

Educating for Inclusion: UK Independent Schools and Special Educational Needs in Saudi Arabia

Thursday 2nd April 2026 | 12:45 – 15:30
Royal Embassy of Saudi Arabia, London

Followed by Networking Reception

Hosted by the Saudi British Joint Business Council in partnership with the Royal Embassy of Saudi Arabia

Context

Saudi Arabia's private K-12 education market is valued at USD 13.26 billion in 2025 and projected to reach USD 23.63 billion by 2030. ^[10] As it stands, the British curriculum programmes hold the largest share at 33.38% of private schools in Saudi Arabia, showing the clear demand for the expertise and reputation of the UK education sector, institutions, and operations. ^[10] The Kingdom needs over 70,000 new school seats and is targeting 1,200 new private schools by 2030, ^[6] with private sector investment across education estimated at SAR 90 to 120 billion, while by 2035 the Kingdom is expected to need 214,000 new private school seats. ^[6] Under Vision 2030 and the Human Capability Development Program, ^[19] Saudi Arabia is actively seeking international schools that bring both academic excellence and specialist capabilities in areas including special educational needs and disabilities (SEND).

Saudi Arabia has identified SEND as a national priority. The 2022 Population and Housing Census reported that 5.1% of the population (approximately 1.35 million individuals) experience disabilities. ^[14] The Ministry of Education's National Transformation Program set a target to increase the number of students with disabilities receiving educational services from 77,575 to 200,000. ^[9, 21] The Kingdom is transitioning from segregated special education institutes toward inclusive mainstream education, creating direct demand for the expertise that UK independent schools and UK SEND Specialist Institutions hold. ^[3, 9]

The bilateral relationship between the UK and Saudi Arabia continues to strengthen, with major announcements likely in the coming months. UK-Saudi trade in goods and services reached £17.2 billion in the year to June 2025, with UK services exports growing by over 27%. ^[6] The Prince of Wales visited Riyadh in February 2026, the latest in a series of high-level engagements that have generated over £10 billion in UK-Saudi trade and investment agreements in under 18 months. ^[6] The UK-GCC Free Trade Agreement is at an advanced stage, with education identified as a priority sector. The agreement includes provisions on licensing transparency and recognition of professional qualifications, which would directly support the mobility of SEND specialists and other educators between the UK and Saudi Arabia. ^[8]

This roundtable brings together UK independent and SEND specialist school leaders with Saudi Embassy officials, the SBJBC and their members to examine the opportunity, address practical questions, and identify pathways for schools considering the Saudi market.

Programme

12:45 – 13:15 **Arrival and Registration (30 mins)**

13:15 - 13:30 **Welcome and Opening Remarks (10 mins)**

Opening address from the Royal Embassy of Saudi Arabia and the Saudi British Joint Business Council (SBJBC). Setting the context for why Saudi Arabia is actively seeking UK independent schools with SEND expertise, and why this roundtable matters for both countries in regard to the expansion of international campuses.

13:30 - 13:50

SBJBC and Pinsent Masons Presentation: SEND Education in Saudi Arabia and Entering the Market (20 mins)

Robert McNamara, Head of Research at SBJBC, presents findings from the SBJBC article on SEND provision in Saudi Arabia. The presentation covers Saudi Arabia's current SEND provision, the gap between policy ambition and current delivery, and the scale of demand facing the Kingdom.

[Virtual] Dr. Sairah Narmah-Alqasim, Partner at Pinsent Masons will discuss the process and requirements from the Saudi Arabian perspective, piecing together for the attendees how to practically enter and explore the Saudi market, turning the opportunity into reality.

13:50 - 14:10

The Saudi Education Market: Scale, Structure, and Opportunity (20 mins)

A briefing on the practical realities of the Saudi K-12 private education market for schools considering entry.

Topics covered:

- Market size: The Saudi private K-12 market is valued at USD 13.26 billion in 2025, projected to reach USD 24.81 billion by 2031 at a 11.02% CAGR.^[10] Private sector investment needed across education, from early years through to higher education and vocational training, is estimated at SAR 90 to 120 billion.^[6] The Kingdom needs over 70,000 new school seats and is targeting 1,200 new private schools by 2030.^[6] L.E.K. Consulting projects that 900 to 1,000 additional private international schools will be needed by 2030 to meet rising demand; others project upwards of 1,200.^[4, 11]

- Demand for British curriculum: British programmes hold the largest share of private schools at 33.38% in 2024.^[10] PIF-backed developers are building purpose-built campuses for British schools. In February 2026, ROSHN Group (PIF-owned) announced a 36,300 square metre campus for King's College Riyadh inside the SEDRA community, opening Q3 2027.^[2, 12] ROSHN is integrating schools into residential mega-developments across the Kingdom alongside the National Housing Company.^[12] Schools already operating include King's College, Reigate Grammar, Aldenham, Downe House, Beech Hall, Buckswood in Riyadh, and Sherborne in Jeddah (opened August 2025).^[5, 20]

- Government support: The Royal Commission for Riyadh City (RCRC) International Schools Attraction Programme has facilitated 8 international schools with over 8,500 seats.^[7] The RCRC coordinates across the Ministries of Education, Investment, and Human Resources. Incentives include government-allocated land, co-education permitted up to Grade 6, flexibility on academic calendars, dedicated visa processing, connections to local investors and operators, and market intelligence on demand and demographics.^[5, 13]

- Saudisation: International curriculum schools are exempt from the 50% Saudi teacher quota (which applies only to national curriculum schools teaching Arabic, Islamic Studies, and Social Studies). Schools entering through the RCRC programme receive a three-year Saudisation exemption for teaching staff during the start-up phase. Leadership and administrative roles under RCRC-supported schools are fully exempt.^[7]

- Entry models: Owner-operated branch campuses (e.g. Aldenham), partnership models with local investors (e.g. Reigate Grammar with ADECO/Ethraa Holdings), and franchise arrangements.^[16] Schools must establish a Saudi-based legal entity, but education and healthcare now permit 100% foreign ownership.^[7, 11]

- Regulatory update: The Ministry of Municipalities and Housing introduced a new regulatory framework in December 2025 covering private schools, nurseries, and education complexes. Updated building standards, minimum space requirements per student, rules on street access and traffic flow, and guidelines around on-campus student accommodation. Any business plan or investment model built before December 2025 needs to be revisited.^[7]

- Financing: The National Infrastructure Fund (Infra) provides financing for education projects linked to student outcomes. Products include long-term and short-term loans, equity

participation, credit enhancement, and structured financing.^[7] The government also subsidises teacher salaries, particularly for qualified foreign staff, and provides capital expenditure support for land and buildings.^[5]

- Saudi families as the growth segment: While expatriates filled 73.56% of private school seats in 2024,^[10] Vision 2030 is driving increased Saudi enrolment with a target of 25% private school enrolment by 2030.^[5] The Madaris platform has identified 70 investment opportunities to expand supply for Saudi families.^[5]

14:10 - 14:30

SEND Provision: What Saudi Arabia Needs from UK Schools (20 mins)

A focused session on the specific SEND capabilities and services that Saudi Arabia is seeking from international schools.

Discussion areas:

- Inclusive education models: Saudi Arabia is transitioning from segregated special education institutes toward inclusion in mainstream classrooms.^[9] UK independent schools with established SEND departments, or specialist SEND schools have directly transferable expertise to offer.
- Priority SEND categories: Learning disabilities (2.1% of children aged 5 to 17 classified under the learning disability category per the General Authority for Statistics Disability Survey^[15]), autism spectrum conditions, speech and communication needs, and physical disabilities.^[1,3]
- Teacher training and professional development: Research consistently identifies a shortage of qualified SEND teachers as a primary barrier.^[3] The King Salman Center for Disability Research (KSCDR) is developing Arabic-standardised assessment tools and in-school training, but international expertise is needed.^[3] The UK-GCC Free Trade Agreement, currently at an advanced stage, includes provisions on licensing transparency and recognition of professional qualifications, which would directly affect the mobility of SEND specialists between the UK and Saudi Arabia.^[8]
- Assistive technology and adapted curricula: Saudi schools require support in implementing assistive technology, differentiated learning, and Individual Education Programmes (IEPs).^[3,9]
- Cultural considerations: Research indicates that 76% of Saudi parents want a combination of international qualifications alongside Arabic language, Islamic Studies, and Saudi cultural values.^[7] Schools that treat these components as secondary lose families within the first term.^[7] SEND provision must be built into this dual framework from the outset, integrating inclusion with both British and Saudi curricular expectations.

14:30 - 14:50

Lessons from the Field: UK Schools Already Operating in Saudi Arabia (20 mins)

Perspectives from UK entities that have already established operations in Saudi Arabia, covering practical lessons and challenges. Supporting comments from Saudi Embassy/Ministry of Education representatives.

Topics for discussion:

- Regulatory navigation: Ministry of Education licensing requirements, the Education and Training Evaluation Commission (ETEC) quality frameworks, and curriculum approval processes.^[11]
- Staffing and recruitment: Recruiting qualified SEND specialists for Saudi campuses, visa and employment requirements, and building local capacity. International curriculum schools are exempt from the 50% Saudi teacher quota. RCRC schools receive a three-year Saudisation exemption on teaching staff and full exemption on leadership and administrative roles.^[7]
- Adapting the UK model: Balancing the British curriculum with mandatory Arabic and Islamic studies, adapting pastoral care systems, and meeting local safeguarding standards. Co-education is permitted up to Grade 6 under the RCRC programme.^[5,13]
- Financial considerations: Fee structures vary across existing UK schools. King's College Riyadh charges SAR 45,899 to SAR 68,848 per year. Reigate Grammar reaches SAR 74,900. Downe House Riyadh goes up to SAR 84,800 in the senior years. Some international schools in Riyadh now exceed SAR 90,000 annually.^[7] The Ministry of Education approves fee structures for all schools, but approved ceilings for international schools are substantially higher than for national curriculum schools.^[5]
- Partnership structures: Working with Saudi investors and education operators (such as ATAA Education, Fawaz Alhokair Group, Cognita Middle East, and Maarif Education), and

maintaining brand and quality standards across campuses.^[16] Cognita's King's College Riyadh operated for six years in Diriyah before securing a 36,300 square metre purpose-built campus from PIF-backed developer ROSHN, a timeline that reflects the sustained investment required to establish credibility in this market.^[2, 12]

- Geographic spread: British schools are now operating in both Riyadh and Jeddah (Sherborne School opened in Jeddah in August 2025), with developers and government programmes expanding beyond the capital.^[6, 20]

- Timeline: Market entry requires sustained preparation and schools that have succeeded in the Kingdom built local relationships, secured credible partners, and engaged with government bodies well before making public announcements.^[6, 12, 16]

14:50 - 15:30

Roundtable Discussion: Barriers, Questions, and Next Steps (40 mins)

An open discussion for attending school leaders and representatives to raise questions and identify barriers to entry and for Embassy and Ministry of Education to highlight key incentives and support options available.

Guiding questions:

- What SEND-specific concerns do UK schools have about operating in Saudi Arabia?
- What support would schools need from the Embassy, SBJBC, or Saudi government bodies to progress their interest?
- How do schools assess whether the Saudi market is the right fit for their institution?
- What partnership or entry model would best preserve the school's SEND standards and ethos?
- What timeline and investment is realistic for a school entering the Saudi market?

15:30 - Onwards

Networking Reception

Opportunity for attending school leaders, Embassy officials, and SBJBC representatives to continue discussions in an informal setting.

*For further information, contact the **Robert McNamara** at robert@sbjbc.org.*

Sources and References

The data and figures cited in this agenda are drawn from the following sources. All accessed as of 18 February 2026 unless otherwise stated.

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