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Allurentis is delighted to have been involved in partnership with GREAT FUTURES, Saudi British Joint Business Council and Arab British Chamber of Commerce on this, the eighth edition of Saudi Arabia|UK - Discovering Business. We would like to thank all our sponsoring organisations for sharing their valued experience, highlighting the extraordinary opportunities available to international business in the Kingdom.

VISION 2030 – A VIBRANT SOCIETY – A THRIVING ECONOMY – AN AMBITIOUS NATION

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HRH Prince Abdullah bin Khaled bin Sultan Al Saud

Kingdom of Saudi Arabia's Ambassador to the UK



HRH Prince Abdullah bin
Khaled bin Sultan Al Saud

Built on decades of trust, and a shared strategic outlook, the Kingdom of Saudi Arabia and the United Kingdom share a special and enduring partnership. This multi-faceted relationship, continues to evolve with new purpose. Guided by innovation and the ambitions of our people, our collaboration across trade, education, technology, and culture is building not only mutual prosperity, but a shared vision of progress that extends well beyond our borders.

Our economic partnership remains at the heart of this historic alliance. Currently, Saudi Arabia is the UK's 24th largest trading partner, accounting for 0.9% of total UK trade. In the year leading up to June 2025, trade between the two countries totalled £17.2 billion, representing an increase of 5.6% or £910 million from June 2024, of which total UK exports to Saudi Arabia amounted to £14.2 billion, while Saudi exports to the United Kingdom amounted to £3.0 billion. These figures demonstrate a robust trade partnership that promises to continue to grow.

However, the relationship extends far beyond these figures, creating tangible impacts for our peoples. In its second year, the GREAT Future's campaign, brought together leaders across multiple industries from both countries, resulting in new joint commitments exceeding £3.7 billion, supporting over 4,100 jobs in the United Kingdom since its launch in 2024. This is in addition to the announcement made earlier this year of over £360 million in new projects, which are expected to unlock more than 180 new jobs.

Today, the Economic and Social Pillar of the Saudi-UK Strategic Partnership Council aims to build on this powerful momentum to advance our economic partnership and develop deeper, stronger business ties. This effort is strategically aligned with both nations' economic visions: Saudi Vision 2030, and the UK's Modern Industrial Strategy. This alignment is crucial, as we recognise that our economies are more interconnected than ever, and we cannot achieve these ambitious goals in isolation.

As Saudi Arabia advances into the next phase of Vision 2030, its economy is accelerating towards greater diversification and innovation. A new generation of entrepreneurs is reshaping industries, from clean energy and logistics to technology and the creative economy, supported by dynamic venture funds, and a thriving private sector. This transformation presents a unique opportunity for the United Kingdom to share in the next phase of our journey. Ultimately, this is a shared endeavour where our economies can grow in tandem, with a heavy focus on the industries of the future that will fuel the next industrial revolution.

For British businesses, investors, and innovators, the Kingdom now offers not only a rapidly expanding market but a genuine partnership with ambitious Saudi counterparts who share their drive for enterprise and growth. I warmly invite our British friends to explore these opportunities, to invest, collaborate, and grow with us. Saudi Arabia's transformation is no longer a vision; it is a reality unfolding, and we welcome the United Kingdom to continue being part of its remarkable success story. ■

HMA Mr Stephen Hitchen

British Ambassador to the Kingdom of Saudi Arabia



HMA Mr Stephen Hitchen

Saudi Arabia is a nation in the midst of extraordinary transformation. Vision 2030 is reshaping the Kingdom's economy and society, creating opportunities that extend well beyond business. For the United Kingdom, this is a moment to deepen a relationship built on shared ambition, mutual respect, and a continued appreciation of each other's cultures.

Our partnership is stronger than ever. The UK-Saudi Industrial Strategy Cooperation, published in 2025, reflects the clear synergies between Saudi Arabia's Vision 2030 and the UK's Modern Industrial Strategy. These shared priorities – innovation, sustainability, and skills – are delivering real results. Since the launch of the GREAT Futures campaign in May 2024, more than £10 billion of UK-Saudi deals have been announced, creating over 4,180 jobs across both countries.

Finance and energy remain central to our economic ties. Saudi Arabian issuers have raised US\$61.8bn on the London Stock Exchange up until October in 2025 alone, including more recently the PIF's debut US\$1.92bn Euro Green Bond taking the total number of Green and Sustainable capital raised by Saudi to US\$6.2bn in 2025 YTD, and US\$19.8bn since 2022. This underlined London's critical role in supporting Vision 2030

projects. Clean energy partnerships announced during the Prime Minister's visit to Riyadh in December 2024 and investments from the likes of Alfanar and Aramco Ventures' into UK clean tech, demonstrate how our collaboration is shaping a greener future.

Yet this relationship is not defined by numbers alone. Cultural and educational links are flourishing. From archaeological collaborations with Durham University and Historic England to the UK's largest-ever education delegation to the Kingdom, these exchanges enrich both societies. The opening of Strathclyde University's branch campus at Princess Noura University and 13 new education agreements signed in 2025 illustrate our shared commitment to skills and knowledge. Creative industries are also thriving, with UK exports in the sector exceeding £480 million across 59 projects.

As we look ahead, the UK remains a committed partner in Saudi Arabia's journey. Whether through cultural collaboration, sustainable technologies, or world-class education, we will continue to build connections that reflect the depth and diversity of our ties.

I invite UK businesses to explore the opportunities this dynamic market offers and to join us in shaping a future that is innovative, inclusive, and culturally connected. ■

GREAT FUTURES

معاً لمستقبل عظيم

GREAT Futures showcases how the UK and Saudi Arabia can work in partnership across multiple sectors including trade, investment, tourism, education and cultural engagement as Saudi Arabia delivers Vision 2030.

That partnership includes working together to support responsible procurement practices, waste minimization efforts, and use of renewable energy sources in order to minimise our negative impact on the environment.

Join us in making GREAT FUTURES together.

Learn more



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SAUDI BRITISH
JOINT BUSINESS COUNCIL

The Saudi British Joint Business Council

Cordelia Begbie, CEO, SBJBC



Cordelia Begbie

The Saudi British Joint Business Council is an independent and private sector-led body, which aims to develop and enhance business relations between Saudi Arabia and the United Kingdom.

Through its British and Saudi members, and its Secretariats in London and Riyadh, we offer a range of services to companies looking to expand into these markets, and provide access to high-level governmental and private sector networks in both Saudi Arabia & the UK.

We are a cross-sector Council but also include within our organisation the Saudi-UK Tech Hub, SBJBC Research Services and our Diwan Programme servicing HNWs and Family Offices.

Message from the CEO, Cordelia Begbie

The Council's mission is to promote business and partnership opportunities in both Kingdoms through

advocacy, events and thought leadership. From 12 founding corporate members in 2014, the SBJBC has grown to over 200 members across all sectors today.

Through targeted events and initiatives, we provide a platform for our members to engage with Saudi Partners in key growth areas of the increasingly diversified Saudi economy, where UK expertise is much in demand. Priority sectors include; smart infrastructure, clean energy development, technology & innovation and the fast-growing creative industries sector.

Although private sector led and financed, we work closely with both governments, particularly on implementing Saudi's Vision 2030. We welcome membership applications from both large and smaller companies, so please do consider getting in touch, joining and partnering with us.

To find out more please contact us at info@sbjbc.org ■

SAUDI ARABIA

A kingdom transformed: Investing in Saudi Arabia's economic renaissance

Saudi Arabia stands at an inflection point in its history. What was once an economy almost entirely dependent on oil revenues has embarked on one of the most ambitious and comprehensive transformation programmes ever undertaken. Vision 2030, the Kingdom's strategic blueprint for economic diversification, is not merely reshaping individual sectors, it is reimagining the country's entire economic architecture.

This transformation presents unprecedented opportunities for international investors willing to engage with a market that combines substantial financial resources, strategic geographic positioning and a firm commitment to modernisation. The scale of change is breathtaking: over £1 trillion has been invested in infrastructure and real estate development since 2016¹, while the Government has allocated record budgets across multiple sectors to support its diversification objectives.

Perhaps most significantly, the Kingdom has demonstrated that its ambitious targets are achievable. By early 2025, 87% of Vision 2030 initiatives were either completed or progressing according to schedule². This is not a case of aspirational planning. It is a carefully conceived and diligently executed strategy to reduce dependence on hydrocarbon revenues while building new pillars of economic strength.

The energy sector exemplifies this balanced approach to transformation. Saudi Arabia is building one of the world's most ambitious renewable energy programmes, while simultaneously maintaining its position as a global leader in oil and gas production. The Kingdom aims to achieve an optimal energy mix by 2030, with

gas and renewable sources each contributing approximately 50% to electricity generation. Projects such as the NEOM Green Hydrogen plant, the world's largest green hydrogen facility, demonstrate how traditional energy expertise is being leveraged to support clean energy technologies.

This dual strategy of preserving existing strengths while building new capabilities extends across the economic landscape. The financial services sector has undergone particularly rapid modernisation, with digital payments now accounting for 79% of consumer transactions and the Kingdom establishing itself as a regional fintech hub. The Saudi Stock Exchange has emerged as one of the world's ten largest exchanges, and new banking licences have attracted a wave of international financial institutions.

Mega-projects spanning transport, urban development and digital connectivity are creating entirely new economic ecosystems. The Kingdom's location connecting Asia, Africa, and Europe, combined with massive infrastructure investment, positions it as an emerging global trade hub. This natural strategic advantage is being further boosted by the expansion of King Salman International Airport, which will make it one of the world's largest aviation facilities, while the development of dedicated logistics zones aims to position Saudi Arabia among the top 10 countries globally for logistics. Similarly, projects such as the Landbridge rail link from Jeddah to Riyadh and multiple port expansions create opportunities across the entire supply chain.

The cultural and entertainment sectors, too, have seen dramatic changes, evolving from virtually non-existent industries to major

economic contributors. The tourism sector alone is projected to contribute more than 10% of GDP in 2025. The Kingdom's successful bid to host the 2034 FIFA World Cup serves as both symbol and catalyst for this broader cultural transformation.

Healthcare and education sectors are being modernised with equal vigour. The Government has committed £45.6 billion to health and social development, while pursuing ambitious digitalisation targets and expanding private sector participation. In education, meanwhile, Saudi Arabia ranks first among GCC states for educational investment, with particular emphasis on vocational training programmes aligned with economic diversification priorities.

Similarly, in the traditionally strong defence sector, established procurement relationships are evolving into strategic partnerships emphasising technology transfer and local production. With defence spending reaching £59.5 billion annually, the Kingdom is implementing aggressive localisation targets while maintaining operational effectiveness through international collaboration.

Technology and innovation are vital conduits for this transformation. The digital economy now contributes over 15% of GDP, with Saudi Arabia positioning itself as the Middle East's largest digital economy. Initiatives such as the National Data Centre Strategy and comprehensive cybersecurity frameworks, demonstrate systematic investment in digital infrastructure capable of supporting a knowledge-based economy.

What distinguishes Saudi Arabia from other ambitious development programmes is the combination of substantial financial resources, clear strategic direction, and streamlined implementation mechanisms. For international investors, particularly those from the UK, it is a market where substantial government backing combines with progressive regulatory frameworks to create compelling investment prospects, where foreign expertise is both welcomed and actively sought.



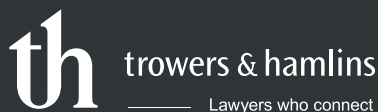
Saudi Arabia's transformation represents a comprehensive reimagining of the Kingdom's role in the global economy. This guide aims to provide international investors with the insights necessary to navigate this rapidly evolving business environment, where the opportunities are substantial and Government commitment is undoubted. The timeframe for achieving Vision 2030 objectives ensures the next five years will be critical for establishing successful partnerships in one of the most significant national development programmes of our time. ■

¹ <https://www.sbjbc.org/infrastructure-sector-2025-white-paper>

² <https://www.sbjbc.org/infrastructure-sector-2025-white-paper>



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Strategic legal advice with deep local understanding

We are particularly active in sectors central to Saudi Arabia's diversification drive – including construction, energy and real estate development – and advise on some of the most ambitious projects taking shape in the Kingdom today.

We maintain strong relationships with regulators, government bodies, and key stakeholders, and are well positioned to guide clients through complex regulatory frameworks and commercial reforms.

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Financial & Business Services: Navigating an ambitious future

Growing the size, scale and scope of the financial services sector is a central pillar of Saudi Arabia's long-term economic transformation. By strengthening this vital industry, the Kingdom is aiming to attract more foreign investment, stimulate domestic savings and capital flows, diversify revenue sources, and open up new channels of financing to support growth.

Strong strategic vision

The Government has made clear its commitment to empowering financial institutions and creating an environment where both private and public enterprises can thrive. Central to this is the Financial Sector Development Programme (FSDP), which covers areas such as banking, insurance, investment, and debt and equity markets.

Since its launch in 2018, the FSDP has delivered transformative results. The Saudi Stock Exchange, known as Tadawul, has emerged as one of the 10 largest exchanges worldwide and is listed on major international indices including MSCI, S&P Dow Jones, and FTSE Russell. A derivatives market has been established in partnership with the Capital Market Authority, while the Saudi Central Bank (SAMA) has continued to issue licences to strengthen the rapidly growing fintech industry¹.

One of the most significant milestones was achieved in 2021, when SAMA introduced the SARIE instant payment system, marking a decisive step toward Saudi Arabia's ambition of becoming a cashless economy. By the close of 2023, 70% of retail transactions were conducted without cash, beating national targets by a full year. In 2024, digital payments accounted for 79% of consumer-initiated transactions, representing 84% of the total value of consumer spending².

The current phase of the FSDP, ending in 2025, is designed to consolidate these gains. It places special emphasis on widening the financing options available to the private sector, increasing access to capital for SMEs and strengthening financial planning services. It also aims to expand the role of non-banking financial institutions from just 5% in 2018 to 30% by the end of 2025, particularly through growth in insurance, asset management, and capital markets. Alongside this, the programme is committed to improving the skills and training available to the workforce while also deepening the country's debt and equity markets³.

Beyond these goals, financial inclusion has been a central focus for the Saudi Central Bank. By 2024, the proportion of adults with access



The sector is expanding its role in supporting SMEs, with growing demand for services such as invoice discounting and alternative financing.



to a bank account soared to 94%, reflecting a major leap forward in access to financial services across the country⁴.

Rapid growth in fintech

The country has also worked hard to build its reputation as a leading regional hub for financial technology. In the first quarter of 2025 alone, local fintech firms attracted more than £300 million in funding, according to Magnitt, a Dubai-based research firm, with over 200 companies now employing upwards of 5,000 Saudi nationals⁵. Looking ahead, SAMA has set ambitious targets: by 2030, the Kingdom expects to have 525 fintech firms in operation, generating 18,000 jobs and contributing £2.5 billion annually to GDP.

Progress in this sector reflects both regulatory innovation and market dynamism. The approval of an open banking framework in 2022, followed by the launch of an open banking lab in 2023, created new opportunities for innovation by allowing third-party providers to access banking data directly via APIs. Local banks have equally embraced this shift, advancing digital services through their own development programmes, strategic acquisitions and investments in innovation hubs and incubators. Complementing this

ecosystem is the Saudi Central Bank's Regulatory Sandbox⁶, which gives companies a controlled environment to test services such as crowdfunding platforms, peer-to-peer lending and investment models, helping to accelerate the market while maintaining oversight.

Opportunities in insurance

Insurance is another area of expanding opportunity. Recognising the importance of this sector, the Government is seeking to attract more insurers and reinsurers, especially those offering property, casualty and health coverage. It has taken steps to simplify licensing and lower regulatory barriers for new entrants, while also supporting consolidation in the industry to create a more competitive environment.

A major breakthrough is expected in 2026 with the launch of the National Health Insurance Company (NHIC), which will provide state-funded, lifetime health coverage for all citizens. This reform promises universal access, removing the need for annual policy renewals, and is expected to transform the country's healthcare system. In parallel, the private health insurance market is forecast to grow five-fold, fuelled by rising demand driven by demographic expansion, an increase in

premium residency holders and the Kingdom's growing appeal as a medical tourism destination.

Banking growth

The banking sector is already among the region's strongest. The country's 10 largest listed banks reported combined net profits of £16 billion in 2024 – an annual increase of nearly 14%⁷. This impressive performance has been driven by healthy lending activity, the impact of lower interest rates and stronger debt markets.

The sector is expanding its role in supporting SMEs, with growing demand for services such as invoice discounting and alternative financing. At the same time, government reforms to the licensing process have attracted a wave of global financial institutions to the Kingdom. In recent years, new entrants have included Bank of Jordan, Bank Misr, National Bank of Egypt, Sohar International, Bank of China, Trade Bank of Iraq, Deutsche Bank, BNP Paribas, JPMorgan Chase, Standard Chartered, Emirates NBD, First Abu Dhabi, and Qatar National Bank.

Demand for investment banking services is also rising steadily. Vision 2030's large-scale projects, coupled with a growing number of IPOs, mergers and acquisitions, and structuring and restructuring deals, are fuelling this growth and highlighting the central role of financial institutions in the country's transformation.

Looking forward

By aligning bold policy initiatives with targeted regulatory reforms, Saudi Arabia has laid the foundations for a financial services



industry that is innovative, resilient and globally competitive. Ongoing digitalisation, a flourishing fintech ecosystem, and growing opportunities in banking and insurance make the country an attractive destination for global investors seeking long-term growth. ■

¹ <https://www.vision2030.gov.sa/v2030/vrps/fsdp/>

² <https://internationalbanker.com/finance/saudi-central-bank-driving-transformation-in-digital-payments/>

³ <https://globalbusinessoutlook.com/economy/saudi-vision-fsdp-track-fulfil-kingdoms-economic-diversification/>

⁴ <https://internationalbanker.com/finance/saudi-central-bank-driving-transformation-in-digital-payments/>

⁵ <https://www.business-live.co.uk/technology/saudi-fintech-rise-kingdom-looks-30068953>

⁶ <https://lenderkit.com/blog/sama-regulatory-sandbox-guide/>

⁷ <https://saudimarketresearchconsulting.com/insights/articles/saudi-banks-report-sar-79-64b-profit-in-2024>



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Neil Burbidge, Flint International CEO, Anas Al Mofleh, Flint MENA Chairman & Salahuddin Khaja, Flint MENA CEO



Neil Burbidge



Anas Al Mofleh



Salahuddin Khaja

Flint International was founded in the United Kingdom in 1999 with a clear mission: to help companies thrive by providing the operational and technical foundation needed to scale with confidence. That mission soon expanded beyond the UK, and nearly 15 years ago, we set our sights on Saudi Arabia – that called for a more thoughtful, integrated approach to expansion.

At the time, international companies were eager to enter the Saudi market but faced a maze of regulations, fragmented services, and bureaucratic delays. We knew there had to be a better way – so we built it. Today, Flint is the trusted operational partner for leading businesses establishing and growing their presence in the Kingdom. We go far beyond paperwork and processing. We provide clarity, speed, compliance, and business enablement through a unified digital platform and an experienced local team.

The way to thrive: Clarity, control, and confidence

“You focus on business, we focus on Saudi Arabia.” is more than a slogan – it’s our guiding principle. Flint enables international companies to navigate regulatory frameworks, avoid compliance risks, and establish operations without distracting from their core mission. With our platform, clients gain full visibility into every process, ensuring smooth execution and real-time insights from day one.

Laying the foundations: Market entry made simple

Flint supports the entire lifecycle of market entry and local operations. Our company formation services cover legal entity setup, licensing with MISA and ZATCA, registration with GOSI and the Chamber of Commerce, and onboarding of general managers and founders. We manage portal creation across 70-100 government systems, ensuring every compliance box is ticked efficiently and accurately.

Our end-to-end GRO and PRO services simplify complex government processes. We handle visa issuance, Iqama processing, work permits, attestation letters, and onboarding – whether employees are sponsored by Flint or the client's own entity. We also manage offboarding and compliant exits, ensuring regulatory obligations are met throughout the employment lifecycle.

Central to our offering is the Flint Client Dashboard, a secure digital window into every operational task. Clients can track the progress of visa applications, licensing steps, and other compliance processes in real time. The platform provides step-by-step updates, a centralised document repository, and automated alerts – eliminating the need for spreadsheets or informal communication channels.

Staying ahead: Proactive compliance management

We also deliver proactive compliance management. Our team monitors Saudisation targets, regulatory changes, and risk indicators, issuing weekly performance and compliance summaries. Clients benefit from early warnings, actionable insights, and a clear understanding of how policy shifts could impact their operations.

To support smooth day-to-day operations, Flint offers HR lifecycle management, payroll and WPS services, and renewal alerts for essential documents. We also provide soft landing services to help relocated employees and their families settle comfortably. From finding housing and schools to arranging SIM cards, transport, and banking assistance, we make every transition as easy as possible.

Our local business enablement services help clients accelerate market traction. We assist with office setup, website localisation, ecommerce integration, and introductions to vetted vendors. By embedding companies quickly and credibly into the local business ecosystem, we position them to scale from the outset.

Globally local support: A true strategic partner

What sets Flint apart is our end-to-end approach and the transparency we bring to every interaction. Our clients don't have to chase updates or wonder what's happening behind the scenes. Our dashboard shows them everything in real time. We work proactively – flagging compliance risks before they escalate, recommending mitigation strategies, and guiding clients through every regulatory change.

We don't just handle administrative tasks – we manage the entire employee journey. From visa sponsorship to onboarding, operations, and exit, Flint ensures employees are supported and compliant throughout. Whether operating under Flint's sponsorship or their own entity, our clients benefit from smoother execution, lower costs, and improved employee experiences.

Flint is more than a GRO/PRO service provider. We are a strategic partner, offering shared services, managed operations, and project support across key sectors like telecoms, IT, energy, defence, retail, and construction. We've helped businesses deliver large-scale digital transformation, workforce mobilisation, and infrastructure projects across the Kingdom.

Your path to confident expansion in Saudi Arabia

Saudi Arabia offers tremendous opportunity – but it also demands precision, clarity, and regulatory expertise. Flint enables businesses to grow without distraction. Our unified platform, expert team, and proactive service model give clients the operational confidence they need to focus on what matters most: scaling their business.

We're proud of the journey Flint has taken – and we're even more excited about what's ahead. If you're planning to expand into Saudi Arabia, now is the time to start a conversation. We don't just get you into the market – we help you thrive in it. ■

Digital & Technology: Advancing the digital agenda

Saudi Arabia is pursuing an aggressive digital transformation strategy that extends far beyond government modernisation to reshape the entire economy. The National Transformation Programme is digitising core administrative functions, from property registration to judicial processes, as part of Vision 2030's broader economic diversification goals.

This comprehensive approach has established the Kingdom as the Middle East's largest digital economy, with the digital sector now contributing over 15% of GDP¹, well ahead of original targets. Its strategic location between Europe, Africa and Asia reinforces its ambition to become a regional technology and cloud computing hub.

The regulatory framework reflects this digital-first approach. The Ministry of Communications and Information Technology (MCIT) sets overall ICT policy, while specialised bodies such as the Saudi Data and AI Authority drive AI strategy and the National Cybersecurity Authority protects critical infrastructure. This coordinated institutional structure ensures aligned policy implementation across the technology ecosystem.

Investment momentum builds

LEAP 2025, an annual international event in Riyadh focused on innovation and investment in AI, digital and technology, demonstrated

the Kingdom's growing appeal to global technology investors, generating nearly £20 billion in commitments². The scale of investment, from Google's planned AI hub to major manufacturing partnerships, reflects confidence in Saudi Arabia's digital infrastructure and regulatory environment.

The Government's proactive and supportive approach to entrepreneurship, particularly in the tech arena, is exemplified by the Garage startup ecosystem, which provides comprehensive support for over 300 companies across fintech, logistics, e-commerce and emerging technologies³. This strategy combines infrastructure investment with regulatory support to create sustainable innovation clusters.

Key policy drivers include the Cloud First initiative launched in 2019, which mandates government agencies adopt cloud solutions, creating a substantial domestic market for international providers. Similarly, the Kingdom's £11 billion data centre development plan⁴ positions Saudi Arabia as the region's digital infrastructure hub.

The National Data Centre Strategy, unveiled in June 2025, is a major digital infrastructure initiative intended to position the country as a regional leader in cloud computing and AI. The strategy, spearheaded by the MCIT in collaboration with the Saudi Data and Artificial

Intelligence Authority (SDAIA), sets the ambitious goal of building up to 1.5GW of data centre capacity by 2030, making it one of the largest planned national builds in the Middle East⁵.

This initiative directly supports Vision 2030, and represents a significant opportunity for companies in the ICT sector, particularly those specialising in cloud services, data centre equipment, AI chips, green energy systems and cybersecurity solutions.

Strategic sector development

Cybersecurity has evolved from a defensive necessity to a strategic growth sector. The National Cybersecurity Authority's regulatory framework requires thousands of businesses to implement enhanced security measures, creating substantial market opportunities. Saudi Arabia's perfect score on the UN Global Cybersecurity Index reflects the success of this policy-driven approach⁶.

The regulatory requirements span critical sectors including government, finance, healthcare and energy, with particular focus on application security, cloud protection and infrastructure resilience. This creates opportunities for international providers while building domestic cybersecurity capabilities.

Smart cities and IoT development is central to Vision 2030's urbanisation strategy. The Kingdom is currently building several smart cities (including NEOM, Red Sea, Qiddiya, Waad Alshamal, and SPARK), and aims to be the world's most connected and digitised nation by 2030⁷. This represents a comprehensive reimagining of urban development rather than incremental technology adoption.

The IoT strategy focuses on industrial applications, predictive maintenance, asset tracking and warehouse optimisation – sectors where Saudi Arabia's oil and gas expertise provides natural advantages for technology deployment.



Infrastructure as competitive advantage

Saudi Arabia's 5G rollout underpins its success in driving large-scale digital transformation. The Kingdom was among the first regionally to launch 5G networks in 2019, with coverage now extending beyond major cities to create nationwide connectivity.

The 5G infrastructure strategy supports the smart city agenda while enabling industrial IoT applications across its major economic sectors. Operators such as Zain KSA are expanding coverage using low-band spectrum to overcome geographical challenges.

Cloud computing policy demonstrates how regulatory frameworks can accelerate market development. The Cloud First Policy created



The 5G infrastructure strategy supports the smart city agenda while enabling industrial IoT applications across its major economic sectors.



immediate demand, while the Government's data centre investment strategy ensures sufficient infrastructure capacity. This combination of demand stimulus and supply-side investment has attracted major international cloud providers to establish regional operations in Saudi Arabia. Its total digital infrastructure investment programme has transformed connectivity, with mobile internet speeds now ranking among the world's top performers. This infrastructure foundation supports broader digital economy development across all sectors.

Digital economy expansion

E-commerce growth illustrates how policy frameworks are facilitating rapid market development. The sector has expanded significantly, driven by improved digital payments infrastructure and logistics capabilities. The Financial Sector Development Programme's focus on cashless transactions, for example, has accelerated digital payments adoption well beyond original targets.

Vision 2030's target of 70% cashless transactions is symbolic of the Government's commitment to digital-first economic policies. This creates opportunities across payments infrastructure, e-commerce platforms and digital financial services.

The e-commerce ecosystem now includes over 40,000 registered businesses, supported by improved logistics networks and enhanced small business capabilities⁸. This demonstrates how comprehensive policy approaches that combine payments infrastructure, logistics support and regulatory frameworks can rapidly develop new economic sectors.

Saudi Arabia's approach to nurturing the development of its digital and technology sectors demonstrates how coordinated government strategy, regulatory frameworks and infrastructure investment can accelerate digital transformation while creating sustainable economic diversification beyond its traditional energy strengths. ■

¹ [https://mep.gov.sa/files/en/KnowledgeBase/EconomicReports/Documents/\(Q1\)%202025%20Report%20-%20ENG%20-%20final-04.pdf](https://mep.gov.sa/files/en/KnowledgeBase/EconomicReports/Documents/(Q1)%202025%20Report%20-%20ENG%20-%20final-04.pdf)

² <https://www.arabnews.com/node/2589574/business-economy>

³ <https://www.trade.gov/market-intelligence/saudi-arabia-ict-new-data-center-strategy-accelerate-ai-and-cloud-expansion>

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Tysers Saudi is based at the 29th Floor, Hamad Tower, Riyadh, Kingdom of Saudi Arabia.

Tysers – protecting the present and empowering the future

Labeed Alhusainy, General Manager, Tysers, Saudi Arabia



Labeed Alhusainy

Tysers has been at the forefront of international insurance broking for more than 200 years. This incredible heritage has shaped a client-first culture, and inspired a firm focus on the future through a data-driven, analytical approach to mitigating risks.

Headquartered in London, an international network of offices with sector specialists delivers tailored solutions powered by local knowledge and market insight. The teams provide expert advice on all aspects of insurance, reinsurance and risk management for complex risk placements.

Tysers is proud to be a member of the AUB Group, an ASX200 listed group of (re)insurance brokers and underwriting agencies. Tysers, with AUB, has a global reach of 140 countries, operates in ~600 locations with 6,000 colleagues placing US\$7.2 billion+ GWP for around 1.2 million clients

Saudi Arabia operation

Tysers' Saudi Arabia operation, **Tysers for Reinsurance Brokerage (LLC)**, was established in 2011. Headquartered in Riyadh and regulated by the

Saudi Insurance Authority, the office is led by General Manager, Labeed Alhusainy.

A highly experienced local team supports the Saudi market by providing specialist reinsurance solutions designed to underpin the country's Vision 2030 objectives. Owned 60% by Tysers Group, Tysers for Reinsurance Brokerage is deeply committed to strengthening Saudi Arabia's economic landscape by supporting diverse industries, helping businesses mitigate risks, and enabling sustainable growth across sectors vital to the nation's economic diversification plans.

Transparency and integrity

Transparency and integrity are key to the team's approach. Trusted relationships are built with clients and partners through honest communication and clear, straightforward advice. Labeed and his team take an individual approach to each client's risks. They work closely with clients to understand their unique needs and always put their best interests first. This client-centric philosophy underpins every tailored reinsurance solution and fosters long-term success and confidence.

Tysers' regional presence is powered by local expertise with the support of an established global network. This allows the team to craft innovative risk management strategies that address sector-specific needs, especially within The Kingdom's emerging industries such as tourism, cultural and entertainment sectors including sports, e-sports, music events, exhibitions, and media production. Tysers is dedicated to supporting the innovative and transformative projects that are central to Saudi Arabia's strategic development roadmap.

Strategic importance of the Middle East

"We recognise the strategic importance of the Middle East, and we are actively investing in strengthening our regional capabilities," advises Labeed. "Our goal is to serve as a trusted advisor, facilitating seamless trade and investment flows between Saudi Arabia and the UK. We are committed to supporting Saudi companies seeking opportunities abroad and British firms looking to enter or expand within the Saudi market."

Supporting the ambitious vision of Saudi Arabia, the team focuses on providing comprehensive risk solutions for emerging risks associated with the country's rapid growth and diversification efforts. Through innovative underwriting and tailored strategies, Tysers helps manage risks connected to both conventional and new sectors, infrastructure development, technological advancements, and other evolving landscapes ensuring resilience and sustainable development.

Tysers is dedicated to fostering stronger economic ties between the UK and Saudi Arabia. Our unwavering commitment to transparency, personalised service, and innovative risk management positions us as a trusted partner in supporting Saudi Arabia's Vision 2030 and the broader goals of economic diversification and regional growth.

Tailored risk management solutions with a client-first service

Tysers provides specialist reinsurance and insurance solutions to support the Kingdom's economic diversification and growth. We offer a wide range of insurance products, including marine, construction, casualty, and cyber risk, to support local businesses and large-scale projects including renewable energy and infrastructure development.

Tysers in Saudi Arabia has access to Lloyd's of London and international markets through our network of international offices.

Labeed Alhusainy

Labeed joined Tysers in 2022 and is the General Manager of Tysers in Saudi Arabia. He joined Tysers from Tawuniya where he held senior leadership roles.

A highly skilled market practitioner with more than 15 years of industry experience, Labeed is proud to support the Saudi Arabia economy and Vision 2030 with strategic risk management and reinsurance brokerage services.

He leads a talented team of sector and technical experts. ■

The Middle East Association (MEA)

The Middle East Association (MEA) is a longstanding UK-based organisation dedicated to strengthening relations between the United Kingdom and the Middle East and North Africa (MENA) region across trade, investment, diplomacy, and culture.

Founded in 1961 by the British Government, the MEA has evolved into a respected, independent platform supporting engagement between business, government, and institutions across the region. Today, the MEA plays a vital role in connecting UK organisations with regional partners, facilitating dialogue, and promoting commercial and policy collaboration in a rapidly changing geopolitical landscape.

The MEA's influential network spans government, politics, business, academia, media, and think tanks, providing members with access to high-level decision-makers and timely insights. Through a year-round programme of events, briefings, and roundtables, the MEA offers opportunities to exchange ideas, build partnerships, and identify emerging opportunities across key sectors such as energy, finance, technology, education, and infrastructure.

Among the MEA's flagship initiatives, the Parliamentary Reception – held annually at the House of Parliament – serves as a distinguished cross-party forum bringing together Members of Parliament, ambassadors, and senior business leaders to discuss the evolving UK-MENA relationship. The Ambassadors' Reception unites British and Arab envoys with the wider diplomatic and corporate community,

fostering collaboration and mutual understanding. Each November, the Gala Dinner provides a black-tie occasion for senior policymakers, executives, and investors to celebrate UK-Middle East partnership and recognise the year's achievements.

In 2026, the MEA will proudly relaunch the MEA UK Roadshow – an ambitious, nationwide series of business forums taking the organisation's mission beyond London. With events in Birmingham, Manchester, and Edinburgh, the Roadshow will connect British SMEs and investors with opportunities across the Middle East and North Africa, featuring expert panels, one-to-one consultations, and partnerships with embassies, regional chambers, and leading corporate sponsors.

The MEA is led by Nicholas Hopton, Director General and former UK Ambassador to Qatar, Libya, Iran, and Yemen, supported by an executive team and an Advisory Board of distinguished business and policy figures. The Honorary President is Sir Mark Moody-Stuart, former Chairman of Shell and Anglo American.

Following its successful relaunch in 2024, the MEA continues to grow its network and global partnerships, offering a modern and inclusive platform for organisations and individuals who value access, insight, and influence across the MENA region. To learn more, get involved, and discover how the MEA can help you build connections and boost your business in the Middle East, visit www.the-mea.co.uk



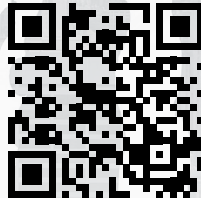
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SCAN & JOIN TODAY

Mrs Rita Massoud

Interim Secretary General & CEO, Arab British Chamber of Commerce



Mrs Rita Massoud

The Kingdom of Saudi Arabia's Vision 2030 is driving one of the most ambitious national transformations in modern history. With a substantial agenda to diversify its economy, embrace innovation, and invest in next-generation infrastructure, the Kingdom is rapidly emerging as a global hub for smart cities, advanced technologies, and sustainable development.

This transformation is opening up unprecedented opportunities for international collaboration and UK businesses are well placed to contribute. As Saudi Arabia develops further its economy across sectors and regions, the potential for deeper UK-Saudi cooperation has never been greater.

The Arab British Chamber of Commerce is proud to support this evolving partnership. For 50 years, the Chamber has worked to connect UK businesses with opportunities across the Arab world. As we mark our golden anniversary in 2025, our mission remains focused: to facilitate trade, build relationships, and

provide practical support for businesses engaging with the region.

Under my leadership, the Chamber is entering a new phase of growth focused on expanding member value, deepening partnerships, and modernising to meet the needs of today's global economy.

At the Chamber, we have also been closely involved in the ongoing UK-GCC Free Trade Agreement negotiations, representing business interests and helping shape a framework that will strengthen bilateral trade and long-term investment. We will continue to support this vital process and ensure that the private sector is fully equipped to benefit from the opportunities it brings, particularly in key markets like Saudi Arabia.

This guide offers timely, practical insights into Saudi Arabia's dynamic economic landscape and complements our wider efforts to strengthen Arab-British business ties. We look forward to working with more UK companies as they explore this exciting and fast-evolving market. ■

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Your trusted partner for business success in Saudi Arabia

Team Players People Solutions

Expanding into Saudi Arabia presents tremendous opportunities – but also unique challenges. From navigating complex labour laws to finding the right local talent, success depends on having a partner who truly understands the Kingdom's dynamic business landscape. That's where **Team Players People Solutions** comes in.

At Team Players, we specialise in helping international and local organisations establish, grow and thrive in Saudi Arabia through innovative HR and recruitment solutions. Our mission is simple: to make your market entry seamless, compliant and strategically aligned with your business goals.

End-to-End HR Support for Market Entry

Setting up operations in a new country can be daunting. We streamline the entire process by providing **end-to-end HR infrastructure support** – from regulatory guidance, visa processing to localisation and Saudisation compliance. Our experts ensure your organisation meets all legal and cultural requirements, so you can focus on building your business with confidence.

We also help businesses source and retain the right talent that aligns with local regulations whilst also reflecting their global corporate culture. We are experts in sourcing local and international talent for Energy + Utilities, Tourism + Hospitality, Professional Services, Tech + Telcos, Construction + Real Estate and Transport + Logistics environments. Whether it's consulting to create

the right employment contracts, building out your workforce, or implementation of HR policies, our solutions ensure full operational readiness from day one.

Strategic Recruitment That Delivers Results

At the heart of every successful organisation lies its people. Our recruitment division leverages cutting-edge tools, local expertise and an extensive talent network to help you find the right professionals quickly and efficiently.

We don't just fill vacancies; we build teams. Our consultants take time to understand your company's vision, culture and strategic priorities, ensuring every hire strengthens your long-term growth. From executive search and volume hiring with our RPO solutions to specialised roles across sectors, our **customised recruitment strategies** deliver the best-fit talent for your business.

Partnering for Vision 2030

With years of experience in Saudi Arabia and a deep understanding of Vision 2030's evolving landscape, Team Players People Solutions is more than a service provider – we're your strategic partner in success.

Let us help you build strong foundations, attract top talent and unlock your business potential in the Kingdom.

Team Players People Solutions – Empowering businesses, enabling people and driving success in Saudi Arabia. ■

NAME

namearchitecture.net



Designing context: NAME Architecture's approach to Saudi Arabia's evolving landscape

Nathalie Rozencwajg, Founder, NAME Architecture



Nathalie Rozencwajg

A conversation with Nathalie Rozencwajg, founder of NAME Architecture, about heritage-inspired design, working in the Middle East, and supporting the delivery of Saudi Arabia's ambitious vision.

Can you tell us about your journey establishing NAME Architecture?

I established NAME about eight years ago, after 12 years as co-head of a previous practice, so I've been running an architectural firm for 20 years now. I also taught at the Architectural Association in London, where I studied. This academic connection means research and researching though design has always been central to our work.

As a practice, we are particularly interested in new approaches to the evolution of cities – places with long, embedded histories and complex social and regulatory contexts.

Your work on Bethnal Green Town Hall Hotel in London won numerous awards. What made it so challenging?

The Town Hall Hotel project was the epitome of our philosophy and an incredible opportunity for a relatively young practice. The challenge was to transform an iconic historic building into a hospitality venue while respecting its heritage value. The original building was very eclectic,

with different architectural styles. We studied the existing building intensively – its materials, fabrics, motifs – and used these as departure points for new ideas.

The positive dialogue we established with the authorities enabled us to show that drawing inspiration from the existing building and extending it with contemporary elements would secure its long-term future as a hospitality venue.

How does your approach to heritage and contemporary intervention inform your work in Saudi Arabia?

Our approach to heritage and context is fundamentally about storytelling – continuing a narrative, responding to what's already there or to a place's intention. Whether we're working at an ultra-modern site like NEOM or with a listed building in Europe, it's about creating a dialogue through design with that particular place and telling its story through architecture.

What are the biggest differences in Saudi Arabian architecture and design traditions?

I think the appreciation of materials and traditions is very different. Particularly the way construction reflects the diverse climatic and environmental conditions. There's a beauty in achieving amazing spatial emotions through shade and light, through the way shadows fall on walls

or light filters through spaces. Creating meaningful experiences with very few elements is incredibly powerful.

The relationship to landscape is also crucial – the space that encloses you but also the views framed through it. It's interesting to rethink our processes through these subtle interventions, working with less rather than more.

Tell us about some of your recent projects in Saudi Arabia

We've worked on numerous projects in NEOM, contributing our design expertise within some of the region's most innovative development teams. One of the highest profile ones is Aquellum, a 100,000m² mixed-use facility carved inside a mountain on the Gulf of Aqaba. It's fascinating and challenging because it's completely hidden. We're designing an interior journey in which the building itself defines the experience, culminating in panoramic views at the top. The building is about 100 metres high, so we're designing solutions to bring natural light into such deep spaces as you emerge from the bottom and make your way up.

Another exciting project is in AIUla, where we've worked on competition designs for exemplary housing, exploring how to create a signature house that serves as a landmark while preserving residents' privacy. We rethought the courtyard typology, framing views toward the Nabatean 'lion tombs', while working with traditional materials in contemporary layouts.

We've worked in AISuda in the south, too, which has a beautiful heritage of taller structures built alongside mountains, designing a new hotel that maintains the spirit of what AISuda is known for within contemporary development.

We've worked in Oman as well, which has a similar sensitivity to embedding developments in strong cultural and landscape contexts.

What makes the Middle Eastern market particularly exciting?

For architects and designers, being able to participate in visionary projects is an amazing opportunity that leaves a legacy in societies and

in architecture. I don't know if we'd necessarily have the opportunity to work on projects of such scale and vision in Europe.

For us, it's always about the relationship with landscape. Clients usually have extensive experience travelling throughout the Middle East and globally. They want to bring what they've seen elsewhere and make it particular to their context and site. In hospitality projects, they acknowledge that their guests have also travelled extensively worldwide, so the question becomes: what can they offer that's specific to their region? This extends to programmatic levels – which programmes combine with hospitality to offer something unique?

How integral is sustainability to your design process?

It's everywhere in our work. Sustainability isn't an add-on for us, it's there in the initial approach to a site. We think about where the wind flows, the sun shines, the shadows fall. What can we learn from the site? How do we avoid excessive excavations? These constraints are creative – they're what the design emerges from.

We maintain a huge material library focused on new materials being developed with recycled elements; materials from local sites being recycled for construction. At Aquellum, for example, because the structure is being carved out of a mountain, much of our work on materiality is focused on reusing the stone itself in different ways, whether in surface materials or furniture.

We also think long-term about how something can be adapted in the future without complete demolition. If a building needs transformation later, how do we enable that with minimal waste?

What's next for NAME Architecture in Saudi Arabia and the wider region?

Our ambition is to continue evolving and establish a base in Saudi Arabia that can serve the Kingdom and, in time, the region as a whole. We want to continue contributing to these visionary projects while working closely with local expertise and the next generation of Saudi designers and architects. ■

Infrastructure: A bold vision transforming landscapes and industries

Saudi Arabia's infrastructure sector is at the heart of the Kingdom's ongoing transformation, acting as both catalyst and cornerstone for its Vision 2030 ambitions. Over the past decade, infrastructure investment has surged. As of 2024, the sector itself was valued at £26.5 billion, with forecasts predicting a rise to £33 billion by 2029, linked to an estimated £1.3 trillion in projects planned or underway¹.

The Government's commitment is reflected in record budgets and multi-billion pound opportunities for international partners. More than £1 trillion has been invested in real estate and infrastructure since 2016, with 87% of Vision 2030 initiatives either completed or on track as of early 2025².

This growth is visible in every aspect of the nation's built environment. Road and rail networks are rapidly expanding, connecting booming cities and fast-growing industrial hubs.

Smart cities and digital infrastructure are another strategic pillar, redefining urban sustainability, digital connectivity and renewable

energy use. Cultural and sporting assets, too, are being expanded through grand venues, from Qiddiya Entertainment City to world-class stadiums, reflecting a wider push to enhance quality of life and diversify the economy. Saudi Arabia's successful bids for global events like Expo 2030 and the FIFA World Cup 2034 provide a further stimulus for investors.

Major 'giga projects' currently underway include NEOM, a futuristic smart city in the north-west of the country spanning over 26,500km². Designed as a 'living laboratory' for entrepreneurship, innovation and sustainability.

Qiddiya Entertainment City near Riyadh is positioned as a global destination for entertainment, sports and the arts. Covering 376km², it aims to redefine destination cities, create new professional pathways and offer immersive experiences, especially for Saudi youth⁴.

Culture is also at the heart of Diriyah Gate, a £35 billion project centred around the historic UNESCO World Heritage site of Diriyah,

near Riyadh. It aims to celebrate Saudi heritage, culture and identity, comprising cultural attractions, galleries, restaurants and hotels. It is expected to create thousands of jobs and significantly contribute to GDP.

With a focus on the Kingdom's fast-growing tourism market, plans for the Red Sea Project along the Red Sea coast include luxury resorts, islands and hotels, with an emphasis on eco-friendly integration and sustainable tourism, aiming to attract environmentally aware tourists and create jobs in the region⁵.

Meanwhile, the New Murabba project is developing a commercial and cultural district in Riyadh, covering 19km² and featuring the striking, cube-like 'Mukaab' structure, with residential, business and entertainment spaces connected by smart transportation.

In addition to these, Saudi Arabia is advancing with other significant developments in energy and infrastructure. These include the King Salman Energy Park (SPARK) and the expansion of King Salman International Airport, which is set to become one of the largest airports in the world. As well as handling up to 100 million passengers annually, the airport will serve as a major gateway for international travellers and air freight.

Investing in the road network

There are over 72,400km of paved roads in Saudi Arabia. Some 4,900km of these are motorways, while two-thirds are single-lane roads, many of which the Government is planning to upgrade into two-lane highways. There are also around 145,000km of dirt roads.



Improving the road network is vital not only to drive growth in logistics, but also to provide better passenger transport options. The Government has launched an investment programme to develop a nationwide bus network connecting over 200 locations via 76 separate routes. These intercity services are designed to transport up to six million passengers annually, reducing the number of car journeys and contributing around £680 million to annual GDP.

The Government has also announced four significant motorway tenders as part of its privatisation and PPP efforts, overseen by the



Improving the road network is vital not only to drive growth in logistics, but also to provide better passenger transport options.



Ministry of Transport and Logistics Services. These are Jeddah-Mecca (64km), Yanbu-Jubail (447km), Asir-Jazan (137km) and Jeddah-Jazan (571km), all of which are expected to significantly reinforce the Kingdom's high-capacity road transport capabilities.

Rail expansion on track

It's not only the road network that is benefitting from massive investment. The Government also has ambitious plans to expand rail capacity.

The country's rail network is managed and operated by Saudi Arabia Railways (SAR), overseen by the Government's Public Investment Fund. SAR manages and operates the country's main North-South railway line, a 2,736km network which runs through the centre and east of the Kingdom, connecting Riyadh to Al Hadithah at the Jordanian border.

SAR has set out its plans to add more than 8,000km of new track⁶ and double passenger and rail capacity. There are also plans to modernise

the network with the latest technology and advanced solutions to reduce its environmental impact.

The ambitious Landbridge Project aims to directly connect the Red Sea (Jeddah) to the Gulf (Dammam), revolutionising rail freight transport across the Kingdom. The Landbridge will significantly reduce cargo transport times between the two coasts, providing a vital boost to domestic and regional supply chains.

Collaborative approach

With world-leading giga-projects, broad private sector engagement and a determination to build for the next generation, Saudi Arabia is positioned to become one of the most dynamic and future-ready infrastructure markets globally. The scale and ambition of current plans, from smart cities and major transport schemes to landmark cultural projects, make the Kingdom a destination of choice for investors, innovators and talent, offering opportunities unrivalled across the region or beyond. ■

¹ <https://www.sbjbc.org/infrastructure-sector-2025-white-paper/>

² <https://www.sbjbc.org/infrastructure-sector-2025-white-paper/>

³ <https://www.pif.gov.sa/en/our-investments/giga-projects/>

⁴ <https://qiddiya.com/qiddiya-city/>

⁵ <https://www.redseaglobal.com/en/>

⁶ <https://www.railjournal.com/financial/saudi-arabia-seeks-private-partners-for-future-railway-investment/>

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Ensuring the safe and secure delivery of major projects across KSA

Christopher Sherwood, Regional Director, ESSURA



Christopher Sherwood

Enhancing security, safety, and operational effectiveness in major building projects, transport systems and industrial complexes is a core mission for global consultancy business ESSURA. Regional Director, Christopher Sherwood, explains how its risk identification, physical and technical solutions are supporting many of the major developments in KSA.

Could you outline the history of ESSURA and explain its key services?

ESSURA is a British-owned company with offices in the UK and Middle East that traces its history back to 2001. The name ESSURA is derived from Engineering Safety & Security Assurance – and reflects our focused mission of delivering expert security, safety, and operational effectiveness worldwide.

Our key services are specialist Safety, Security, and ICT Consultancy. ESSURA is a trusted partner for the top international engineering consultancies, project management consultancies and developers, and we advise on a wide range of projects including city masterplans and infrastructure, mixed-use

developments, rail, airports, ports, stadia, hospitality, and government.

Why is it so important for developers and project managers to bring in a firm like ESSURA?

ESSURA brings deep technical knowledge with extensive experience specific to the Middle East. Our subject matter experts come from various backgrounds including military, policing, academia, engineering, and technology. Partnering with ESSURA means embedding world-class safety, security, technology, and resilience into a development from its inception, and ensures regulatory compliance.

How is technology blurring the lines between physical, cyber and digital trust?

Technology has created a complicated inter-connected risk landscape that must be navigated strategically. Physical safety, cybersecurity, and digital reliability are now so intertwined that a failure in one domain can instantly undermine trust in the others.

Smart infrastructure, the Internet of Things (IoT) and the rapid uptake of AI mean a cyber breach can now cause

physical harm, and digital trust is no longer just about data privacy and reliability of digital interactions. A breach in a “smart city” can affect public safety, privacy, and perception of trust city-wide. So, digital trust strategies must be architected from the start, to ensure true resilient and secure convergence.

What do you see as the unique security challenges of the region?

The Middle East, and Saudi Arabia (KSA) in particular, faces a unique mix of security challenges shaped by its geopolitical position, rapid economic transformation, and regional threats, particularly tensions with Iran, Yemen, Israel/Gaza, and broader instability for example in Syria and Lebanon.

KSA is rapidly evolving its physical security and cyber security regulations, but alignment across sectors is still underway, so developers and operators must navigate complex, shifting requirements while aligning with global standards. The Kingdom’s biggest challenge is managing modern, integrated security systems that scale across digital, physical, and operational domains, while under a global spotlight – the whole world is watching to see if it can be a success.

Is Vision 2030 influencing demand for security and ICT engineering in projects across KSA?

Absolutely – Vision 2030 is a major driver of increased demand for security and ICT engineering across projects in Saudi Arabia. Projects like NEOM, The Line, Diriyah Gate, and Qiddiya are unlike anything previously attempted in the region. These giga-projects are set to be true smart cities that will depend on inter-connected digital infrastructure at a scale not seen anywhere else.

The scale, complexity, and ambition of projects mean that security, safety, and digital trust are foundational and not optional. They require robust and sophisticated security frameworks that are adaptable and future ready. We are building infrastructure today for the technology of tomorrow – technology that doesn’t even exist yet.

Some of the construction timelines for these huge projects mean that equipment specified today will likely be obsolete by the time it comes for installation.

What is ESSURA’s role in KSA’s flagship Diriyah Gate development?

ESSURA was initially commissioned on Phase 1 to produce the strategy and guidelines for sitewide security. Now we are designing all public realm security. This has extended to Phase 2 where we are part of the city-wide ICT consultancy team and responsible for security strategy and ensuring design compliance with Diriyah Company’s security regulations and local laws.

What effect does culture have in influencing design and delivery in KSA?

Delivery in KSA is fast-paced and demanding, requiring teams to be dynamic and flexible. While digital conferencing systems are used extensively, in-person interaction is still important to clients, and strong personal relationships lead to successful projects.

Saudi society still places a strong emphasis on personal privacy, and this must be balanced with the need for widespread public surveillance and access controls. This influences CCTV placement, the use of facial recognition (for example when face coverings are used), and access screening procedures. Systems must be discreet, respectful, and culturally sensitive.

Why should a developer or project manager choose ESSURA and what makes you different?

ESSURA has deep regional experience with a global footprint. We can draw from hundreds of specialists internationally to ensure the absolute best service to our clients. We understand the cultural, regulatory, and operational environment of the Middle East, and deliver with UK-led governance and engineering rigour. Most importantly, we are independent, and not linked to any product vendors or system integrators. ■

Entertainment, Sport, Tourism & Culture: Vision of the future

Saudi Arabia's entertainment, sports, tourism and cultural sectors have seen enormous progress over the last decade. Under Vision 2030, the Kingdom has not merely achieved its aspirations, it has reshaped its identity into a vibrant global destination for leisure, culture and sport.

In 2025, the tourism sector is projected to contribute more than 10% of the country's GDP, injecting £89 billion into the economy¹. The sector now employs 2.7 million people, representing one in five jobs across the country. This success stems from the Vision 2030 goal of attracting 100 million visitors annually seven years ahead of schedule in 2023, with the target subsequently revised upwards to 150 million visitors by 2030². The economic impact has been transformative, with total tourism spending reaching approximately £57 billion in 2024³.

Entertainment and sports revolution gains momentum

The entertainment sector's transformation has accelerated significantly, with the General Entertainment Authority unveiling 29 investment opportunities targeting six key sectors: facilities, destinations, water parks, adventure parks, virtual reality parks, and e-gaming centres. Vision 2030 aims to transform the sector by increasing household spending on recreation from 2.9% to 6% by 2030.

The revolution was kick-started with the 2018 decision to end a 30 year ban on cinemas. By 2024, the sector had evolved far beyond its initial scope. In just five years, for example, the Red Sea International

Film Festival has become a major cultural event, featuring 125 films and attracting 40,000 attendees annually.

In the sports arena, the Saudi Public Investment Fund (PIF) has become a dominant force in global sports, with £730 billion in assets under management and at least 346 sponsorships across international sports in 2024⁴. The Kingdom's football ambitions received ultimate validation when FIFA announced Saudi Arabia as host of the 2034 FIFA World Cup in December 2024. To host the tournament, the country plans to build 11 new stadiums and refurbish four existing venues across five host cities: Riyadh, Jeddah, Al Khobar, Abha, and the futuristic smart city NEOM. The crown jewel will be the 92,000 capacity King Salman International Stadium in Riyadh, designed to host the opening and final matches.

Recent sporting achievements demonstrate tangible returns on PIF's investments. Al-Ahli Club triumphed as AFC Champions League Elite champions, while Al-Hilal Club achieved a historic victory over Manchester City in the 2025 Club World Cup, described as a pivotal moment in global football. These successes complement PIF-owned Premier League club Newcastle United's return to major tournaments after decades, showcasing the impact of strategic Saudi investment when effectively managed.

The Saudi Pro League has itself become a global attraction in football, with the Government aiming to increase the league's revenue from £95 million in 2022 to more than £380 million by 2030, while nearly

tripling its market value to £1.7 billion. PIF took majority control of four clubs: Al-Ittihad, Al-Nassr, Al-Hilal and Al-Ahli, while major corporations including Aramco will manage additional clubs.

Beyond football, Saudi Arabia has secured major events across multiple sports. The Kingdom hosted the WTA tennis finals in November 2024, bringing eight of the world's top singles and doubles players to Riyadh. PIF announced partnerships with both the ATP and WTA tours, with the fund becoming the official naming partner of ATP Rankings and sponsor of premier events including Indian Wells, Miami, Madrid, Beijing, and the ATP Finals⁵.

Gaming and esports: the digital frontier

Saudi Arabia's gaming sector is another fast-growing powerhouse, generating £9.5 billion in revenue in 2024, around 20% of MENA's gaming revenue. The market is projected to reach £13.1 billion by 2028, while the National Gaming and Esports Strategy aims to contribute £10.6 billion to GDP and create 39,000 jobs by 2030⁶.

The inaugural Esports World Cup held in Riyadh in 2024 featured a £48 million prize pool, the largest in esports history. The 2025 edition increased this to £56 million, featuring 25 competitions with 2,000 elite players and 200 clubs from over 100 countries.

NEOM is establishing the region's first comprehensive gaming hub, featuring state-of-the-art development studios, motion capture facilities, and incubation zones. A joint venture with MBC Group is creating a AAA game development studio for high-value games targeting local and international markets.

Mega-projects reshaping the landscape

The country's flagship tourism initiative is the Red Sea Project, spanning some 30,000km² along the western coast. Phase One launched in Spring 2024, with the development ultimately featuring 8,000 luxury hotel rooms by 2030. The project operates under regenerative tourism principles, delivering net positive benefits to people, places and nature.



Even more exclusive is Amaala, targeting the world's top 2.5 million ultra-high net worth travellers. Sited across 380 hectares on the north-western coast, the resort will feature 2,500 luxury hotel rooms, 700 residential villas and apartments, and a championship golf course when complete.

The colossal Qiddiya complex, spanning 360km² outside Riyadh, is the country's most ambitious entertainment destination. Key elements are expected to come online over the next two to three years, with plans to create more than 325,000 jobs and add £19 billion to GDP annually. The development will include a Formula 1 racing circuit, 12 theme parks, and several World Cup-ready stadiums, with the Prince Mohammed bin Salman Stadium serving as its centrepiece.



The Kingdom's football ambitions received ultimate validation when FIFA announced Saudi Arabia as host of the 2034 FIFA World Cup.



Cultural heritage meets modern innovation

Saudi Arabia is home to six UNESCO World Heritage sites and more than 4,000 registered archaeological sites. Al Ula, featuring Mada'in Saleh – the second largest Nabatean heritage site after Jordan's Petra – exemplifies the Kingdom's approach to cultural tourism. The ancient city is being transformed to attract eco-friendly tourists interested in outdoor pursuits and cultural experiences.

Similarly, Diriyah, the iconic mud-brick city on Riyadh's outskirts and capital of the first Saudi state, will feature eight museums and galleries when development is complete, complementing more than 100 cafes and restaurants, 20 luxury hotels, a golf course, and a racetrack.

Religious tourism remains significant, with the Government aiming to increase Hajj and Umrah capacity from around 10 million per year in 2019 to over 30 million by 2030. However, the transformation extends far beyond religious visits. Non-religious travel now accounts for the majority of international visits, with leisure tourism accounting for 24% of visits and visits to friends and relatives another 22%⁷.

Infrastructure and private sector partnerships

To accommodate its unprecedented growth, Saudi Arabia is rapidly expanding its infrastructure. The Kingdom now boasts over 426,000 licensed hotel rooms, with international hospitality chains increasing their market presence from 47% to 65%⁸. Major brands like Hilton aim to quadruple their presence to 100 hotels by 2030.

Private sector investment has surged, reaching £3 billion in 2024, with 40% coming from foreign investors. The Tourism Investment Enabler Programme, launched in March 2024, streamlines the licensing process for tourism-related businesses to just five days, while the Tourism Development Fund has provided over £1.6 billion in support⁹.

As its ambitious plans reach full implementation, Saudi Arabia is creating unprecedented opportunities for investors, entrepreneurs, and talent across entertainment, sports, tourism and culture. The Kingdom's commitment to establishing itself as a global hub shows this transformation extends far beyond domestic economic diversification to fundamental repositioning on the world stage. ■

¹ <https://wtfc.org/news/global-travel-and-tourism-to-reach-new-heights-in-2025>

² <https://economymiddleeast.com/news/saudi-arabia-ranks-first-in-global-tourism-receipts-growth-for-q1-2025>

³ <https://economymiddleeast.com/news/saudi-arabia-ranks-first-in-global-tourism-receipts-growth-for-q1-2025>

⁴ <https://www.playthegame.org/news/the-public-investment-fund-s-growing-sports-portfolio/>

⁵ <https://www.pif.gov.sa/en/news-and-insights/press-releases/2024/pif-and-wta-sign-multi-year-partnership-to-accelerate-the-growth-of-womens-tennis-globally>

⁶ <https://economymiddleeast.com/news/saudi-arabia-gaming-market-revenue-reach-1-64-billion-2028-report>

⁷ <https://fastcompany.com/news/saudi-arabias-tourism-sector-soars-with-30-million-visitors-and-131-9-billion-contribution-to-gdp/>

⁸ <https://fastcompany.com/news/saudi-arabias-tourism-sector-soars-with-30-million-visitors-and-131-9-billion-contribution-to-gdp/>

⁹ <https://www.trade.gov/market-intelligence/saudi-arabia-tourism-industry-expansion-hospitality-sector-white-paper>

RANGE ROVER



City making through iconic infrastructure: Populous' visionary role in building Saudi Arabia's sports future

Shireen Hamdan, Senior Principal and MD of Populous KSA



Shireen Hamdan

In alignment with Saudi Vision 2030, the Kingdom is undergoing a remarkable transformation of its sporting infrastructure. At the heart of this metamorphosis is Populous, the globally acclaimed architecture and design practice that is redefining how sports facilities – at both elite and grass-roots level – serve society.

Under the leadership of Shireen Hamdan, the firm's Senior Principal and General Manager of Populous KSA, the company is spearheading visionary projects that intertwine sports, entertainment, and community building into vibrant urban experiences.

Hamdan's influence is profound. As the first woman to join the firm's global board of directors, she is reshaping not just skylines but paradigms. Fluent in Arabic and deeply connected to the region's evolving needs, she oversees key developments such as Aramco Stadium, King Salman International Stadium, and the Prince Mohammed bin Salman Stadium, each positioned to support Saudi Arabia's hosting of the 2034 FIFA World Cup.

In an era where cities face unprecedented challenges from overpopulation and climate change to shifting

societal expectations, Hamdan advocates for a new approach: one that uses smart design to deliver people-first urban transformation. In a recent interview with Fast Company Middle East, she articulated a vision for holistic planning that integrates key amenities, promotes walkability, and aligns transportation infrastructure with human needs.

"This approach also demands more from buildings themselves," she explains, "requiring architects and designers to push beyond the traditional conventions of typology to maximise space by ensuring flexibility for different uses and events."

Take the evolution of stadiums, for example. Once built on city fringes and largely dormant outside matchdays, these venues are now being reimagined as integral components of the urban fabric – vibrant spaces that enrich local life and stimulate economic development.

Redefining the urban landscape through design

Among Populous' standout projects, the Aramco Stadium in Al Khobar is a beacon of innovation and environmental sensitivity. Perched along the Gulf, its fluid design features airborne sails and an organically

ventilated seating bowl, which echoes the movement of waves and desert spirals. Designed to LEED Gold standards and accommodating 47,000 spectators, the stadium is more than a sports venue. It anchors a masterplan spanning 800,000m², incorporating retail districts, entertainment zones, an e-gaming hub, and athlete training facilities. “The venue’s stunning setting,” says Hamdan, “will become iconic in the football world and will be synonymous with Saudi Arabia’s vision to further develop Al Khobar into a global sports destination.”

In Riyadh, the King Salman Stadium embodies monumental scale and poetic form. With capacity for more than 92,000 fans, its architecture draws inspiration from natural growth patterns, establishing a living connection with its surrounding green corridors. Within this broader masterplan, Populous has orchestrated a landscape that includes athletics facilities, aquatics centres, public parks, and a 9km sports track that sets a new benchmark for stadium-led placemaking. “The King Salman Stadium and Masterplan,” Hamdan notes, “harmoniously blend the realm of sports with the beauty of nature.”

At Qiddiya, a city built to celebrate culture and creativity, Populous has designed the Prince Mohammed bin Salman Stadium as a futuristic structure embedded in the cliffs. Its modular digital façades and immersive portals represent a new typology in entertainment architecture. A covered mixed-reality street connects the stadium to hospitality towers and social venues, reinforcing its role as a cultural nexus. “We have been able to draw on all our experience,” Hamdan reflects, “to create this iconic multi-use stadium.”

Adjacent to this project is the Qiddiya Esports Arena, which stands as a symbol of the Kingdom’s ambitions to lead in digital and interactive



Credit @Populous: Render Image of King Salman Stadium, Riyadh

entertainment. With 4D haptics, kinetic lighting, and sensory-driven seating, the venue is as immersive as it is inclusive.

“Increasingly we are seeing the development of Arenas as a key part of wider mixed-use districts”, says Hamdan. “We are able to bring our experience from projects like The Sphere in Las Vegas, or the music-specific Co-op Live Arena in Manchester, to create incredible arena experiences across the region. The Qiddiya City Esport Arena will be a complete representation of Qiddiya’s ‘Play Life’ ethos.”

An urban philosophy grounded in purpose

What sets Populous apart is its commitment to city making – a term that transcends mere construction to encompass long-term community transformation. Rather than applying formulaic solutions, Hamdan insists on a bespoke methodology. “There’s no universal formula; every project is different and requires a customised approach,” she affirms. “The right mix of design strategies, materials, technology, and construction methods depends on various factors, including location, climate, building orientation, and, most importantly, how the space will be used.”

This philosophy has given rise to projects that are not only sustainable and technologically advanced but also socially resonant. Their stadiums are embedded in dynamic, mixed-use districts that pulse with activity throughout the year. Public parks, walkable streetscapes, and multi-modal transport systems converge to support healthy, inclusive, and adaptive communities.

Hamdan sees such strategic planning as the cornerstone of the smart cities of tomorrow. “Making this a reality takes strategic planning and foresight,” she explains, “but it’s entirely possible and will lead to healthier, more liveable cities for everyone.”

Opportunities for global collaboration

Populous’ ambitious undertakings in Saudi Arabia represent not only architectural milestones but also major opportunities for international partnership. UK firms, in particular, are well-positioned to contribute



Credit @Populous: Build in progress for Prince Mohammed bin Salman Stadium, Qiddiya, KSA

expertise in engineering, digital infrastructure, and sustainable urban planning. With the 2034 FIFA World Cup on the horizon, these projects become a platform for global innovation and cooperation.

In reshaping Saudi Arabia’s cities, Populous and Shireen Hamdan are offering the world a new vision of how infrastructure can serve people, culture, and the planet. Their work exemplifies the very best of 21st-century design thinking – intelligent, inclusive, and profoundly human. As the Kingdom prepares to welcome the world in 2034, it does so with design that is not only iconic but also catalytic architecture that makes cities, and changes lives. ■

GRIMSHAW

BEAUTY THROUGH INGENUITY

Infrastructure isn't just essential to a thriving future; it's the foundation of it. Buildings are shaped by evolving lifestyles and need to be inherently healthy and sustainable.

As an international architecture practice, Grimshaw is at the intersection of this evolution. We recognise the responsibility we have, through design, to advance environmental and social change and challenge preconceived ways of living.

We are a place of ideas and innovation, solving complexity through collaboration and bringing beauty through ingenuity.



grimshaw.global

Elizabeth line: line-wide design, London, UK

A thriving future through intelligent design

Keith Brewis, International Managing Partner, Grimshaw



Keith Brewis

How Grimshaw is delivering infrastructure and places that embody Saudi Arabia's sustainable, prosperous transformation.

As Saudi Arabia rolls out its ambitious Vision 2030, international architecture practice Grimshaw is a committed partner in the Kingdom's future.

Since its establishment in 1980, Grimshaw has become a global leader in transport infrastructure and progressive city design, winning over 250 awards (including the Mies van der Rohe and the RIBA Stirling Prize) across its eight international studios. Its projects are recognised for the genuine difference they bring to communities and economies. From the groundbreaking Terra – The Sustainability Pavilion at Dubai Expo 2020, to major infrastructure projects across the globe including Martin Place Metro in Sydney Australia, and the Elizabeth line in London, UK, Grimshaw's work demonstrates how intelligent design can power a nation's vision, evolution and potential.

Making a mark in the Middle East

Operating from its regional hub in Dubai, Grimshaw has built enduring partnerships and deep local knowledge that shape every project it delivers in the Middle East.

Early commissions in Qatar, including the QIC tramways and the Al Farjan community developments, demonstrated its ability to deliver ambitious projects that reflect the region's aspirations for innovation and quality of life.

Terra – The Sustainability Pavilion in Dubai cemented the practice's reputation in the region, demonstrating how smart design can tackle extreme heat through passive cooling and intelligent systems, rather than energy intensive solutions. The soon-to-open Oman Botanic Garden, takes a similar approach, celebrating the region's unique flora and landscapes while creating spaces for education, conservation and tourism. Together these projects embody Grimshaw's capacity to unite global expertise with local understanding, delivering architecture that is visionary and grounded in place.

"Major projects bring with them complexity – technical, physical, economic, cultural and environmentally. We draw together these layers by building deep relationships with stakeholders and clients – understanding motivations, vision and business outcomes – alongside the context of place, its climate and its communities," explains Keith Brewis, Grimshaw's International Managing Partner.

A responsible partner in complex design

When Brewis speaks about Saudi Arabia he highlights the Kingdom's remarkable clarity of vision. "There's something powerful happening here; a culture that honours its deep history while embracing fresh ideas and genuine ambition.

The Saudi people, are engaged and aspirational, drawn to big city thinking and innovation but still closely connected to the nation's stunning landscapes and heritage. Rather than pulling in opposite directions, these forces are driving the Kingdom's shift from an oil based economy to something more dynamic and sustainable," he says.

Grimshaw is already involved in several Vision 2030 projects focused on sustainable prosperity: economic, social and environmental. They range from research and innovation hubs, to advanced transport and energy infrastructure for new mixed-use communities, to destinations that showcase Saudi Arabia's incredible biodiversity and geology. The practice's expertise is at the intersection of strategic regenerative masterplans and the design of complex infrastructure and buildings.

Designing for desert heat

Creating successful projects in the Middle East's extreme climates requires architectural solutions that work with the environment, not against it. Grimshaw's approach integrates biomimicry, building science, and regenerative design to create buildings that essentially cool themselves. Solar arrays generate renewable power, every drop of water is carefully managed, and the native landscaping thrives in arid conditions.



Terra - The Sustainability Pavilion, Expo2020 Dubai, UAE ©Desert Ink

By allowing climate and physics to shape the design from the ground up, Grimshaw delivers architecture that's both beautiful and functional, experimental yet practical. Its work pushes the boundaries of sustainable design while staying true to what makes each location special.

"We centre everything with a deep respect – for place, people, planet and perspective. Our international knowledge is vital, but only through understanding national aspirations and local context, can we truly unlock design that transforms," explains Brewis.

Rooted and networked for innovation

Grimshaw's presence in the Middle East is not transient. It is rooted in collaboration and knowledge exchange, building trust

and staying open to culture and values. Alongside its Dubai studio, the practice has now established a growing presence in Saudi Arabia and Oman: local teams investing in long-term relationships.

“We want to be a part of every region in which we work. While our projects often provide our entry point into new markets, our people and partnerships are the true measure of our commitment.

Concerted collaboration is at the heart of this ethos. Working with urban thinkers, economists, researchers, engineers and fellow designers and city makers, Grimshaw has been invited early into the evolution of projects to propose strategic design solutions that not only advance cultural richness and economic advancement but have discernible value. Through this collective ingenuity comes beauty, creating places that spark joy and have real impact,” says Brewis.

Forging new, adaptable design thinking

Beyond its sustainability ethos, Grimshaw sets itself apart with a design philosophy that seeks to create strong masterplans and deliver building and infrastructure frameworks that can evolve as needs change over time. This naturally leads to designs that endure, serving today’s needs and anticipating tomorrow’s possibilities.

As Brewis explains: “We shy away from architecture as a fixed monument, instead we believe in architecture that lives and adapts. Inherent in this approach is a focus on longevity and legacy: design with purpose and lasting impact and relevance.”



Oman Botanic Garden, Muscat ©Philip Handforth

As Saudi Arabia’s visionary projects reshape what’s possible, not just in the Kingdom but on the international stage, Grimshaw is playing a leading role – delivering major infrastructure projects and places that inspire the next generation

“We see the aspiration of the Kingdom as a potential and a responsibility to design places that are beautifully experimental, exploratory and environmentally enhancing, destination making and preserving,” says Brewis. ■

Transport & Logistics: Driving Saudi Arabia forward

Saudi Arabia's location at the meeting point of Asia, Africa and Europe gives it a significant advantage in global trade networks. This strategic positioning has allowed the Kingdom to steadily climb the World Bank's global logistics performance index, rising from 55th in 2018 to 38th in the latest rankings. Yet, the ambition doesn't stop there: Saudi Arabia has its sights set on entering the world's top 10 within the next few years¹.

Transport and logistics have been identified as central pillars for economic diversification, with the country aspiring to increase the value of its logistics market to £12.2 billion by 2030². Achieving these goals will require continued investment to upgrade infrastructure, expand capacity across ports and airports, develop new transportation corridors, and generate more job opportunities for the nation's workforce.

Sector structure

The Ministry of Transport and Logistics Services (MTLS) is the backbone of the sector. It oversees the delivery, design and maintenance of transport services spanning land, sea and air. Public transport is overseen by the Saudi Public Transport Company (SPTCO), which is responsible for a fleet of more than 2,000 buses³.

Air travel is facilitated by a broad airport network comprising 13 international airports. The country's four principal airports – King Khalid International in Riyadh, King Fahd International in Dhahran, King Abdulaziz International in Jeddah, and Prince Muhammad bin Abdulaziz Airport in Madinah – handle the bulk of air passenger traffic. There are also around 15 smaller, regional or local airports in the country⁴. On the maritime front, the Saudi Ports Authority is responsible for managing over 21 state-of-the-art harbours that play a crucial role in supporting industrial activity and global trade links.

The National Transport and Logistics Strategy (NTLS) was launched in 2021 with a budget of £106 billion, marking a decisive move to develop the freight network and logistics infrastructure. Building on this, the Global Supply Chain Resilience Initiative (GSCRI) was introduced the following year to draw both domestic and foreign investment into supply chain development by offering a range of attractive incentives.

Cultivating a skilled and adaptable workforce is instrumental to these ambitions. Responding to this need, the Saudi Logistics Academy was established in 2021 in cooperation with the private sector, ensuring new talent is equipped through a range of specialised logistics training programmes.

A vital feature of Saudi Arabia's logistics overhaul is the creation of dedicated logistics zones dispersed throughout the Kingdom. The Government plans to increase the number of these zones from 22 to 59 by 2030. Encompassing more than 1km² and supported by over £2 billion in investment, these logistics hubs aim to improve supply chain efficiency and attract investment on both a local and global scale.

Ports' potential

Saudi Arabia's ports play a pivotal role in global shipping, with approximately 12% of worldwide container traffic passing through the Kingdom annually. Major trade routes between Asia and the Mediterranean, Europe and North America enter the Suez Canal and pass by key Red Sea ports such as Jeddah Islamic Port (JIP) and King Abdullah Port (KAP).

Further north on the Red Sea coastline, the port of NEOM is set to become a transformative force in regional logistics. Integrated into the visionary NEOM smart city project, which is expected to be completed by 2039, the new port will stand out for its commitment to technology and sustainability. Designed to operate entirely on

renewable energy, the port will provide around 2km² of advanced logistics space, establishing fast, efficient transport links to both domestic and international markets.

The Government's focus on maritime infrastructure is evident in the expansion projects underway at key facilities including King Abdulaziz Port on the Gulf and Jeddah Islamic Port, which will see enhanced cargo capacities and the development of massive logistics parks, such as the 1km² integrated park at King Abdulaziz Port.

Flying high

The country's ambition to build a world-class logistics sector is complemented by the modernisation of its aviation industry. The General Authority for Civil Aviation (GACA) announced plans in 2024 to secure £79 billion in investments and to boost annual passenger numbers to 330 million by 2030⁵.

By far, the country's largest aviation project is the £5.7 billion construction of King Salman International Airport outside Riyadh, which will be one of the largest in the world when complete. Covering 57km² and with six parallel runways, the airport will handle up to 100 million passengers per year by 2030 and 185 million passengers per year by 2050, as well as 3.5 million tonnes of cargo by 2050⁶.

Another major addition to Saudi Arabia's aviation sector will be the launch of Riyadh Air, a new national airline scheduled to begin operations in Autumn 2025. Together with the established carrier Saudia, Riyadh Air will expand connectivity to over 100 international destinations by 2030⁷. This new entrant is projected to generate more than 200,000 jobs and add £15.9 billion to the national economy⁸.

International cooperation

Saudi Arabia's rapid transformation has fostered strong international partnerships. The UK, for example, signed a series of collaborative agreements between 2018 and 2025 to assist the Kingdom in enhancing its aviation safety regulations and security framework, reflecting the close bilateral relationship and shared commitment to transport sector advancement.

Through these wide-ranging initiatives, the country is facilitating growth not only within transport and logistics, but also in related sectors such as business and tourism. This integrated strategy creates an array of opportunities for international partners, including UK infrastructure specialists, consultancy firms and training providers, who are well positioned to benefit from the Kingdom's drive to become a major global logistics powerhouse. ■

¹ <https://lpi.worldbank.org/international/global>

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Future-proofing the vision: Why early security matters

Richard J. Ellis, Managing Director, ATG Access



Richard J. Ellis

Vision 2030 represents more than just ambition. As projects across the Kingdom move from blueprint to reality, a new national landscape is taking shape. One that reflects Saudi Arabia's confidence, creativity, and intent to lead across tourism, culture, and technology.

From coastal resorts and smart cities to sacred spaces and revitalised heritage sites, this new infrastructure is not just changing how people live, but how the world experiences Saudi Arabia. Now, as the focus turns to long-term impact, it's important that the security infrastructure matches the calibre of the spaces it protects, not only functionally, but aesthetically and culturally too.

Security as a seamless part of the vision

In too many developments around the world, physical security is still too often brought in late, treated as a technical bolt-on rather than a strategic design priority. The consequences of that can result in rushed decisions, increased costs, and missed opportunities to integrate protection in a way that enhances the public realm.

Saudi Arabia has the opportunity to lead by doing things differently. That means integrating security from the outset. Increasingly, we see forward-thinking planners, architects, and developers working with

security specialists from the very beginning, not only to meet international standards, but to ensure solutions are integrated, respectful, and relevant to each project's unique character.

Because when security is embedded from the beginning, that's where real value lies. It becomes a seamless part of the vision, a quiet enabler of safety, efficiency, and public confidence.

Security that belongs

Every project in the Kingdom carries its own identity. A plaza beside a new mosque will have very different requirements than a desert resort or a waterfront promenade. But one thing that should be consistent is ensuring the security fits its context, technically, visually, and culturally.

That level of integration only happens when the right expertise is involved early. Engaging credible, experienced security partners from the concept stage ensures that solutions are not only meeting security standards but also working in harmony with the environment. These environments are often symbolically important and visually ambitious, and they deserve protection that supports, not detracts from, their intent.

When security is left too late, options become limited. Civil engineering, groundworks, and structural constraints may affect the outcome. Opportunities for creative, efficient design are lost. And the risk increases not just to timelines and budgets, but to public safety and the overall user experience.

More than meets the eye

There's far more to modern physical security than people realise. Hostile vehicle mitigation systems, for example, no longer need to look like barriers. They can be crafted to blend in seamlessly into the landscape, doubling as seating, lighting, planters or even decorative elements, using traditional patterns, local materials, or culturally relevant design.

This matters for both aesthetics and identity. Security should support the purpose and experience of the space it protects. When thoughtfully integrated, it builds reassurance and not fear. And when done right, it becomes 'invisible' in all the right ways, offering peace of mind without creating visual or physical disruption.

That kind of result doesn't come from off-the-shelf products. It requires a tailored approach and a partner who understands the vision, as well as the threat. A partner who can work alongside designers and engineers to deliver solutions that are as intelligent as they are secure.

A stamp of confidence

Saudi Arabia has a rare opportunity to deliver world-class destinations and shape how they are secured. Security doesn't have to be loud to be effective. And it certainly doesn't need to be an afterthought. It can be a mark of confidence. An extension of the design language. A subtle but powerful message to residents and visitors alike that these places are not only extraordinary but also safe and cared for.

For many international visitors, these projects will be their first encounter with Saudi Arabia. The way a space feels, whether it invites trust, comfort, and openness, will shape their experience. Good security enables that. Done right, it supports flow, creates reassurance, and protects without intimidating.

It becomes part of the atmosphere, not a disruption to it, and that's the ultimate sign of a job well done.

Decisions matter

The momentum behind Vision 2030 is undeniable. Many high-profile projects are already delivered or nearing completion. But there's still time to apply key lessons and embed best practice into the next phase of development.

The lesson is simple: the earlier security is considered, the more value it delivers. From avoiding last-minute redesigns to reducing delivery risk, early engagement with trusted, certified suppliers leads to more cohesive, cost-effective outcomes and better long-term performance.

Security planning supports regulatory compliance, while also enabling operational success and safeguarding the integrity of a space for years to come.

Protecting what matters

The spaces emerging across the Kingdom today are some of the most exciting and meaningful anywhere in the world. They are destinations of movement, faith, connection, and pride. And they deserve a level of protection that reflects their significance.

Security should never be seen as separate from the vision. It is part of it, and when approached with the same ambition and intelligence, it strengthens everything around it. ■

Energy: A powerhouse in transformation

Saudi Arabia's energy sector has been the cornerstone of its economy for almost a century, the catalyst for unprecedented development and wealth creation. It holds the world's second-largest oil reserves and has long been a leading petroleum exporter. Yet amid the winds of change that are buffeting the global energy sector, the Kingdom is also pioneering one of the most comprehensive renewable energy transitions.

The Ministry of Energy's spending on power and renewable energy projects is expected to reach £229 billion by 2030, underlining the Kingdom's commitment to energy diversification under Vision 2030¹.

Increasing demand for electricity has led to the country increasing its power capacity, and the power generation market is expected to grow to 110GW by 2028², up from 83GW in 2023 – a 5% compound annual growth rate over five years³.

Regulatory framework and market structure

The Saudi energy sector operates under a well-structured regulatory framework. The Ministry of Energy is the primary governance body, overseeing electricity, gas, petroleum and renewable energy matters. Saudi Electricity Company maintains a monopoly on electricity production, transmission and distribution, while the Saudi Power Procurement Company is the exclusive buyer of electricity and capacity from generators.

The National Renewable Energy Programme operates under the Ministry of Energy's mandate, focusing on maximising renewable energy potential and working towards the full privatisation of electricity

generation by the end of 2025. This initiative is expected to present significant opportunities for private companies to meet sustainability targets and replace outdated power plants.

Oil and gas: Maintaining global leadership

Even with its ambitious diversification plans, Saudi Arabia's hydrocarbon sector continues to show considerable strength. Saudi Aramco, the state-owned oil giant headquartered in Dhahran, remains a dominant force in global energy markets. In 2024, Aramco reported net income of £83.1 billion, though even this huge sum was a decline from £94.9 billion in 2023, primarily due to lower oil prices and reduced sales volumes⁴.

The company maintains its position as the world's largest crude oil producer, with production of around 11.5 million barrels per day in 2023. Aramco's strategic investments continue unabated, with capital expenditures of £41.7 billion in 2024 and guidance for 2025 capital investment between £40.7 billion and £45.4 billion⁵.

The Kingdom's most significant upstream development is the Jafurah Oil and Gas Field, recognised as the largest liquid-rich shale gas play in the region. Aramco anticipates potential additional operating cash flows of £7 billion to £7.8 billion from growth in its upstream gas business by 2030, highlighting the continued importance of natural gas in the energy transition strategy.

Renewable energy: Racing towards 2030

Saudi Arabia's energy strategy reflects a careful balance between maintaining its hydrocarbon leadership and building a sustainable

energy future. The Kingdom aims to achieve an optimal energy mix for electricity production by having gas and renewable energy at approximately 50% each by 2030, and expanding capacity to 130GW⁶. This target represents 58.7GW from solar and 40GW from wind, making it the most ambitious goal among GCC countries⁷. When achieved, this will displace approximately one million barrels of liquid fuel currently used for power generation.

Its commitment to achieving net-zero emissions by 2060 demonstrates the ambitious scope of the transformation. The country is on track to achieve its goal to reduce carbon emissions by 278 million tonnes per annum by 2030, with the electricity sector expected to contribute approximately 55% of this emissions reduction⁸.

Recent momentum has been encouraging. Since 2022, an additional 2,100MW of renewable energy has been connected to the grid, bringing the total capacity of installed renewable energy to around 2,800MW⁹.

The progressive regulatory framework adopted by the Kingdom offers an attractive environment for foreign investors. With sustainability targets to hit, and electricity generation to be fully privatised¹⁰, there are ample opportunities for investors in the production, distribution and transmission of renewable energy.

Green hydrogen revolution

The country's most ambitious clean energy project is the NEOM Green Hydrogen plant, currently under construction at the NEOM smart city in the northwest region. This £6.6 billion project is the world's largest green hydrogen facility, designed to produce up to 600 tonnes per day of carbon-free hydrogen in the form of green ammonia. The plant will operate entirely on renewable energy, utilising 4GW solar and wind power generation sites and covering over 300km² of land.



Construction was 80% complete at the start of 2025 across all sites, with the first green hydrogen expected to be available in 2027¹¹.

Critical success factors

Despite significant investments and government commitment, like most other countries charting a clean energy future, Saudi Arabia is facing considerable challenges in its energy transition. It must rapidly increase the pace of renewable energy deployment to meet its targets, while the integration of renewable sources into the existing grid infrastructure requires substantial upgrades and investment in energy storage solutions.

This presents substantial opportunities for international investors, particularly UK companies. The Government has allocated significant resources to achieving its renewable energy targets, with over 80

public and private sector initiatives representing an investment of over £147 billion supporting the green transition.

Companies can access tender opportunities through the Ministry of Energy's website, with project tenders posted online by the Saudi Power Procurement Company. While appointing a local Saudi agent is not mandatory, partnerships with Saudi entities are strongly recommended for navigating regulations and identifying business opportunities.

The In-Kingdom Total Value Add programme encourages local participation, technology transfer, and the growth of small and medium-sized enterprises, creating additional opportunities for foreign investors willing to establish local partnerships.

The success of the energy transformation will depend on comprehensive regulatory reforms, streamlined permitting processes and continued international partnerships. The memorandum of understanding with the UK signed in 2024 demonstrates the

Kingdom's commitment to international collaboration in clean energy research and development.

Pivotal transformation

Saudi Arabia's energy sector stands at a historic crossroads. While maintaining its position as a global oil and gas leader, the Kingdom is simultaneously building one of the world's most ambitious renewable energy programmes. With substantial government backing, progressive regulatory frameworks and significant investment opportunities, the sector presents compelling prospects for international partners.

The successful implementation of Vision 2030's energy objectives will not only reshape its economy, but also position the Kingdom as a leader in the global clean energy transition. For UK companies and international investors, the opportunity to participate in this transformation is one of the most significant energy market developments of the decade. ■

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DEFENDER

EMBRACE THE IMPOSSIBLE



Healthcare & Pharmaceuticals: Targeting new possibilities

Saudi Arabia is undergoing a remarkable transformation in its healthcare and pharmaceutical sectors, driven by the ambitious Vision 2030 programme that positions these industries at the heart of the Kingdom's economic diversification.

The Government committed £45.6 billion to health and social development in 2024¹, the second largest budget allocation after education. As one of the six members of the Gulf Cooperation Council (GCC), the Kingdom accounts for 60% of total healthcare expenditure in the group² and dominates the regional pharmaceutical landscape, with nearly 60% of all pharmaceutical purchases within the GCC³.

Saudi Arabia provides free universal healthcare coverage to its entire population through the Ministry of Health, including citizens and permanent residents. The system operates across three levels: primary healthcare centres delivering basic preventative and curative services; secondary care through hospitals providing emergency procedures and diagnostics; and tertiary care via specialist centres offering advanced treatments and transplant services.

The Kingdom's healthcare system ranks 32nd globally in the World Index of Healthcare Innovation for 2024⁴, demonstrating significant progress in modernising infrastructure and expanding services. The Ministry of Health delivers more than 60% of healthcare services with annual spending of approximately 4.6% of GDP⁵, while the private sector accounts for less than 25% of total expenditure – a proportion the Government aims to substantially increase through Vision 2030.

Digital health revolution

Saudi Arabia has allocated £1.2 billion for health information technology⁶, establishing the Middle East's first virtual hospital, Seha, which provides telehealth consultations to over 400,000 patients annually⁷. Vision 2030 targets digitising 70% of patient activities by the decade's end⁸, leveraging widespread smartphone adoption to drive digital healthcare transformation and streamline administrative processes.

The digital health strategy aims to streamline administration and processing, freeing healthcare professionals to focus on direct patient care, while improving accessibility. Electronic health records, telemedicine platforms, and AI-driven healthcare solutions are integral components of this modernisation.

Public-private engagement

The Health Holding Company has identified nine key areas suitable for public-private partnerships: home care, hospitals, laboratories, long-term care, medical cities, pharmacies, primary care, radiology and rehabilitation. The Ministry of Health plans to privatise 290 hospitals and 2,300 health institutions⁹, with more than 100 healthcare PPPs anticipated over the coming years, backed by £10 billion in private investment¹⁰.

Vision 2030 targets increasing private healthcare expenditure from 25% to 35% of total spending. International investors can establish wholly-owned entities for most healthcare activities, though

professional consultation services typically require a minimum 25% Saudi partnership. Healthcare is among several sectors where 100% FDI is now permitted.

Dynamic pharmaceutical market

The country's pharmaceutical sector is equally buoyant with potential for investors. The market reached £8.1 billion in 2024 and is projected to grow to approximately £12.8 billion by 2032-2034¹¹. This growth is driven by an expanding population, increasing chronic disease prevalence, rising healthcare awareness, and growing health insurance coverage.

The Saudi Food and Drug Authority (SFDA) oversees pharmaceutical safety and pricing, following Good Manufacturing Practice guidelines established by the US FDA. Pharmaceutical registration with the Ministry of Health can take up to 18 months, though approval times are reportedly decreasing. The SFDA has restructured to align with the National Biotechnology Strategy, creating specialised departments across key sectors.

Drug registration requires previous marketing in two 'developed' markets before Saudi approval, effectively favouring established companies and ensuring safety standards. Government pricing controls maintain some of the region's lowest drug prices, balancing affordability with market sustainability.

Currently over 80% of its pharmaceuticals are imported¹², with many overseas companies marketing foreign-made products under different brand names. Branded drugs dominate with strong consumer loyalty, while the move towards privatisation increases demand across therapeutic areas including antibiotics, cardiovascular treatments, cancer therapies and diabetes medications.



Local manufacturing currently covers 29% of the Kingdom's pharmaceutical needs through approximately 50 registered facilities. Vision 2030 aims to produce 40% of all drugs domestically, supported by government incentives including free property leases, interest-free loans, and subsidies for both multinational and domestic companies.

The National Industrial Development Centre (NIDC) actively partners with local and regional manufacturers to strengthen production capabilities, with national security considerations providing additional impetus for domestic manufacturing development.

In October 2023, the first oncology pharmaceutical facility was inaugurated in Sudair City, marking a significant milestone in the pharmaceutical and food industries, demonstrating tangible progress towards manufacturing goals.

Biotech strengths

In January 2024, Crown Prince Mohammed bin Salman launched the National Biotechnology Strategy, targeting regional biotechnology leadership by 2030 and global hub status by 2040. The strategy aims to contribute 3% of non-oil GDP by 2040 and create 11,000 jobs by 2030.

The strategy focuses on four pillars: vaccine development and manufacturing for regional self-sufficiency; biomanufacturing and localisation to establish comprehensive domestic production; genomics research leveraging the Kingdom's unique genetic diversity; and plant optimisation for food security.

Biopharmaceuticals, including biologics and biosimilars, are also creating substantial market changes through technological advances, enabling personalised treatments. The oncology segment projects

particular growth, with oncology drugs expected to capture the largest market share at £840 million in 2025¹³.

Investment climate

Strong IPO activity in recent years demonstrates robust investor appetite, supported by Vision 2030 reforms facilitating SME access to capital markets. International companies including GlaxoSmithKline, Merck, and Pfizer maintain a significant presence through partnerships or direct investment, while recent collaborations such as the Vertex Pharmaceuticals agreement for gene therapy manufacturing indicate continued international confidence.

The convergence of healthcare infrastructure development, pharmaceutical market expansion and biotechnology innovation creates a unique ecosystem supporting Saudi Arabia's transformation into a knowledge-based economy. With substantial government investment, regulatory improvements and a strategic focus on self-sufficiency, the healthcare and pharmaceutical sectors are key pillars of the Kingdom's economic diversification strategy, promising improved health outcomes and strengthening regional and global competitiveness. ■

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⁷ <https://www.moh.gov.sa/en/Ministry/Projects/Documents/Seha-Virtual-Hospital.pdf>

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Empowering vocational excellence: A global perspective

Alan Woods OBE, Chief Executive, VTCT Skills



Alan Woods OBE

Alan Woods OBE, Chief Executive of VTCT Skills, shares his reflections on how international awarding organisations can play a meaningful role in supporting Saudi Arabia's Vision 2030. As the Kingdom embarks on a bold journey of economic transformation, vocational education and training (TVET) must rise to meet global standards – unlocking opportunity, dignity, and prosperity for all.

Embedding skills into national progress

Vocational education is far more than a training pathway – it's a cornerstone of national development. International awarding organisations help governments weave skills development into the fabric of economic planning. By aligning qualifications with strategic priorities, they ensure that vocational education is not an afterthought, but a powerful engine for growth.

These organisations bring deep expertise in labour market analysis, future skills forecasting, and system design. Their insights help policymakers build training ecosystems that are agile, inclusive, and responsive to industry needs – creating real pathways to employment and advancement.

Why collaboration matters

When countries partner with international awarding bodies, they gain access to a wealth of global

experience. These organisations understand how to design qualifications that meet international standards while staying rooted in local realities. In the context of Vision 2030, this collaboration is vital to building a workforce that is confident, capable, and competitive on the world stage.

Working hand-in-hand with employers and sector experts, awarding bodies co-create qualifications that are future-focused and industry-led. This ensures learners are equipped not just with technical skills, but with the adaptability and resilience needed to thrive in a changing world.

More than certification – A strategic ally

International awarding organisations do much more than issue certificates. They are strategic partners in shaping national skills strategies, reforming curricula, and building quality assurance frameworks. Their work strengthens institutions, supports educators, and helps governments move from fragmented systems to cohesive, high-performing vocational ecosystems.

By fostering collaboration across ministries, regulators, and training providers, these organisations help elevate the status of vocational education – making it a respected and aspirational choice for learners of all ages.

Raising the bar in TVET

Improving vocational education requires a holistic approach. International awarding bodies introduce rigorous assessment standards, support the professional growth of educators, and promote continuous improvement through benchmarking and feedback.

They also help develop qualifications tailored to specific sectors – balancing global best practices with local labour market needs. Their global networks bring innovation, new teaching methods, and digital tools that modernise vocational systems and make them more inclusive and effective.

Partnering for tutor training and digital transformation

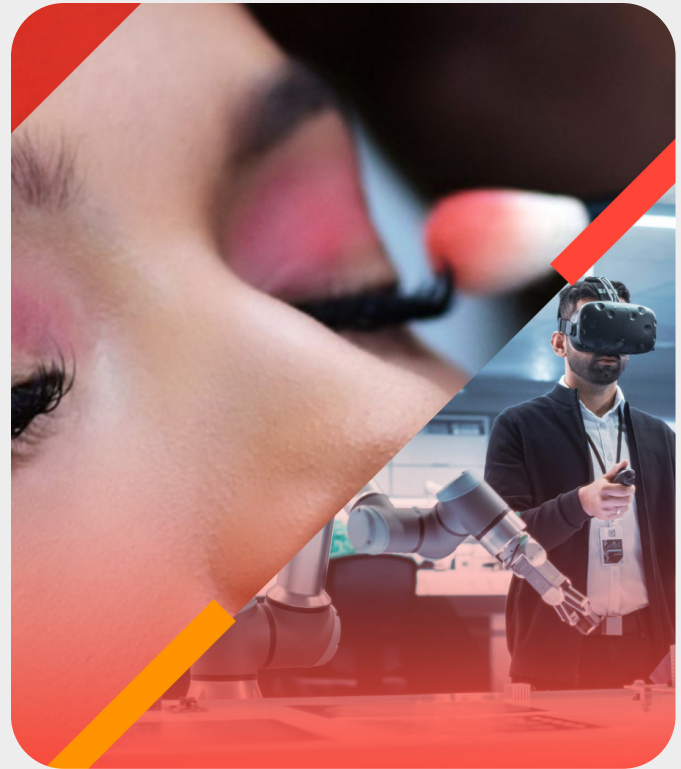
Awarding organisations work closely with government ministries to strengthen the skills and confidence of vocational educators. This includes training in modern teaching techniques, industry-relevant competencies, and assessment strategies.

Digital platforms are central to this effort – offering scalable solutions for remote learning, digital credentialing, and real-time performance tracking. These tools help ministries expand access to quality training, maintain consistency, and respond quickly to emerging needs. They also support smarter, data-driven decision-making.

Unlocking sectoral potential

Sectors such as hospitality, health and social care, beauty & wellness, sport, and early childhood education stand to benefit significantly from international collaboration. These industries are people-focused, fast-growing, and vital to national development.

But the impact goes beyond these areas. As Saudi Arabia grows its tourism, service, and knowledge economies, the need for globally recognised vocational training becomes universal. Awarding organisations bring the expertise needed to support every sector – ensuring growth is matched by a skilled, adaptable workforce.



Alan Woods OBE is the CEO of VTCT (Vocational Training Charitable Trust). A UK-registered charity and one of the oldest vocational awarding organisations, with over 60 years of heritage. We are recognised and regulated by Ofqual (England), Qualifications Wales (Wales), CCEA (Northern Ireland), and SQA (Scotland), ensuring our qualifications meet the highest standards of quality assurance and academic rigour.

Our qualifications span sectors including Hairdressing, Beauty Therapy & Wellness, Early Years, Hospitality, Health and Social Care, Logistics, Sports, and English Language. Delivered globally, VTCT qualifications are respected by universities, employers, and governments. ■

Education: Building tomorrow's knowledge-based economy

Rising educational standards, innovative curriculums and accelerated digital learning adoption are driving the transformation of Saudi Arabia's education sector. This growth is underpinned by the country's demographic advantage, with approximately 38% of its 36 million inhabitants being under 25 years of age¹.

The sector presents compelling investment prospects across all educational levels – from early years provision through K-12 education, higher learning institutions, research facilities, and specialised vocational programmes, all supported by rapid technological advancement and backed by significant government investment. In fact, research shows that Saudi Arabia ranks first among Gulf Cooperation Council (GCC) states in educational investment, with education receiving the largest budget allocation at £39.9 billion in 2025², demonstrating its commitment to developing human capital.

Comprehensive educational framework

There are three main bodies responsible for governance of the education sector: the Ministry of Education oversees K-12 provision, the Ministry of Higher Education manages universities and research activities, and the Technical and Vocational Training Corporation (TVTC) administers skills-based training programmes.

Key institutional players include the King Abdullah Public Education Development Project, which advances public education excellence and knowledge economy initiatives, alongside the National

Transformation Program (NTP), which aligns educational development with Vision 2030 strategic objectives.

The educational landscape includes both state and private institutions, with independent schools divided between international establishments and Saudi private schools. The sector's structure comprises three distinct phases:

- Elementary education (ages 6-12)
- Middle education (ages 13-16)
- Upper secondary education (ages 17-19)

The K-12 segment represents particularly attractive investment potential, supported by strong demand for international curricula.

British educational institutions maintain a substantial presence throughout the Kingdom, usually offering UK-based programmes. Market appetite remains robust as families seek out internationally recognised qualifications across all educational levels. Vision 2030's global outlook – emphasising international collaboration and cultural exchange – has intensified interest in globally recognised academic programmes, attracting both expatriate families and Saudi nationals seeking world-class education.

Investment pathways

Education and developing the knowledge economy rank among the Government's highest priorities under Vision 2030, including

enhanced private sector participation. This creates diverse market opportunities for UK enterprises across schools, universities, digital learning platforms, and professional training provision. Two of the most relevant investment avenues for UK investors are:

- **Asset partnerships** — The Government offers educational infrastructure including facilities, equipment and human resources to private sector partners for collaborative revenue generation and service enhancement.
- **Growth capital investment** - Investment licenses for Saudi Arabia's education sector saw an annual increase of 86% in the second quarter of 2024, reflecting substantial private equity flows into educational verticals, supported by government backing to accelerate sector transformation.

The Ministry of Education typically announces procurement opportunities through the Etimad platform³, through which prospective partners can review available contracts, check submission deadlines and submit proposals through digital channels.

Establishing Saudi partnerships is advisable for companies planning market entry. Although not mandatory, appointing local distributors or representatives can be invaluable when it comes to navigating the regulatory landscape and identifying relevant opportunities. It is also worth noting that any foreign companies that do invest will usually be required to employ a specified quota of Saudi nationals.

Digital learning and educational technology

The Saudi edtech market grew to £460.6 million in 2024. Looking forward, research from IMARC Group predicts the market will reach £1.36 billion by 2033, with a CAGR of 12.7% between 2025-2033⁴. This is being driven by comprehensive digital transformation across



multiple sectors, particularly benefiting from early technology adoption among younger generations.

Many Saudi schools and universities are implementing e-learning and classroom technology systems, improving educational outcomes through advanced edtech solutions. These developments create opportunities for digital learning platforms, edtech solution providers and educational content creators. Large-scale e-learning solutions that maintain student engagement are particularly sought after.

Professional and vocational training

Saudi Arabia has established several specialised vocational training initiatives, reflecting the substantial demand for professional training, particularly in the hospitality, tourism, manufacturing, engineering, business and technology sectors. Among the most high-profile are the Red Sea Global's Vocational Training Programme, AIUla Academy's



Education and developing the knowledge economy rank among the Government's highest priorities under Vision 2030.



launch as a regional hub for tourism vocational excellence, and the Riyadh School for Tourism and Hospitality. Given the international reputation of British educational institutions, curricula, and qualifications, UK vocational training providers are well-positioned to capitalise on this demand.

In hospitality specifically, the Ministry of Education and TVTC have established specialised academies, while several public universities have launched tourism programmes.

Tourism is one of the fastest growing and most dynamic areas of the economy, with the Kingdom investing more than £600 billion in the sector. As Minister of Tourism, HE Ahmed Al-Khateeb stated in March 2024, "Over the next 10 years, Saudi Arabia will be the world's top investor in this sector as we continue to unlock our country's potential."

In particular, the tourism sector is seeking to increase opportunities for vocational training to enhance business management capabilities,

develop front-line service skills, improve logistics operations, and deliver advanced English language instruction for industry-specific applications.

The current modest participation in vocational hospitality and tourism programmes – representing just 0.3% of total higher education enrolment⁵ – suggests the Government will prioritise increased vocational training participation as it continues to emphasise hospitality and tourism sector growth.

A vision realised

As Saudi Arabia accelerates towards its Vision 2030 goals, educational transformation has evolved from aspiration to reality. The Kingdom's comprehensive approach, from primary education through advanced vocational training, demonstrates its determination to build a knowledge-based economy that rewards innovation and embraces global best practices. This educational renaissance creates fertile ground for investors who can capitalise on the exciting opportunities in accessible, technology-enhanced learning solutions. ■

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Defence: Building a self-reliant defence industry

Saudi Arabia is the world's seventh-largest military spender¹, among an elite group that includes only the United States, China, Russia, Germany, India, and the UK in terms of absolute expenditure. The Kingdom's defence budget reached unprecedented levels in 2025, with £59.5 billion allocated for military spending – around 21% of total government expenditure and 7.1% of the nation's GDP². And there is more to come. The defence budget is expected to grow at a compound annual growth rate of more than 8% between 2025-2029³.

The scale of investment reflects Saudi Arabia's strategic imperative to transform from a defence importer to a self-sufficient military industrial power, with ambitious plans to achieve a localisation rate exceeding 50% of defence expenditure by 2030⁴.

HE Ahmed Al-Ohali, Governor of The General Authority for Military Industries, expressed confidence in 2025 that the Kingdom will exceed this target ahead of time, stating that the localisation rate's jump from 4% to nearly 20% was due to "a clear strategic vision, leadership support, and synergy among concerned parties, including military and security authorities as well as local and international companies"⁵.

The aggressive localisation strategy has already begun yielding tangible results, significantly boosting local capabilities and reducing reliance on imported equipment. This creates compelling opportunities for international defence companies. The requirement to establish a local presence is designed to encourage foreign companies to develop long-term partnerships with Saudi businesses, rather than focusing on standalone export arrangements.

A sector in transformation

The organisational structure supporting Saudi Arabia's defence ambitions centres on three key institutions.

The Ministry of Defence maintains operational responsibility for national security, commanding the Royal Saudi Land Forces, Royal Saudi Air Forces, Royal Saudi Naval Forces, and the Royal Saudi Strategic Missile Force. Current estimates suggest the Saudi military numbers are approximately 275,000 personnel across all services.

GAMI is the regulatory backbone of the Kingdom's military industrial transformation. Established in 2017, GAMI is the gateway for international defence contractors while simultaneously driving domestic capability development.

Saudi Arabian Military Industries (SAMI) is the operational arm of its defence industrial ambitions. It operates across five distinct business divisions: SAMI Land, SAMI Aerospace, SAMI Sea, SAMI Advanced Electronics, and SAMI Defence Systems, each focused on specific capability areas essential to national defence.

Investment climate

Industry analysts predict growing demand across all segments of Saudi Arabia's defence market, driven by regional security challenges and the Kingdom's modernisation drive.

Key areas of expansion are expected to include land and air systems, naval capabilities, tactical communications, structural component manufacturing, and cybersecurity solutions⁶. The military fixed-wing aircraft sector is currently the largest single market segment, driven by planned programmes to acquire advanced technologies across all service branches.

Its approach to capability development increasingly emphasises technology transfer and local production rather than traditional procurement models. GAMI has identified 74 supply chain opportunities within the military industries sector, with 30 priority opportunities representing approximately 80% of future expenditure⁷.

The regulatory environment for international investors has been simplified to encourage foreign participation, while ensuring transparency and compliance with international standards. Companies in the defence sector may now achieve 100% foreign ownership, and the licensing process has also been overhauled.

Defence procurement operates through multiple channels, though direct negotiation is still common. While some opportunities appear on the Etimad Portal managed by the Ministry of Finance, the majority of significant contracts tend to be negotiated on a case-by-case basis.

Strategic partnerships

There have been several recent landmark agreements which demonstrate the Kingdom's growing influence in global defence markets. In May 2025, it signed a defence agreement with the US valued at £108 billion, described by the White House as “the largest military cooperation agreement in US history”⁸. This agreement covers air and space forces, missile defence, maritime security, land forces modernisation, and advanced information systems, involving over a dozen American defence contractors including Lockheed Martin, Boeing, Raytheon, and Northrop Grumman.

Beyond agreements with its traditional Western partners, the Kingdom has also diversified its supplier base through deals with emerging defence powers. SAMI and Turkish company Baykar, for example, signed agreements in 2023 to establish manufacturing capabilities for UAV systems, including the localisation of drone production. Similar partnerships have been established with other Turkish and European companies for defence electronics and naval systems.

International collaboration

Saudi Arabia's defence industrial strategy recognises that achieving technological sovereignty requires international collaboration rather than isolationist policies. The Kingdom actively seeks foreign partners to enhance its modest but growing defence portfolio, particularly in areas requiring advanced technical expertise.

Current projects illustrate this collaborative approach effectively. The Mulhim battle management system continues to benefit from international technical assistance, while the Al-Sarawat naval programme has successfully delivered five Avante 2200 class corvettes through partnership with Spain's Navantia, with an additional order of three more.

Saudi Arabia's substantial financial resources, combined with clear strategic direction and supportive regulatory framework, position it as an increasingly attractive partner for defence companies seeking growth in emerging markets. The Government's commitment to Vision 2030 ensures that defence industrial development will continue receiving priority attention and funding support through the remainder of this decade.

Success in achieving the 50% localisation target by 2030 will depend on the Kingdom's ability to attract and retain international partnerships which bring genuine technology transfer alongside investment capital. Early indicators suggest this balanced approach is yielding positive results, with localisation rates advancing steadily while maintaining operational effectiveness across all military services. ■

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Industry & Infrastructure: Advancing to the next level

The UK's long history as an industrial pioneer is underpinned by rich heritage and a relentless drive toward innovation. In 2024, industrial output reached £217 billion, maintaining the country's status in the global top ten, with over 138,000 manufacturing businesses and a workforce of almost three million people¹. UK manufacturers contribute to every major sector, from advanced automotive and aerospace to energy, health and digital technology.

Advanced materials: The engine of modern industry

At the core of the UK's manufacturing might, lies a vibrant advanced materials sector. Institutions like the Henry Royce Institute and the National Graphene Institute have fostered globally significant research, transforming first-mover breakthroughs like graphene into powerful industrial platforms. The cutting-edge focus extends well beyond graphene: British innovators are driving forward metamaterials, self-healing composites, and 2D materials, catalysing change in manufacturing, infrastructure and transport.

The advanced materials sector employs more than 630,000 people, accounts for £45 billion in economic value annually, and has attracted

upwards of £8 billion a year in innovation funding over the past four years. Nearly 2,700 companies in advanced materials operate across the UK, with the majority being SMEs located outside London and the South East, stimulating regional prosperity and highly skilled employment². Advanced materials underpin rapid progress in fields such as sustainable transport, where lightweight graphene and composite materials are critical for lower carbon vehicles and new aerospace platforms; energy systems, where next-gen batteries and components for renewables use UK-designed 2D and metamaterials to boost efficiency and durability; and infrastructure, where self-healing materials and advanced coatings are trialling in UK infrastructure projects, aiming for longer lifespans and lower environmental impact. International partnerships and exports of British-made advanced materials and technologies continue to grow, strengthening the UK's global standing and opening new opportunities from Europe to Asia.

Championing green infrastructure

The Government's Green Industries Growth Accelerator, now with over £1 billion in support, is scaling up UK manufacturing capacity in wind power, CCUS, advanced nuclear and hydrogen technologies.

This investment has triggered major private capital inflows and placed the UK at the centre of Europe's renewable supply chain revolution³.

Hydrogen is a flagship pillar, hundreds of UK companies are engaged in hydrogen and fuel cells, with new projects and market frameworks expected to see 10+ GW of low-carbon hydrogen production capacity by 2030. Competitive public funding rounds and certification schemes are cementing Britain's role as a global clean hydrogen leader⁴.

Industrial digitalisation

Progress in "Industry 4.0" is accelerating through the Made Smarter programme, offering SMEs vital support for automation, data analytics and digital manufacturing tools. Expansion of the scheme to all UK regions by 2027 will deliver direct grants, technology advice and skills development, estimated to generate thousands of new jobs and upskill over 2,700 employees in the near term. This digital push is part of a £4.5 billion commitment through 2030⁵, with targeted support for sectors delivering zero-carbon vehicles, aerospace and clean technologies.

The Catapult Network, including the High Value Manufacturing Catapult (HVMC), provides world-class facilities and expertise for industry-academic collaboration. Between 2018 and 2023, HVMC worked with nearly 22,000 firms, the majority SMEs, and supported over 9,000 research and development (R&D) projects, powering the translation of scientific research into market-ready commercial solutions. Strategic support continues with expanded government and private investment, further embedding the UK's leadership in industrial R&D⁶.



A modern industrial strategy

The Government's Modern Industrial Strategy, launched in 2025, is a comprehensive 10-year plan to transform the national economy by focusing on innovation-led growth, industrial competitiveness and sectoral resilience. It sets out an ambitious blueprint to double private investment in advanced manufacturing, harnessing the potential of six "frontier sectors", including advanced materials, space, batteries, and agri-tech. Each sector receives tailored support through industry partnerships, sector-specific policies, and bespoke investment programmes.



International partnerships and exports of British-made advanced materials and technologies continue to grow, strengthening the UK's global standing.



The strategy also seeks to increase annual public investment in R&D to £22.6 billion by 2029-2030, with over £2 billion earmarked for AI and £2.8 billion for advanced manufacturing in the coming five years. The British Business Bank's capacity for supporting innovation and start-ups will also be expanded, aiming to secure an additional £12 billion in private capital by 2030⁷.

In addition, the strategy aims to deliver substantial new funding channels and targeted support for scale-ups to incentivise international investment and put a strong emphasis on upskilling the workforce. More than £1.2 billion extra will go to skills training each year, supporting priority areas such as digital, engineering and advanced manufacturing⁸.

A cornerstone of the new strategy is the National Materials Innovation Programme, launched in 2025. The programme coordinates research, accelerates the adoption of new materials across sectors, and supports

the scaling of discoveries into industrial and commercial solutions. It is forecasted to double material-specific jobs and boost gross value added (GVA) in the UK economy by more than £4.4 billion by 2035.

Phase 1 of the programme is already underway, with an initial £50 million to accelerate collaboration, standards, training and scale-up between government, business and academia. Further strategic goals include coordinating research and commercialisation efforts nationwide; speeding up materials adoption in manufacturing, energy, and healthcare; boosting public and private R&D investment and job creation; and fostering international collaborations and skills development.

The UK's approach under the Modern Industrial Strategy brings a coherent, long-term vision for industry, linking investment, skills, sustainability and world-class research to create a more competitive and resilient economy for the coming decade. ■

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⁶ <https://www.gov.uk/government/publications/advanced-manufacturing-sector-plan>

⁷ <https://www.gov.uk/government/consultations/invest-2035-the-uks-modern-industrial-strategy/invest-2035-the-uks-modern-industrial-strategy>

⁸ <https://www.gov.uk/government/consultations/invest-2035-the-uks-modern-industrial-strategy/invest-2035-the-uks-modern-industrial-strategy>

Technology & Innovation: At the forefront of shaping the future

The UK's digital economy generates around £286 billion in annual gross value added (GVA), about 13% of the country's entire output¹. This economic might is rooted in a landscape rich with established technology leaders and agile start-ups, powering transformation across every major industry. From intelligent automation in agriculture, to high growth fintech and healthtech, and rapid advancements in immersive digital experiences, the country's dynamism is underpinned by robust investment, a strong talent pipeline and government support.

AI: The driving force

AI is at the heart of the UK's technology surge. The sector now boasts more than 5,800 AI firms, a surge of 58% since 2023, employing over 86,000 people. AI-related revenues hit £23.9 billion in 2024, and the UK received a record £2.9 billion in AI investment, cementing its position as Europe's largest market for AI innovation². AI increasingly powers solutions in finance, healthcare, cybersecurity, retail and manufacturing. Public and private initiatives are ensuring broader adoption of AI innovations, while partnerships with leading universities continue to provide a rich research and skills base.

Smarter, greener growth

The fourth industrial revolution – often called 'Industry 4.0' – is reshaping British industry. Nowhere is this clearer than in agriculture, where robotics, drones, advanced data analytics and IoT technologies drive efficiency gains, cost savings and low-carbon operations. Smart

farming methods such as autonomous weed mapping and precision fertiliser application not only boost yields and animal welfare, but also reduce environmental impact.

AgriTech pioneers lead the way in providing AI-driven robotic solutions for farms, while advances in vertical and aeroponic farming continue to expand productivity far beyond traditional techniques. These innovations also help position the UK as a net exporter of agricultural technology, supporting rural economies and food security.

British fintech remains Europe's investment leader, with London at its core and regional hubs such as Manchester, Edinburgh, Leeds and Belfast emerging strongly. In 2024, the sector attracted over £7.8 billion in new investment, despite a challenging global climate. Job growth is robust, with fintech now representing over 12,500 new roles and significant increases in demand for technical, regulatory and commercial expertise³.

Policy and regulatory reform underpin the UK's fintech ecosystem. Initiatives such as the fintech 'scalebox', a support structure for scaling firms, and the national Centre for Finance, Innovation and Technology (CFIT), headquartered in Leeds, encourage continuous growth and foster collaboration between start-ups, large enterprises and the public sector, particularly in fast-evolving sub-sectors such as digital payments, open banking, RegTech, and sustainable finance.

The year 2025 is a landmark for UK healthtech, with nearly half of all healthcare investment now channelled into AI-powered companies and digital solutions. In the first quarter, healthtech startups raised £1.35 billion, propelled by world-leading deals such as Isomorphic Labs' £470 million funding round for AI-driven drug discovery⁴. The "Golden Triangle" of London, Oxford and Cambridge remains the crucible for healthtech research and innovation, but regional clusters, such as Manchester's Science Park, demonstrate how infrastructure and local partnerships are furthering nationwide progress⁵.

The sector's focus areas include AI-driven diagnostics, predictive analytics through digital twins and multiomic data, health data infrastructure, and increasingly, solutions aimed at personalised care and home-based health monitoring. Government investments, including a £600 million boost for health data research, are accelerating this transformation and securing the UK's place at the frontier of global digital health innovation⁶.

Expanding the digital universe

The UK is recognised as European leader in immersive technology, with the sector's XR (extended reality) market projected to reach £11.5 billion by 2030, with an annual growth rate of nearly 29%. Immersive tech, including virtual, mixed and augmented reality, has moved beyond entertainment into high-value applications in education, industrial design, remote training and simulation⁷.

Businesses and institutions are rapidly adopting these technologies to improve productivity, education outcomes and worker safety. Advances in AI are further enhancing the responsiveness and



sophistication of XR platforms, while the roll-out of 5G and new generations of lightweight AR devices are making immersive tools ever more practical for daily use. The Government's ongoing funding and policy support remain crucial to growth, enabling more organisations to harness extended reality for complex industry challenges.

Building digital resilience

The UK's cybersecurity sector is indispensable in safeguarding its digital economy. With over 2,000 specialist firms generating £10.5 billion annually, and more than 58,000 professionals employed,



Programmes to improve digital skills across the workforce could boost the UK economy by a further £23 billion per year.



the sector is central to business and national security⁸. Significant government investment and a vibrant research ecosystem, bolstered by a network of academic centres of excellence, are building ever-stronger cyber defences against rapidly evolving threats.

Public and private entities collaborate to raise security standards, while initiatives such as the National Cyber Security Strategy provide a blueprint for raising resilience industry-wide. As more critical infrastructure and services go digital, the demand for innovative cybersecurity solutions is expected to intensify.

Unlocking future growth

While digital adoption and skills levels vary across regions, the UK's innovation strategies prioritise reducing disparities and ensuring

opportunity for all. Programmes to improve digital skills across the workforce could boost the UK economy by a further £23 billion per year, underscoring the importance of inclusivity in unlocking productivity gains⁹. Strategic investments in high-speed broadband and digital infrastructure, alongside policy reforms for public procurement and technology adoption, also support SMEs and start-ups nationwide.

The UK's consistently strong performance in tech and innovation reflect a unique blend of entrepreneurial spirit, collaboration and continuous investment in research, people and frontier industries. As a result, the country remains one of the world's most attractive destinations for digital talent and technology investment, and is poised to lead the next chapter of global innovation. ■

¹ <https://www.gov.uk/government/publications/defining-and-measuring-the-uk-digital-economy/defining-and-measuring-the-uk-digital-economy-phase-2-report>

² <https://www.artificialintelligence-news.com/news/uk-ai-sector-growth-hits-record-2-9b-investment/>

³ <https://kpmg.com/uk/en/media/press-releases/2025/02/uk-fintech-investment-hits-four-year-low-but-remains-european-leader.html>

⁴ <https://www.uktech.news/medtech/health-shines-for-tech-investment-20250414>

⁵ <https://nelsonadvisors.co.uk/blog/future-trends-for-uk-healthtech-investment>

⁶ <https://nelsonadvisors.co.uk/blog/future-trends-for-uk-healthtech-investment>

⁷ <https://www.grandviewresearch.com/horizon/outlook/immersive-technology-market/uk>

⁸ <https://www.gov.uk/government/publications/cyber-security-sectoral-analysis-2023/uk-cyber-security-sectoral-analysis-2023>

⁹ <https://futuredotnow.uk/lack-of-digital-skills-in-workforce-costing-uk-over-23-billion-per-year/>

Healthcare & Life Sciences: Britain's healthcare revolution

The UK's healthcare and life sciences sector continues to set a global benchmark, fuelled by government investment, a tradition of scientific leadership and dynamic industry growth. The integration of care, research, and innovation positions the country as a top destination for forward-looking medical, biotech and medtech enterprises.

The NHS: Backbone of British healthcare

At the system's heart is the National Health Service (NHS), founded more than 75 years ago. For 2025, the NHS's budget surged to over £192 billion, with further increases expected to underpin new infrastructure, digital platforms and streamlined elective care through 2026. The NHS directly employs around 1.5 million people in England alone, making it not only the UK's largest employer but a global force in population health. Every day, this network manages over a million patient contacts, driving outcomes that regularly feature among the world's best¹.

World-class research

The groundwork for much of the UK's scientific power lies in its deep university-health sector connections. Four of the world's top 10 universities for clinical and health sciences (Oxford, Cambridge, Imperial College London and University College London) and two of the top three for life sciences are in the UK² (Oxford and Cambridge). These links foster collaborative environments for both training and accelerated discovery. The Covid 19 response underscored the strength of this model, as the joint work of UK universities, NHS resources and companies such as AstraZeneca led to a globally transformative vaccine rollout.

Strategic investments continue in new frontiers, including genomics and cell and gene therapies, where the NHS is recognised as the first nationwide system to integrate whole genome sequencing into routine care. Ambitious clinical trial platforms, such as the expanding MND-SMART and AVB-101 gene therapy studies, leverage this infrastructure to bring next-generation treatments directly to UK patients³.

Innovation hubs

The UK's innovation emphasis is exemplified by the Catapult Network – nine technology and innovation centres spanning more than 65 UK sites. These hubs aim to facilitate research translation, cross-sector collaboration, SME support and talent development in sectors such as high-value manufacturing, medicines discovery, digital health, and clean energy. Government investment in the Catapult Network has reached £1.6 billion through to 2028, with a target of generating a sevenfold economic return and accelerating the move from prototype to patient benefit⁴. These centres are also driving the formation of regional innovation clusters and aligning with emerging Life Science Opportunity Zones, which blend physical laboratory facilities with academic and industry expertise to spur productivity and regional growth.

Alive with opportunities

The Government's 2025 Life Sciences Sector Plan sets out a new 10-year framework, aiming to make the UK the world's top location to develop and launch new treatments. It focuses on three pillars: driving health innovation and reforming the NHS, enabling internationally leading R&D, and creating optimal conditions for business scale-up

and investment. To achieve this, it promises streamlined clinical trial approvals, a world-leading health data research infrastructure and up to £520 million for innovative manufacturing via the Life Sciences Innovative Manufacturing Fund⁵.

Key initiatives include low-friction procurement mechanisms, rapid new medicine and technology access and partnerships with industry to keep the NHS at the innovation frontier, all anchored around the goals of digital transformation, prevention and patient-centred care.

The medtech sector is among Europe's most advanced, exporting more than £5.4 billion annually and building on a network of more than 4,400 businesses. With the majority of enterprises operating as small or mid-sized companies, efforts to drive commercialisation, access to research testbeds, and international partnerships are only intensifying⁶.

There are several key organisations that support the sector's research and development stages⁷. The Clinical Practice Research Datalink (CPRD), for instance, offers invaluable anonymised primary care records to support public health research. The Engineering and Physical Sciences Research Council (EPSRC) has centres for innovative manufacturing that focus on areas such as medical devices and regenerative medicine, promoting research collaborations and innovation.

Meanwhile, biotech investment soared to £3.5 billion in 2024, reflecting both global investor confidence and an active clinical and

preclinical pipeline. Here, regulatory support from the Medicines and Healthcare products Regulatory Agency (MHRA), including the new Innovative Licensing and Access Pathway (ILAP), is reducing the time to market for new therapies, critical for translating UK scientific leadership into industry and patient benefit⁸.

Shaping the future

While the sector's fundamentals are strong, challenges remain. The UK must continue to bridge the gap between research and rapid commercial adoption, expand advanced manufacturing, and grow the pool of digitally skilled workers. Initiatives are underway, from Catapult-led workforce programmes to government investments in health innovation zones, aimed at supporting high-value regional jobs and ensuring that transformative breakthroughs reach all communities.

International collaboration is also accelerating, with UK innovation hubs forging partnerships across Europe, North America and Asia, helping British businesses scale globally while attracting foreign capital and expertise.

With unrivalled government support, a legacy of research excellence, entrepreneurial momentum, and a powerful integration of technology and data, the UK's healthcare and life sciences sector is uniquely positioned for the decade ahead. Ongoing strategy, substantial investment and an ethos of partnership will ensure Britain remains at the centre of medical science, technology and patient-focused progress worldwide. ■

¹ <https://www.nhsconfed.org/publications/autumn-budget-2024-what-you-need-know>

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³ <https://mndresearch.blog/2025/03/12/uk-clinical-trial-updates-to-look-out-for-in-2025/>

⁴ <https://mcleanpublic.com/insight/the-uk-catapult-network-in-2025-what-next/>

⁵ <https://www.gov.uk/government/news/life-sciences-sector-plan-to-grow-economy-and-transform-nhs>

⁶ <https://www.knightfrank.co.uk/research/reports/science-and-innovation-insight-2665/contentassets/life-sciences-innovation-insight-q3-2024-11669.pdf>

⁷ <https://www.gov.uk/government/publications/uk-life-sciences-support/medical-technology>

⁸ <https://www.bioindustry.org/resource/uk-biotech-accelerates-growth-with-3-5-billion-investment-surge.html>

Education & Skills: Building tomorrow's workforce

The UK has long been globally recognised for the strength of its education system, with numerous institutions among the world's elite. As of 2025, the country boasts three universities in the global top 10, with Oxford maintaining its position as the world's highest rated university for the ninth consecutive year according to Times Higher Education. The universities of Cambridge and Imperial College London also make it into the top 10, with another six institutions in the top 50¹.

The Government's commitment to educational excellence is reflected in its International Education Strategy, launched in 2019 and refreshed in 2023². This ambitious blueprint targets two milestone achievements by 2030: expanding education exports to £35 billion per year and accommodating 600,000 international students annually in higher education.

Academic framework

Britain's educational system includes both publicly funded institutions and fee-paying independent schools. The most distinguished private establishments – globally recognised names such as Eton, Harrow, Winchester and St Paul's – are generally known as 'public schools'.

The National Curriculum is the cornerstone educational framework and is highly regarded as preparation for both domestic and international university admission. It operates across primary education (up to age

11) and secondary education (11-18 years). Educational standards are monitored and maintained through quality assurance systems, though implementation varies across England, Scotland, Wales, and Northern Ireland. England utilises Ofsted for school oversight, Wales uses Estyn, while Scotland employs Education Scotland. Curricular differences also exist: Scottish students pursue 'Highers' rather than A levels for university qualification, for example.

Technology-enhanced learning

British schools invest approximately £900 million per year in education technology (EdTech) and the sector has emerged as a magnet for global investment. The country hosts over 1,000 EdTech enterprises. The sector was worth £25.7 billion in 2025 and has attracted nearly £1 billion in investment. It is projected to reach over £35 billion by 2027³.

UK colleges and universities are global leaders in the use of EdTech and offer their courses to students worldwide through remote online portals. The country is a market-leading provider of Transnational Education (TNE) programmes, enabling overseas students to study courses either online or via 40 overseas UK campuses. Over 82% of universities offer TNE programmes.

EdTech platforms, including cloud-based Learning Management Systems (LMS), are being rapidly adopted across the education

sector. LMS present compelling investment opportunities, as increasing numbers of institutions use cloud technologies to support the delivery and management of learning resources. These platforms consolidate materials and assignments on unified platforms, enabling students and educators to access resources outside the typical classroom setting.

The Government's dedication to digital education, as evidenced by its EdTech Strategy, encourages educators to investigate innovative teaching methods and resources by integrating technology into the classroom. In May 2025, the Department for Education announced a new investment to test and evaluate EdTech tools being used in schools and colleges⁴. This initiative, delivered in partnership with the Open Innovation Team, will explore how technologies impact teacher workload, pupil outcomes and inclusivity.

The growing recognition of personalised learning benefits has further accelerated EdTech adoption. Educational institutions are responding with increasingly sophisticated solutions including mixed reality experiences, immersive learning content, and massive open online courses (MOOCs).

In higher education innovation, Britain pioneered distance learning through the Open University, which subsequently established FutureLearn as its dedicated EdTech division.

FutureLearn delivers diverse online learning opportunities from globally recognised universities and organisations, spanning micro-



credentials and short courses to full degree programmes. The platform serves over 18 million learners worldwide, offers more than 5,000 online courses, and maintains partnerships with over 250 leading universities, international brands, and government agencies, including prestigious institutions like Cambridge University and global corporations such as Samsung.

In April 2025, FutureLearn signed an exclusive partnership with the Strategic Gears Academy in Saudi Arabia, the corporate learning brand of consulting firm Strategic Gears. Through this collaboration, organisations in the Kingdom will gain access to customisable course



The education sector has demonstrated remarkable adaptability and innovation, using recent challenges as catalysts for accelerated technology adoption.



bundles from the best-in-class FutureLearn catalogue, tailored to their specific learning needs, and in strict alignment with the National Skills Framework, overseen by the Ministry of Human Resources and Social Development in Saudi Arabia⁵.

AI and machine learning integration

The UK is also at the forefront when it comes to educational AI applications. AI technology offers significant potential to reduce educator workloads while enhancing classroom effectiveness. Automated systems can handle routine administrative tasks including assessment marking, feedback provision and attendance monitoring, enabling teachers to concentrate on instruction rather than administration.

With the country anticipating substantial expansion in its AI sector, machine learning technologies are expected to contribute approximately £630 billion to the national economy by 2035⁶. Reflecting this potential, the Government plans to provide every English teacher with AI-powered educational tools designed to support lesson preparation, performance tracking and workload reduction.

The education sector has demonstrated remarkable adaptability and innovation, using recent challenges as catalysts for accelerated technology adoption. Combined with strong government commitment and the sustained excellence of Britain's educational institutions at all levels, this sector presents exceptional growth opportunities for investors. ■

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² <https://www.gov.uk/government/publications/international-education-strategy-2023-update/international-education-strategy-2023-progress-update>

³ <https://thedatacity.com/rtics/ed-tech-rtic0010/>

⁴ <https://edexec.co.uk/bridget-phillipsons-vision-for-edtech/>

⁵ <https://www.futurelearn.com/info/press/futurelearn-and-strategic-gears-forge-exclusive-partnership-to-drive-upskilling-in-saudi-arabia>

⁶ <https://thedatacity.com/rtics/ed-tech-rtic0010/>

Energy: Greener, leaner and leading change

The UK is undergoing a dynamic transformation within its energy industry, driven by bold legislation and a commitment to decarbonisation. Ambitious national targets, an accelerated renewable rollout, and continued investment in nuclear power are reshaping the country's energy mix, attracting significant domestic and international interest.

Three strategic forces are behind this transformation. The country's statutory obligation to reach net zero greenhouse gas emissions by 2050 remains the backbone of energy policy. This path was strengthened in 2023, when carbon cutting milestones of a 68% reduction by 2030 and a world-leading 77% cut by 2035 (relative to 1990 levels) were instituted, cementing the nation's leadership in climate ambition¹.

Decentralised generation is another priority. An increasing proportion of renewable electricity is now produced closer to end users, reducing grid pressure, enhancing energy resilience, and cutting infrastructure costs. Escalating global energy costs are also accelerating digitalisation and efficiency measures across the sector, boosting sustainability while driving down operational expenses.

Setting new benchmarks

In 2024, UK renewables generated an unprecedented 50.8% of the nation's electricity – eclipsing 50% annually for the first time. This equated to a record 144.7TWh, bolstered by higher wind speeds,

new capacity, and sustained policy support². Fossil fuel reliance fell sharply, with its share dropping to 31.5%, levels not seen since the 1950s, and marking a third consecutive year of declines as coal power was fully phased out by October 2024.

The UK Government's renewable energy strategy is highly ambitious and comprehensive, representing a whole-economy approach to leadership in the global green transition. Building on its '10 Point Plan for a Green Industrial Revolution', the Government's strategy has continued to evolve with the 2025 Clean Energy Industries Sector Plan and new investment frameworks³.

The 2025 plan targets at least a doubling of current investment across key clean energy sectors – wind, solar, hydrogen and grid infrastructure – reaching over £30 billion per year by 2035. Since 2024 alone, private investment commitments to UK clean energy have exceeded £40 billion, a surge reflecting growing international confidence in government policy and supportive market signals. The creation of a £700 million Great British Energy fund, a government-backed financial vehicle, and further investment in domestic supply chains, are key pillars of efforts to anchor the new low-carbon revolution in UK industry and jobs⁴.

Great British Energy

The £700 million Great British Energy fund is being channelled into several strategic priorities to supercharge the UK's clean energy

transition. A significant portion is devoted to expanding domestic manufacturing, helping to establish and grow UK-based factories that produce vital components for clean power projects. This includes facilities for building floating offshore wind platforms, manufacturing high-voltage cables and pioneering advanced hydrogen infrastructure. By focusing investment here, the Government aims to reinforce supply chain resilience and increase the use of British-made parts in upcoming energy developments⁵.

At the same time, the fund builds on earlier support for offshore wind, elevating the total public investment in UK offshore wind supply chains to £1 billion when combined with industry and Crown Estate contributions. This approach not only supports the rapid expansion of offshore wind projects boasting significant UK content, but also stimulates job growth in coastal and industrial communities nationwide.

While the main thrust of funding is directed toward driving industrial innovation, a portion is also allocated to community-based renewable initiatives. This includes investments in rooftop solar installations, battery storage and energy efficiency upgrades for public spaces such as schools, hospitals, libraries and care homes. To this end, targeted grants are being distributed to local authorities, enabling projects that reduce energy bills and enhance the sustainability of key community facilities.



The strategy is not just about decarbonisation, but about unlocking long-term economic opportunity. More than 55,000 people are now directly employed in the wind sector alone, a 25% rise in two years, with the supply chain's contribution estimated to boost the UK economy by £25 billion this decade⁶. The plan includes targeted skills programmes, local content requirements, and levelling up industrial clusters in regions like the Humber, Scotland, Wales and the North East.



More than 55,000 people are now directly employed in the wind sector alone, a 25% rise in two years.



Nuclear energy remains integral to Britain's energy security strategy. In 2024, nuclear power generated 14.25% (40.6TWh) of UK electricity, consistent with the previous year but below historic highs. The Government's commitment to tripling nuclear capacity by 2050 was given fresh impetus through continued investment in existing stations and new large-scale and modular projects. Notably, extensions to the operating life of plants such as Heysham 2 and Torness ensure capacity is sustained into the next decade. Plans for a new plant at Wylfa and the growing focus on Small Modular Reactors (SMRs) signal a long-term vision for a secure, low-carbon future⁷.

Policy and market delivery

To realise its ambitions, the Government is reforming the Contracts for Difference (CfD) regime to ensure stable, investable returns for renewables, clearing long queues for grid access, and launching

sectoral industrial strategies for clean power technologies. Policy is also focused on ensuring energy remains affordable and inclusive, including electrification of transport and buildings. The emphasis on export potential is also strong, positioning the UK as a hub for global clean energy technology and expertise⁸.

Investment landscape

The shift towards renewables and nuclear not only reduces emissions but also creates robust opportunities for private and international investment. Challenges such as supply-chain constraints and the need for grid upgrades remain, but substantial funding of up to £29 billion per year by 2035 is projected to fuel further growth in offshore wind alone. The Government's stated aim is clear: foster innovation, ensure security and secure the UK's leadership position in clean energy for decades to come. ■

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⁶ <https://www.renewableuk.com/news-and-resources/press-releases/renewableuk-welcomes-ten-year-government-plan-to-create-investment-growth-and-good-jobs-in-clean-energy/>

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⁸ https://assets.publishing.service.gov.uk/media/68587856b46781eacfd71de4/industrial_strategy_clean_energy_industries_sector_plan.pdf



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