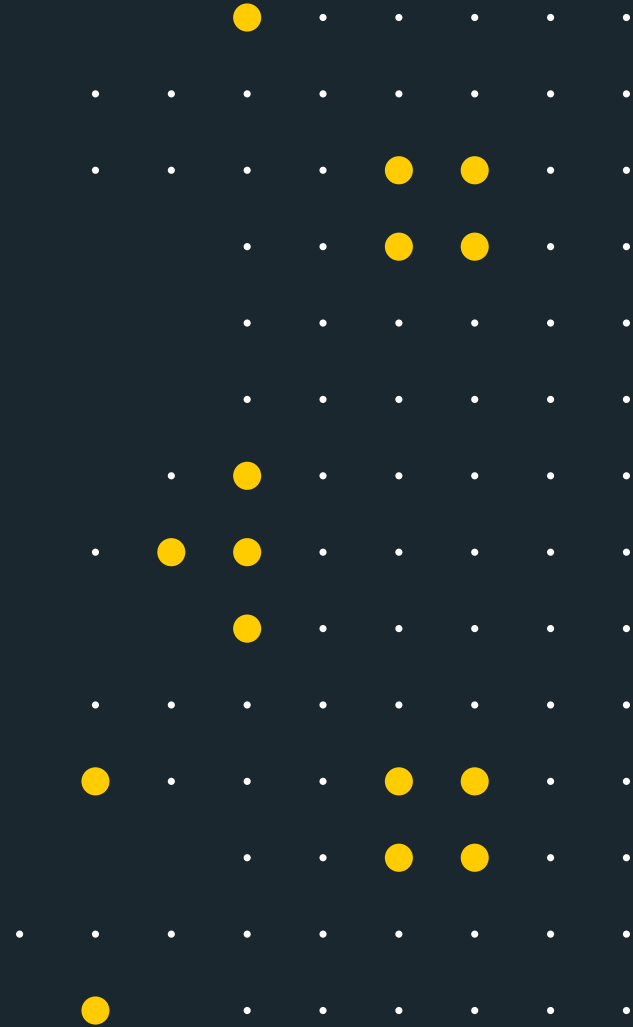


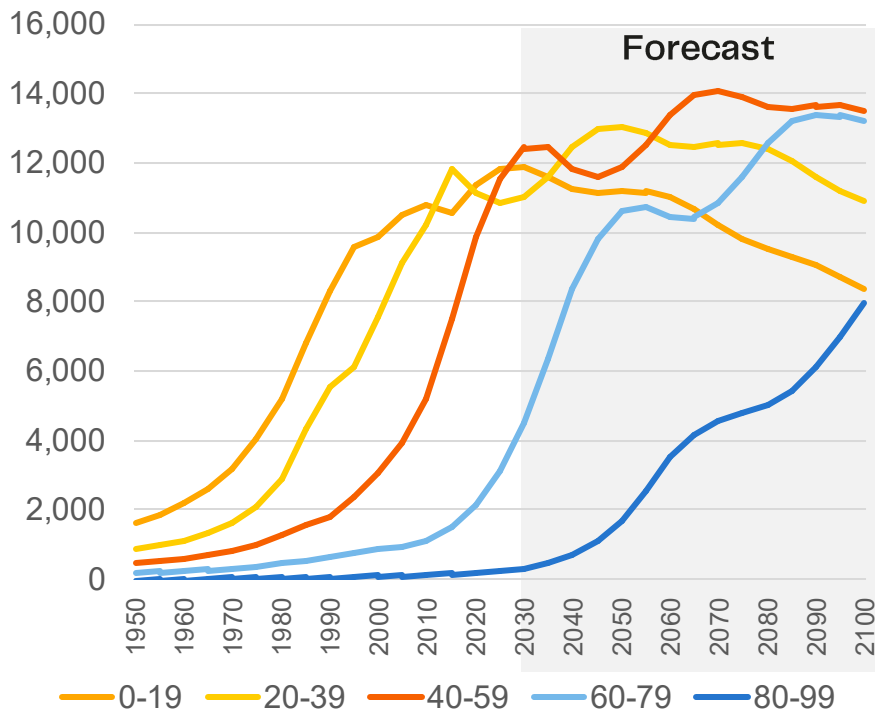


Saudi Arabia in 2030

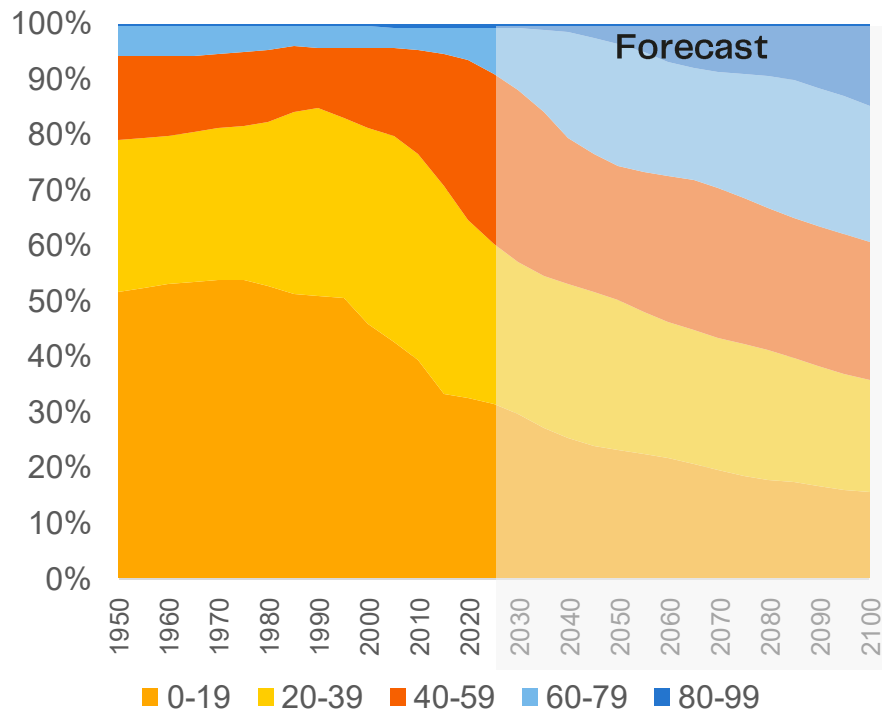


Saudi Arabia's young person population will shrink

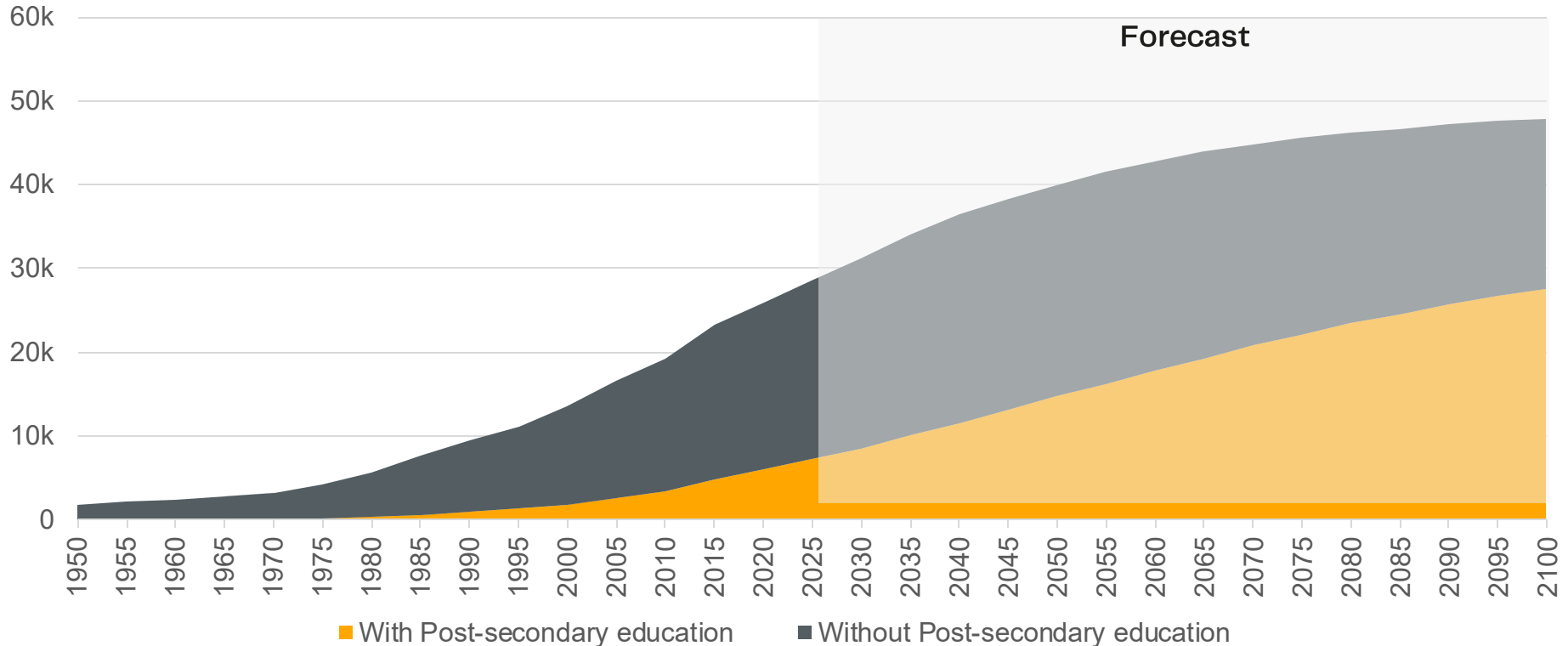
Population by age group (000's)



Share of population by age group (%)

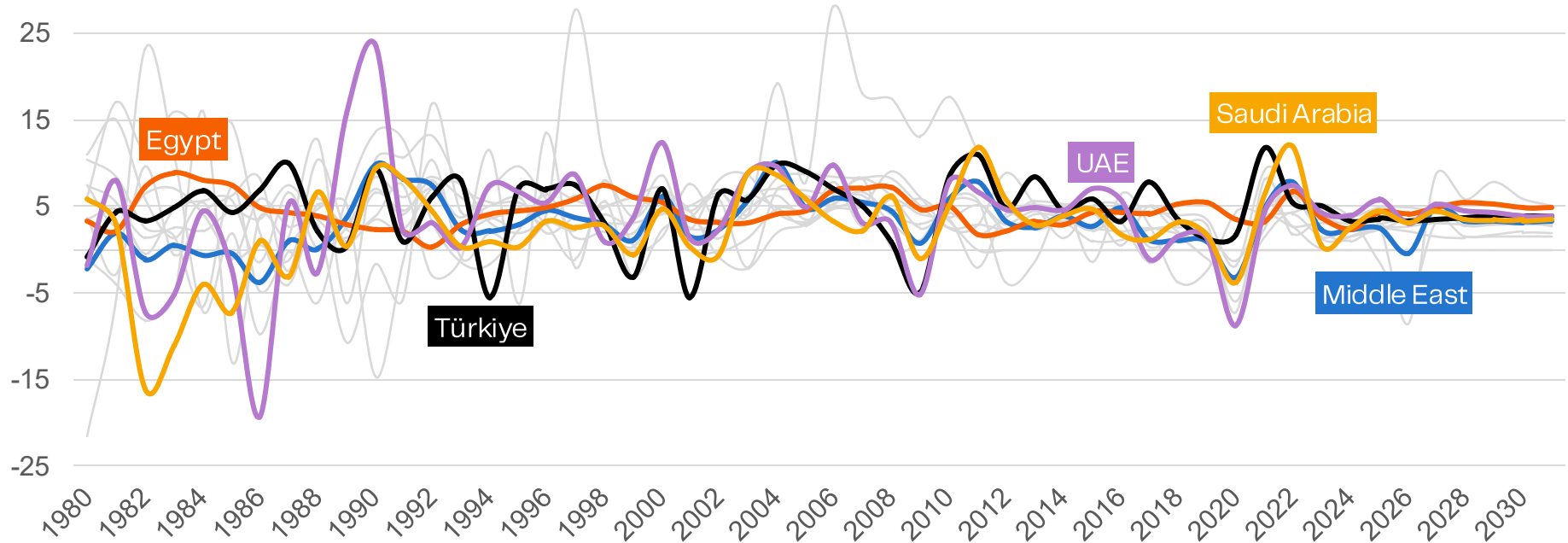


But by 2100, over 27.5m in Saudi Arabia will have a degree

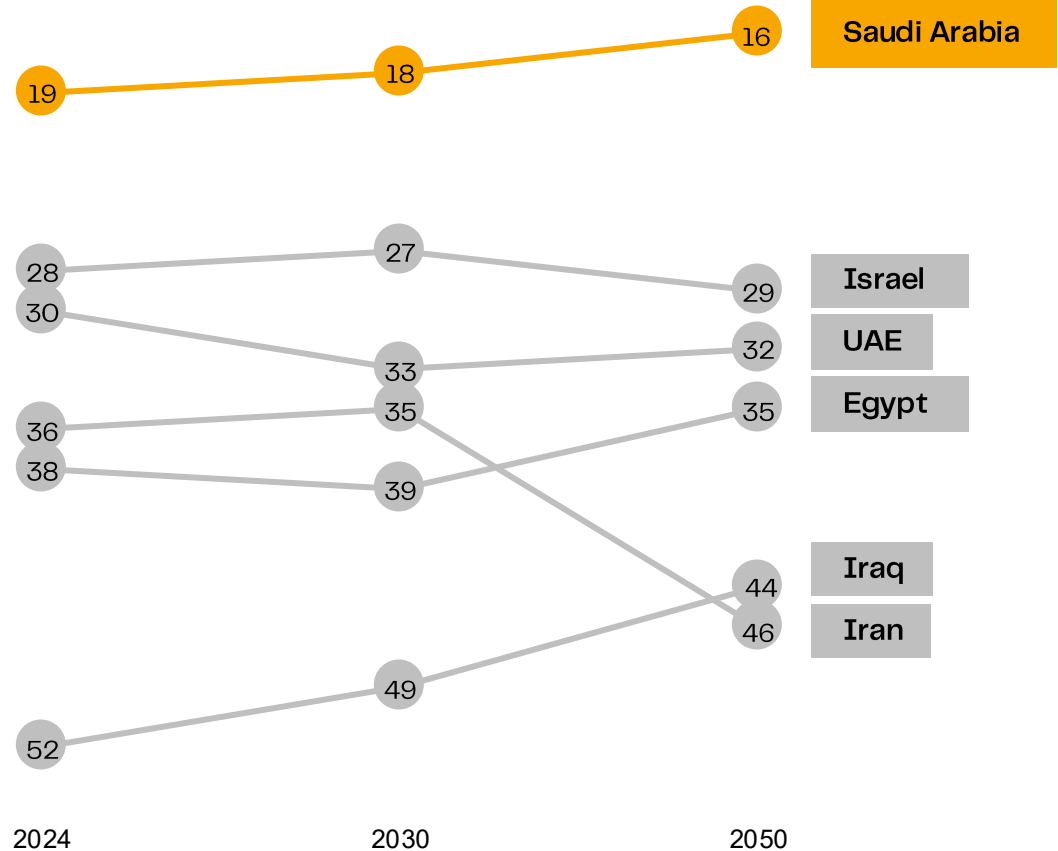


Which will help economic growth in Saudi Arabia to match that of its regional competitors

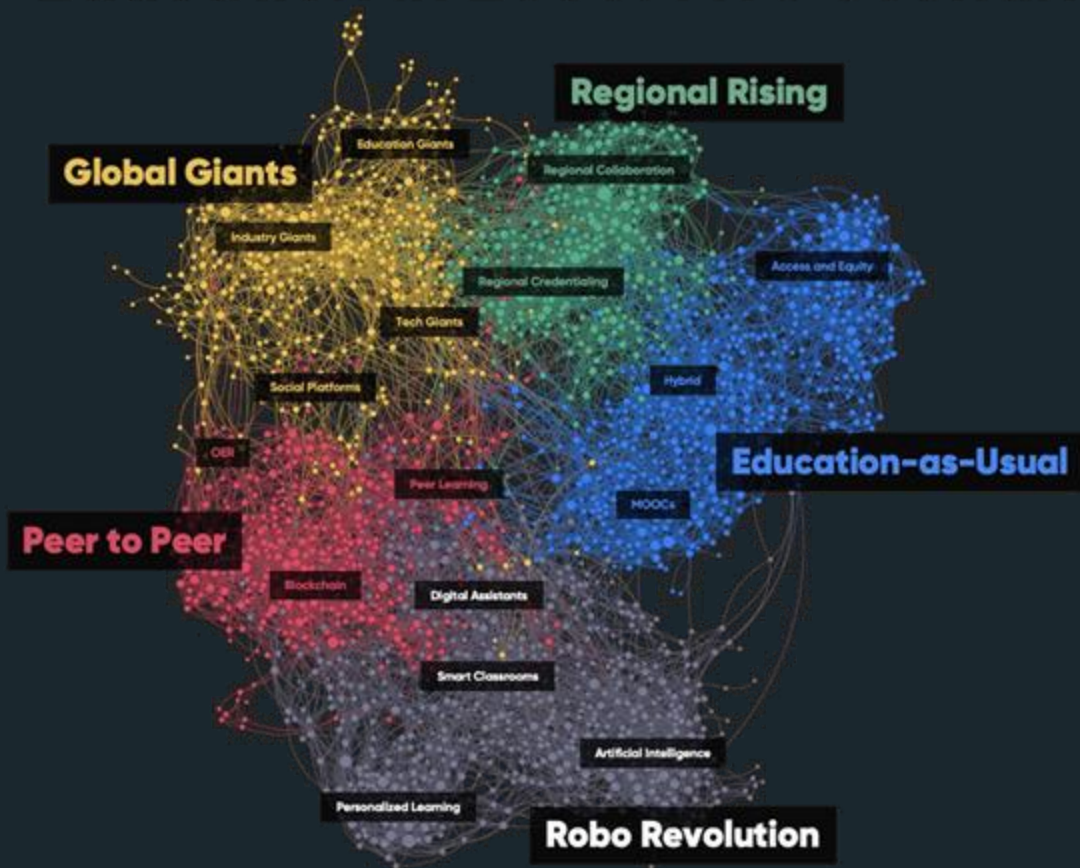
GDP Growth: MENA



And in our latest economic outlook, we expect Saudi Arabia to have cemented its place in the world's top 20 largest economies



5 Scenarios for Education in 2030



EDUCATION-AS-USUAL

Traditional education institutions remain the trusted source of learning and the most effective vehicle for jobs and prosperity. Higher Education consolidates, global talent platforms emerge and government remains the core source of funding around the world

REGIONAL RISING

Regional alliances dominate the competitive education landscape, supported by strategic and political cooperation. Cooperative blended delivery and regional talent hubs cross-load labor supply and demand to strengthen regions.

GLOBAL GIANTS

This global free market environment has fostered the emergence of 'mega-organisations' with ubiquitous brand recognition and the scale to achieve significant efficiencies and industry power.

PEER TO PEER

Learning online through rich, personalized human-to-human experiences dominates the post-secondary and skills training sectors. Blockchain technology fundamentally reconfigures credentialing and unlocks the collective creativity and IP of teachers.

ROBO REVOLUTION

AI drives a complete reversal in 'who leads learning', with virtual tutors and mentors structuring learning paths, providing assessment tasks, giving feedback, adjusting according to progress and organizing human tutoring when needed.

8 global shifts underpin our outlook for 2030 and beyond

**POWER
SHIFTS**

**RESOURCE
SHIFTS**

**DEMOGRAPHIC
SHIFTS**

**TECHNOLOGY
SHIFTS**

**ECONOMIC
SHIFTS**

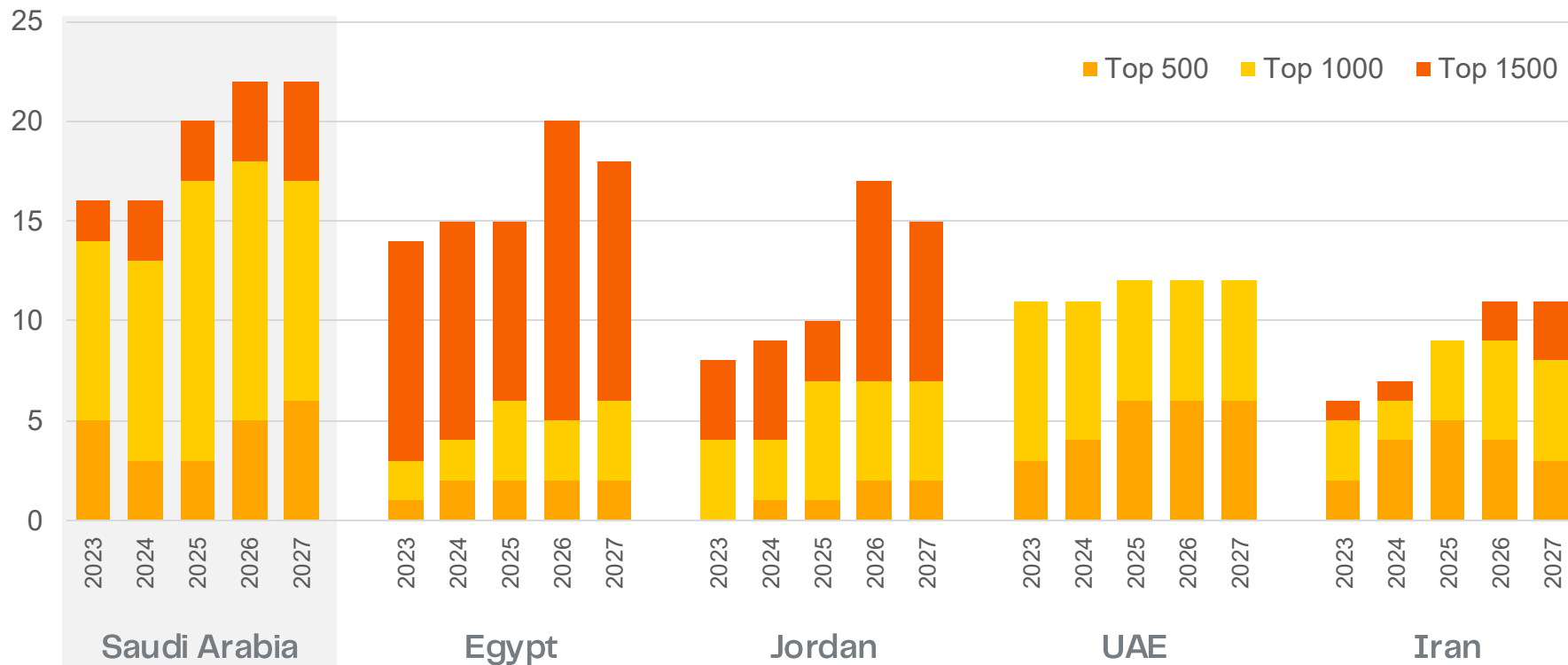
**ENERGY
SHIFTS**

**URBAN
SHIFTS**

**BEHAVIOURAL
SHIFTS**

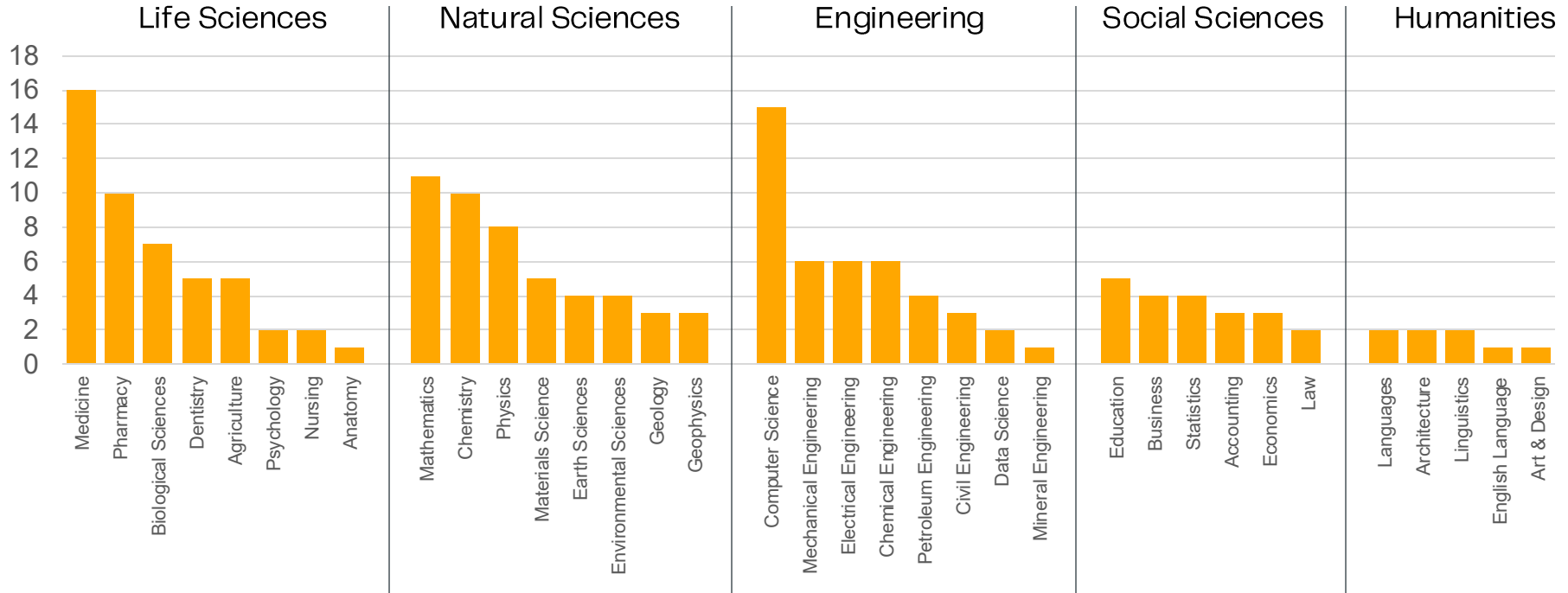
Institutional performance

Saudi Arabia remains the country with the highest number of highly ranked institutions within the region



This has been achieved by building strong representation within Life and Natural Sciences subjects

Number of ranked Saudi Arabian institutions by subject

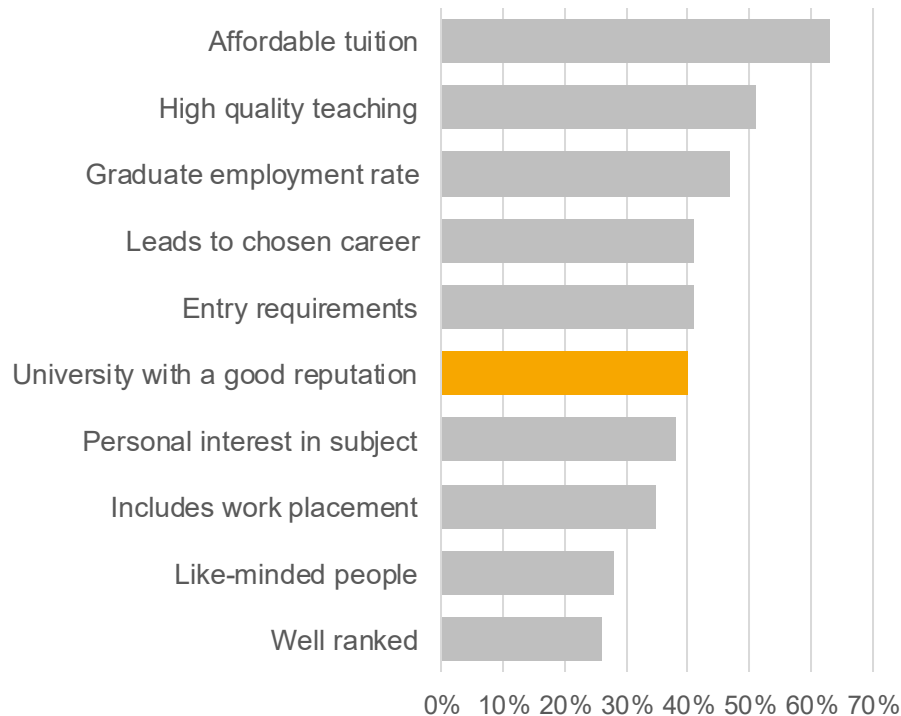


This is important, as most international students view reputation as an important factor when choosing a university

40% Cite reputation as important when choosing a **course**

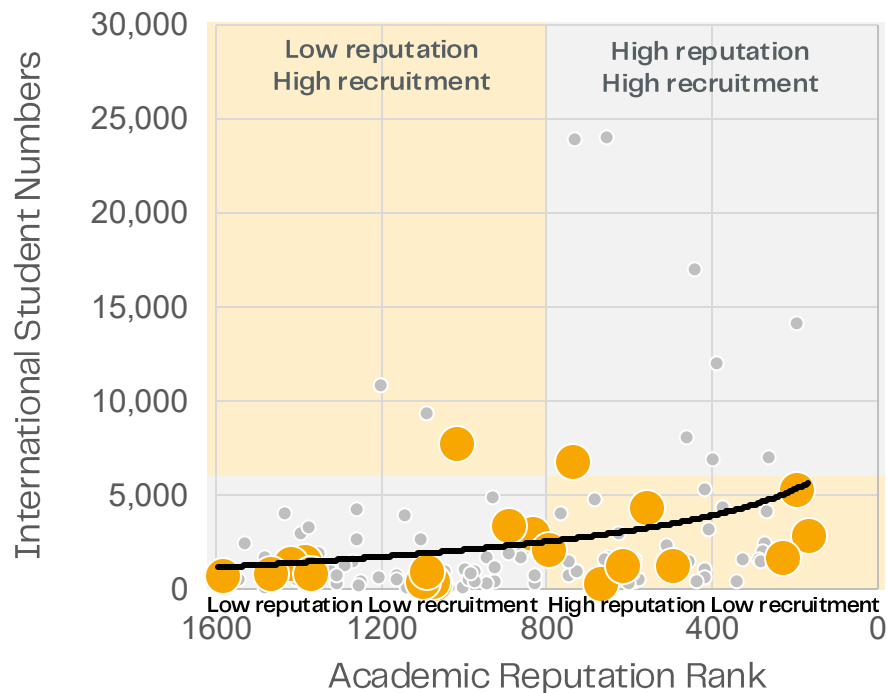
34% Cite reputation as important when choosing a **university**

Importance of reputation to students when choosing a course (Top 10)

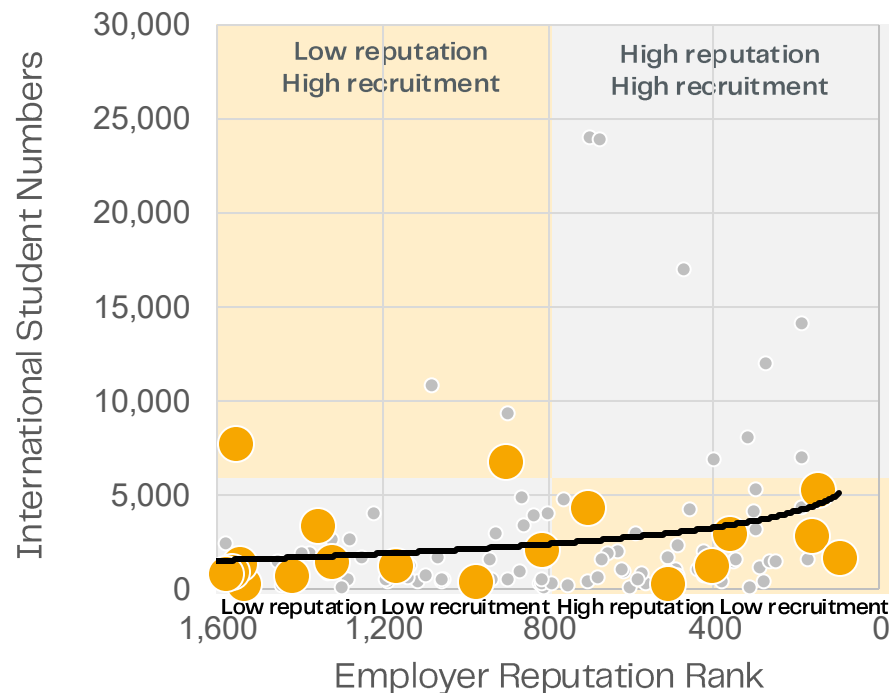


Reputation is strongly tied to international recruitment

Academic Reputation



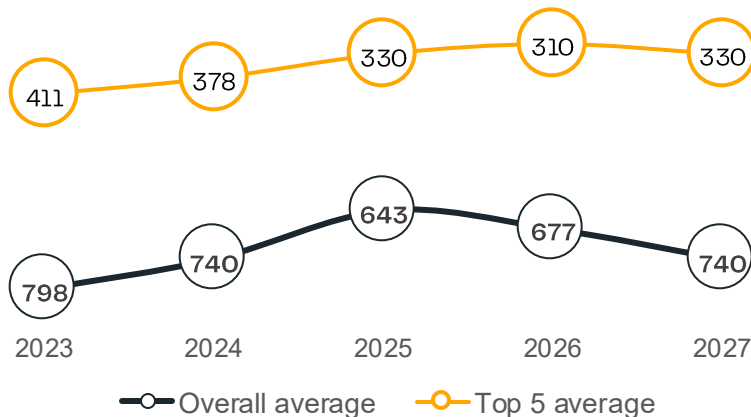
Employer Reputation



Leading institutions in Saudi Arabia are making active efforts to improve their reputation

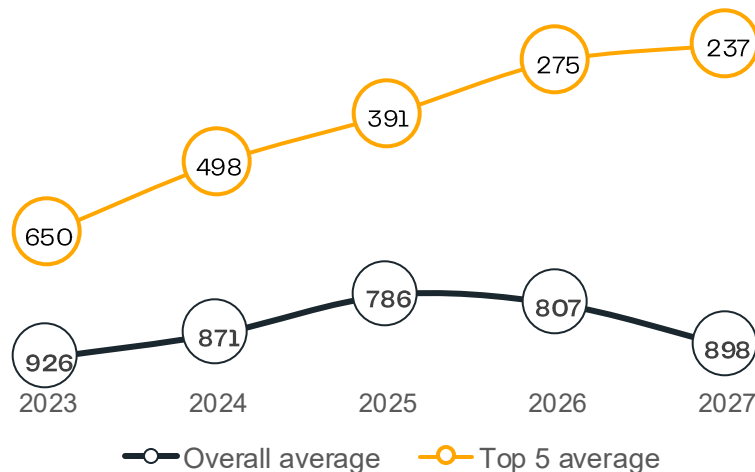
QS Academic Reputation (average rank)

The average Academic Reputation rank has improved by **58** places



QS Employer Reputation (average rank)

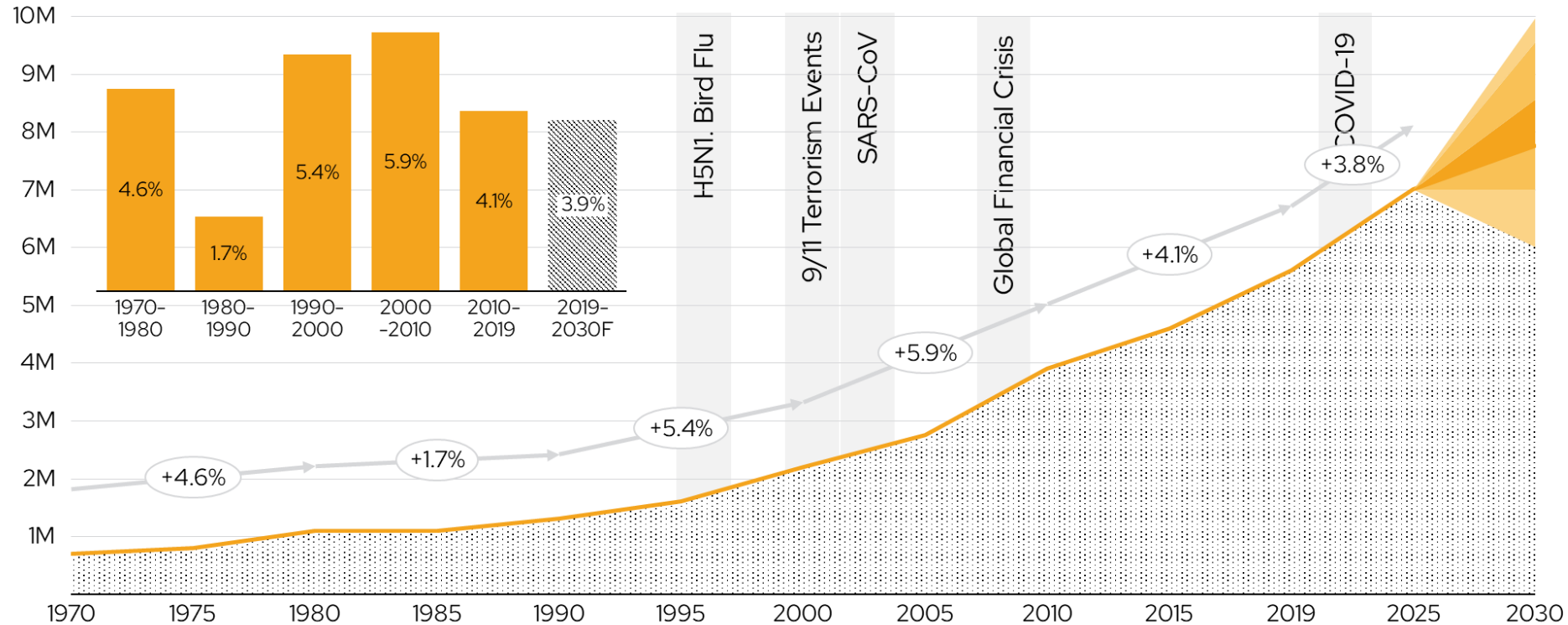
The average Employer Reputation rank has improved by **28** places



Student recruitment

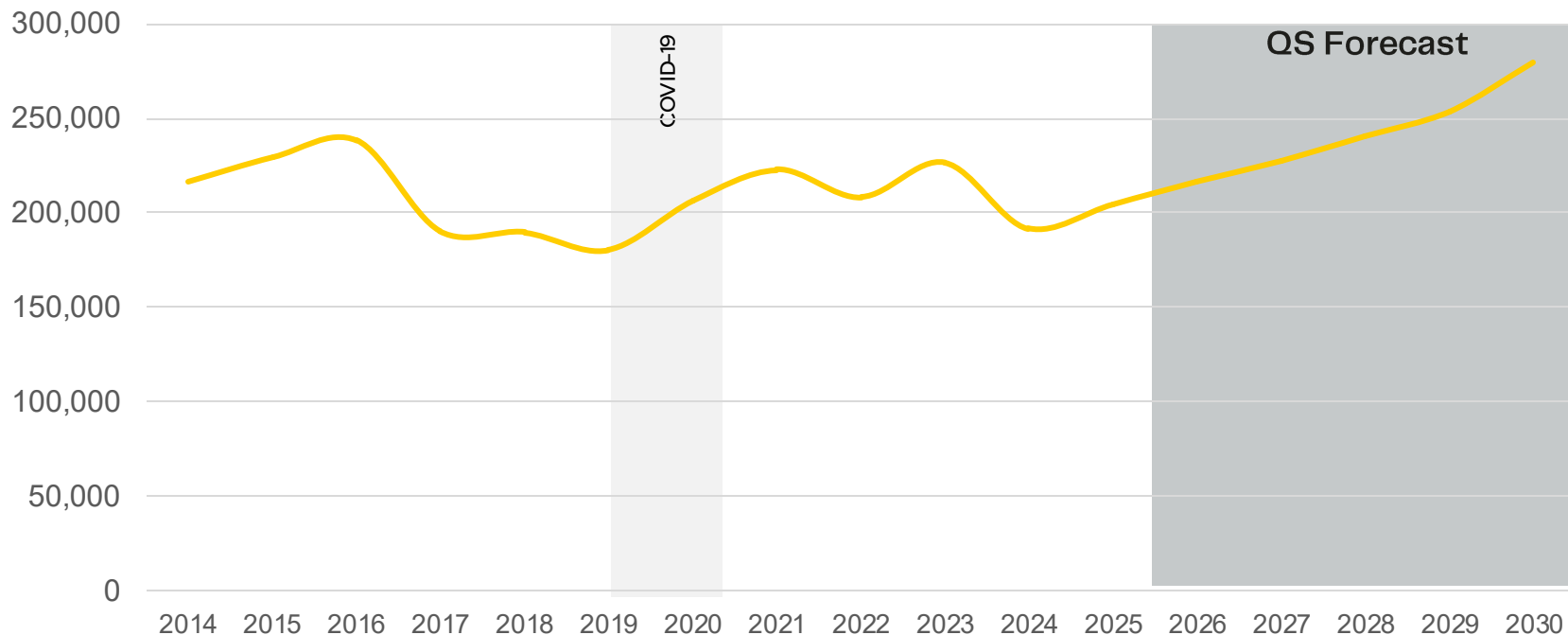
~8.5 million international students will study abroad in 2030

Total Global International Students, 1970 – 2030F



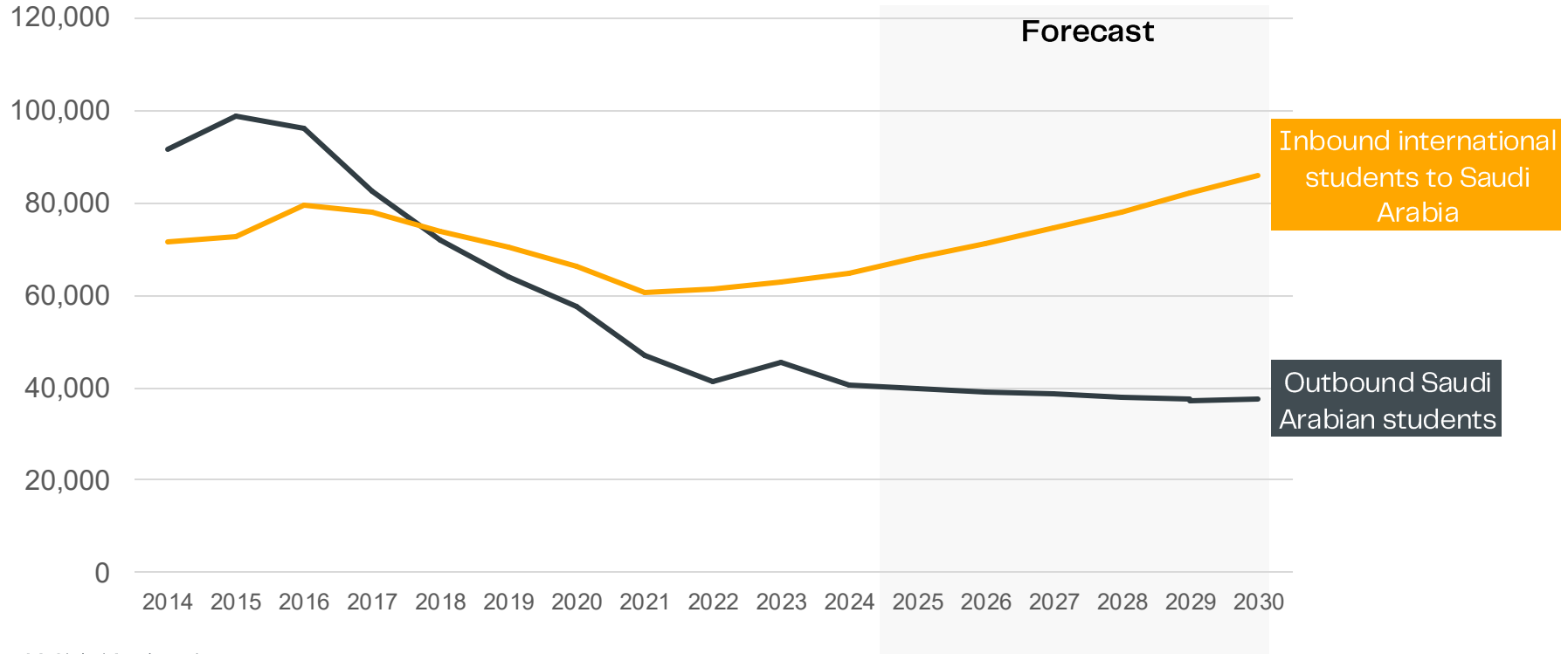
Nearly 300,000 of these expected to study in MENA by 2030

Inbound international student numbers



Source: QS Global Student Flows (excluding OPT)

Saudi Arabia will solidify its position as a destination for international students, and less as a source market



A welcoming environment and teaching quality remain key factors for candidates looking to Saudi Arabia

Choosing a course

1. Affordable tuition fee options
2. It offers high quality teaching
3. High graduate employment rate

Choosing a country

1. Welcoming to intl students
2. Universities with high quality teaching
3. Visa to work after graduating

Choosing a university

1. It offers scholarships
2. Welcoming to intl students
3. It offers high quality teaching

The priorities for different growth markets can vary

	Africa and Middle East	Europe	Asia Pacific	Americas
It offers high quality teaching	3			1
It offers scholarships	1		1	
Good careers service		1	3	
Welcoming to international students	2		2	3
Specific course of interest				2
Affordable accommodation		2		
High graduate employment rate		3		

Skills and workforce

Learn to earn lifecycle

Schools

Traditional organisations that facilitate learning

Learn

Courses, curriculum, experiences build and maintain skills

Skills

50,000 Skills required in ~1,900 different occupations

Jobs

3.3B people employed in ~1,900 different occupations

Firms

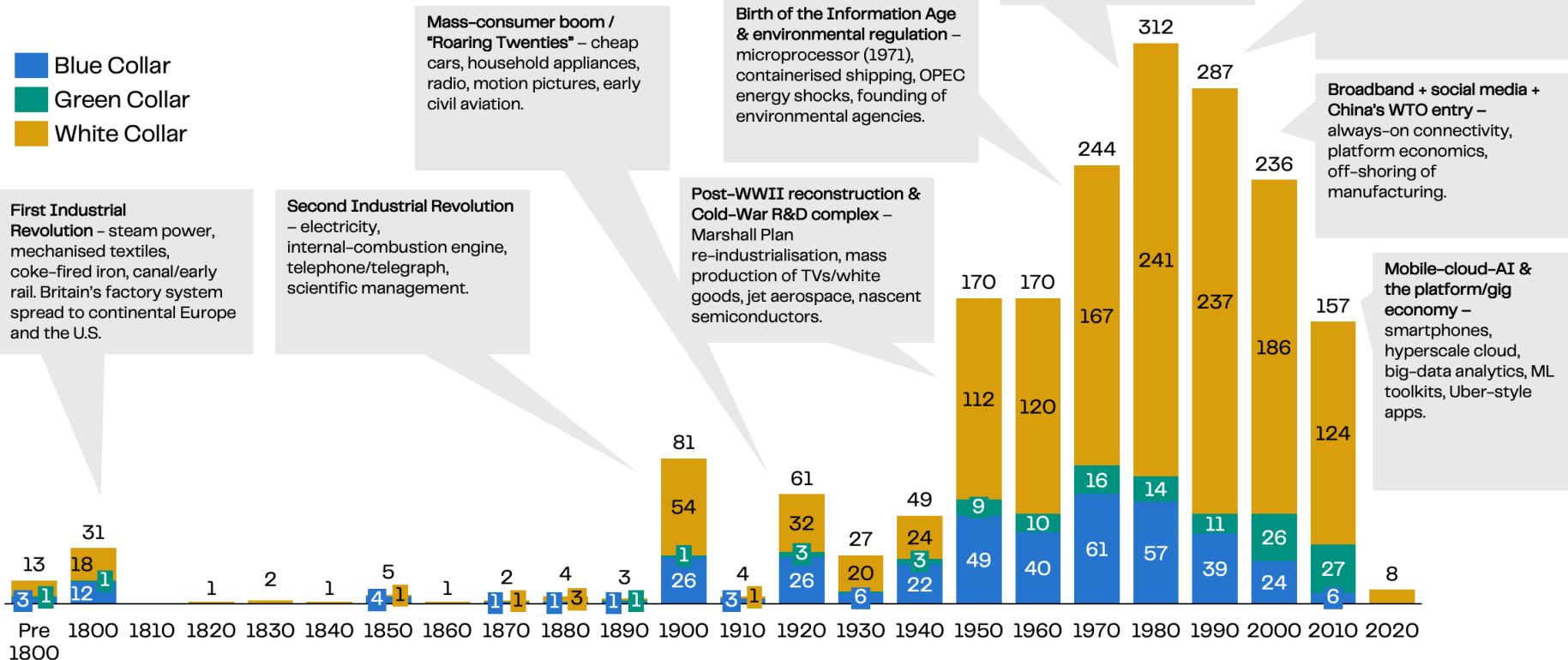
Millions of firms employ billions of people



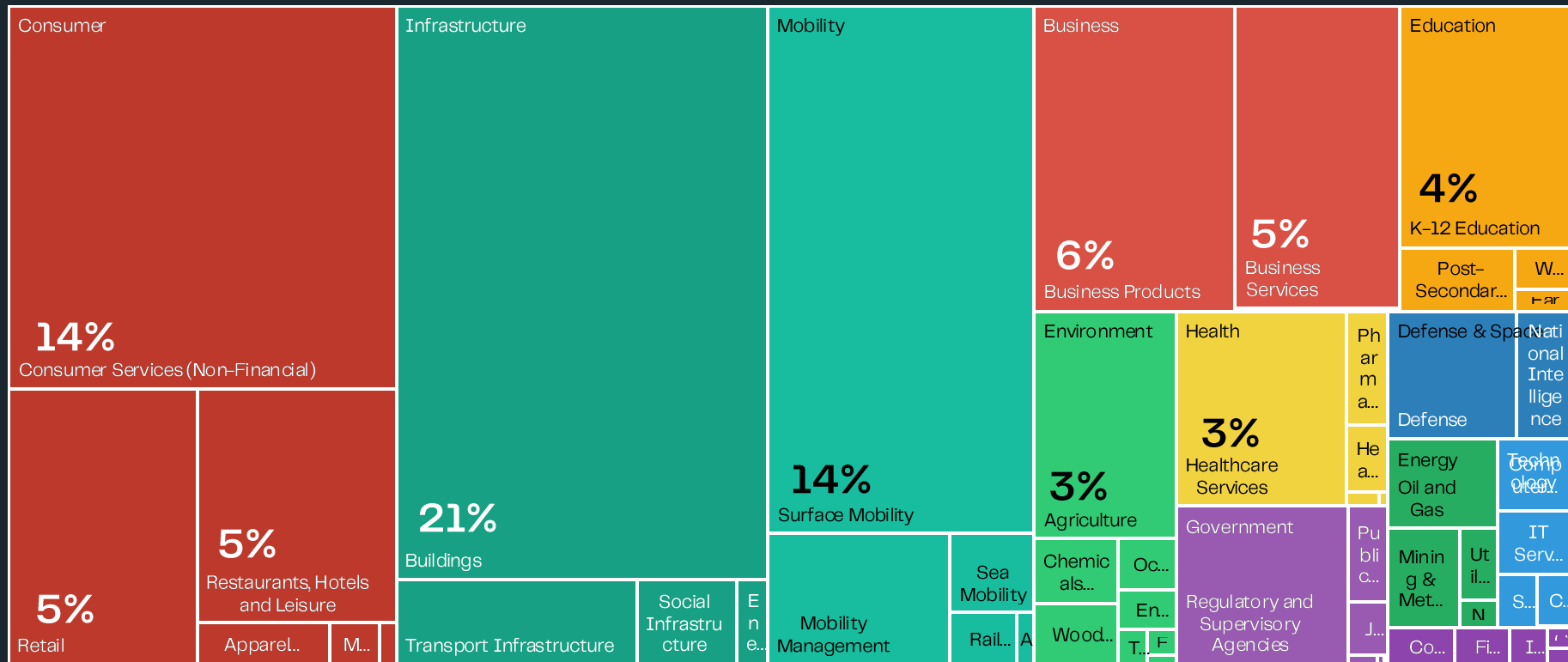
QS' industry and occupation taxonomy



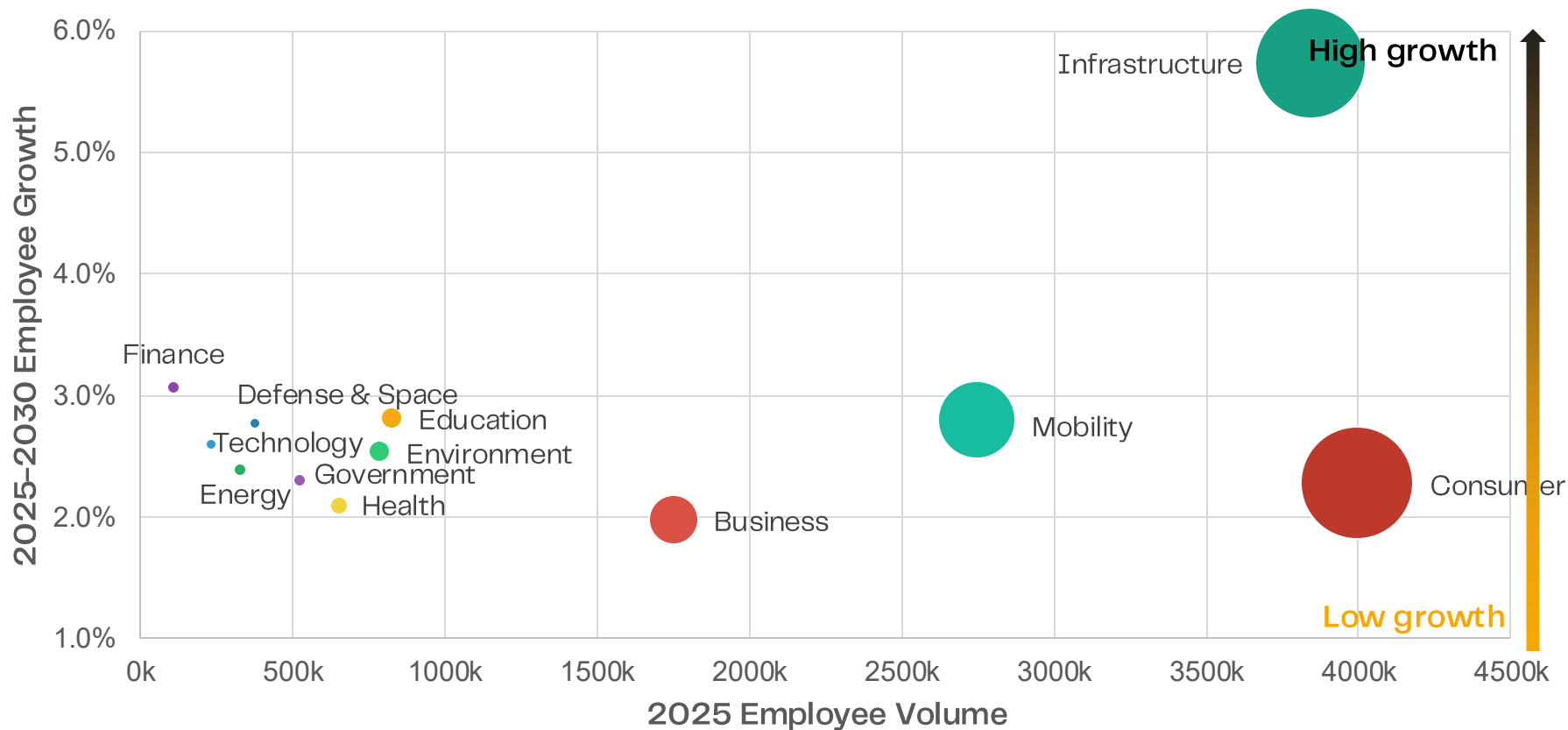
1,890 Occupations by the Decade that each became “Mainstream”



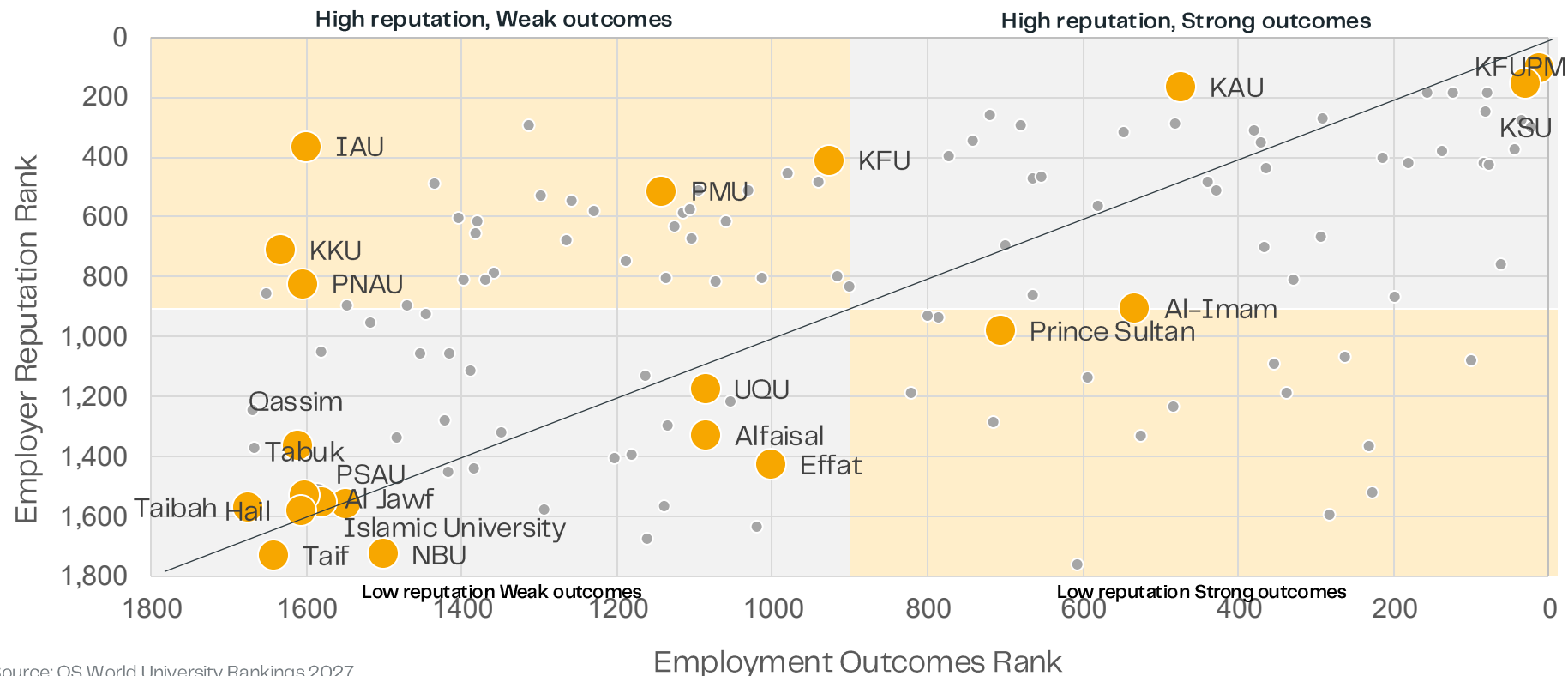
Saudi Arabia ~16m employed persons



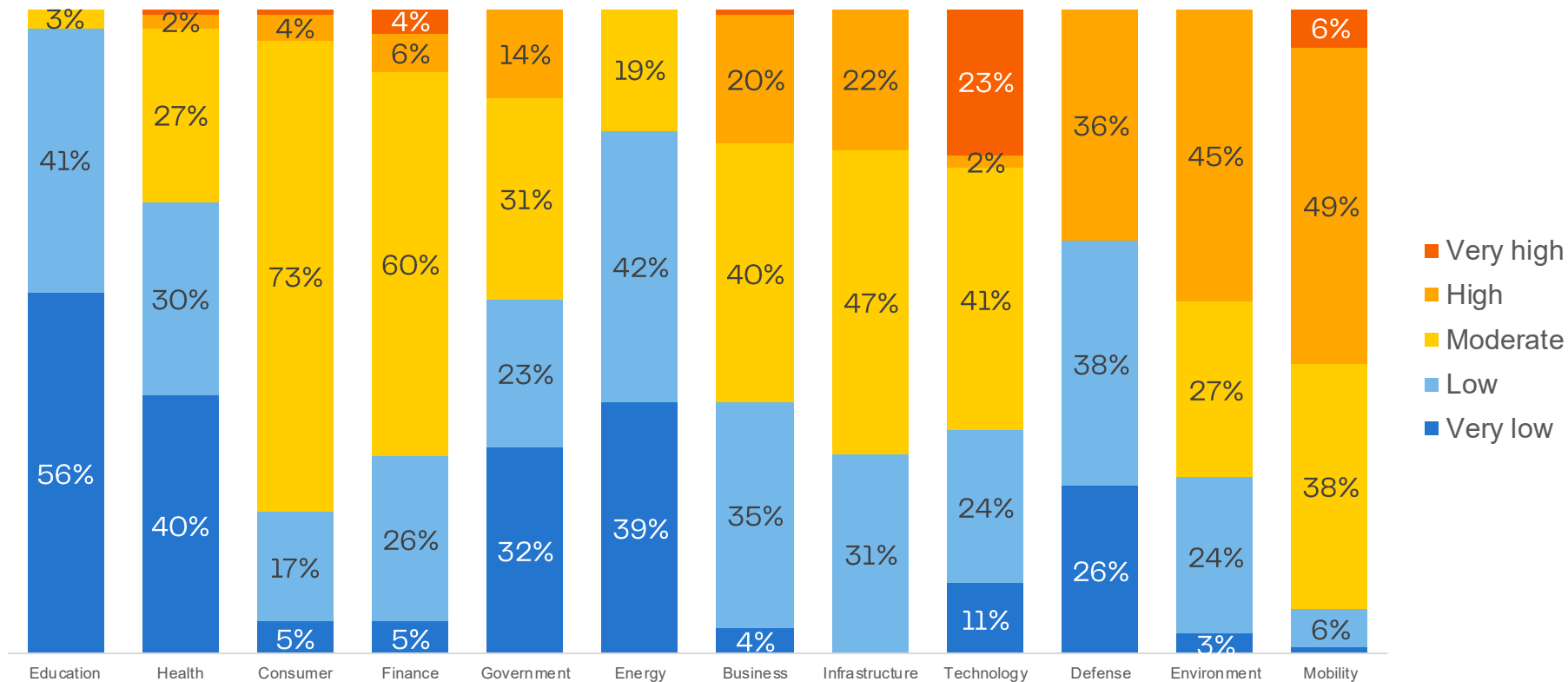
Growth will be uneven across industries



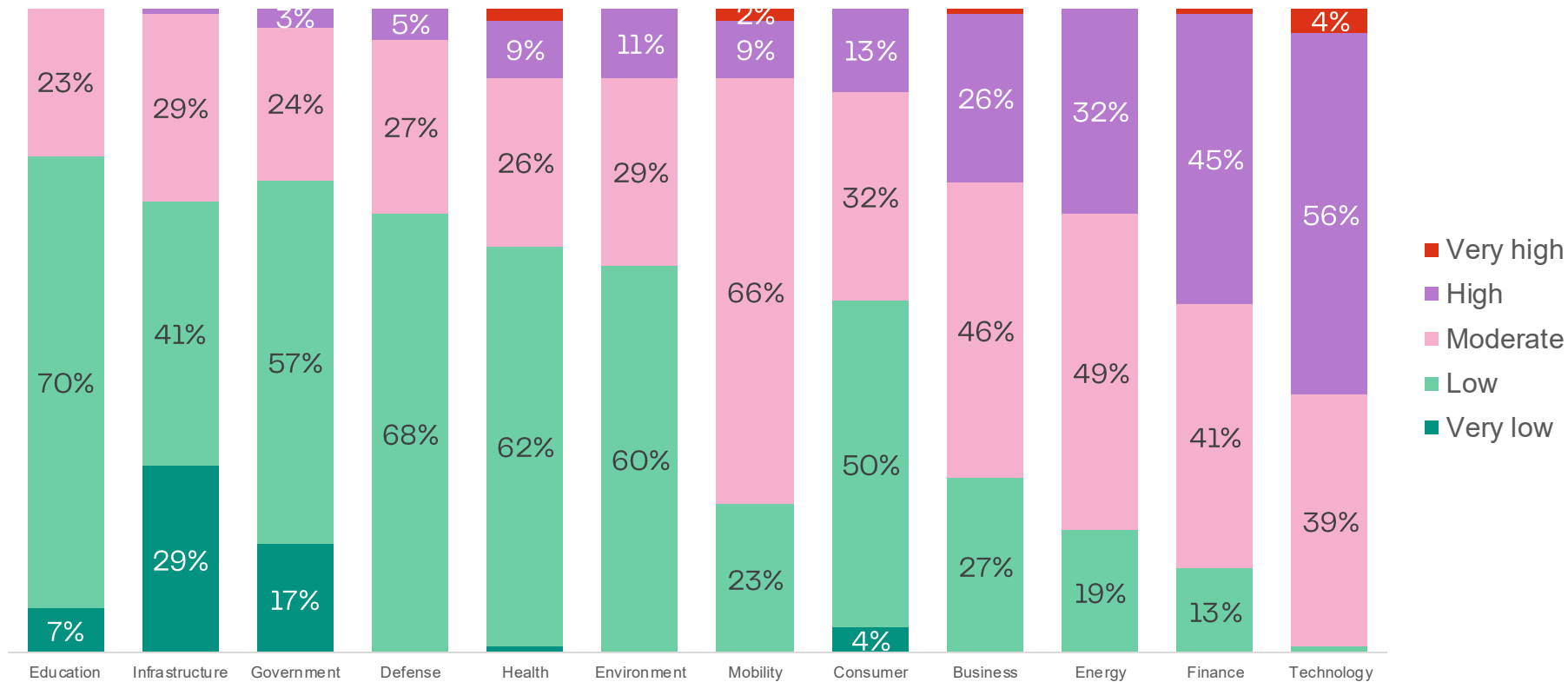
Most Saudi institutions trail their regional competitors on graduate employability and outcomes



AI automation vulnerability by industry

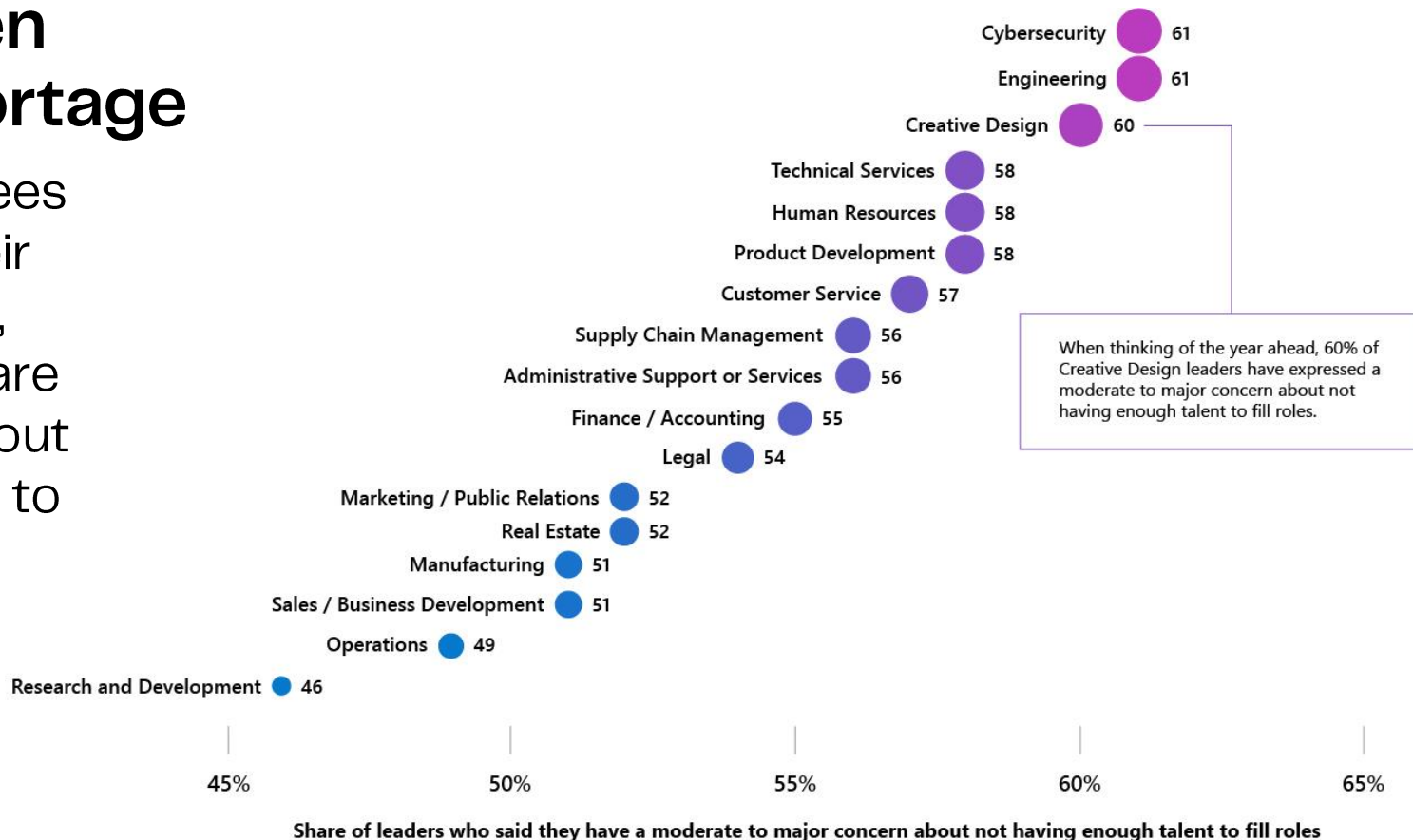


AI augmentation potential by industry



The hidden talent shortage

While employees fear losing their jobs due to AI, most leaders are concerned about not being able to fill key roles



Innovation and technology

Where are universities focusing their AI efforts?

Category

**AI to drive
institutional mission**

- Transforming the student experience and outcomes
- Advancing research
- Providing opportunity for all students

Operational efficiency

- Achieving efficiency, access and transparency
- Competitive positioning for the future

**Innovation and
transformation**

- Advancing a culture of innovation
- Institutional reengineering

Strategic objectives for AI

AI powered learning tools are supporting students and institutions to deliver rapid, high ROI outcomes

Study Partners

These chat-based intelligent companions offer on-demand support by answering questions, reinforcing subject knowledge, guiding practice, and providing personalized feedback based on each learner's pace and comprehension. Whether helping a young student build foundational skills or supporting adult learners in complex subjects, they boost engagement, foster confidence, and are available in and out of formal learning environments.



STEAM Sidekicks

AI-powered robotic companions are designed to support hands-on exploration across STEAM fields, acting as interactive partners in learning. These companions guide learners through coding, engineering, scientific concepts, and mathematical reasoning, making the process more engaging and accessible through playful interaction, problem-solving, and personalized support.



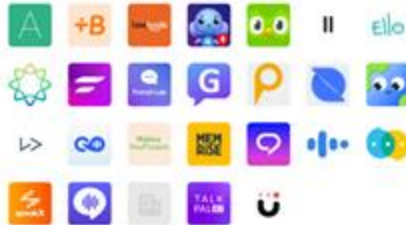
Career Navigators

Workforce companions that offer personalized support for professional growth and career development. These intelligent assistants help individuals and employers navigate career planning, mentoring, coaching, skills mapping, talent acquisition, and upskilling.



Language Companions

Virtual companions are designed to make language learning more enjoyable and interactive by serving as engaging partners in the learning process. They introduce new vocabulary, facilitate conversations, correct pronunciation, and keep learners motivated through language-based games and activities.



Wellbeing Guides

Virtual assistants that provide accessible, real-time support for physical, emotional, and mental well-being. These companions engage users through interactive conversations, mood tracking, and guided activities that foster emotional literacy, resilience, and self-awareness—complementing traditional health and wellness systems.



Research Aids

AI-powered tools designed to support researchers by automating time-consuming tasks such as literature reviews, data analysis, and information synthesis. Using machine learning and natural language processing, these tools summarize key information, identify relevant studies, and suggest new research directions.



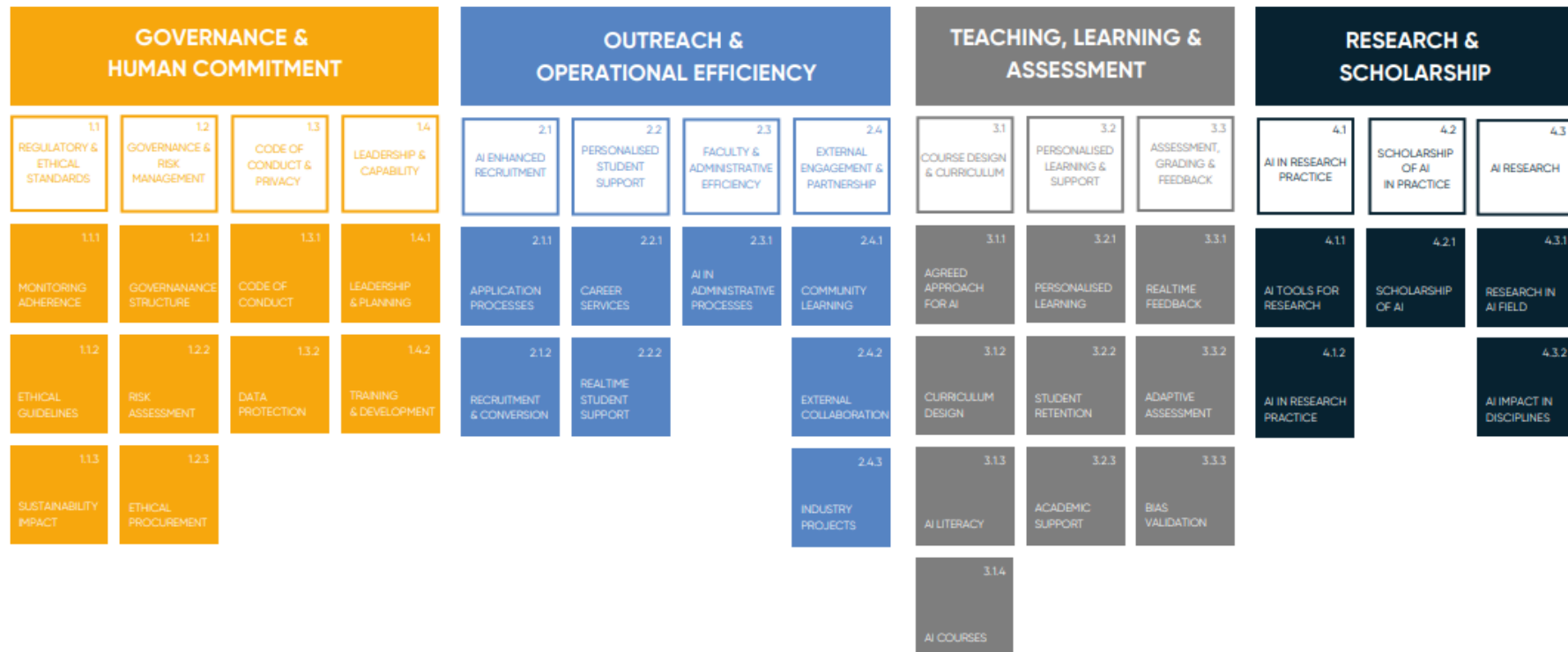
Teaching Assistants

AI-powered assistants support educators by automating administrative tasks, personalizing learning experiences, and providing actionable insights from classroom data. These virtual assistants manage grading, lesson planning, resource creation, and student inquiries, allowing teachers to dedicate more time to direct student engagement and personalized instruction.

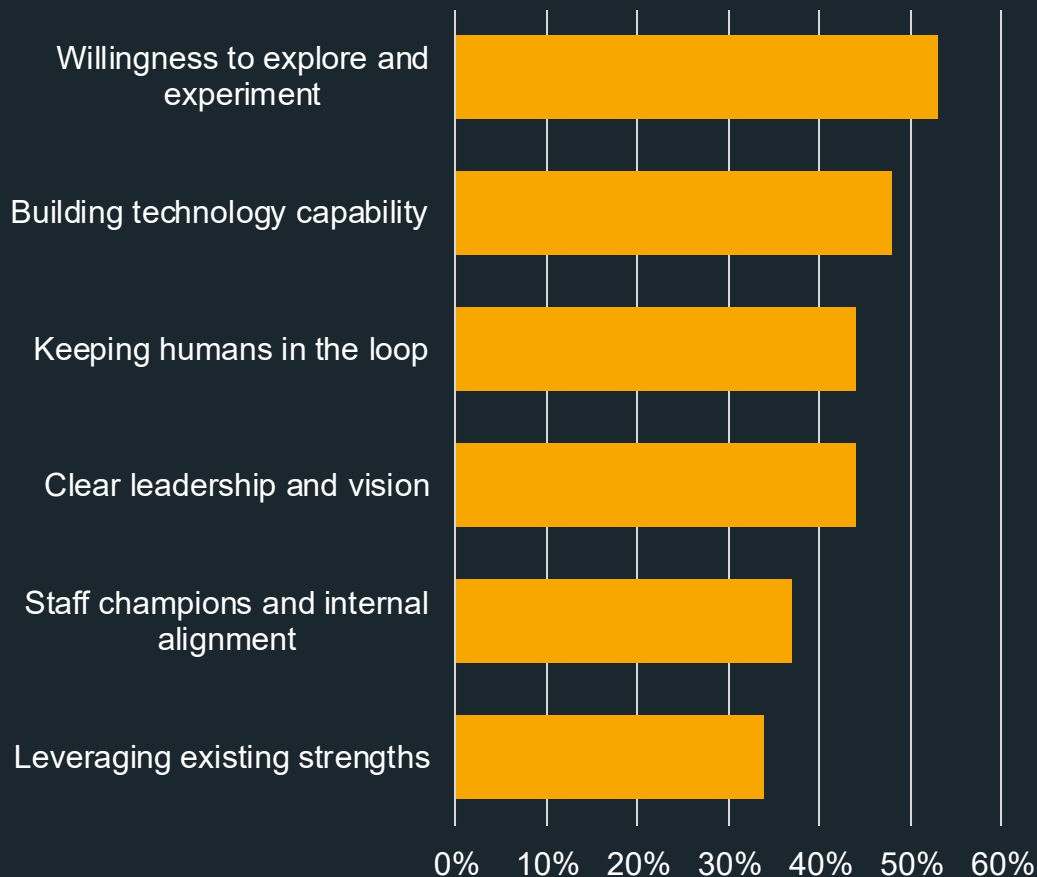


AI capability framework

An open source framework helping universities to evaluate and enhance their artificial intelligence capabilities. The framework provides a structured approach for universities to assess their current AI integration, identify areas for improvement and make informed strategic decisions. The framework is built upon four key pillars, segmented into 14 indicators and includes over 30 sub-indicators to assess institutional capabilities.



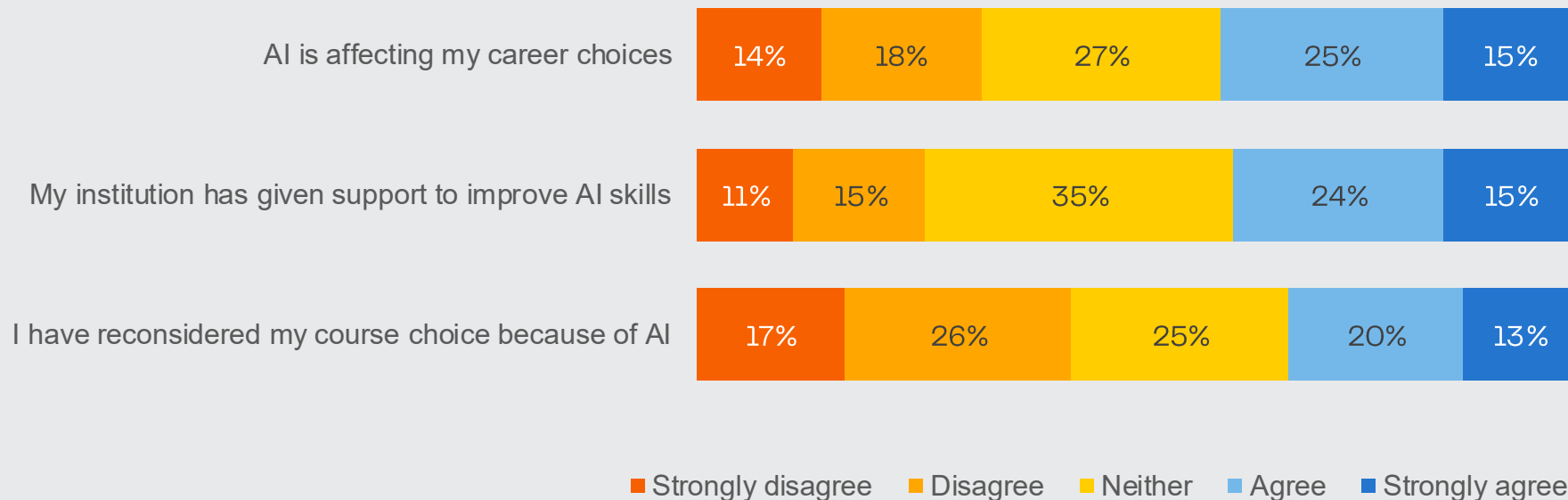
The willingness to explore and experiment is seen as the biggest contributing factor to successful AI adoption



Source: QS AI Academic Pulse Survey 2025

AI is influencing student decisions related to their career choices

To what extent do you agree with the following sentences?



Strategic recommendations for Saudi Arabian higher education

Embrace competitiveness

An ageing population will continue to put greater strain on Saudi Arabia's younger age-groups

This will reiterate the drive for greater productivity and output amongst its working age population...

...which will support the continued demand for a university-level education

Continue to innovate in specific subject areas to drive competitiveness

Saudi Arabia has cultivated clusters of high performing institutions in specific subjects – most notably in Life and Natural Sciences

Broadening this innovation to as many institutions as possible is crucial as it provides students with a broad range of potential choices

Invest in the student experience

International student flows are diverging away from the 'Big Four' and into a range of secondary destinations.

Saudi Arabia is well placed to benefit from this divergence but institutions must be supported with compelling graduate pathways and opportunities

Collaborate with industry to drive curricula development

Saudi Arabia's industry and workforce landscape will require a shifting platform of skills from graduates who are adaptable enough to support this unique landscape.

Collaboration with industry to produce graduates that can match employer needs and drive value is essential

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