

Special Education Needs – Schools Opportunity

Investment Opportunity

EDUCATION – April 2022





Special Education Needs - Schools Opportunity

OPPORTUNITY DESCRIPTION: Invest in KSA's education sector by establishing high-quality SEN schools across KSA

OPPORTUNITY REVIEW

Overview of SEN* population in KSA

Saudi Arabia has >1M people with special education needs



Saudi SEN population in KSA (2017)



Saudi population with intellectual impairments (2017)

There are multiple types of intellectual impairments prevalent in the Kingdom; there is a rising need to increase SEN* provision in the segment

Types of intellectual impairments

- Autism
- ADHD**
- Down's Syndrome
- Other intellectual disabilities

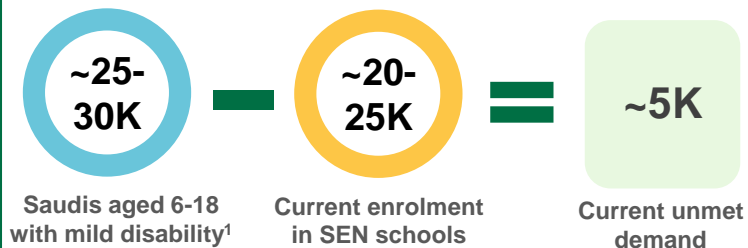
Growth of SEN* provision in KSA

The growth in formal SEN* provision in KSA is driven by multiple reasons

- Increasing population base
- Rising awareness in society
- Improvement in SEN diagnosis and testing
- Improvement in SEN curriculum and outcomes
- Increased Government provision and financial support
- Higher accessibility of testing knowledge and facilities in rural areas

Expansion of SEN* schools in KSA

There is a need to expand specialized education provision for intellectually impaired children in KSA



There are 2 types of models that can be adopted by investors to enhance SEN provision through schools

- SEN Education in K-12 schools
- Specialized SEN Schools

SEN Schools in KSA are regulated by **Ministry of Education, KSA**. Provision in Public schools is free whereas provision in private schools is encouraged through education vouchers

Note: *SEN stands for Special Education Needs **ADHD stands for Attention Deficit Hyperactivity Disorder

¹ Assuming a 1% incidence rate, 20-25% of population in age group 6-18, and ~50% of disabilities being mild



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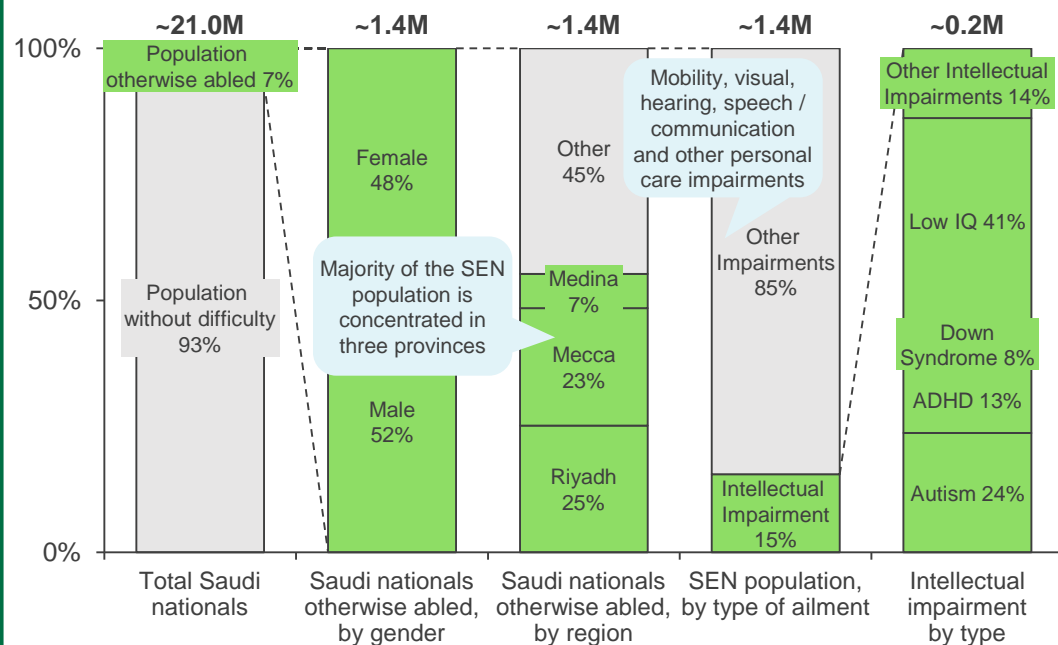
OPPORTUNITY DESCRIPTION: Invest in KSA's education sector by establishing high-quality SEN schools centers across KSA

KSA SEN OVERVIEW

Special Education Needs overview in KSA

KSA Saudi SEN population

(2017); Percentage, Number of persons



There is a **lack of trained education / therapy providers**, as well as specially tailored facilities for individuals with intellectual impairments (special education needs). Combined with the **current degree of under-diagnosis** in the region, there is an **urgent need to increase SEN provision** in the segment, which can be accelerated through the **participation of private providers**

Intellectual impairment affects a **person's ability to learn at an expected level and function in daily life**; the various types of impairments require varying degrees of **special attention and focus**

- Autism**
 - Developmental disorder that causes difficulty in communication, restricted / repetitive patterns of thought and behavior
 - KSA Incidence rate: ~1%
- ADHD***
 - Condition that causes attention deficiency, hyperactivity and /or impulsiveness
 - KSA Incidence rate: ~0.2%
- Down's Syndrome**
 - Genetic disorder usually causing intellectual disability, developmental delays and a distinct facial appearance,
 - KSA Incidence rate: ~0.1%
- Other intellectual disabilities**
 - Other disabilities include mental retardation etc., which is characterized by an IQ <50
 - KSA Incidence rate: ~0.5%

Drivers of increasing SEN cases

Enrolments in formal SEN have seen a growth over the last few years driven by increased population, improved awareness, diagnosis capabilities and accessibility of SEN facilities

- Increasing population base**
- Rising awareness in society**
- Improvement in SEN diagnosis and testing**
- Improvement in SEN curriculum and outcomes**
- Increased Government provision and financial support**
- Higher accessibility of testing knowledge and facilities in rural areas**

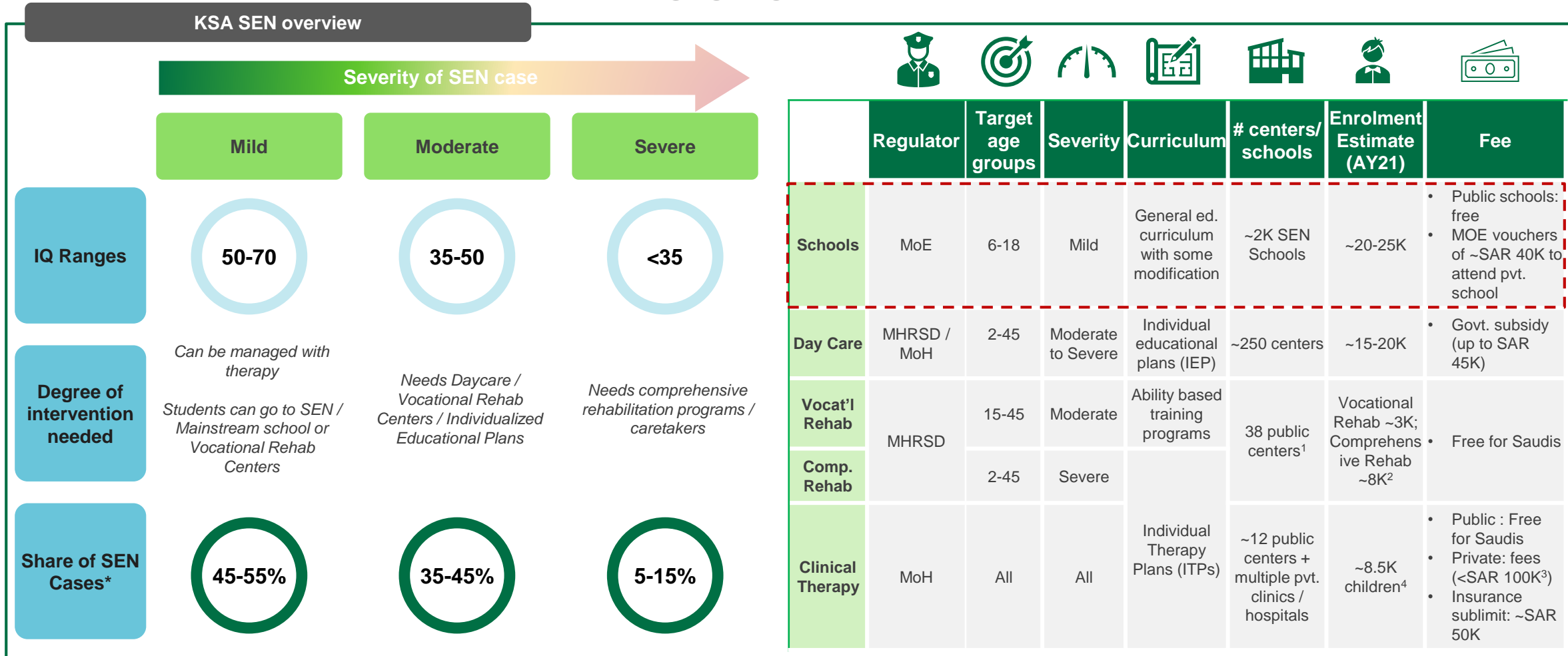
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KSA SEN OVERVIEW



Note: * Intellectual SEN cases only; ¹38 public centers operated by MHRSD; ²Includes 2K waitlisted children; ³Calculated as (SAR 200 per session) x (2-3 sessions daily) x (5 days per week) x (40 weeks); ⁴Public centers only



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EXPANSION OF SEN SCHOOLS IN KSA

Why invest in SEN Schools?



With rising awareness and diagnostic capabilities (among other factors), there is an increasing need and demand for specialized SEN K-12 provision in KSA where intellectually impaired students will get tailored development and learning opportunities for a strong educational foundation

Types of SEN School Models in KSA



Regulated by **Ministry of Education, KSA**



Free provision in public schools and vouchers of up to **~SAR40K for Saudi nationals or children with Saudi mothers to attend private schools**



SEN Education in K-12 schools

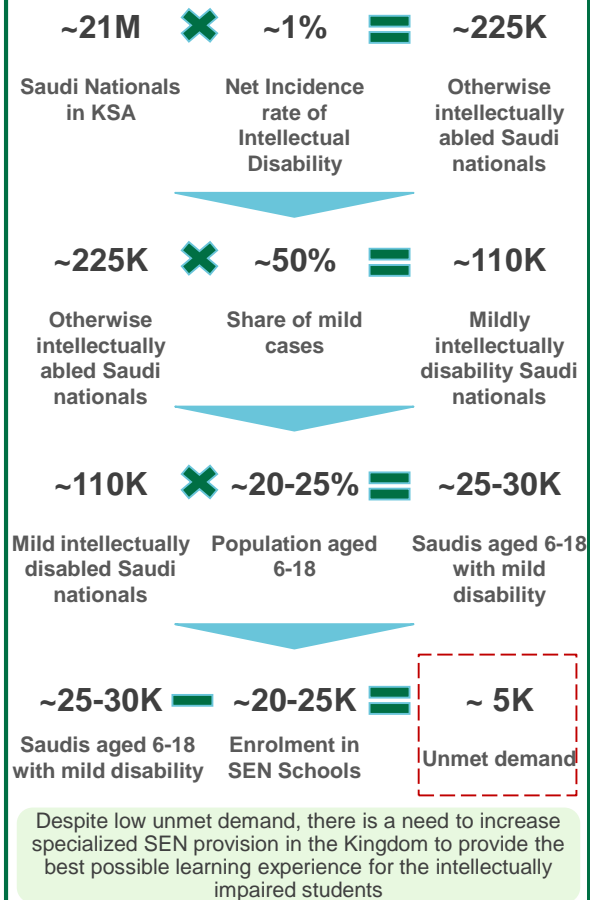
- Provision of SEN education in mainstream K-12 schools
- Enables children with special needs to have access to typical K-12 facilities in addition to specialized care and at a conducive growth and development environment



Specialized SEN Schools

- Dedicated educational facilities for children with intellectual impairments
- Trained staff with impairment-friendly infrastructure specifically for special needs education
- Ensured

Unmet demand



Case Study



ACCEL International



September 2019



Dahran



3-22 years

- Initiated by ACCEL International in partnership with ARAMCO
- Specialized center offering educational, behavioral, therapeutic, and vocational programs for children with special needs
- Additional clinical services for students not enrolled in centers



Rowad Al-Khaleej School for Special Education



Riyadh



Pearson



4-12 years

- International school offering an educational program for intellectual impairments like autism, hyperactivity, and distraction disorder
- Provision of typical K-12 facilities like outdoor playground, library and specialized facilities like speech therapy and mental health professionals

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