

Education Middle East



Blending global curriculum with local values

Shannon Pipes, Principal, OWIS Riyadh discusses how the school is redefining learning in line with Saudi Arabia's Vision 2030 **PG 20**



VOL 3 ISSUE 1

September 2024

www.educationmiddleeast.com

[@EducationMiddleEast](https://www.instagram.com/EducationMiddleEast)



How Saudi's education landscape is evolving

Discussing the evolving higher education landscape in Saudi Arabia inevitably involves addressing the need to bolster human capital and bridge the skills gap between graduates and job market demands. It also highlights the urgent need to shift from an oil-dependent economy to a knowledge-based economy.

The Vision 2030 framework has been the driving force behind sweeping reforms across various sectors, and there is a greater emphasis on expanding private education and strengthening public-funded institutions both in K-12 and higher education even as effective measures are being implemented in vocational and skill-based training.

Proactive government policies, financial incentives and an increasing demand for private education have fuelled interest and investment in Saudi Arabia's education sector from both local and international stakeholders.

The K-12 segment in Saudi Arabia – the largest in the region – will continue to dominate both in terms of investment and revenue. With the largest student population in the GCC region, the market presents substantial potential for expansion.

Saudi Arabia's higher education sector too continues to evolve, with many international universities trying to make an entry. By 2030, the sector is set to accommodate around 2.82 million seats, with 150,000 in private institutions and 2.7 million in public ones.

Technology adoption in the education sector in Saudi Arabia is fast evolving with extensive use of interactive

whiteboards, digital textbooks and e-learning platforms, enriching the traditional classroom experience. The Kingdom is laying special emphasis on integrating AI and STEM.

Initiatives are ongoing to leverage AI to address pressing educational challenges and revolutionise teaching and learning methodologies. The demand is expected to shift towards evidence-based R&D studies rather than traditional fields of study to overcome the mismatch between what's learnt and the skills and requirements of the employment market.

Several education-related Public-Private Partnership (PPP) initiatives have been launched by the

government mostly on the Design-Build-Finance-Operate-Maintain-Transfer (DBFOMT) model.

Meanwhile, challenges continue to prevail, especially in attracting and retaining qualified teachers even as schools in the country are turning to higher salaries and advanced recruitment strategies to address the shortage. While urban centres such as Riyadh and Jeddah continue to dominate in terms of new private international schools and investments, there is a need to distribute the gains of these reforms across the country.

Joseph George
Editor



Editor
Joseph George
editor@educationmiddleeast.com

Editorial Team
Ritika, Susmitha Nachiket, Amitha R

Design & Layout
Vahiju P C

Advertising
Mathew, Cecelia M
info@educationmiddleeast.com
T: +971 58 5277050/+971 54 3916932

Published by:
Edu Middle East LLC
License No 2113278.01

COPYRIGHT: All material appearing in Education Middle East is copyright unless otherwise stated or it may rest with the provider of the supplied material. Nothing may be reproduced in whole or in part without the written permission from the publisher. Education Middle East takes all care to ensure information is correct at time of publishing but the publisher accepts no responsibility or liability for the accuracy of any information contained in the text or advertisements. Points of view expressed may not necessarily represent those of Education Middle East.

CONTENTS



INVESTMENT

Investors galore

Proactive policies and incentives drive local and global investment in Saudi education

K-12 MARKET OUTLOOK

Saudi K-12 sector to hit \$22.2 billion by 2028

Student enrollment is expected to increase to around 7.2 million by 2030

TEACHER RECRUITMENT

Attracting top talent

Schools in the country are turning to higher salaries and advanced recruitment strategies to attract and retain qualified teachers

CAMPUS OVERVIEW

Bringing 427 years of British excellence to the heart of Saudi

Aldenham Prep School Riyadh offers a British education tailored to Saudi, focusing on student growth and global readiness

INTERVIEW

Where high-quality education meets high-profit outcomes

Shahram Hashemi & Alec H. Nejad, Co-Founders & Managing Partners, Aldenham Education Group discuss strategies to achieve high-quality education with strong financial returns

INTERVIEW

Blending global curriculum with local values

Shannon Pipes, Principal, OWIS Riyadh discusses how the school is redefining learning in line with Saudi Arabia's Vision 2030

TECHNOLOGY

Pioneer of new technologies

Saudi Arabia embraces AI and STEM to innovate education and prepare students to lead the global workforce



HIGHER EDUCATION

Vision 2030 fuels growth in Saudi higher education

The country's higher education sector continues to evolve, with many international universities trying to make an entry

Investors galore

Proactive government policies, financial incentives and an increasing demand for private education have fuelled interest and investment in Saudi Arabia's education sector from both local and international stakeholders. Foreign direct investment (FDI) rose by 12.1% in 2023, while government funding increased to SAR 189 billion

By **Joseph George**

Saudi Arabia is witnessing a notable increase in investments in the education sector. Both regional and international brands are setting shop in the Kingdom, anticipating a rising demand driven by several factors: a growing interest in private education, an expanding focus on early childhood education, a population willing to pay a premium for prestigious schools, and, most importantly, proactive government policies. These policies are introducing significant reforms and allocating additional funds to

promote the growth of the education sector in the country.

The Saudi Government's Vision 2030 framework has been the driving force behind sweeping reforms across various economic, business, and service sectors. Education, in particular, has emerged as a central focus, receiving substantial budget allocations and undergoing significant policy changes.

Historically, Saudi nationals were barred from attending private international schools. However, the reversal of this policy over the years

has increased the student demand for international schools, encouraging investment in the sector. From being a provider of education, the government is repositioning itself towards being more of a regulator, opening up opportunities for private investment in the education sector.

Faouzi Hammouchi, Senior Manager, Emkan Education says Vision 2030 and its Vision Realisation Programme 'Human Capital Development' have led to the launch of numerous initiatives by both public and private sectors. These initiatives focus on matching educational outcomes with the



Saudi Arabia's push for education reforms is guided by national priorities to ensure access for all and elevate quality standards

needs of the labour market, fostering innovation, and developing and upgrading skills.

“Based on the national priorities to provide education for all and to improve the overall quality of education in the Kingdom, privatisation initiatives are launched in Saudi’s education sector to enable growth,” he says.

Hammouchi says there is a gradual shift from public schools to private schools and from local private branded schools to international branded schools.

According to him, there is a gradual transition from public to private schools, as well as a shift from local private brands to internationally recognised brands. “Mostly American curriculum is followed in schools in Saudi. However, demand for the IB and British curriculum is expected to grow,” says Hammouchi adding that the demand for Special Education Needs (SEN) schools and Early Childhood Education (ECE) Centres across the Kingdom has also been increasing.

“Despite the current high spending levels on teachers, Saudi needs to improve both its teacher professional development coverage and overall access to quality education to eliminate the existing gap in student attainment,” says Hammouchi.

Ivor McGettigan, Partner - Employment, Al Tamimi & Company says that whether it’s the market opening to international operators in 2017, a more benign regulatory environment, or incentives from various government authorities, government initiatives have had a significant impact. “We expect further positive regulatory developments as the educational sector is a key pillar of the recent reforms,” he adds.

Saudi also witnessed one of the highest investments into start-ups in MENA, especially in EdTech, where the e-learning market size reached US\$2.1 Billion in 2023. “It’s an indication of growing interest in educational innovation and technology in the Kingdom,” says Salman Khan, Senior Manager - Strategy & Consulting, Education, Knight Frank, MEA.

Today, three of the top 10 most-funded EdTech startups in the Middle East and North Africa region are from the Kingdom, and investment is concentrated in the Kingdom’s biggest cities: Riyadh, Jeddah, Mecca, Medina and Dammam.

Growing investments

According to recent statistics released by the Ministry of Investment,



This [Super License] has encouraged several schools including Kings College, Aldenham Prep School, One World International School, Reigate Grammar School and SEK International to set up shop in Riyadh. A few more schools are expected to join the programme in the future.

— **Salman Khan,**
Senior Manager - Strategy & Consulting,
Education, Knight Frank, MEA

the total value of foreign direct investment (FDI) in the education sector saw significant growth, with a notable increase of 12.1% in 2023 compared to 2022. The total FDI into the education sector was about 917 million riyals in 2022.

In the second quarter of 2024 the Ministry of Investment issued 41 investment licenses in the education sector, marking an 86% increase compared to the same period in the previous year. In 2023 a total of 112 investment licenses were issued, reflecting a 49% growth from 2022.

The Invest Saudi platform is currently showcasing more than 70 investment opportunities in education. Most of the investments have been towards K-12 (22), followed by training (17), early education (17), higher education (11) and edtech (4).

Meanwhile, government investments in education have also been on the rise and are among the highest in value compared to other GCC countries and high-income nations. In 2022, Saudi Arabia allocated SAR185 billion (about \$49.3 billion) to education, a figure that rose to SAR 189 billion (about \$50.4 billion) in 2023.

In an effort to attract quality investments into education, Saudi



Arabia has been providing a number of financial incentives and regulatory exemptions, the most notable among them being supporting capital expenditure for land and buildings, or supporting land leasing to compensate for the high costs of real estate in the Kingdom for private sector operators, or supporting teachers’ salaries by providing financial aid, especially to foreign teaching staff members with high qualifications and high salaries.

Among the regulatory exemptions are accelerating visa approval for foreign employees, exempting international schools from Saudization, reducing



Lifting outdated policies such as gender segregation in primary grades has broadened the student base in Saudi schools

the percentage of Saudization in Saudi schools and modifying the mandatory gender segregation stage from the grade three to grade six in schools, which will contribute to reducing capital and recruitment costs.

Khan says these and other incentives such as the 'Super License' offered by the Royal Commission for Riyadh City (RCRC) as part of their International Schools Attraction Programme have enabled easier market access, lowered regulatory requirements and offered sites to government-awarded schools. "This has encouraged several schools including Kings College, Aldenham Prep

School, One World International School, Reigate Grammar School and SEK International to set up shop in Riyadh. A few more schools are expected to join the programme in the future," he says.

The development of giga-projects is another significant factor contributing to the growth of the education sector in Saudi Arabia, demanding the establishment of high-quality educational institutions to cater to the expanding expatriate workforce.

Public-Private Partnership

Meanwhile, funds are also being allocated by the government to the

development and upgradation of public sector education infrastructure.

According to Khan, several education-related Public-Private Partnership (PPP) initiatives have been launched by the government in the past couple of years. The predominant procurement model in all the PPP models appears to be Design-Build-Finance-Operate-Maintain-Transfer (DBFOMT).

Among the major PPP projects include the 180 educational buildings across the Kingdom; development of educational facilities and

infrastructure for King Abdulaziz University in Rabigh; privatisation of the operations and maintenance of six vocational and technical centres of excellence across various cities in the Kingdom; development of Special Education Needs (SEN) and boarding schools in Riyadh, Jeddah and Aseer; development of five university hospitals (higher education) in Dammam, Jazan, Makkah, Tabuk and Abha; and more than 2,609 residential units in Abha for accommodation for King Khalid University's faculty staff.

"Since all projects are in the early stages of planning and development, the effectiveness of these models are yet to be evaluated," says Khan.

Key considerations

As investors explore these opportunities, several key factors emerge as crucial considerations for those eyeing the education sector where land availability, development costs, capital expenditures, site selection and affordability concerns are pivotal.

Experts note that while affordable schools with standard tuition fees are generally preferred, there is also a significant segment of the population in major cities that can afford premium schools, where tuition fees range between \$15,000 and \$20,000.

Khan suggests that pricing strategies should be closely linked to overall market demand and more specifically



Whether it's the market opening to international operators in 2017, a more benign regulatory environment, or incentives from various government authorities, government initiatives have had a significant impact.

— Ivor McGettigan,
Partner - Employment, Al Tamimi & Company

to socio-economic profile of the catchment area.

The demand for higher education, particularly in technical and vocational training, is also picking

up due to the enforcement of Saudisation laws in different sectors.

"The government is set to apply a cap of 60% on the number of high school graduates attending universities, with the remaining 40% of students being redirected into the technical and vocational education sector further fueling demand," adds Khan.

Policies driving investment

Several government initiatives and reforms in Saudi Arabia have significantly impacted the education sector, sparking interest and investment from both local and international players. Khan highlights policies such as the introduction of a 100% foreign ownership law, which permits schools to be entirely owned by foreign education providers, as a major driver in drawing the attention of international operators and investors looking to invest in Saudi Arabia's education sector.

Other initiatives include the establishment of the National Centre for Privatisation, which aims to reduce dependence on the public sector and enhance learning outcomes and the establishment of MISA, a dedicated desk for the education sector as a one-stop-shop for commercial licensing and as the main point of liaison for operators/investors.

According to research by Knight Frank, \$7 billion has been allocated for schools, higher education and other education facilities as part of Saudi Arabia's National Transformation Programme - all due to be completed by 2030.

Khan highlights that the Saudi Government's Regional Headquarters (RHQ) Programme, which came into effect in 2023, mandating foreign firms in Saudi to establish local headquarters within the country to increase the inflow of expatriates has further enhanced the demand for international schools in Riyadh. Additionally, the Royal Commission for Riyadh City's 'Super License' programme, which offers easier market access, reduced regulatory requirements and government-provided school sites, is attracting many international schools to set up their branches in Riyadh.

Reversal of outdated policies such as allowing Saudi nationals to attend private international schools and lifting gender segregation for primary cycles has also increased the student base and financial viability of schools. "Exemption for international schools from Saudisation quotas applicable to teaching staff also indicates the government's intent to facilitate international education providers in operating within the Kingdom," adds Khan.



The demand for higher education, particularly in technical and vocational training, is picking up due to the enforcement of Saudisation laws in different sectors



Despite the current high spending levels on teachers, Saudi needs to improve both its teacher professional development coverage and overall access to quality education to eliminate the existing gap in student attainment.

— **Faouzi Hammouchi**,
Senior Manager, Emkan Education

Deterrent policies

However, there are certain policies that may deter growth in the sector. According to Khan, the introduction of Expat Dependent Fees in 2017 has deterred investment and reduced the expatriate population in the country.

Khan says, “These are fees for each dependent living in the Kingdom of expat workers, which rose incrementally until reaching SAR400 per dependent per month in 2020. After these were introduced 800,000 expats left the country between Q1 2016 and the end of 2017, reducing the expat population from 8.5 million to 7.7 million.”

High land costs and stringent infrastructure requirements, such as the minimum land requirement of 40,000 square metres for higher education institutions, may deter private investors. As per Khan, the requirement for investors to provide a bank guarantee of SAR 5,000 per student for potential transfer costs in case of university closure is likely to be a concern for higher education investors and operators.

“Recent years, marked by heightened economic activity and a surge in land development, have catalysed an upward trajectory in construction and land prices. High land costs restrict the provision. In this heated environment, investor enthusiasm for new developments is poised at a



Exempting international schools from Saudisation quotas for teaching staff demonstrates the government’s commitment to supporting international education providers in the country

crossroads, navigating the delicate balance between opportunity and caution,” says Khan.

Another factor that could affect private investment into education is the high development and capital cost. “High development costs may render school projects to be unviable, the scope to pass the cost burden onto consumers/parents is limited in an education setting,” says Khan.

According to him, minimum infrastructure requirements and gender segregation must also be looked into. “International education institutions need to be segregated beyond primary school,” he adds.

Before investing, Hammouchi urges investors and the management to follow some key fundamental steps such as conducting in-depth market research, gathering parents’ preferences, connecting with key stakeholders in Saudi’s educational ecosystem to discuss potential collaboration areas and identifying and applying for relevant school incentive programmes. “Collaboration and/or strategic partnership right at the designing phase of a project with a local school operator, investor or educational entity to provide local educational market data and considerations, and to navigate through Saudi’s educational landscape is crucial,” he adds. ■



The K-12 segment in Saudi Arabia is expected to continue to dominate the region both in terms of investment and revenue

Saudi Arabia's K-12 education sector set to reach \$22.2 million by 2028

Student enrollment is expected to increase to around 7.2 million by 2030

By **Ritika**

K-12 education in Saudi Arabia has emerged as the fastest growing segment within the education sector, driven by the Kingdom's ongoing rapid reforms.

The Vision 2030 reform plan, launched in 2016, is driven by the need for diversifying the Kingdom's economy from its dependence on oil and creating a workforce, capable of competing successfully in a global environment. Reforms within the education sector are aimed at enhancing quality and standards,

improving infrastructure, updating curricula and integrating technology.

Dominant force

The K-12 segment in Saudi Arabia will continue to dominate the region both in terms of investment and revenue. With the largest student population in the GCC region, the market presents substantial potential for expansion.

Mansoor Ahmed, Executive Director, Advisory & Valuation, Colliers MENA says Saudi has the largest K-12 enrollment followed by UAE (1.4m in 2022) and Oman (0.84m in 2022). Saudi also has the largest population

base share of 58% in the GCC market, with a favourable demographics and a growing population base.

Krishna Dhanak, Managing Director, Alpen Capital says Saudi Arabia, owing to its expansive population base has the largest addressable market for the education sector in the region and accounted for 68.6% of the total GCC student enrollments as of 2021. However, according to him, the Kingdom's rate of growth in total enrollments has been below the GCC average of 1.1% between 2016-2021.

Moreover, there is a tremendous scope

for expansion, especially for private education. Of a total 35,400 K-12 schools, 79% are in the public sector while only 21% are private, offering ample growth opportunities in the private sector.

As per latest available figures, between 2018 and 2022 there was a 24.4% increase in the number of private schools offering international education and a 46.2% increase in Saudi Arabia's private schools licensed by the Royal Commission for Riyadh City (RCRC).

According to data made available by Mordor Intelligence, the Saudi K-12 private education market was valued at \$9.6 million in 2022 and is expected to reach a value of \$22.2 million by 2028, registering a CAGR of 14.9% during the period.

Rahul Sharma, Lead Research Analyst - Education, Mordor Intelligence says, despite being the largest market in the Gulf region, Saudi Arabia has the lowest proportion of students enrolled in private schools. "Only 15% of Saudi students attended private schools," he says.

In 2022 approximately 6 million students were enrolled in K-12 education in Saudi Arabia out of 9.6 million across the Gulf Cooperation Council (GCC). As the population of the country continues to grow, industry experts anticipate that by 2030 there will be a need for 7.2 million K-12 school places. "Of these additional 1.2 million places, it is expected that 400,000 will be in the private sector," says Sharma.



Like other GCC countries, Saudi Arabia faces significant challenges in attracting and retaining quality staff

Impact of Vision 2030

To meet the rising demand for education, the Saudi government has increased its focus on expanding infrastructure, primarily through private sector participation. "The government has also introduced several reforms in the sector as part of its Vision 2030 economic diversification strategy to build a knowledge-based economy," says Krishna Dhanak, Managing Director, Alpen Capital, a financial advisory company.

Saudi Arabia's education sector has improved in global rankings, from 74th to 56th position in average years of schooling index. In line with the Vision 2030 programme, the government has focused on developing regulations and policies for kindergartens to empower staff, ensuring they understand their duties and responsibilities and perform their roles with confidence.

New academic institutions have been established, curricula revised and teacher training initiatives implemented. "The government is placing a strong emphasis on human capital by launching a dedicated Human Capital Development Programme (HCDP) as part of the Vision 2030 realisation programme," says Ahmed.

According to Sharma, the HCDP has set several challenging objectives such as increasing the proportion of children enrolled in early learning to 40% by 2025.

Sharma also points out that various factors have impeded the progress, including notable variations in quality across different regions, a gender



Saudi has the largest K-12 enrollment followed by UAE (1.4m in 2022) and Oman (0.84m in 2022).

— **Mansoor Ahmed**,
Executive Director, Advisory & Valuation,
Colliers MENA



School fees have increased significantly in Saudi Arabia as the private sector continues to adopt American and British curriculums.

— **Krishna Dhanak**,
Managing Director, Alpen Capital

disparity in skill levels that exceeds the national average and inadequate investment in teaching resources.

Growing markets

While major cities such as Riyadh, Jeddah and Dammam/Al Khobar continue to attract the focus of educational operators and investors, second-tier cities such as Makkah, Madinah, Al Ahsa, Abha and Taif are emerging as untapped opportunities for private school development. "These cities, undergoing significant expansion as part of Vision 2030 initiatives, present favourable conditions for establishing new educational institutions, given the projected

K-12 MARKET OUTLOOK

increase in per capita income and population growth,” says Ahmed.

However, tuition fees for private schools in second-tier cities continues to remain below \$10,000 per annum, whereas fees in main cities such as Riyadh range from \$10,000 to \$30,000 per annum for high-quality local and international schools. Fees charged by international schools offering British, American and IB curricula are the highest while the tuition fee for private schools offering Indian and Arabic curriculum is relatively lower “School fees have increased significantly in Saudi Arabia as the private sector continues to adopt American and British curriculums,” says Dhanak.


The growing number of international branded schools in cities such as Riyadh has driven the average fee upwards. Today the average fee for international private schools is anywhere between \$15,000 to \$20,000 per annum.

In terms of curriculum, Arabic remains the most widely adopted, followed by the American curriculum. However, demand for the British curriculum is expected to rise as more white-collar expatriates, particularly in Riyadh, move into the country

Public vs private schools

According to Ahmed, there is a gradual shift towards private schools and from local private branded schools to international branded schools.

Curriculum updates, teacher training programmes and introduction of modern teaching methods and



The average expenditure for constructing a school accommodating 1,800 - 2,000 students may range from SAR235 million to SAR340 million.

— **Rahul Sharma**,
Lead Research Analyst - Education,
Mordor Intelligence

technologies are among the various other initiatives which have been introduced by the government.

In addition, the government is also promoting the integration of technology in public sector schools through initiatives such as the ‘Madrasati’ programme. “The aim is to provide digital resources, online learning platforms and connectivity to enhance teaching and learning experiences,” adds Ahmed.

“In 2021, the government introduced

the Flexible Learning Pathways Initiative aimed at enhancing professional competencies in K-12 education, along with higher education and professional development in collaboration with international platforms,” highlights Sharma.

The government has also invested in e-learning. According to Sharma, nine million students are benefiting from distance learning platforms and 300,000 children are taking advantage of virtual kindergartens.

Emerging hurdles

Securing qualified teaching staff, increased land prices and increased cost of staff are some of the main challenges faced by operators in K-12 in Saudi Arabia.

“Increased economic activity and a boom in land development have spurred a rise in construction and land prices. The high cost of land has dampened investor confidence in initiating new developments,” says Sharma.

According to him, the average expenditure for constructing a school accommodating 1,800 - 2,000 students may range from SAR235 million (\$62.57 million) to SAR340 million (\$90.54 million). “An approach to mitigate these excessive costs involves leasing the land,” he adds.

According to Dhanak, following the economic slowdown caused by the pandemic and lower oil prices, the government has implemented several austerity measures, including subsidy cuts and the introduction of a tax regime. “This has resulted in increased cost of setting up and managing schools, one of the major challenges faced by the K-12 operators,” says Dhanak.

To address these challenges, operators are advocating for a reduction in governmental fees for the education sector. This includes easing administrative costs such as visa fees for teachers and fee adjusted rents (i.e. lower rents for lower fee charging schools) and preferential costs of utilities for educational institutions. Additionally, operators are managing the rising cost of staff even as they compete to attract and retain top talent from a limited pool of teachers.

“The success of a school is profoundly dependent on the quality of teaching staff available on campus. Similar to other countries in the GCC, attracting and retaining quality staff is a major challenge in Saudi,” says Ahmed.

Many schools are offering generous compensation packages, professional development opportunities and flexibility at work to mitigate the challenge. ■



Saudi Arabia's education sector has risen in global rankings, improving from 74th to 56th in the average years of schooling index



The Saudi government is increasingly focused on boosting private sector participation to improve the quality of education

Competitive salaries, early recruitment to attract top talent

As Saudi Arabia faces increasing challenges in attracting and retaining qualified teachers, schools in the country are turning to higher salaries and advanced recruitment strategies to address the shortage

By **Ritika**

Schools worldwide are experiencing a significant shortage of skilled teachers, and Saudi Arabia has now emerged as one of the latest countries to be grappling with this challenge.

While the shortage is less pronounced in public schools, a growing number of private institutions, particularly international schools, are facing the heat.

Saudi Arabia currently has more than 500,000 teachers working in 30,000

plus schools, including public, private and international schools. These numbers are only expected to grow in the coming decade due to major initiatives and a heightened focus on educational reforms as part of the Vision 2030 policy. The Kingdom is set to see investments of more than

SR12.4 trillion (about \$3.31 trillion) into its overall economy under the Vision 2030 framework.

The Saudi government is increasingly focused on boosting private sector participation to improve the quality of education, aiming to transition from a provider to a regulatory role. This has had its impact as private investors are showing a keen interest in the Saudi education market, with more international schools opening branches in major cities. According to a report by real estate consultancy Knight Frank, while private schools offering international curricula grew by about 24.4% between 2018 and 2022, private schools licensed by the Royal Commissions increased by 46.2% during the same period. Knight Frank also estimates that there could be at least 214,000 additional private school seats by 2035, which it describes as a “mere conservative estimate” based on organic population growth.

Rising demand

“Considering the growing demand for K-12 schools to support the growing population in the Kingdom, the demand for skilled teaching staff is certainly expected to increase to support this expansion,” says Salman Khan, Senior Manager - Strategy & Consulting, Education, MEA, Knight Frank.

This demand, according to Khan, is



A lack of mobility and the presence of mature private school markets in proximity indicate that Saudi Arabia likely finds it difficult to retain teachers, especially those from abroad.

— **Salman Khan,**
Senior Manager - Strategy & Consulting,
Education, MEA, Knight Frank

already evident in Riyadh, where an increasing number of international schools have commenced operations, with many more in the planning stages or preparing to enter the market.

However, he cautions that while there is no immediate shortage of teachers, the situation could change. “It appears that Saudi does not have an overall shortage of teachers. However, there are gaps in certain areas, some of which include STEM subjects. Saudi competes with other GCC markets,

few of which are viewed as superior destinations to work, considering education systems are more mature, environment more liberal and quality of life better,” says Khan.

Diane Jacoutot, Managing Director at Edvectus, an international teacher recruitment firm describes the international education sector in Saudi Arabia as “vibrant”, with new schools opening and existing schools expanding. She notes that Saudi schools are experiencing the same lack of supply from key source countries such as the US, UK and Australia, as neighbouring GCC countries are experiencing.

“There are serious teacher shortages in the US, UK, Canada and Australia, which are impacting all schools, everywhere. Right now, 35% of our current teaching vacancies in the MENA region are in Saudi compared to only 8% at the same time last year,” says Jacoutot.

There is also a fast-growing demand from Saudi schools for teachers specialising in STEM – Science, Technology, Engineering and Mathematics. “Teachers who graduate in these subjects are often snapped up by well-paying jobs in industry,” she says.

Roddy Hammond, CEO & Founder, Worldteachers Recruitment Ltd says that while the availability of teachers in Saudi schools is currently manageable, this is expected to change significantly next year with the opening of several new schools. “So it is expected to become pretty tricky from next year onwards,” he adds.

Teacher shortage

According to Jacoutot, Saudi Arabia is also facing a shortage of Western trained, English-speaking teachers from the US, UK, Canada and Australia – all key source countries for international schools using those curricula. “The shortage is especially acute at upper secondary level, and especially those with experience teaching IGCSE, A level, IB Diploma or US Advanced Placement levels,” says Jacoutot, adding that this is not a problem specific to Saudi. “It’s everywhere. But it hits Saudi harder than some other countries because it’s not seen as a top destination for most Western expatriates yet. But this is changing,” she adds.

As Hammond notes, there could be a high demand for teachers in specific subjects. “As there are not enough Secondary/High school teachers being trained globally, subjects like Maths, Science and Computer Studies are expected to become more difficult, exactly the same as other countries in the region,” he adds.



Attractive salaries are fuelling a growing interest among teachers to work in Saudi Arabia

Meanwhile the ability of schools to retain teachers remains low at present. “A lack of mobility and the presence of mature private school markets in proximity indicate that Saudi Arabia likely finds it difficult to retain teachers, especially those from abroad,” says Khan.

According to him, in certain instances, schools also compete with higher education sector for skilled staff for Science- and Mathematics-related subjects. “Operators cite difficulties in matching the remuneration packages offered by the higher education institutions,” he adds.

Furthermore, Saudi Arabia also competes with other GCC countries, especially destinations such as UAE and Qatar, which are considered superior in terms of quality of life and accessibility.

Attractive incentives

International schools in Saudi Arabia are reportedly having to offer premium salaries to attract and retain qualified teachers. More specifically, schools cite greater difficulty in retaining qualified female teachers for STEM subjects. “Many of these teachers are under the sponsorship of their spouses and often have to leave teaching roles in the event their spouse’s employment ceases, repatriation, relocation, etc,” adds Khan.

In a related development, Saudi Arabia recently introduced a new rule allowing expatriates over 18 years old living on their spouse’s visa to work in the education sector without transferring their visas. While this rule does not directly address the retention issues for female teachers, it represents a broader effort to improve workforce flexibility.

Meanwhile, a 2023 survey of more than 500 teachers conducted by Edvectus revealed that for Western teachers, financial benefit was the biggest consideration when choosing a new job. According to Jacoutot, though salaries in Saudi are comparable to or better than the neighbouring UAE and the cost of living considerably lower, the country is still not as popular among international recruits. “So we always tell our teachers that if they are reading articles or information about Saudi that’s more than five years old, they should throw them away!” she says.

“More Saudi schools are welcoming to teachers with dependent children, so we are doing our best to spread the word that Saudi is a place to consider. We think it’s a fabulous teaching destination for teachers who want to



There is a fast-growing demand from Saudi schools for teachers specialising in STEM - Science, Technology, Engineering and Mathematics

save money,” says Jacoutot. According to her many schools in Saudi are proactively looking at their salaries to make sure the packages are attractive because “money talks” for teachers who are in demand.

Hammond notes that an increasing interest from teachers about living and working in Saudi Arabia are due to better salaries. “More teachers are putting Saudi Arabia as one of their preferred options. It is currently in a well-balanced position as there is good demand from schools with different opportunities for teachers,” he says.

Schools meanwhile have also adopted various mechanisms to mitigate the shortage. According to Hammond, having good marketing information to promote the school is very effective in attracting applications.

“There is a more positive use of experienced recruitment agents who work with Saudi schools on a closer partnership basis rather than relying solely on direct applications,” says Hammond, adding that agents are



The [teacher] shortage is especially acute at upper secondary level, and especially those with experience teaching IGCSE, A level, IB Diploma or US Advanced Placement levels.

— Diane Jacoutot,
Managing Director, Edvectus

TEACHER RECRUITMENT



Saudi Arabia currently has more than 500,000 teachers working in 30,000 plus schools, including public, private and international schools

able to promote the opportunities in Saudi in a very positive way to teachers who may not have originally applied to work in the country.

Unlike schools in the UAE, there is less of an internal market. This, Hammond says, will evolve as more international schools open up. "We also expect to see a strong interest in a return to specialist recruitment fairs in the year ahead," he adds.

Teacher upskilling

To upskill teachers, the Saudi government has implemented initiatives such as the National Institute for Professional Education and Development (NIPED) and the Khbrat Programme under Vision 2030. These programmes focus on improving teacher training, offering scholarships, and providing international learning experiences for Saudi teachers to bridge skill gaps.

According to Khan, NIPED enrolled more than 55,000 teachers in its first year while Khbrat Programme aimed to enroll 25,000 participants in five

years, with more than 80% visiting the United States.

Additionally, there is the Education and Training Evaluation Commission (ETEC), which develops the Teachers Standards and Professional Pathways. These standards involve a performance-based evaluation of teaching staff, including classroom observations, lesson plan review, and portfolio creation.

Meanwhile, schools are taking a proactive approach by starting their recruitment efforts ahead of time. Because of the worldwide mismatch of supply and demand for Western teachers, many schools aim to finish their recruitment by the end of January. Jacoutot notes that it is no more unusual for international teachers to be recruited almost a year ahead in October/November 2023 for a September 2024 start.

"The fact that 35% of our MENA vacancies are in Saudi right now illustrates how challenging the market conditions are this year," she says. ■



There is a more positive use of experienced recruitment agents who work with Saudi schools on a closer partnership basis rather than relying solely on direct applications.

— **Roddy Hammond**,
CEO & Founder, Worldteachers
Recruitment Ltd

Bringing 427 years of British academic excellence to the heart of Saudi

Aldenham Prep School Riyadh offers a British education tailored to Saudi Arabia, focusing on student growth and global readiness. With a second campus set to open, the school expands its vision of nurturing future leaders

Aldenham Prep School Riyadh, which opened its doors in September 2022, has quickly established itself as a beacon of high-quality British education in Saudi Arabia. Invited by the Royal Commission for Riyadh City and the Ministry of Investment, the school was a part of the government's initiative to offer outstanding educational opportunities to both expatriate and Saudi families in the Kingdom. The school's unique approach, combining British pedagogical standards with a deep understanding of local needs, has resonated strongly with the community, as reflected in the rapidly increasing student enrollment.

"We have been incredibly encouraged by the trust and enthusiasm shown by families here in Riyadh," says Shahram Hashemi, Co-Founder and Managing Partner of Aldenham Education Group (AEG). "Our student numbers have multiplied many times over since we opened, and this strong demand has prompted us to expand further," he adds.

Aldenham Prep School Riyadh is preparing to open a second campus in the prestigious King Abdullah Financial District (KAFD). With a full K-12 school, the new KAFD campus will cater to students aged 3 to 18, providing a seamless transition for students graduating from the existing campus in North Riyadh and for new students.

One of the key elements of Aldenham Prep School Riyadh's success has been its commitment to having the authentic Aldenham UK experience. Unlike a typical franchise model, the Riyadh campus operates as a true branch of Aldenham UK. The Owner-Operator model is evident in every aspect of the school's operations. "Students and teachers in Riyadh and London interact regularly through video calls, participating in joint school councils and eco-committees to share ideas and foster a sense of global citizenship. Teachers also collaborate closely, benefiting from workshops

and continuous professional development provided by their UK counterparts," explains Hashemi.

"As an example of Aldenham Education Group's pioneering model, the Founding Head at Riyadh, served as Headmistress of Aldenham Prep London for 11 years prior to joining, and played an important role in ensuring that our philosophies, policies and curriculum here in Riyadh reflect those of our UK school while also respecting the unique needs of our diverse community," he adds.

AEG has developed a management model that allows heads and senior educators to focus on what they do best - focus on the students and look for areas of continuous improvement. The current Head of school has extensive experience in British prep education and a strong track record in school leadership across the Middle East and Central Asia and is committed to maintaining Aldenham's tradition of excellence.

"Our aim is to keep our students at the centre of every decision we make," says Hashemi. "We are building a strong, supportive community where students, parents and staff work together for the benefit of all," he adds.

The school's infrastructure supports this mission, featuring a Foundation Stage for children aged 3-5, Lower School for ages 5-7, and Upper School for ages 7-12. The facilities are carefully designed to foster an optimal



Aldenham Prep School Riyadh's success is rooted in delivering the genuine Aldenham UK experience to its students



There is a clear preference for investing in schools that are owner-operated.

— **Shahram Hashemi**,
Co-Founder & Managing Partner,
Aldenham Education Group

learning environment, complete with multiple classes per year group, co-educational settings and a favorable adult-to-child ratio.

Aldenham Prep School Riyadh offers a unique curriculum that combines UK national standards in English and Maths with an internationally focused approach from Fieldwork Education's International Curricula. This curriculum is further enriched with thematic units of inquiry, fostering not only academic excellence but also critical thinking, creativity and lifelong learning skills.

Co-curricular activities are a vital component of the Aldenham educational experience. From sports such as golf, football and tennis to arts, coding, robotics, and much more, students have daily opportunities to explore new passions and develop new skills.

Looking ahead, the school is set to launch several exciting initiatives for the academic year 2024-25. Among these is the introduction of a specialist teacher model for students in Years 5-7, ensuring expert instruction across all subjects. Additionally, the new Aldenham Leadership Pathways programme aims to develop leadership skills among staff, further enhancing the school's commitment to continuous improvement and professional growth.

— **Partner Content**

How Aldenham Education Group merges high-quality education with high-profit outcomes

Shahram Hashemi and Alec H. Nejad, the Co-Founders and Managing Partners of Aldenham Education Group (AEG) discuss investor strategies for achieving high quality education with strong financial returns. They also share their views on the growing demand for private education in Saudi Arabia and AEG's ambitious expansion plans within the GCC

Aldenham Education Group [AEG] is a global education organisation, specialising in the development, acquisition and management of K-12 schools, Early Years Centres, kindergartens and specialty schools.


The group is actively involved in developing new greenfield schools, acquiring existing schools, developing & acquiring Early Years Centres (KGs) and exploring investments in education related ventures and education technology. With ambitions for both local and global growth, AEG is targeting high-potential regions such as Middle East, Southeast Asia, Latin America and certain opportunistic US markets. Within the GCC, its primary focus is on further growth in Saudi Arabia.

In an exclusive interview with Education Middle East, Shahram Hashemi and Alec H. Nejad, the Co-Founders and Managing Partners of Aldenham Education Group (AEG) discuss how investors can achieve top educational outcomes with superior financial returns and share insights on the rising demand for private education in Saudi Arabia and AEG's growth plans in the region.

Hashemi brings a wealth of knowledge in education investments, having overseen numerous investments in the sector and worked for leading private equity firms and regional sovereign wealth funds. Nejad, on the other hand, has extensive experience in operations, building start-up businesses, investment banking, real estate and finance, further strengthening the group's investment strategy.

Can you share an overview of the Aldenham Education Group and its activities?

Shahram: Aldenham Education Group [AEG] is a global education organisation, specialising in the development, acquisition and



In the GCC, the key issues [in building a high-growth educational business] include deal flow, access to affordable land, infrastructure and the availability of qualified human resources.

— **Alec H. Nejad,**
Co-Founder & Managing Partner,
Aldenham Education Group

management of high-calibre K-12 schools, Early Years Centres, kindergartens and specialty schools. Our activities include the creation of new institutions through greenfield and brownfield projects, as well as the acquisition of existing schools and kindergartens. Unlike franchise models, AEG is the owner, operator and investor in all our institutions, allowing us to uphold rigorous standards and deliver exceptional educational experiences across our entire portfolio.

The growth in the education sector requires significant investment, and AEG is a trusted partner for investors looking to back sustainable and impactful initiatives. Our proven track record in successfully developing and managing educational institutions

makes us a preferred choice for those seeking to invest in the sector, fuelling further expansion through the development of new schools and strategic acquisitions.

How do you go about identifying and choosing the right schools for investment?

Shahram: AEG operates as an independent global school group, with a focus on identifying educational opportunities worldwide. Our interest extends globally. In addition to further expansion in the Middle East, we are interested to expand to high-growth regions such as Southeast Asia — countries such as Indonesia, Vietnam and Cambodia — as well as Latin America, and specific areas in the US such as South Florida.

For new school developments, we target countries and cities that exhibit strong economic growth, characterised by a burgeoning middle class and rising incomes from the local population coupled with meaningful FDI and the presence of multi-national corporations requiring high-quality education for their employees. These factors create a fertile environment for the establishment of high-quality educational institutions. When it comes to acquisitions, our approach is less geographically constrained and more focused on the potential to add significant value. This means 'real operational and financial management' vs. a reliance on financial engineering. We assess whether we can enhance the school or kindergarten's operations, elevate academic quality and improve financial performance. Our post-acquisition strategy is driven by a commitment to creating educational institutions that meet our rigorous standards and contribute positively to the communities they serve.

We are always on the lookout for new opportunities and encourage anyone interested in collaborating or presenting potential projects to reach out to us.

Our door is open to explore initiatives that align with our vision of providing exceptional educational experiences.

At AEG you have experience running schools across the globe. How easy or difficult is it to build a high-growth educational business in the GCC vs other parts of the world?

Alec : Building a high-growth educational business presents challenges everywhere but each region has its unique set of obstacles. In the GCC, the key issues include deal flow, access to affordable land, infrastructure and the availability of qualified human resources. Additionally, the regulatory frameworks in some GCC countries are not only bureaucratic but they are in some cases inconsistent, not communicated across relevant ministries or sometimes simply absent. In other cases, some countries like Saudi are making bold reforms at rapid pace and have been outstanding in collaborating with private sector but this still presents challenges to most schools that are not used to environments of uncertainty. All of these add a level of complexity that the vast majority of school management teams are ill equipped to resolve. This is where diverse managerial experience (both educational and non-educational, deep operational knowledge, unwavering persistence, courage of the leadership's convictions, critical and creative thinking) become crucial — knowing how to effectively navigate the diverse stakeholders and challenges is essential in overcoming obstacles and delivering results in this region.

Any word of advice for investors in education on how to offer quality education while delivering returns to shareholders?

Alec: Investors should focus on backing proven educational operators who possess the expertise to navigate local challenges and demonstrate strong operational capabilities. Delivering high-quality education while achieving outstanding financial returns requires a delicate balance and a management willing to always view its decision from a 'value-driver' prism — even if sometimes it is not the 'conventional' choice other schools would make. Meaning each important decision, particularly investment and financial management questions, must pass through a prism that asks for example 'does this enhance the quality of education, opportunity for our children, or bolster competitiveness of the organisation?' Where the answer is 'no', organisations must be bold enough to manage eliminate those expenditures or programmes. Where the answer is 'yes' they must double



Shahram Hashemi and Alec H. Nejad, the Co-Founders and Managing Partners of Aldenham Education Group

down. Quality education demands creating an organisation that runs so efficiently that it allows top-tier senior educators to laser focus on children's education with a mandate from senior management/ownership to keep an eye on continuous improvement rather than on being 'CEO'. To ensure profitability, it's crucial to maintain a strong focus on operational efficiency and effectively manage other expenses, as staffing and educational costs will inherently be higher in top-quality schools. The key is to drive operational excellence while maintaining a steadfast commitment to educational quality.

Which type of schools are gaining the most interest from investors?

Shahram: Investors are increasingly recognising the distinction between owner-operated schools and those that are franchised. There is a clear preference for investing in schools that are owner-operated. The key difference lies in the level of involvement in day-to-day operations by the parent school, especially when linked to an established institution in the UK, and the leadership of the education group. It's not just about placing a well-known name on a building; it's about genuinely delivering that brand's ethos and maintaining high educational quality within the school. Investors understand that the hands-on involvement of experienced operators is crucial in ensuring the success and sustainability of the institution.

What opportunities exist for investors in education in Saudi Arabia?

Alec: Saudi Arabia offers tremendous growth opportunities for high-quality international schools, with market demand steadily increasing for this level of education. There's a significant and growing trend of Saudis enrolling in private schools, and this has been accelerating over time. Additionally, the influx of expatriates, driven by the Kingdom's expanding economic activity, is further boosting demand for quality education. However, as mentioned earlier, there are substantial challenges to growth in this sector. It's crucial for investors to back proven operators who are on the ground and capable of delivering results — both in terms of educational quality and financial profitability.

What are Aldenham Education Group's expansion plans within the GCC?

Shahram: We are actively pursuing expansion throughout the GCC and globally. In the GCC, our primary focus is on further growth in Saudi Arabia, where we are planning to develop Aldenham Schools in Jeddah and the Eastern Province. Additionally, we are keen on expanding our Early Years Education by establishing standalone kindergartens and Early Years Centres across the Kingdom. Beyond Saudi Arabia, we believe there are still significant opportunities in the UAE and Qatar, and we remain open to exploring potential ventures in those countries. ■

OWIS Riyadh:

blending global curriculum with local values

OWIS Riyadh has rapidly grown into a leading educational institution by integrating a global curriculum with a deep respect for Saudi cultural values. Principal Shannon Pipes discusses how the school is redefining learning in alignment with Saudi Arabia's Vision 2030 and preparing students for a dynamic future

Since opening its doors in 2022, One World International School (OWIS) Riyadh has quickly established itself as a forward-thinking institution in Saudi Arabia's rapidly evolving educational landscape. OWIS fosters an environment where academic excellence and social-emotional development go hand in hand. The school blends international curricula with local values, creating a unique learning environment that respects Saudi traditions while promoting global awareness.

In an exclusive interview with Education Middle East, Shannon Pipes, Principal, OWIS Riyadh discusses the school's journey, OWIS Riyadh's alignment with Saudi Arabia's Vision 2030 and innovative programmes at the school that are designed to equip students with critical 21st-century skills.

With 14 years of experience as an educator, Pipes brings a wealth of knowledge and a unique perspective to OWIS Riyadh. Before joining OWIS, she served as an Assistant Principal and Curriculum Coordinator in Abu Dhabi, UAE, and taught English in South Korea and China.

Tell us about the progress OWIS has made since its opening in 2022.

It's been three years since OWIS Riyadh arrived on the Riyadh education landscape, and I am proud to say that our growth in such a short span has been phenomenal.

Our student strength has diversified and grown from 126 to nearly 600. We have become an IB-authorized school for Pre-KG to Grade 5, reflecting the depth of learning at the school, the experience of our educators and the efficacy of our infrastructure to provide high-quality education. We also launched middle grades this year, which in itself is a testimony to the trust shown in our school by the parent community.

There is also a level of vibrancy in our



We follow the American and IB curriculum, integrated with the National identity subjects as per the Ministry of Education to align with local educational requirements.

— Shannon Pipes,
Principal, One World International School
(OWIS) Riyadh

offerings that make us a preferred school. Our partnership with Nikon has led to the launch of the Nikon lab, and we've introduced the FoodTech lab and the ZeroOne Hub for STEM learning. We're also on the journey to become the first Apple Distinguished School in Riyadh and have implemented the Heartfulness programme to support students' social and emotional development and growth. Above all, the support from our parent community has been truly moving and is something we cherish deeply.

How have you implemented the OWIS school model at your Riyadh campus? Did you have to make any specific adaptations for Saudi Arabia?

We've implemented the OWIS school model while also making thoughtful adaptations to fit the local context. Our core philosophies — inclusivity, kindness and international mindedness — are consistent across all OWIS campuses around the world.

We follow the American and IB curriculum, integrated with the

National identity subjects as per the Ministry of Education to align with local educational requirements. We also celebrate Saudi Arabian traditions and place a strong emphasis on preserving the Arabic language as well as its culture. This approach ensures that while our students become global citizens, they also appreciate the values of the country they are in.

How do you equip your students for the challenges of the 21st century?

To prepare our students for the 21st century, we emphasise the four Cs of modern learning skills. We nurture creativity through students' usage of our Art studio, Music studio, Black Box theater and power classes that inspire innovative thinking. Our collaborative approach is reflected in classroom settings designed for group learning and teamwork. We foster critical thinking by integrating IB and American curriculum standards, focusing on real-life problem-solving and global perspectives. For communication, we offer multilingual education and celebrate various cultures through events such as Mother Language Day, Arabic Week, French Day and other language club activities.

In your opinion, how are the reforms under Saudi Arabia's Vision 2030 impacting the quality of teaching and curricula? What, according to you, have been the most notable changes brought about by Vision 2030?

Vision 2030 is significantly enhancing the quality of teaching and curricula in Saudi Arabia. One of the most impactful changes is the emphasis on continuous professional development for educators, which directly improves teaching standards and effectiveness.

The focus on early years education is also making a notable difference. By prioritising early childhood learning, Vision 2030 helps set a strong foundation for students, leading to greater success as they progress to higher grades. At OWIS, we align with

this by prioritising strong foundations through numeracy and phonics in our early years programme, ensuring students are well-prepared for Grade 1.

Can you share details about specific programmes that OWIS has implemented in alignment with Vision 2030?

We've aligned our educational initiatives with the goals of Vision 2030 through our commitment to robust professional development programmes for educators. In our early years programme, we've integrated the IB curriculum with a play-based learning approach, recognising the critical importance of formative years. This programme is further enriched by targeted reading and writing workshops, designed to build strong foundational skills in our young learners.

How do you view the professional development programmes for teachers in Saudi Arabia? Which initiatives do you believe are the most impactful, and why?

Professional development initiatives by Saudi Arabia are empowering teachers and schools to create a competitive and effective learning environment for students. To help students adapt in such an evolving landscape, it's crucial that our teachers are well-equipped with current teaching approaches, methodologies, and the ability to implement those into practice in their own classrooms. The training and workshop sessions we offer for teachers are particularly impactful, as they see real results when they apply what they've learned into the classroom for their students.

Tell us about the major initiatives at your school to support teacher growth.

Our professional development programmes are tailored to keep educators ahead in modern teaching practices. We offer internal promotion opportunities based on skills and contributions to the community. We celebrate excellence through initiatives such as the Global School Awards and the Employee of the Month award.

A cornerstone of our commitment to teacher growth is the Global Annual Leadership Summit, a flagship event of our parent organisation, Global Schools Group. This summit brings together leadership from all our network campuses for impactful discussions and conferences. We host a campus-level version of this event for our teachers, offering them valuable opportunities to engage, learn and grow within our global community.

What are your passions in education?

My passion in education is centred



Shannon Pipes, Principal, One World International School (OWIS) Riyadh

around educating the whole child, focusing not just on academics but also on their social-emotional development. At OWIS, we emphasise 'Learning at Home Expectations,' which is also highly appreciated by parents. This approach ensures a perfect balance between life as a student and life as a family member for our learners. It includes simple, impactful practices such as having dinner together and being an active member of their family.

Literacy is also a core focus for me, as it's fundamental to all aspects of learning. I'm also passionate about the intentional and responsible use of technology in education as they hold great promise for enhancing our children's learning experiences.

In your view, how is AI transforming education in Saudi Arabia, and what role is the government playing in supporting these technological advancements?

Saudi Arabia is making impressive strides in enhancing education through AI, and their efforts are truly commendable. The country's focus on integrating advanced technology

into education is evident in the numerous worldwide conferences and workshops that help educators stay at the forefront of these developments. With many tech-based multinational companies launching initiatives locally, the country is positioning itself as a competitive leader in the AI space.

What major trends do you foresee shaping the future of education in Saudi Arabia?

Looking ahead, I hope to see co-ed classes become more prevalent, where students can learn from and with each other, preparing them for a collaborative world.

The continuous enhancement of technology will also play a pivotal role. Upskilling educators from their university years before they become full-time teachers will shape the future of education in Saudi Arabia. I am eager to see decisive measures taken to make this a reality.

These trends collectively indicate a shift towards a more inclusive, technologically advanced, and high-quality educational landscape in the country. ■

Pioneer of new technologies

Armed with the knowledge and resources to lead in innovative learning platforms, a growing focus on STEM and effective use of AI, Saudi Arabia is all set to transform its education system. This forward-thinking approach aims to prepare students to lead the global workforce and contribute to the country's economic diversification



The introduction of AI tools is revolutionising personalised learning and providing new ways for students to engage with content.

— **Shahram Hashemi**,
Managing Partner,
Aldenham Education Group

By **Joseph George**

Technology adoption across schools and higher education institutions in Saudi Arabia is rapidly advancing, thanks to a combination of local initiatives and global advancements.

Both global and regional technology companies, along with educational institutions, have taken a proactive approach, supported by strong regulatory frameworks. The Saudi government agenda is in tune with its Vision 2030 plan, providing sufficient financial backing with prioritised budget allocations.

The government's aim to transform the country's education system is to prepare its youth for a better future, help diversify the economy and position Saudi to compete among the leading global economies.

Government push

The Saudi Ministry of Education has played a pivotal role in overseeing and facilitating the implementation of these changes.

The Tatweer project, launched in 2008, aimed to improve the quality of education with emphasis on the development of educational curricula, enhancement of educational facilities and professional training for teachers.

The project aimed at providing students with more interactive and personalised learning experiences. The implementation faced challenges due to lack of and inconsistent integration of digital resources in classrooms.

However, the onset of COVID and disruption of regular schooling left schools and higher education institutions with no other option but to embrace the latest tech solutions.



Saudi Arabia's government and education sector are united in their commitment to leverage technology to prepare students for a digital future



IT has shifted from a support function to a strategic partner in driving learning innovation.

— **Raad Noures,**
Regional Director - Sales & Education
Lead, Saudi Arabia, Dell Technologies

Saudi schools now incorporate a range of sophisticated technologies, from interactive whiteboards to digital textbooks and e-learning platforms, enriching the traditional classroom experience and making learning more engaging and effective.

The Saudi Ministry of Education's efforts in developing an integrated e-learning system by utilising and investing in modern technologies also yielded significant results. The National Center for E-Learning played a key role in promoting e-learning, with initiatives such as digital platforms, educational resources and e-courses.

The Madrasati remote learning platform - one of the largest learning platforms implemented in the Arab world - has been providing content through varied digital solutions, electronic courses and educational resources. The World Bank estimates that more than 6 million students benefitted from the platform during COVID. The result of a teacher survey it conducted revealed that two thirds of respondents confirmed that students' academic achievements and skills had increased as a result of using the Madrasati platform.

Another notable initiative is the Rawdati platform and the virtual kindergarten application, which targets children from three to six years old.

Similarly, education content was broadcast on 24 education channels on EIN Satellite TV and on YouTube.

The 'Madrasati Codes' competition, aimed at enhancing the digital skills of students through coding, enabled the



VR and AR digital modules provide visual learners with a deeper understanding of complex concepts



However, it is important to note that there are discrepancies among regions [within Saudi Arabia] in which infrastructure struggles at times to ensure universal access and optimal functionality.

— **Emad Sallam,**
Head of Education, B2B - Logitech, GCC

Kingdom to move up to ninth place in the Code.org rankings in 2021.

The Flexible Learning Paths was another initiative to develop digital transformation in education and to enhance professional skills among the

educators. The FutureX platform, in partnership with other international platforms Coursera, Edx, Udacity and Future Learn, provides access to more than 10,000 professional courses, programmes and certificates.

Technology adoption

Today there is also a greater recognition in Saudi that Science, Technology, Engineering, and Mathematics (STEM) is a crucial part of education and a necessary ingredient for training future workforce who can contribute to the country's economic growth.

Shahram Hashemi, Managing Partner, Aldenham Education Group says in Saudi Arabia there has been a noticeable increase in the adoption of educational technologies such as interactive whiteboards, learning management systems (LMS) and virtual reality (VR) tools.

Commenting on technology initiatives generating excitement, Hashemi says, "The introduction of AI tools is revolutionising personalised learning and providing new ways for students to engage with content. There is a growing focus on STEM education, with initiatives aimed at integrating more robotics and coding into the curriculum."

"There is a growing emphasis on coding and robotics, with many schools incorporating these subjects into their curriculum to foster critical

thinking and problem-solving skills among students,” he says.

Jacob Chacko, Regional Director for Middle East & Africa, HPE Aruba Networking says the integration of leading technologies is an integral part of the country’s ambitious goals under Saudi Vision 2030.

“This also guides the decisions of the Ministry of Education as it focuses on overhauling curricula and raising standards nationwide,” he says.

What’s currently being implemented in K-12 as part of technology adoption is the adoption of interactive educational technologies and tools such as AI-powered educational aids, e-learning systems, smart classrooms, learning management systems, adaptive learning and cloud computing.

Schools are increasingly incorporating video conferencing platforms, digital learning tools, and AI-driven educational aids to facilitate seamless transitions between in-person and remote learning environments, says Emad Sallam, Head of Education B2B - Logitech, GCC.

According to him, emerging technologies such as AI, VR, and AR will play a key role in boosting student engagement. “These unconventional teaching approaches will make it much easier for students of all ages and learning styles to adapt and flourish in the classroom. For instance, interactive digital modules utilising VR and AR will fortify understanding for visual learners who may struggle to grasp certain concepts through standard whiteboard teaching,” he adds.

Raad Noures, Regional Director – Sales & Education Lead, Saudi Arabia, Dell Technologies notes that the innovations with AI are limitless, especially when it comes to personalisation. “For example, AI can be used to tailor educational experiences to individual students by analysing their learning patterns, strengths and weaknesses, which helps address their unique needs and improve learning outcomes. AI PCs, for instance, can further drive collaboration, efficiency and creativity,” he says.

Noures points out that when it comes to VR and AR, interactive learning environments could feature as a main use case, helping with collaboration, skills-training and making abstract concepts more tangible through simulations.

“By integrating these digital solutions in the classroom, children can learn in new ways, giving them a chance to experiment and develop their creativity at an early age. Overall,



Tablets are becoming more common in Saudi schools, with Bring Your Own Device (BYOD) policies gaining popularity

these technologies when used in the right way can help make learning more personalised, immersive, accessible and effective,” says Noures.

According to him, the level of AI integration will be a key factor in the success measure of educational entities, especially with the Kingdom’s focus on promoting digital learning solutions and technology adoption.

“Some of these include the increase in use of chatbots for assistance, student virtual wallets and smart classes equipped with VR and AR. Schools are also adopting cloud-based solutions for content management and device access while

exploring the use of e-portfolios for students to showcase their skills and achievements,” adds Noures.

Student-centred learning, he says, has now become a key focus across schools in Saudi Arabia. “Devices like tablets and laptops are becoming increasingly common and Bring Your Own Device (BYOD) policies are gaining traction. Additionally, interactive whiteboards are widely utilised, with half of the teachers in Saudi Arabia incorporating them into their classroom activities,” says Noures.

Commenting on the initiatives in his school, Hashemi says the school has implemented a 1:1 device access policy,

ensuring that each student has access to a device to use for learning as the curriculum requires.

“Devices are used to support various aspects of the curriculum, making learning more accessible and interactive. Smartboards have been integrated into all classrooms. Additionally, we have established a computer suite, a robotics lab and a VR suite,” he says adding that these advancements have collectively transformed the educational environment at the school, making technology an integral part of the teaching and learning processes.

Private participation

Chacko says the government is also seeking private sector involvement to support technology adoption.

This, he says, has led to significant advancements in bringing competitive IT infrastructure to education institutes, offering high-speed internet, wireless and 5G connectivity, enhancing security through technology integration, and providing a cloud experience by collaboration with public and private cloud providers.

Speaking about Saudi’s standing compared to other countries in the region, Sallam notes that the country’s IT infrastructure in schools is consistently evolving and remains highly competitive within the GCC. “However, it is important to note that there are discrepancies among regions, in which infrastructure struggles at times to ensure universal access and optimal functionality,” he adds.

Sallam says a more advanced integration will facilitate seamless transitions between in-person and remote learning and feature important technology enhancements such as voice amplification and visual accessibility and enable hybrid learning environments and personalised educational experiences, accommodating diverse student needs and learning styles.

“These specifications make K-12 in Saudi best-equipped to meet the evolving educational needs and encourage greater classroom engagement,” he adds.

Noures also vouches that the technology adoption rate in Saudi surpasses that of several other countries, including the US, China and Spain.

Challenges

However, challenges continue to prevail, especially related to adaptability, scalability and training.

Despite the government allocating nearly 18% of its SAR 1 trillion budget



The government is also seeking private sector involvement to support technology adoption. This has led to significant advancements in bringing competitive IT infrastructure to education institutes, offering high-speed internet, wireless and 5G connectivity...

— **Jacob Chacko**,
Regional Director for Middle East & Africa,
HPE Aruba Networking

to education, modernising the legacy infrastructure, training teachers to effectively use technology and implementing AI in more than 26,000 K-12 schools across the country will be a herculean task.

One of the key challenges in integrating the latest technology, he says, is ensuring that it complements the full learning experience and curriculum.

“It is crucial to carefully consider how each piece of technology supports and enhances the educational goals rather than distract from them. We strive to strike a balance between innovative technological integration and maintaining the integrity of our educational programmes,” says Hashemi.

Experts are of the opinion that suppliers must balance cost-effective solutions with performance and scalability and brands should not only take on the onus of training teachers in the use of their products and solutions but also focus on designing intuitive, user-friendly interfaces for both students and teachers.

“As students and teachers navigate learning and teaching in the digital age, we believe a tailored, adaptable and resilient IT approach will prove essential for learning in the digital classroom,” says Noures.

“As-a-service procurement models

empower education leaders to prioritise digital progress, enabling IT departments to break free from the constraints of rigid vendor service agreements,” he adds.

According to Sallam, collaborating closely with educators and policymakers is equally crucial to understand specific requirements and prioritise effective technology integration in Saudi schools.

Today the Saudi education system is being driven by the goals and objectives of Vision 2030, which prioritises education as a fundamental pillar for national transformation, and technology adoption has become increasingly integral to that goal.

“IT has shifted from a support function to a strategic partner in driving learning innovation,” says Noures.

“It is encouraging to note that both the government and the education sector are committed to using technology to enhance learning experiences and prepare students for the digital future,” says Noures.

What’s next

Commenting on what can be achieved in the next five years, experts feel there would be greater collaboration between teachers and students to make learning more interactive, immersive and innovative.

“The integration of advanced technologies will not only make learning more immersive and interactive but also enable educators to track and analyse student progress more effectively, ensuring that each learner receives the support they need to succeed,” says Noures.

Cloud-based platforms, he says, will further facilitate collaboration and communication between students and teachers, both inside and outside the classroom, and newer platforms that support remote and hybrid learning models will ensure education remains inclusive, flexible and accessible. “Teachers and students will become co-creators actively leveraging technology in meaningful ways,” he adds.

According to Sallam, the next five years will see technology in Saudi schools evolving towards integrated solutions dedicated to supporting a range of learning environments and needs.

“Technology will importantly prioritise accessibility, ensuring that students of all abilities and learning needs can participate in educational activities. This will provide the foundation for a truly equitable learning environment in which tailored tools can be applied to meet the needs of all students,” says Sallam. ■

Vision 2030 fuels growth in Saudi higher education

Saudi Arabia's higher education sector continues to evolve, with many international universities trying to make an entry. By 2030, the sector is set to accommodate around 2.82 million seats, with 150,000 in private institutions and 2.7 million in public ones



Approximately 72% of student population is concentrated in four provinces - Riyadh, Mecca, the Eastern Provinces and Madinah.

— **Mansoor Ahmed,**
Executive Director, Colliers in MENA

As Saudi Arabia progresses toward its Vision 2030 goals aimed at enhancing its human capital, creating a job-ready workforce and transitioning from an oil-based to a knowledge-based economy, the emphasis is on effectively transforming its education system, particularly the higher education sector.

The ongoing reforms aim to align higher education with global standards, attract more private participation and bring about necessary changes in the curriculum, including the incorporation of technologies such as AI and robotics, all aimed at fostering innovation.

The government has massively invested in ushering new reforms into the education sector with record budget allocations over the past few years. Saudi Arabia leads the GCC in government spending on education. In the 2023 budget, SAR189 billion was allocated to education, with 42% of it dedicated to Higher Education and Technical and Vocational Training in 2023. The allocation increased to SAR191 billion in 2024.

The higher education scene in the Kingdom is predominantly reliant on the public sector. Based on Colliers' estimates, almost 2 million students registered in 2022 in Saudi Arabia, out of which only 5% enrolled in the



Saudi Arabia leads the GCC in government spending on education



Approximately 32,000 doctors, 64,000 nurses, and 10,000 pharmacists are needed to serve a population of about 45 million. Additionally, advancements in medical technology will require specialised education for medical professionals.

— **Namit Goel,**
 Founder & Director, Ken Research



The proportion of male students is significantly higher (86%) at public institutions offering technical, vocational, or military courses

private sector while the remaining 95% (1.9 million) students joined public and semi-public institutions.

In 2023 the Saudi Council of Universities Affairs approved the Executive Regulation for establishing branches of foreign universities in the Kingdom, laying down new guidelines and approval systems, medium of instruction criteria and certification guidelines.

Saudi Arabia has initiated several programmes to invite foreign universities to set up their branches in the Kingdom. Many prominent private universities from the US, the UK, Australia and Spain are planning to establish their presence in Saudi.

Penetration of foreign universities

According to R Consultancy Group, among the institutions expected to set up centres in Saudi are Arizona State University (ASU), Royal College of Surgeons in Ireland (RCSI), University of Wollongong, IE University and University of Strathclyde.

Among the factors fuelling the demand for higher education is the fast-growing demographic profiles along with government’s own Saudisation requirements. “These and other factors like diversification, and growing income standards are set to redefine the dynamics and provision of

higher education in the country,” says Mansoor Ahmed, Executive Director, Colliers in MENA.

According to Namit Goel, Founder & Director at Ken Research, Saudi Arabia witnessed significant enrollment in traditional majors like Business Administration & Law - 533,352 students (27%), followed by Humanities with 434,583 students (22%), Natural Sciences with 158,080 students (8%) and Health & Wellbeing with 118,523 students (6%).

“By 2030, it is expected to accommodate approximately 2.82 million seats, with 0.15 million seats in the private sector and 2.7 million in the public sector,” he says adding that the current pattern of enrollment distribution heavily favouring public universities - which mainly emphasises on humanities and Islamic Studies - may not meet the market demands set by the Vision 2030 plan.

“To bridge this gap, there’s a shift

expected towards specialised fields like technology, AI, renewable energy and R&D. Growth opportunities also exist in health, hospitality and SME sectors, supported by tourism projects and entrepreneurship initiatives. Ensuring alignment between educational offerings and market needs is crucial for sustained growth and workforce readiness,” says Goel.

Pointing out that healthcare and tourism are other key sectors expected to see high demand by 2030, Goel says, “Approximately 32,000 doctors, 64,000 nurses and 10,000 pharmacists are needed to serve a population of about 45 million. Additionally, advancements in medical technology will require specialised education for medical professionals.”

“The tourism sector is primed for significant growth, aiming to boost its GDP contribution from 3% to 10% by 2030. This initiative is projected to attract 100 million annual visits

HIGHER EDUCATION

and generate around 1 million jobs. This growth in tourism will also foster demand for tourism professionals and create opportunities for higher education providers to expand tourism education programmes,” he says adding that the push for Saudisation aims to fill these roles predominantly with Saudi nationals.

The enforcement of Saudisation laws across various business sectors is aimed at generating jobs for citizens, fuelling demand for higher education and more specifically the technical and vocational training sector - pivotal in training, up-skilling and reskilling the local population to meet the growing demands of the labour market.

Meanwhile, the government is all set to apply a cap of 60% on the number of high school graduates attending universities, with the remaining 40% of students being redirected into technical and vocational education sector.

Disciplines gaining traction

There is also a shift in demand from traditional offerings towards artificial intelligence, robotic sciences, nuclear energy, sustainable energy, renewable energy and solar energy, according to a study by real estate consultancy Colliers.

Ahmed says a majority of the demand for Saudi higher education was for courses like Business Administration, Law, Humanities, Natural Sciences and Health & Wellbeing, in line with international trends.

“The demand is expected to shift towards evidence-based R&D studies - taking into consideration the economic transformation agenda under Vision 2030 and the changing market dynamics - rather than traditional fields of study to overcome the mismatch between the degrees, skills and requirements of the employment market.”

According to him, there is a growing emphasis on enhancing the quality of higher education in Saudi, with a focus on accreditation and quality assurance mechanisms. The government has implemented initiatives to improve the standards of universities and ensure alignment with international best practices.

In addition, inclusivity and diversity are emerging as critical considerations in Saudi Arabia’s higher education landscape. At both public and private universities enrollment of female students is higher (54%) compared to male students. However, the proportion

of male students is significantly higher (86%) at other public institutions offering technical, vocational, or military courses. According to Ahmed, approximately 72% of student population is concentrated in four provinces - Riyadh, Mecca, the Eastern Provinces and Madinah.

As Saudi Arabia’s higher education sector continues to evolve, international universities are trying to make an entry into Saudi as a potential hub for expansion. “International universities can explore partnerships with local institutions, government agencies and private organisations to establish joint programmes, research collaborations and exchange opportunities,” says Ahmed.

However, cultural and regulatory differences, growing competition in the higher education market and language barrier present hurdles for international universities operating in Saudi Arabia. “While English is widely spoken in academic and business settings, language barriers may still exist, particularly among the local population,” says Ahmed adding that international universities may need to offer language support and adaptation of curriculum to accommodate local needs. ■



Female enrollment surpasses male students in Saudi Arabia in both public and private universities, reaching 54%

