<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
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</thead>
<tbody>
<tr>
<td>EDUCATION SERVICES</td>
<td>PRIMARY EDUCATION</td>
<td>TECHNICAL TRAINING</td>
</tr>
<tr>
<td>4</td>
<td>5</td>
<td>6</td>
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<tr>
<td>VOCATIONAL TRAINING</td>
<td>HIGHER EDUCATION</td>
<td>EDUCATIONAL SUPPORT ACTIVITIES</td>
</tr>
<tr>
<td>7</td>
<td>8</td>
<td>9</td>
</tr>
<tr>
<td>GENERAL SECONDARY EDUCATION</td>
<td>PRE-PRIMARY EDUCATION</td>
<td>CULTURAL EDUCATION</td>
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Several sectors in Saudi Arabia are emerging as they are key contributors and enablers to achieving the country’s Vision 2030.

The Education & Training Sector is being reshaped in an effort to improve its quality and outcome.

The country is focusing on developing early childhood education, refining its national curriculum and training its teachers and educational leaders.

In addition, it is reforming the regulations paving the way for investors and the private sectors.
DETAILED VALUE PROPOSITION

LARGEST MARKET IN THE GCC
- 300 thousand in Kindergartens
- 5.5 million in Primary Education
- 128 thousand in Technical Institutions
- 1.4 million in Higher Education
  Total pool of students is also expected to grow at an annual rate of 3.5% through 2020

NEW OPPORTUNITIES
- A new and untapped market for kindergartens and nurseries just emerged as the new vision focuses on developing early childhood education
- High demand for private schools will surge as KSA encourages increasing the enrolment of students in private schools from 15 to 25
- New cities, new ecosystems and new projects (e.g., Neom, Red Sea project) will be set to attract Saudi and expat talent, and therefore require high-standard educational institutions

NEED FOR NEW TALENT
- The Kingdom moves into a more diversified economy
- The labor market is advancing
- A high demand for new degree graduates, technical/vocational education, and training programs

COMMITMENT TO IMPROVE QUALITY & OUTCOME
- KSA is committed to improve the quality and outcome of the education system
- Set of targets should be reached by 2030
- This will be achieved in close collaboration with the private sector (e.g., investing in teacher development training)

A NEW ERA FOR THE PRIVATE SECTOR
- KSA is committed, through Vision 2030, to increase private sector participation (e.g., innovative programs, independent schools)
- KSA education market has been transformed, allowing full foreign ownership of education institutions
- Government agencies are working to further improve the attractiveness of the sector to private players

07
# Facts and Figures

## Education Is the Second Largest Area of Government’s Spending

### Young and Skilled Workforce

- **50%** of population under the age of **30**

### Education & Training Investments

- Unlocking Investments in Education & Training sector for Foreign Investors

### Saudi Education System

- **7.3 mn** students in the Saudi education system

### Age Population

- Saudi youth aged between 29-20 years make up **31%** of the total Saudi working

### Labor Market

- **400,000** young Saudis enter the labor market every year strengthening the development of workforce skills and capabilities

## Education Budget

### Current Education Budget

- **192$ bn**
  - **Current General Education Budget**

- **2,246.25$ bn**
  - **Early Childhood Initiative**

### New Kindergartens and Nurseries Programs

- **3 buildings**

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Source: Saudi Arabia’s Vision 2030; SAGIA; General Authority for Statistics; Ministry of Education; The World Bank; Oxford Business Group; Shanghai University Ranking
INTERNATIONAL TECHNICAL COLLEGES

<table>
<thead>
<tr>
<th>Category</th>
<th>2013</th>
<th>2017</th>
<th>Change</th>
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</thead>
<tbody>
<tr>
<td>Students</td>
<td>2,183</td>
<td>19,817</td>
<td>~10x</td>
</tr>
<tr>
<td>Specialization</td>
<td>5</td>
<td>25</td>
<td>5x</td>
</tr>
<tr>
<td>Colleges</td>
<td>10</td>
<td>31</td>
<td>~3x</td>
</tr>
</tbody>
</table>
MoE PROPOSED SCHOOLS DEVELOPMENT PLAN IN JEDDAH AND MAKKAH

WAVE 1 SCALE

60
Schools

50,000
Student capacity

2021
Year of full availability

PROPOSED SCHOOLS

MoE PROPOSED SCHOOL DESIGN

- Appropriately designed spaces that meet the evolving educational needs of the kingdom.
- Quality and durability through simple, elegant, and well specified building forms which are scalable and replicable across the Kingdom.
- Attractive design suitable for the intended education level groups and genders which offer a sense of identification.
- Inspirational environment to learn in, manifested in new and improved school buildings.

INVESTMENT CATEGORIES

TYPE OF INVESTORS IN SERVICES

Design
Planning
Construction Management
Contract Management
Equipping and Furnishing
Asset Management
Project Management
INVESTMENT CATEGORIES

K12-
- STEM Education
- Design & Technology Labs
- Fablabs/Maker spaces
- School information & Management
- ICT infrastructure solutions
- Digital & Mobile learning
- Immersive learning technologies
- Testing and Assessments
- E-Marketing
- Library Solutions
- Learning Spaces

CORPORATE
- Human Capital Management and Implementation
- Assessments and Certification
- Game based learning
- Custom Learning Solutions
- Immersive ideation and collaboration technologies

HIGHER AND VOCATIONAL
- Fablabs/Maker spaces
- Engineering and research labs
- Simulations
- Innovation Centers
- Active Learning Platforms
- Campus Management Systems
- ICT infrastructure solutions
- Testing and Assessments
- Immersive learning and Ideation technology
- Integrated library
- Systems
- Library RFID technology
- Digital libraries

GOVERNMENT
- Curriculum research and consultancy
- Teacher Excellence Programs
- Smart Learning Projects
- Custom Learning Solutions
- Immersive ideation and collaboration technologies
- Innovation centers
- Public library Solutions
SUCCESS STORIES

Unlocking investments in the Education & Training Sector for foreigners with ownership up to 100%

A National Investment Committee created for the Education & Training Sector

Converting existing investors’ specialization from “Services” to “Education & Training”

TWO TYPES OF OPPORTUNITIES

EXISTING (PRIVATIZATION)
(e.g., privatizing a public school)

NEW (MARKET DRIVEN)
(e.g., establishment of a new private school)
MAJOR INVESTMENT OPPORTUNITIES IN EDUCATION & TRAINING

SUB-SECTORS

EARLY EDUCATION

PRIMARY EDUCATION

SECONDARY TECHNICAL & VOCATIONAL EDUCATION

ACADEMIC EDUCATION

Expansion of local Education & Training Institutions that offer local and international education standards.

Establishment of new Education & Training Institutions that offer local and international education standards.

Several initiatives started by the public sector to Build and Operate Educational Entities.

Ministry of Education MoE is offering large number of assets (lands + buildings) to empower investments in the Education & Training Sector.
SAUDI GENERAL INVESTMENT AUTHORITY CONNECTIONS

SAUDI GENERAL INVESTMENT AUTHORITY CAN CONNECT YOU WITH...
Saudi General Investment Authority is the Kingdom’s investment promotion agency. Our priorities are to attract and develop foreign investment, enhance the nation’s investment climate, increase the ease of doing business, and eliminate obstacles from investors’ journey.

To discover the countless opportunities, across major economic sectors, that Saudi Arabia has to offer:

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