



**Market
Intelligence
Brief**
Saudi Arabia

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1 Introduction

Saudi Arabia is home to the largest economy in the Middle East and is the world's second largest producer of oil after the United States. It is one of the leading sources of international students in the UK and other major English-speaking destinations thanks to large-scale scholarship programmes that provide funding for Saudi students studying undergraduate and postgraduate programmes abroad.

Saudi Arabia invests heavily in education and has achieved almost universal participation in basic education and gross tertiary enrolment of over 70 per cent in tertiary education – a higher proportion than in the UK. However rapid expansion has led to uneven quality and Saudi students perform poorly in international assessments such as PISA.

To overcome these challenges the country's education policies now emphasise improving the standard of teaching and quality assurance as well as aligning the education system more closely with labour market needs. Reforms to education play an important role in a broader reform programme that aims to liberalise Saudi Arabia's society and economy and prepare the country for a post-oil future.

Saudi Arabia was the world's 15th largest sender of internationally mobile tertiary students in 2019 – a proportion which is particularly impressive given the country's relatively small population. Over 90 per cent of Saudi HE students studying abroad are funded by scholarships which means that changes to scholarship policy have a large effect on mobility trends. This was illustrated in 2016 when major cuts to the country's flagship scholarship programme had a severe effect on outbound student numbers, and in 2018 when diplomatic disputes led to Saudi Arabia withdrawing scholarship-funded students from Canadian universities. Saudi Arabia is also a major regional destination for international students from other Middle Eastern countries and the wider Islamic world.

Transnational education in Saudi Arabia is currently mainly limited to distance learning programmes. Most students studying for UK degrees in the country are enrolled with the Arab Open University, a distance learning provider that works with the UK's Open University to deliver a programme awarding both UK qualifications and its own degrees. Other students study distance learning courses directly taught by UK universities; qualifications from these courses are not recognised by Saudi education authorities but are valued by private-sector employers.

Saudi education authorities are currently working on detailed regulations which would allow overseas universities to operate branch campuses in the country, after legislation allowing this form of international education cooperation was passed in late 2019. Meanwhile at the basic education level Saudi Arabia is home to a large number of international schools which are mainly attended by the children of the country's many overseas workers – more than a third of Saudi Arabia's population and roughly three quarters of the labour force are foreign citizens.

In March 2018, the UK and Saudi Arabia formed an education partnership as part of a broader strategic partnership between the two countries. Recent achievements under this partnership have included support and knowledge-sharing in areas such as special education needs, vocational education, research and innovation, and transnational education.

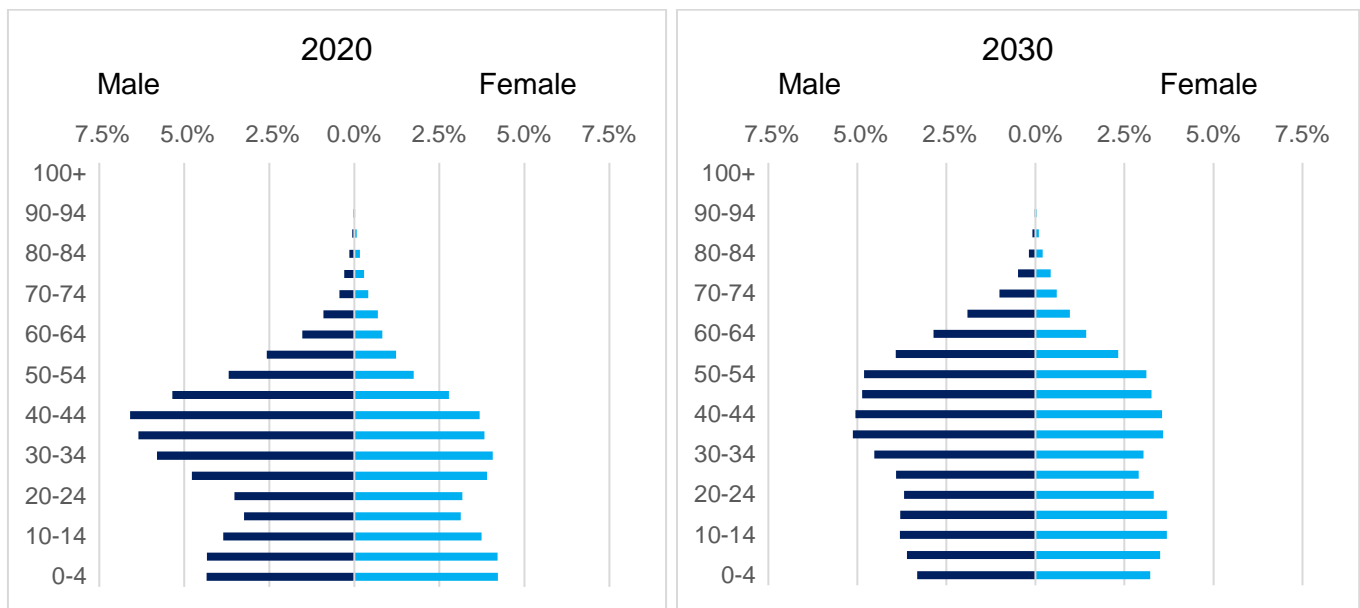
2 Macro Environment

2.1 People

Saudi Arabia's population stood at almost 35 million in 2020, slightly more than half of that of the UK. The country's population has grown rapidly in recent years, increasing by 27 per cent over the last decade and more than doubling over the last 30 years.¹ The UN Population Division expects this growth to slow down somewhat over the next decade, but the population is still likely to exceed 39 million by 2030.

Men outnumber women overall, making up 58 per cent of the total population in 2020. This is mainly due to the large number of expatriate workers in the country – as of 2018, 38 per cent of residents were not Saudi citizens, and more than two thirds of this group were male.² The top three nationalities of foreign residents in 2017/18 were Syrian, Indian and Pakistani, with most of the other top countries also being in the Middle East or South Asia.³ In recent years the number of foreign citizens in the country has begun to fall due to a combination of government policy encouraging employers to hire more Saudi nationals and a declining economic situation exacerbated by the Covid-19 pandemic.⁴

Figure 1: Saudi Arabia's population pyramid, 2020 and 2030



Source: UN Population Division

¹ UN Population Division, *World Population Prospects, 2021* <https://population.un.org/wpp>

² General Authority for Statistics, *Population by Gender, Age Groups and Nationality, 2018* <https://www.stats.gov.sa/en/43>. More recent data is not available.

³ Saudi Arabia's Population Statistics of 2021, *Global Media Insight*, 08 March 2021 <https://www.globalmediainsight.com/blog/saudi-arabia-population-statistics/>

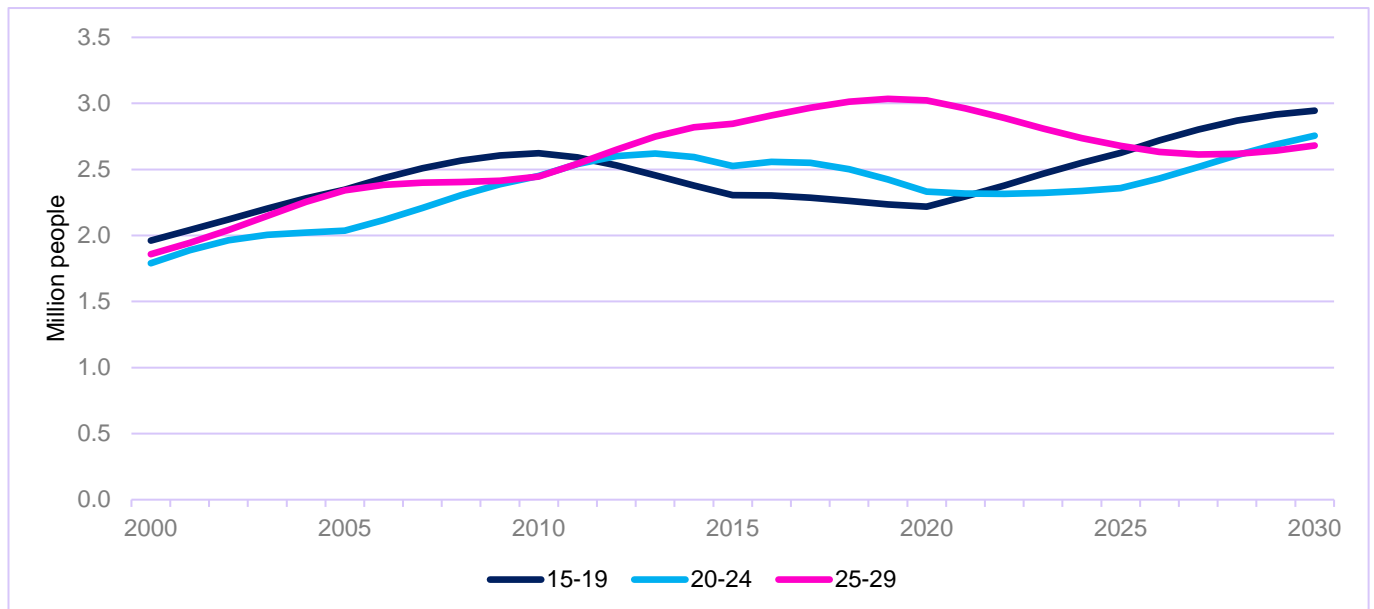
⁴ Around 1.2 million foreign workers to leave Saudi Arabia, says report, *Al Arabiya*, 2020 <https://english.alarabiya.net/coronavirus/2020/06/16/Coronavirus-Around-1-2-million-foreign-workers-to-leave-Saudi-Arabia-says-report>

The Saudi student-age population (15-29) is growing, despite becoming a smaller proportion of the population overall. In 2020 Saudi Arabia had around 7.6 million people in this age range, but this number is expected to grow to around 8.4 million by 2030, an increase of around 11 per cent. However, their share of the overall population is projected to decline slightly, from 22 to 21 per cent.

When this group is split into three equally spaced age ranges, youths aged 15-19 were the smallest segment in 2020. It is however forecast to grow quickly and become the largest of the three student-age segments later in the decade. This segment represents the population roughly at the age to pursue undergraduate studies and the expected growth indicates potential growth in the undergraduate market.

The 20-24 age segment is also predicted to grow from 2022 after a period of decline beginning in 2013. It is expected to overtake the 25-29 segment in 2028. This translates into an increase in potential master's students. The 25-29 segment is currently the largest but began to decline in 2020 and is expected to be the smallest segment by 2028.

Figure 2: Saudi Arabia's student age population



Source: UN Population Division

Arabic is the official language of Saudi Arabia, and as with other Arabic speaking countries, Modern Standard Arabic is used as the written and formal language, but the majority of Saudi Arabians speak one of three main dialects in everyday life: Hejazi, Najdi and Gulf Arabic.⁵

Saudi Arabia is recognised as the birthplace of Islam and the majority of the population are adherents to the Sunni branch of the religion. Among Saudi citizens 85 to 90 per cent are Sunni, while 10 to 15 per cent are Shi'a. The conservative Wahhabi interpretation of Islam is highly influential and a key force in Saudi governance.⁶ Information on religions among the non-citizen

⁵ Languages in Saudi Arabia, *StudyCountry*, accessed 01 December 2021

<https://www.studycountry.com/guide/SA-language.htm>

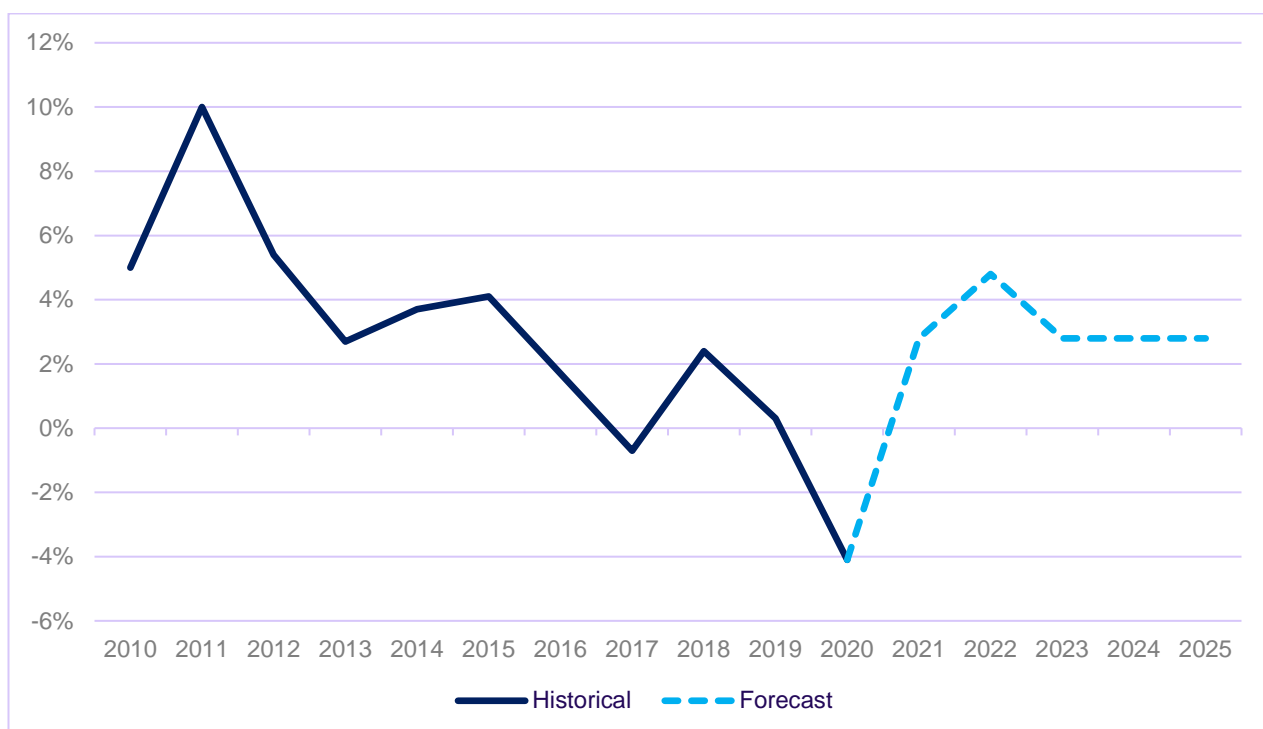
⁶ Religion of Saudi Arabia, *Britannica*, accessed 01 December 2021 <https://www.britannica.com/place/Saudi-Arabia/Economy>

population is more limited, but in general is more varied even though most expatriate workers come from Muslim-majority countries.⁷

2.2 Economy

Saudi Arabia is the largest economy in the Middle East, with a GDP of USD \$700 Bn in 2020 according to the World Bank.⁸ Saudi Arabia's GDP growth has declined over the last decade, partly due to falling oil prices. As with much of the world, the global Covid-19 pandemic hit Saudi GDP, but not as aggressively as many nations. GDP contracted by 4.1 per cent in 2020 but growth is expected to rebound to around 2.8 per cent in 2021.⁹

Figure 3: Real GDP growth and forecast



Source: IMF

Saudi Arabia is the second largest producer of oil globally after the US and possesses the second largest oil reserves in the world after Venezuela, overall around a fifth of global reserves. Behind Saudi Arabia's massive oil production is ARAMCO, the largest oil company in the world. Originally formed from a concession agreement between Saudi Arabia and the Standard Oil Company of California in the 1930s, the Saudi government gradually gained direct ownership of ARAMCO from the 1970s onwards.¹⁰ In 2019, ARAMCO went public with the

⁷ Saudi Arabia, *CIA World Factbook*, 2021 <https://www.cia.gov/the-world-factbook/countries/saudi-arabia/>

⁸ GDP (current US\$) - Saudi Arabia, *World Bank*, 2021 <https://data.worldbank.org/indicator/NY.GDP.MKTP.CD?locations=SA>

⁹ Real GDP Growth, *IMF*, accessed 2021 https://www.imf.org/external/datamapper/NGDP_RPCH@WEO/SAU?year=2019

¹⁰ What is Saudi Aramco?, *Investopedia*, 20 May 2020 <https://www.investopedia.com/what-is-saudi-aramco-4682590>

largest valuation in history and is now among the largest companies in the world by market capitalization.¹¹

While the oil sector accounts for a substantial share of the country's economy, making up 23 per cent of GDP in 2020 according to official statistics,¹² diversifying the economy away from oil dependency has become the key factor in Saudi Arabia's economic planning as laid out in Saudi Arabia's current economic strategy blueprint, Vision 2030. The government plans to transform the domestic economy through 13 programmes each dedicated to aspects of the country's overall economic development.¹³ Some key goals of the initiative include:

- creating the world's largest sovereign wealth fund (Saudi is currently ranked eighth with top spots held by Norway, China and UAE)¹⁴,
- transforming Aramco from an oil company into a global industrial conglomerate and the privatisation of other state-owned assets,
- encouraging major domestic corporations to move into global markets and supporting the development of small and medium-sized enterprises,
- restructuring of the business environment, creating special economic zones and deregulating the energy sector,
- increasing foreign direct investment to the international average of 5.7 per cent of GDP,
- having half of military manufacturing taking place within the Kingdom,
- improving the provision of equal opportunities. The female work force has historically been under-represented but is now recognised as a major asset to the country. Vision 2030 sets the goal to increase female participation in the workforce to 30 per cent by 2030.¹⁵

Outside of the oil sector the service sector now accounts for slightly over half of GDP and almost three quarters of the working population, driven predominantly by the tourism and the financial sectors. The Hajj and Umrah pilgrimages bring over 4 million tourists to Saudi Arabia and an estimated US\$12 billion in revenue annually.¹⁶ Industry, still dominated by oil, contributes 47 per cent of GDP and employs roughly a quarter of the population; oil alone single-handedly accounts for 80 per cent of exports and 70 per cent of government revenue. Agriculture accounts for only 2.2 per cent of GDP, employing 2.3 per cent of the working

¹¹ Global Top 100 Companies, PWC, 2021 <https://www.pwc.com/gx/en/services/audit-assurance/publications/global-top-100-companies.html>

¹² Gross Domestic Product 2020, General Authority for Statistics, 2021 <https://www.stats.gov.sa/sites/default/files/Gross%20Domestic%20Product%20annual%202020%20EN.pdf>

¹³ Vision 2030, Kingdom of Saudi Arabia, 2016 <https://www.vision2030.gov.sa/en>

¹⁴ Top 100 largest sovereign wealth funds, Sovereign Wealth Fund Institute, 2021 <https://www.swfinstitute.org/fund-rankings/sovereign-wealth-fund>

¹⁵ Vision 2030, Kingdom of Saudi Arabia, 2016 <https://www.vision2030.gov.sa/en>

¹⁶ Religious tourism a major economic force: 1.8 million pilgrims arrive in Saudi for Hajj, AMEinfo, 08 August 2019.

population. Water scarcity and droughts limit the potential for agriculture and as such it has largely remained undeveloped.

As noted in the previous section, Saudi Arabia has a large population of expatriate workers. Official statistics show that 76 per cent of the country's labour force are overseas citizens, who are employed in a wide variety of roles, from highly skilled technical positions to unskilled and semi-skilled labour.¹⁷ Private sector employment is dominated by non-Saudi workers to an even greater extent.

Recent government policy has aimed to increase the role of Saudis in the economy and especially in the private sector, through means such as increasing taxes on foreign citizens and setting minimum standards for the number of locals employed by companies of different sizes.¹⁸ This led to an outflow of foreign workers, exacerbated during the economic downturn caused by the Covid pandemic.¹⁹ Foreign workers were particularly affected by this downturn as Saudi employers tend to prefer to retain local rather than expatriate staff when making layoffs.²⁰

Unemployment has been a problem in Saudi Arabia for many years. Although the unemployment rate for Saudi citizens has declined greatly since the peak of the pandemic, it still stood at 11 per cent in the second quarter of 2021.²¹ Female unemployment is especially high, standing at 22 per cent among female Saudi citizens, but as with male unemployment this is substantially lower than its level in mid-2020.

Female labour force participation has increased substantially in recent years, increasing by 14 percentage points between 2016 and 2020 as a result of government policies to encourage women to enter the workforce.²² However this level of participation is still low by international standards, with almost two thirds of Saudi women neither working nor looking for work.

The currency of Saudi Arabia is the Saudi Riyal (SAR) pegged to the US Dollar at a fixed exchange rate of 3.75 SAR to 1 USD.

2.3 Government

Saudi Arabia is a hereditary monarchy ruled by the Al Sa'ud family. The Al Sa'ud family has ruled the country since the founding of the Kingdom in 1932 and the current leader is King Salman bin Abdulaziz al-Saud. The King is both chief of state and head of government and

¹⁷ General Authority of Statistics, *Statistical Yearbook 2019* <https://www.stats.gov.sa/en/1006>

¹⁸ https://www.washingtonpost.com/world/saudi-arabia-encouraged-foreign-workers-to-leave---and-is-struggling-after-so-many-did/2019/02/01/07e34e12-a548-11e8-ad6f-080770dcddc2_story.html

¹⁹ Around 1.2 million foreign workers to leave Saudi Arabia, says report, *Al Arabiya*, 2020 <https://english.alarabiya.net/coronavirus/2020/06/16/Coronavirus-Around-1-2-million-foreign-workers-to-leave-Saudi-Arabia-says-report>

²⁰ 'What's the point of staying?': Gulf faces expatriate exodus, *Reuters*, 07 May 2020 <https://www.reuters.com/article/us-health-coronavirus-gulf-jobs-idUSKBN22J1WL>

²¹ Unemployment is much lower for foreign citizens as in most cases their residence rights in Saudi Arabia are linked to their job

²² Why are Saudi women suddenly starting to take jobs?, *Brookings*, 19 May 2021 <https://www.brookings.edu/blog/future-development/2021/05/19/why-are-saudi-women-suddenly-starting-to-take-jobs/>

holds legislative, executive and judicial functions. As the prime minister, the King leads the Council of Ministers, responsible for executive and legislative matters.²³ However, the heir to the throne Crown Prince Mohammed bin Salman commands tremendous influence and is often treated as the de facto leader of the Kingdom.

The Consultative Council, also known as the Shoura Council, consists of 150 members chosen by the king to serve four-year terms. The council has no legislative power and instead plays a role in the discussion and expression of matters of public interest. The discussions of the council inform the political decisions of the royal family and the Council of Ministers.²⁴

There are no elections for national political bodies and political parties are outlawed, although elections are held at the municipal level. Major decisions are however usually made outside of the councils, decided by consensus among the royal family and other prominent leading figures.

Saudi Arabia's legal system is currently based on the interpretation of Islamic sharia law and the Saudi interpretation is notably conservative.²⁵ However, Saudi Arabia announced in February 2021 the coming of major legal reforms and the first steps towards codified law over the course of 2021, which were described as intending to improve the reliability of existing legal procedures.²⁶

Despite recent moves towards social and economic liberalisation, political freedoms in Saudi Arabia are still limited. The Freedom House 2021 Freedom in the World ranking places Saudi Arabia 188th of 195 countries while Reporters without Borders ranks the country 170th of 180 in the 2020 World Press Freedom Index.²⁷ Similarly, although Saudi Arabia has seen major reforms to human rights in the last decade including giving women the right to vote, to live independently, to drive and to obtain passports without needing a male guardian's approval,²⁸ the country remains in the bottom 10 countries in the World Economic Forum's 2021 Gender Gap Index.²⁹ The Saudi government describes the Kingdom's position on gender equality as

²³ The political framework of Saudi Arabia, *Nordea Trade*, March 2021 <https://www.nordeatrade.com/en/explore-new-market/saudi-arabia/political-context>

²⁴ Saudi Arabia – Government and Society, *Britannica*, accessed 01 December 2021 <https://www.britannica.com/place/Saudi-Arabia/Government-and-society> ; Understanding Shoura: how the Saudi consultative 'parliament' works, *Arab News*, 08 March 2019 <https://www.arabnews.com/node/1407076/saudi-arabia>

²⁵ The facts – and a few myths – about Saudi Arabia and human rights, *The Washington Post*, 09 February 2015 <https://www.washingtonpost.com/news/worldviews/wp/2015/02/09/the-facts-and-a-few-myths-about-saudi-arabia-and-human-rights/>

²⁶ Saudi Arabia announces major legal reforms, paving the way for codified law, *CNBC*, 09 February 2021 <https://www.cnbcm.com/2021/02/09/saudi-arabia-announces-legal-reforms-paving-the-way-for-codified-law.html>

²⁷ Freedom in the World, *Freedom House*, accessed 18 March 2021 <https://freedomhouse.org/report/freedom-world> ; Data of Press Freedom Index, *Reporters Without Borders*, accessed 18 March 2021 https://rsf.org/en/ranking_table

²⁸ Important Advances for Saudi Women, *Human Rights Watch*, 2 August 2019 <https://www.hrw.org/news/2019/08/02/saudi-arabia-important-advances-saudi-women>

²⁹ Global Gender Gap Report 2021, *World Economic Forum*, 30 March 2021 <https://www.weforum.org/reports/global-gender-gap-report-2021>

based on Shariah law and “the principle of complementary equality [...] which takes into account the different characteristics of both sexes”.³⁰

Regionally, Saudi Arabia is a member of the Gulf Cooperation Council (GCC), as well as the Arab League and the Organization of Islamic Cooperation (OIC) and is a founding member of OPEC. At the global level, it is a member of the UN, the WTO and the G20.

There are two administrative bodies governing the Saudi education system: the Ministry of Education (MOE), and the Technical and Vocational Training Corporation (TVTC). Higher education was administered separately until 2015, when the Ministry of Higher Education became part of the MOE.³¹

The Ministry of Education (MoE) provides supports and services for Saudi Arabia’s universities and colleges and is responsible for coordinating them to develop in line with national development programmes. It also supervises scholarship provision to Saudi students studying overseas and coordinates university relations, including through cultural mission offices overseas.³²

In 2021 Saudi Arabia announced a package of 89 initiatives under the title of the Human Capability Development Program, representing the Kingdom’s current goals for education reform. The broad goal of the programme is to prepare globally competitive citizens via developing a strong educational base, preparing citizens for local and global education markets, and providing lifelong learning opportunities.

Key goals within this programme include:

- expanding early childhood education
- making K12 education more flexible through initiatives such as specialised high schools and vocational upper secondary schools
- making school education more “innovative and practical”, for example through focusing on basic skills, providing more technology labs and promoting extra-curricular activities
- improving teacher quality and school quality
- upholding the Arabic language while also expanding foreign language proficiency
- enhancing employability of HE graduates, including through reviewing universities’ degree portfolios, engaging employers in curriculum design, introducing a mandatory six-month internship for all HE students, and providing career guidance for students

³⁰ How is equality between men and women achieved under the Kingdom’s laws?, *Kingdom of Saudi Arabia Human Rights Commission*, accessed 21 January 2022 <https://hrc.gov.sa/en-us/HumanRightsInSaudi/Pages/equalityrights.aspx>

³¹ The Emergence of the Ministry, *Ministry of Education Saudi Arabia*, accessed 13 April 2021 <https://www.moe.gov.sa/en/aboutus/aboutministry/Pages/About.aspx>

³² Background Educational System, *Saudi Arabian Cultural Mission to the US*, accessed 01 December 2021 <http://www.sacm.org/ksa/education-in-saudi-arabia/background>

- encouraging HEIs to cooperate with the private sector and with overseas counterparts through research partnerships and student exchange
- encouraging continuous upskilling and lifelong learning

Another key policy related to education is the Future Gate Initiative, which aims to transform the classroom experience through technology such as ‘virtual schools’ and smart classrooms, using projection screens and smart cameras to connect students around the country to outstanding teachers from different regions. The initiative also covers relevant teacher training and certification in the use of digital education technology, and is intended to boost the computational, thinking, creative and programming skills of students.³³

³³ Saudi Arabia V2030: The Education Pillar and the Role of Private Sector, *TETCO*, 27 September 2018
https://millenniumedu.org/wp-content/uploads/2018/10/sem2018_tetco_ppt.pdf

3 Domestic Education Environment

3.1 Overview

Saudi Arabia invests heavily in its education system, spending a considerably higher proportion of its GDP on education than the OECD average. The budget for fiscal year 2021 allocated SAR186 billion to education, equivalent to 19 per cent of the total government budget. This was slightly lower than the budget in 2020 due to funds being diverted to the health sector to tackle the Covid-19 pandemic.³⁴ This investment has contributed to strong improvements in student enrolment and as of 2020 the country now has nearly universal enrolment in primary and secondary education.³⁵

However, education outcomes in Saudi Arabia continue to be poor. Students in the country consistently score below the OECD average in international assessments of reading, mathematics and science. While reading scores are slightly above those of the country's MENA neighbours, over half of students still score below the level required to fully participate in society.

The OECD notes that Saudi Arabia has major inequalities in educational performance between urban and rural students and between those from higher and lower socio-economic backgrounds, to a greater extent than the global average or than other countries in the region. These are linked to the recent expansion of education and high recent population growth, with overcrowded schools in urban parts of the country while those in rural areas lack infrastructure and educational materials.

The recently announced Human Capability Development Program also identified a number of specific challenges facing the Saudi education system. At the basic education level these include (among others) low enrolment in kindergarten education; rigid pathways and limited specialization in secondary education; outdated teaching methods and curriculum; and limited requirements for teacher qualifications. Meanwhile challenges at the higher education level include low alignment between tertiary education outcomes and labour market needs; an overly theoretical approach; low involvement of employers in the education system; and low quality of tertiary institutions as reflected in international rankings.³⁶

3.2 Early years, primary and secondary education

The Saudi school system has grown impressively over recent decades. From being almost non-existent in the early 70s for all but the most influential families, enrolment at all levels of school

³⁴ 2021 KSA Budget, *Ministry of Finance of Saudi Arabia*, 16 December 2020

https://www.mof.gov.sa/en/budget/2021/mediacenter/Documents/NL_En1.pdf

³⁵ Education in Saudi Arabia, *OECD iLibrary*, 06 July 2020 https://www.oecd-ilibrary.org/education/education-in-saudi-arabia_76df15a2-en

³⁶ Human Capability Development Program 2021-2025, *Kingdom of Saudi Arabia*, 2021 https://www.vision2030.gov.sa/media/nfob33q5/hcdp_mv_en-1.pdf

education is now close to universal.³⁷ Saudi Arabia's focus is now shifting to address quality provision but still has hurdles to overcome, especially in the form of underdeveloped regulatory frameworks and continued use of outdated teaching methods.

Saudi Arabia's basic education system follows a 6-3-3 model with six years of compulsory elementary school, three years of middle school (lower secondary) education, and three years of high school (upper secondary) education. Education is compulsory until middle school while public education at the high school level is also free and almost universal among Saudi citizens.³⁸ Upper secondary education is split into three streams: general, religious, and technical-vocational. Students in the general stream specialise in the second year in either science or liberal arts.³⁹

Government education is also available to non-Saudi children, although Saudis are given preference for enrolment. Other forms of education include local private education – which follows the Saudi curriculum and accounts for around 11 per cent of students – and “foreign education” at international schools, which accounts for an additional 6 per cent of students.⁴⁰ Both government schools and private Saudi-curriculum schools segregate male and female students and have a strong emphasis on Islamic instruction as part of the curriculum, while international schools have more flexibility in terms of curriculum and education style.

According to Saudi government statistics, there was a total of 6.3 million students in pre-tertiary education in 2019, of which 3.3 million were enrolled in primary, 1.5 million in intermediate and 1.5 million in secondary. The gender split was approximately even, except at upper secondary level where 54 per cent of enrolments were male students.⁴¹

Saudi Arabia has a low teacher – student ratio, providing students with beneficially small class sizes. On average, there is one teacher for every 13 students across the pre-tertiary system. This is below the global average for both primary and secondary education, which stood at 23 and 17 respectively in 2018.⁴²

The language of instruction in the pre-tertiary system is Arabic. English has historically been introduced as a subject in the higher grades of elementary school, but one of the reforms set out in the recent Human Capability Development Program aims to introduce mandatory English classes from Grade 1 while also introducing options for other relevant languages such as Chinese.⁴³

Despite efforts to reform the curriculum and modernise teaching, policy has not yet translated into change in practice. Teaching is still focussed on rote learning and passing examinations

³⁷ UIS Database, *UNESCO Institute for Statistics*, accessed 12 April 2021 <http://data.uis.unesco.org/>

³⁸ About Saudi Arabia – Education, *The Embassy of the Kingdom of Saudi Arabia Washington DC*, accessed 14 April 2021 <https://www.saudiembassy.net/education>

³⁹ Education in Saudi Arabia, *World Education News + Reviews*, 9 April 2020 <https://wenr.wes.org/2020/04/education-in-saudi-arabia>

⁴⁰ Education and Training, *gov.sa*, accessed 01 December 2021 <https://www.my.gov.sa/wps/portal/snp/aboutksa/EducationInKSA>

⁴¹ Statistical Yearbook 2019, *General Authority of Statistics – Kingdom of Saudi Arabia*, 2020 <https://www.stats.gov.sa/en/1006>

⁴² UIS Database, *UNESCO Institute for Statistics*, accessed 01 December 2021 <http://data.uis.unesco.org/>

⁴³ Human Capability Development Program 2021-2025, *Kingdom of Saudi Arabia*, 2021 https://www.vision2030.gov.sa/media/nfob33q5/hcdp_mv_en-1.pdf

rather than developing skills and thinking. However, the Education and Training Evaluation Commission is in the process of developing a new curriculum framework that promotes not only learning content but also developing skills, critical thinking and creativity.⁴⁴

Schools in Saudi Arabia are evaluated by a system of school supervisors. According to the OECD, despite strict guidelines governing how school supervision should be carried out, supervisors are not always equipped to evaluate schools or provide meaningful support. The current system was described as being more concerned with compliancy than supporting schools to improve quality, and supervisors are often expected to support more teachers than they meaningfully can. However, a new school evaluation framework attempts to remove the responsibilities of supervisors and give them to a new independent body of evaluators.

3.3 Technical & vocational education and training

TVET in Saudi Arabia is administered by the Technical and Vocational Training Corporation (TVTC). The Corporation has laid out a series of main goals for Saudi vocational education: provide access to quality technical and vocational training; develop the skills of trainers and teaching staff; improve partnerships with the labour market; develop an effective framework for vocational training; and carry out a digital transformation of vocational education provision.

There are 260 vocational colleges in total, with the largest concentration in the region around Riyadh. There are also 35 strategic partnership institutions, which are colleges run collaboratively between the TVTC and private sector organisations. Vocational colleges, as with other forms of education in the Kingdom, are segregated by gender; provision for female students remains limited with only 29 technical colleges for girls.

Students at vocational colleges can study towards a diploma on programmes lasting two and a half years. Some colleges offer applied bachelor's degree programmes which require an additional two and a half years of study.⁴⁵

As with many other countries, participation in TVET is generally regarded as less prestigious than academic higher education which is seen as one reason behind the high unemployment rates for Saudi citizens and the dominance of foreign labour in the country. Saudi Arabia's Vision 2030 strategy aims to reduce the stigma of vocational and technical education.⁴⁶ This will be achieved through easing the transfer between higher and vocational education, using marketing campaigns to promote TVET and vocational programmes, developing more effective partnerships with the private sector, and expanding global exchange programmes and entrepreneurship programmes in TVET institutions.⁴⁷

⁴⁴ Education in Saudi Arabia, *OECD iLibrary*, 06 July 2020 https://www.oecd-ilibrary.org/education/education-in-saudi-arabia_76df15a2-en

⁴⁵ Technical & Vocational Training Corporation at a Glance, *Saudi Arabia Technical and Vocational Training Corporation*, December 2020 <https://www.tvtc.gov.sa/pdf/TVTC-at-a-Glance.pdf>

⁴⁶ Vision 2030 and reducing the stigma of vocational and technical training among Saudi Arabian students, *Abdulaziz Salem Aldossari*, 11 April 2020 <https://ervet-journal.springeropen.com/articles/10.1186/s40461-020-00089-6>

⁴⁷ Human Capability Development Program 2021-2025, *Kingdom of Saudi Arabia*, 2021 https://www.vision2030.gov.sa/media/nfob33q5/hcdp_mv_en-1.pdf

3.4 Higher education

The majority of higher education in Saudi Arabia is at the bachelor's degree level, with degrees typically taking four years to complete although some subjects including engineering, medicine and pharmacy have longer durations. Master's degrees in the country take two years of study while PhDs last from three years.⁴⁸

Public institutions are free for nationals and provide students with free books and healthcare.⁴⁹ The Kingdom also provides full scholarships for international students, provided they meet certain admission requirements.⁵⁰ Admission to undergraduate programmes is based on a combination of three indicators, including the student's secondary school grade point average (GPA), an aptitude test (GAT or Quodorat) and a curriculum-based standardised test (SAAT or Attehseeli); weighting of these tests varies by institution but in general the SAAT is the most important.⁵¹

Data from UNESCO shows that Saudi Arabia has a high participation rate in higher education, with a gross tertiary enrolment ratio of 71 per cent in 2020, five percentage points higher than the most recent figure for the UK. Enrolment in higher education has grown very rapidly in recent years, with the enrolment ratio nearly doubling compared to 2010 and more than three times higher than the level 20 years ago.⁵²

As of November 2021 the country had 29 public universities and 36 private HEIs institutions.⁵³ However, publicly funded HEIs are much larger than their private counterparts on average. Government statistics show that, of the 1.64 million students studying HE courses in Saudi Arabia in 2019, more than 1.37 million – or roughly 84 per cent – were studying at public universities. Most of the rest were enrolled on sub-degree HE programmes with the General Organization for Technical and Vocational Training, a public institution without university status. Private HEIs are much smaller, accounting for only 5 per cent of total HE students; they also tend to focus on a limited number of subjects such as business and economics.⁵⁴

Despite the large scale of undergraduate provision, postgraduate places are much more limited. Only a little over 54,000 students in the country, or roughly one in 30 HE students, were studying postgraduate programmes in 2019. The scale of sub-degree HE is also comparatively limited with only around 250,000 students, less than a fifth of the number studying bachelor's degrees. As noted in the following section postgraduates make up a comparatively larger share

⁴⁸ <https://www.sacm.org/ksa/education-in-saudi-arabia/higher-education>

⁴⁹ About Saudi Arabia – Education, *The Embassy of the Kingdom of Saudi Arabia Washington DC*, accessed 14 April 2021 <https://www.saudiembassy.net/education>

⁵⁰ Scholarships in State Universities, *Ministry of Education Saudi Arabia*, accessed 01 December 2021

<https://www.moe.gov.sa/en/education/ResidentsAndvisitors/Pages/PublicUniversitiesScholarships.aspx>

⁵¹ Saudi Arabia: Moving high-stakes examinations online with AI technology, *OECD*, 02 September 2020 <https://oecdeditoday.com/wp-content/uploads/2020/09/Saudi-Arabia-High-stakes-examinations-and-AI.pdf>

⁵² UIS Database, *UNESCO Institute for Statistics*, accessed 01 December 2021 <http://data.uis.unesco.org/>

⁵³ State Universities, *Ministry of Education*, accessed December 01 2021

<https://www.moe.gov.sa/en/education/highereducation/Pages/UniversitiesList.aspx> ; Private Universities, *Ministry of Education*, accessed December 01 2021

<https://www.moe.gov.sa/en/education/highereducation/Pages/PrivateUniversity.aspx>

⁵⁴ Statistical Yearbook 2019, *General Authority of Statistics – Kingdom of Saudi Arabia*, 2020

<https://www.stats.gov.sa/en/1006>

of Saudis studying abroad, which may point towards unmet demand for locally-delivered postgraduate courses.

In contrast to the basic education system, most universities in the country are co-educational and the majority of HE students in Saudi Arabia are now female. This is particularly true at the bachelor's degree level, where more than 60 per cent of graduates in 2019 were female – female students are both more likely to enter university and also have higher graduation rates. In contrast the numbers of male and female postgraduate students are almost equal while a substantial majority of students on sub-degree programmes are male.

One key gender difference between Saudi Arabia and Western countries is that Saudi women are more likely to study STEM subjects. Local media reports that female graduates outnumbered males in key STEM subjects including biology, IT, mathematics and statistics, and physics, although employment was still a challenge.⁵⁵

Improving the quality of the country's universities is still an important aim for the country's education authorities. The Vision 2030 strategy originally aimed to have five universities in the global top 200 by 2030, and has already achieved some success towards this goal – one Saudi university is ranked in the top 200 according to the 2022 Times Higher Education World University Rankings while the most recent QS ranking places two of the country's HEIs in the global top 200.⁵⁶ As a result, the Human Capability Development Program, announced in 2021, has set a more ambitious goal of having six universities in the global top 200 and one in the top 100 by 2025.⁵⁷ Saudi Arabia is also home to some of the most renowned Islamic universities in the world, including the Al-Imam Mohammed Ibn Saud Islamic university.⁵⁸

According to Scimago, researchers in Saudi Arabia produced 36,301 citeable documents in 2020, placing the country 25th globally in terms of academic research output.⁵⁹ This represents a substantial improvement compared to a decade earlier when the country was ranked 46th globally with only 6,188 papers. Saudi research involves a great deal of international collaboration compared to most other countries worldwide; according to data from Elsevier SciVal more than 72 per cent of papers published by Saudi researchers over the last five years involved an overseas co-author with the UK being the country's 6th largest collaborator.

⁵⁵ How Saudi women are getting ahead of men as STEM graduates, *Arab News*, October 2018

<https://www.arabnews.com/node/1469381/saudi-arabia>

⁵⁶ World University Rankings 2022, *Times Higher Education*, 2021 (sic)

<https://www.timeshighereducation.com/world-university-rankings/2022/world-ranking> ; QS World University Rankings 2022, *QS TopUniversities*, 2021 (sic) <https://www.topuniversities.com/university-rankings/world-university-rankings/2022>

⁵⁷ Human Capability Development Program 2021-2025, *Kingdom of Saudi Arabia*, 2021

https://www.vision2030.gov.sa/media/nfob33q5/hcdp_mv_en-1.pdf

⁵⁸ Education in Saudi Arabia, *World Education News and Reviews*, 9 April 2020

<https://wenr.wes.org/2020/04/education-in-saudi-arabia>

⁵⁹ Scimago Journal & Country Rank, *Scimago*, 2021 <https://www.scimagojr.com/countryrank.php?year=2020>

4 International Education

4.1 Student mobility

According to estimates from UNESCO, Saudi Arabia was the world's 15th largest sender of internationally mobile tertiary students in 2019.⁶⁰ This represents a decline from 11th place the previous year and 5th place in 2014 according to the same source but is still impressive compared to the relatively small size of the country – among countries with a smaller population, only Nepal, Kazakhstan and Syria were estimated to have more students studying abroad.

Saudi Arabia's own data gives a higher figure for students studying overseas, with a total of over 100,000 students abroad including at least 76,000 HE students.⁶¹ Bachelor's degree students make up the largest share of the total, with a little over 45,000 overseas students at this level, but the proportion of postgraduates is much higher than among the domestic student population – master's degrees and PhDs account for 15 per cent and 13 per cent of Saudi students overseas, compared to a combined 3 per cent of students within Saudi Arabia itself. Meanwhile the country also sends a large number of students overseas for language courses, accounting for around 17 per cent of students studying abroad in 2019.

A large proportion of Saudi students abroad are funded by scholarships. According to data from Saudi Arabia's General Authority for Statistics, over 90 per cent of HE students studying abroad are funded by scholarships along with more than 60 per cent of language students. The most notable of these schemes is the Custodian of The Two Holy Mosques Scholarship Programme – formerly known as the King Abdullah Scholarship Programme – which launched in 2005. The programme funds students studying for overseas bachelor's, master's and doctorate degrees in disciplines considered to meet the demands of the Saudi labour market by developing its highly skilled work force.⁶² The Scholarship Programme includes multiple tracks including the elite universities track, the medical track, the international scholarship track, and the excellence track, while recently introduced specialisations include artificial intelligence, cybersecurity, air transport, and health specialties.

Although this scholarship continues to run, the government cut funding for the programme heavily in 2016. Alongside reduced funding availability the government set tougher eligibility requirements and shifted the focus of the programme to align more closely with labour market needs.⁶³ The number of scholarship-funded students was also reduced by limiting "attachment scholarships" – which allowed students who had independently travelled abroad to apply for a

⁶⁰ UIS Database, *UNESCO Institute for Statistics*, accessed 01 December 2021 <http://data.uis.unesco.org/>

⁶¹ Statistical Yearbook 2019, *General Authority of Statistics – Kingdom of Saudi Arabia*, 2020 <https://www.stats.gov.sa/en/1006>. The figure above for HE students excludes several thousand whose level of study is labelled as "other" as well as language and school-age students.

⁶² The Custodian of The Two Holy Mosques Scholarship Program, *gov.sa*, 28 March 2021 <https://www.my.gov.sa/wps/portal/snp/aboutksa/nationalDevelopmentPlans/download/The%20Custodian%20of%20The%20Two%20Holy%20Mosques%20Scholarship%20Program/>

⁶³ Report: Saudi scholarship programme to sharpen focus on top universities, *ICEF Monitor*, 10 February 2016 <https://monitor.icef.com/2016/02/report-saudi-scholarship-programme-to-sharpen-focus-on-top-universities/>

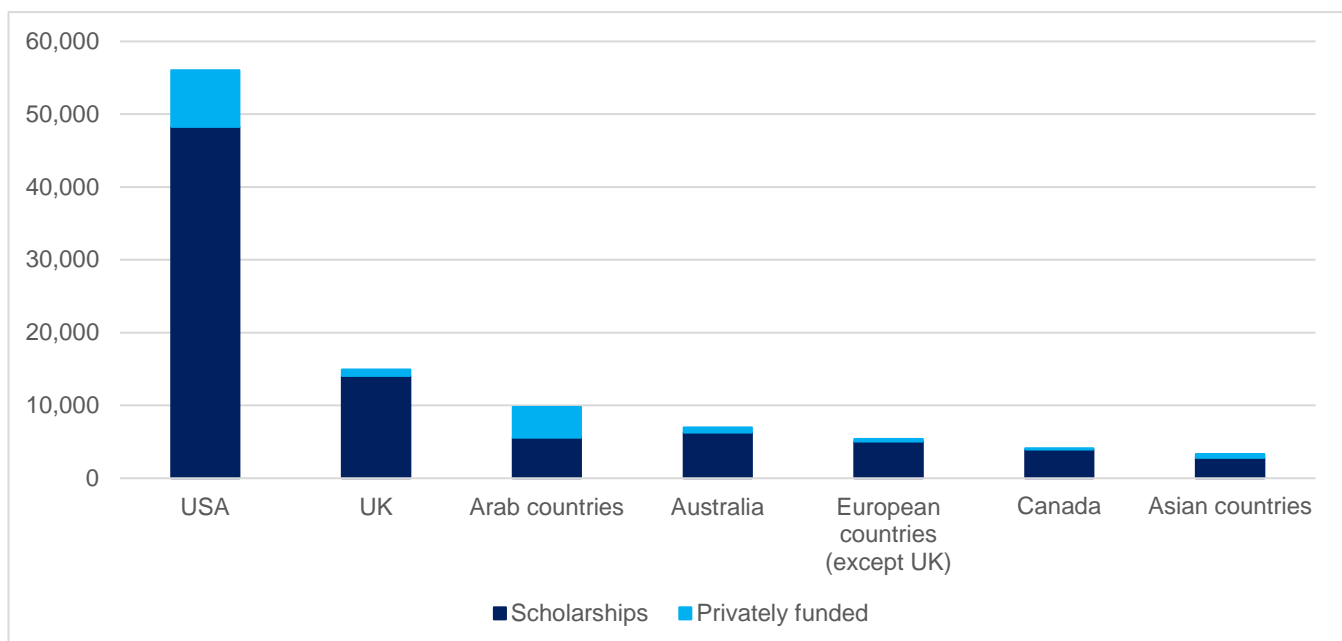
scholarship from their country of study – to only cover students at the top 100 universities worldwide, while in the early 2010s the MoE reviewed its policies to avoid a “clustering” of students in certain countries and universities and to make sure that student numbers reflected the capacity that the destination country could accommodate without market saturation.

More recent years have seen scholarships in Saudi Arabia become more decentralised and fragmented, and this trend is expected to continue. A larger share of scholarships are now provided by ministries other than the Ministry of Education, as well as major state-owned companies like Saudi Aramco. Saudi universities also now have the authority to offer their own scholarships rather than these being managed by the Ministry of Education. As of 2021 there were more than 100 individual scholarship programmes currently in place in Saudi Arabia.

Data from official Saudi statistics shows that the US is by far the most popular destination for Saudi students overseas, accounting for more than half of both scholarship-funded and self-funded students studying abroad in 2019. The UK was the second most common destination, with almost 15,000 students at all levels.⁶⁴

Most of the Saudi students in the UK were reported as being funded by scholarships, while Arab countries made up a larger proportion of privately funded students. Official statistics do not break this down further but data from UNESCO shows that Bahrain and Jordan are the top regional study destinations for Saudi students.⁶⁵ In contrast to domestic student numbers, male students account for a large majority of students studying abroad among both scholarship-funded and privately funded groups.

Figure 4: Destinations of scholarship funded and privately funded Saudi students overseas, 2019



Source: General Authority for Statistics, Kingdom of Saudi Arabia

⁶⁴ Statistical Yearbook 2019, *General Authority of Statistics – Kingdom of Saudi Arabia*, 2020

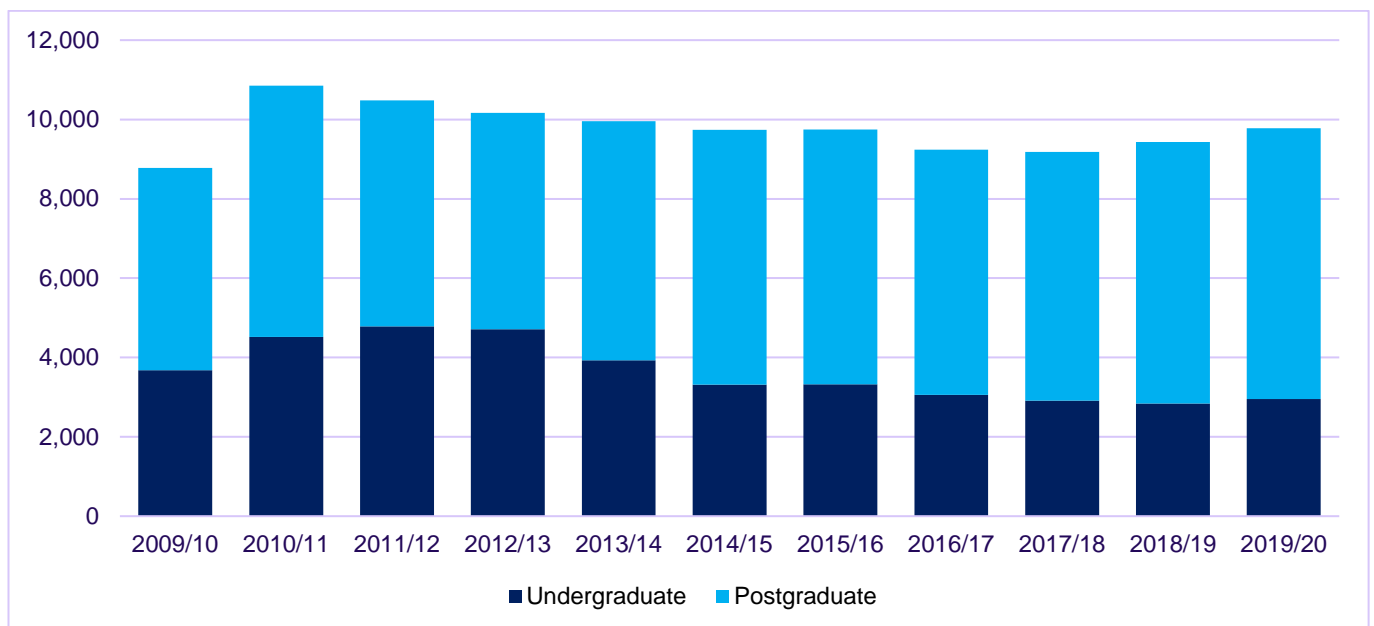
<https://www.stats.gov.sa/en/1006>

⁶⁵ UIS Database, *UNESCO Institute for Statistics*, accessed 01 December 2021 <http://data.uis.unesco.org/>

Data from UK sources shows that almost 10,000 Saudi students were studying in UK HEIs in the 2019/20 academic year. The main reason for the gap between UK and Saudi sources is that Saudi data includes programmes at all levels, including short-term language programmes.

After rapid growth in Saudi enrolments at UK institutions between 2008/09 and 2010/11, numbers gradually fell between 2010/11 and 2016/17. The decline was mainly concentrated among undergraduate students and may be related to the introduction of stricter rules regarding the issuance of Tier 4 student visas in 2011. In 2016/17, the tightening of funding for scholarship programmes added an extra hit to the inflow of Saudi students to the UK. Enrolments started to rise again in 2018/19, but as the following student visa figures show, growth is unlikely to continue in the short-term due to the continuing global Covid-19 pandemic.

Figure 5: Saudi Arabia domiciled students enrolled on HE programmes in the UK



Source: HESA

As well as the increasing share of postgraduate students – who made up 70 per cent of Saudi enrolments in the UK in 2019/20 – another noticeable trend in Saudi student mobility has been an increasing focus on highly-ranked universities. More than half of Saudi Arabia domiciled HE students in the UK were studying at Russell Group institutions in the 2019/20 academic year, compared to just 31 per cent five years earlier. This is related to reforms to Custodian of The Two Holy Mosques scholarships in 2015 that introduced an “elite universities track” as a major part of the programme.

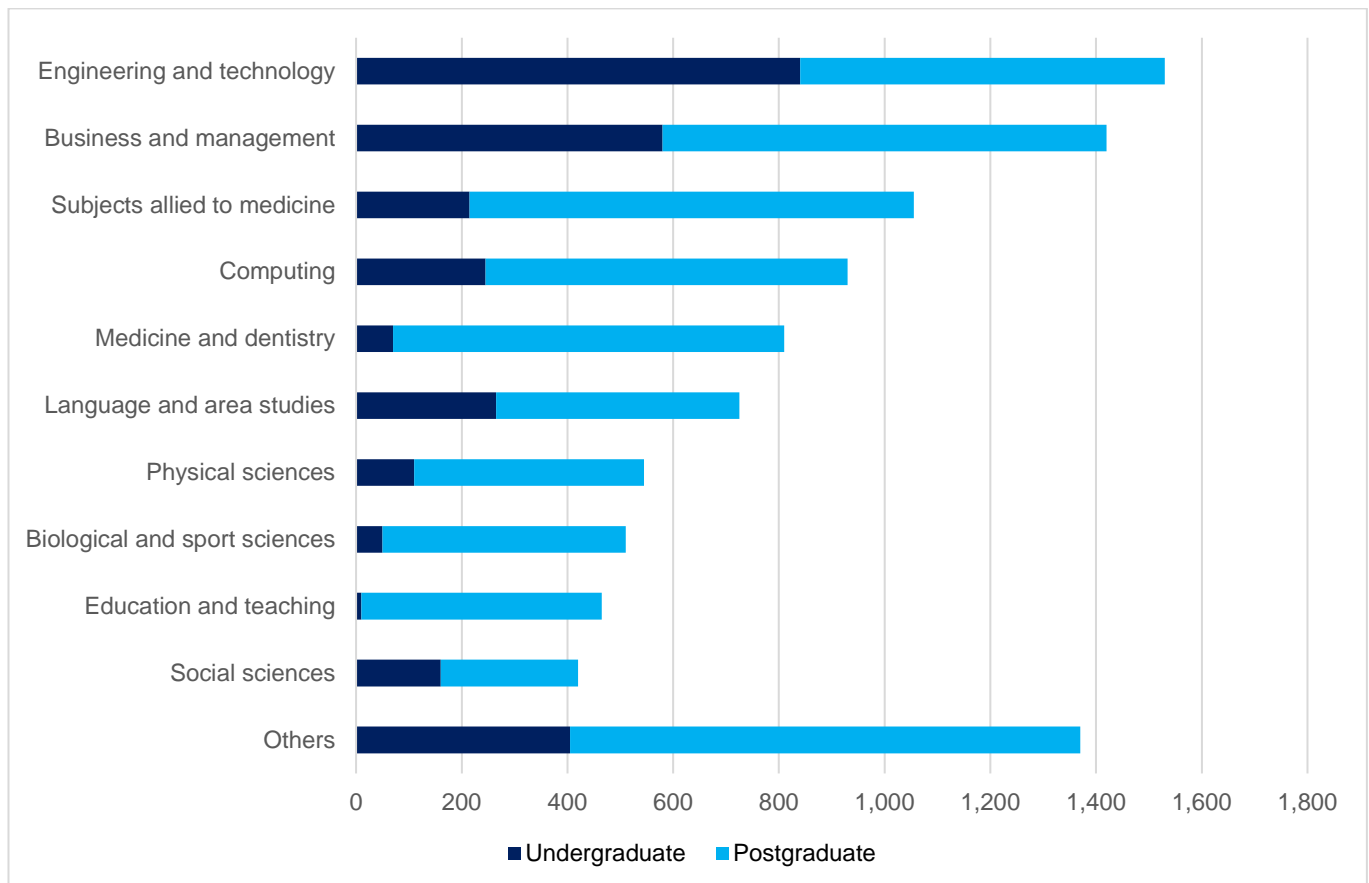
More recent data shows that the UK saw a massive drop in student mobility from Saudi Arabia in 2020, as with most other parts of the world, as a result of the Covid-19 pandemic. Tier 4 student visa issuances dropped by 35 per cent in 2020 while short-term study visas fell to almost zero after the first quarter of the year. Statistics for 2021 show that visa issuances have recovered to some extent but were still around 8 per cent below the 2019 figure.

Saudi Arabia domiciled students in the UK study a variety of different subject areas, with no single field dominating. Engineering and technology was the most popular broad subject area in

2019/20 with a total of 1,530 students, but this only makes up around 16 per cent of the overall total.⁶⁶

The next most popular broad field is subjects related to business and management, followed by subjects allied to medicine such as pharmacy, biomedical sciences and nursing. If students are broken down by level of study, engineering & technology is particularly popular among undergraduates while it is only the 4th most popular field among postgraduate students.

Figure 6: Subjects studied by Saudi HE students in the UK, 2019/20 academic year



Source: HESA

Compared to five years earlier there has been a substantial decrease in Saudi students studying business-related programmes in the UK, as well smaller declines in computing and engineering programmes. In contrast there has been a large increase in the number of Saudi students studying medicine and subjects allied to medicine.

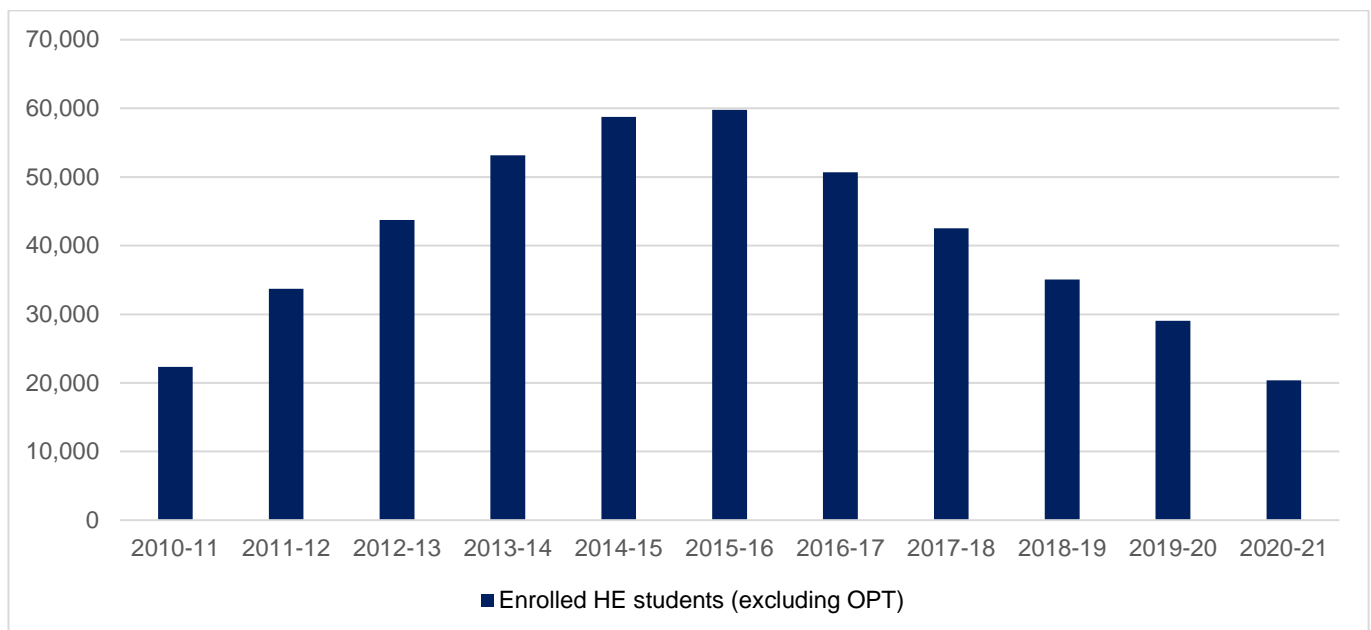
While male students still make up a majority of Saudi students studying in the UK, the number of female students has increased substantially over time. In the 2019/20 the proportion of female students from Saudi Arabia reached 45 per cent, compared to only 24 per cent a decade earlier. This is a more even gender balance than other major destinations, with 68 per cent of all overseas Saudi students worldwide being male. The UK is seen as an attractive destination for female students because of its safety as well as its relative proximity to Saudi Arabia compared with other major overseas study destinations like the US or Australia.

⁶⁶ HESA, 2020. Subject areas refer to CAH1 subject area classifications.

In contrast with some other countries in the region the overwhelming majority of students coming from Saudi Arabia to the UK are Saudi nationals. Only around 11 per cent of Saudi Arabia domiciled students are non-citizens, most of whom have Pakistani, Egyptian, UK or Jordanian passports.

While the US is still the top study destination for Saudi students, the number of students studying in the country has declined greatly over the last five years. Student numbers in 2019/20 were already less than half of the number studying in the US in the 2015/16 academic year, while the Covid-19 pandemic was the main driver behind a further 30 per cent year-on-year decline in 2020/21.⁶⁷

Figure 7: Saudi HE enrolments in the US



Source: HESA

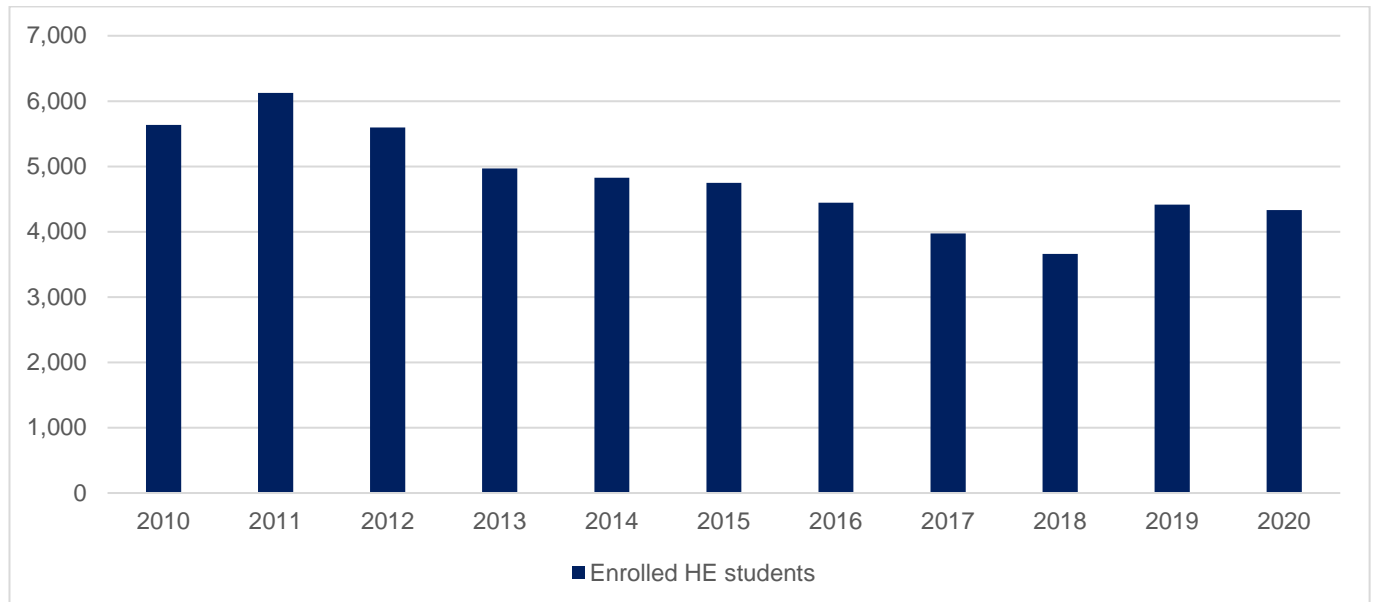
Pre-Covid trends in the US were closely related to trends in Saudi government scholarships, with rapid growth between 2008/09 and 2014/15 linked to expansion of the KASP scholarship programme while a decline after 2015/16 was linked to the government scaling back its funding for this scheme. Reforms to scholarship schemes also tightened requirements for approval – for example, the Saudi cultural bureau in the US was previously able to approve scholarships directly (while equivalent bodies in other countries were not able to do so), but this is no longer the case.

Anti-immigration rhetoric under President Trump from 2016 to 2020 also contributed to this drop. Although Saudi Arabia was not included in Trump's ban of students from several Muslim-majority countries, the policy damaged perceptions of the US across the Muslim world and enrolments dropped in several countries with large Islamic populations that were not included in the ban.

⁶⁷ Academic Level and Places of Origin, *IIE Open Doors*, 2021 <https://opendoorsdata.org/data/international-students/academic-level-and-places-of-origin/>

As with the UK and the US, Australia saw strong growth in the late 00s as a result of increases in government scholarship funding, but the period from 2011 to 2018 saw a steady decline, with the number of Saudi HE students in Australia falling from over 6,100 to less than 3,700.

Figure 8: Saudi HE enrolments in Australia



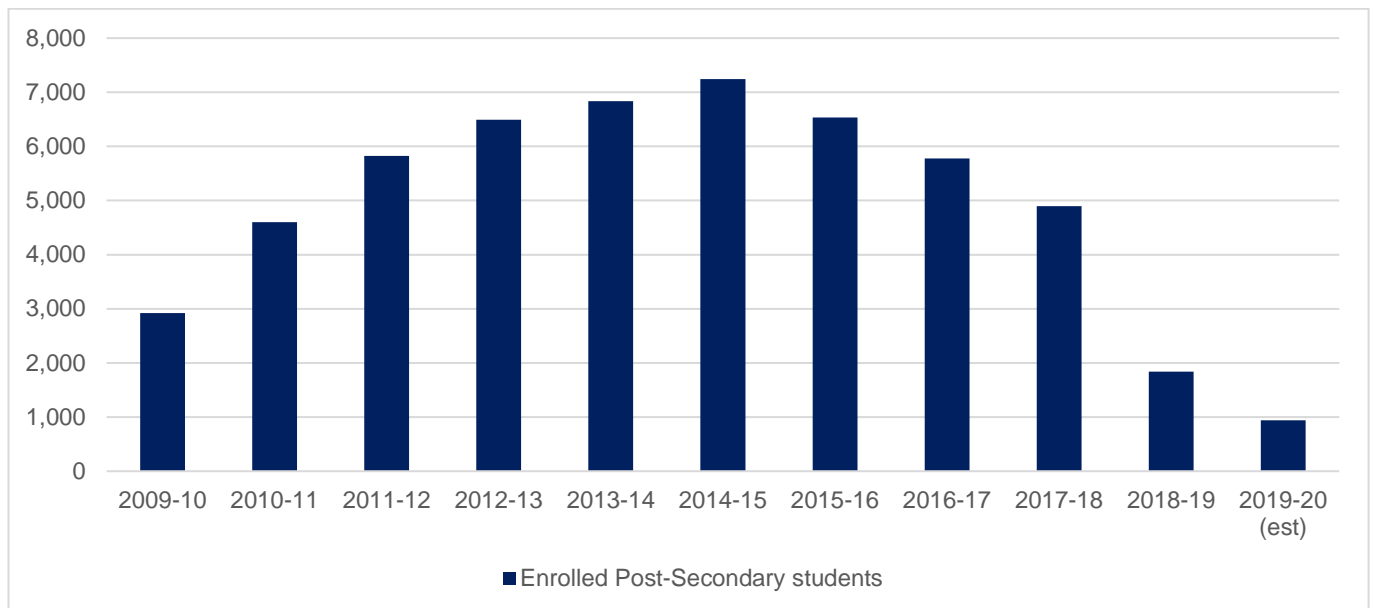
Source: AusTrade

Student numbers in Australia increased somewhat from 2019, in line with an increase in the UK in the 2018/19 academic year onwards. This trend may be linked to fewer Saudi students wishing to study in the US after a ban on students from certain Muslim-majority countries was introduced in mid-2018. However early data from 2021 shows a substantial drop in Australia's international student numbers as a result of the Covid-19 pandemic.

Data for Saudis studying abroad in Canada roughly mirrors the trend for the US until 2018. Student numbers grew strongly until 2014/15 before turning to decline as a result of scholarship cuts.

In 2018 the number of Saudi students studying in Canada dropped sharply as a result of a diplomatic dispute between the two countries. Saudi authorities withdrew scholarship-funded students from Canadian universities and advised self-funded students to leave after Canada's Foreign Affairs Minister criticised the country's crackdown on civil society and women's rights activists.⁶⁸ Data on study permit holders suggests a continued decline in 2019/20 as students completing their programmes were not replaced by new Saudi students.

⁶⁸ Saudi removal of students from Canada is 'warning shot' to US and UK, *Times Higher Education*, 10 August 2018 <https://www.timeshighereducation.com/news/saudi-removal-students-canada-warning-shot-us-and-uk>

Figure 9: Saudi HE enrolments in Canada

Source: StatCan (to 2018-19); British Council estimate based on data from StatCan and Immigration, Refugees & Citizenship Canada (2019-20)

As well as being a major source of international students overseas, Saudi Arabia also hosts a large number of international students itself, with 73,200 international students in 2019 according to UNESCO.⁶⁹ However these statistics are based on citizenship rather than domicile, and no data is available on the breakdown between mobile international students and resident non-citizens.⁷⁰

International students in the country mainly come from Saudi Arabia's neighbours and other Muslim-majority countries. Yemen was the largest source of non-Saudi students in 2019, with around 20,800 students studying in the country, followed by Syria with around 9,100 students. Palestine, Egypt and Jordan were the next largest sources of international students in Saudi Arabia, with around 5,600, 4,800 and 3,000 students respectively.

Saudi Arabia offers scholarships for both resident non-citizens and for international students wishing to study in public universities, which cover both tuition fees and other expenses such as healthcare, travel and financial stipends. Each university has different regulations and conditions governing applications.⁷¹

Trends over time show that international student numbers in Saudi Arabia have fallen slightly over the last few years and are currently 8 per cent below peak international enrolments in 2016. Anecdotal evidence suggests that the decline of the Saudi scholarships programme has been mirrored with a decreasing focus on scholarships for inbound students, although no statistics are available.

⁶⁹ UIS Database, *UNESCO Institute for Statistics*, accessed 01 December 2021 <http://data.uis.unesco.org/>

⁷⁰ Education in Saudi Arabia, *World Education News and Reviews*, 9 April 2020

<https://wenr.wes.org/2020/04/education-in-saudi-arabia>

⁷¹ Scholarships, *Saudi Arabian Cultural Mission*, accessed 08 April 2021 <https://sacm.org.au/scholarships/>

4.2 Transnational education and distance learning

Statistics from HESA show that Saudi Arabia is one of the leading host countries for students studying UK HE programmes overseas, with a total of 8,890 transnational education students in the 2019/20 academic year – an increase of 17 per cent compared to five years earlier.⁷² This places Saudi Arabia 12th among all overseas countries.

More than three quarters of these students are studying for degrees from the Open University via that institution's partnership with the Arab Open University (AOU), a regional distance learning provider which operates across nine different countries in the Middle East and North Africa. These courses award both an OU and AOU degree and are taught in English, but all teaching is delivered by AOU staff.⁷³

UK programmes taught by the Saudi branch of the AOU include undergraduate degrees in subjects related to business, information technology and English language and literature. The university also has a small number of students studying on an Arabic-medium programme that only awards an AOU degree, while the Open University in the UK also supports the AOU with consultancy and licensing of learning materials.

Distance learning degrees taught directly by overseas universities are not officially recognised in Saudi Arabia, which means that graduates who study this type of programme cannot use their degree to apply for work in the public sector.⁷⁴ However these qualifications are commonly accepted by private sector employers and in the 2019/20 academic year more than 1,700 students in Saudi Arabia were studying for UK distance learning qualifications taught by the UK institution. A large majority of these students were studying on master's degree programmes, which may be related to the lack of OU-AOU dual degree provision at this level.

In contrast the number of students studying for UK HE qualifications through in-person partnerships is far lower, with HESA data showing that only around 200 students – or 2 per cent of total TNE participants – were enrolled on UK HE courses in Saudi Arabia other than distance learning or the OU-AOU partnership.

Recent government policies suggest that the number of in-person TNE students in Saudi Arabia could expand in the future. In December 2019 the country's government passed new legislation allowing foreign universities to set up branch campuses for the first time, as well as increasing autonomy for local HEIs and allowing them to set up their own campuses abroad. This indicates a significant shift in the Kingdom's policies towards TNE, as the Shoura Council rejected a proposal to allow foreign campuses four years earlier in 2015.⁷⁵

⁷² This comparison excludes students registered through a partnership between Oxford Brookes University and the ACCA professional accountancy body, who were not included in the most recent HESA data.

⁷³ AOU-OU Partnership, *Arab Open University*, accessed 01 December 2021

<https://www.arabou.edu.sa/partnerships/ou/Pages/default.aspx>

⁷⁴ Guide to Recognition Issues in International Distance Learning, *UK NARIC*, December 2020

<https://ecctis.com/documents/Guide%20to%20Recognition%20Issues%20in%20International%20Distance%20Learning%202nd%20edition.pdf>

⁷⁵ Shoura says no to foreign universities in Kingdom, *Arab News*, 21 May 2015 <https://www.arabnews.com/saudi-arabia/news/749846>

The new legislation established a new university regulator, the Universities Affairs Council (UAC), which replaced the former Higher Education Council and will have powers to set regulatory requirements for foreign universities operating in the country as well as for local higher education institutions.⁷⁶ In addition to meeting these requirements, foreign universities intending to establish branch campuses must also receive approval from the country's cabinet which will be based on the recommendation of the UAC.

The UAC has not yet published detailed policies on its requirements for foreign branch campuses and no branch campuses had been announced as of December 2021. However, the plan has not been abandoned and the Human Capability Development Program announced in September 2021 included an initiative to “develop a framework to attract leading international universities and vocational institutions to open campuses in KSA”.⁷⁷ The new initiative will also encourage institutions to offer joint degrees.

Below the higher education level, Saudi Arabia is home to a large number of international schools. At least 104 international schools operate in the country,⁷⁸ enrolling around 6 per cent of primary and secondary students.⁷⁹

Most of these students are the children of foreign citizens living or working in the country. In general Saudi citizens are not allowed to enrol at international-curriculum schools although there is a limited exception for students who recently returned from living abroad. These students cannot continue to study at international schools indefinitely but must be re-assessed on a yearly basis to see if they are able to re-join the local system.⁸⁰

⁷⁶ Saudi Arabia passes new Universities Bylaw, *PWC*, December 2019

<https://www.pwc.com/m1/en/services/tax/me-tax-legal-news/2019/saudi-arabia-passes-new-universities-bylaw.html>

⁷⁷ Human Capability Development Program 2021-2025, *Kingdom of Saudi Arabia*, 2021

https://www.vision2030.gov.sa/media/nfob33q5/hcdp_mv_en-1.pdf

⁷⁸ International Schools in Saudi Arabia, *International School Search*, accessed 01 December 2021

<https://www.internationalschoolsearch.com/international-schools-in-saudi-arabia>

⁷⁹ Education Indicators, *Ministry of Education*, 2021

<https://www.moe.gov.sa/en/knowledgecenter/dataandstats/pages/educationindicators.aspx>

⁸⁰ Education and Training, *gov.sa*, accessed 01 December 2021

<https://www.my.gov.sa/wps/portal/snp/aboutksa/EducationInKSA>

5 UK Cooperation

In March 2018, the United Kingdom and the Kingdom of Saudi Arabia formed a Strategic Partnership Council to oversee cooperation in a wide range of fields, including education which is included under the Economic and Social Pillar of this agreement. A UK-KSA Education Partnership agreement was signed as part of this cooperation, with short-term priorities including training and development in special education needs and vocational education and training.⁸¹

As of mid-2021, achievements under this partnership included sharing knowledge on special educational needs and disability; introducing Saudi partners to UK private schools; supporting the establishment of a branch of a UK independent school in Riyadh; delivering vocational training to 4,000 students in cooperation with Saudi Arabia's Colleges of Excellence; and holding workshops between UK and Saudi universities looking at the UK's research framework, best practices for impact research, innovation and transnational education.⁸² In March 2021 the British Council arranged a higher education leaders' round-table discussion to create links and foster institutional collaboration between the UK and Saudi Arabian higher education institutions through sharing policy, knowledge and best practices.⁸³

Another large-scale example of educational cooperation between the UK and Saudi Arabia is the Arab Open University. This university teaches distance learning programmes based on curriculums from the UK's Open University, with students receiving both UK qualifications and local degrees. The Arab Open University operates across a number of Arab countries with its Saudi Arabian branch enrolling more than 6,000 students in the 2019/20 academic year.

⁸¹ United Kingdom and Kingdom of Saudi Arabia Strategic Partnership: joint statement (Economic and Social Pillar), *gov.uk*, 15 July 2021 <https://www.gov.uk/government/publications/united-kingdom-and-kingdom-of-saudi-arabia-strategic-partnership-joint-statement-economic-and-social-pillar/united-kingdom-and-kingdom-of-saudi-arabia-strategic-partnership-joint-statement-economic-and-social-pillar>

⁸² Saudi-British Educational Partnership, *Al-Riyadh Newspaper*, July 2021

⁸³ UK-KSA Higher Education Leaders Roundtable, *British Council*, March 2021 <https://education-services.britishcouncil.org/sites/siem/files/field/file/news/HE%20Roundtable%20Programme%20outline.pdf>