



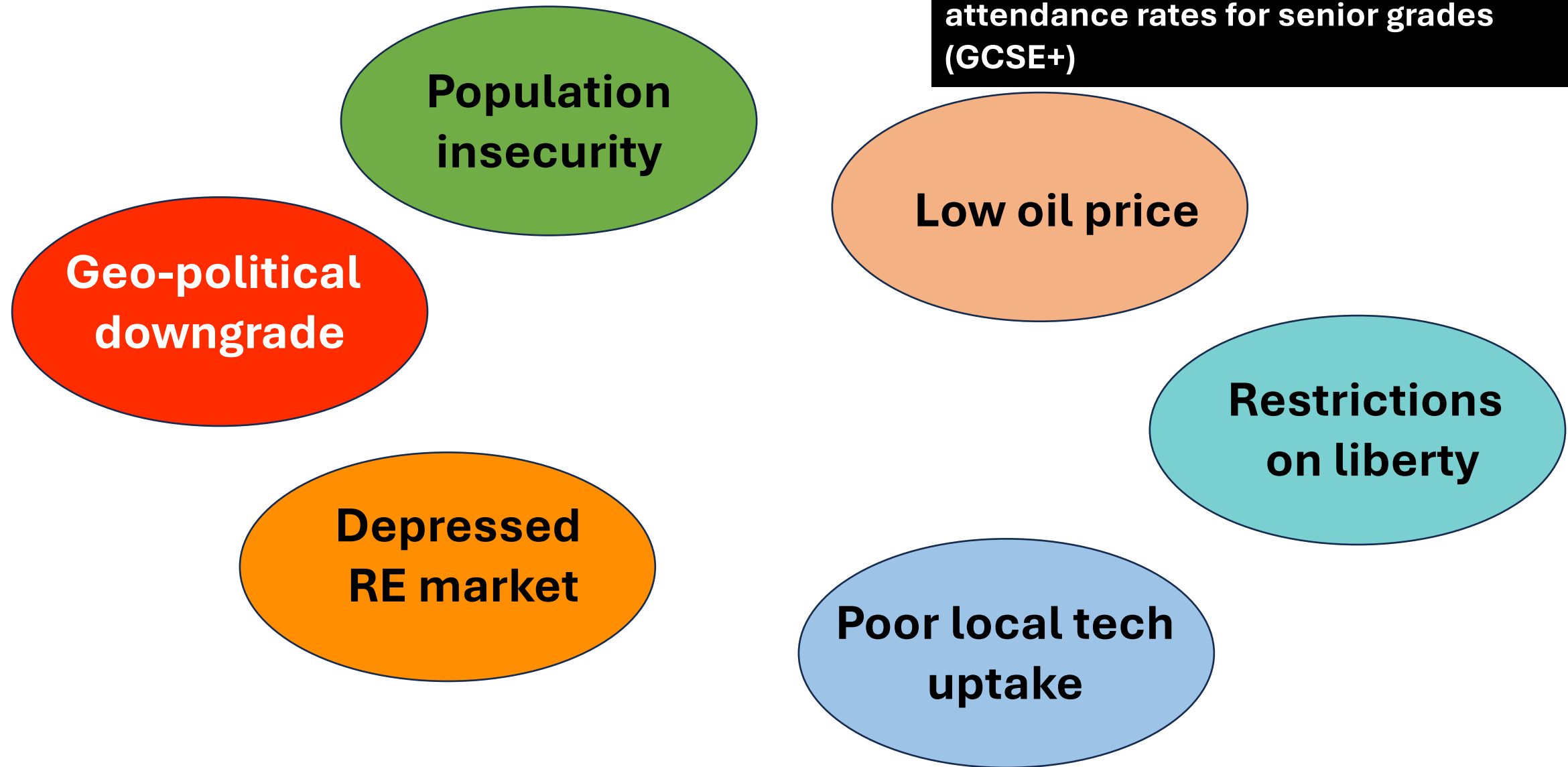
**NEW ZEALAND
TRADE & ENTERPRISE**
Te Taurapa Tūhono

ED TECH MARKET DEEP DIVE: THE MIDDLE EAST

JUNE 2024



8 years ago...





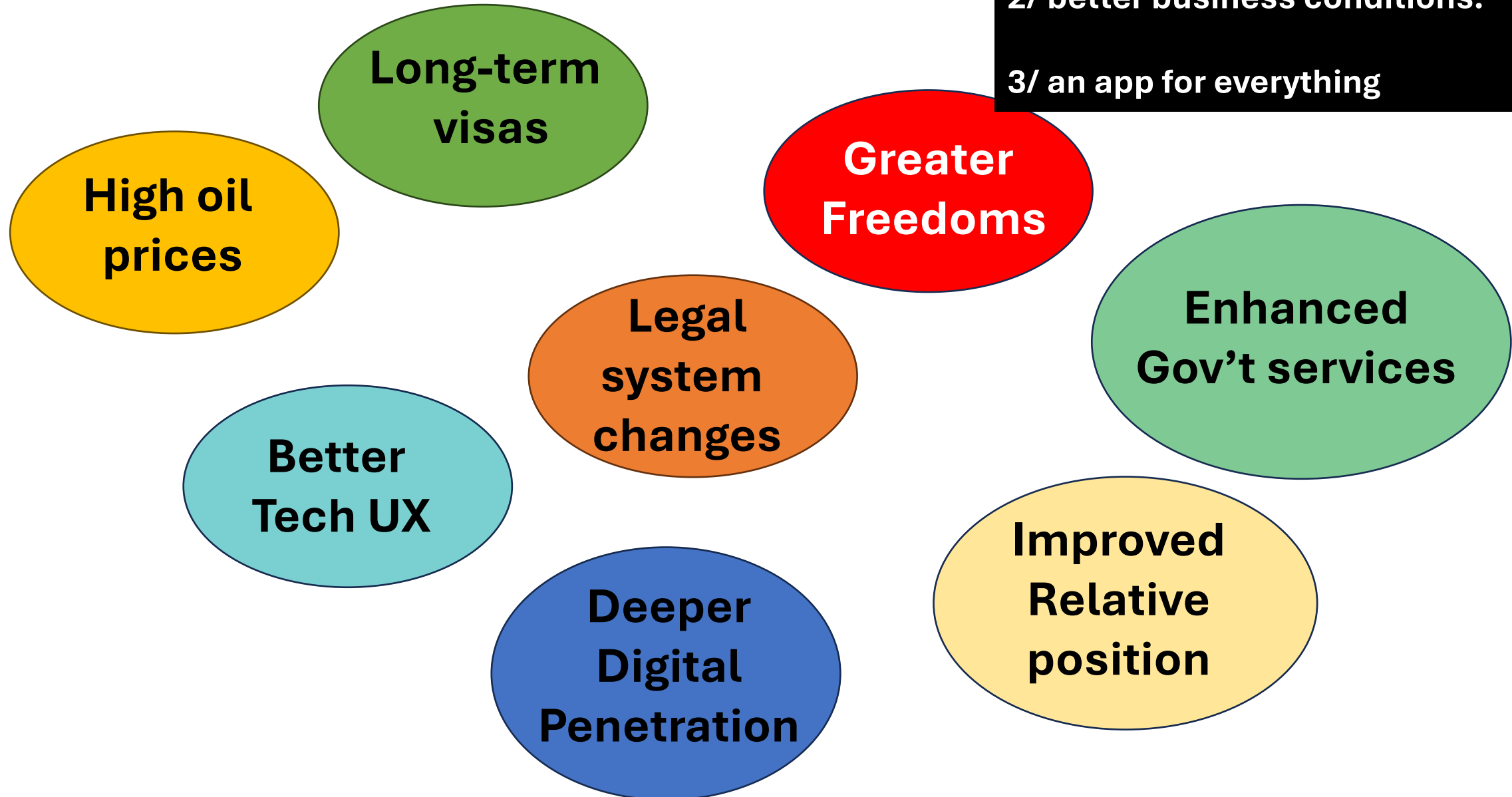
Now...

All this equals:

1/ an easier place to live, especially for families.

2/ better business conditions.

3/ an app for everything



Boom Times | The Middle East



Saudi

36 million people
GNipp = US\$60k

UAE

10 million people
GNipp = US\$88
Compact

**15% EdTech
CAGR**

**Growing, young
populations**

**Regional
competition**

**Demand for the
world's best**

K-12 sectors at a glance

Saudi

NZ\$60b spend
27,500 schools
7.1m students

UAE

NZ\$11b spend
1,300 schools
1.3m students

**KSA = 68% of
GCC school
age pop**

Analysis: Gulf ramps up schools PPP drive

Education is on the agenda for the Middle East PPP market, as the sector leads the push into social infrastructure

by Alicia Buller

CONSTRUCTION

Saudi Arabia announces 11 education sector projects under PPP programme

Projects include schools, colleges, university hospitals

Staff Writer, Zawya Projects

Demographics & Economics | Private schools

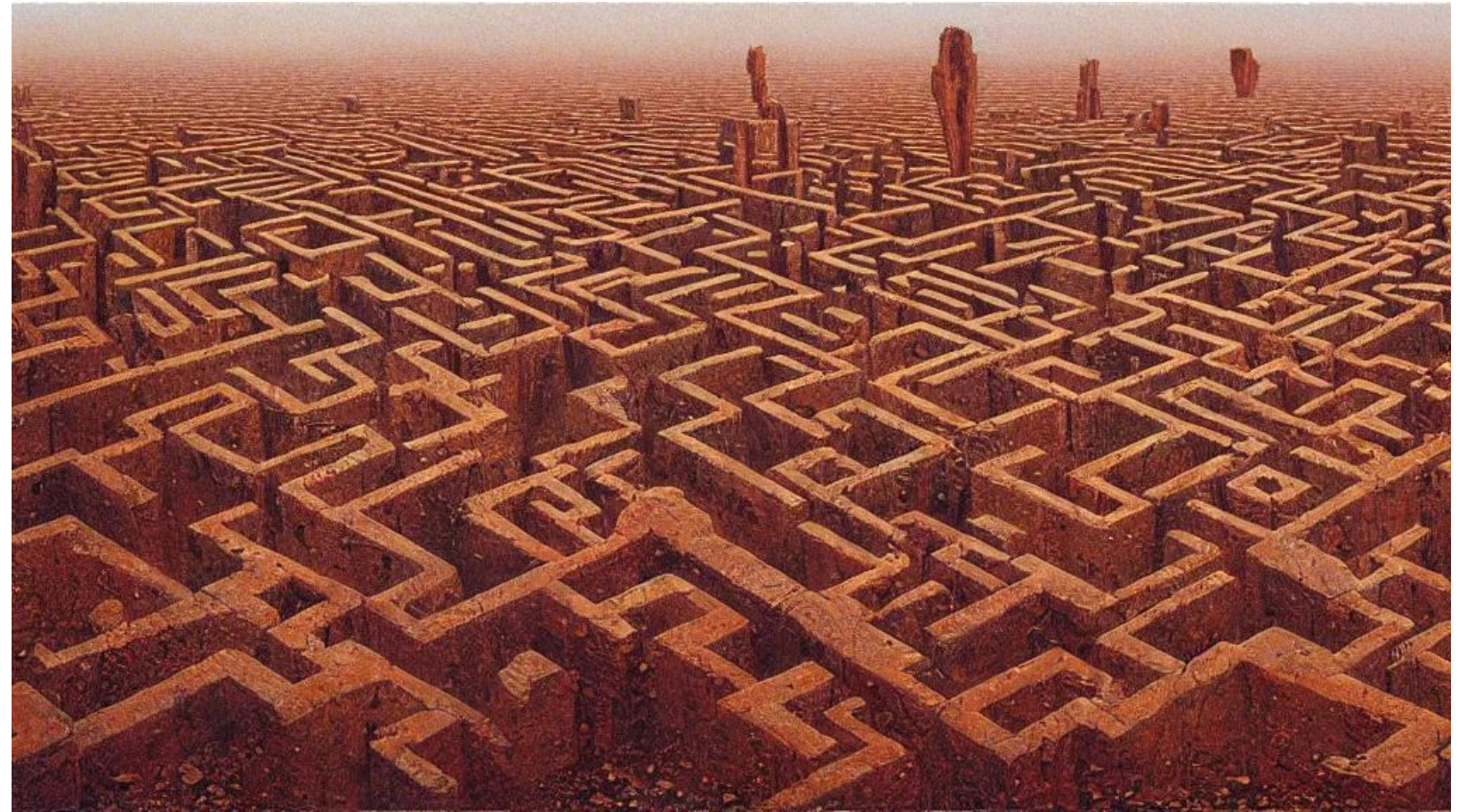
- Bigger in the UAE
 - 1m students, 600 schools, roll = 1,650 students
 - From K-12 (ages 3/4 – 17/18)
- 17 curricula
 - UK (40%), India (26%). US (14%), IB (7%)
 - Fees range from \$5.5k - \$37k
- Annual inspection and public ratings
 - Drives fees and increases

Leveraging Govt and Market Demand

- Government initiatives
 - Creating a first-rate education system
 - Economic diversification
 - Happiness agenda
- Demand for innovation
 - Digital transformation
 - E-learning platforms, virtual classrooms, AI
- Collaboration and partnerships
 - Gov't encouragement
 - Charter schools

Navigating the maze | Challenges, considerations

- Regulatory landscape
 - UAE = Federation
 - Public vs Private
- Cultural differences
- Competition



Market Entry | How to win – practical advice

- Face time
 - On the ground
 - Job titles
 - Follow up!!!
- A tailored pitch
 - Building strong partnerships
 - Avoid too much humility
 - Show \$\$\$
- Regulatory environment
 - Pragmatic approach for things that work



**Keen to know more about
the Middle East?**

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