

Private Education Sector Profile

Bahrain is home to some of the oldest private educational establishments in the region, reflecting its pioneering role in developing formal education. More recently, Bahrain has been a regional leader in liberalizing the education sector to encourage private provision. Today, private institutions generate half of the total value added in education, equal in value to government education. The private education sector in Bahrain creates good job opportunities for Bahrainis and is critical in generating a supply of skilled graduates.

Private education services contributed (2.5%) towards Bahrain's real GDP in 2021 with a total Gross Value Added (GVA) of BHD 315 million. The sector GVA grew by approximately 0.5% in 2021. The private education sector employs (3%) of the total private sector workforce in Bahrain and has one of the highest Bahrainization rates in the Kingdom (30%).

Private Education Sector Activities

MOIC - ISIC4

- Pre-primary education
- Primary education
- Secondary education
- General secondary education
- Technical and vocational secondary education
- Higher education
- Other education
- Sports and recreation education
- Cultural education
- Other education
- Educational support activities

Educational Institutions

BQA, 2022

213 67

Government
Schools

Private
Schools

3 12

Government
Universities

Private
Universities

Key Market Trends

- Bahrain's growing population is increasing demand for education. The number of citizens under 20-years-old is expected to increase annually by 1.7% (around 30,000) over the next five years. With private school enrolment on the rise and investment in the segment set to soar, private education in Bahrain continues to hold enormous potential to become a significant economic growth driver, as well as a crucial support mechanism for long-term development and diversification.
- Private education is an investment that the people in Bahrain value due to a belief in access to higher education and career opportunities it provides them with. There is also a growing popularity of alternative curricula such as Montessori schools in early childhood education.
- The growth of technological capabilities in education presented a variety of media and learning-support tools to help students and promote student engagement. While hybrid programs were gaining momentum before the pandemic, there has been an explosion of digital course offerings as the pandemic further popularized the use of online learning platforms from primary to higher education.

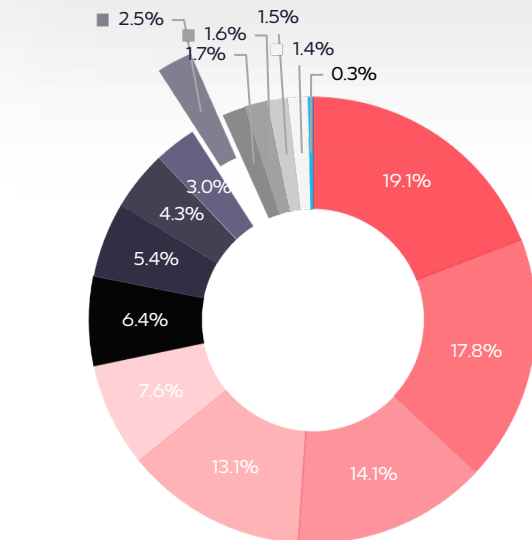
Sector Opportunities

- **Differentiation through quality:** Elevating quality in schools through differentiated excellence and schools to learn how to offer a differentiated and effective value propositions.
- **Specialized education and training:** Skills shortage in specialized fields and technical skills are in high demand in the labor market.
- **Special education:** It is vital that educational provision keeps pace with the growing population of children with special educational needs. There is also a critical teacher shortage in special education in all areas of licensure.
- **Integrated learning:** Creating opportunities for impactful and effective education by extending learning beyond the walls of a lecture room through integrated learning. Integrated learning includes work-based projects, internships, clinical placements, work simulations and mentoring programs that enhance skillsets and improve overall employability.
- **Distance learning:** There is a growing interest and demand for distance learning opportunities due to its flexibility, accessibility and cost effectiveness.
- **Early childhood education:** As the working female population in Bahrain is increasing, there is an increasing demand for early childhood education services such as nurseries and KGs.
- **EdTech:** One of the key opportunities in the private education sector is adapting to the ongoing changes in the market. The teaching methodology needs to be adapted to the current needs. So online and digital education (EdTech) is one of the opportunities as an alternative teaching method. Hybrid learning is quickly becoming a new way of life.
- **Learning analytics:** Increased focus on data-informed decision making. We have seen a renewed focus on different forms of data that are critical to enhanced education outcomes, such as real-time performance data, which allow teachers and other decisionmakers to course-adjust to the needs of learners to better support their educational journeys.

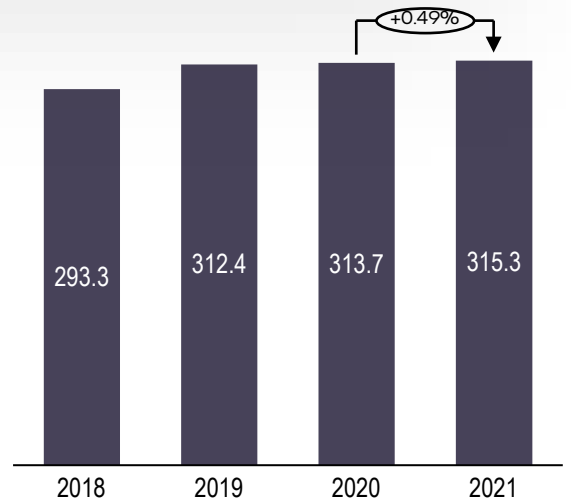
Private Education Sector Economic Indicators

iGA-National Accounts, Q4-2021

Sectors' Contribution to Real GDP (% , 2021)



Private Education Sector GVA* (BHD, M)



BHD 315 M
GVA, 2021

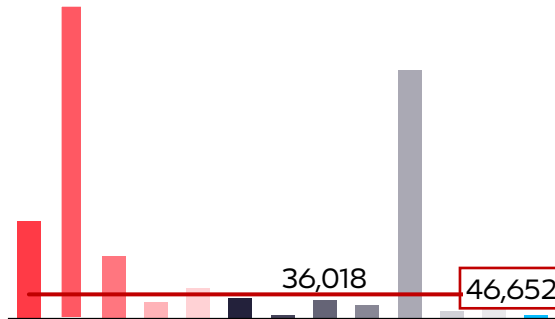


0.49%
YoY Growth in GVA, 2021



2.5%
Contribution to Real GDP, 2021

GVA per Company (BHD, Q1 2021)



- Mining & Quarrying
- Manufacturing
- Construction
- Real Estate
- Tax / Import Duties
- Other Social & Personal Services
- Accommodation and food services
- Others**
- Average GVA per company
- Financial Services
- Government Services
- Transportation & Communication
- Sale/Trading
- Private Education
- Electricity & Water
- Private Healthcare
- Agriculture

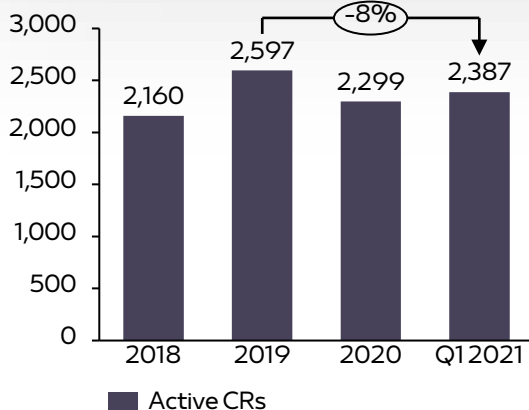
*Gross Value added (GVA) is the measure of the value of goods and services produced in an area, industry or sector of an economy

**Other includes Government Services, Private Non-Profit Institutions, Households with Employed Persons

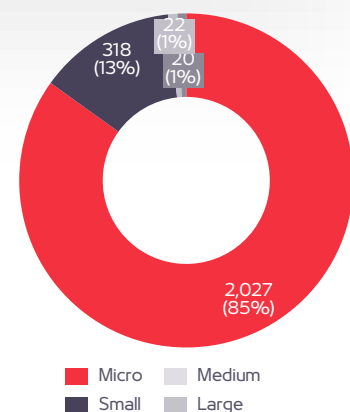
Private Education Sector Enterprises

LMRA, Q1 2021 - BLMI

Private Education Sector Active CRs (2018 - Q1 2021)



Private Education Sector by Enterprise Size (% , Q1 2021)



2,387
Active CRs

4%
of total Active CRs in Bahrain

*New entrants' information is not available

Private Education Sector Employment

LMRA, Q1 2021 – BLMI / iGA-National Accounts



12,982
Total Employees

3%
(% of Labor Market)



5,625
Total Female Employees

8%
(% Female in Labor Market)



7,357
Total Male Employees

2%
(% Male in Labor Market)



30%
Bahrainization
Ranked 7/18 Sectors



3,852
Bahraini Employees

4%
(% of Total Bahraini Employees)



9,130
Non-Bahraini Employees

2%
(% of Total Non Bahraini Employees)



BHD 629
Average Wage of Bahrainis



BHD 534
Average Wage of Non-Bahrainis



BHD 6,623
Labor Productivity
Ranked 6/13 sectors*

*13 sectors as per ISIC 3 / National Accounts, iGA



Bahraini Female Participation

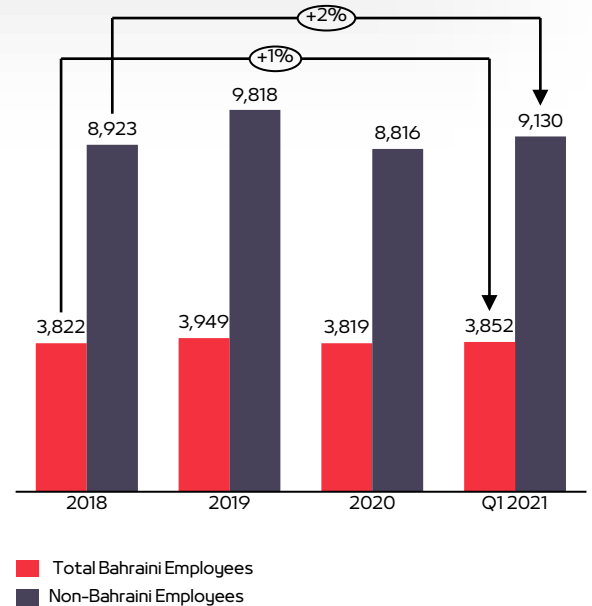
22%
(% of Labor Market)
Ranked 5/18 sectors



Bahraini Male Participation

7.4%
(% of Labor Market)
Ranked 14/18 sectors

Private Education Sector Employees by Citizenship (2018 – Q1 2021)



Private Education Sector Labor Productivity by Sector (BHD per employee, Q1 2021)

