



Monograph: August 2025

Strategic Insights into the Evolving Private Education Landscape of the UAE

Understanding emerging demand, curriculum trends, and expansion potential for premium school operators and investors across the Emirates.

The United Arab Emirates (UAE) is undergoing a significant phase of growth and change, driven by strong GDP growth, rapid urbanization, and a steady increase in expatriate and high-net-worth populations. These shifts are creating a growing demand for high quality private education that meets international standards and caters to diverse communities. While cities like Dubai and Abu Dhabi have seen major investments in premium schooling, other emirates are now emerging as new hotspots for education development. As more families settle across the country, the need for well positioned, globally relevant K-12 schools is becoming increasingly clear.

This monograph by Eduvisors explores how the UAE's education landscape is evolving across Emirates. It highlights emerging opportunities for setting up new private schools in high growth areas.

About Eduvisors:

Eduvisors is a leading sector-focused consulting firm in Education in India.

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Overview of United Arab Emirates (UAE)

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UAE Economic Profile



GDP 2024
537.08 Billion
GDP Per Capita
\$49,377.6
FDI Flow (2023)
\$30.69 B
Population (2025)
~ 11.35 Mn



Non-Sector Oil GDP Contribution ~ 75%



Detailed breakdown of the sector-wise GDP contributions

Trade	Manuf.*	Finance & Insurance	Cons*	T&S	RE	H & FS*	Others*
16.8%	13.5%	13.2%	11.7%	9.6%	7.8%	5.7%	24.7%

*Manf: Manufacturing

*RE: Real Estate

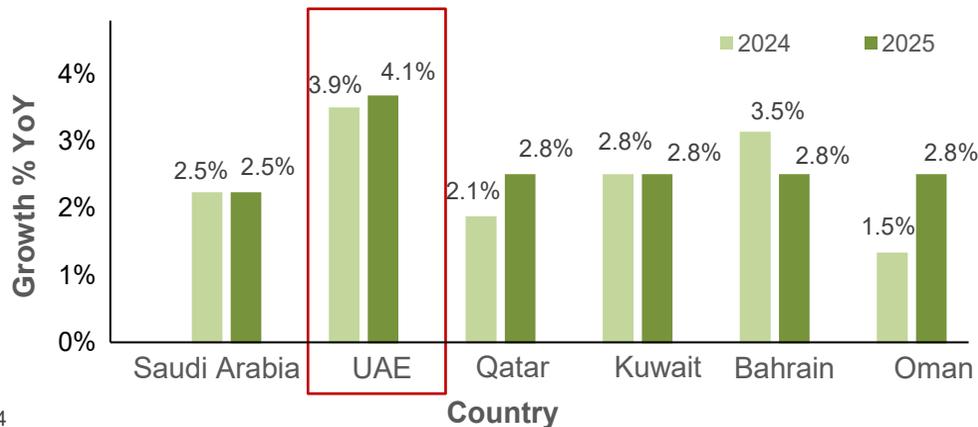
*Cons: Construction

*H & FS: Hospitality and Food Services

*T&S: Transport and Storage

*Others: Agriculture, Mining, Professional & Administrative Services etc.

GCC Economic Growth Trend YoY (%)



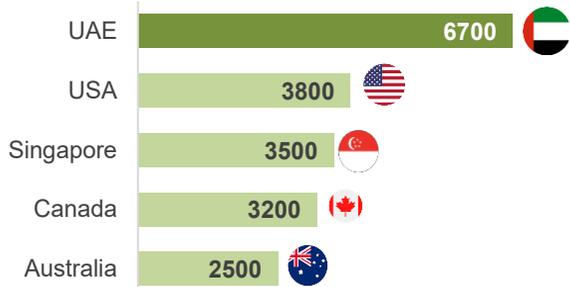
Key Takeaways:

- UAE has seen the GDP growth from **2020** (USD 349.5 B) to **2025** (USD 537.08 B) at a **CAGR of 11.3%**
- The UAE is a relatively young country, yet its accomplishment to become **6th richest country in world** have outperformed many other older and bigger countries.
- The UAE recorded a 4.1% year-on-year growth in 2025 compared to 2024.
- This is the highest growth rate among all six GCC countries.
- It indicates that the UAE experienced stronger growth than the other five member nations in the region.

Immigrants Trends in the Region

The United Arab Emirates (UAE) real GDP is projected to grow by 3.9% in 2024 and further expand to 4.1% in 2025, as reported by the World Bank. These figures reflect the UAE's efforts to diversify its economy and invest in innovation.

HNIs Movement to Top 5 countries



HNI Movements from January to June 2024.



UAE is the **world's leading destination for wealthy migrants**.



These **migrating millionaires**, comprising approximately **20% entrepreneurs and company founders**.



Property investment destination for global HNWI's - **Dubai (67%), Abu Dhabi (23%), Sharjah (5%), Ras Al Khaimah (2%)**



Global HNWI's have an **average budget of \$3.4 million** for a home in the UAE capital

Emirates Attracting High-Net-Worth Capital in UAE

Abu Dhabi

- **Global HNWI capital** for residential property: **\$408.3 Mn.**
- **1,098 non-resident investors** purchased in 2023, a **175% YoY increase**.
- **HNWI Purchase Intentions: 40%** (investment purposes), **8%** (primary residence), **15%** (second home).
- **Landmark Sale:** Share of Aldar home sales to **international non-resident buyers** increased from **3% in 2021 to 28% in 2023**.

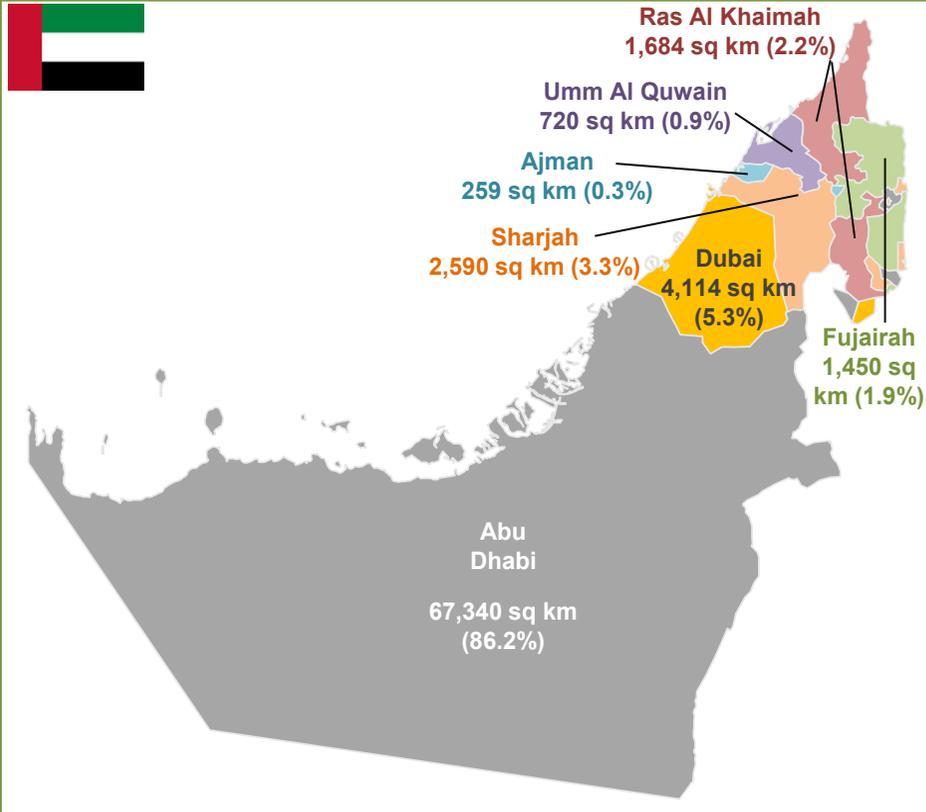
Ras Al Khaimah

- **Global HNWI capital** for residential property: **\$388.5 Mn.**
- **30% of global HNWI's** are willing to spend **\$500,000** in RAK.
- **Ultra-HNWI's (net worth > \$15 million): 37%** are ready to spend **\$2-4.9 million** on RAK property. **21%** are open to investing **over \$5 million**.
- **East Asian HNWI's: 28%** willing to commit **\$2-4.9 million** in RAK.
- **GCC Expats:** Lowest reported budget for RAK at **\$700,000**.
- **Global HNWI's:** Average **\$1.2-3.9 million**, depending on net worth.

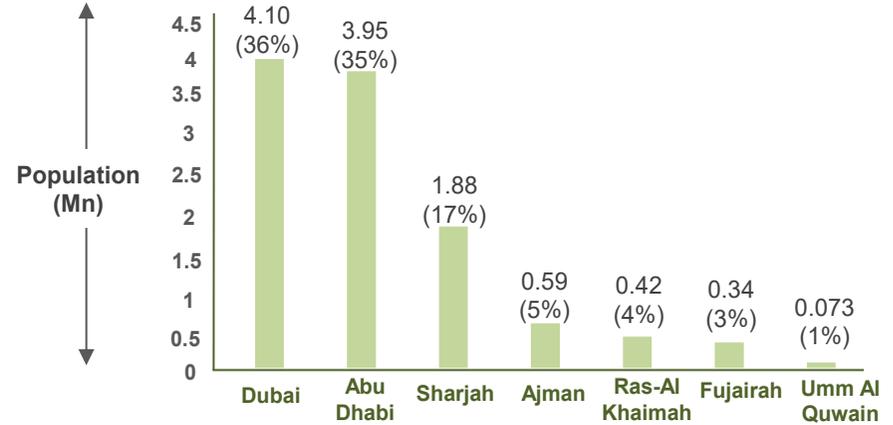
The growing inflow of high-net-worth capital into Emirates like Abu Dhabi and Ras Al Khaimah highlights **strong investor confidence and creates rising demand for premium services**.

Demographic Overview

UAE - EMIRATES



Population Distribution Across UAE – 11.35 Mn



Population Mix :

Expatriates: 10.04 Mn (88.5%)

Emiratis: 1.31 Mn (11.5%)

Demography Distribution by Age

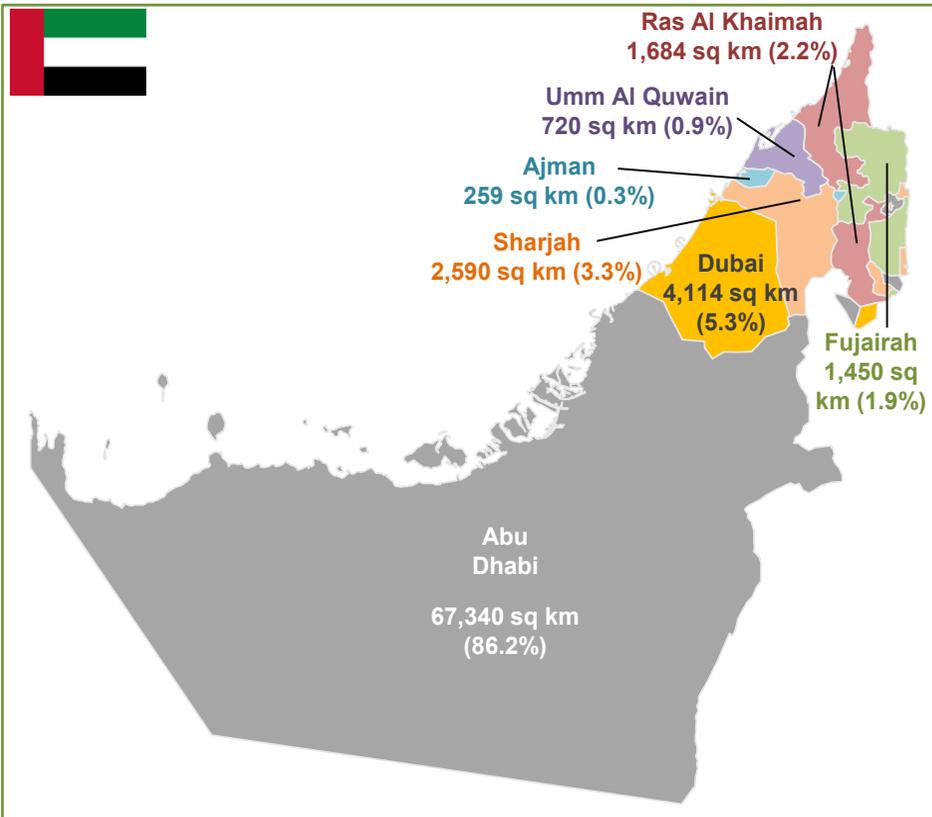
Age (yrs)	% of Total Population	Population (Mn)
0-14	16%	1.81
15-24	13%	1.44
25-54	64%	7.28
55-64	5%	0.61
65+	2%	0.20

Focus

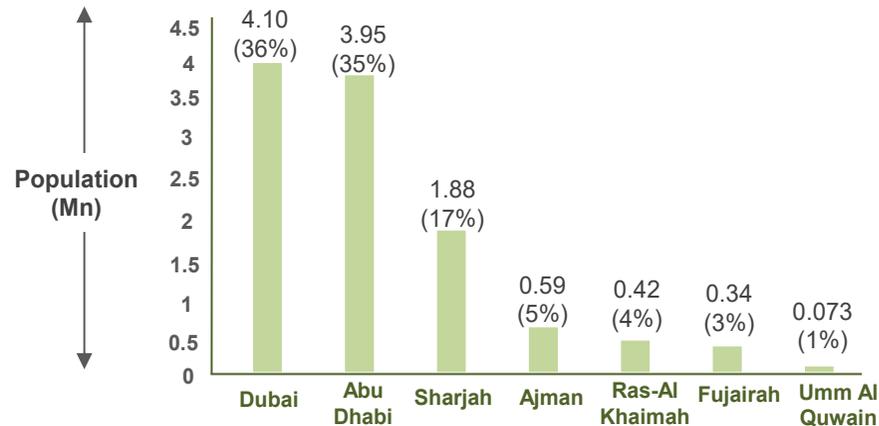
Represents the school going population segment

Demographic Overview

UAE - EMIRATES



Population Distribution Across UAE – 11.35 Mn



Key Takeaway:

- The UAE's population grew by **10.8%** from **2024** (10.24 Mn) to **2025** (11.35 Mn), representing the highest annual growth rate in the 2020-2025 period.
- **Dubai, Abu Dhabi and Sharjah** together account for about **87%** of the UAE's total population, highlighting their role as the country's major economic and urban centers.
- **Abu Dhabi** is the **largest emirate by land area (86.2% of UAE)** but has huge desert areas with low population density whereas Dubai is smaller geographically but highly urbanized, allowing it to support a much larger population.
- Emirates with diverse economies like Dubai & Abu Dhabi attract larger populations due to jobs in finance, tourism, real estate & services.
- From **2024** (1.65 Mn) to **2025** (1.81 Mn), the population of children aged **0-14 years** have grown by **9.92%**, indicating a significant expansion in the focused market.

The data reflects a clear pattern of sustained economic expansion, sectoral diversification, and rising global interest in the UAE.



- The UAE's **consistent GDP rise and strong non-oil sector performance** reflect a stable and well diversified economy. This growth trajectory is structural rather than short-lived, driven by sustained investments, policy reforms, and sectoral expansion, positioning the country as an increasingly attractive base for global talent and capital.



- The contribution of sectors like trade, manufacturing, finance, construction, and hospitality shows that economic opportunity is being generated across varied industries. As these sectors scale, they will draw in skilled professionals, service providers and related industries, which in turn will drive the need for complementary infrastructure and service ecosystems.



- Within the GCC, the **UAE continues to lead in diversification, openness to foreign investment, and population growth**. Competitive tax regimes, free zones and policy innovation place it ahead of regional peers, enabling it to attract both businesses and residents who might otherwise consider other Gulf countries.



- The UAE's status as the **top global destination for high-net-worth individuals** means an expanding base of residents with high spending capacity. This not only benefits luxury real estate but also stimulates demand in retail, leisure, hospitality, and other premium service segments.



- The UAE is entering a phase where **economic diversification and population growth are working together to create a sustained cycle of opportunity** across industries. Investors, businesses, and policymakers should recognize that the next wave of growth will not be confined to traditional economic centers but will be distributed across strategically connected Emirates.



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Overview of K-12 Education Landscape - UAE

Market Size and Key Players/Chain

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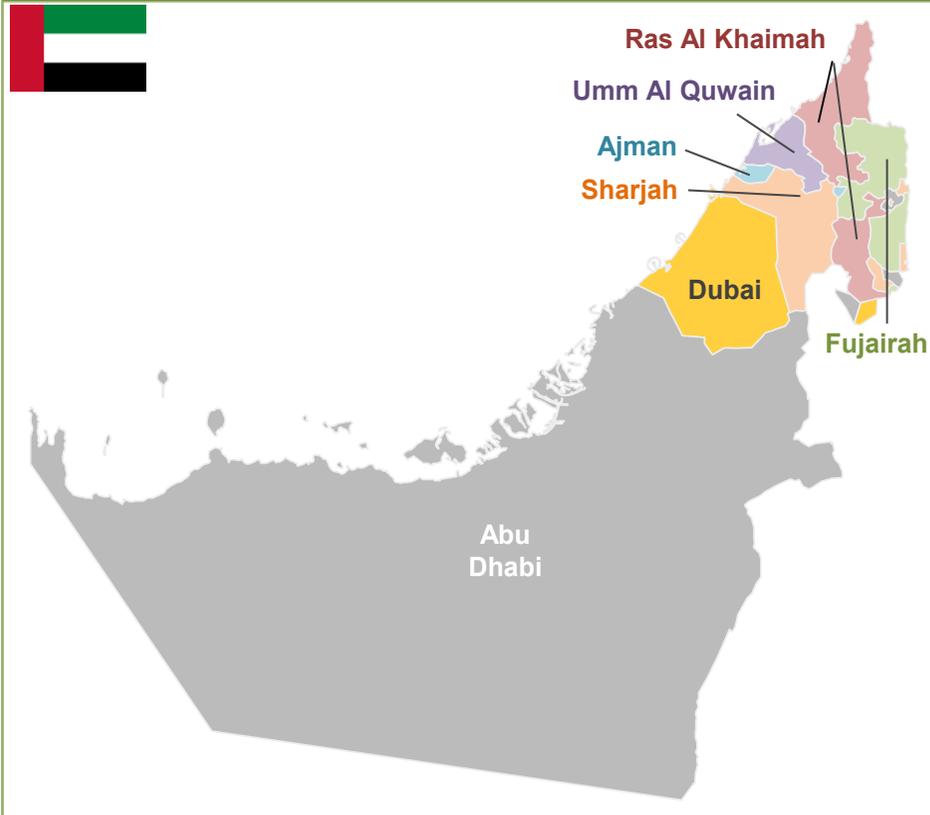
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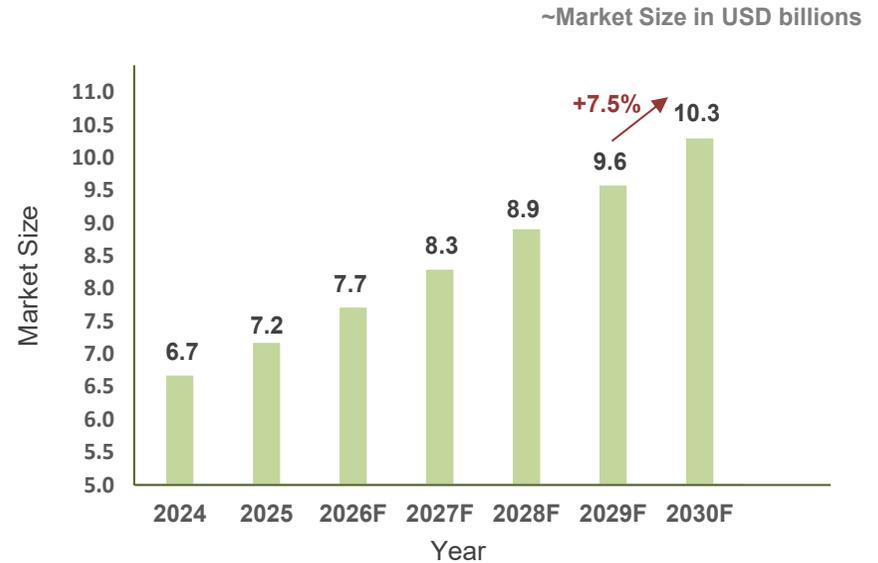
Private K-12 Education Landscape

UAE



Market Size

The UAE private K-12 education market is experiencing robust growth.



Key Takeaways

- The UAE Private K12 Education Market size is estimated at USD 6.7 billion in 2024, and is expected to reach USD 10.3 billion by 2030, at a CAGR of 7.5%.

UAE Private K-12 Education Market Key Players/Chain



GEMS Education

No. of Schools: **41**
Total Students: **1,09,000**



Taaleem

No. of Schools: **18**
Total Students: **22,944**



SABIS Education

No. of Schools: **14**
Total Students: **27,396**



Aldar Education

No. of Schools: **11**
Total Students: **13,870**



Athena Education

No. of Schools: **9**
Total Students: **14,390**



Evolve Education

No. of Schools: **5**
Total Students: **6,107**



Nord Anglia Education

No. of Schools: **4**
Total Students: **8,578**



Indian High Group of School

No. of Schools: **3**
Total Students: **22,235**



Kings Schools Group

No. of Schools: **3**
Total Students: **8,250**



ESOL Education

No. of Schools: **3**
Total Students: **2,880**



Global School Group

No. of Schools: **2**
Total Students: **4,400**



Al Futtaim Education

No. of Schools: **2**
Total Students: **4,000**

Key Market Players/Chain: GEMS Education

GEMS EDUCATION

GEMS Education is one of the oldest and largest K-12 private education providers in the world.

Estb. Year	<ul style="list-style-type: none"> UAE, 1959
Countries Operating	<ul style="list-style-type: none"> Middle East
	<ul style="list-style-type: none"> North Africa
	<ul style="list-style-type: none"> Asia
	<ul style="list-style-type: none"> Europe
	<ul style="list-style-type: none"> North America

Snapshot

Total Revenue - \$1.4 Billion

Total No. of Schools - 41

Total Student Strength – 1,09,242

Boards	No of Schools	Total Student Strength
British	20	51,383
Indian	6	29,499
American/IB	2	4,959
IB	3	5,600
British/IB	3	9,575
IB/Indian	1	3,601
British/Indian	3	4,625

USP



Holistic Wellbeing



Social & Environmental Responsibility



Inclusive Education



Value Led Education

Accreditation



Key Market Players/Chain: GEMS Education

Location of Affiliated Schools



Emirate	Name of the School	Estb	Board	Tuition Fees*	Student Strength
Dubai	GEMS Founder School-Dubai South	2012	British	30,375	3,150
	GEMS Wellington Academy-AI Khail	2013	British	59,862	2,550
	GEMS World Academy-Dubai	2008	IB	1,02,378	2,100
	GEMS First Point School	2014	British/Indian	58,274	1,400
	GEMS Royal Dubai School	2015	British	50,753	1,000
	GEMS International School-AI Khail	2013	IB	70,827	2,200
	GEMS Wellington Academy – Silicon Oasis	2005	British/IB	50,099	4,300
	GEMS Al Barsha-National School	2016	British	56,244	1,188
	GEMS Metropole School - Al Waha	2003	British	45,000	600
	GEMS AL Khaleej Inter'l School	1992	American /IB	39,173	2,059
	GEMS Modern Academy - Dubai	1986	IB/Indian	48,173	3,601
	GEMS Legacy School - Dubai	1990	Indian	11,387	5,391
	GEMS Founders School – Mizhar	2018	British	30,285	3,203
	New Millennium School - AI Khail	2000	Indian/British	31,244	1,225

*Annual fees of 5th Grade

Outstanding' as per KHDA ratings

'Very Good' as per KHDA ratings

Key Market Players/Chain: GEMS Education

Location of Affiliated Schools



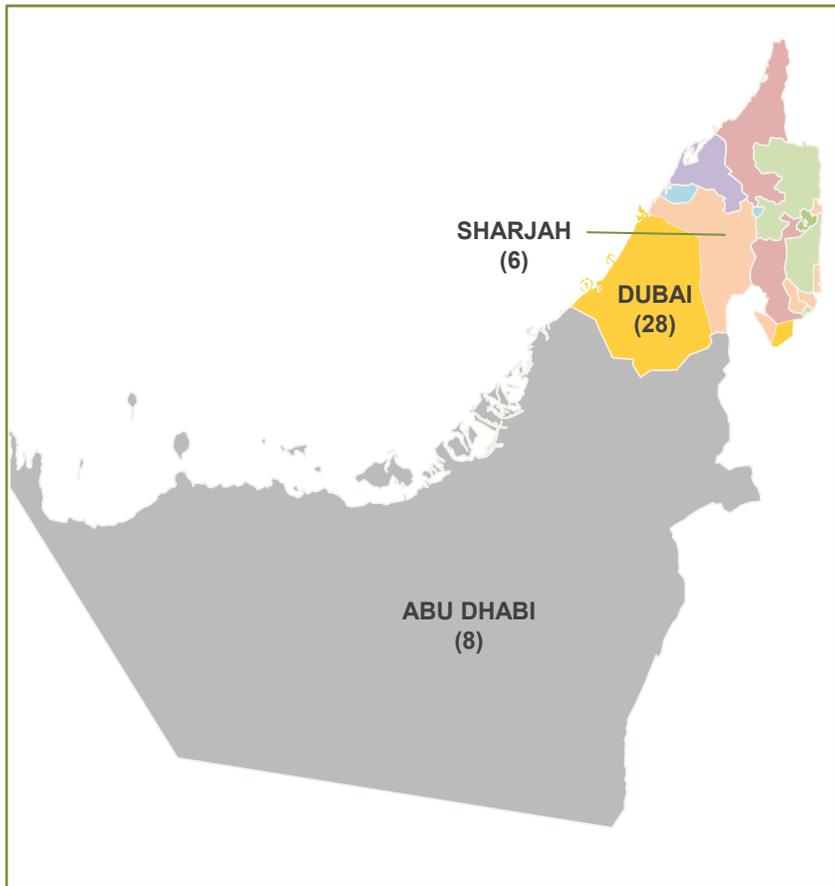
Emirate	Name of the School	Estb	Board	Tuition Fees*	Student Strength
Dubai	Cambridge International School	1983	British	29,204	4,000
	GEMS Jumeirah College	2003	British	55,714	1,200
	GEMS Dubai American Academy	1998	American /IB	93,000	2,900
	Our Own Indian School - Dubai	1991	Indian	8,250	2,800
	The Millennium School - Dubai	2000	Indian	24,189	2,200
	GEMS Our Own English High School - Dubai	1968	Indian	9,641	10,400
	Metropole School - Motor City	2014	British	45,374	2,839
	GEMS Wellington Inter'l School	2014	IB/British	59,862	4,400
	GEMS Winchester School – Dubai	2011	British	25,602	4,000
	The Westminster School - Dubai,	1995	British	11,565	1,837
	The Winchester School - Jebel Ali	2003	British	18,688	3,587
	Our Own High School - Al Warqa	2005	Indian	9,558	4,700
	New Dubai Nursery	1985	British/ Indian	13,000-16,000	240
	GEMS Founders School - Dubai	2016	British	30,375	6,140

*Annual fees of 5th Grade

 'Outstanding' as per KHDA ratings
 'Very Good' as per KHDA ratings

Key Market Players/Chain: GEMS Education

Location of Affiliated Schools



Emirate	Name of the School	Estb	Board	Tuition Fees*	Student Strength
Abu Dhabi	GEMS World Academy	2022	IB	65,680	1,300
	GEMS American Academy	2022	British/IB	65,680	875
	GEMS Founders School, Masdar City	2024	British	32,000	-
	GEMS United Indian School	1990	Indian	12,510	4,008
	GEMS Cambridge International School	2013	British	33,240	4,000
	Our Own English High School, Al Ain	1992	British/Indian	12,470	1,760
	GEMS Winchester School	2013	British	22,350	902
	The Cambridge High School	1988	British	23,840	1,837
Sharjah	Wesgreen International School	1991	British	30,650	3,200
	GEMS Cambridge International Private School	2010	British	25,695	1,850
	GEMS Westminster School	2012	British	16,990	3,100
	GEMS Millennium School	2010	Indian	22,050	2,128
	Our Own English High School, Girls	1982	Indian	9,986	3,000
	Our Own English High School, Boys	1982	Indian	9,986	3,000

*Annual fees of 5th Grade



'Outstanding' as per KHDA ratings



'Very Good' as per KHDA ratings

Key Market Players/Chain: Taaleem Education



Taaleem is one of the leading K-12 education providers in the UAE.

Estb. Year ▪ UAE, 2004

Country Operating ▪ UAE

Snapshot

Total Revenue - \$306.1 Million

Total No. of Schools - 18

Total Student Strength – 22,944

Boards	No of Schools	Total Student Strength
British	7	6,800
American	5	6,025
IB	5	8,819
French	1	1,300

USP



Professional



Pioneering



Nurturing

Accreditation



Key Market Players/Chain: Taaleem Education

Location of Affiliated Schools



Emirate	Name of the School	Estb	Board	Tuition Fees*	Student Strength
Dubai	Dubai British School Jumeirah Park	2020	British	71,950	1,800
	Dubai British Foundation	2014	British	60,000	300
	Dubai British School, Spring Area	2013	British	60,608	900
	Al-Mizhar American Academy	2005	American	57,860	650
	Greenfield Community School	2007	IB	53,980	1,400
	Jumeria Bacculaureate School	2010	IB	68,195	1,619
	Uptown International School	2018	IB	59,485	1,600
	The Children's Garden (till 6 years)	2005	EYP	42,000 (Grade 2)	-
	LLFP Meydan	2003	French	50,405	1,300
	American Academy for Girls	2005	American	57,860	975
	Dubai Schools Al Khawaneej	2021	American	38,800	1,300
	Dubai School Al Barsha	2021	American	38,800	2,700
	Dubai Schools Nad Al Sheba	2022	American	39,712	400
	Dubai British School Emirates Hills	2013	British	60,608	900
	Dubai British School Jumeirah Park	2020	British	71,950	1,800
	Jebel Ali School	1977	British	49,630	2,000

*Annual fees of 5th Grade

Key Market Players/Chain: Taaleem Education

Location of Affiliated Schools



Emirate	Name of the School	Estb	Board	Tuition Fees*	Student Strength
Abu Dhabi	Raha Inter'l School, Garden Campus	2007	IB	57,710	2,200
	Raha Inter'l School, Khalifa Campus	2020	IB	57,220	2,000

*Annual fees of 5th Grade



'Outstanding' as per KHDA ratings



'Very Good' as per KHDA ratings

Key Market Players/Chain: SABIS Education



SABIS is a global education network that has an active presence in 21 countries on five continents and educates students in both the private and public sectors.

Estb. Year	<ul style="list-style-type: none"> Lebanon, 1886
Countries Operating	<ul style="list-style-type: none"> North America
	<ul style="list-style-type: none"> Africa
	<ul style="list-style-type: none"> Asia
	<ul style="list-style-type: none"> South America
	<ul style="list-style-type: none"> Europe

Snapshot

Total Revenue: \$44.5 Million

Total No. of Schools: 14

Total Student Strength: 27,396

Boards	No of Schools	Total Student Strength
SABIS	14	27,396

USP



Do your Best



Respect Others



Embrace Empathy



Always Try



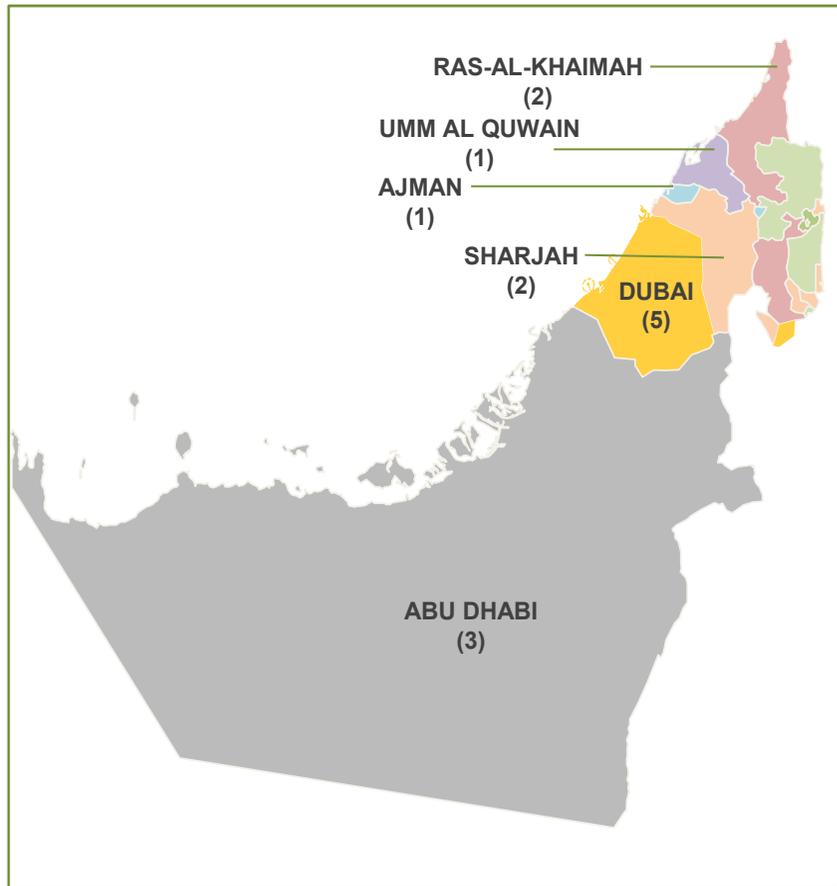
Manage Yourself

Accreditation



Key Market Players/Chain: SABIS Education

Location of Affiliated Schools



Emirate	Name of the School	Estb	Board	Tuition Fees*	Student Strength
Dubai	ISC-Abu Dhabi	1978	SABIS	26,710	3,600
	SIS-Al Bateen	2024	SABIS	32,124	796
	ISC Khalifa City	2006	SABIS	26,710	3,329
	ISC-Dubai	1993	SABIS	30,738	4,000
	ISC-DIP	2012	SABIS	36,289	2,790
Abu Dhabi	SIS-Ruwais	2001	SABIS	35,886	2,500
	SIS-Yas Island	2015	SABIS	49,500	712
	MHS Al Dhafra	1983	SABIS	40,200	-
Ajman	ISC-Ajman	2016	SABIS	40,000	-
RAK	ISC-Al Ain	1980	SABIS	26,540	2,903
	ISC-Ras Al Khaimah	1986	SABIS	33,000	-
Sharjah	SIS-Aljada	2021	SABIS	34,000	1,243
	ISC-Sharjah	1976	SABIS	27,100	4,000
Umm Al Quwain	ISC-Umm Al Quwain	1993	SABIS	29,500	1,523

*Annual fees of 5th Grade



'Outstanding' as per KHDA ratings



'Very Good' as per KHDA ratings

Key Market Players/Chain: Aldar Education



Aldar Education began in 2007 with a single school and has since expanded to serve over 38,000 students

Estb. Year	▪ UAE, 2007
Country Operating	▪ UAE

Snapshot

Total Revenue: \$234.7 Million

Total No. of Schools: 11

Total Student Strength: 13,870

Boards	No of Schools	Total Student Strength
British	7	9,340
American	2	2,230
British/IB	2	2,300

USP



State of the Art Facilities



Diverse Community



Innovative Learning Approach

Accreditation



ACE School of CHARACTER



وزارة التعليم والمعرفة
DEPARTMENT OF EDUCATION AND KNOWLEDGE

SPEARS 500



Key Market Players/Chain: Aldar Education

Location of Affiliated Schools



Emirate	Name of the School	Estb	Board	Tuition Fees*	Student Strength
Dubai	Kent College Dubai	2016	British/IB	79,688	1,200
Abu Dhabi	Mamoura British Academy	2016	British	55,940	1,200
	Muna British Academy	2009	British	50,936	800
	Noya British School	2024	British	37,000	500
	Pearl British Academy	2007	British	46,030	720
	Yasmina British Academy	2008	British	51,180	3,400
	Virginia International Private School	2015	American	37,180	1,200
	YAS American Academy	2016	American	59,330	1,100
	Bateen World Academy	2011	British/IB	62,600	1,100
	Al Shohub Private School	1999	British	33,420	620
Cranleigh Abu Dhabi	2012	British	88,010	2,100	

*Annual fees of 5th Grade



'Outstanding' as per KHDA ratings



'Very Good' as per KHDA ratings

Key Market Players/Chain: Athena Education



Athena focuses on delivering high-quality education through innovative teaching, accredited programs

Estb. Year	▪ UAE, 2015
Countries Operating	▪ Asia

Snapshot

Total Revenue: \$39.6 Million

Total No. of Schools: 9

Total Student Strength: 14,390

Boards	No of Schools	Total Student Strength
British	4	6,825
American	5	7,565

USP



Emotional Intelligence



Innovative Thinking



Local Roots, Global Vision



Growth Mindset

Accreditation and University Partners



Key Market Players/Chain: Athena Education

Location of Affiliated Schools



Emirate	Name of the School	Estb	Board	Tuition Fees*	Student Strength
Dubai	Al Sadiq Islamic English School	1989	British	13,060	2,200
	Grammar School	1970	British	15,925	1,300
	Oaktree Primary School	2016	British	23,500	600
	American International School	2003	British	21,576	2,725
	International Academic School	2006	American	22,141	1,200
Sharjah	Al Zuhour Private School	1995	American	17,528	3,000
	Al Wahda Private School	2004	American	23,360	1,065
	Al Resalah Int'l School of Science	2003	American	25,118	1,300
	Al Resalah American Int'l School	2015	American	23,950	1,000

*Annual fees of 5th Grade



'Outstanding' as per KHDA ratings



'Very Good' as per KHDA ratings

Key Market Players/Chain: Evolvence Education



Evolvence Education (EKI), founded in 2006 in the UAE, partners with Repton UK to deliver premium British curriculum schools across the GCC and beyond

Estb. Year	▪ UAE, 2006
Countries Operating	▪ Middle East

Snapshot

Total Group Revenue: \$30 Million

Total No. of Schools: 5

Total Student Strength: 6,107

Boards	No of Schools	Total Student Strength
British	4	5,107
British/IB	1	1,300

USP



Educational Excellence



Well-Rounded Learning



Student success



Social Responsibility



Culture Inclusive



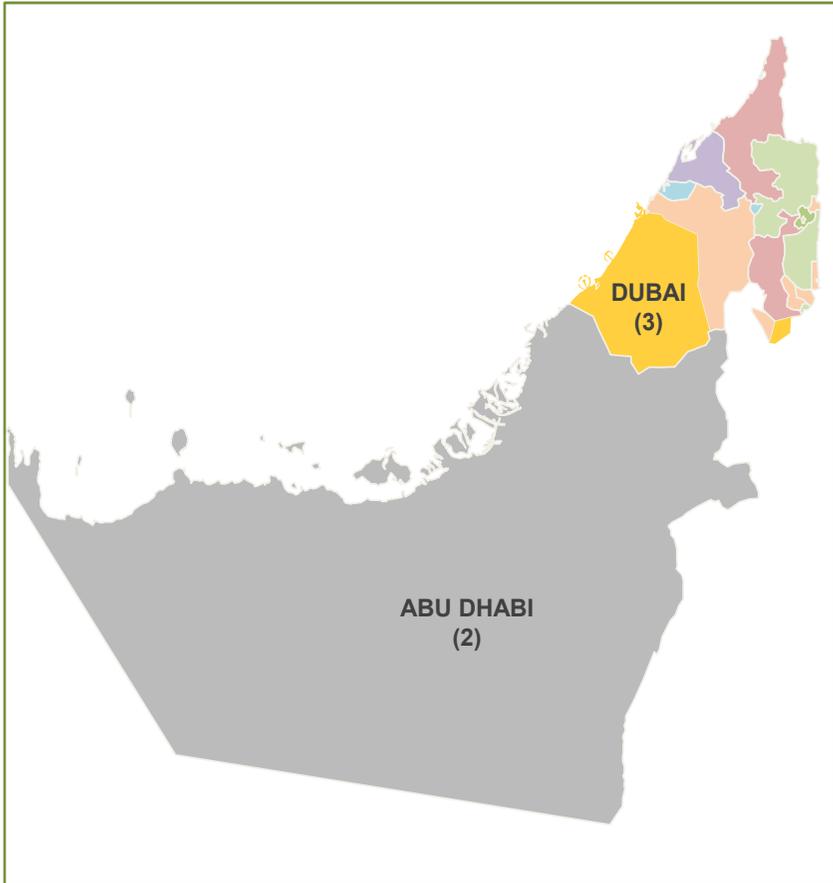
Inspirational Leadership

Accreditation



Key Market Players/Chain: Evolvence Education

Location of Affiliated Schools



Emirate	Name of the School	Estb	Board	Tuition Fees*	Student Strength
Dubai	Repton School Dubai	2017	British/IB	75,953	1,300
	Dovecote	2012	British	14,750	372
	Repton School Al Barsha	2013	British	75,953	2,300
Abu Dhabi	Humpty Dumpty Nursery	1991	British	11,700	135
	Repton School Abu Dhabi	2013	British	71,120	2,300

*Annual fees of 5th Grade



'Outstanding' as per KHDA ratings



'Very Good' as per KHDA ratings

Key Market Players/Chain: Nord Anglia Education



Nord Anglia Education is a leading provider of IB education Worldwide

Estb. Year

- UK, 1972

Countries Operating

- North America
- Middle East
- South America
- Asia
- Europe

Snapshot

Total Group Revenue: \$1.1 Billion

Total No. of Schools: 4

Total Student Strength: 8,578

Boards	No of Schools	Total Student Strength
British/IB	2	4,378
IB	1	2,700
British	1	1,500

USP



Respect



Integrity



Commitment



Responsibility

Accreditation



Key Market Players/Chain: Nord Anglia Education

Location of Affiliated Schools



Emirate	Name of the School	Estb	Board	Tuition Fees*	Student Strength
Dubai	Swiss International Scientific School Dubai	2015	IB	83,000	2,700
	Nord Anglia International School Dubai	2014	British/IB	85,032	2,740
Abu Dhabi	The British International School Abu Dhabi	2009	British/IB	69,881	1,638
	Nord Anglia International School Abu Dhabi	2013	British	87,030	1,500

*Annual fees of 5th Grade



'Outstanding' as per KHDA ratings



'Very Good' as per KHDA ratings

Key Market Players/Chain: Indian High Group of Schools Education



The Indian High group of schools Education is a leading provider of Indian K-12 education.

Estb. Year ■ UAE, 1961

Countries Operating ■ Middle East

Snapshot

Total Revenue - \$12.1 Million

Total No. of Schools - 3

Total Student Strength – 22,235

Boards	No of Schools	Total Student Strength
Indian	3	22,235

USP



Innovative Thinking



Growth Mindset



**Local Roots,
Global Vision**

Accreditation

KHDA



Key Market Players/Chain: Indian High Group of Schools Education

Location of Affiliated Schools



Emirate	Name of the School	Estb	Board	Tuition Fees*	Student Strength
Dubai	The Indian High School Al Garhoud	1988	CBSE	5,525	4,235
	The Indian High School Oud Metha	1961	CBSE	5,525	15,000
	The Indian High School DSO	2012	CBSE	11,292	3,000

*Annual fees of 5th Grade



'Outstanding' as per KHDA ratings



'Very Good' as per KHDA ratings

Key Market Players/Chain: Kings Education



Kings' Education is a premium group of British Curriculum schools, known for academic excellence and outstanding KHDA ratings.

Estb. Year	▪ UAE, 2004
Country Operating	▪ Middle East

Snapshot

Total Revenue: \$90.4 Million

Total No. of Schools: 3

Total Student Strength: 8,250

Boards	No of Schools	Total Student Strength
British	3	8,250

USP



Innovation



Global Citizenship



Inclusion



Critical Thinking

Accreditation



Key Market Players/Chain: Kings Education

Location of Affiliated Schools



Emirate	Name of the School	Estb	Board	Tuition Fees*	Student Strength
Dubai	Kings' School Dubai	2004	British	71,801	2,000
	Kings' School Al Barsha	2014	British	73,595	3,100
	Kings' School Nad Al Sheba	2008	British	70,086	3,150

*Annual fees of 5th Grade

'Outstanding' as per KHDA ratings
 'Very Good' as per KHDA ratings

Key Market Players/Chain: Esol Education



ESOL Education is a leading provider of international K–12 education.

Snapshot

Total Revenue: \$40.2 Million

Total No. of Schools: 3

Total Student Strength: 2,880

Boards	No of Schools	Total Student Strength
American/IB	2	2,080
IB	1	800

Estb. Year

- UAE, 1993

Countries Operating

- Europe
- Asia
- Africa

USP



Well-Rounded Learning



Measurement through student success



Social Responsibility



Inspirational Leadership

Accreditation



Key Market Players/Chain: Esol Education

Location of Affiliated Schools



Emirate	Name of the School	Estb	Board	Tuition Fees*	Student Strength
Dubai	Dunecrest American School	2018	American/IB	80,550	780
	Fairgreen International School	2018	IB	77,750	800
Abu Dhabi	American International School	1995	American/IB	50,910	1,300

*Annual fees of 5th Grade



'Outstanding' as per KHDA ratings



'Very Good' as per KHDA ratings

Key Market Players/Chain: Global Schools Education



GSF is a Singapore-based not-for-profit platform administering GSF-affiliated schools internationally.

Estb. Year	<ul style="list-style-type: none"> ▪ Singapore, 2002
Countries Operating	<ul style="list-style-type: none"> ▪ Middle East ▪ Asia ▪ Europe

Snapshot

Total Group Revenue: \$40.2 Million

Total No. of Schools: 2

Total Student Strength: 4,400

Boards	No of Schools	Total Student Strength
Montessori/CBSE	2	4,400

USP



Innovation



Always Try



Respect



Critical Thinking

Accreditation



Cambridge Assessment International Education

International General Certificate for Secondary Education

Key Market Players/Chain: Global Schools Education

Location of Affiliated Schools



Emirate	Name of the School	Estb	Board	Annual Fees*	Student Strength
Dubai	GIIS Dubai	2017	Montessori /CBSE	31,082	2,800
Abu Dhabi	GIIS Abu Dhabi	2015	Montessori /CBSE	12,850	1,600

*Annual fees of 5th Grade

'Outstanding' as per KHDA ratings
 'Very Good' as per KHDA ratings

Key Market Players/Chain: AI Futtaim Education



A non-profit educational initiative established by the AI-Futtaim family, AFEF supports the UAE's Centennial Vision through a network of premium schools

Estb. Year	<ul style="list-style-type: none"> UAE, 1930
Countries Operating	<ul style="list-style-type: none"> Middle East
	<ul style="list-style-type: none"> North Africa
	<ul style="list-style-type: none"> Asia

Snapshot

Total Group Revenue: \$9.3 Billion

Total No. of Schools: 2

Total Student Strength: 4,000

Boards	No of Schools	Total Student Strength
British/IB	1	2,000
American/IB	1	2,000

USP



Holistic Learning



Community Openness



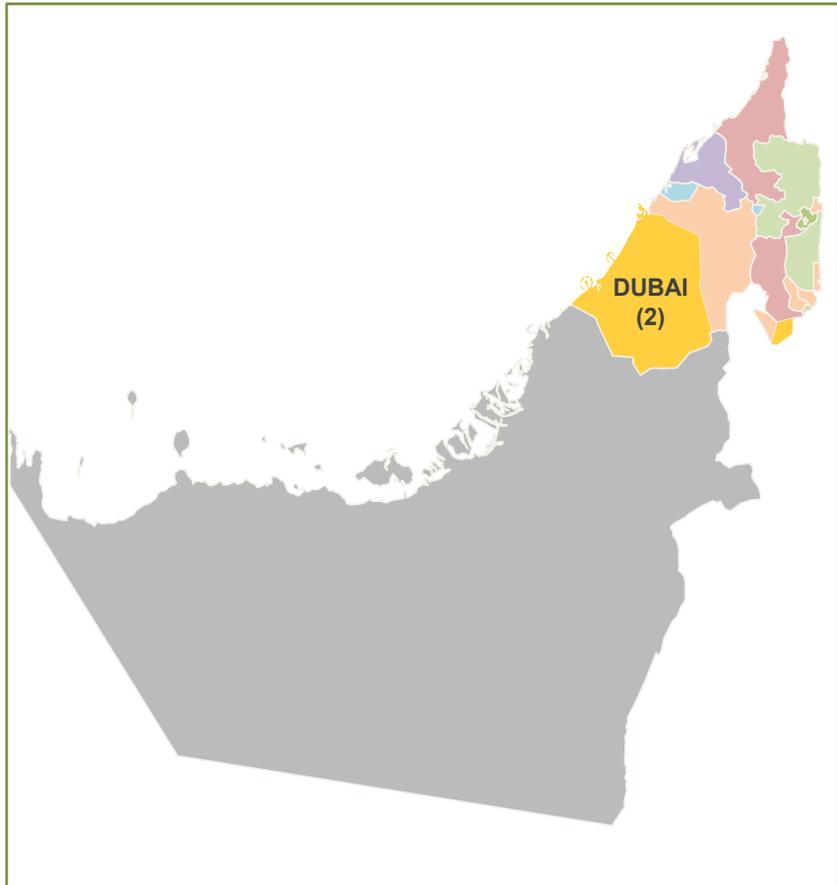
Preparedness for future Opportunities

Accreditation



Key Market Players/Chain: Al Futtaim Education

Location of Affiliated Schools



Emirate	Name of the School	Estb	Board	Tuition Fees*	Student Strength
Dubai	Deira International School	2005	British/IB	58,034	2,000
	Universal American School	2005	American/IB	73,419	2,000

*Annual fees of 5th Grade



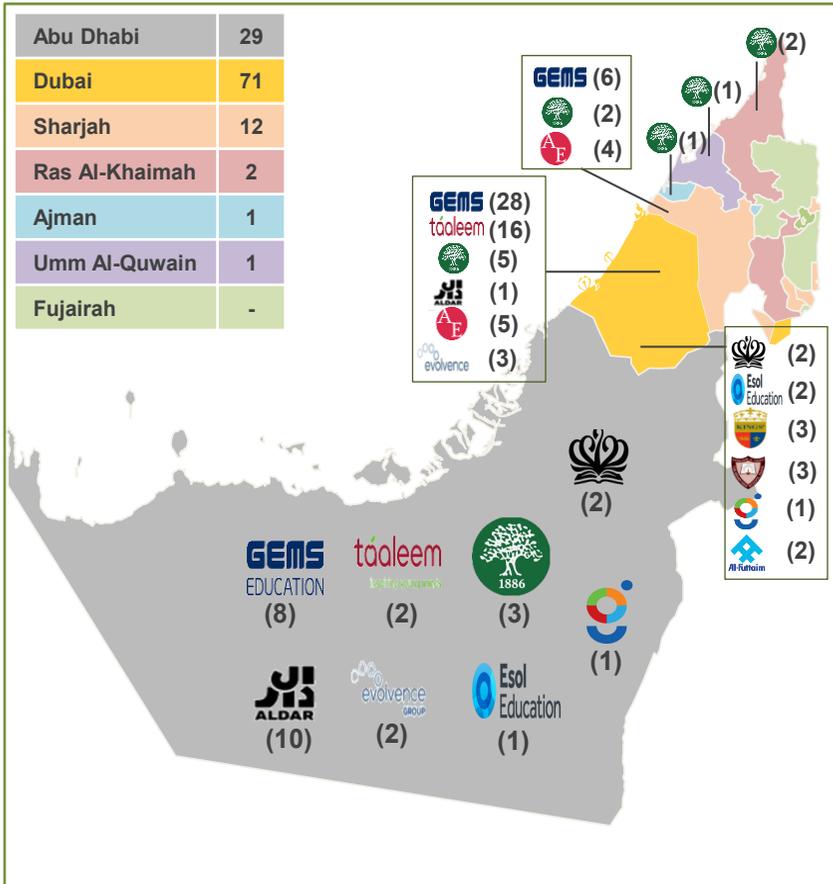
'Outstanding' as per KHDA ratings



'Very Good' as per KHDA ratings

Location of Schools

Abu Dhabi	29
Dubai	71
Sharjah	12
Ras Al-Khaimah	2
Ajman	1
Umm Al-Quwain	1
Fujairah	-



Market Leadership, Expansion Potential and Emerging Opportunities in UAE

The private education sector in the UAE is dominated by large school groups, with **GEMS Education** being the clear market leader, operating the highest number of schools across Dubai and Abu Dhabi.

Geographic Concentration

- **Dubai** hosts the largest cluster of private schools (71), reflecting its role as the commercial and expatriate hub of the country.
- **Abu Dhabi** follows with 29 schools, driven by strong demand from both local and expatriate families.
- **Sharjah** and other northern emirates such as Ajman, Ras Al Khaimah, and Umm Al Quwain remain relatively underserved, offering expansion opportunities for established operators.

Market Characteristics

- Over 85% of premium and top tier schools are located in Dubai and Abu Dhabi, reflecting these Emirates' higher expatriate concentrations, affluent populations, and stronger demand for international standard education.
- Growing demand for quality education in underserved emirates and the government's emphasis on education quality standards create space for new players with strong academic and operational models to enter the market.

Key Insight

While Dubai and Abu Dhabi are saturated with well-established players, the **northern emirates represent a strategic growth frontier**. Leading groups are likely to explore these underserved markets as demand for high-quality private education continues to rise.



Monograph: August 2025

Strategic Insights into the Evolving Private Education Landscape of the UAE

Overview of K-12 Education Landscape - UAE

Curriculum Trends

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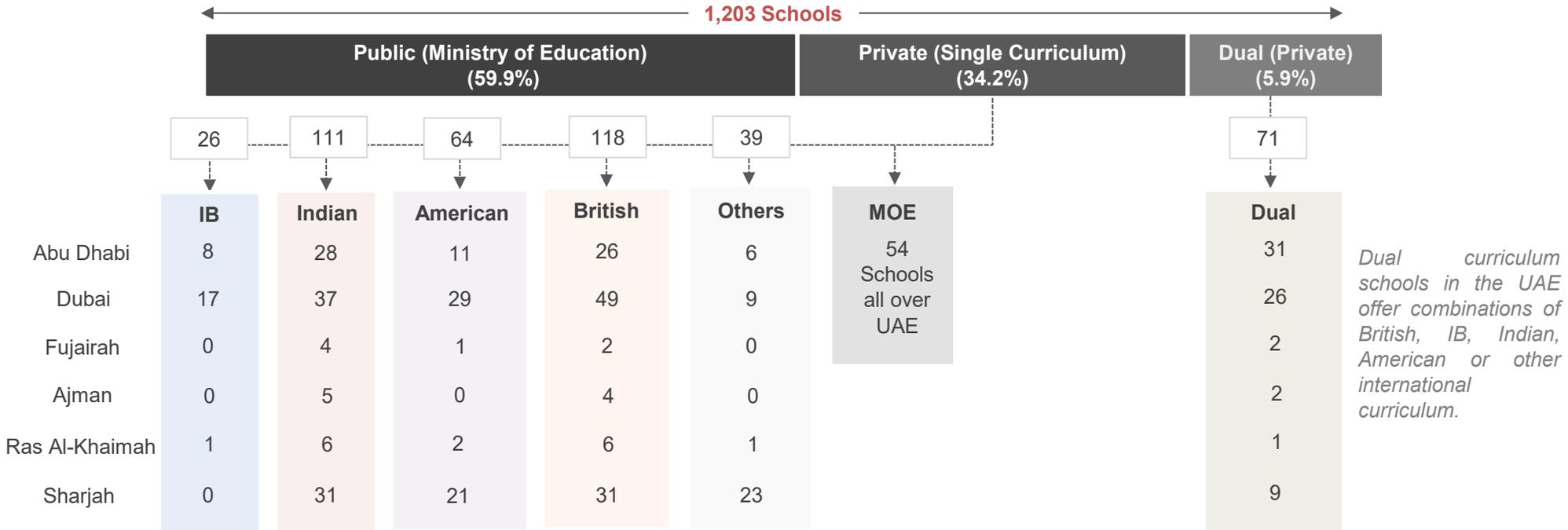
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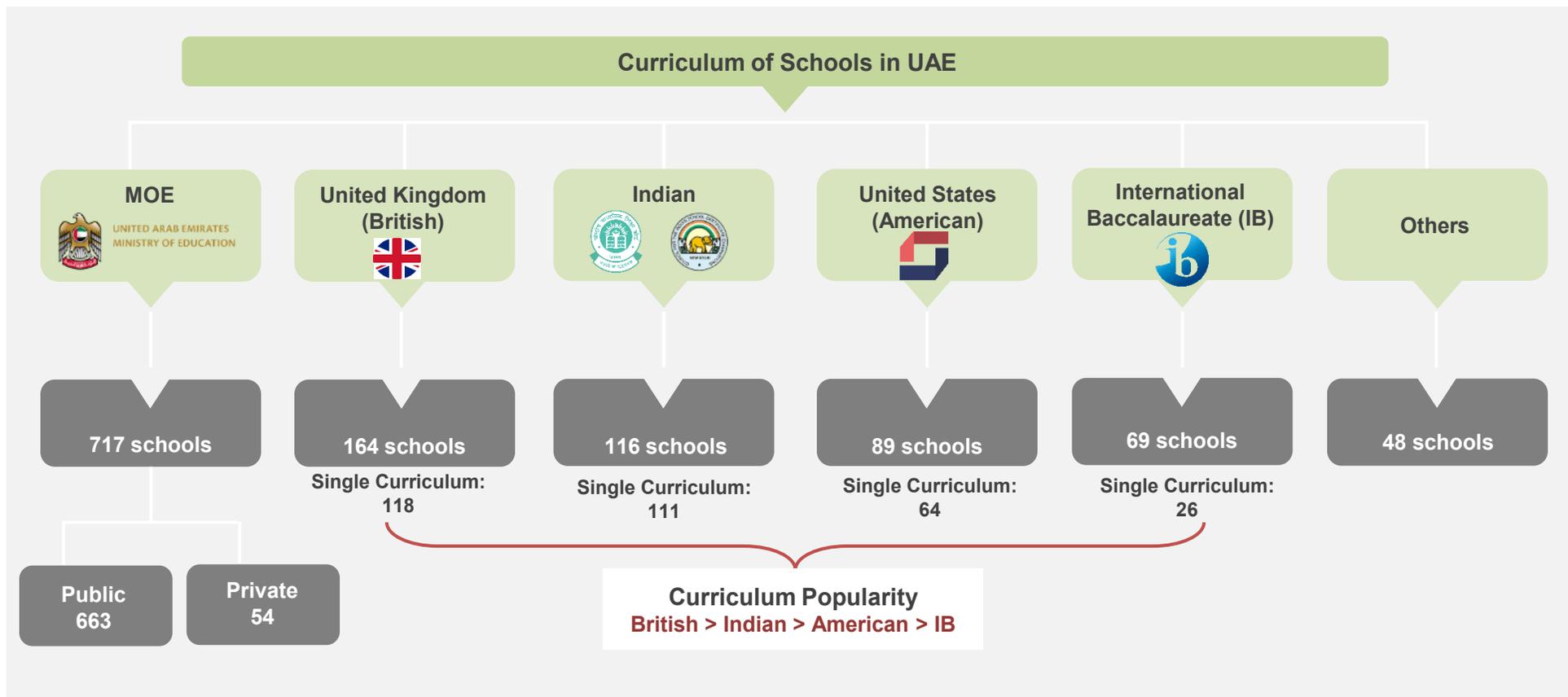
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Landscape of K-12 Schools in UAE



Curriculum Followed by Schools



"Others" refers to Iranian, Philippine, Pakistani, SABIS, German, Russian, Japanese, Chinese, Australian, Bangladeshi etc.

~Several schools follow dual curriculum models.

Curriculum Trends across Emirates

Dominant Curriculum Emirate-wise

Abu Dhabi	Dubai	Sharjah		Ajman	Fujairah	Ras Al-Khaimah	
British	British	Indian	British	British	Indian	Indian	British

Fee segmentation varies across Emirates, reflecting differences in income levels and parents' willingness to invest in education in different curriculums.

 Indian Medium-Low Fees <p>Indian curriculum schools in every Emirate generally fall under the medium to low fee segment as they cater largely to middle income population seeking affordable yet quality education.</p>	 British Premium-High Fees <p>British curriculum schools in every Emirate dominate the premium to high fee segment as the curriculum has strong demand among globally oriented professionals and is widely accepted by diverse expatriate communities across the UAE.</p>
--	---

Other Key Curriculum in UAE

- **American curriculum schools are largely present in Dubai, Abu Dhabi, and Sharjah**, where they have a significant number of schools. They operate in the **high to premium fee segment** and are largely preferred by American expatriate families and those seeking a U.S. based pathway to higher education.
- **IB curriculum schools** remain fewer in number and **mostly concentrated in Dubai**. They are positioned in the **premium fee segment** and are increasingly attracting demand from globally mobile expatriate professionals due to their international recognition and holistic approach.

The UAE's private K–12 education market is expanding, with enrolment patterns influenced by expatriate demographics and curriculum preferences.

- The UAE's private K-12 education sector is projected to grow from USD 6.7 billion in 2024 to USD 10.3 billion by 2030, at a CAGR of 7.5%. This sustained **growth is driven by continuous expatriate inflow, rising disposable incomes and a strong emphasis on high quality, globally recognized education.**
- **Dubai and Abu Dhabi dominate the private K-12 landscape** by hosting the majority of private schools due to their large, diverse expatriate populations, developed infrastructure and status as economic and lifestyle hubs. Sharjah and other Emirates, while smaller in scale are also expanding their education offerings to cater to growing communities.
- With over 88% of the UAE's population being expatriates, **demand for private schooling significantly outweighs public education.** International standard schools cater to a wide range of cultural and linguistic needs, which is a key factor in attracting international and professional families towards the educational institutions of UAE.
- The UAE market shows a steady shift toward premium and mid-premium school segments as families increasingly prioritize quality teaching staff, advanced facilities and innovative learning approaches over purely cost based decisions.
- The diversity of the UAE's expatriate population has shaped a schooling landscape where certain international curriculum dominate. Families of affluent working professionals often prioritize systems recognized for academic rigorous and global acceptance, influencing enrolment patterns across British, Indian, American, and IB schools. The **British curriculum holds the largest share** as it is widely regarded for its structured progression, strong academic reputation, and smooth transition pathways to universities in multiple countries, making it a preferred choice for both expatriate and high income local families.
- **Government initiatives** such as investor friendly education regulations and streamlined licensing processes, continue to **encourage new school operators and international education brands to enter the market.**
- While Dubai and Abu Dhabi remain the largest markets, population growth in Sharjah, Ras Al Khaimah and other Northern Emirates indicates untapped potential for targeted private school investments, especially in underserved high demand communities.





Monograph: August 2025

Strategic Insights into the Evolving Private Education Landscape of the UAE

Overview of K-12 Education Landscape - UAE

Education Regulatory Authorities in UAE

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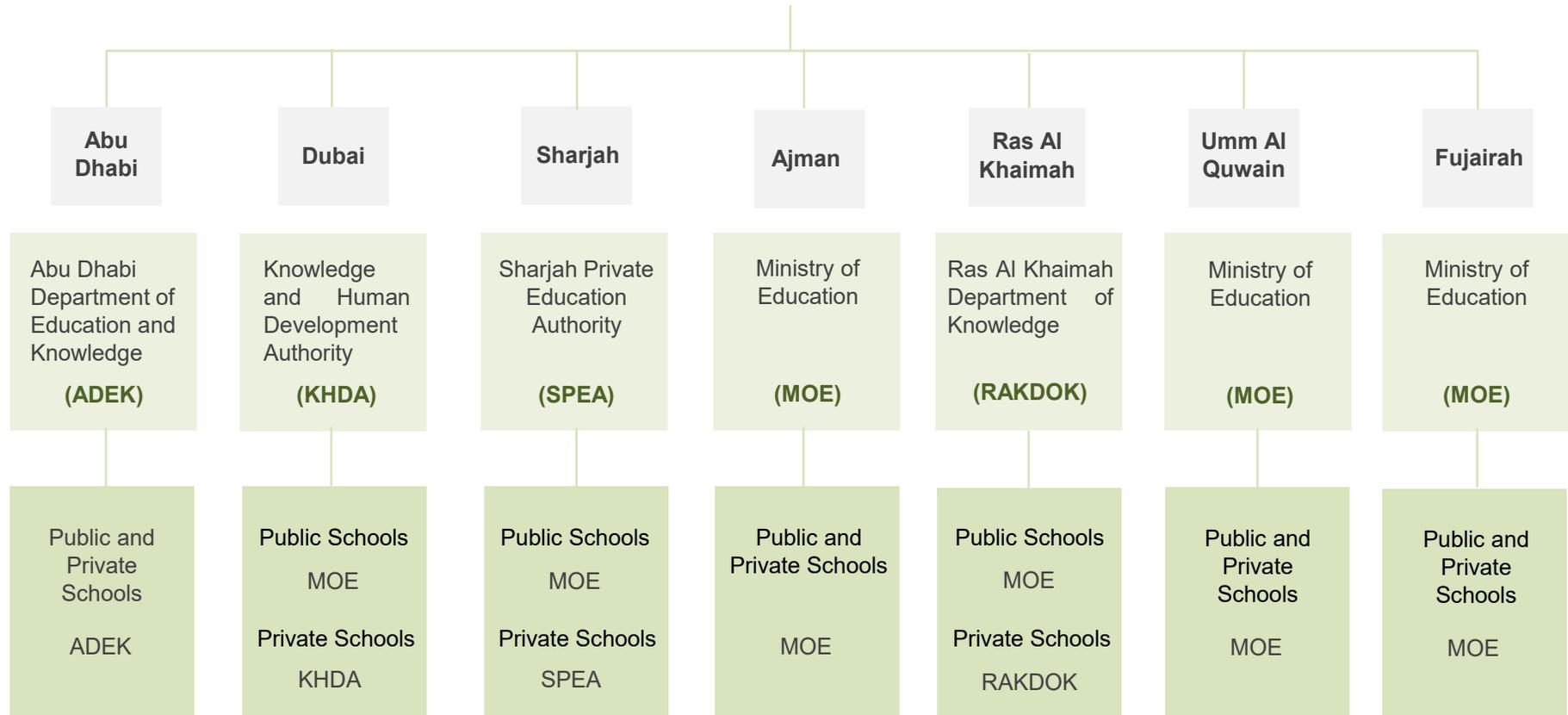
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Education Authorities in each Emirates

● Key Education Authorities Oversee Regulation of Public and Private Schools in Each Emirate ●



Education Authorities in each Emirates

Abu Dhabi Department of Education and Knowledge

(ADEK)

- Oversees both public and private schools in Abu Dhabi Emirate.
- Sets education policy, licensing requirements, and performance standards.
- Conducts inspections and quality assessments for all schools.
- Implements initiatives to improve teaching quality, student performance, and innovation in education.
- Promotes partnerships with global institutions to raise education standards.

Knowledge and Human Development Authority

(KHDA)

- Regulates private schools in Dubai.
- Issues licenses and conducts annual school inspections with detailed performance reports.
- Publishes ratings for transparency, guiding parents in school selection.
- Supports innovation and alternative learning approaches in the private sector.
- Works closely with international curriculum providers to ensure global quality benchmarks.

Sharjah Private Education Authority

(SPEA)

- Regulates private schools in Sharjah.
- Responsible for licensing, inspections and teacher approval processes.
- Focuses on improving educational outcomes and compliance with local regulations.
- Encourages adoption of diverse curriculum to meet expatriate community needs.
- Oversees initiatives for school improvement and student well being.

Ras Al Khaimah Department of Knowledge

(RAKDOK)

- Regulates private schools in Ras Al Khaimah.
- Manages licensing, compliance checks and teacher approvals for private institutions.
- Implements quality assurance frameworks to improve academic standards.
- Encourages investments in premium and innovative school models.
- Collaborates with local and international education stakeholders to enhance the learning environment.

Ministry of Education

(MOE)

- All public schools across the UAE, except in Abu Dhabi are managed by the MOE, while private schools in Ajman, Umm Al Quwain and Fujairah are also regulated directly by the Ministry.
- Sets and enforces federal education policies, curriculum frameworks and teacher standards.
- Approves the establishment of new schools and ensures compliance with safety and quality norms.
- Conducts school inspections and monitors performance against national benchmarks.



Monograph: August 2025

Strategic Insights into the Evolving Private Education Landscape of the UAE

Opportunity for establishing new K-12 school in UAE

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Private Education Expansion Creating New Opportunities



The UAE has achieved universal access to education under its “*Education for All*” initiative and is now focused on the **next challenge of delivering quality education aligned with UAE Vision 2021 and the UN’s Sustainable Development Goal 4 (Quality Education).**



Private Sector’s Role in Advancing Quality Education



To reach this goal, the government emphasizes innovation, smart learning, and international competitiveness. **Private education plays a central role, as it provides the diversity of curriculum, global standards and investment needed to complement public initiatives.**

Current Private Schools Landscape

74%
Enrolled in
Private Schools
till 2025

Emirates	Private Schools
Abu Dhabi	251
Dubai	227
Sharjah	130
Ajman	45
RAK	37
Fujairah	25
Umm Al Quwain	12
Total	727



- The UAE has **727 private schools across Emirates**, representing the backbone of the education system. Education authorities are actively **encouraging private sector participation**, providing a supportive framework for establishing new institutions, **as part of efforts to expand capacity and achieve the national vision for delivering quality education.**

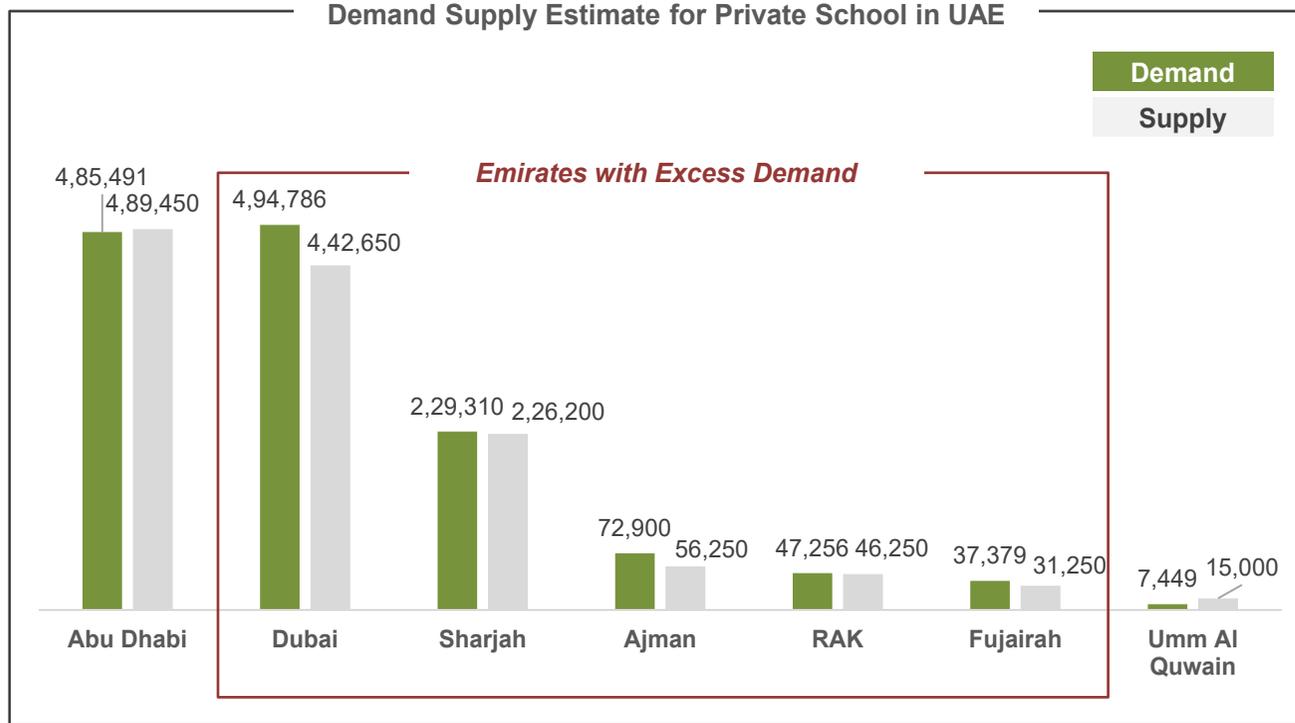


- The number of private school enrollments continues to rise, **driven by the growing expatriate population and their preference for quality education**, leading to the establishment of **new educational institutions in significant numbers over the coming years to meet this demand.**

Opportunity

Dubai and Abu Dhabi remain the largest hubs and continue to see new schools being established, but the other Emirates such as Ras Al Khaimah, Fujairah, Ajman, and Umm Al Quwain remain underserved and represent clear opportunities for future expansion.

67,521 Excess Demand in UAE for Private Schools



Key Takeaways

- **Total demand (1,374,571) exceeds the total supply (1,307,050) by 67,521**, highlighting a net **shortfall of K-12 school seats** across the UAE.
- **RAK shows a modest excess demand of 1,006 seats**, suggesting a potential opportunity for a **new school**, especially if positioned with premium or differentiated offerings.
- **Ajman and Fujairah show significant demand-supply gaps** (16,650 and 6,129 respectively), which can be addressed by establishing schools in nearby accessible areas within a 60-minute commute from target zones.
- **Dubai** has maximum private schools and still has the biggest gap indicating that the market is underserved.

Growing Opportunities for New School in the UAE

- The **UAE's stable economy, strong infrastructure, and supporting investment education policies make it an ideal environment** for establishing and scaling high quality schools.
- The **evolving demographics of UAE is driving demand for educational institutions**. Continued population inflow of expatriate families with school going age children is shaping sustained demand for private education. The shift from short term to long term residency makes quality schooling a key decision factor for relocating families.
- While Dubai and Abu Dhabi host the largest number of premium schools, several other emirates have far fewer institutions relative to the size and needs of their student population.
- Emirates such as **Ras Al Khaimah, Ajman, Fujairah and Umm Al Quwain have smaller private school networks** but are experiencing steady residential and economic development, indicating space for quality education providers.
- New entrants in underserved emirates can secure strong enrolment numbers and brand recognition before the market becomes competitive.
- Education authorities across the emirates are **encouraging private sector participation**, creating a supportive framework for establishing new institutions.
- Population growth, rising incomes, and long term expatriate settlement trends encourages a strong future enrollments of students in untapped emirates, ensuring stability for new school investments.



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on the Indian
education sector



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