

# Kuwait Education Market Outlook to 2022

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New Delhi , The report titled, “Kuwait Education Market Outlook to 2022 - by K-12 Education, Higher Education, E-Learning, Vocational Training, Teacher Training, Private Tutor and Test-Preparation Education Market” covers the K-12 private education market size (by revenue, number of schools, number of teachers, number of classrooms and number of students), current emerging trends and developments, major issues and challenges, customer pain points & decision making parameters, investment model, along with market segmentation by level of education (Kindergarten, Primary, Intermediate and Secondary), by gender (Male and Female), by nationality (Kuwaitis and non-Kuwaitis) and by region (Al Asema, Hawalii, Al Ahmadii, Al Farwaniya, Al Jahra Education and Mobark Al Kaber). The report presents competitive landscape of leading British, American and Indian schools and the major test preparation centers. Parameters such as type of curriculum, average fees per annum, class size, catchment area, student teacher ratio, number of students and others have been given prime importance. The report also covers government rules and regulation, future outlook along with SWOT analysis and analyst recommendation. Market Overview: Kuwait’s education market is in its growth stage. Changes and overhauls brought in the overall education curriculum through government interventions & subsidies extended has been a major market support parameter. The two major organizations that oversee the operations of this sector in Kuwait are the Ministry of Education and the Ministry of Higher Education. The education market in Kuwait has registered a revenue growth close to close to 6% during 2012-2017. The Ministry of Education allocated KWD 2 billion in the 2016 annual budget for Kuwait’s K-12 education sector. This is in line with its Integrated Education Reform Program (2011-2019) and the School Education Quality Improvement Project which are geared towards developing curriculum, improving learning outcomes, encouraging efficient teaching and refining the efficiency of education. Kuwait K-12 Education Market Public K-12 education is extended free of cost in Kuwait with over 800 schools serving over 350 thousand children in 2017. The government expenditure in public education has grown at a CAGR close to 7% during 2012-2016. However, the quality of education in public schools is considered to be poor and there is a growing shift towards private education. The growing demand for better quality education has resulted in more players entering the market with over 500 private schools operating in 2017. American and British schools are the most expensive, charging an average fee of close to KWD 4,000 per year, whereas Indian and Pakistani schools offer more affordable rates at an average fee of close to KWD 450 per year. The market revenue of K-12 education registered a CAGR close to 6% during 2012-2017. Currently, private K-12 schools in Kuwait provide education to over 40% of its students. The nature of the market is fragmented with various types of schools offering all types of curricula & fee range. In majority, it has been noticed that private schools are individually owned, hence leaving more room for large scale operators to take over. Major Private Schools: American (American Creative Academy, The American School of Kuwait, American United School), British (Kuwait International English School, the English Academy, New English School Kuwait) and Indian (Fahaheel Watanieh Indian Private School, Indian Educational School, United Indian School). Major Public Schools: Pironi Medium for Boys, Safia Intermediate Girls, Bints Primary Girls, Doha Elementary School for Boys, Ouzai Secondary Boys, Amama Bint Bishr. The revenues generated by the K-12 education industry in the Kuwait are projected to increase registering a five year CAGR of close to 5% during 2017-2022. Kuwait Test Preparation Market Kuwait’s test prep market is in its growth stage and has a combination of both local and international players operating in the market. The major catchment areas include Salmiya, Kuwait City, Fahaheel and Hawalli and the major players in the market include

AMIDEAST, Apachia, British Council and ILM prep. The fees for each course are paid in advance of class commencement. GMAT, GRE and SAT are the most expensive courses with each having an average fee of close to KWD 200 and the most popular course is IELTS with close to 3,000 enrollments in 2017. TOEFL and IELTS, the two English language tests together brought in majority of the revenue registering highest enrollments in the test prep market in 2017. The SAT test prep segment was the second largest followed by GMAT training classes. The smallest segment in the test prep market was the GRE. Kuwait's test preparation market is expected to expand with the increasing number of players entering the market and creating new test centers.

**Kuwait Higher Education Market** There were only 2 universities catering to higher education sector in Kuwait in 2002, Kuwait University (KU) and Public Authority of Applied Education and Training (PAAET). Currently, there are over 18 private universities in Kuwait offering a varied number of courses. The popular universities include American College of Middle East (ACM), American University of Kuwait (AUK), American University of Middle East (AUM), Gulf University for Science and Technology (GUST) and Arab Open University (AOU). [There is currently an ongoing expansion of KU that is expected to cater to nearly 40,000 students by 2019. The Kuwaiti government has also granted permits for nine new private universities with foreign affiliations to be established over the coming years.

**Kuwait Vocational Training Market** The government is trying to encourage Kuwaitis to take up vocational courses to compete with expats in the country in serving various job profiles. Public VET is provided by PAAET, Higher Institute for Theatrical Arts and Higher Institute for Music Arts, free of cost. There are some private VET institutes, generally teaching programs from 4pm-10pm regarding skills such as web designing, office management and corporate training. The majority of private VET centers are located in Kuwait City or in the Hawalli Governate.

**Kuwait E-Learning Market** Internet Penetration in Kuwait was at close to 80% in 2016, resulting in a growing market for e-learning services. There are a few technological concerns such as low internet speeds and bandwidth limitations. Security concerns are also an important barrier to the e-learning implementation. The main E-Learning companies offering content in Kuwait include Track Learning Solutions, British Council, Panacea Infotech, Global Learning and New Horizons Computer Learning Center. The future is promising due to the swift increase in the number of internet users and mobile penetration in the country along with positive feedback from the increasing use of smart classes in K-12 schools and higher use of online portals to read e-books.

**Kuwait Teacher Training Market** There are only two teacher training institutes in Kuwait, namely KU and PAAET which offer training free of cost, even to non-Kuwaitis students. These institutions are publicly owned with no private institutions offering this service in the country. The Ministry of Higher Education (MoHE) is responsible for the accreditation and regulation process of teachers in Kuwait. The steady rise of the student population and increasing competition between students acts as growth drivers in the teacher training market. However, budget cuts and rapid changes in the body of knowledge in all subjects can pose as challenges to the growth of the market.

**Kuwait Private Tutors Market** Private tuition is prohibited by the government of Kuwait, but the market still persists due to the profitability involved. Private tuition is lucrative for teachers as parents and students alike are competitive and indulge in this service to achieve higher grades. The majority of private teachers in Kuwait (70%) are located in Hawalli and Kuwait City.

Time Period Captured in the Report 2012-2017 – Historical Period 2018-2022 – Future Forecast

Key Segments Covered · Market Segmentation for Kuwait K-12 Private Education · Market Segmentation by Level of Education (Kindergarten, Primary, Intermediate, Secondary) · Market Segmentation by Gender (Male & Female) · Market Segmentation by Nationality (Kuwaiti & Non-Kuwaiti) · Market Segmentation by School Type (Foreign & Arabic) · Market Segmentation for Kuwait Test Preparation · Market Segmentation by Revenue on the Basis of Type of Test Taken (IELTS, TOEFL, GMAT, GRE, SAT) Key Target Audience · Private K-12 Schools · Government Organizations · Test Preparation Institutes · Private Vocational Training Institutes · International Schools · International Colleges/Universities · Global E-learning Companies · Investors

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