

INVESTMENT IN SHARJAH

A REPORT ON PRIVATE EDUCATION

FIRST EDITION
2022- 2023

هيئة الشارقة للتعليم الخاص
SHARJAH PRIVATE EDUCATION AUTHORITY



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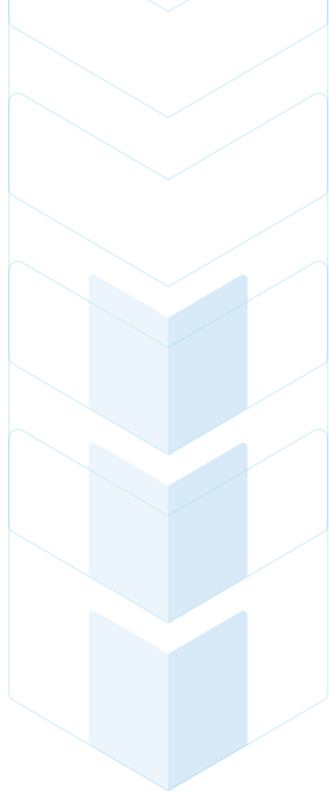
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Executive Summary

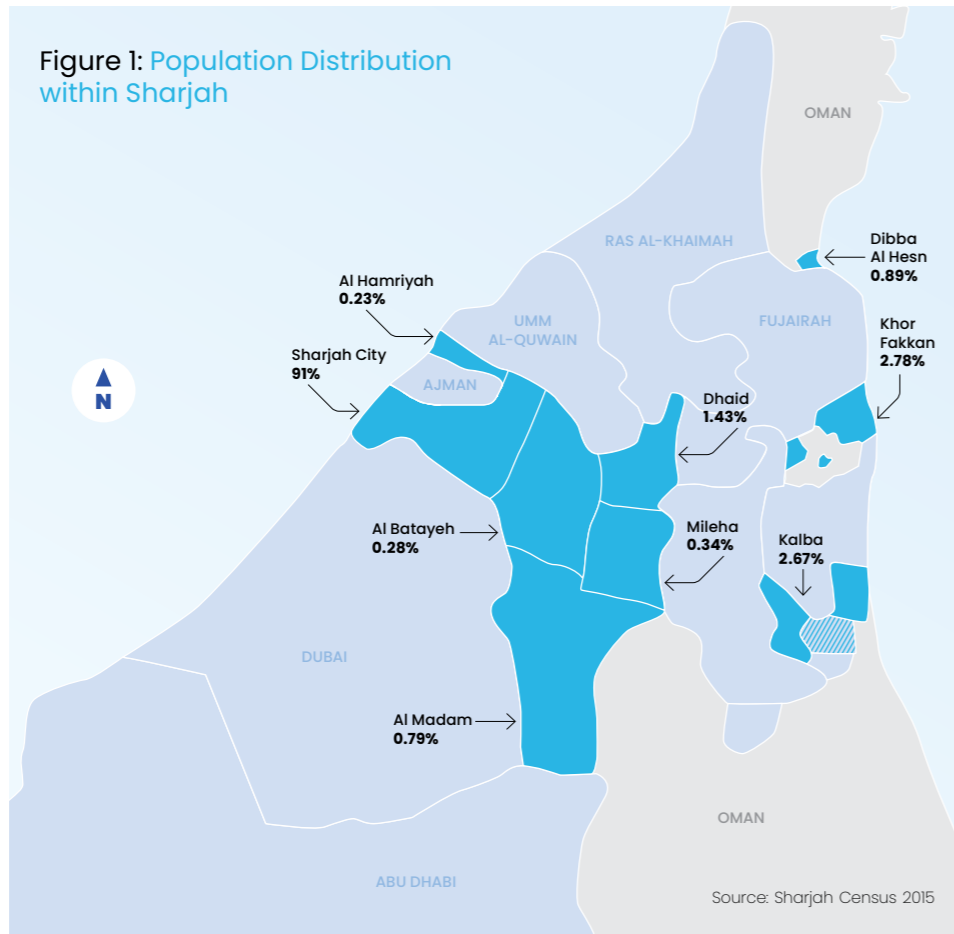


Background on Sharjah

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Sharjah is the 3rd largest emirate in the UAE by size, with its population comprising 22.4% of the UAE's population. The population comprises of 88% expats, originating from South Asian and Arab countries as well as Western countries. Sharjah has succeeded in attracting a large talent pool due to its relatively lower cost of living in addition to its government's various policies aiming to attract and retain talent within the Emirate. The map below shows the distribution of Sharjah's population across the major municipalities.





Over the last decade, Sharjah witnessed a steady growth in the number of private schools, from 94 schools in 2013/2014 to 127 schools in 2022/2023.[1] The number of private schools in the UAE has increased at a higher rate than public schools. As the following figure illustrates, the percentage of public schools has decreased from 92% in 2009/2010 to 49% in 2018/2019.

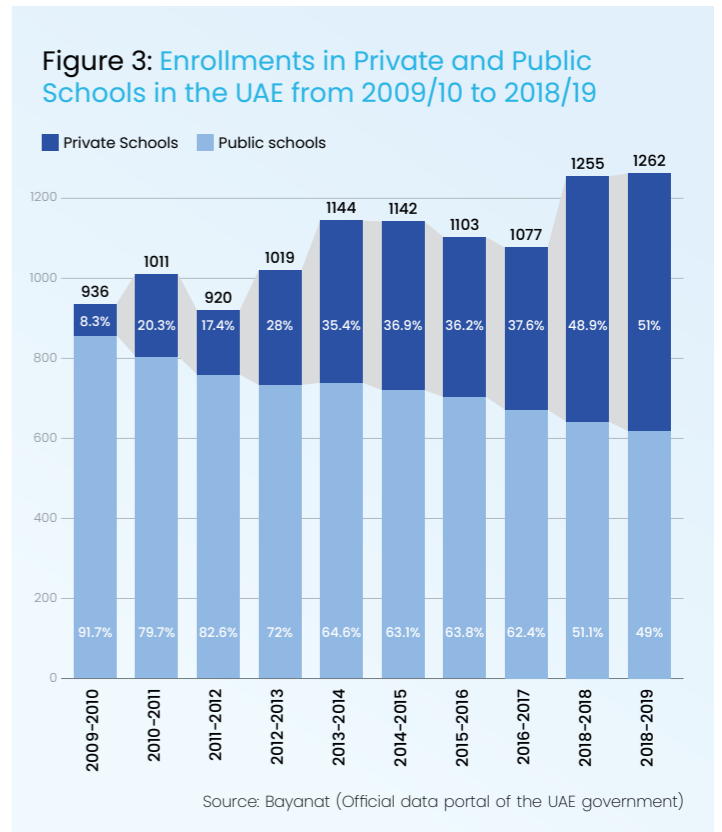
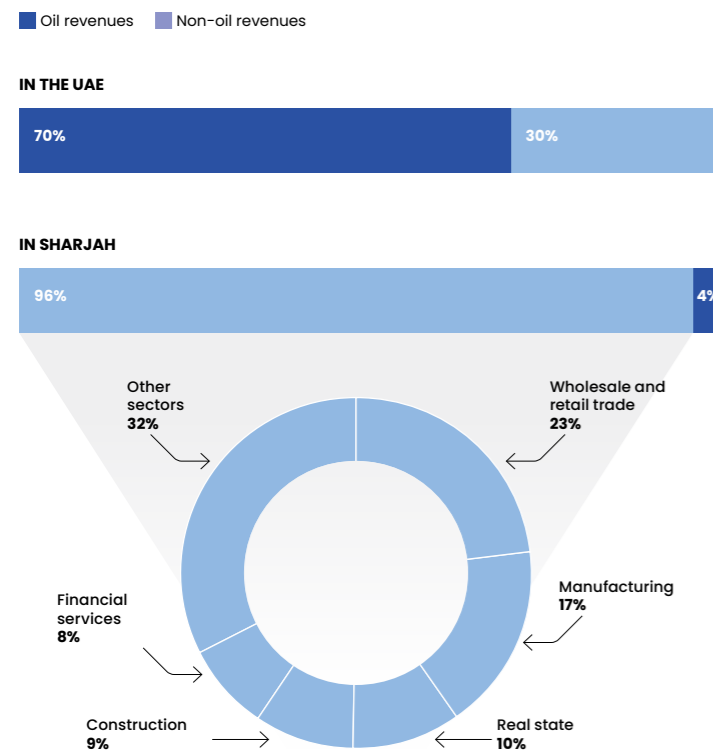


Figure 2: Sectors Contribution to GDP - UAE and Sharjah



Sharjah's GDP witnessed a steady growth in the last decade from AED Dh78.8 billion in 2010 to Dh124.5 billion in 2020, and reaching Dh130.5 billion in 2021 (an increase of 4.8% from 2020). [1] Sharjah has the most diversified economy in the UAE, with the least reliance on oil revenues. It is considered the industrial hub of the UAE, hosting 35% of the country's manufacturing facilities. Sharjah has effective policies focused on private sector development and entrepreneurship, increasing the contribution of industries such as retail, real estate and construction to Sharjah's GDP.

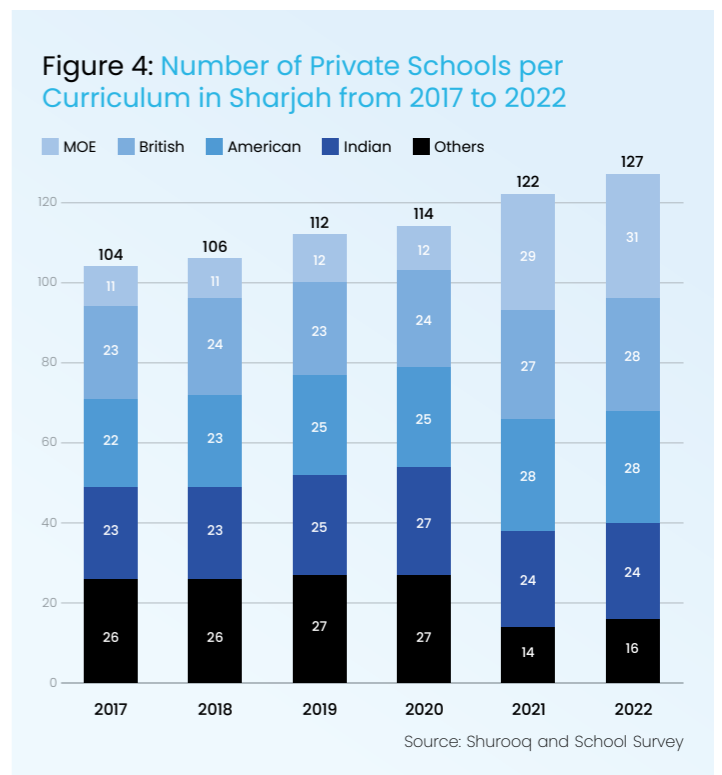
Source: Oxford Business Group, The Report Sharjah 2021

“The number of private schools in the UAE has increased at a higher rate than public schools.”

Private schools follow 10 different curricula. In Sharjah private schools, the preferred curricula are British/IB, American, Indian and Ministry of Education curricula. Between 2017 and 2022, the number of American and British/IB curriculum schools increased at a CAGR of 4.5%.

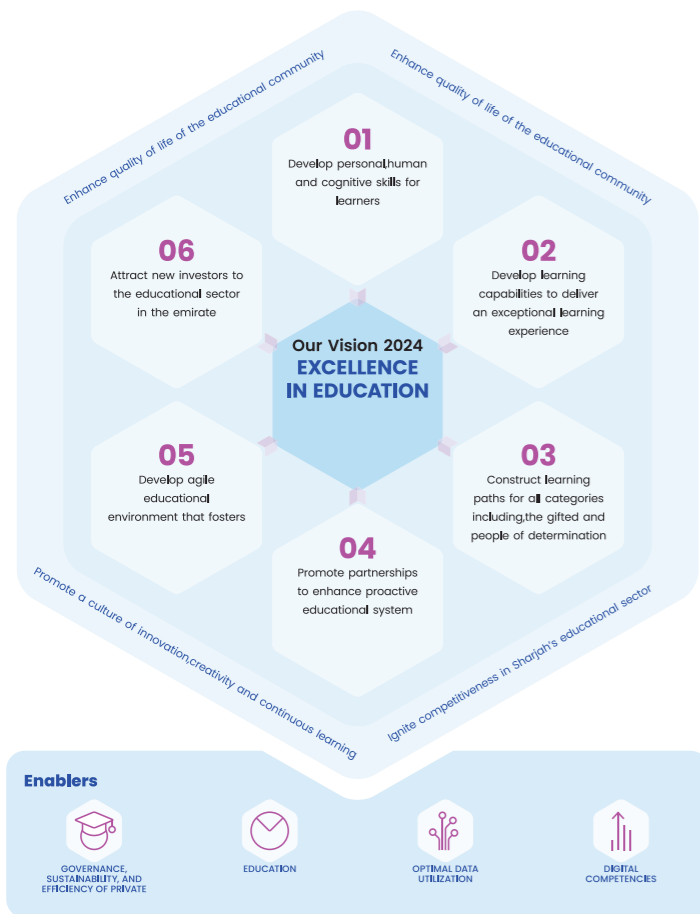
Sharjah Private Education Authority (SPEA) mandate includes regulating private education in the Emirate of Sharjah through undertaking all licensing tasks, raising the quality of private education through providing services using best educational practices, and attracting investment in the private education sector.

The Sharjah Private Education Authority (SPEA) was established under an initiative of His Highness. The authority oversees the continuous development of private schools in the emirate and ensures the highest standards in education are maintained. SPEA provides a technical



advisory and organizes institutional and professional licenses, communication services and technical accreditation. An example of this is the provision of the ITQAN platform, to keep in touch with continuous improvement experts and the ZAJIL platform for communication between SPEA and schools.

By beginning of 2022, SPEA launched its second cycle of the strategy 2022-2024 which covers priorities and a core focus for its future initiatives, which include enhancing the quality of life of the educational community; promoting confidence in the quality of education; fostering a culture of innovation, creativity, and continuous learning, as well as encouraging Sharjah's competitiveness in the education sector. It also adopts a set of objectives, including the development of learners' personal life and cognitive skills, strengthening educational capabilities for an extraordinary learning experience, developing personal, human and cognitive skills for learners; developing learning capabilities to deliver an exceptional learning experience, and constructing learning paths for all categories such as the gifted and people of determination. Additionally, it promotes partnerships to enhance a proactive educational system,



develops an agile educational environment that fosters future needs, and attracts new investors to the emirate's education sector.

Thanks to the support of His Highness, Sharjah has been adopted as a benchmark emirate for international tests, after the Sharjah Private Education Authority (SPEA) announced that its schools had passed the TIMSS tests which evaluate educational achievement in Maths and Science. SPEA aims to provide a database for the development and improvement of schools to assess the educational situation in the targeted subjects compared to the participating countries.

SPEA's has launched various initiatives related to creating effective remote learning during the pandemic with the aim of decreasing disruption for learners.

Initiatives by SPEA include the "We are all partners" initiative aimed at increasing school safety, which led to a significant decrease in safety related complaints and the complete disappearance of school accidents. The "Your children are safe" with total budget of 19 million dirhams, which allows parents to track their children on the school bus through an app allows that also allows for them to communicate directly with the transport supervisor.

The "My Beautiful School" initiative with total budget of 50 million dirhams, is aligned with His Highness's initiatives that aim at providing a better educational environment for students through upgrading the buildings, facilities and services, and strengthening the infrastructure of schools.

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Source: SPEA Website

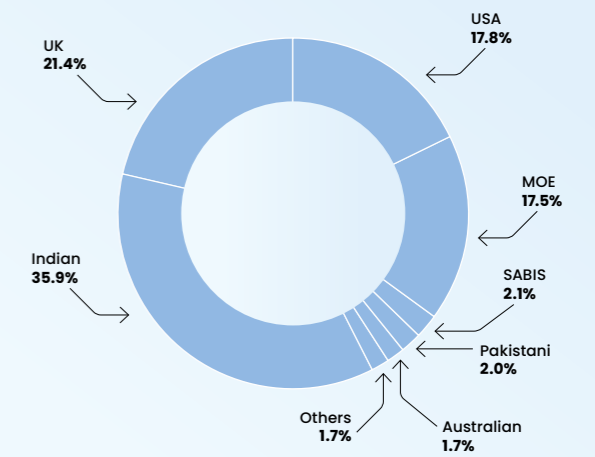
THE CURRENT EDUCATION LANDSCAPE AND OFFERINGS

There are 127 schools in operation for the year 2022/23 with 185,000 enrollments. For the school year 2021/2022, covered by the SPEA School Survey, there were 175,802 students enrolled in 122 private schools operating in Sharjah, with the majority of students (87%) being expats. Special Educational Needs and Disabilities (SEND) students constitute 1.6% of the total number of students enrolled in Sharjah Private schools, with more than a third of them being of Emirati origin.

In terms of curricula, more than a third of total enrollments are in Indian curriculum schools. British curriculum schools are the second most popular with 21% of total enrollments. This is followed by Ministry of Education (MOE) and American curriculum schools with 18% respectively. Enrollment in private schools is centralized to a large degree in Sharjah city (97%), with more than a quarter of enrollments in Sharjah city being in Muwaillih.

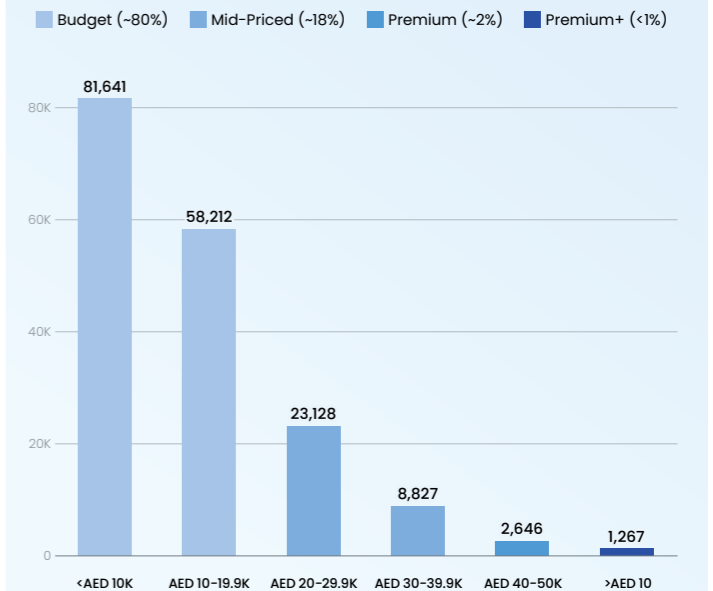
In terms of tuition, close to half of enrollments (46%) are in schools with tuition less than AED 10,000, with another third in schools with tuition from AED 10,000 to AED 19,900. Enrollment in schools with tuition ranging from AED 20,000 to 29,900 came in third with 13% of total enrollments. Only 8% of student enrollments were in schools with a tuition of AED 30,000 or above.

Figure 5: Student Enrollment by Curriculum 2021/2022



Source: School Survey

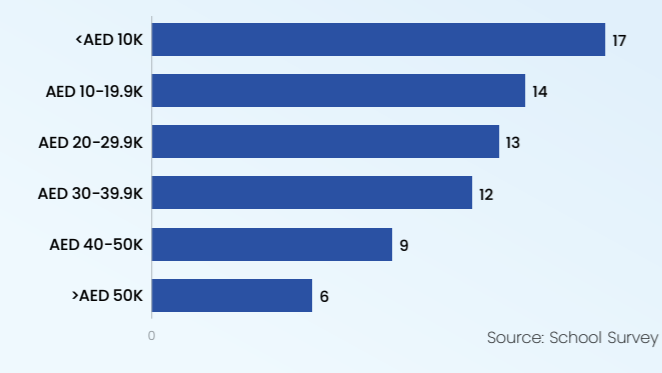
Figure 6: Enrollment by Tuition 2021/2022



Source: School Survey

"Enrollment in schools with tuition ranging from AED 20,000 to 29,900 came in third with 13% of total enrollments."

Figure 7: STR by Tuition 2021/2022



The student-to-teacher ratio across Sharjah private schools is less than 18:1, which is linked to greater academic achievement. In 2021/2022, 11,902 teachers were employed by 122 private schools in Sharjah, with 98% of them being expats. Student-teacher ratios range from 17:1 in budget-priced schools with tuition less than AED 10,000 to 6:1 in premium-priced schools with tuition above AED 50,000. The student-teacher ratio is highest in Indian curriculum schools, followed closely by MOE curriculum schools.

The administration and teaching staff, as well as the extra- and co-curricular activities, are considered highly important by the parents of children enrolled in private schools in Sharjah when selecting schools for their children. In the context of the report, a parent survey was conducted, and parents were asked to rate 38 school selection criteria under six categories using a six-point scale from extremely important to not important at all. The following graph illustrates the percent of parents who rated the elements of the six categories on average as extremely important and very important.

Figure 8: STR by Curriculum 2021/2022

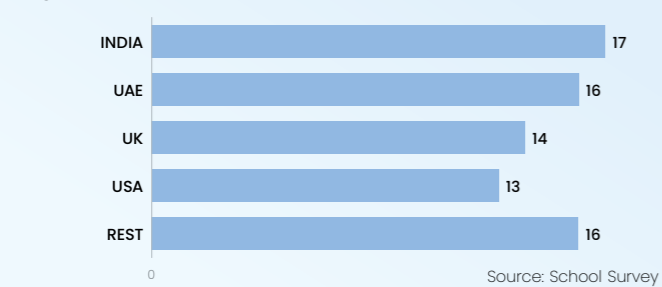
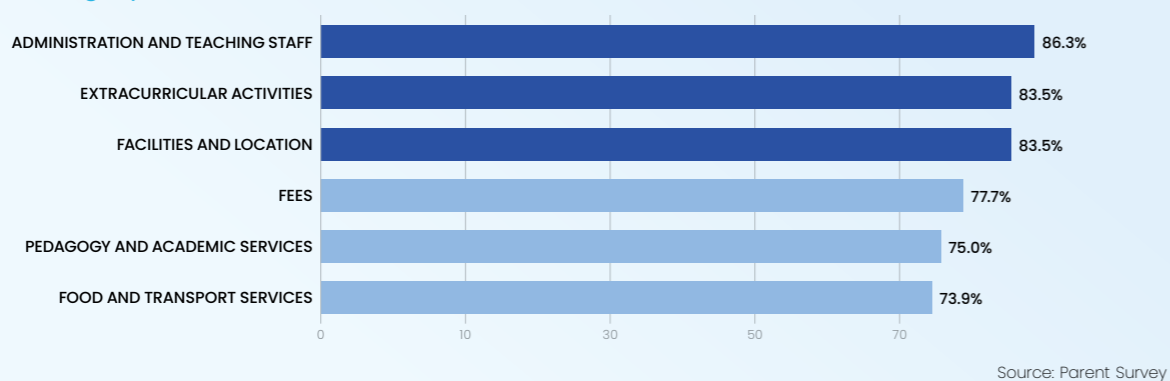


Figure 9: Selection Criteria Importance by Category



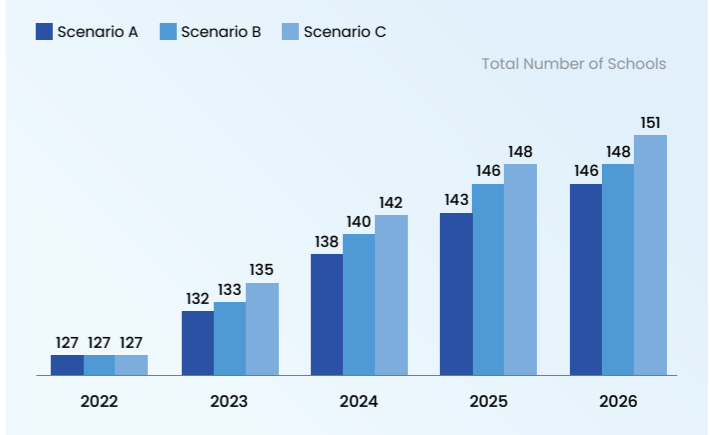
DEMAND FORECAST AND KEY GROWTH DRIVERS

Overall, there are around 32 thousand free seats in private schools in Sharjah, which translates into a capacity utilization rate of 84%. The capacity utilization rate, which represents the percentage of filled seats in schools, is calculated by dividing enrollments over maximum capacity to provide an indication of the level of capacity utilization in schools. The current capacity utilization level, which is within the optimal utilization levels of 80-90% for k-12 education, enables schools to meet additional demand in the short term and maintain flexibility needed for rearranging students schedules. Even though Indian schools have a high utilization rate, they have close to a third (30%) of the free seats. A quarter of the free seats are in American schools, followed by British and MOE Curriculum schools (17% and 15%, respectively).

While budget-priced schools have a high utilization rate, they have the largest number of free seats (67% of free seats). The mid-priced schools in the AED 30-39k tuition range have a limited free capacity as opposed to those in the AED 20-29.9k tuition range. While premium-priced schools have a lower utilization rate, they have the lowest number of free seats (9% of free seats).

The key growth drivers for K-12 private educational institutions' growth are the population growth with its large expat student base, government support for quality education, and parents' high spending on education in the UAE. The UAE's school-going population is estimated to grow from 1.3 million in 2021 to reach 1.5 million in 2028, according to the UN population forecast. Sharjah's existing large expatriate population, estimated at 88%, underlies the preference for international curricula. SPEA's 2022-2024 strategy of promoting a higher quality of education is strengthening Sharjah schools' ability to attract more students. Parents in the UAE were the second highest spenders on a child's education globally, with an average total spend of \$99,378 for one child from primary school to undergraduate level, according to HSBC's annual report, Value of Education 2017.

Figure 10: School Demand Forecast 2022-2026



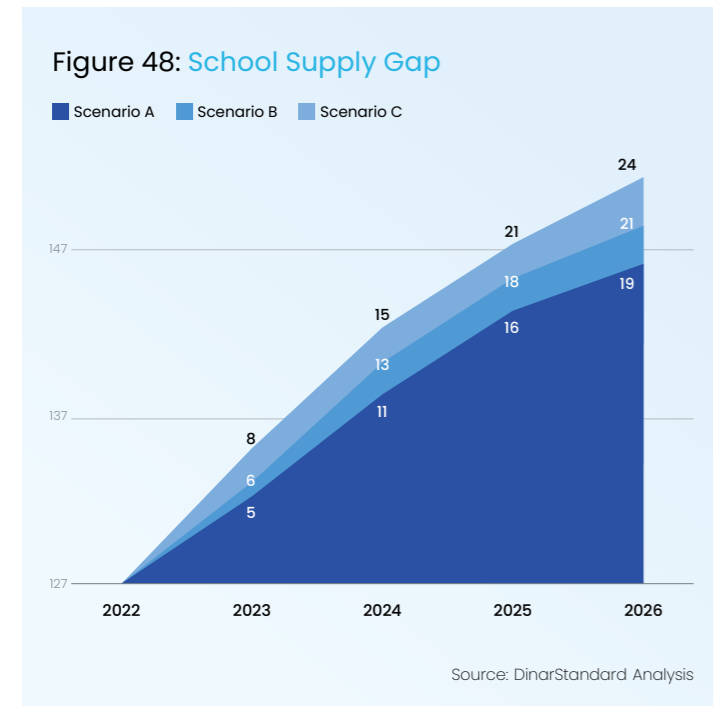
ADDITIONAL STUDENTS			
	A	B	C
2022 F	10,753	11,614	12,474
2023 F	11,792	12,735	13,678
2024 F	9,460	10,217	10,974
2025 F	7,054	7,618	8,183
2026 F	4,438	4,793	5,148
Total	43,497	46,977	50,457

STUDENTS ABOVE CAPACITY			
	A	B	C
2022 F			
2023 F	7,847	9,651	11,454
2024 F	9,460	10,217	10,974
2025 F	7,054	7,618	8,183
2026 F	4,438	4,793	5,148
Total	28,799	32,279	35,759

ADDITIONAL SCHOOLS NEEDED			
	A	B	C
2022 F			
2023 F	5	6	8
2024 F	6	7	7
2025 F	5	5	6
2026 F	3	3	3
Total	19	21	24

Source: DS Analysis

“Demand for schools is expected to increase from 127 schools in 2022 to reach 146 schools in the baseline scenario (scenario A) by 2026, as opposed to reaching 148 schools in scenario B and 151 schools in scenario C.”



Three scenarios were developed for school demand based on the United Nations population forecast for the UAE and the student uptake factor for Sharjah, which calculates the number of Sharjah school students as a proportion of the total number of children of the appropriate age living in the UAE. All scenarios are based on the UN population medium scenario, which projects future levels of fertility, mortality, and migration using probabilistic methods while taking into account the UAE’s past experience. The three scenarios assume different uptake factors for Sharjah based on historical data, with scenario A being the baseline scenario and scenarios B and C having higher uptake factors contingent on an improved quality of education in Sharjah attracting more student enrollments.

As the forecast graph shows, demand for schools is expected to increase from 127 schools in 2022 to reach 146 schools in the baseline scenario (scenario A) by 2026, as opposed to reaching 148 schools in scenario B and 151 schools in scenario C. The estimates are based on an average school capacity of 1,500 students at a 90% capacity utilization level, which is calculated by dividing enrollments over maximum capacity, based on data from the school survey.

Table 12: School Age-Going Population vs. Enrollments

	% OF SCHOOL AGE-GOING POPULATION	% OF ENROLLMENTS 2021/2022	NUMBER OF SCHOOLS 2021/2022
Sharjah City	87.7%	95.6%	110
Kalba	4.4%	1.4%	3
Khor Fakkan	4.1%	1.2%	4
Al Daid	1.7%	1.4%	3
Al Madam	1.0%	0.2%	1
Milehah	0.4%	0.2%	1
Al Batayeh	0.3%		
Al Hamriya	0.3%		

Source: Census 2015 and School Survey

Based on the current supply of 127 schools in the school year 2022/2023 and the estimated demand for schools according to the three scenarios, the demand for schools will exceed supply starting immediately in the school year 2023/2024.

In terms of school locations, there are notable gaps with an absence of private schools in two municipalities, namely Al Batayeh and Al Hamriya. Additionally, comparing the size of the school-going population to enrollments presented in the following graphs, both Kalba and Khor Fakkan, which are enclaves of Sharjah, have notably fewer enrollments in comparison to the size of their school age-going populations. Additionally, there are a number of new residential projects in the pipeline in Al Rahmaniya and Suyoh, which are likely to attract thousands of families. With available land plots earmarked for schools in both municipalities, they represent high-potential investment opportunities.

In terms of curriculum, three of the four curricula with the largest number of schools, namely the MOE, British and Indian, are all above an 85% capacity utilization rate. This high rate of capacity utilization coupled with the anticipated demand for schools starting in 2023 indicates a need for schools to provide these curricula as early as 2023. However, it should be noted that two new MOE schools were opened in 2022.

In terms of tuition, the capacity utilization rate for the under AED 10k category is quite high (89%), followed by the AED 30-39.9k category (85%), and the AED 10-19.9k category (84%). However, with the limited supply of schools in the AED 30-39.9k category, the supply gap for quality schools in this tuition bracket seems pressing.

Table 13: School Capacity Utilization Rate by Curriculum

CURRICULUM	NUMBER OF SCHOOLS 2022/2023	AVERAGE UTILIZATION RATE 2022/2023
British	28	88%
MOE	31	87%
Indian	24	87%
American	28	79%

Source: School Survey

Table 14: School Capacity Utilization Rate by Tuition

TUITION	NUMBER OF SCHOOLS 2022/2023	AVERAGE UTILIZATION RATE 2022/2023
<AED 10k	51	89%
AED 10-19.9k	39	84%
AED 20-29.9k	21	78%
AED 30-39.9k	5	85%
AED 40-49.9k	4	64%
>AED 50k	2	49%

Source: School Survey



With the limited supply of schools in the AED 30-39.9k category, the supply gap for quality schools in this tuition bracket seems pressing

THE FUTURE OF PRIVATE EDUCATION IN SHARJAH

The school operating system needs to transform, considering that the system that drives schools has not been rebooted in over 150 years. The system's major components, including curriculum, pedagogy, student assessment, teacher hiring and evaluation, the use of time and space, and professional development, all need to be redesigned. The successful models of innovative and cutting-edge education are continuously improving upon these components in order to develop methods to engage and enable students in a rapidly changing world.

Student assessment and certification need to be redesigned with an eye to both shifting away from traditional institutional models and cultivating new ones that foster trust, verification and acceptance of the outcomes granted by those new systems.^[1] To create global educational ecologies, the authority, immutability and organization of educational records in a flexible and distributed way is essential. There is a shift

towards the use of portfolios, where students collect their work, select what work meets standards, reflect on that work and then share it with an audience. Schools are also using exhibitions of mastery instead of final exams to see how well students understand material and respond to hard questions before mixed audiences of peers, teachers, and the community. The result is a systematic change in the learning culture through shifting expectations, levels of work and student interest and engagement.

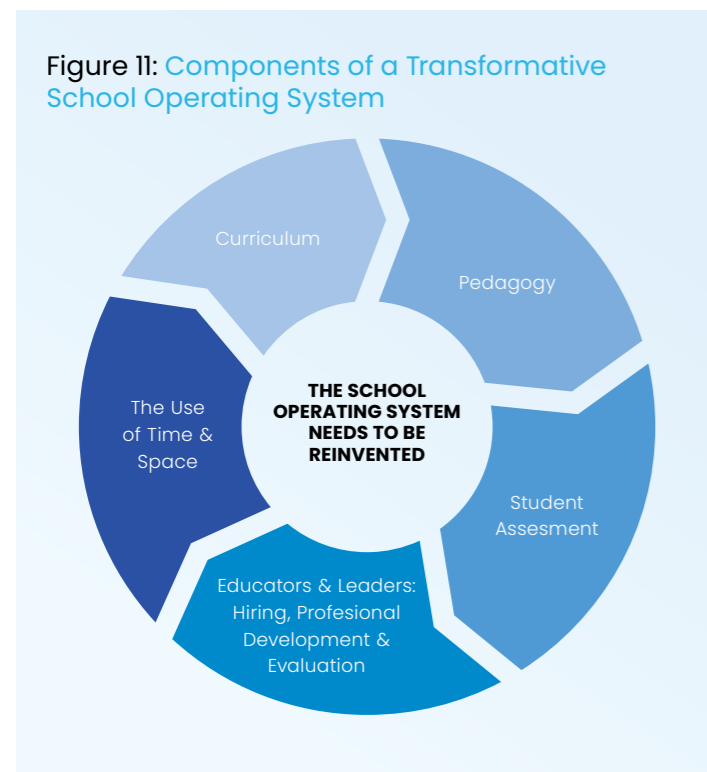
Fundamental changes in pedagogy and curriculum are necessary in order to build the schools of tomorrow. Innovative, cutting-edge schools are trading traditional teaching models for play and maker education, user-centered design, blended learning, data-centric learning platforms, inquiry-based learning and project-based learning. By employing these new and innovative techniques, teachers can hand ownership of learning over to students and focus on the whole child. In innovative classrooms, students are propelled by intrinsic motivation and genuine engagement rather than by didactic interventions choreographed by a teacher.

The future of learning is based on the fact that most of the jobs of the future don't even have degree pathway maps yet. We need to have students that are agile enough to be able to take a series of competencies and apply them more contextually to a future job. Also, emotional intelligence skills are going to be huge for thriving in the future workforce, which is transient. According to the P21 model from the USA, it proposes that one should have some basic knowledge to have some foundation to stand. Then additional skills are built on top, such as innovation, creativity, critical thinking, problem-solving, communication, collaboration, information media, technology, leadership, life and career skills.

Technology has gone from tools that substitute traditional educational practices to tools that can redefine education itself.^[1] Gamification and Game-Based Learning are playing an increasing role in school curricula as teachers seek to deliver core lessons – such as Social Studies, reading and STEM – in a format that engages students and increases their mastery of discipline area content. Virtual schools are offering more than online curricula; they offer real teachers and real students at the other end. In some cases, students even go to a classroom, either in a separate building from their school or in a dedicated room within that school, to complete work, and at times with a school-based mentor teacher.

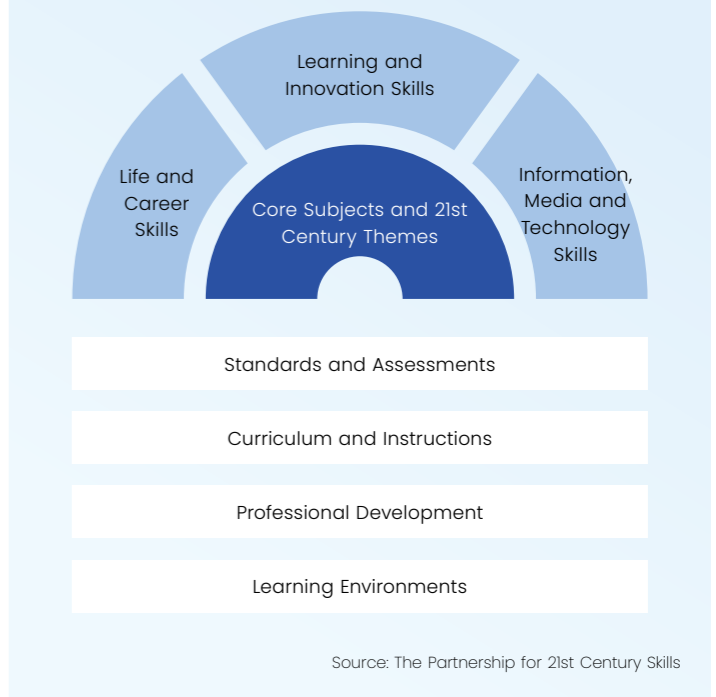
The UAE and Sharjah are highly innovative and forward thinking, using foresight and design to their limits to reimagine and relaunch almost all sectors. The UAE has great experiments and innovations in education that should be looked to and watched for long-term success in shifting paradigms and bypassing legacy education systems. In 2022, the UAE Ministry of Education announced the implementation of the "Alef Platform" in all UAE public schools to develop a digital education system capable of adapting to all possible changes caused by the Covid-19 pandemic and turning the challenges faced in distance learning into promising opportunities.

"Gamification and Game-Based Learning are playing an increasing role in school curricula as teachers seek to deliver core lessons."



"The successful models of innovative and cutting-edge education are continuously improving."

Figure 12: P21 framework for 21st century learning



CONCLUSION AND RECOMMENDATIONS

The private school market in Sharjah has thrived over the past few decades due to the presence of a large expatriate base. The upward trend in the number of private schools is expected to continue, driven by population growth, Sharjah's commitment to quality education, and a high level of spending on education by UAE parents. Based on the estimates put forth in the demand forecast chapter, Sharjah will need 21 to 26 new schools by 2028 to accommodate additional students, with new schools needed starting in 2023.

Sharjah is well-positioned to harness the new educational trends. SPEA, in particular, can help equip their key stakeholders with the required mindset and skills needed to adapt to the future of education. Following the insights provided in the previous chapters on the school supply gaps as well as the insights on the future of education,

SPEA, in particular, can help equip their key stakeholders with the required mindset and skills needed to adapt to the future of education



below are some recommendations for investors, the education sector in general, and SPEA in particular to equip their key stakeholders with the required mindset and skills.

With notable supply gaps that can be addressed by investors, there are varied opportunities for investment in the private school market. Below are some investment opportunities for investors seeking to enter the private school market in Sharjah.

1. Build schools in areas with limited private school supply and/or new residential developments.

- Address the absence of private schools in Al Batayeh and Al Hamriya.
- Address the lower number of schools in Kalba and Khor Fakkan in comparison to other municipalities.
- Invest in areas where a number of new residential projects are in the pipeline in Al Rahmaniya and Suyoh, with available land plots earmarked for schools.

2. Focus initially on building schools for curricula with high-capacity utilization levels.

- Address initially the expected shortage of free seats for the British curriculum schools, which are at an 88% average capacity utilization rate.
- Address the expected shortage of free seats for other curricula, such as MOE, Indian and American curriculum schools.

3. Invest in the development of premium schools.

- Address the limited supply of premium schools in the AED 30-39.9k category, which are at an 85% average capacity utilization rate.
- Ensure the quality of education provides value for money for parents and students.

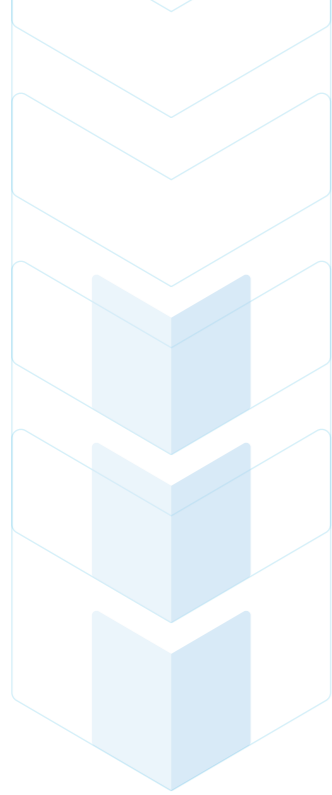
4. Cultivate knowledge of the changing trends in education and the expectations of parents.

- Ensure the new schools are managed with an eye for the changes in educational trends.
- Ensure that parents' and students' expectations are met with regards to school administration and teaching staff, curricular and extra-curricular activities and facilities requirements, which were rated as extremely important or very important by Sharjah parents in the context of the survey.

Innovation toward the education of the future will be defined by the nexus of SPEA research, design, funding and implementation geared toward bypassing traditional systems and creating a truly new system of education for the region.

There are varied opportunities for investment in the private school market.





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