and standalone Early Childhood schools).



**Chart 9: Number of Early Childhood Schools, 2012-13 - 2018-19**



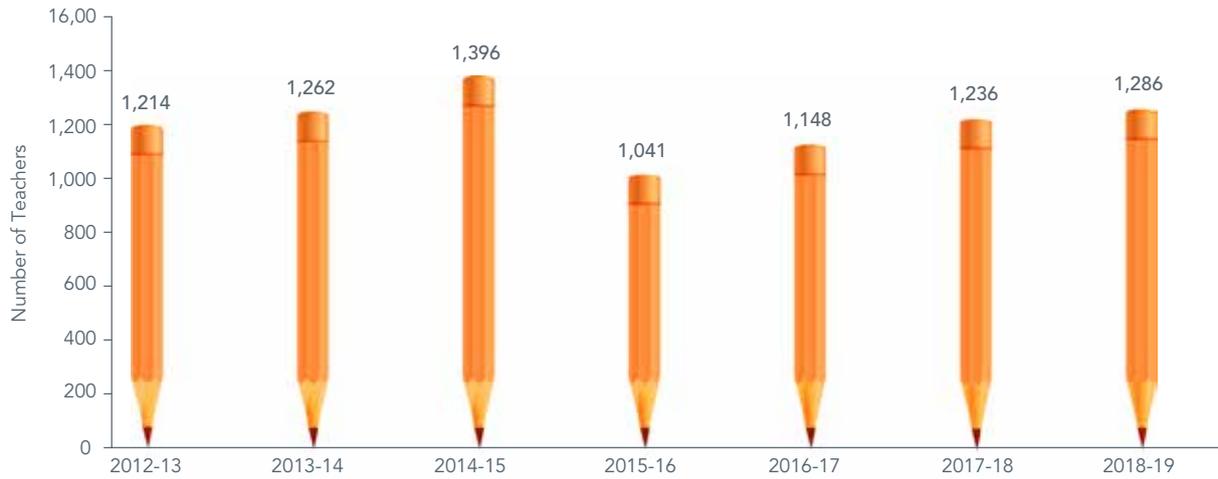
Source: Team Analysis based on PSA Data

Prior to the development of Qatar’s current educational system, the methods of teaching initially followed the intrinsic-nationalistic and cultural traditions of Arabic schools. In order to set international benchmarks and avoid rigidity within the education system, public schools were established. New standards were set to introduce the most effective systems for Qatari students to succeed along international benchmarks.

Development of teachers stressed on improving professionalism through licensing and increased professional development programs. Qatar has become an attractive destination for English speaking professionals due to the opportunities and calibre of work available. Qatar’s market has historically faced a shortage of teachers. Work at Early Childhood schools is strictly limited to women (female teachers). There is a mix of Qatari and expatriate (foreign) teachers depending on the curriculum of the Early Childhood schools. The number of teachers in Early Childhood schools has witnessed a growth from 1,214 teachers in 2012-13 to 1,286 teachers in 2018-19.



Chart 10: Early Childhood School Teachers, 2012-13 - 2018-19



Source: Team Analysis based on PSA Data

Chart 11: Early Childhood - Student to Teacher Ratio, 2012-13 - 2018-19



Source: Team Analysis based on PSA Data

The student teacher ratio declined to 5.8 in 2018-19 from 11.7 in 2012-13.

### 3.2. Early Childhood Schools Demand Analysis

Early Childhood schools are educational institutions designated for the early development of skills and providing care for children up to four years of age. The demand for Early Childhood education is indicated based on the number of student enrolments each year. Early Childhood enrolments have increased at a steady pace from 2014-15 until the present day. The number of male and female enrolments have stabilized during 2015-16 to 2018-19. Males account for 54% of the total enrolment in Early Childhood schools, while females account for 46%.

**Chart 12: Student's Enrolment in Early Childhood by Gender Mix and Nationality, 2012-13 - 2018-19**



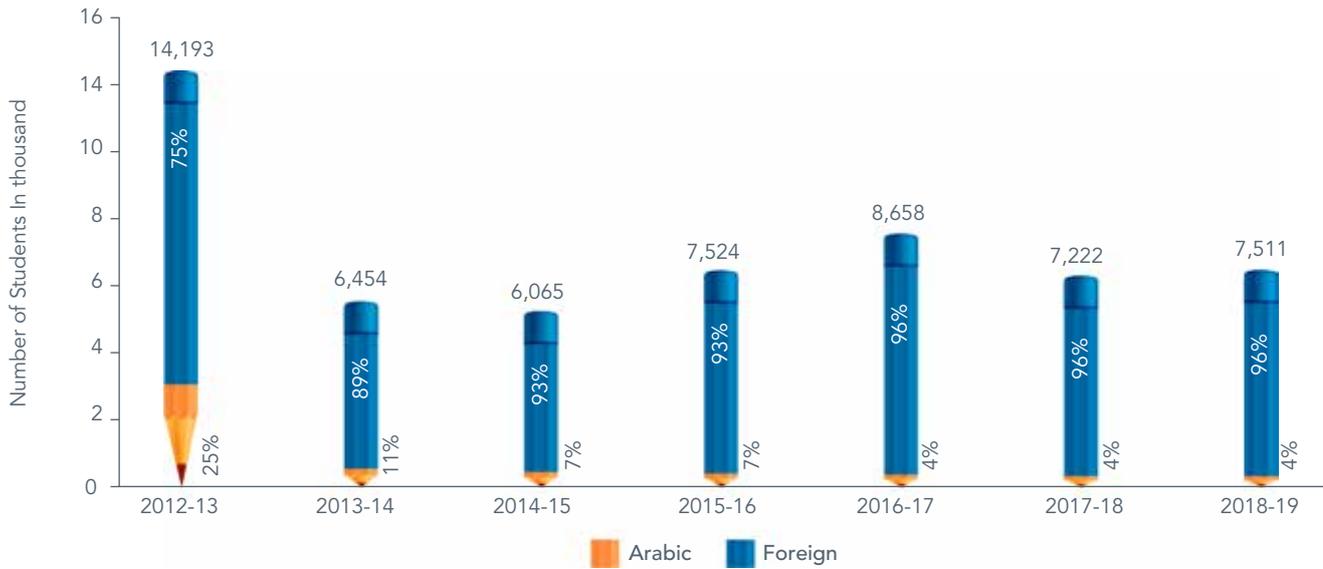
Source: Team Analysis based on PSA Data

During 2012-13, Early Childhood enrolments of non-Qatari students was at its peak, accounting for 75% out of the total student enrolments (14,193), however, this gradually declined to 62% in 2018-19 out of the total enrolments (7,511). Although Early Childhood education is not mandatory in Qatar, most of the pre-primary schools consider a child's Early Childhood school report card as an initial criterion to admit them into the school and hence expat parents prefer to enrol their children in Early Childhood schools. Expat parents often select an Early Childhood school for their children based on the curriculum offered by the Early Childhood, pricing, distance from their residence, reputation and facilities provided by the Early Childhood school.

Qatar's diverse expatriate population focus on selecting educational institutions which follow the educational principles that adhere to their home country. Hence the number of enrolments within foreign Early Childhood schools has been constantly growing, increasing from 89% in 2013-14 to 95% in 2018-19.



Chart 13: Student Enrolment in Early Childhood by Type, 2012-13 - 2018-19



Source: Team Analysis based on PSA Data

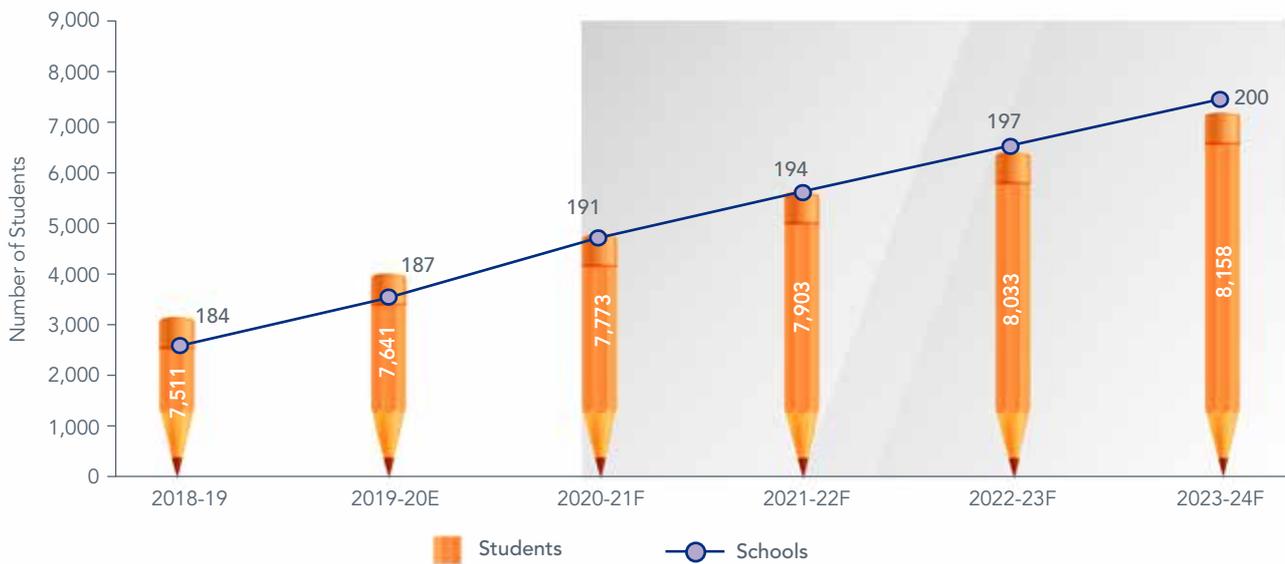
There has been no stable growth trend in enrolments within Early Childhood schools during the past years. Hence, as per interviews with the industry stakeholders, it is estimated that the number of students within Early Childhood schools for 2018-19 grew at 4% compared to the previous year.



### 3.3. Forecast – Total Early Childhood Students and Schools

An increase in intellectual capital in the region and the influx of foreign workers to Qatar has increased the pressure to provide high quality education in the country. The total students in Early Childhood schools are projected to reach 8,158 by 2023-24 from 7,511 in 2018-19 growing at a CAGR of 1.7% annually. In order to cater to this growing demand, more Early Childhood schools are expected to set up operations in the country. The number of Early Childhood schools is projected to reach 200 Early Childhood schools by 2023-24 from 184 in 2018-19, indicating the potential for about 16 new Early Childhood schools in the next five years. The average capacity of 41 students within a school is used to estimate the required number of schools until 2024.

Chart 14: Early Childhood Forecast - Total Students and Schools, 2018-19 - 2023-24



Source: Team Analysis based on PSA and World Bank Data

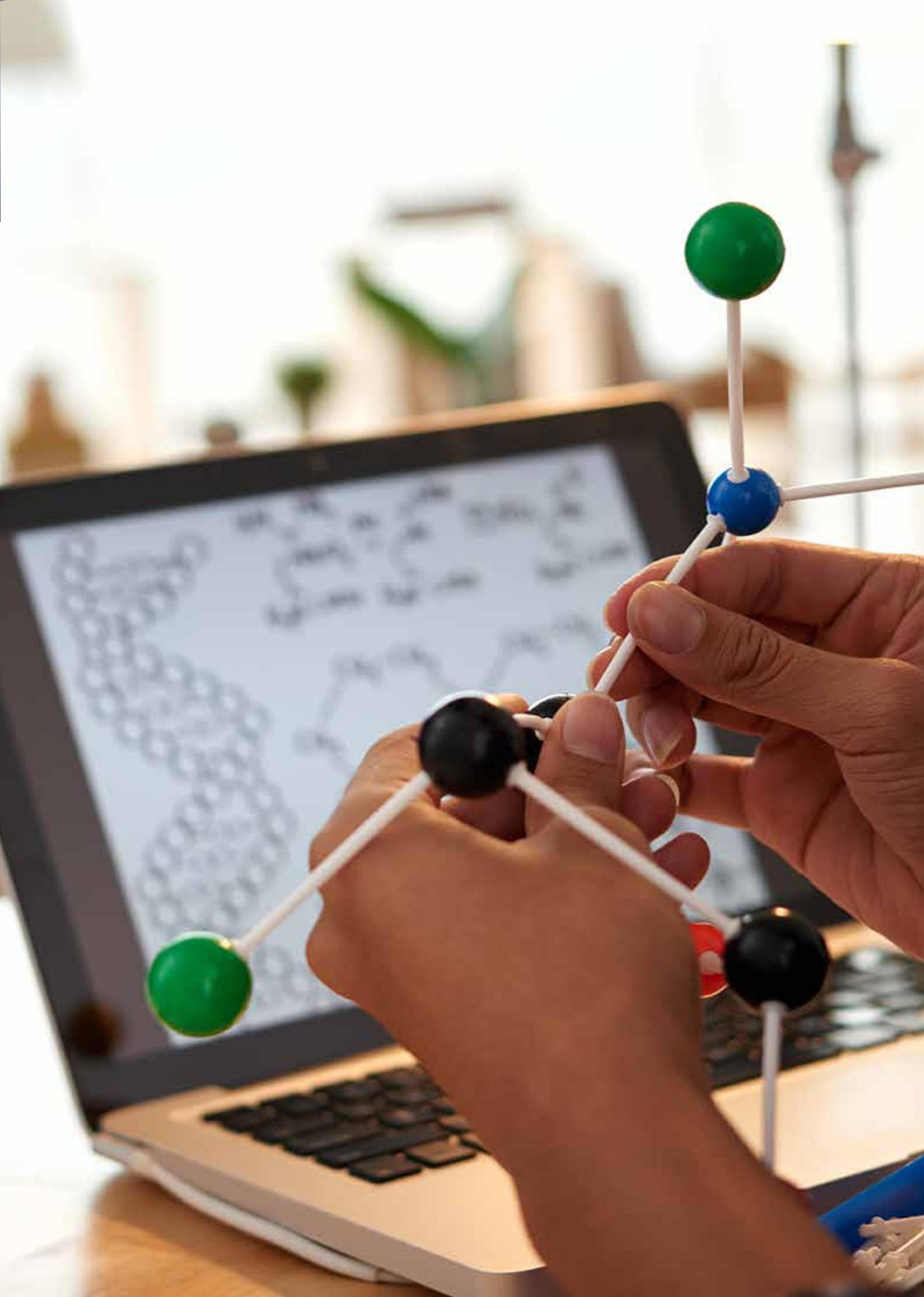
#### Assumptions

Student population projections is determined based on the population estimates as per age group provided by the World Bank, which corresponds to the specific age group of students in each academic year. The average number of students enrolled per school has been used as a benchmark to estimate the number of schools until 2023-24.



### 3.4. Key Takeaways

- Diverse expatriate population has led to a constant growth in Early Childhood school's enrolments which is increasing from 89% in 2013-14 to 95% in 2018-19
- The total students in Early Childhood schools are projected to reach 8,158 by 2023-24 from 7,511 in 2018-19 growing at a CAGR of 1.7% annually
- Standalone Early Childhood schools and Early Childhood schools within schools has seen a growing a CAGR of 9.3% from, 2012-13 to 2018-19
- The number of Early Childhood schools is projected to reach 200 schools by 2023-24 from 184 in 2018-19, indicating the potential for about 16 new schools within the next five years
- Along with increase in number of schools, the number of teachers in Early Childhood schools also has witnessed a growth from 1,214 teachers in 2012-13 to 1,286 teachers in 2018-19
- Early Childhood schools are preferred based on curriculum offered, pricing, distance, reputation and facilities provided all of which will play an important role in the success of newly set up schools





## 4. PRE-PRIMARY SCHOOL EDUCATION FOR CHILDREN



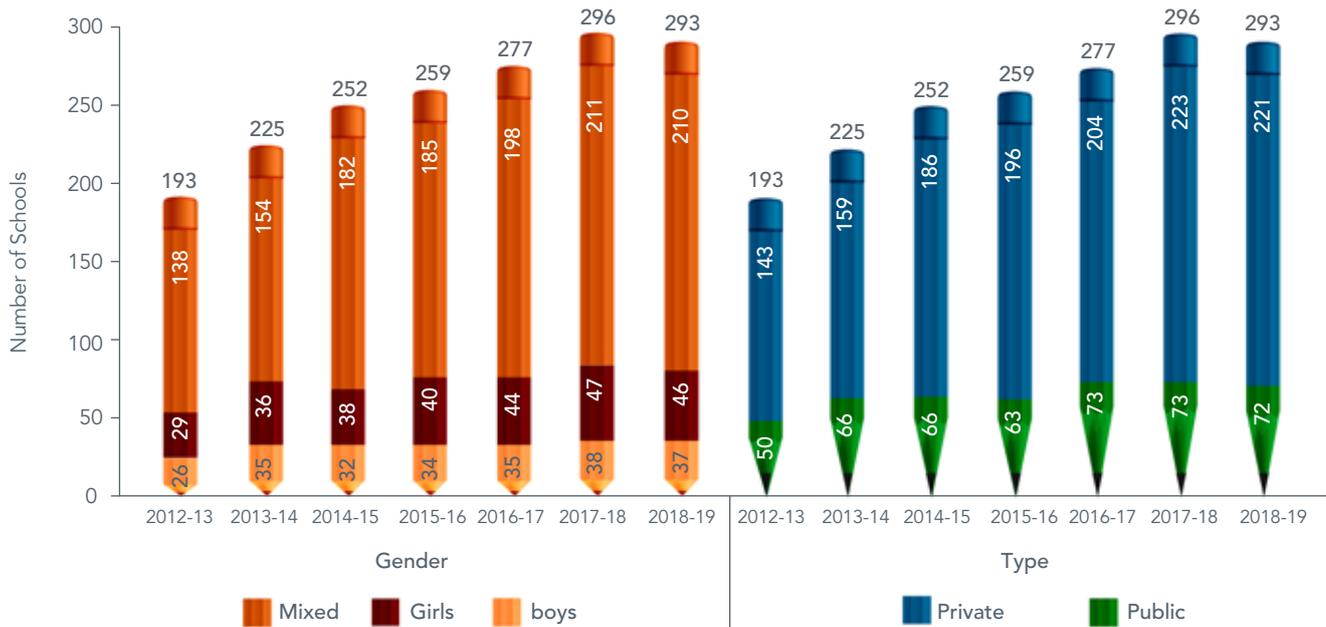
### 4.1. Pre-primary Supply Analysis

A total of 293 schools offering pre-primary education were operational in 2018-19. These include 46 girls-only, 37 boys-only and 210 mixed schools. The number of pre-primary schools grew at a CAGR of 7.42% between 2012-13 and 2018-19. Mixed schools, which are all operated by private players, accounted for a share of about 71% of all pre-primary schools during the past 7 years.





Chart 15: Total Number of Pre-primary Schools by Gender and Type, 2012-13 - 2018-19



Source: Team Analysis based on data from MEHE

Rising population of both Qatari nationals and expatriates have fuelled the growth in demand for public as well as private schools in Qatar. Private sector has a larger market share contributing 75% of the total schools in 2018-19. The growth of schools within private segment is increasing at a faster pace compared to the growth within public schools.

According to the National Qualifications Framework in Qatar, all pre-primary teachers should have an undergraduate degree or a post-graduate qualification, and the position is remunerated in an appropriate manner to attract well-qualified teachers.

Pre-primary schools have only female teachers, due to a law, which permits only female staff to work in these schools. There is a mix of Qatari and expatriate (foreign) teachers in public pre-primary schools, however, private pre-primary schools had only expatriate teachers. Since 2013-14, the share of Qatari teachers had shown faster growth rate in comparison to non-Qatari teachers. In 2018-19, the total number of teachers reached 3,502 of which 79% were non-Qatari and 21% were Qatari teachers.



Chart 16: Pre-primary Teachers by Nationality - Public and Private, 2012-13 - 2018-19

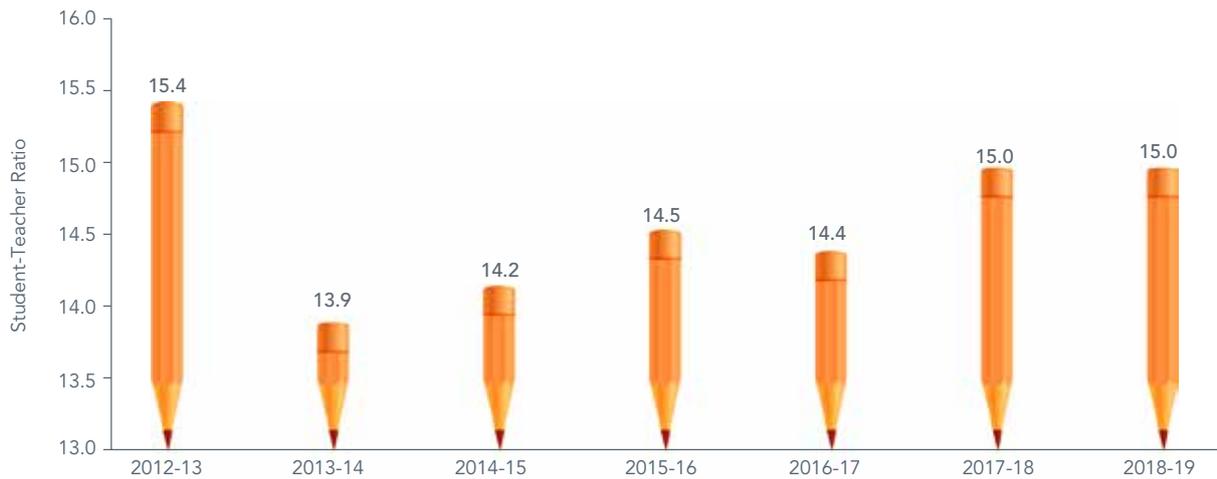


Source: Team Analysis based on data from MEHE

The teacher population projection for 2018-19 has been calculated using the past average Student to Teacher ratio of 15:1. The number of students for 2018-19 has been obtained from the Ministry of Education and Higher Education.



Chart 17: Pre-primary: Student to Teacher Ratio, Private and Public, 2012-13 - 2018-19



Source: Team Analysis based on data from MEHE

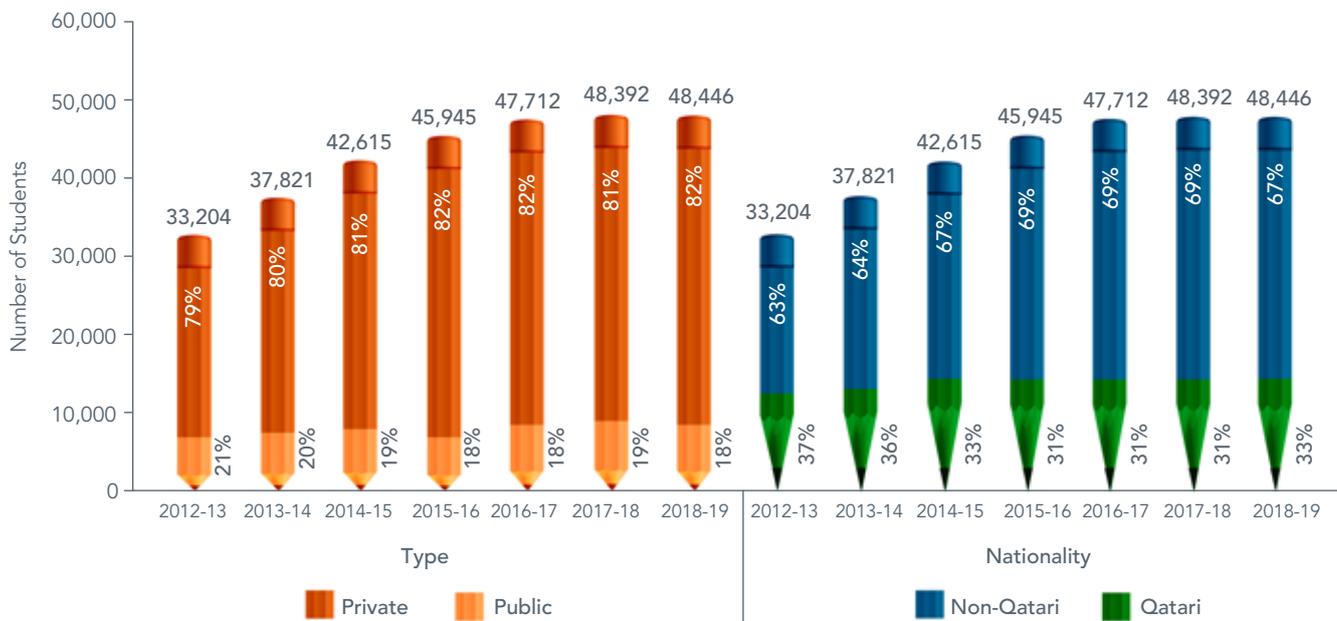
Initially pre-primary schools in Qatar faced a shortage of teachers, leaving the student teacher ratio as high as 21 students per teacher back in the year 2000. However, the ratio has been steadily improving over the years, with the Government implementing certain steps such as hiring teachers from other countries. In 2013-14, the student teacher ratio consequently reduced to 13.9 and has stabilized in the range of 14 to 15 between 2014-15 and 2018-19.



## 4.2. Pre-primary Schools Demand Analysis

In 2017, the economic blockade on Qatar had an adverse effect on opportunities for regional academic collaboration. However, the impact on the overall sector was limited, with a slight dip in student enrolment and staff retention in some private schools. Hence, from 2017 to 2019 student enrolment has increased at a slow but stable CAGR of 0.8%. Pre-primary school enrolments have registered a strong CAGR of 6.5% between 2012-13 and 2018-19, with enrolments in private schools growing faster (7.1% CAGR) than public school enrolments (4.1% CAGR). Growth in expat population in Qatar was the major driving force for rise in demand for pre-primary education.

Chart 18: Student's Enrolment in Pre-primary by Type & Nationality, 2012-13 - 2018-19



Source: Team Analysis based on data from MEHE

Between 2012-13 and 2018-19, non-Qatari student enrolments increased at a CAGR of 7.8% whereas Qatari students increased at a CAGR of 4.1%. In 2018-19, the enrolments of non-Qatari students marginally declined over the previous year on account of mobility issues arising out of the blockade.



### 4.3. Gross Enrolment Ratio

Gross enrolment ratio (GER) is defined as the percentage of total enrolled children of all ages divided by the total number of children in the official school age group. Since 2012-13, there has been a gradual increase in the enrolment ratio. Student's enrolment has increased significantly between 2012-13 and 2018-19, mainly due to the growing awareness among Qatari nationals about the importance of pre-primary education. Qatar's pre-primary gross enrolment rate increased from 75% in 2012-13 to 88% in 2014-15 under the framework of the National Development Strategy 2011-16. In 2016, GER decreased to 84% and stabilized at this rate until 2018. In 2019, GER increased to 87% due to the stabilization of economic conditions after the blockade.

Chart 19: Gross Enrolment Ratio in Pre-primary Schools, 2012-13 - 2018-19



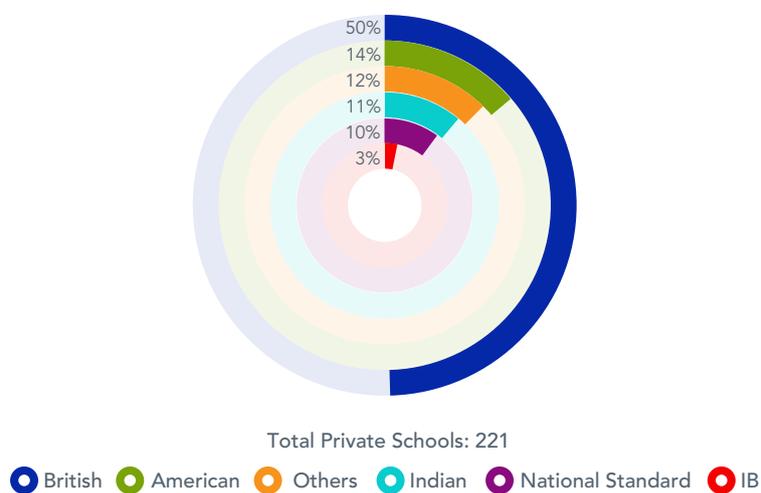
Source: Team Analysis



#### 4.4. Curriculum Analysis of Private Pre-Primary Schools

A total 221 Private Pre-Primary schools (standalone and multi-level education) operate in Qatar. British curriculum schools are currently preferred by expats. Almost half of the private schools provide British curriculum (50%) followed by American curriculum with a 14% share. Indian curriculum currently holds 11% share, followed by National curriculum with 10% and International Baccalaureate (IB) with 3% share. Other curriculums like German, Iranian, Bangladesh, Turkish, Canadian, Finnish, etc. together accounted for 12% share.

Chart 20: Private Pre-Primary Schools - Curriculum Analysis, 2018-19

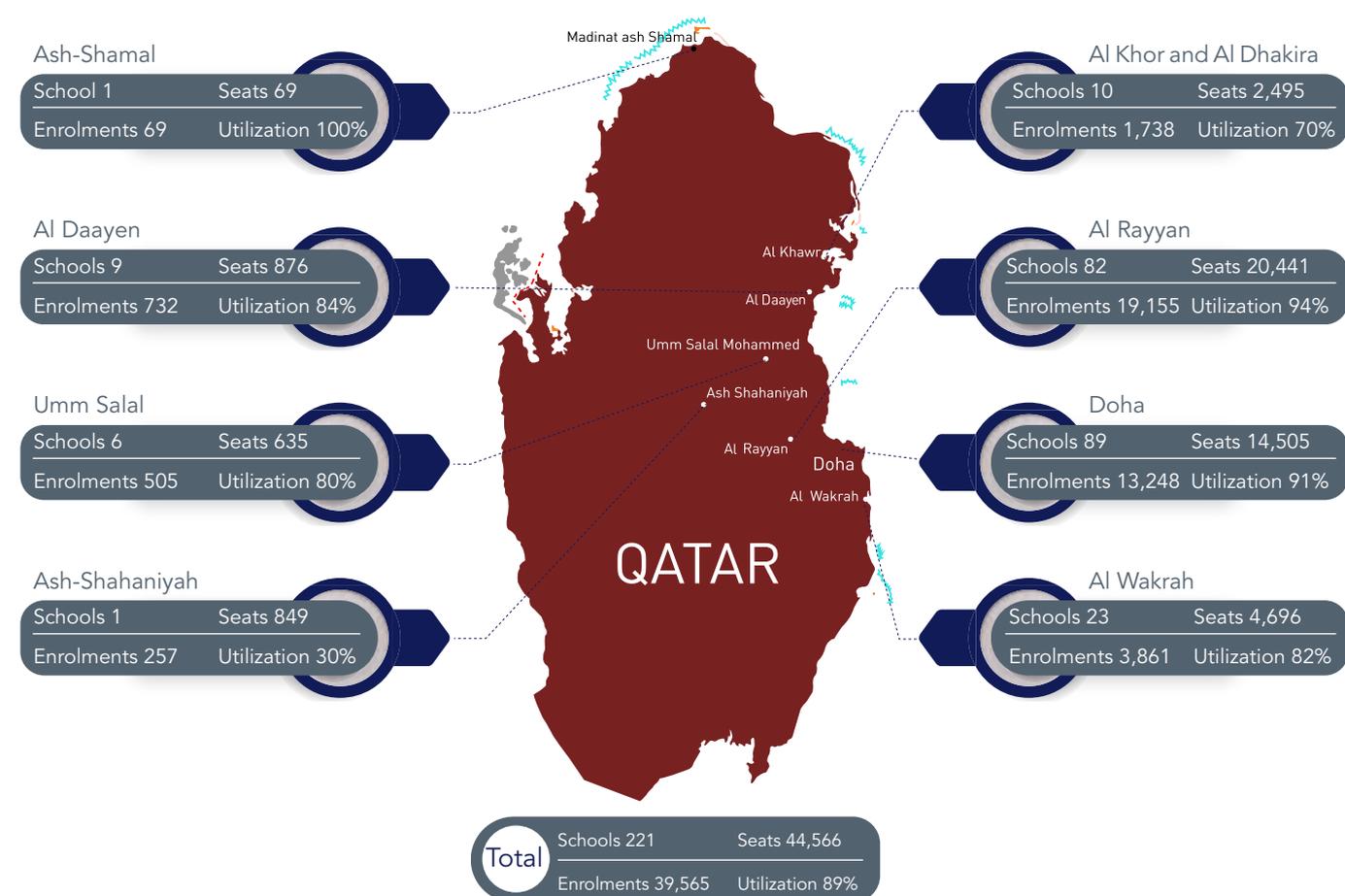


Source: Team Analysis based on data from MEHE

## 4.5. Location Analysis of Pre-Primary Schools

Qatar is currently witnessing a strong growth in the number of pre-primary private schools. This is due to the rise in demand for quality education from expats as well as Qatari nationals and the setting up of international schools in Qatar. Most of the pre-primary schools are concentrated in the Al Rayyan and Doha municipality followed by Al Wakrah, Al Khor and Al Dhakira.

Figure 7: Region wise Distribution of Private Pre-primary Schools



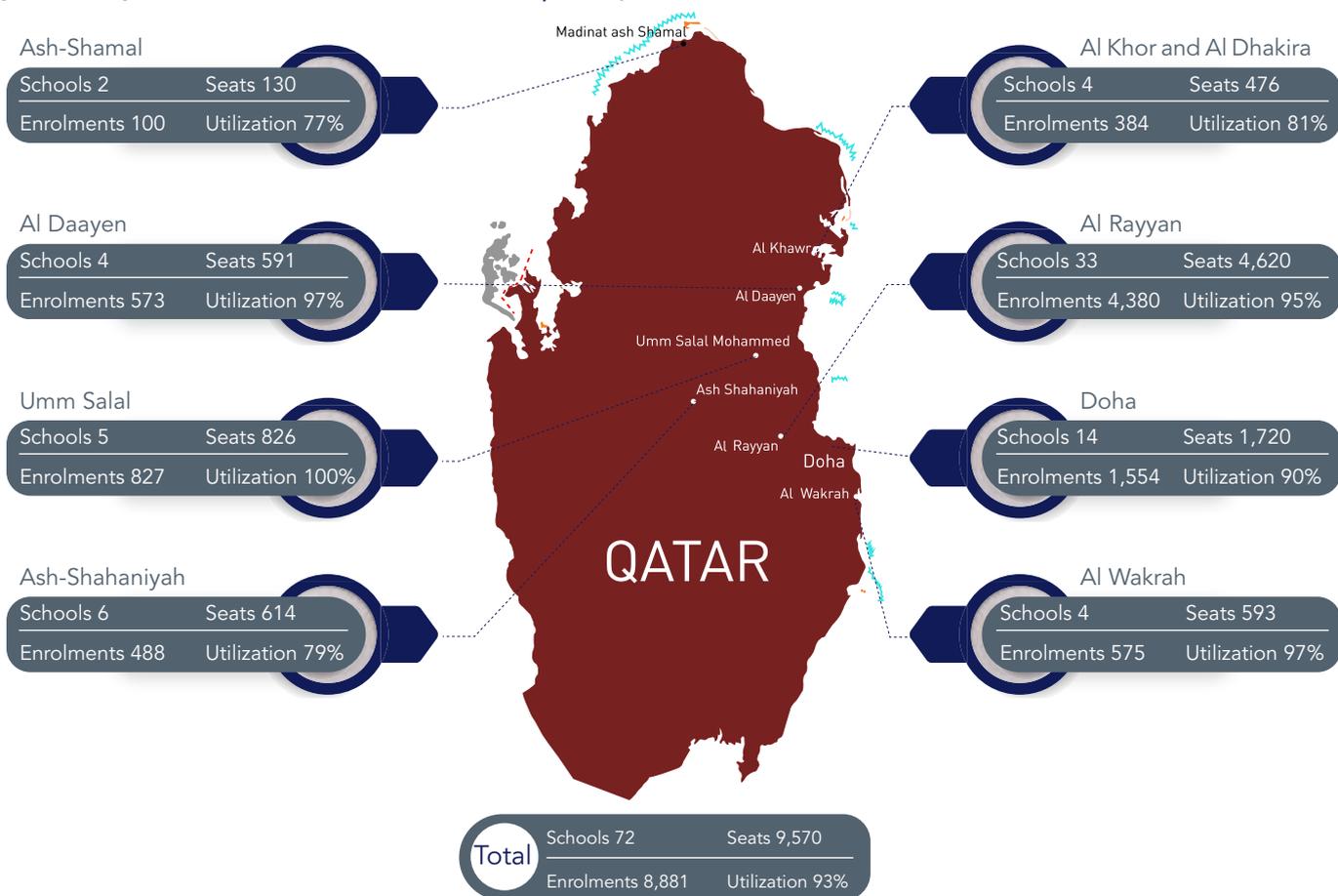
Location	Al Rayyan	Doha	Umm Salal	Al Daayen	Al Wakrah	Al Khor and Al Dhakira	Ash-Shamal	Ash-Shahaniyah	Total
Schools	82	89	6	9	23	10	1	1	221
Seats	20,441	14,505	635	876	4,696	2,495	69	849	44,566
Enrolments	19,155	13,248	505	732	3,861	1,738	69	257	39,565
Utilization	94%	91%	80%	84%	82%	70%	100%	30%	89%

Source: Team Analysis based on data from MEHE



Qatar's education system has evolved into a comprehensive educational infrastructure. Majority of the international private schools coordinate closely with educational authorities in their home countries. There are 89 private pre-primary schools in Doha with total seating capacity of 14,505 and total student enrolments of 13,248 in 2018-19, indicating a capacity utilization of 92%. There are 82 private pre-primary schools in Al Rayyan with total seating capacity of 20,440 and total student enrolments of 19,156 in 2018-19, indicating a capacity utilization of 94%. Doha and Al Rayyan are currently the densely populated municipalities in Qatar and have the maximum number of private pre-primary schools. However, there is a demand for private schools that cater to national community, because many nationals choose to enrol their children in an English- language school to enhance their fluency in English.

**Figure 8: Region wise Distribution of Public Pre-primary Schools**



Location	Al Rayyan	Doha	Umm Salal	Al Daayen	Al Wakrah	Al Khor and Al Dhakira	Ash-Shamal	Ash-Shahaniyah	Total Total
Schools	33	14	5	4	4	4	2	6	72
Seats	4,620	1,720	826	591	593	476	130	614	9,570
Enrolments	4,380	1,554	827	573	575	384	100	488	8,881
Utilization	95%	90%	100%	97%	97%	81%	77%	79%	93%

Source: Team Analysis based on data from MEHE



In the beginning, Qatar’s education system was religious in nature, and consisted of Quranic schools where young boys learned to recite the Quran and acquired basic Arabic literacy skills. There are 33 public pre-primary schools in Al Rayyan with total seating capacity of 4,620 and total student enrolments of 4,380 in 2018-19, indicating a capacity utilization of 95%. There are 14 public pre-primary schools in Doha with total seating capacity of 1,720 and total student enrolments of 1,554 in 2018-19, indicating a capacity utilization of 90%.

**Table 7: Private and Public Pre-primary Schools by Municipality, 2018-19**

Private and Public Pre-primary Schools by Municipality, 2018-19				
Location	Private	Public	Total (%)	Total
Al Daayen	4.1%	5.6%	4%	13
Al Khor and Al Dhakira	4.6%	5.6%	5%	14
Al Rayyan	37.2%	45.8%	39%	115
Al Wakrah	10.1%	5.6%	9%	27
Ash-Shahaniyah	0.5%	8.3%	2%	7
Ash-Shamal	0.5%	2.8%	1%	3
Doha	40.4%	19.4%	35%	103
Umm Salal	2.8%	6.9%	4%	11
<b>Total</b>	<b>221</b>	<b>72</b>	<b>100%</b>	<b>293</b>

Source: Team Analysis based on data from MEHE

Qatar’s population has increased at a steady pace which has fuelled the demand for educational institutions offering a broad spectrum of curriculums. Schools in Qatar are constantly updating and improving their teaching methods such as switching to the international curriculums and using English language as a medium to teach. Expat children tend to attend private international schools, thus most of them are in Doha, where majority of the expat population reside. The Al Rayyan municipality is characterized by the presence of many Qatari families, as a result more public schools are in this municipality as compared to others. Pre-primary schools with British curriculum hold a larger share in most of the municipalities, followed by schools with American and Indian curriculums. A high capacity utilization indicates that there is high demand for these curriculums and indicate that there could be a high potential for setting up new schools offering similar curriculums in these municipalities.



Table 8: Location and Curriculum Analysis for Pre-primary Private Schools, 2018-19

Private and Public Pre-primary Schools by Municipality, 2018-19							
Location	British	IB	American	Indian	National Standard	Others	Total Total
<b>Al Rayyan</b>							
Schools	43	3	7	7	6	16	82
Seats	8,191	651	1,263	3,750	1,082	5,503	20,441
Enrolments	7,528	541	1,038	3,727	1,050	5,272	19,155
Utilization	92%	83%	82%	99%	97%	96%	94%
<b>Doha</b>							
Schools	41	3	18	9	9	9	89
Seats	6,009	333	2,621	1,902	1,433	2,207	14,505
Enrolments	5,419	280	2,274	1,884	1,356	2,035	13,248
Utilization	90%	84%	87%	99%	95%	92%	91%
<b>Ash-Shamal</b>							
Schools	-	-	-	-	1	-	1
Seats	-	-	-	-	69	-	69
Enrolments	-	-	-	-	69	-	69
Utilization	-	-	-	-	100%	-	100%
<b>Al Daayen</b>							
Schools	5	1	-	-	2	1	9
Seats	345	152	-	-	251	128	876
Enrolments	235	152	-	-	213	132	732
Utilization	68%	100%	-	-	85%	103%	84%
<b>Umm Salal</b>							
Schools	13	-	3	4	2	1	23
Seats	2,142	-	524	1,565	344	121	4,696
Enrolments	1,256	-	412	584	1,489	120	3,861
Utilization	59%	-	79%	37%	433%	99%	82%

Private and Public Pre-primary Schools by Municipality, 2018-19							
Location	British	IB	American	Indian	National Standard	Others	Total Total
<b>Al Wakrah</b>							
Schools	4	-	1	1	-	-	6
Seats	337	-	62	236	-	-	635
Enrolments	242	-	43	220	-	-	505
Utilization	72%	-	69%	93%	-	-	80%
<b>Al Khor and Al Dhakira</b>							
Schools	4	-	1	3	2	-	10
Seats	1,591	-	170	479	255	-	2,495
Enrolments	871	-	158	456	253	-	1,738
Utilization	55%	-	93%	95%	99%	-	70%
<b>Ash-Shahaniyah</b>							
Schools	1	-	-	-	-	-	1
Seats	849	-	-	-	-	-	849
Enrolments	257	-	-	-	-	-	257
Utilization	30%	-	-	-	-	-	30%
<b>Total</b>							
Schools	111	7	30	24	22	27	221
Seats	19,464	1,136	4,640	7,932	3,434	7,959	44,565
Enrolments	15,808	973	3,925	6,871	4,430	7,559	39,566
Utilization	81%	86%	85%	87%	129%	95%	89%

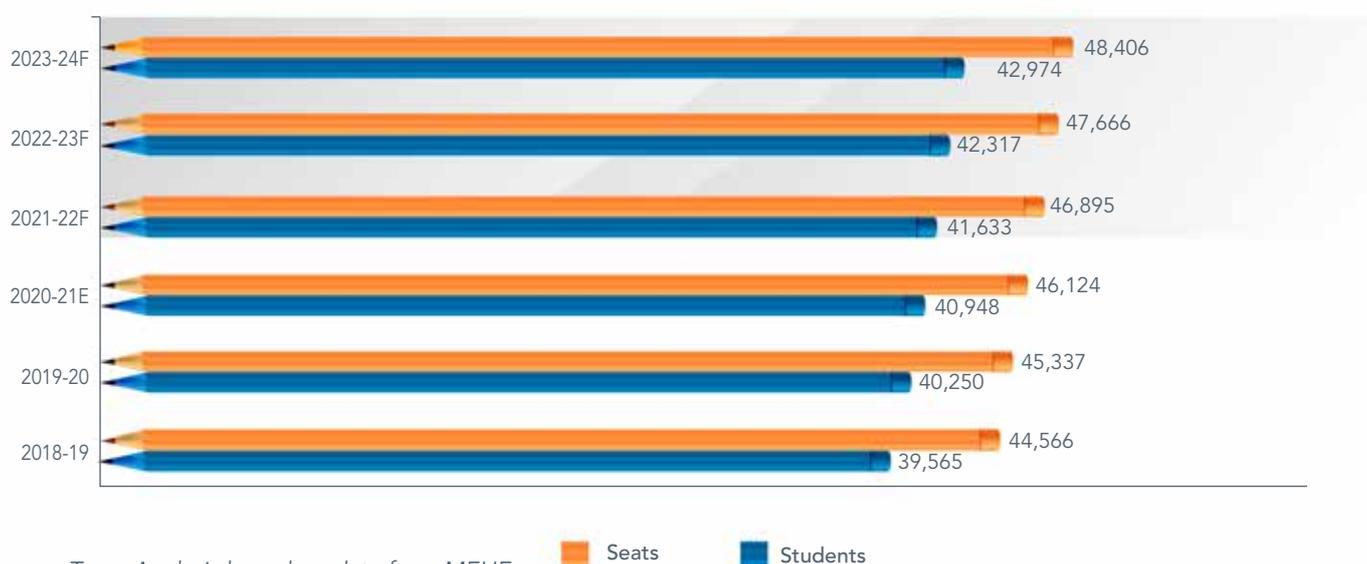
Source: Team Analysis based on data from MEHE



## 4.6. Pre-primary Schools Demand–Supply Forecast

Student enrolments in school is a key indicator of demand, while the total availability of seats is an indicator of supply.

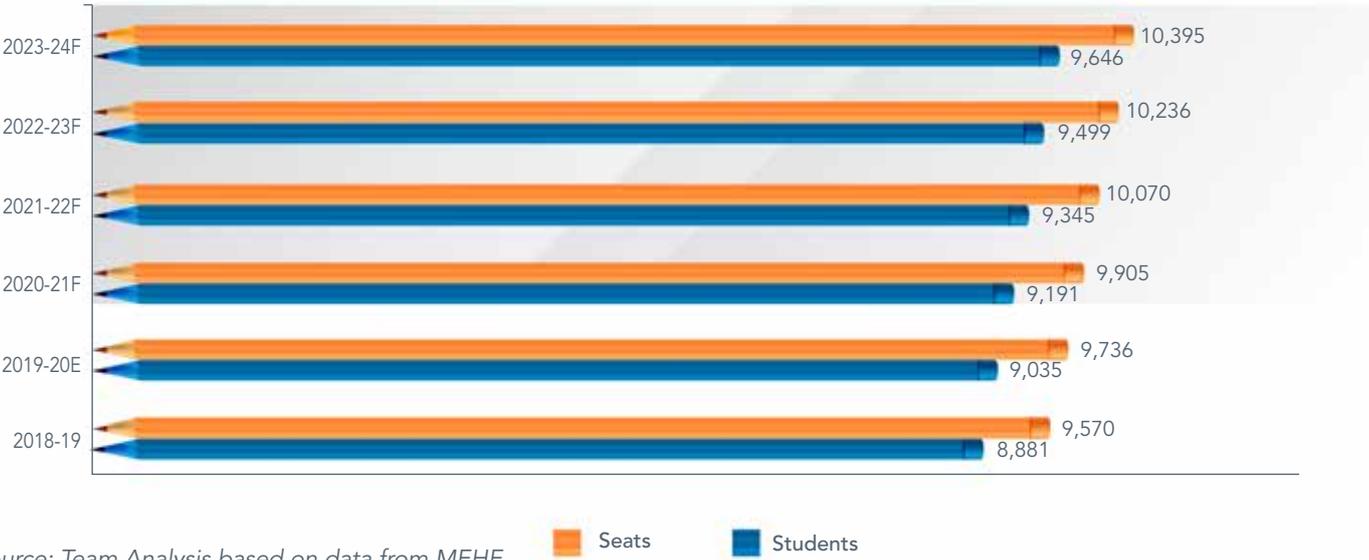
Chart 21: Private Pre-primary Seats and Enrolments Demand–Supply Forecast, 2018-19 –2023 24



Source: Team Analysis based on data from MEHE

The total students in private pre-primary schools is projected to reach 42,974 by 2023-24 from 39,565 in 2018-19, growing at a CAGR of 1.7%. Total seats are projected to reach 48,406 seats by 2023-24 from 44,566 in 2018-19, growing at a CAGR of 1.7%.

Chart 22: Public Pre-primary Seats and Enrolments Demand–Supply Forecast, 2018-19 –2023 24



Source: Team Analysis based on data from MEHE

The total student enrolments in pre-primary schools is projected to reach 9,646 by 2023-24 from 8,881 in 2018-19, growing at a CAGR of 1.7%. Total seats are projected to reach 10,395 seats by 2023-24 from 9,570 in 2018-19, growing at a CAGR of 1.7%.



### Assumptions

Student population projections is determined based on the population estimates as per age group provided by the World Bank, which corresponds to the specific age group of students in each academic year. The average number of students enrolled per school has been used as a benchmark to estimate the number of schools until 2023-24.

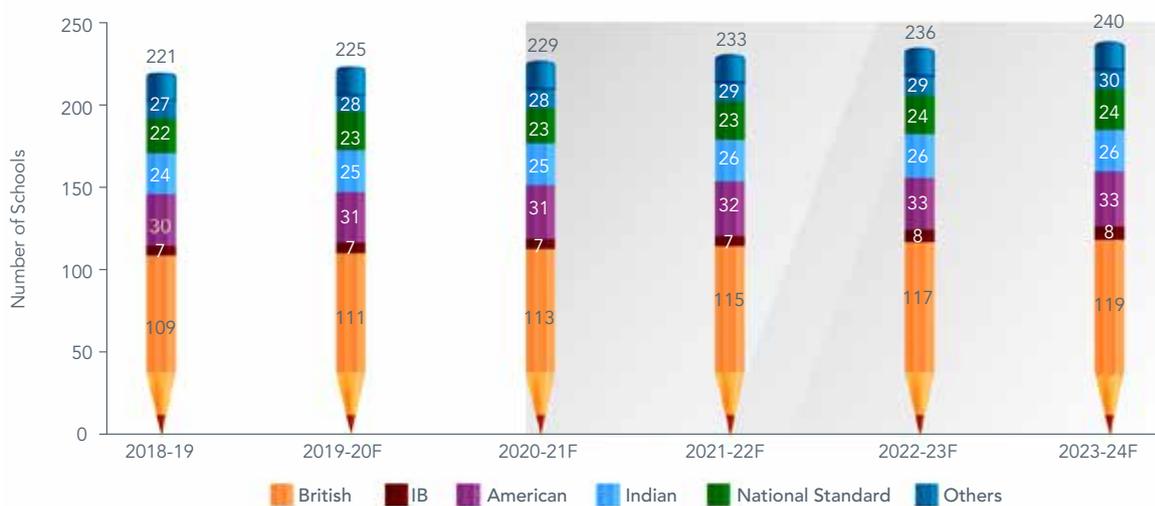
Chart 23: Total Number of Pre-primary Schools Forecast, 2018-19 - 2023-24



Source: Team Analysis based on data from MEHE

Total schools have been estimated based on the forecast of seats. Total number of private pre-primary schools is projected to grow to 240 schools in 2023-24 at a CAGR of 1.7%. The influx of expatriates and the growing importance of pre-primary education will be the key driver of growth during this period.

Chart 24: Pre- Primary Schools by Curriculum, 2018-19 - 2023-24



Source: Team Analysis based on data from MEHE

The constant increase in the rate of expat population has led to the demand for different curriculums based on the interest and preference. There are about 221 schools in 2018-19 which is projected to reach 240 schools by 2023-24. British curriculum pre-primary schools are the leading schools as compared to other curriculums with 109 schools in 2018-19 and are projected to reach about 119 schools by 2023-24.



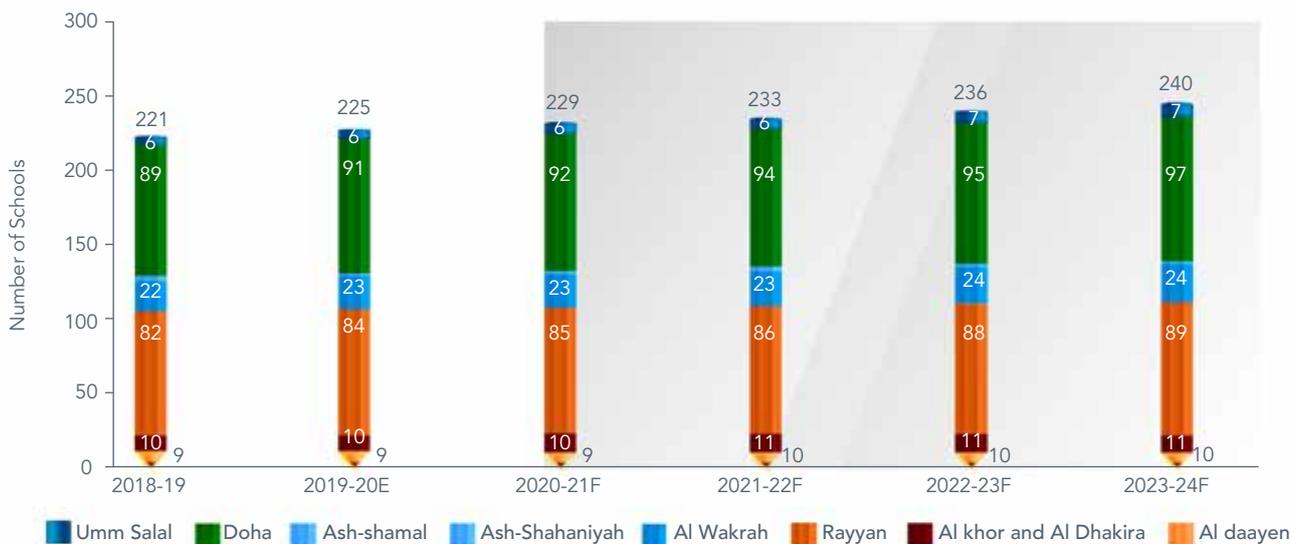
**Table 9: Pre- Primary Seats and Enrolments by Curriculum, 2018-19 - 2023-24**

Primary Seats and Enrolments by Curriculum, 2018-19 - 2023-24				
Curriculum	2018-19		2023-24	
	Enrolments	Seats	Enrolments	Seats
British	15,807	18,860	17,169	20,485
American	3,925	4,640	4,263	5,040
Indian	6,871	7,387	7,463	8,023
National Standard	4,430	4,579	4,812	4,974
IB	973	1,136	1,057	1,234
Others	7,559	7,964	8,210	8,650
<b>Total</b>	<b>39,565</b>	<b>44,566</b>	<b>42,974</b>	<b>48,406</b>

Source: Team Analysis based on data from MEHE

The total number of seats is expected to witness a growth from 44,566 seats in 2018-19 to 48,406 seats in 2023-24 having enrolments of 39,565 students in 2018-19 to 42,974 students in 2023-24 respectively. British curriculum is most preferred among other curriculums, therefore maximum number of enrolments are expected in British schools followed by Indian, National Standards and American curriculum schools.

**Chart 25: Pre- Primary Schools by Location, 2018-19 - 2023-24**



Source: Team Analysis based on data from MEHE

The total number of schools is expected to witness a growth from 221 schools in 2018-19 to 240 schools in 2023-24. Given that Doha is the hub for expat population and Al Rayyan being more populated with Qatari families, maximum number of pre-primary schools are expected to set up operations within both these areas. Opportunities for new schools also exist in Al Wakrah and Al Khor respectively.



Table 10: Pre- Primary Seats and Enrolments by Location, 2018-19 - 2023-24

Pre- Primary Seats and Enrolments by Location, 2018-19 - 2023-24				
Location	2018-19		2023-24	
	Enrolments	Seats	Enrolments	Seats
Al Daayen	732	876	795	951
Al Khor and Al Dhakira	1,738	2,495	1,888	2,710
Al Rayyan	19,155	20,441	20,805	22,202
Al Wakrah	3,861	4,696	4,194	5,100
Ash-Shahaniyah	257	849	279	922
Ash-shamal	69	69	75	75
Doha	13,248	14,505	14,390	15,755
Umm Salal	505	635	548	690
<b>Total</b>	<b>39,565</b>	<b>44,566</b>	<b>42,974</b>	<b>48,406</b>

Source: Team Analysis based on data from MEHE

In 2018-19, Al Rayyan had the maximum student's intake with about 20,441 seats and 19,155 enrolments. Doha was the second largest after Al Rayyan in terms of intake with about 14,505 seats and 13,248 enrolments in 2018-19, whereas Al Wakrah had 4,696 seats and 3,861 enrolments (in 2018-19). The number of seats is projected to increase from 44,566 seats in 2018-19 to 48,406 seats in 2023-24 having enrolments of 39,565 students in 2018-19 to 42,974 students in 2023-24 respectively.



#### 4.7. Key Takeaways

- Pre-primary is among the fastest growing within Qatar's educational sector. It contributes to ~15% of the total student population (2018-19), growing at a CAGR of 6.5% from 2012-13 to 2018-19
- Total number of private pre-primary schools is projected to grow to 240 schools in 2023-24 from 221 schools in 2018-19, growing at a CAGR of 1.7%
- Enrolments in private pre-primary schools have historically grown at a CAGR of 7.1% between 2012-13 and 2018-19
- Several pre-primary schools in the municipalities of Doha, Al Rayyan are operating at 90% and above capacity, which indicates a good potential to set-up new private pre-primary schools catering to the high demand. Opportunities exist for American and British school to open in Doha and Al Rayyan. Also, Opportunities exist for Indian school to open Al Wakrah. As per the estimates, 19 upcoming private school are likely to open by 2023-24
- Public schools have grown at a CAGR of 5.5% between 2012-13 and 2018-19, especially in the municipalities of Doha, Al Rayyan, Al Daayen, Al Wakrah and Umm Salal Muhammed indicating the potential of setting up new public primary schools in these municipalities



## 5. PRIMARY SCHOOL EDUCATION FOR CHILDREN



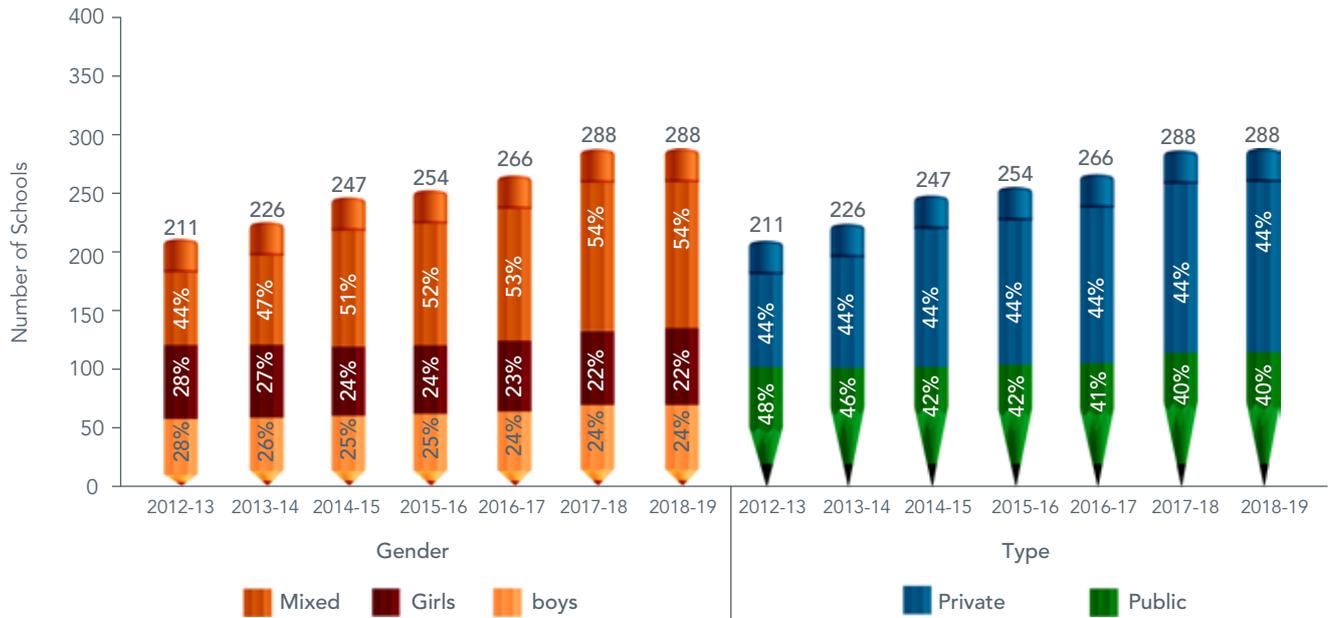
### 5.1. Primary Schools Supply Analysis

There has been a steady increase in the number of primary schools since 2012 due to stable population growth as well as increase in demand for quality education in Qatar. The total number of primary schools increased from 211 in 2012-13 to 288 schools in 2018-19, growing at a CAGR of 5.3% during this period. The 288 schools comprised of 64 girls-only, 70 boys-only and 154 mixed schools. The share of boys-only and girls-only schools which includes public schools as well as private schools has decreased during the period of 2012-13 and 2018-19. Mixed schools which are mainly private schools have shown considerable growth from 44% in 2013 to 53% in 2019. This acts as an indicator for the increase in demand for the private education in Qatar.





Chart 26: Total Number of Primary Schools by Gender Mix and Type, 2012-13 - 2018-19

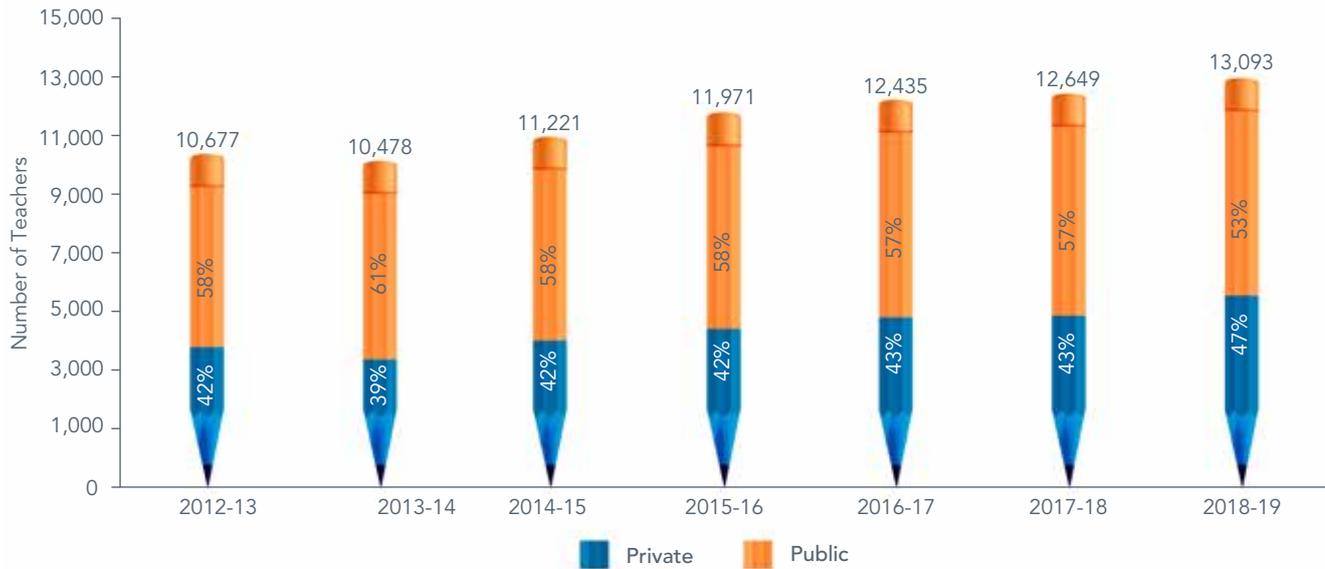


Source: Team Analysis based on data from MEHE

A total of 77 primary educational schools were added during the period of 2012-13 to 2018-19, these included 64 private and 13 public schools. The growth in the number of private schools surpassed the growth of public schools, with private schools growing at a CAGR of 8% and public schools growing at a CAGR of 2% during the period of 2012-13 and 2018-19. The share of private schools increased from 52% in 2013 to 60% in 2019 which is majorly driven by increase in expat population.

The number of primary school teachers grew at a CAGR of 3.3% between 2012-13 and 2018-19. The share of total number of teachers in private and public schools has remained almost the same since 2012-13, indicating that the teacher to student ratio in public primary schools has been improving.

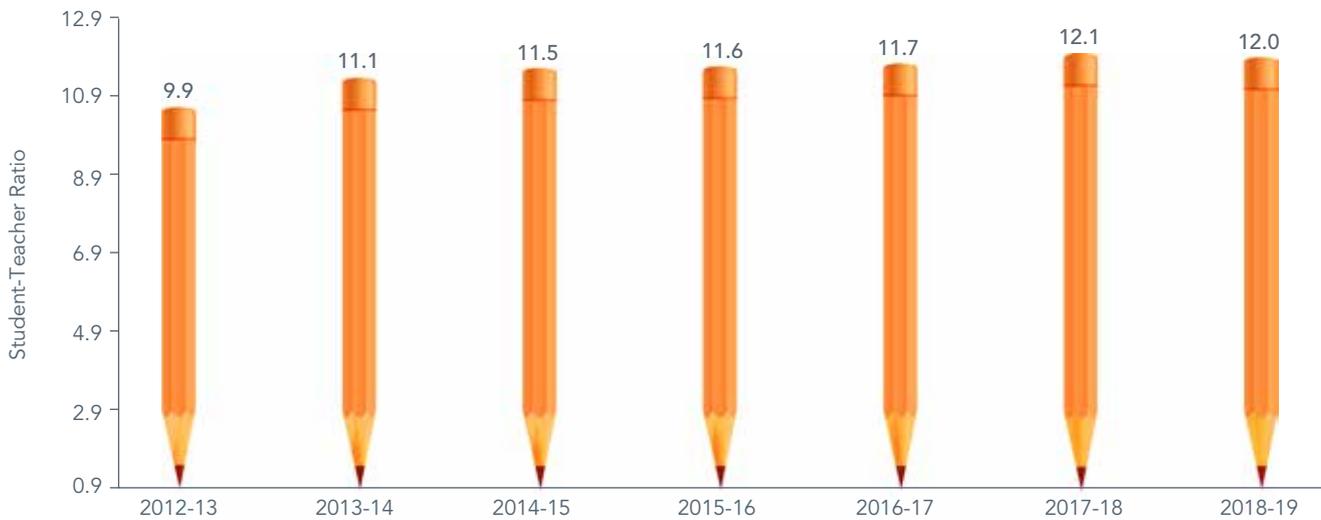
Chart 27: Primary Teachers by Type of School, - Public and Private, 2012-13 - 2018-19



Source: Team Analysis based on data from MEHE

The teacher population projection for 2018-19 has been calculated using the past average Student to Teacher ratio of 12.1:1. The number of students for 2018-19 has been obtained from the Ministry of Education and Higher Education.

Chart 28: Primary: Student to Teacher Ratio, 2012-13 - 2018-19



Source: Team Analysis based on data from MEHE

## 5.2. Primary Schools Demand Analysis

A growing economy and a steady inflow of expatriate professionals settling down in Qatar have been the key drivers of growth for quality education in Qatar. The government's increased efforts on the development of its people by investing in infrastructure and providing quality educational services as well as the entry of foreign educational institutions offering a wide spectrum of curriculums have enhanced the growth of the education sector in Qatar.

Student enrolment in schools is a key indicator to assess the growth in demand for education in Qatar. Student enrolment in primary schools increased from 105,942 enrolments in 2012-13 to 157,196 enrolments in 2018-19, growing at a CAGR of 6.8% during this period. Student enrolment in private schools grew at a CAGR of 8.5%, while enrolments in public schools grew at a CAGR of 4.1% between 2012-13 and 2018-19. The share of students in private schools remained unchanged at 64% for the past four years.

Chart 29: Student Enrolment in Primary Schools by Type and Nationality, 2012-13 - 2018-19



Source: Team Analysis based on data from MEHE

Enrolment of non-Qatari students increased significantly between 2012-13 and 2018-19, growing at a CAGR of 8.4%, while enrolment of Qatari students grew at a CAGR of 3.6% during this period. Non-Qatari student enrolments accounted for 71% of the total enrolment during 2018-19.



### 5.3. Gross Enrolment Ratio

Gross Enrolment Ratio (GER) has shown a constant increase since 2013-14 till date. GER increased significantly from 102.7 % in 2013-14 to 109.4% in 2018-19 for Non-Qatari and increase from 100.8 in 2013-14 to 101.9 in 2018-19 for Qatari. Similarly, Net enrolment rate has also increased within similar period.

Table 11: Gross Enrolment Ratio in Primary Schools, 2012-13 - 2018-19

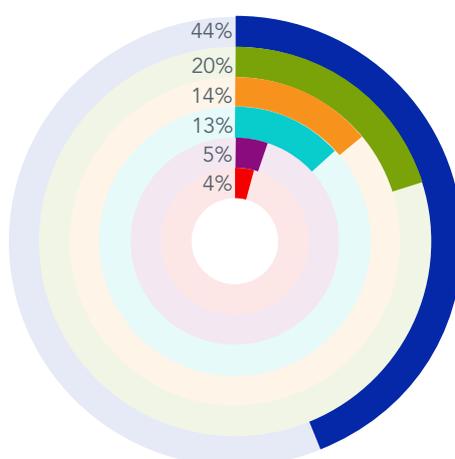
Gross Enrolment Ratio in Primary Schools, 2012-13 - 2018-19				
Years	Gross Enrolment Rate		Net Enrolment Rate	
	Qatari	Non-Qatari	Qatari	Non-Qatari
2013-14	100.8	102.7	91.9	93.0
2014-15	102.5	100.4	92.9	90.4
2015-16	103.3	103.9	93.7	94.6
2016-17	102.1	108.0	92.7	98.1
2017-18	101.9	109.4	93.1	98.7

Source: Team Analysis based on data from MEHE

### 5.4. Curriculum Analysis of Private Primary Schools

There are 173 private primary schools, of which British curriculum schools account for the largest share (44%) of private primary schools in Qatar, followed by Indian (14%) and American curriculum (13%) schools. National and IB curriculum schools account for 5% and 4% share respectively, while the other curriculums prevalent in Qatar such as German, Iranian, Bangladesh, Turkish, Canadian, Finnish etc. together account for 20% of total.

Chart 30: Primary Schools - Curriculum Analysis



Total Private Schools: 173

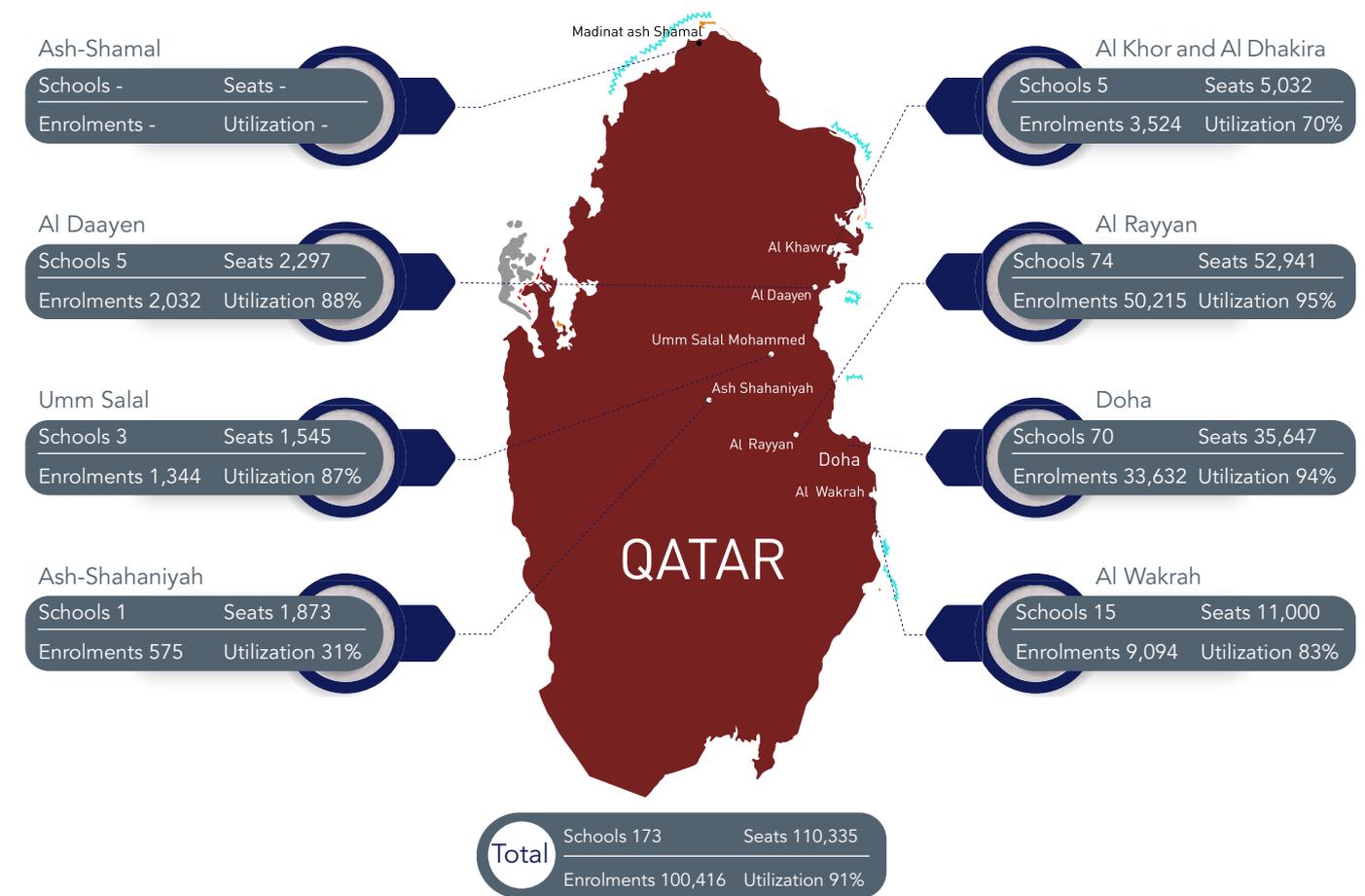
- British
- Others
- Indian
- American
- IB
- National Standard

Source: Team Analysis based on data from MEHE and Primary Interviews

## 5.5. Location Analysis of Primary Schools

A total of 288 primary schools are spread across different municipalities in Qatar. Most of the primary schools are concentrated in the Al Rayyan, Doha and Al Wakrah municipality. About 41% of the total primary schools are in the municipality of Al Rayyan, 33% are based in Doha, while 8% are based in Al Wakrah.

Figure 9: Region wise Distribution of Private Primary Schools

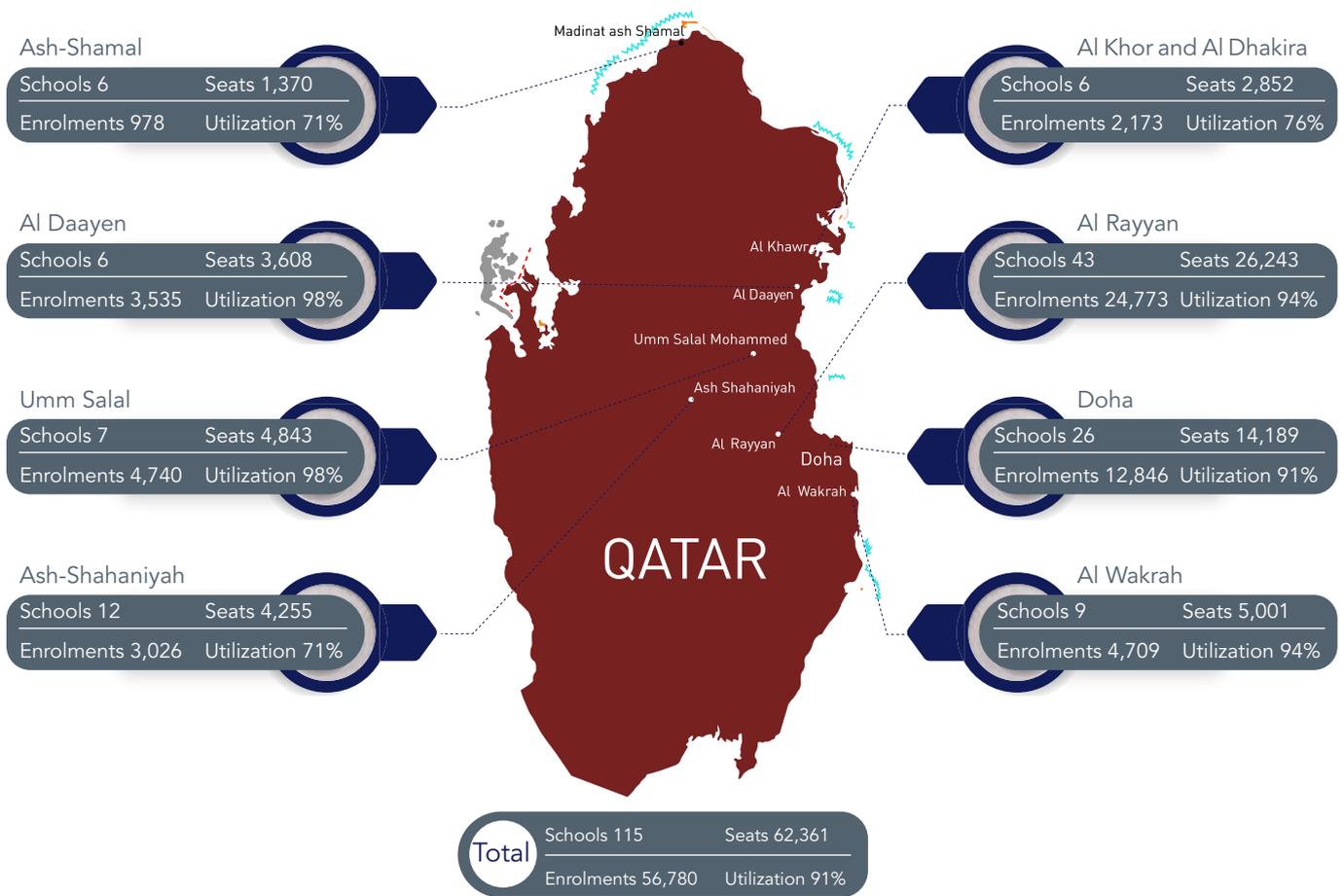


Location	Al Rayyan	Doha	Umm Salal	Al Daayen	Al Wakrah	Al Khor and Al Dhakira	Ash-Shamal	Ash-Shahaniyah	Total
Schools	74	70	3	5	15	5	-	1	173
Seats	52,941	35,647	1,545	2,297	11,000	5,032	-	1,873	110,335
Enrolments	50,215	33,632	1,344	2,032	9,094	3,524	-	575	100,416
Utilization	95%	94%	87%	88%	83%	70%	-	31%	91%

Source: Team Analysis based on data from MEHE

Private primary schools are preferred over public primary schools due to a variety of curriculums that are provided. There are 74 private primary schools in Al Rayyan with total seating capacity of 52,942 and total student enrolments of 50,215 in 2018-19, indicating a capacity utilization of 95%. There are 70 private primary schools in Doha with total seating capacity of 35,647 and total student enrolments of 33,632 in 2018-19, indicating a capacity utilization of 94%. Several major economic and social developments towards the north of Doha in Al Khor and Al Daayen have led to the establishment of five schools in Al Khor and six schools in Al Daayen. However, Doha and Al Rayyan remain the most densely populated areas with the maximum number of private primary schools.

Figure 10: Region wise Distribution of Public Primary Schools



Location	Al Rayyan	Doha	Umm Salal	Al Daayen	Al Wakrah	Al Khor and Al Dhakira	Ash-Shamal	Ash-Shahaniyah	Total Total
Schools	43	26	7	6	9	6	6	12	115
Seats	26,243	14,189	4,843	3,608	5,001	2,852	1,370	4,255	62,361
Enrolments	24,773	12,846	4,740	3,535	4,709	2,173	978	3,026	56,780
Utilization	94%	91%	98%	98%	94%	76%	71%	71%	91%

Source: Team Analysis based on data from MEHE

There are 43 public primary schools in Al Rayyan with total seating capacity of 26,243 and total student enrolments of 24,773 in 2018-19, indicating a capacity utilization of 94%. There are 26 public primary schools in Doha with total seating capacity of 14,189 and total student enrolments of 12,846 in 2018-19, indicating a capacity utilization of 94%.

**Table 12: Private and Public Schools for Primary, 2018-19**

Private and Public Schools for Primary, 2018-19				
Location	Private	Public	Total (%)	Total
Al Daayen	3%	5%	4%	12
Al Khor and Al Dhakira	3%	5%	4%	11
Al Rayyan	43%	37%	41%	118
Al Wakrah	9%	8%	8%	24
Ash-Shahaniyah	1%	10%	4%	12
Ash-shamal	0%	5%	2%	6
Doha	40%	23%	33%	96
Umm Salal	2%	6%	3%	10
<b>Total</b>	<b>173</b>	<b>115</b>	<b>100%</b>	<b>288</b>

Source: Team Analysis based on data from MEHE

With the modernization of the education sector along with the entry of several private educational institutions in Qatar, international curriculums are gaining popularity amongst the expatriate as well as the local population. Across all municipalities, primary schools with British curriculum are the most popular schools, followed by Indian and American curriculum schools. The National curriculum and IB schools are the other leading curriculums in most municipalities. A high capacity utilization indicates that there is high demand for these curriculums and show a high potential for setting up new schools offering similar curriculums in these municipalities.

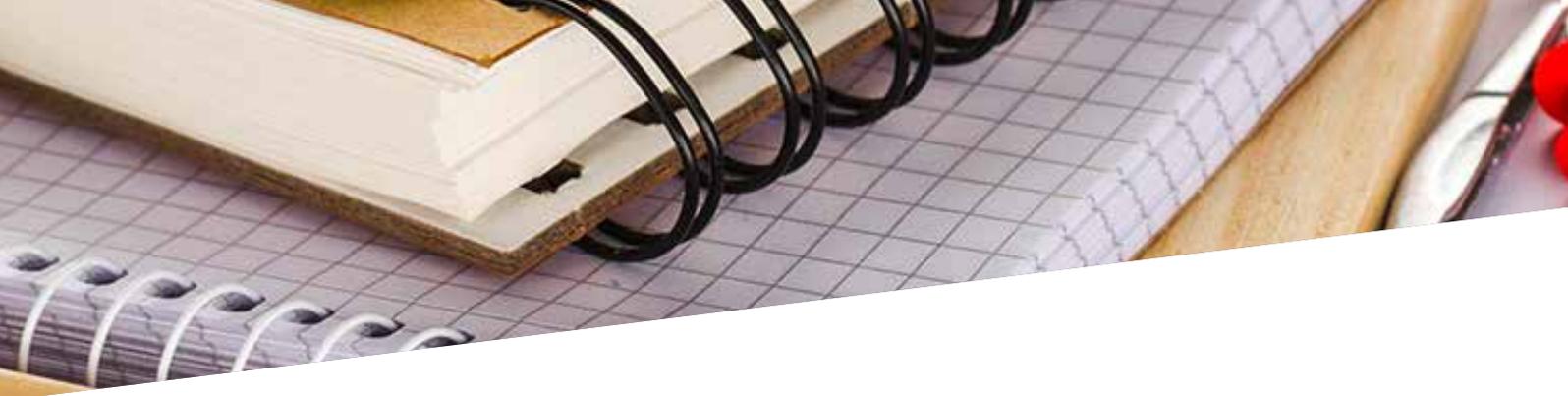


Table 13: Location and Curriculum Analysis for Primary Private Schools, 2018-19

Table 13. Location and Curriculum Analysis for Primary Private Schools, 2018-19							
Total	British	IB	American	Indian	National Standard	Others	Total Total
<b>Al Rayyan</b>							
Schools	32	4	6	7	5	20	<b>74</b>
Seats	18,668	3,000	3,389	10,988	2,274	14,622	<b>52,941</b>
Enrolments	17,031	2,670	3,167	10,879	2,267	14,201	<b>50,215</b>
Utilization	91%	89%	93%	99%	100%	97%	<b>95%</b>
<b>Doha</b>							
Schools	30	4	12	10	2	12	<b>70</b>
Seats	14,757	1,485	5,565	6,672	502	6,666	<b>35,647</b>
Enrolments	14,296	833	5,268	6,436	500	6,299	<b>33,632</b>
Utilization	97%	56%	95%	96%	100%	94%	<b>94%</b>
<b>Al Daayen</b>							
Schools	3	1	-	-	-	1	<b>5</b>
Seats	848	466	-	-	-	983	<b>2,297</b>
Enrolments	695	464	-	-	-	873	<b>2,032</b>
Utilization	82%	100%	-	-	-	89%	<b>88%</b>
<b>Al Khor and Al Dhakira</b>							
Schools	3	-	1	1	-	-	<b>4</b>
Seats	3,381	-	810	841	-	-	<b>597</b>
Enrolments	2,181	-	673	670	-	-	<b>512</b>
Utilization	65%	-	83%	80%	-	-	<b>86%</b>

Table 13. Location and Curriculum Analysis for Primary Private Schools, 2018-19							
Total	British	IB	American	Indian	National Standard	Others	Total Total
<b>Umm Salal</b>							
Schools	1	-	1	1	-	-	3
Seats	310	-	286	949	-	-	1,545
Enrolments	258	-	232	854	-	-	1,344
Utilization	83%	-	81%	90%	-	-	87%
<b>Al Wakrah</b>							
Schools	7	-	3	5	-	-	15
Seats	3,837	-	1,956	5,207	-	-	11,000
Enrolments	2,520	-	1,498	5,076	-	-	9,094
Utilization	66%	-	77%	97%	-	-	83%
<b>Ash-Shahaniyah</b>							
Schools	1	-	-	-	-	-	1
Seats	1,873	-	-	-	-	-	1,873
Enrolments	575	-	-	-	-	-	575
Utilization	31%	-	-	-	-	-	31%
<b>Total</b>							
Schools	77	9	23	24	7	33	173
Seats	43,674	4,951	12,006	24,657	2,776	22,271	110,335
Enrolments	37,556	3,967	10,838	23,915	2,767	21,373	100,416
Utilization	86%	80%	90%	97%	100%	96%	91%

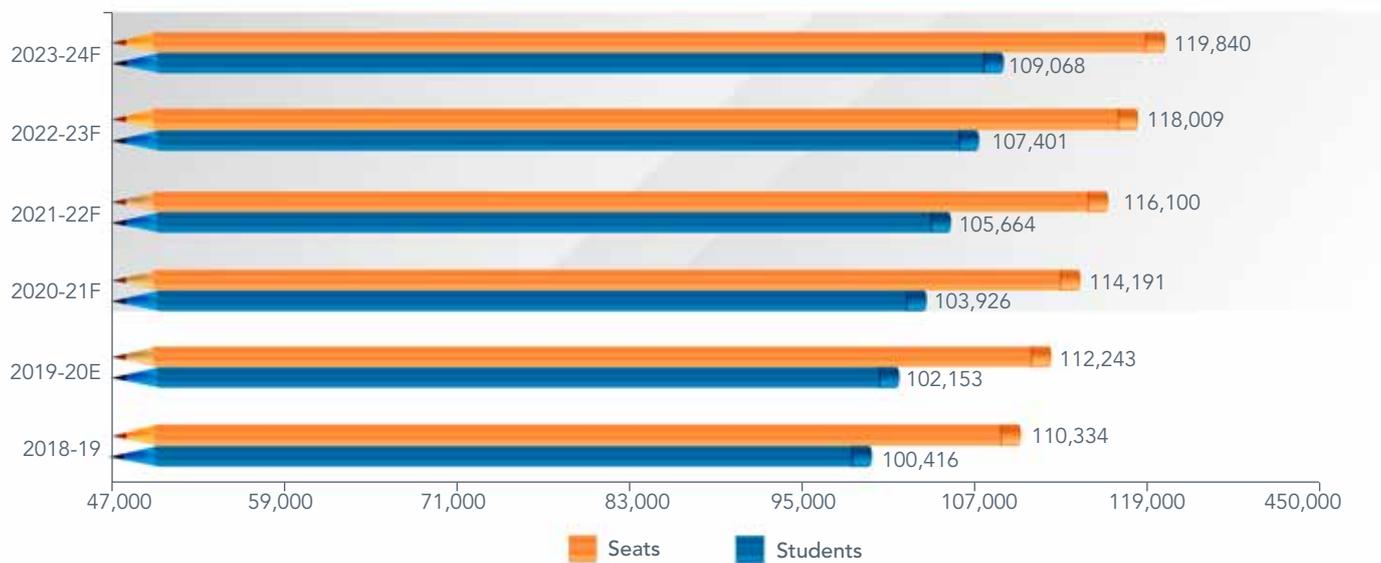
Source: Team Analysis based on data from MEHE



## 5.6. Primary Schools Demand and Supply Forecast

Student enrolment in schools is a key indicator of demand, while the total availability of seats is an indicator of supply.

Chart 31: Primary Schools Demand (Private)-Supply Forecast, 2018-19 - 2023-24

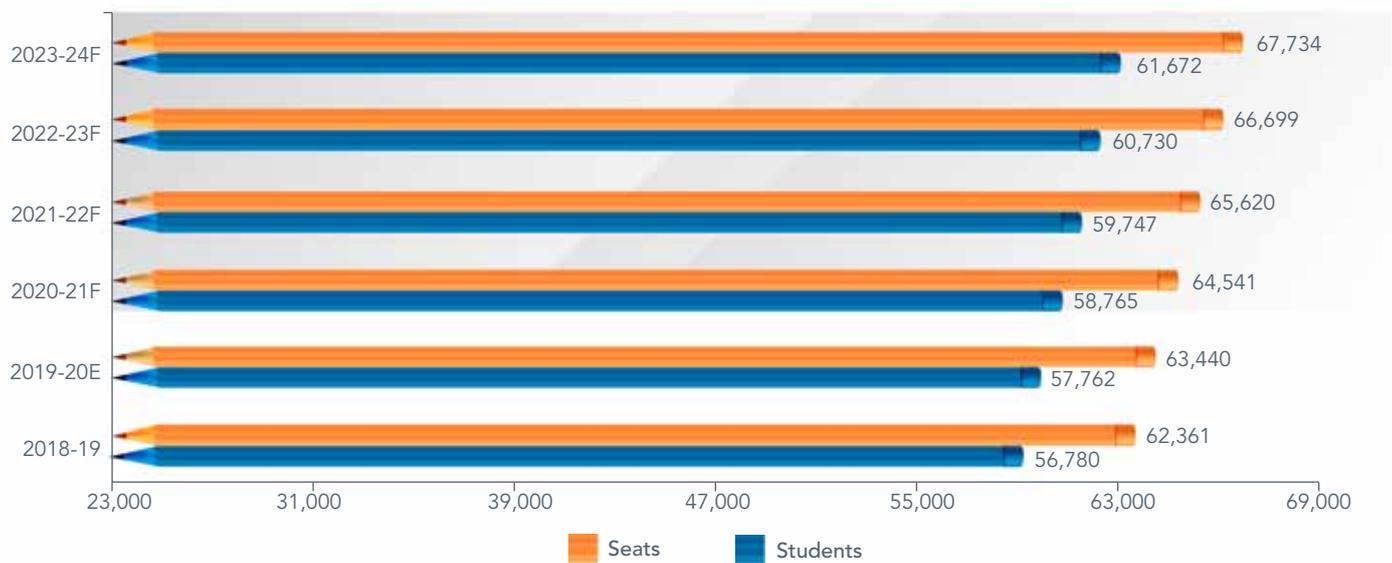


Source: Team Analysis based on data from MEHE

The total student enrolments in private primary schools is projected to reach 109,068 by 2023-24 from 100,416 in 2018-19, growing at a CAGR of 1.7%. Total seats are projected to reach 119,840 seats by 2023-24 from 110,334 in 2018-19, growing at a CAGR of 1.7%.



Chart 32: Primary Schools Demand (Public) -Supply Forecast, 2018-19 - 2023-24



Source: Team Analysis based on data from MEHE

The total student enrolments in public primary schools is projected to reach 61,672 by 2023-24 from 56,780 in 2018-19, growing at a CAGR of 1.7%. Total seats are projected to reach 67,734 seats by 2023-24 from 62,361 in 2018-19, growing at a CAGR of 1.7%

### Assumptions

Student population projections is determined based on the population estimates as per age group provided by the World Bank, which corresponds to the specific age group of students in each academic year. The average number of students enrolled per school has been used as a benchmark to estimate the number of schools until 2023-24.



Chart 33: Total Number of Primary Schools Forecast, 2018-19 - 2023-24



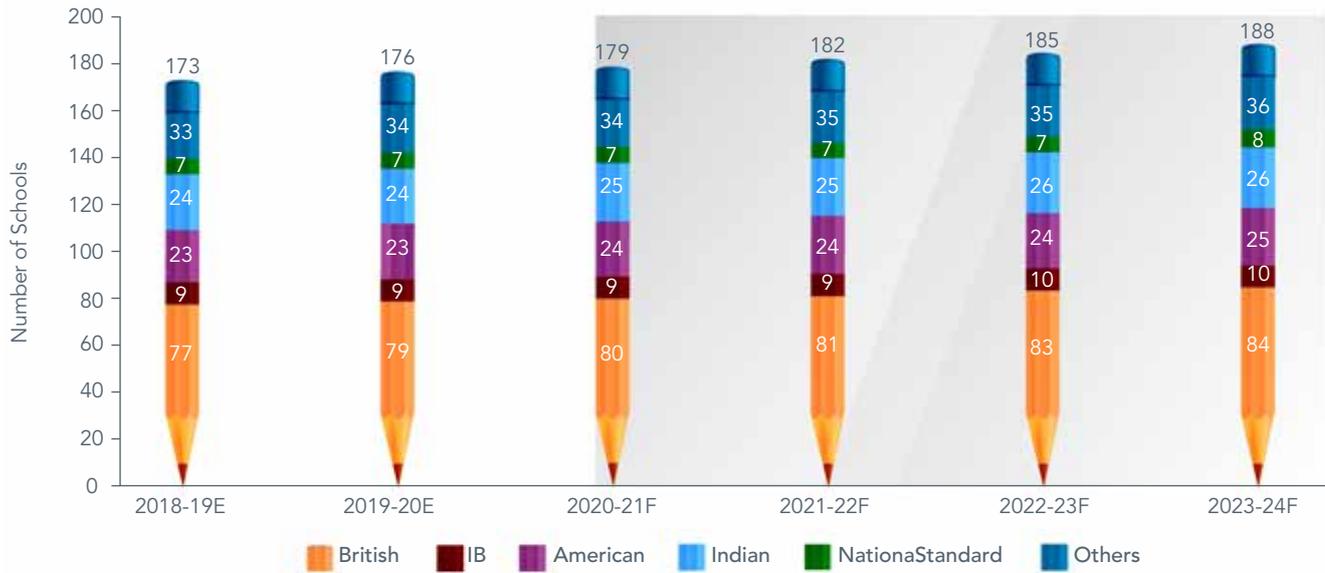
Source: Team Analysis based on data from MEHE

Total schools have been estimated based on forecast of seats till 2023-24.

Total number of primary schools is projected to grow at a CAGR of 1.7% between 2018-19 and 2023-24. The steady growth in local and expatriate population combined with the increase in the number of private education institutions will drive the growth in the education sector in Qatar.



Chart 34: Primary Schools by Curriculum, 2018-19 - 2023-24



Source: Team Analysis based on data from MEHE

The constant increase in the rate of expats has led to a demand for different curriculums based on the interest and preference. There are about 4173 schools in 2018-19 which is projected to reach 188 schools by 2023-24. British curriculum schools are the most popular curriculum schools projected to reach 83 schools of the total primary schools by 2023-24.



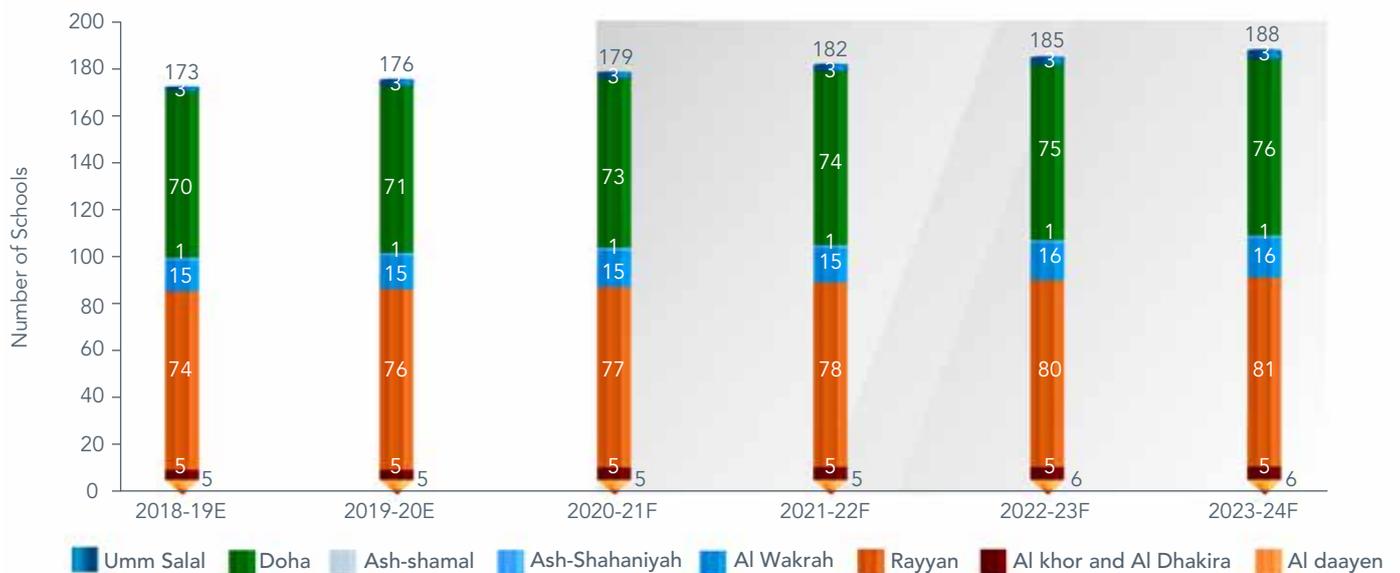
Table 14: Primary Seats and Enrolments by Curriculum, 2018-19 - 2023-24

Primary Seats and Enrolments by Curriculum, 2018-19 - 2023-24				
Curriculum	2018-19		2023-24	
	Enrolments	Seats	Enrolments	Seats
British	37,556	43,673	40,792	47,436
American	10,838	12,006	11,772	13,041
Indian	23,915	24,657	25,975	26,781
National Standard	2,767	2,776	3,005	3,015
IB	3,967	4,951	4,309	5,378
Others	21,373	22,271	23,215	24,190
<b>Total</b>	<b>100,416</b>	<b>110,334</b>	<b>109,068</b>	<b>119,840</b>

Source: Team Analysis based on data from MEHE

British curriculum is the most popular amongst other curriculums, therefore maximum number of enrolments are in British schools followed by Indian, American and IB. The total number of seats is expected to witness a growth from 110,334 seats in 2018-19 to 119,840 seats in 2023-24, with enrolments of 100,416 students in 2018-19 to 109,068 students in 2023-24 respectively.

Chart 35: Primary Schools by Location, 2018-19 - 2023-24



Source: Team Analysis based on data from MEHE

Doha and Al Rayyan have a higher concentration of Qatari families and expats, as a result a higher number of primary schools are situated in both these areas. In 2018-19 a total of 70 primary schools were based in Doha and 74 schools were based in Al Rayyan which is projected to reach 76 and 81 schools respectively by 2023-24. Opportunities for new schools also exist in the upcoming areas such as Al Wakrah and Al Khor.



Table 15: Primary Seats and Enrolments by Location, 2018-19 - 2023-24

Primary Seats and Enrolments by Location, 2018-19 - 2023-24				
Curriculum	2018-19		2023-24	
	Enrolments	Seats	Enrolments	Seats
Al Daayen	2,032	2,296	2,208	2,494
Al Khor and Al Dhakira	3,524	5,032	3,827	5,466
Al Rayyan	50,215	52,940	54,542	57,501
Al Wakrah	9,094	11,000	9,878	11,948
Ash-Shahaniyah	575	1,873	624	2,034
Ash-shamal	-	-	-	-
Doha	33,632	35,647	36,529	38,719
Umm Salal	1,344	1,545	1,460	1,678
<b>Total</b>	<b>100,416</b>	<b>110,334</b>	<b>109,068</b>	<b>119,840</b>

Source: Team Analysis based on data from MEHE

In 2018-19, Al Rayyan had the maximum student intake with about 52,940 seats and 50,215 enrolments followed by Doha with about 35,647 seats and 33,632 enrolments, while Al Wakrah had 11,000 seats and 9,094 enrolments.



## 5.7. Key Takeaways

- Total number of primary schools grew at a CAGR of 5.2%, the growth in the number of private schools surpassed the growth of public schools, growing at a CAGR of 8.1%
- Most of the private primary schools are in Doha and Al Rayyan, as a huge part of Qatar's population resides in these 2 municipalities
- A total of 77 primary educational schools were added during the period of 2012-13 to 2018-19, these included 64 private and 13 public schools
- Enrolments in private primary schools have grown at a CAGR of 8.5% between 2013 and 2019, whereas public primary schools have grown at a CAGR of 4.1% between 2013 and 2019 within the municipalities of Doha, Al Rayyan, Al Daayen, Al Wakrah and Umm Salal Muhammed
- The total student enrolments in private primary schools is projected to reach 109,068 by 2023-24 from 100,416 in 2018-19, growing at a CAGR of 1.7%
- Non-Qatari student's enrolments increased at a growing CAGR of 8.4%, while enrolment of Qatari students grew at a CAGR of 3.6%, between 2012-13 and 2018-19
- Several primary schools in the municipalities of Doha, Al Rayyan are operating at 90% and above capacity, which indicates a good potential to set-up new private pre-primary schools catering to the high demand. Opportunities exist for American, Indian and British school to open in Doha and Al Rayyan. 15 upcoming private school are likely to open by 2023-24.

مبنى البنات  
الرئيسي

MAIN WOMEN'S  
BUILDING



## 6. SECONDARY SCHOOL EDUCATION FOR CHILDREN



Secondary education is divided into two levels: 1) preparatory level and 2) secondary level. The preparatory level is for a duration of three years (grade 7 to 9). Upon completion of the preparatory level, the student moves to the secondary level for a duration of another three years (grade 10 to 12).

### 6.1. Preparatory Level

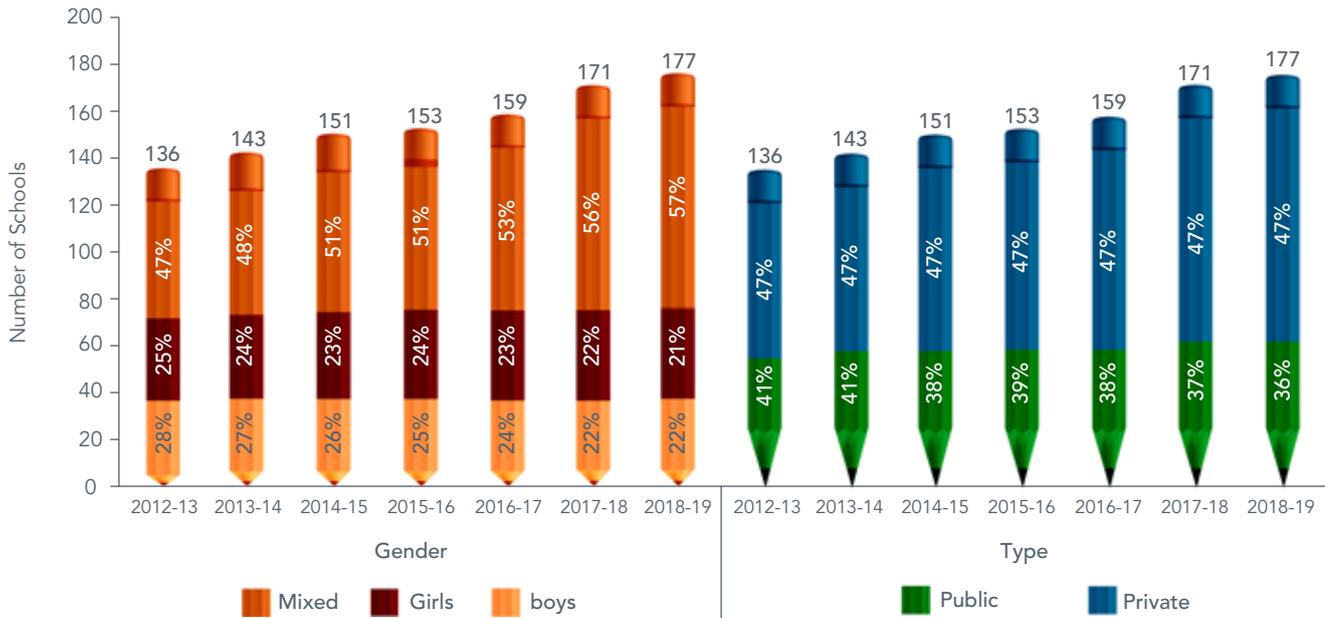
#### 6.1.1. Preparatory Schools Supply Analysis

A total of 177 schools offering preparatory education were operational in 2018-19 which include 37 girls-only, 37 boys-only and 101 mixed schools. The number of preparatory schools increased from 136 in 2012-13 to 177 in 2018-19, growing at a CAGR of 4.5% during this period. The share of boys-only and girls-only schools which includes public schools as well as private schools have declined marginally during the period of 2012-13 and 2018-19. However, the share of mixed schools which are mainly private schools increased from 47% in 2013 to 64% in 2019.





Chart 36: Total Number of Preparatory Schools by Gender Mix and Type, 2012-13 - 2018-19



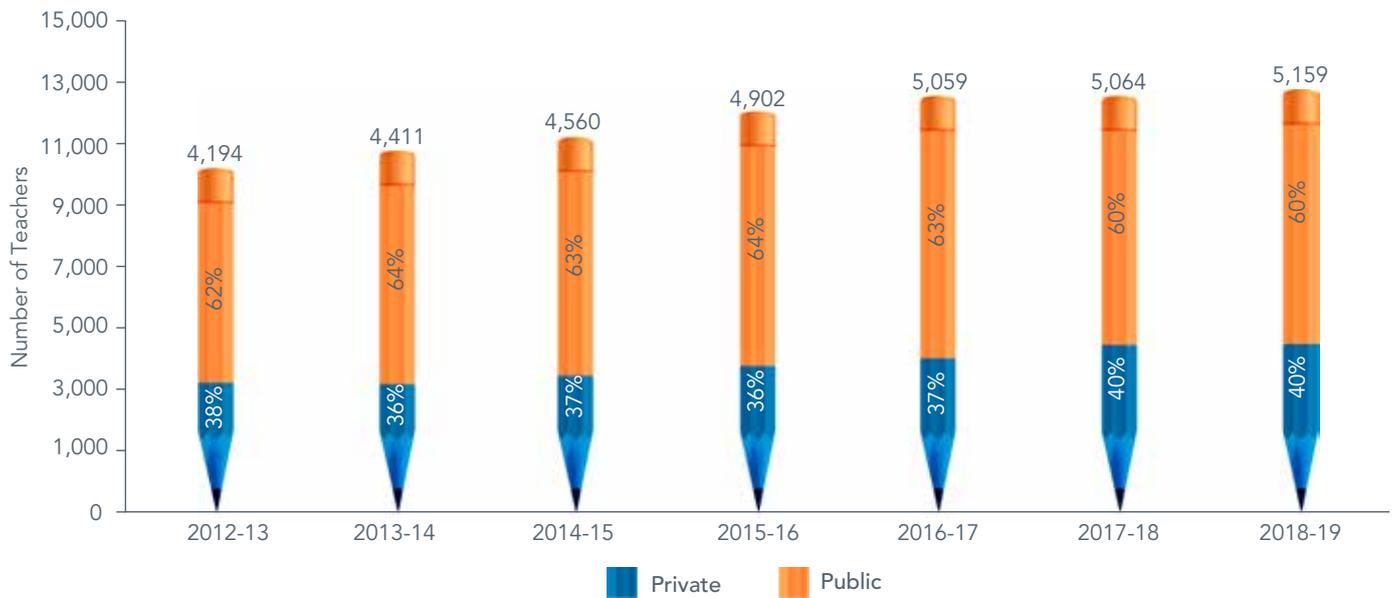
Source: Team Analysis based on data from MEHE

A total of 41 preparatory educational schools were added during the period of 2012-13 and 2018-19, these included 34 private and 7 public schools. The growth in the number of private schools surpassed the growth of public schools, with private schools growing at a CAGR of 6.1% and public schools growing at a CAGR of 2% during the period of 2012-13 and 2018-19. The share of private schools increased from 59% in 2013 to 64% in 2019, driven by increase in expat population.

The number of preparatory school teachers grew at a CAGR of 4.6% between 2012-13 and 2018-19. The share of total number of teachers in private and public preparatory schools has remained almost the same since 2012-13, indicating that the teacher to student ratio at private preparatory schools is lower compared to public preparatory schools.



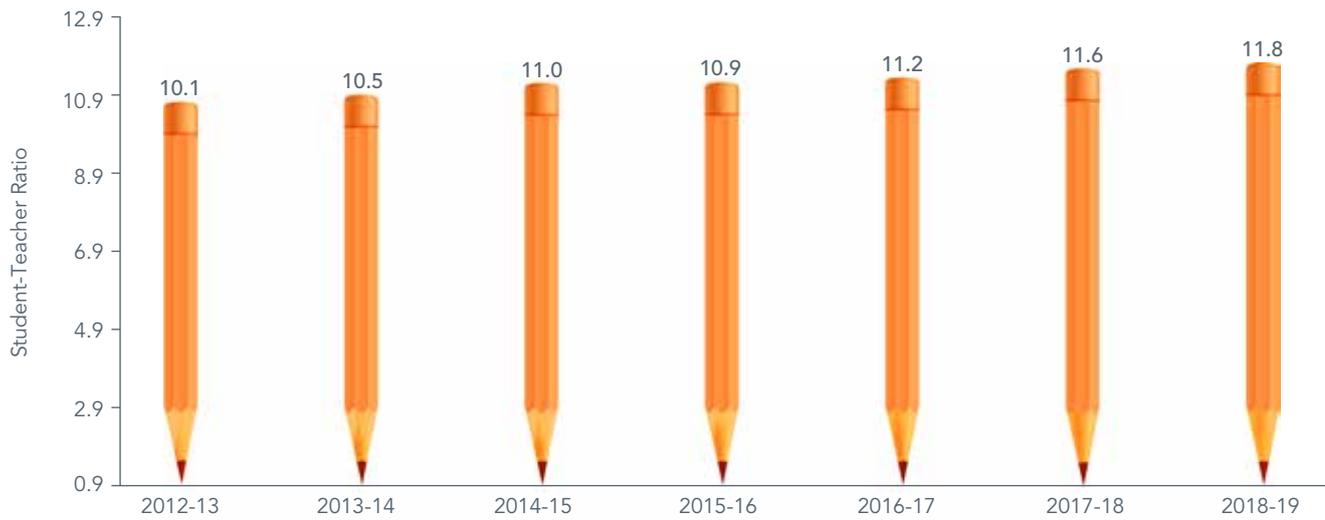
Chart 37: Preparatory Teachers by Type of School, Private and Public, 2012-13 - 2018-19



Source: Team Analysis based on data from MEHE

Student to teacher ratio increased from 10.1 in 2012-13 to 11.6 in 2018-19. A higher ratio over the previous year indicates that the growth in the number of teachers did not increase in tandem with the growth in the number of students. Efforts are being made by the government to allow schools to recruit teachers from multiple nationalities other than the existing ones.

Chart 38: Preparatory: Student to Teacher Ratio, 2012-13 - 2018-19



Source: Team Analysis based on data from MEHE and Primary Interviews





### 6.1.2. Preparatory School Demand Analysis

Demand for preparatory schools increased in line with increase in the number of expats in the country. Student enrolment in preparatory schools increased from 42,430 enrolments in 2012-13 to 60,866 enrolments in 2018-19, growing at a CAGR of 6.2% during this period. Student enrolment in private schools grew at a CAGR of 8.2%, while enrolments in public schools grew at a CAGR of 4.2% between 2012-13 and 2018-19. The share of students in private schools increased from 48% in 2012-13 to 53% in 2018-19.

**Chart 39: Student Enrolment in Preparatory by type and Nationality, 2012-13 - 2018-19**



Source: Team Analysis based on data from MEHE

Enrolment of non-Qatari students increased significantly between 2012-13 and 2018-19, growing at a CAGR of 6.2%, while enrolment of Qatari students grew at a CAGR of 3.6% during this period. Non-Qatari student enrolments accounted for 65% of the total enrolment during 2018-19.

### 6.1.2 Gross Enrolment Ratio

Gross Enrolment Ratio (GER) has shown a constant increase since 2012-13 till date. GER increased significantly from 100 % in 2012-13 to 102% in 2018-19 for Non-Qatari and increase from 98.3 in 2012-13 to 104.5 in 2018-19 for Qatari. Similarly, Net enrolment rate has also increased within similar period.

Table 16. Gross Enrolment Ratio in Primary Schools, 2012-13 - 2018-19

Gross Enrolment Ratio in Primary Schools, 2012-13 - 2018-19				
Years	Gross Enrolment Rate		Net Enrolment Rate	
	Qatari	Non-Qatari	Qatari	Non-Qatari
2012-13	98.3	100	81.3	82.8
2013-14	100.1	99	82.5	82
2014-15	98.3	95.5	80.3	78.8
2015-16	100.9	95.2	83	79.3
2016-17	105.2	102.4	84.2	85.2
2017-18	104.5	102	84.3	85

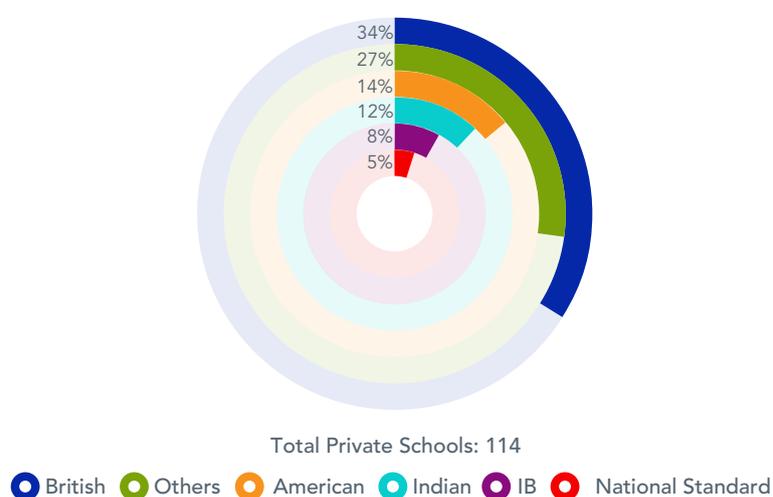
Source: Team Analysis based on data from MEHE



### 6.1.3. Curriculum Analysis of Preparatory Schools

British curriculum schools are currently the most popular preparatory schools. About 34% of the private schools provide British curriculum followed by American curriculum schools with 14% share and Indian curriculum schools with 12% share. National curriculum and International Baccalaureate (IB) schools account for 8% and 5% share respectively. Other curriculums like German, Iranian, Bangladesh, Turkish, Canadian, Finnish, etc. together accounted for 27% share.

Chart 40: Private Preparatory Schools - Curriculum Analysis, 2018-19



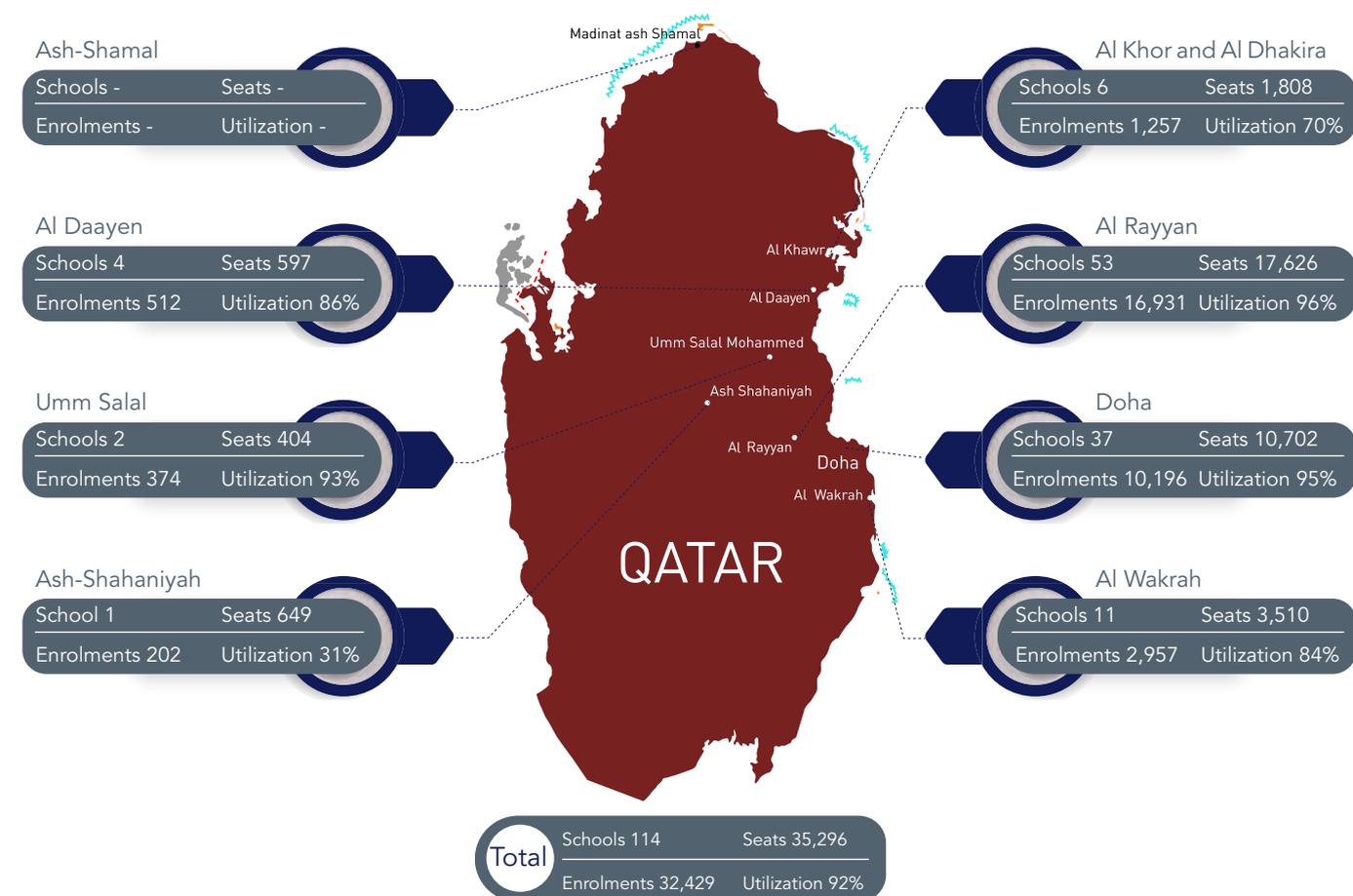
Source: Team Analysis based on data from MEHE

### 6.1.4. Preparatory Schools Location Analysis

The preparatory level is an intermediate stage between primary and secondary education that assists in developing the fundamental subjects introduced in the primary schools. Qatar has a total of 177 preparatory schools consisting of 114 private and 63 public schools.

Most of the preparatory schools are concentrated in the Al Rayyan, Doha and Al Wakrah municipality. About 42% of the total preparatory schools are based in the municipality of Al Rayyan, 28% are based in Doha, while 10% are based in Al Wakrah. The municipality of Al Rayyan has 46% of the total private preparatory schools and 37% of the total public preparatory schools in Qatar, while Doha has 32% of the total private preparatory schools and 19% of the total public preparatory schools in Qatar.

Figure 11: Region wise Distribution of Private Preparatory Schools

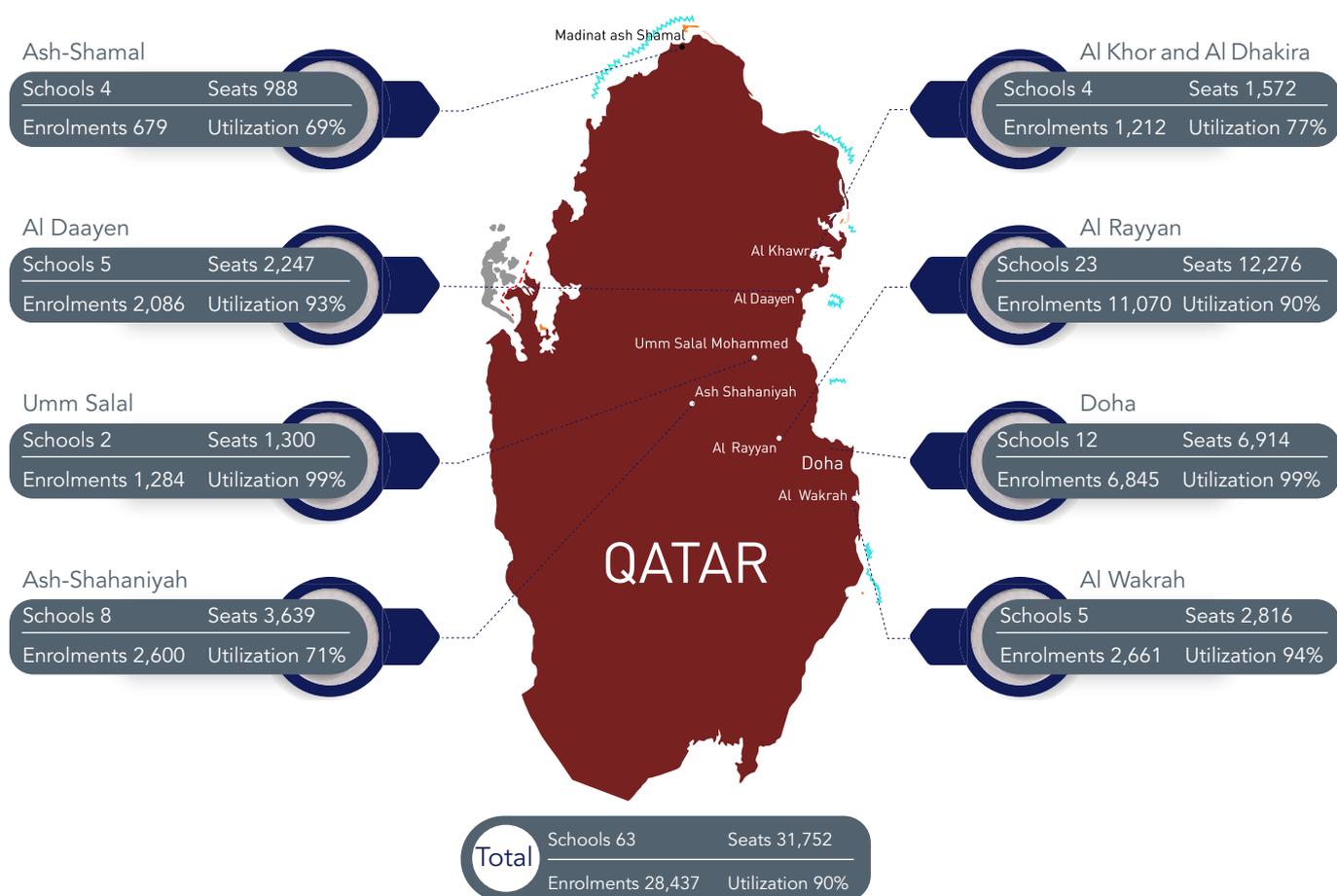


Location	Al Rayyan	Doha	Umm Salal	Al Daayen	Al Wakrah	Al Khor and Al Dhakira	Ash-Shamal	Ash-Shahaniyah	Total
Schools	53	37	2	4	11	6	-	1	114
Seats	17,626	10,702	404	597	3,510	1,808	-	649	35,296
Enrolments	16,931	10,196	374	512	2,957	1,257	-	202	32,429
Utilization	96%	95%	93%	86%	84%	70%	-	31%	92%

Source: Team Analysis based on data from MEHE

There are 52 private preparatory schools in Al Rayyan with total seating capacity of 17,626 and total student enrolments of 16,931 in 2018-19, indicating a capacity utilization of 96%. There are 37 private preparatory schools in Doha with total seating capacity of 10,702 and total student enrolments of 10,196 in 2018-19, indicating a capacity utilization of 95%. With the expected growth in student population over the next five years, these municipalities indicate a high potential for setting up new private preparatory schools.

Figure 12: Region wise Distribution of Public Preparatory Schools



Location	Al Rayyan	Doha	Umm Salal	Al Daayen	Al Wakrah	Al Khor and Al Dhakira	Ash-Shamal	Ash-Shahaniyah	Total
Schools	23	12	2	5	5	4	4	8	63
Seats	12,276	6,914	1,300	2,247	2,816	1,572	988	3,639	31,752
Enrolments	11,070	6,845	1,284	2,086	2,661	1,212	679	2,600	28,437
Utilization	90%	99%	99%	93%	94%	77%	69%	71%	90%

Source: Team Analysis based on data from MEHE

There are 23 public preparatory schools in Al Rayyan with total seating capacity of 12,276 and total student enrolments of 11,070 in 2018-19, indicating a capacity utilization of 90%. There are 12 public preparatory schools in Doha with total seating capacity of 6,914 and total student enrolments of 6,845 in 2018-19, indicating a capacity utilization of 99%. Such high utilization rates at public preparatory schools in the large municipalities of Doha and Al Rayyan indicate a high potential of setting up new public preparatory schools.

Table 17: Private and Public Schools for Preparatory, 2018-19

Private and Public Schools for Preparatory, 2018-19				
Location	Private	Public	Total (%)	Total
Al Daayen	4%	8%	5%	9
Al Khor and Al Dhakira	5%	6%	6%	10
Al Rayyan	46%	37%	42%	75
Al Wakrah	11%	8%	10%	17
Ash-Shahaniyah	1%	13%	5%	9
Ash-shamal	0%	6%	2%	4
Doha	32%	19%	28%	49
Umm Salal	2%	3%	2%	4
<b>Total</b>	<b>114</b>	<b>63</b>	<b>100%</b>	<b>177</b>

Source: Team Analysis based on data from MEHE

Preparatory schools in Qatar offering British, American and Indian curriculum are amongst the top three in almost all municipalities in Qatar. Apart from Al Rayyan and Doha, British curriculum schools are also popular in Ash-Shahaniyah, Umm Salal and Al Khor & Al Dhakira. The municipalities of Al Daayen and Al Rayyan have a higher share of other schools offering curriculums like German, Iranian, Bangladesh, Turkish, Canadian and Finnish. In Table 11, the cells highlighted in green represent schools operating at a capacity utilization of 95% and above in their respective municipalities. A high capacity utilization indicates that there is high demand for these curriculums and show a high potential for setting up new schools offering similar curriculums in these municipalities.



Table 18: Preparatory - Location and Curriculum for Private Schools, 2018-19

Preparatory - Location and Curriculum for Private Schools, 2018-19							
Location	British	IB	American	Indian	National Standard	Others	Total Total
<b>Al Rayyan</b>							
Schools	16	4	3	6	4	20	53
Seats	4,511	1,150	720	4,178	1,096	5,971	17,626
Enrolments	4,165	1,085	620	4,131	1,092	5,838	16,931
Utilization	92%	94%	86%	99%	100%	98%	96%
<b>Doha</b>							
Schools	12	4	8	2	2	9	37
Seats	3,797	690	2,047	491	610	3,067	10,702
Enrolments	3,710	489	1,962	491	603	2,941	10,196
Utilization	98%	71%	96%	100%	99%	96%	95%
<b>Umm Salal</b>							
Schools	1	-	-	1	-	-	2
Seats	91	-	-	313	-	-	404
Enrolments	62	-	-	312	-	-	374
Utilization	68%	-	-	100%	-	-	92%
<b>Al Daayen</b>							
Schools	1	1	-	-	-	2	4
Seats	58	229	-	-	-	310	597
Enrolments	58	229	-	-	-	225	512
Utilization	100%	100%	-	-	-	73%	86%

Preparatory - Location and Curriculum for Private Schools, 2018-19							
Location	British	IB	American	Indian	National Standard	Others	Total Total
<b>Al Wakrah</b>							
Schools	4	-	3	4	-	-	11
Seats	996	-	787	1727	-	-	3,510
Enrolments	677	-	617	1663	-	-	2,957
Utilization	68%	-	78%	96%	-	-	84%
<b>Al Khor and Al Dhakira</b>							
Schools	3	-	2	1	-	-	6
Seats	1,102	-	436	270	-	-	1,808
Enrolments	731	-	291	235	-	-	1,257
Utilization	66%	-	67%	87%	-	-	70%
<b>Ash-Shahaniyah</b>							
Schools	1	-	-	-	-	-	1
Seats	649	-	-	-	-	-	649
Enrolments	202	-	-	-	-	-	202
Utilization	31%	-	-	-	-	-	31%
<b>Total</b>							
Schools	38	9	16	14	6	31	114
Seats	11,204	2,069	3,990	6,979	1,706	9,348	35,296
Enrolments	9,605	1,803	3,490	6,832	1,695	9,004	32,429
Utilization	86%	87%	87%	98%	99%	96%	92%

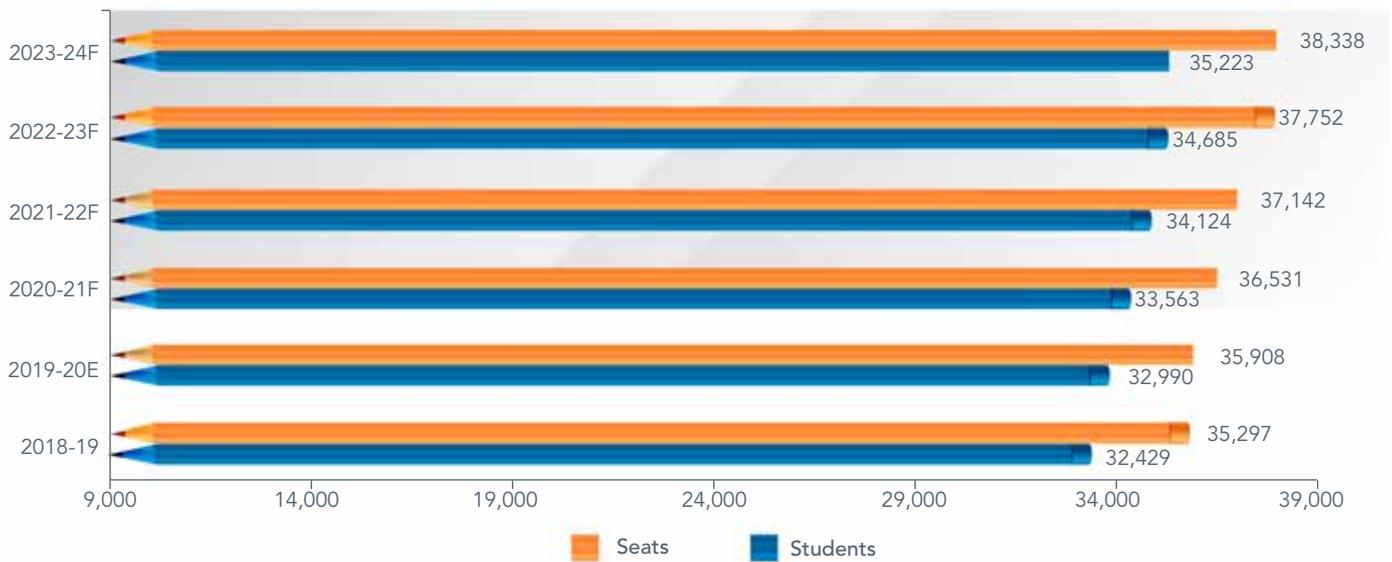
Source: Team Analysis based on data from MEHE



### 6.1.5. Preparatory Schools Demand and Supply Forecast

Student enrolments in school is a key indicator for demand, while the total availability of seats is an indicator for supply.

**Chart 41: Preparatory Schools Demand (Private) –Supply Forecast, 2018-19 - 2023-24**

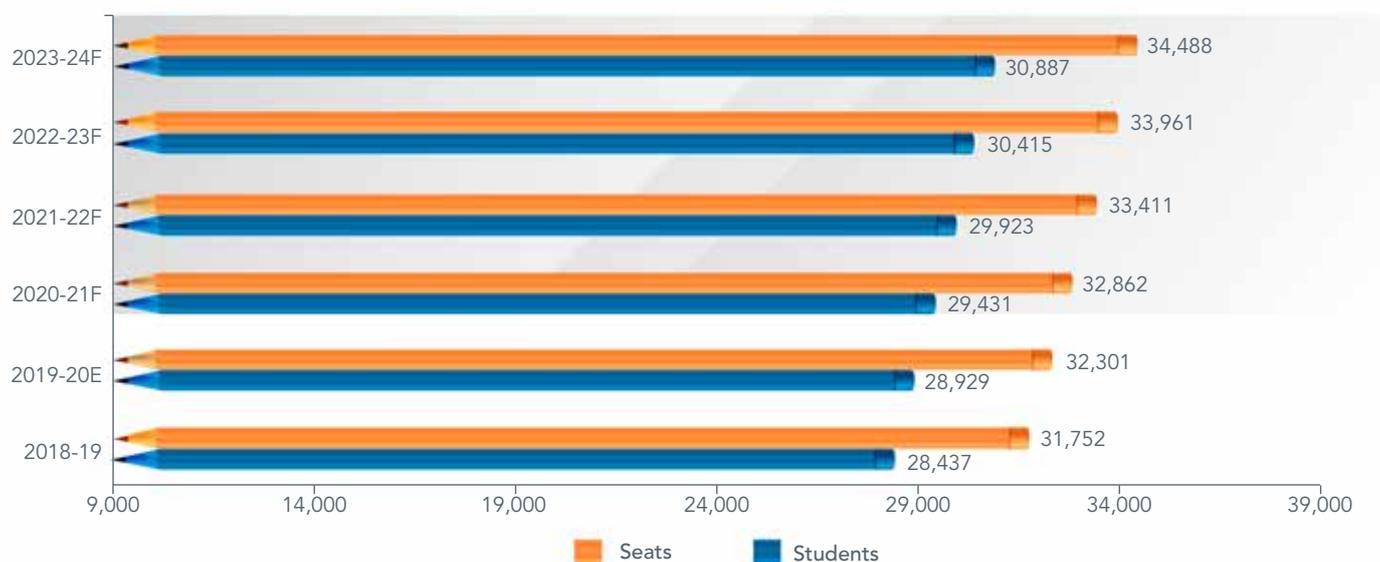


Source: Analysis based on MEHE and Primary Interviews

The total student enrolments in private preparatory schools is projected to reach 35,223 by 2023-24 from 32,429 in 2018-19, growing at a CAGR of 1.7%. Total seats are projected to reach 38,338 seats by 2023-24 from 35,297 in 2018-19, growing at a CAGR of 1.7%.



Chart 42: Preparatory Schools Demand (Public) –Supply Forecast, 2018-19 - 2023-24



Source: Analysis based on MEHE and Primary Interviews

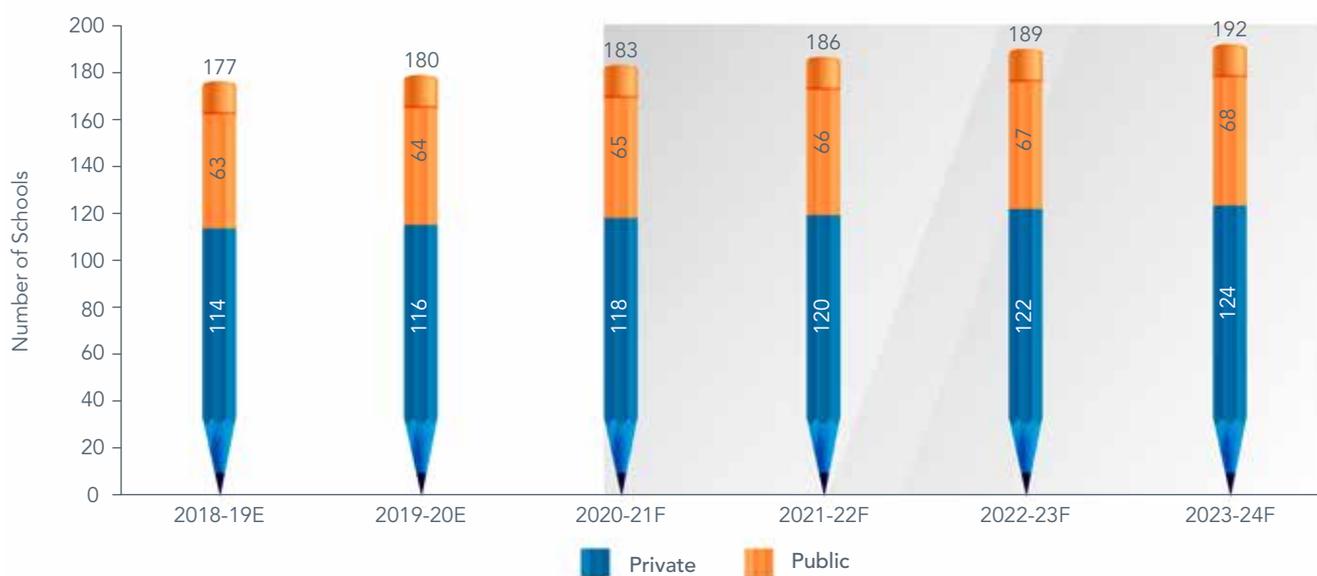
The total student enrolments in public preparatory schools is projected to reach 30,887 by 2023-24 from 28,437 in 2018-19, growing at a CAGR of 1.7%. Total seats are projected to reach 34,488 seats by 2023-24 from 31,752 in 2018-19, growing at a CAGR of 1.7%

#### Assumptions

Student population projections is determined based on the population estimates as per age group provided by the World Bank, which corresponds to the specific age group of students in each academic year. The average number of students enrolled per school has been used as a benchmark to estimate the number of schools until 2023-24.



Chart 43: Total Number of Preparatory Schools Forecast, 2018-19 - 2023-24



Source: Team Analysis based on data from MEHE and Primary Interviews

### Assumptions

Student population projections is determined based on the population estimates as per age group provided by the World Bank, which corresponds to the specific age group of students in each academic year. The average number of students enrolled per school has been used as a benchmark to estimate the number of schools until 2023-24.

Total number of preparatory schools is projected to grow at a CAGR of 1.7% between 2018-19 and 2023-24. The steady growth in local and expatriate population combined with the increase in the number of private education institutions will drive the growth in the education sector in Qatar. Private schools are expected to grow at a faster rate in comparison to public schools between 2018-19 and 2023-24 and account for a majority of share of the preparatory schools.

Chart 44: Preparatory Schools by Curriculum, 2018-19 to 2023-24



Source: Team Analysis based on data from MEHE Interviews

There are about 114 schools in 2018-19 which is projected to reach 124 schools by 2023-24. British curriculum preparatory schools are highest in numbers compared to other curriculum schools with 38 schools currently in 2018-19 which is projected to reach 41 schools by 2023-24.



Table 19: Preparatory Seats and Enrolments by Curriculum, 2018-19 to 2023-24

Preparatory Seats and Enrolments by Curriculum, 2018-19 to 2023-24				
Curriculum	2018-19		2023-24	
	Enrolments	Seats	Enrolments	Seats
British	9,605	11,204	10,433	12,169
American	3,490	3,990	3,791	4,334
Indian	6,832	6,979	7,421	7,580
National Standard	1,695	1,707	1,841	1,854
IB	1,803	2,069	1,958	2,247
Others	9,004	9,348	9,780	10,153
<b>Total</b>	<b>32,429</b>	<b>35,297</b>	<b>35,223</b>	<b>38,338</b>

Source: Team Analysis based on data from MEHE

British curriculum is the most preferred option, therefore maximum number of enrolments are within British schools followed by Indian and American schools. Total number of seats is expected to witness a growth from 35,297 in 2018-19 to 38,338 seats in 2023-24 having enrolments of 32,429 students in 2018-19 to 35,223 students in 2023-24.

Chart 45: Preparatory Schools by Location, 2018-19 to 2023-24



Source: Team Analysis based on data from MEHE

Doha being the hub of expat population and Al Rayyan being the closest to Doha, have resulted in maximum number of pre-primary schools preferring to set up operations in both these areas. Opportunities for new schools also exist in Al Wakrah and Al Khor. The total number of schools is expected to witness a growth from 114 schools in 2018-19 to 124 schools in 2023-24.



Table 20: Preparatory Seats and Enrolments by Location 2018-19 to 2023-24

Preparatory Seats and Enrolments by Location 2018-19 to 2023-24				
Locations	2018-19		2023-24	
	Enrolments	Seats	Enrolments	Seats
Al Daayen	512	597	556	649
Al Khor and Al Dhakira	1,257	1,808	1,365	1,964
Al Rayyan	16,931	17,626	18,390	19,145
Al Wakrah	2,957	3,510	3,212	3,813
Ash-Shahaniyah	202	649	219	705
Ash-shamal	-	-	-	-
Doha	10,196	10,702	11,075	11,624
Umm Salal	374	404	406	439
<b>Total</b>	<b>32,429</b>	<b>35,297</b>	<b>35,223</b>	<b>38,338</b>

Source: Team Analysis based on data from MEHE

British curriculum is the most preferred option, therefore maximum number of enrolments are within British schools followed by Indian and American schools. Total number of seats is expected to witness a growth from 35,297 in 2018-19 to 38,338 seats in 2023-24 having enrolments of 32,429 students in 2018-19 to 35,223 students in 2023-24.

#### 6.1.6. Key Takeaways

- There are 177 schools offering preparatory education growing at a CAGR of 4.5% between 2012-13 and 2018-19
- The share of private schools increased from 59% in 2012-13 to 64% in 2018-19, driven by increase in expat population
- A total of 41 preparatory educational schools were added during the period of 2012-13 and 2018-19, these included 34 private and 7 public schools
- British curriculum schools are popular in Ash-Shahaniyah, Umm Salal and Al Khor & Al Dhakira, on the other hand Al Daayen and Al Rayyan have a higher share of schools like German, Iranian, Bangladesh, Turkish, Canadian and Finnish
- Private preparatory schools have grown at a CAGR of 8.2% whereas public schools have grown at a CAGR of 4.2% between 2013 and 2019
- British, American, Indian and National Standards curriculum schools are in high demand in Doha, while Indian and National Standards curriculum schools are in high demand in Al Rayyan
- Several preparatory schools are operating in the municipalities of Al Rayyan, followed by Doha and Al Wakrah. British, IB, Indian and American schools have an opportunity to open in Al Rayyan. Similarly, British and American schools have an opportunity to open in Doha. Opportunities exist for 10 new private schools to open by 2023-24.

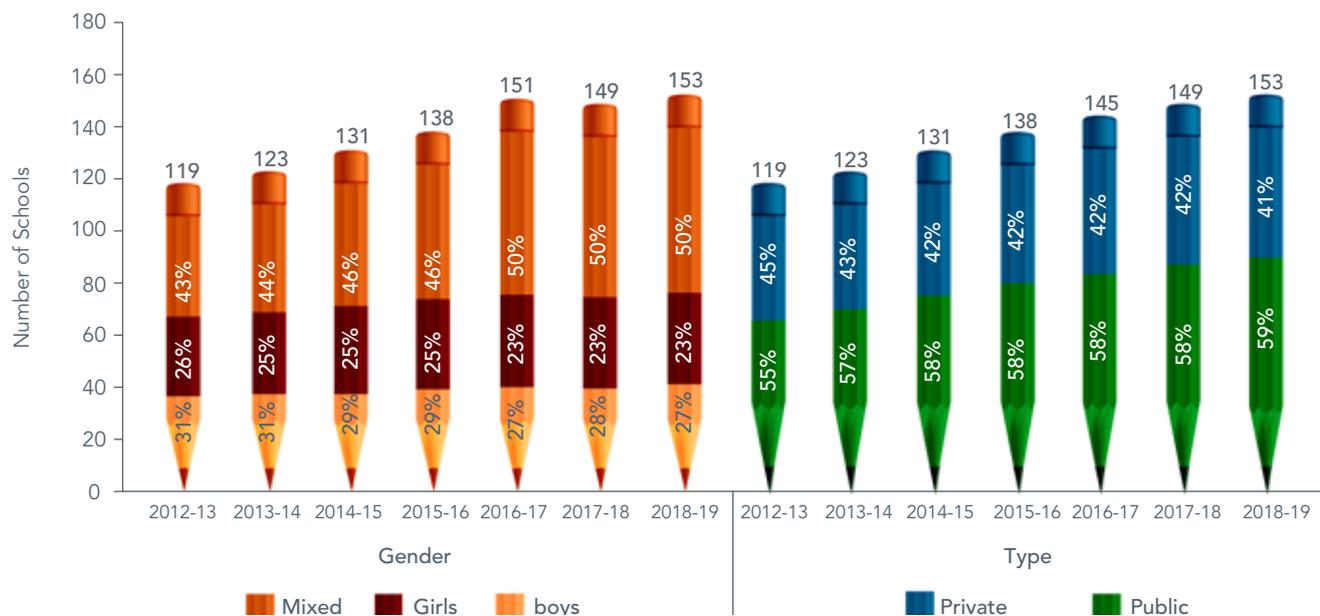


## 6.2. Secondary Level

### 6.2.1. Secondary Schools Supply Analysis

A total of 153 schools offering secondary education were operational in 2018-19 these include 42 female-only, 35 male-only and 75 mixed schools. The number of secondary schools increased from 119 in 2012-13 to 153 in 2018-19, growing at a CAGR of 4.3% during this period. The share of boys-only and girls-only schools which includes public schools as well as private schools have declined marginally during the period of 2012-13 and 2018-19. However, mixed schools which are mainly private schools have shown an increase from 43% share in 2013 to 48% share in 2019. During the period of 2012-13 and 2018-19, 34 new schools were added, out of which 21 schools were from the mixed school's category and 28 private and 6 public schools.

Chart 46: Total Number of Secondary Schools by Gender mix and Type, 2012-13 - 2018-19



Source: Team Analysis based on data from MEHE

The growth in the number of private schools increased at a CAGR of 6.1% and public schools growing at a CAGR of 1.7% between 2012-13 and 2018-19. The share of private schools increased from 55% in 2013 to 61% in 2019.



Chart 47: Secondary - Schools by Type, Private and Public, 2012-13 - 2018-19



Source: Team Analysis based on data from MEHE



### 6.2.2. Secondary School Teachers

The number of secondary school teachers increased from 3,975 teachers in 2012-13 to 5,038 teachers in 2018-19, growing at a CAGR of 4% during this period. Between 2012-13 and 2018-19, the number of private teachers grew at a CAGR of 4.5%, while public teachers grew at a CAGR of 3.1%. The share of total number of teachers in private and public schools has remained almost the same since the past five years.

Chart 48: Secondary Teachers by Type of School, Public and Private, 2012-13 - 2018-19

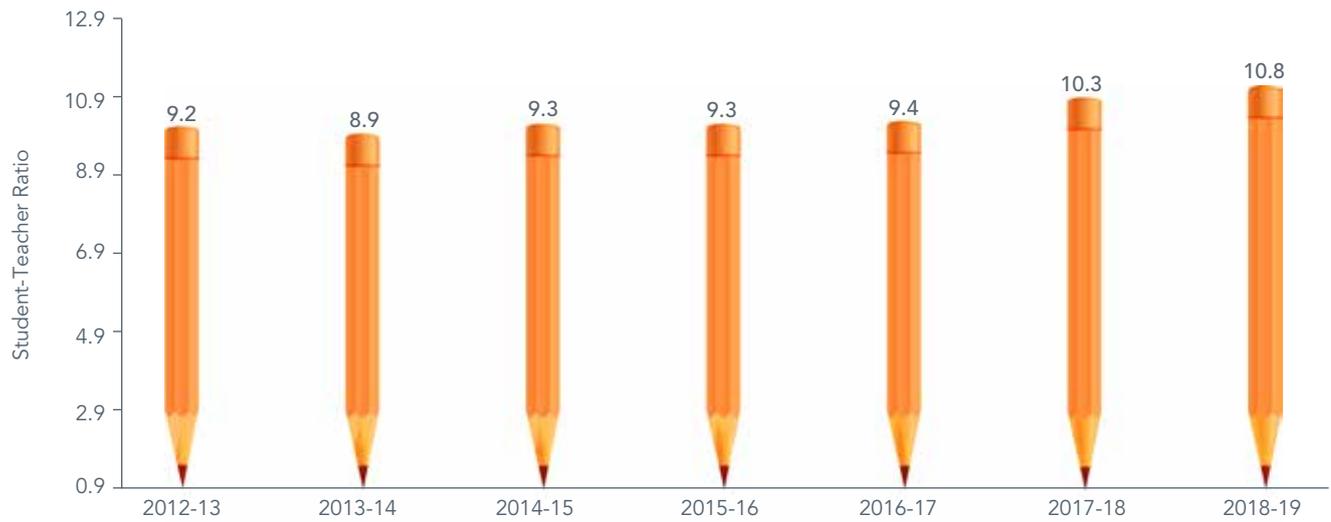


Source: Team Analysis based on data from MEHE

Teacher population calculations and projections are estimated based on the trend of Student to Teacher ratio (10.22) which is replicated to estimate the total number of teachers in 2018-19. The number of students for 2017-18 and 2018-19 is provided by Ministry of Education and Higher Education.



Chart 49: Secondary: Student to Teacher Ratio, 2012-13 - 2018-19



Source: Team Analysis based on data from MEHE



### 6.2.3. Secondary Schools Demand Analysis

Student enrolment in secondary schools increased from 36,576 enrolments in 2012-13 to 51,491 enrolments in 2018-19, growing at a CAGR of 5.9% during this period. Student enrolment in private schools grew at a CAGR of 9.6%, while enrolments in public schools grew at a CAGR of 3.3% between 2012-13 and 2018-19. The share of students in private schools has increased from 37% share in 2012-13 to 46% share in 2018-19.

Chart 50: Student Enrolment in Secondary by type and Nationality, 2012-13 - 2018-19



Source: Team Analysis based on data from MEHE

Enrolment of non-Qatari students increased from 20,588 students in 2012-13 to 32,656 students in 2018-19, growing at a CAGR of 8%, while enrolment of Qatari students grew from 15,988 in 2012-13 to 18,835 in 2018-19 at a CAGR of 2.8% during this period. Non-Qatari student enrolments accounted for 63% of the total enrolments during 2018-19.

#### 6.2.4. Gross Enrolment Ratio

Gross Enrolment Ratio (GER) has shown a constant increase since 2012-13 till date. GER increased significantly from 94% in 2012-13 to 100% in 2018-19 for Non-Qatari and increase from 96.8 in 2012-13 to 100.1 in 2018-19 for Qatari. Similarly, Net enrolment rate has also increased within similar period.

**Table 21: Gross Enrolment Ratio in Secondary Schools, 2012-13 - 2018-19**

Gross Enrolment Ratio in Secondary Schools, 2012-13 - 2018-19				
Years	Gross Enrolment Rate		Net Enrolment Rate	
	Qatari	Non-Qatari	Qatari	Non-Qatari
2012-13	96.8	94	76.7	75.9
2013-14	92.7	98.4	74.4	80.5
2014-15	95.8	97	76.3	78.8
2015-16	98.9	92.9	76.8	75
2016-17	99.9	97.8	76.6	79.2
2017-18	100.1	100	77.6	81.6

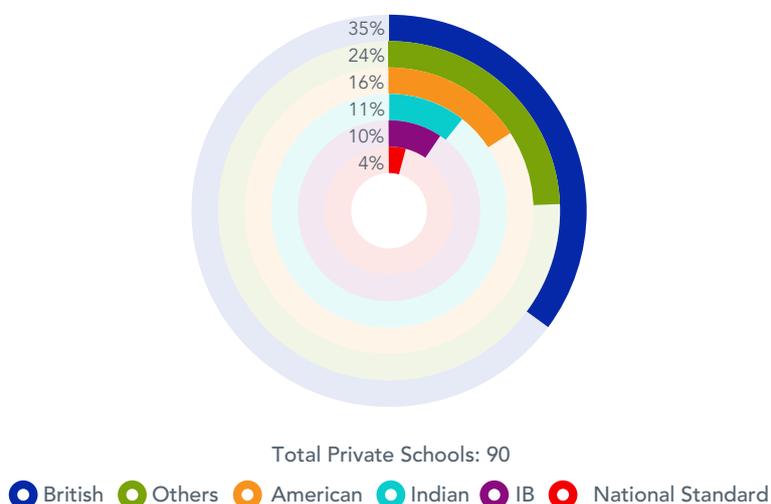
Source: Team Analysis based on data from MEHE

In 2018-19, Al Rayyan had the maximum student intake with about 52,940 seats and 50,215 enrolments followed by Doha with about 35,647 seats and 33,632 enrolments, while Al Wakrah had 11,000 seats and 9,094 enrolments.

#### 6.2.5. Curriculum Analysis

About 35% of the private secondary schools provide British curriculum followed by American curriculum schools with 16% share, Indian curriculum and IB schools with 10% share each. Other curriculums like German, Iranian, Bangladesh, Turkish, Canadian, Finnish, etc. together accounted for 24% share.

**Chart 51: Secondary Schools - Curriculum Analysis, 2018-19**

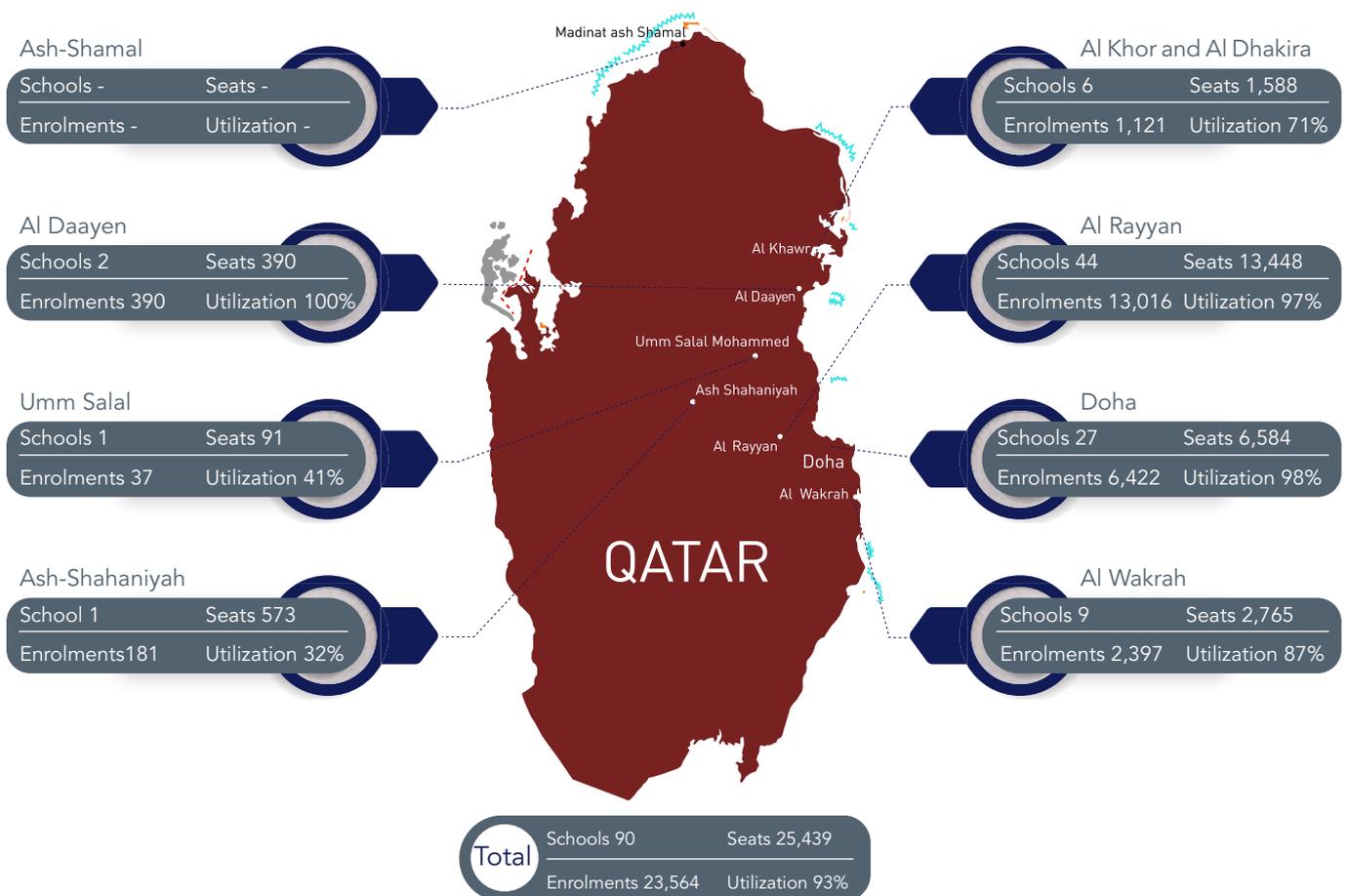


Source: Team Analysis based on data from MEHE and Primary Interviews

### 6.2.6. Secondary Schools Location Analysis

Secondary education has a special importance as it coincides with the intermediate and late stage of adolescence for boys and girls. A total of 153 secondary schools (90 private and 63 public) are spread across different municipalities in Qatar. Most of the secondary schools are concentrated in the Al Rayyan, Doha and Al Wakrah municipality. About 44% of the total secondary schools are based in the municipality of Al Rayyan, 28% are based in Doha, while 9% are based in Al Wakrah.

Figure 13: Region wise Distribution of Private Secondary Schools



Location	Al Rayyan	Doha	Umm Salal	Al Daayen	Al Wakrah	Al Khor and Al Dhakira	Ash-Shamal	Ash-Shahaniyah	Total
Schools	44	27	1	2	9	6	-	1	90
Seats	13,448	6,584	91	390	2,765	1,588	-	573	25,439
Enrolments	13,016	6,422	37	390	2,397	1,121	-	181	23,564
Utilization	97%	98%	41%	100%	87%	71%	-	32%	93%

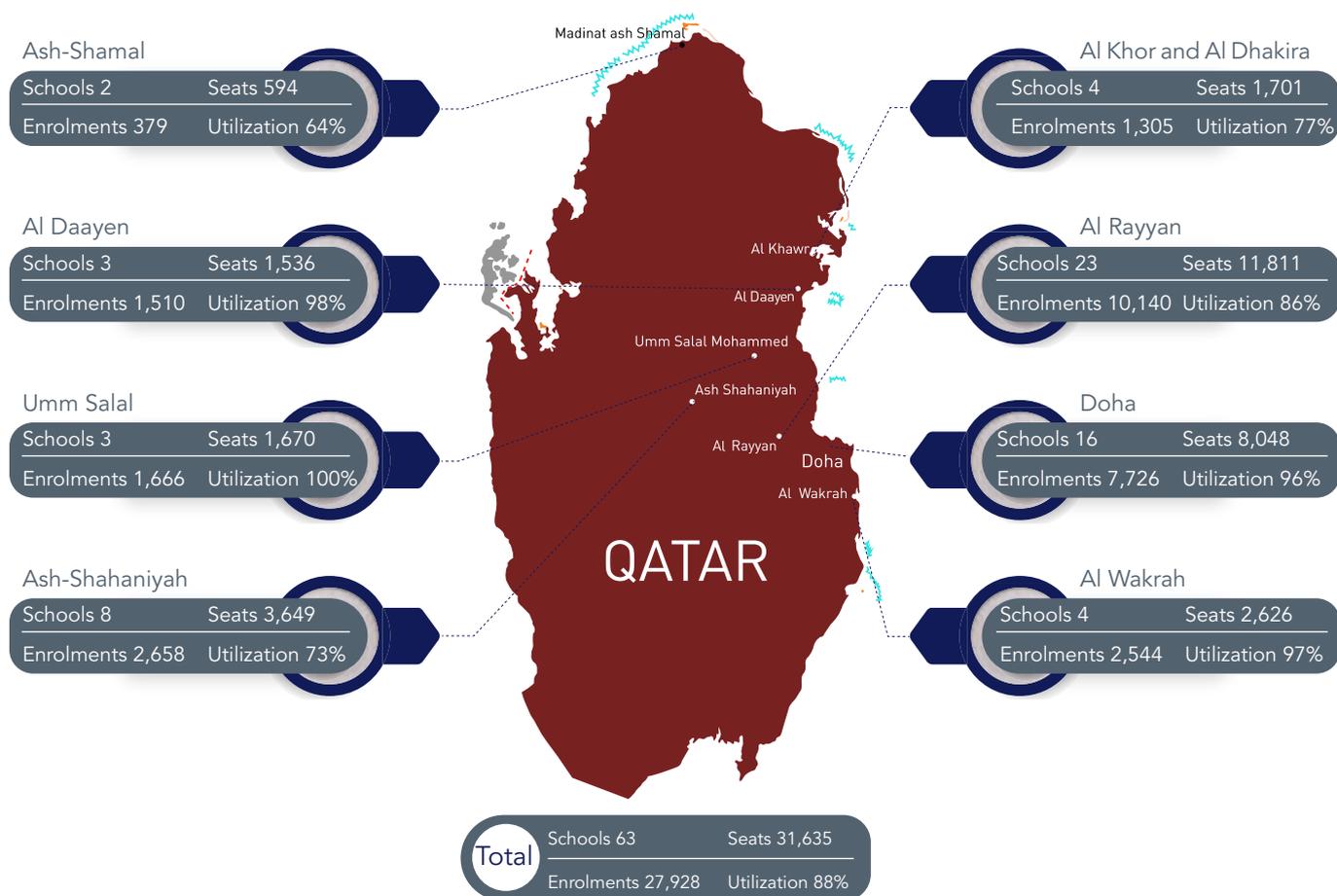
Source: Team Analysis based on data from MEHE

There are 44 private secondary schools in Al Rayyan with total seating capacity of 13,448 and total student enrolments of 13,016 in 2018-19, indicating a capacity utilization of 97%. There are 27 private secondary schools in Doha with total seating capacity of 6,584 and total student enrolments of 6,422 in 2018-19, indicating a capacity utilization of 98%.

Private secondary schools in the municipalities of Doha, Al Rayyan and Al Daayen have reached almost full capacity indicating high potential of setting up new private secondary schools in these municipalities to cater to the growing demand.



Figure 14: Region wise Distribution of Public Secondary Schools



Location	Doha	Al Rayyan	Umm Salal	Al Daayen	Al Wakrah	Al Khor and Al Dhakira	Ash-Shamal	Ash-Shahaniyah	Total
Schools	16	23	3	3	4	4	2	8	63
Seats	8,048	11,811	1,670	1,536	2,626	1,701	594	3,649	31,635
Enrolments	7,726	10,140	1,666	1,510	2,544	1,305	379	2,658	27,928
Utilization	96%	86%	100%	98%	97%	77%	64%	73%	88%

Source: Team Analysis based on data from MEHE

There are 23 public secondary schools in Al Rayyan with total seating capacity of 11,811 and total student enrolments of 10,140 in 2018-19, indicating a capacity utilization of 86%. There are 16 public secondary schools in Doha with total seating capacity of 8,048 and total student enrolments of 7,726 in 2018-19, indicating a capacity utilization of 96%.

Public secondary schools in the municipalities of Doha, Al Wakrah, Umm Salal Muhammed and Al Daayen have reached almost full capacity indicating a potential for setting up new public secondary schools in these municipalities.



Table 22: Private and Public Schools for Secondary, 2018-19

Private and Public Schools for Secondary, 2018-19				
Location	Private	Public	Total (%)	Total
Al Daayen	2%	5%	3%	5
Al Khor and Al Dhakira	6%	6%	6%	10
Al Rayyan	49%	37%	44%	67
Al Wakrah	11%	6%	9%	14
Ash-Shahaniyah	1%	13%	6%	9
Ash-shamal	0%	3%	1%	2
Doha	30%	25%	28%	43
Umm Salal	1%	5%	3%	4
<b>Grand Total</b>	<b>90</b>	<b>63</b>	<b>100%</b>	<b>153</b>

Source: Team Analysis based on data from MEHE

Secondary schools in Qatar offering British, American and Indian curriculum are amongst the top 3 in almost all municipalities (except Al Daayen) in Qatar. Apart from Al Rayyan and Doha, British curriculum schools are also popular in Ash-Shahaniyah and Umm Salal. The municipalities of Al Daayen, Al Rayyan and Doha have a higher share of other schools offering curriculums like German, Iranian, Bangladesh, Turkish, Canadian and Finnish. In A high capacity utilization indicates that there is high demand for these curriculums and show a high potential for setting up new schools offering similar curriculums in these municipalities.

Table 23. Secondary - Location and Curriculum Analysis for Private Schools, 2018-19

Secondary - Location and Curriculum Analysis for Private Schools, 2018-19							
Location	British	IB	American	Indian	National Standard	Others	Total
<b>Doha</b>							
Schools	8	4	8	-	1	6	27
Seats	1,591	190	2,047	-	448	2,308	6,584
Enrolments	1,538	189	2,001	-	442	2,252	6,422
Utilization	97%	99%	98%	-	99%	98%	98%
<b>Al Rayyan</b>							
Schools	16	4	2	4	3	15	44
Seats	3,096	1,100	520	3,000	760	4,972	13,448
Enrolments	2,953	1,085	466	2,970	754	4,788	13,016
Utilization	95%	99%	90%	99%	99%	96%	97%
<b>Al Daayen</b>							
Schools	-	1	-	-	-	1	2
Seats	-	229	-	-	-	161	390
Enrolments	-	229	-	-	-	161	390
Utilization	-	100%	-	-	-	100%	100%
<b>Al Wakrah</b>							
Schools	3	-	2	4	-	-	9
Seats	466	-	330	1,969	-	-	2,765
Enrolments	272	-	260	1,865	-	-	2,397
Utilization	58%	-	79%	95%	-	-	87%

Secondary - Location and Curriculum Analysis for Private Schools, 2018-19							
Location	British	IB	American	Indian	National Standard	Others	Total
Al Khor and Al Dhakira							
Schools	3	-	2	1	-	-	6
Seats	882	-	436	270	-	-	1,588
Enrolments	595	-	291	235	-	-	1,121
Utilization	67%	-	67%	87%	-	-	71%
Ash-Shahaniyah							
Schools	1	-	-	-	-	-	1
Seats	573	-	-	-	-	-	573
Enrolments	181	-	-	-	-	-	181
Utilization	32%	-	-	-	-	-	32%
Total							
Schools	32	9	14	9	4	22	90
Seats	6,699	1,519	3,333	5,239	1,208	7,441	25,439
Enrolments	5,576	1,503	3,018	5,070	1,196	7,201	23,564
Utilization	83%	99%	91%	97%	99%	97%	93%

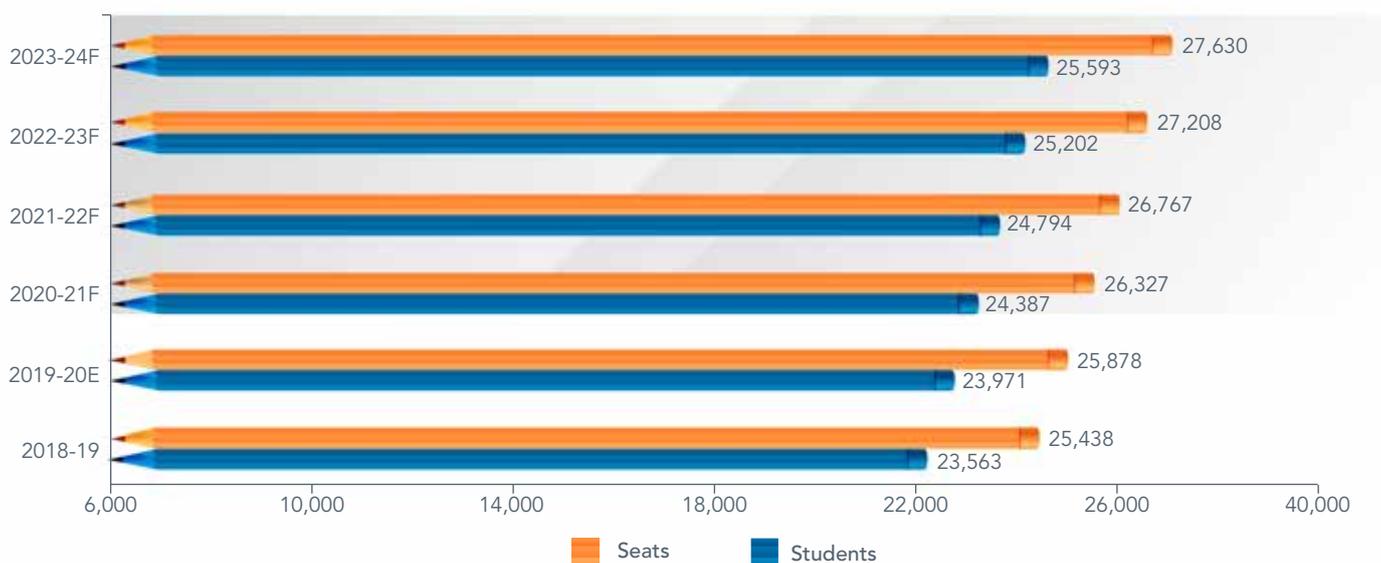
Source: Team Analysis based on data from MEHE



### 6.2.7. Secondary Schools Demand–Supply Forecast

Student enrolments in school is a key indicator for demand, while the total availability of seats is an indicator for supply.

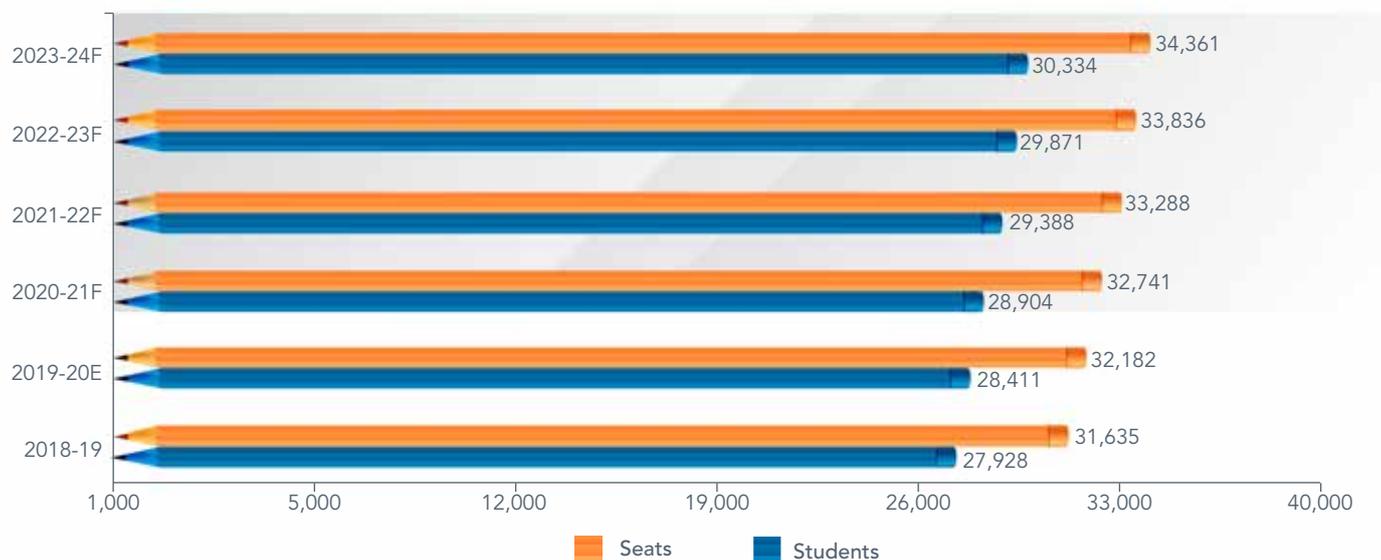
**Chart 52: Secondary Schools Demand (Private)–Supply Forecast, 2018-19 - 2023-24**



Source: Team Analysis based on data from MEHE and Primary Interviews

The total student enrolments in private secondary schools is projected to reach 25,593 by 2023-24 from 23,563 in 2018-19, growing at a CAGR of 1.7%. Total seats are projected to reach 27,630 seats by 2023-24 from 25,438 in 2018-19, growing at a CAGR of 1.7%.

**Chart 53: Secondary Schools Demand (Public)–Supply Forecast, 2018-19 - 2023-24**



Source: Team Analysis based on data from MEHE and Primary Interviews



The total student enrolments in secondary schools is projected to reach 30,334 by 2023-24 from 27,928 in 2018-19, growing at a CAGR of 1.7%. Total seats are projected to reach 34,361 seats by 2023-24 from 31,635 in 2018-19, growing at a CAGR of 1.7%.

### Assumptions

Student population projections is determined based on the population estimates as per age group provided by the World Bank, which corresponds to the specific age group of students in each academic year. The average number of students enrolled per school has been used as a benchmark to estimate the number of schools until 2023-24.

Chart 54: Total Number of Secondary Schools Forecast, 2018-19 - 2023-24

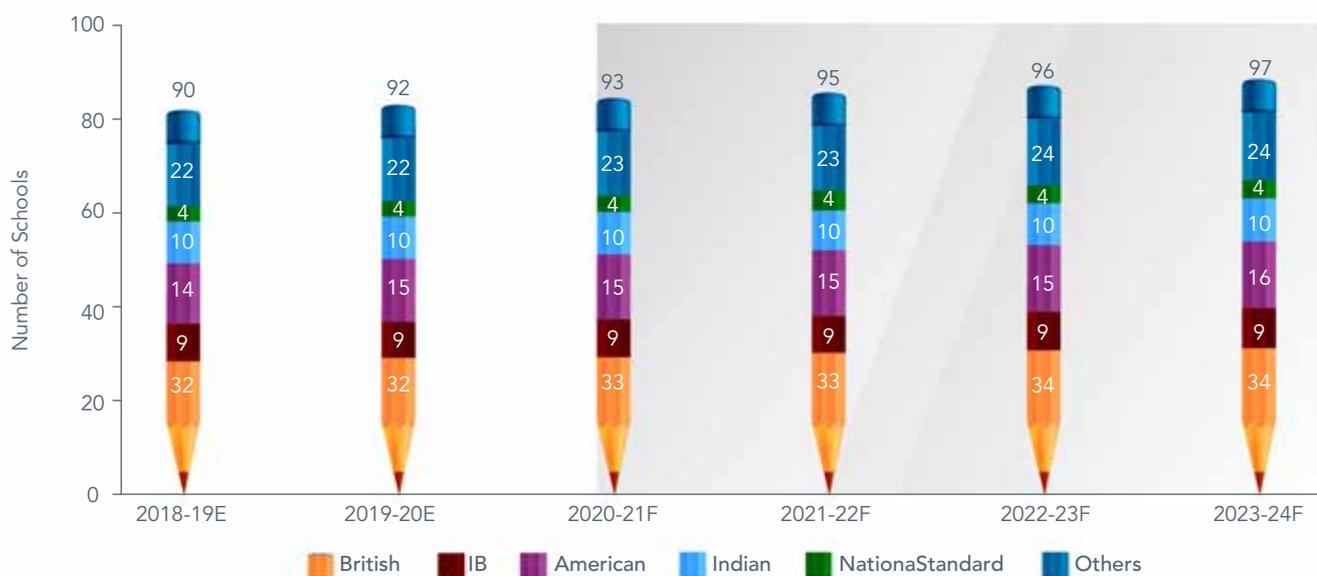


Source: Team Analysis based on data from MEHE

Total number of secondary schools is projected to grow at a CAGR of 1.7% between 2018-19 and 2023-24.



Chart 55: Secondary Schools by Curriculum, 2018-19 - 2023-24



Source: Team Analysis based on data from MEHE

There are about 90 schools in 2018-19 which is projected to reach 98 schools by 2023-24. British curriculum secondary schools are highest in numbers compared to other curriculum schools with 32 schools in 2018-19 and are projected to reach 34 schools by 2023-24.

Table 24: Secondary Seats and Enrolments by Curriculum, 2018-19 - 2023-24

Secondary Seats and Enrolments by Curriculum, 2018-19 - 2023-24				
Locations	2018-19		2023-24	
	Enrolments	Seats	Enrolments	Seats
British	5,576	6,699	6,056	7,276
American	3,018	3,333	3,278	3,620
Indian	5,070	5,239	5,507	5,690
National Standard	1,195	1,207	1,298	1,311
IB	1,503	1,519	1,633	1,650
Others	7,201	7,441	7,821	8,082
<b>Total</b>	<b>23,563</b>	<b>25,438</b>	<b>25,593</b>	<b>27,630</b>

Source: Team Analysis based on data from MEHE

British curriculum is most preferred amongst other curriculums, therefore maximum number of enrolments are in British schools followed by Indian and American. Total number of seats is expected to witness a growth from 25,438 seats in 2018-19 to 27,630 seats in 2023-24 having enrolments of 23,563 students in 2018-19 to 25,593 students in 2023-24.

Chart 56: Secondary Schools by Location, 2018-19 - 2023-24



Source: Team Analysis based on data from MEHE

The total number of schools is expected to witness a growth from 90 schools in 2018-19 to 98 schools by 2023-24. Doha and Al Rayyan are the hub of maximum Qatari families and expats, as a result there are higher number of secondary schools situated in both the areas.

Table 25: Secondary Seats and Enrolments by Location, 2018-19 - 2023-24

Secondary Seats and Enrolments by Location, 2018-19 - 2023-24				
Locations	2018-19		2023-24	
	Enrolments	Seats	Enrolments	Seats
Al Daayen	390	390	424	424
Al khor and Al Dhakira	1,121	1,588	1,218	1,725
Al Rayyan	13,016	13,448	14,137	14,606
Al Wakrah	2,397	2,765	2,603	3,003
Ash-Shahaniyah	181	573	196	622
Ash-shamal	-	-	-	-
Doha	6,422	6,584	6,975	7,151
Umm Salal	37	91	40	99
<b>Total</b>	<b>23,563</b>	<b>25,438</b>	<b>25,593</b>	<b>27,630</b>

Source: Team Analysis based on data from MEHE

The number of seats is projected to increase from 25,438 seats in 2018-19 to 27,630 seats in 2023-24 having enrolments of 23,564 students in 2018-19 to 25,593 students in 2023-24 respectively. In 2018-19, Al Rayyan had the maximum student intake with about 13,448 seats and 13,016 enrolments, followed by Doha with about 6,584 seats and 6,422 enrolments in 2018-19, whereas Al Wakrah had 2,765 seats and 2,397 enrolments (in 2018-19).



#### 6.2.8. Key Takeaways

- There are 153 schools offering secondary education growing at a CAGR of 4.3% between 2012-13 and 2018-19
- Private schools have increased at a CAGR of 6.1% and public schools growing at a CAGR of 1.7% between 2012-13 and 2018-19
- Student enrolment in private schools grew at a CAGR of 9.6%, showing an increased in the share of student in private secondary schools from 37% share in 2012-13 to 46% share in 2018-19
- Several preparatory schools are operating in the municipalities of Al Rayyan, followed by Doha. British and American schools have an opportunity to open in Al Rayyan and Doha. Opportunities exist for 8 new private school to open by 2023-24
- Eight upcoming private school are likely to open by 2023-24, British curriculum secondary schools being the most preferred are projected to reach 34 schools in 2023-24 from 32 schools in 2018-2019

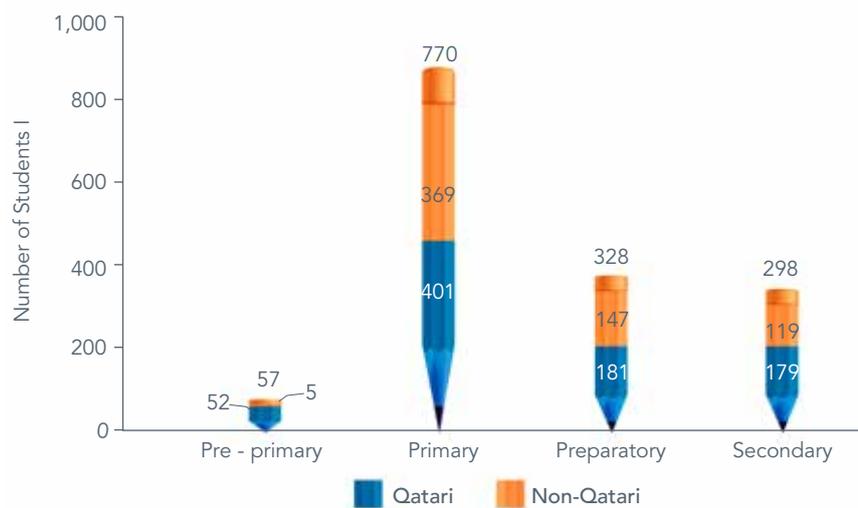


## 7. SCHOOL FOR SPECIAL NEEDS



Special Education is playing a very important role in understanding the varying abilities and diverse learning needs of children, preparing them to pursue a productive and meaningful life in society. This section addresses the developments made relating to the education of students with disabilities, including physical disabilities, hearing impairment, vision impairment, autism spectrum disorder, speech language disorders, deaf blind disabilities and multiple impairments. The Ministry of Education and Higher Education adapts the curricula and tests for students with such disabilities and takes an initiative to develop schools of integration.

**Chart 57: Total Special Needs Students in public schools by Nationality (2018)**



Source: Team Analysis based on data from PSA and Primary Interviews

Total Special Needs student population (age 4 and above) in public schools was 1,453 in 2018. Enrolment in primary sector is the highest with 770 students, which is around 53% of total students. Qatari students are more in number at all levels of education, contributing 91% in pre-primary, 52% in primary, 55% in preparatory and 60% in secondary.



## 7.1. Inclusive Education

The Qatar National Commission for UNESCO, Ministry of Education of the State of Qatar and UNESCO successfully organized a Policy Dialogue and Workshop on “Inclusive Education” in the State of Qatar. This was titled, “Equal right, equal opportunity, leaving no one behind”. The Ministry of Education has developed a national mainstreaming strategy under the national education strategy for children with disability that enables them to attend public and private schools along with enabled peers. Hence regular education classrooms are adopting special education programs to equip students with special needs to function in daily living and working environments. The following are the schools who admit such students.

Following is the list of few inclusive schools.

## 7.2. Pre-primary Schools

- I. Qatar Foundation’s Renad Academy: Renad Academy provides educational services to children with autism spectrum disorder. The academy currently only accepts Qatari nationals starting at 3 years of age.
- II. Child Development Centre (CDC): A comprehensive rehabilitation unit for children with mild to moderate disabilities, which includes a pre-integration program to prepare children from 3 to 6 years old to go to school.
- III. Al Nebras International Preschool (The Montessori Way): Al Nebras employs social workers specialized in psychiatry and provides one-on-one support to children. Pre- primary follows an open-door policy, whereby parents can walk in at any time to observe their child in their classroom.
- IV. Villa Kinderwelt: Villa Kinderwelt is a German pre-primary, they accept children with special needs on a case-by-case basis, following an individual assessment. Children of ages 3 to 5 can take admission.

## 7.3. Primary and Secondary Schools

- I. GEMS American Academy Qatar: GEMS support students with a range of learning differences, including autism spectrum disorder, learning disabilities such as dyslexia or dyscalculia and general learning delays.
- II. King’s College Doha: They meet the needs of students with learning disabilities such as mild autism spectrum disorder, Asperger syndrome and social difficulties, dyslexia and Down syndrome.
- III. Lycée Bonaparte: They accept children with learning disabilities and social difficulties. The school has several learning support assistants.
- IV. Phoenix Private School: The school accepts children with mild to moderate learning difficulties, social, emotional or behavioural difficulties, communication difficulties, and medical conditions that may affect education.

## 7.4. Dedicated Special Needs Centres

In the private sphere, there are a handful of centres that are entirely dedicated to children with special needs and have been emerging in Doha over the past few years to support families with services and assistance. The following is the list of few such dedicated centres:

- I. The Shalala Centre: The centre provides educational, rehabilitation, social, health, recreational and vocational services for students with disabilities. The centre offers a modified curriculum for students aged 3-21 years.
- II. Awsaj Academy: Qatar Foundation includes Awsaj Academy which tutors Grade 1–12 students with learning challenges in classes of 10 or lower. Teaching is in English, and the curriculum includes Maths, English, Science, Arabic, Islamic Studies, Qatar National History, Art and Physical Education. It also has an, outreach centre that provides evaluation and professional development services to the community.
- III. Child Development Centre (Al Dafna): CDC provides a



network of internationally qualified and licensed professionals who offer child-centered and evidence-based early detection and intervention for children with developmental delays.

- IV. Mind Institute: This centre is equipped to support children from birth to 18 years of age individuals with a wide range of developmental challenges. It offers holistic, non-medical, daily intervention programs as well as after-school programs in English, French and Arabic.
- V. Pro-Tem (Duhail): Pro-Tem provides assessments on children's needs, one-to-one teaching, as well as emotional support and insight into children's needs for parents and schools.
- VI. Omega Centre for Special Needs Education: Omega is a privately-run centre for special needs education that offers diagnostic, therapeutic and education services and aims to assist families whose children have psychiatric, physical, educational and social challenges.
- VII. Step by Step Centre for Special Needs: The centre provides a caring and stimulating environment to enable children, aged 3 – 16, with learning challenges to achieve their full academic and personal potential through specialised teaching in a school setting and individual therapy sessions.
- VIII. Al Hedaya Public School: Al Hedaya Public School is a specialized school for kindergarten students with disabilities

## 7.5. Key Takeaways

- Qatar's national policy states that every child should be provided with education to help it reach its full potential
- MEHE is committed to inclusive integration in education, learning and rehabilitation in accordance with their needs
- Schools and school systems have begun to move towards a supportive educational model that includes adaptation of teaching, learning and assessment practices to respond to all student learning need
- Schools in Qatar are changing, ensuring students with learning difficulties & disabilities are provided with equal possibilities for participation
- Several private centres providing educational facilities have set up operations in Qatar, these centres provide a wide range of special needs services that cater to the educational disabilities, physical disabilities, hearing impairment, vision impairment, autism, speech language and multiple impairments of students
- Government initiatives to encourage inclusive education at all levels as well as private sectors participation in setting up special needs centres is expected to augur well for this sector



## 8. LICENSING REQUIREMENTS

### 8.1. Licensing an Early Childhood School in Qatar

Education in Qatar is given utmost importance by the government in terms of investing in infrastructure and providing high quality educational services. Early Childhood schools are directly responsible for the safety, comfort and security of the children under their care.

Law No 1 of 2014 regulates the process of licensing and the operation of Early Childhood schools in Qatar. The Law gives the Ministry of Administrative Development, Labour and Social Affairs (the Ministry) the authority of supervising Early Childhood schools in Qatar and is the first Qatar law issued specifically in relation to Early Childhood schools in Qatar.

#### 8.1.1. Scope and Application of the Law

According to the Law “an Early Childhood school is a place designated for the care of children up to four years of age, whether run by public or private schools”. The Law provides existing Early Childhood schools a six-month period to comply with its requirements, which can be extended by a decision of the Minister of Labour and Social Affairs (the Minister) for a similar period. Early Childhood schools is strictly limited to women teachers. Early Childhood schools should be managed by a qualified female director, who will be responsible for all work at the place. They should also keep regular and updated records.

Article 24 of the Law states that the Minister shall issue necessary decisions for the implementation of the Law and existing decisions shall remain in effect to the extent they do not contradict with the provisions of the Law.

#### 8.1.2. Licensing Procedures and Requirements

To establish an Early Childhood school in Qatar, Article 6 of the Law provides that the applicant for a license must comply with the following conditions:

- An applicant should be at least 21 years old
- Have a good reputation and never have been convicted of a crime involving dishonesty or breach of trust.
- The applicant must make a deposit of QAR 100,000 with the Ministry of Administrative Development, Labour and Social Affairs. This amount will remain with the ministry and it will be refunded, after deducting any sums due, only when the licensee wishes to end all the activities of the Early Childhood concerned.
- The applicant must publish the data about the services to be provided beforehand
- An Early Childhood school license will be granted for a period of one year, extendable for similar period(s) if the licensee holder is successful in its application to extend and pays the appropriate fees. Fees payable under the Law shall be determined by a decision of the Minister issued from time to time



### 8.1.3. Management of an Early Childhood School

The Ministry of Administrative Development, Labour and Social Affairs will classify Early Childhood schools based on the qualifications of its staff and the fees. Each Early Childhood should adopt a distinctive name which should be approved by the ministry. The qualifications of the staff employed in the Early Childhood schools will be pertinent. The Minister shall issue a decision in relation the terms and restrictions concerning the premises of Early Childhood schools.

Only female employees may be employed to work in Early Childhood schools and their employment will be subject to the provisions of the Labour Law No 14 of 2004. Early Childhood schools should be managed by a qualified female director, who will be responsible for all work at the place. She will be aided by a female general supervisor, a female assistant supervisor, a dietician, a nurse, and a female physician, who can be a visiting specialist in paediatrics or general medicine. In addition, there should be adequate number of guards, cleaners, drivers and other necessary staff. Visiting doctors, as well as other employees who do not come into direct contact with the children, may be a man.

### 8.1.4. Supervision and Penalties

Qatar Early Childhood schools shall be supervised by the Ministry. Compliance with the Law and the designated classification conditions issued by the Ministry will be strictly enforced. The Ministry will issue a written warning for any Early Childhood which breaches the provisions of the Law on

the first occasion that a breach occurs, indicating the nature of the breach and requesting that the breach is rectified within a period to be specified in the warning. If the deduction is made the holder of the license must make a "top-up" payment to ensure that the deposit held is always an amount equal to QAR 10,000. Further, in the event of a breach, the Minister may at his discretion cancel an Early Childhood school license, place the Early Childhood school under a temporary management, close it down for a maximum of three months or downgrade its classification.

The Law provides that the following breaches are punishable by imprisonment for a period not exceeding two years and or a fine not exceeding QAR 100,000:

- Establishing, managing, transferring or modifying an Early Childhood school without prior authorization from the Ministry;
- Submitting false information or records requested by the Law;
- Transferring the Early Childhood school license without the Ministry's written approval; and/or
- Operating an Early Childhood school in contravention to its classification or any other requirements of the Ministry which may apply from time to time;

In addition to the above-mentioned penalties, the competent court may issue a decision to close the Early Childhood school on a temporary or permanent basis.



## 8.2. Setting up a School in Qatar

The following are the key aspects that need to be considered while setting up a school in Qatar.

**Table 26: Key Success Factors for Setting up a School for Children**

<p><b>A. Securing a designated space</b></p>	<ol style="list-style-type: none"> <li>1. Location of a school is of key importance within an area as it addresses factors such as distance, demographic market, industrial, commercial area and ease of accessibility.</li> <li>2. Schools should be strategically set up within an area where there is a demand for an education, board or curriculum.</li> <li>3. The geographical importance of setting up a school is not only related to convenience and proximity but also the availability of other facilities such as local libraries, recreation centres, etc.</li> </ol>
<p><b>B. Infrastructure and Facilities</b></p>	<ol style="list-style-type: none"> <li>1. The structural plan for a school infrastructure should have basic facilities such as adequate ventilation, washroom and restroom facilities, large classrooms etc.</li> <li>2. Schools should be adequately equipped with furniture suitable for children of different ages as well as teaching tools, monitors and electronic devices etc.</li> <li>3. Providing facilities like gymnasium, prayer room, cafeteria and laboratories increases the desirability of a school since it tends to provide all round development</li> </ol>
<p><b>C. Safety and security</b></p>	<ol style="list-style-type: none"> <li>1. The school must comply with security, safety and health requirements, and meet regulations of the Civil Defence Department.</li> <li>2. Ensuring the safety of students is the number one priority as it provides a secure learning environment and a trusted place for parents to leave their child during work hours.</li> <li>3. Out-of-school safety is a primary concern of parents, and secondary to enrichment which needs to be addressed during the setting up of a new school premises. It should be well equipped with the latest security amenities, as well as they should be scanned for health hazards daily.</li> </ol>
<p><b>D. Up-to-date Information Technology</b></p>	<ol style="list-style-type: none"> <li>1. Investing in building a technologically advanced after-school program has a variety of advantages like: <ul style="list-style-type: none"> <li>• Keeping students occupied and entertained</li> <li>• Easing common stresses that come with running an after-school program</li> <li>• Attracting the interest of young parents</li> </ul> </li> <li>2. The school should implement computer-based learning as per the curriculum.</li> <li>3. By making technology a focus and integrating operations, the staff will be able to focus on providing the students with an environment that promotes growth rather than spending too much time on the organizational clutter.</li> </ol>
<p><b>E. Marketing and Curriculum</b></p>	<ol style="list-style-type: none"> <li>1. The school should strategically promote itself depending upon the need of the market.</li> <li>2. Establishing the trust within the market by providing a prominent service on a strong foundation will create interest and demand within the market.</li> <li>3. Based on the design of the curriculum, code of conduct, discipline, dress code, ceremonies, traditions, honour system, reporting, co-curricular programs, timetable, etc. a school curriculum should be considered.</li> </ol>



**Table 27: Risk Factors for Setting up a School for Children**

<p><b>A. Competition and Political environment</b></p>	<ol style="list-style-type: none"> <li>1. The rising population and increase in the number of schools that are available with a wide range of curriculum to choose from proves to be a competitive risk factor for the success of any new school.</li> <li>2. Qatari students contribute to ~33% of overall student population, whereas expatriate has major share (~67%).</li> <li>3. Political stability is an important factor for the growth of expatriate population in the country.</li> </ol>
<p><b>B. Staffing</b></p>	<ol style="list-style-type: none"> <li>1. Keeping in mind the quality of curriculum and type of teachers that need to recruit, it is a tedious task to find within the same region.</li> <li>2. Due to increase in the number of students over the years, maintaining a student to teacher ratio that is suitable for the long-term survival of schools is important.</li> <li>3. Recent trends suggest that the average pupil-teacher ratio which Early Childhood schools maintain is 18</li> </ol>
<p><b>C. Safety and Security</b></p>	<ol style="list-style-type: none"> <li>1. Securing necessary planning and site permission, entering the building contract or starting on site as per plan.</li> <li>2. Keeping in mind that the premises are scanned and secured all the time.</li> <li>3. Making sure the school is set up in an area which is easily accessible, and transport is available throughout.</li> <li>4. All equipment relating to safety and security always need to be maintained and having an operator to access the same.</li> </ol>
<p><b>D. Local factors</b></p>	<ol style="list-style-type: none"> <li>1. Local Authorities play a vital role as their support and permission during setting up a school needs to be considered.</li> <li>2. Setting up of schools is also dependent on the upcoming housing development, area availability etc. which might lead to delays increasing an infrastructural set up.</li> </ol>



### 8.2.1. Licensing a Private School in Qatar

Table 28: Private School Licensing Conditions

Private School Licensing Conditions
Applicant should comply with the following general terms and conditions to have a private school license:
1. The licensee/applicant should meet the following conditions: <ol style="list-style-type: none"> <li>a. Applicant should be over 21 years old.</li> <li>b. Full civil qualification.</li> <li>c. Good conduct and reputation.</li> <li>d. Licensee or Any Board Member should not be employee or part of MEHE.</li> <li>e. No criminal and fraudulent record.</li> <li>f. Applicant should be involved in education field.</li> <li>g. Applicant's company should have been registered in Qatar or applicant's company is an international company that is not registered in Qatar.</li> </ol>
2. Applicant should have all necessary approvals from the country's relevant bodies.
3. Applicant should submit bank guarantee to one of the local banks. This bank bond should be also valid for payment in full throughout the licensing period in accordance with the regulations laid down by the Ministry of Education and Higher Education.
4. Licensing application should be submitted to MEHE with: <ol style="list-style-type: none"> <li>a. Detailing of school levels</li> <li>b. Proposed date of operation as per the template</li> </ol>
5. School should have unique name that should be approved by the competent authority.
6. School licensing will be completed in accordance with MEHE's requirements and plans considering the country's educational policies as well as MEHE's regulations and processes.
7. License cannot be transferred or waived to a third party without obtaining prior approval from the relevant authority.

## Private School Licensing Conditions

Applicant should comply with the following general terms and conditions to have a private school license:

8. No amendment/modifications to the license can be made without obtaining prior written approval from the Ministry of Education and Higher Education.
9. The private school should comply with MEHE's systems and regulations to ensure effective performance evaluation and whole school monitoring process.
10. The private school should provide MEHE with all necessary documents, information, data, and surveys in relation to education process
11. The Ministry of Education and Higher Education will undertake supervision, monitoring, inspection and control of all private school buildings, assets and educational tools whereas Ministry of Public Health will retain the right to undertake supervision of the all health-related aspects.
12. The private school has no right to receive any financial support, contributions, donations nor grants from any authority or body without obtaining prior written approval from the Ministry of Education and Higher Education.
13. The private school will provide MEHE, a complete list of school fees and all other expenses that will be collected from students at the beginning of academic year for ratification.
14. The private school is committed to developing a school-wide database of all students and staff. Files, books and records to be updated to ensure effective operation of all financial and administration works and informed to MEHE.
15. The private school develop regulations to ensure effective workflow in accordance with MEHE.
16. The private school should have its own budget that entails revenues and expenditure. School revenues should be kept in a single account at one of the local banks. Budget document and closing Account are to be shared with MEHE.



### 8.2.2. Implementation of the Qatari Curriculum Standards

- The Private Schools Office (PSO) is responsible for licensing Arab, International and expatriate Private schools as well as Early Childhood schools and KGs operating in Qatar and monitoring their compliance.
- Schools should communicate with the Curriculum Standards Office of the MEHE and sign an agreement, to acquire the Qatari Curriculum Standards documentation.
- The schools educational plan will be requested and will be reviewed.
- Documents will also be requested to show evidence of the implementation of the curriculum standards and the assessment policy.
- Student academic achievement will be measured by the National Comprehensive Examinations.

### 8.2.3. Implementing an Internationally Accredited Curriculum

- Schools need to provide evidence that demonstrates that they can implement an International Curriculum accredited by the Evaluation Institute of the ministry.
- Should have education plans and assessment policy. This will be requested and will be reviewed by MEHE

Table 29: Licensing Requirements for Schools

A. School Building	<ol style="list-style-type: none"> <li>1. School site, building, facilities and equipment must meet the minimum standard requirements.</li> <li>2. Licensee must indicate the purpose and provide all necessary information and documentation about school site and building when submitting the initial application.</li> </ol>
B. Work System	<ol style="list-style-type: none"> <li>1. School should have detailed organizational plan to ensure effective school operation.</li> <li>2. Any person employed should meet the following criteria: <ul style="list-style-type: none"> <li>• Must be over 18 years of age with required qualification for that post</li> <li>• Must have good conduct and reputation</li> <li>• Do not have any criminal record</li> <li>• Must not have been dismissed from office due to a judicial verdict or a final disciplinary decision if decision or verdict was made within a minimum of one year</li> <li>• Must be physically fit</li> </ul> </li> <li>3. School principal <ul style="list-style-type: none"> <li>• Must have minimum 10 years of experience in school administration and a proven track record in the field of education.</li> <li>• Must hold an accredited university degree in education.</li> <li>• Must pass the interview.</li> </ul> </li> <li>4. Teaching staff <ul style="list-style-type: none"> <li>• Teachers must be qualified and experienced to teach the curriculum and age range.</li> <li>• It is mandatory that the teaching staff of the three compulsory subjects in private schools are specialists and are qualified to teach in all stage and levels from Grades 1 to 12 or equivalent in both Arabic Language and Islamic Education and in grades 1 – 9 in Qatari History.</li> </ul> </li> <li>5. The Business Plan should cover a period of three years. Year one should have detailed outline projection for years two and three. The plan should provide the projected growth of student numbers and school capacity to ensure continuity of students in the same private school as per the approved template.</li> <li>6. The private school should provide detailed information about its applicable internal systems and policies such as student registration &amp; admission policy (system), and student behaviour policy (system) to be reviewed by MEHE</li> <li>7. The Private school should provide a statement that demonstrates parental engagement in the whole school educational process.</li> </ol>
C. Education System	<ol style="list-style-type: none"> <li>1. Applicant should provide a comprehensive educational plan.</li> <li>2. Private school must comply with admission policies and decisions made by MEHE and thereby develops student admission policy and age range.</li> <li>3. Curriculum and the education plan must be approved by MEHE. Any modifications or changes to its curriculum and education plan needs prior written approval from MEHE.</li> <li>4. All private schools are required to teach the three compulsory subjects (namely Islamic Education, Arabic and Qatari history), either in discrete lessons or as part of an integrated program.</li> <li>5. All private school's textbooks and all learning resources based on which the education process is drawn, must be consistent with values, ethos and Qatari national traditions.</li> <li>6. All private schools are required to take part in international student assessments, as requested by MEHE.</li> </ol>



Table 30. Licensing Process for Schools

Licensing Process for Schools			
Actions		Responsible Persons / Office	Process Completion Period (Working Days)
1	<ul style="list-style-type: none"> <li>Initial applications should be submitted electronically on the standard application form (appendix one)</li> <li>Applications will be logged, and the applicant will receive notification of the name of member of the Private Schools Office (PSO) who will be act as licensing case manager (point of contact).</li> </ul>	<p>The applicant</p> <p>Private School Office (PSO)</p>	Three day
2	<ul style="list-style-type: none"> <li>Initial screening of the application will take place to ensure that all compulsory elements have been included. Reference will be made to the Essential Information Checklist, a part of the application form.</li> <li>If the application is not complete in any way, it will be returned to the applicant with an explanation of the problem. The applicant will have the opportunity to re-submit within three days.</li> <li>If the application meets initial screening requirements, sections will be sent to relevant departments for review and the applicant will be provided with an official letter from the PSO, allowing them to acquire a letter of clearance from the Ministry of the Interior.</li> <li>As soon as the applicant has acquired the letter of clearance, they should present the original to the case manager</li> </ul>	PSO case manager	Three day
3	<ul style="list-style-type: none"> <li>The application will be reviewed about Applicant Information, School Information, The School Organization Plan, The Education Plan, The Business Plan, The Premises Plan, Proposed Timetable for Opening</li> <li>The PSO, CSO and FO will provide a written and signed report (fully meets criteria / meets most criteria / fails to meet criteria). In cases where a section does not fully meet criteria, the report should indicate the reasons, which will be relayed to the case manager, who will then convey this information to the applicant.</li> <li>The GSD will conduct an inspection of the proposed site and building(s) and advise both the applicant and the case officer as to whether the specific and general criteria are met. Where the criteria are not fully met, the GSD will inform the applicant in writing and request necessary modifications. Once all requirements have been met, the GSD will inform the case manager.</li> </ul>	<p>PSO</p> <p>Curriculum Standards Office (CSO)</p> <p>Finance Office (FO)</p> <p>General Services Department (GSD)</p>	Five day

## Licensing Process for Schools

Actions	Responsible Persons / Office	Process Completion Period (Working Days)
<p>4</p> <ul style="list-style-type: none"> <li>The PSO case manager will review the feedback and contact applicants, as appropriate:</li> <li>Applicants whose application fails to meet criteria will be informed that their application has been rejected and that they will not be allowed to resubmit until the next scheduled submission date.</li> <li>Applicants whose application meets most criteria will be informed of any weaknesses and invited to attend a meeting to discuss the application. The PSO case manager will arrange the meeting. Relevant Offices will be invited to attend the meeting and provide verbal feedback to the applicant.</li> <li>The applicant will be asked to resubmit the amended application to the PSO Case manager.</li> <li>The PSO case manager will forward sections of the revised application to responsible Offices for final review.</li> <li>Responsible offices will provide the case manager with their final verdict</li> </ul>	PSO case manager	Five Days
<p>5</p> <ul style="list-style-type: none"> <li>Applicants whose applications fully meet criteria (either initially or after revision) will be informed that their application meets requirements. The PSO will provide formal letters of introduction from the PSO, which allow applicants to visit other Ministries in order to acquire the following: <ul style="list-style-type: none"> <li>Civil Defence Clearance</li> <li>Traffic Office Clearance</li> <li>Municipality license</li> <li>Commercial license</li> </ul> </li> <li>It is incumbent on the applicant to acquire these documents as quickly as possible</li> </ul>	PSO case manager Ministry of interior (MOI) Ministry of Economy and Commerce (MEC)	Three days
<p>6</p> <ul style="list-style-type: none"> <li>Once the applicant has acquired all four documents, they will present these to the PSO case manager. The case manager will then approve the application and forward it to the Private Schools Committee (PSC) for ratification</li> <li>The applicant will be required at this point to provide a Bank Bond.</li> </ul>	PSO case manager PSC Applicant	Three days



### Licensing Process for Schools

Actions		Responsible Persons / Office	Process Completion Period (Working Days)
7	<ul style="list-style-type: none"> <li>The PSC will review the application and the recommendations of the case manager and either ratify the approval or call for additional information.</li> </ul>	PSC	Within ten days
8	<ul style="list-style-type: none"> <li>The PSC will officially inform successful applicants that their license has been awarded.</li> </ul>	PSC	Three days
9	<ul style="list-style-type: none"> <li>The case manager will set up a meeting with the applicant to agree the schedule for opening</li> </ul>	PSO case manager	Five days
10	<ul style="list-style-type: none"> <li>The applicant will submit a full CV and clearance note for the proposed principal and the case manager will set up an interview with the owner and proposed principal to ensure suitability for the post.</li> </ul>	Applicant and PSO case manager	Two months before opening the school
11	<ul style="list-style-type: none"> <li>The case manager will arrange for the school to be visited by appropriate SEC staff, as appropriate, prior to opening.</li> </ul>	PSO case manager	One month prior to opening
12	<ul style="list-style-type: none"> <li>PSO staff will monitor the school during the first year of operation</li> </ul>	PSO	During the first year of operation
13	<ul style="list-style-type: none"> <li>Arrangements will be made to inspect the school at the end of the first year of operation.</li> </ul>	Evaluation Institute (EVI)	During 18 months from opening.

Table 31: Licensing Process for a New School

Licensing Process for a New School	
First: The school's Legal Entity	<ol style="list-style-type: none"> <li>1. Commercial Register, indicating the company's name, address, type, date of its incorporation, the amount of its capital and the names of partners.</li> <li>2. Copy of the property ownership document, if the property is owned by the proprietor of the school, or a copy of the lease if it is rented.</li> <li>3. A certificate of good conduct from the concerned authorities in the country of the proprietor of the school.</li> <li>4. If the proprietor is more than one person, a copy of the company's contract must be provided, in addition to certificate of good conduct from the concerned authorities of each partner's country.</li> <li>5. The CVs of the proprietor and the members of the shareholders</li> <li>6. A copy of the passport or identity card of the proprietor of the school and individual shareholders.</li> <li>7. Copy of the proprietor's and the individual shareholders' signature.</li> <li>8. If the proposed school is an expatriate school, a letter from the embassy of the country should be provided.</li> </ol>
Second: introducing the proposed school	<ol style="list-style-type: none"> <li>1. Documents indicate the financial capacity of the applicant (Bank Guarantee)</li> <li>2. A document outlining the organizational structure and management of the school.</li> <li>3. Data and Information System and indicators or a list of records and documents and reports</li> </ol>
Third: Organizational Structure	<ol style="list-style-type: none"> <li>1. The principal's CV.</li> <li>2. A Certificate of good conduct for the principal issued by the concerned authority.</li> <li>3. A copy of the passport and ID card of the principal.</li> </ol>
Fourth: Educational Plan and the Curriculum	<ol style="list-style-type: none"> <li>1. Provide evidence for implementing the Qatari curriculum standards or approved international curriculum that is documented and approved by the official concerned authorities.</li> <li>2. A document outlining the vision, mission and objectives of the school.</li> <li>3. The Educational Plan describing the stage of school, the curriculum, the language of instruction and the plan for teaching Arabic, Islamic Studies and Qatari history.</li> <li>4. Students assessment system</li> <li>5. The behaviour and guidance system</li> <li>6. The development of values and national identity</li> </ol>
Fifth: The school building	<ol style="list-style-type: none"> <li>1. The school's engineering drawing showing the street and the area that the school located in, the dimensions and areas of the classrooms and outdoor spaces in addition to the all school facilities.</li> <li>2. Documents outlining the specifications of the building.</li> </ol>



Table 32: General Conditions and Requirements to be Met by Applicants

General Conditions and Requirements to be Met by Applicants
When applying for private school license with MEHE, the applicants are required to follow certain guidelines:
<ol style="list-style-type: none"><li>1. Applicant must demonstrate their financial capacity for managing and operating the school.</li><li>2. Applicants should demonstrate that they have conducted a thorough review of the market needs for provision of these services.</li><li>3. Applicants should provide all necessary plans and documents; any missing documents will result in delay of processing the applications. Certain documents need to be submitted in hard copy only such as school premises plan, certificate of good conduct and traffic clearance Certificate.</li><li>4. Applicants can provide any additional information related to school mission and organizational plan when they submit their applications.</li><li>5. The documents and information provided by the applicant, based on which the private school license has been awarded by MEHE, are deemed to be an integral part of the whole licensing process.</li><li>6. Applicant is held responsible for accuracy of information, data and documents provided. In situations where errors occur, the applicant will be held accountable and this may lead to cancellation of the license.</li><li>7. There is no fixed pupil-teacher ratio for the schools, yet there is an upper limit in compliance to the national levels. For licensing the applicant must give a proposed ratio in advance for the next 5 years</li><li>8. The intellectual property rights of the curricula and textbooks provided by the Ministry of Education and Higher Education will be the exclusive intellectual property rights of MEHE. The private schools are not allowed to sell nor copy the intellectual rights for any purpose without the written consent.</li><li>9. The MEHE requires that the school premises should meet the minimum standards in terms of area and capacity as mentioned in Table 20</li></ol>



Table 33: The size and capacity of the premises and building:

The size and capacity of the premises and building				
Requirement	Education phase			
	Kindergarten	Primary	Preparatory	Secondary
Minimum land area	1,250 sqm	2,750 sqm	3,500 sqm	3,500 sqm
Minimum classroom space per student	2 sqm	2 sqm	2 sqm	2 sqm
Minimum outdoor space per student	5 sqm	7 sqm	10 sqm	10 sqm

Sqm- square meters

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## About Qatar Development Bank

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.

### For more information

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