Medical Residency Program

Investment Opportunity - Higher Education

EDUCATION

استثمر في السعودية
INVEST SAUDI

Medical Residency Program

OPPORTUNITY DESCRIPTION: Invest in KSA's education sector by establishing/expanding an institution to offer medical residency program

OPPORTUNITY OVERVIEW

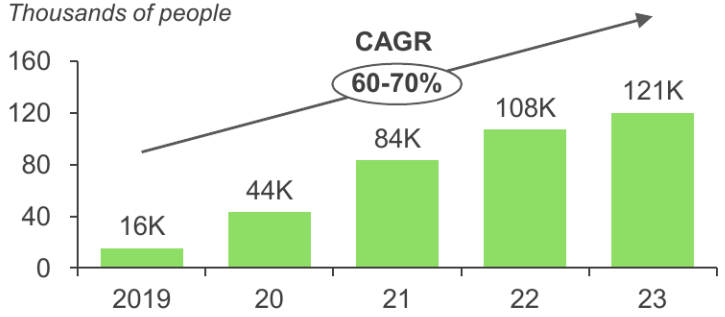
Medical Residency Overview

A medical residency is training that aspiring doctors undergo after completing their MBBS programs, conducted in a hospital or a clinic, and designed to provide practical experience and technical skills required by trainees to become specialized doctors

Demand for healthcare workforce in KSA is growing rapidly

Cumulative demand for healthcare workforce, KSA[1] 2019-23

Thousands of people



~99K Number of physicians in the KSA healthcare workforce in 2021

Growth Drivers and Current Providers

Demand for more residency seats is driven by an evolving healthcare system and a strong government focus

Growth Drivers

- Increased demand for quality care
- Increased demand for healthcare services
- Increasing life expectancy
- Saudization requirements
- Increasing disease incidence
- Growing disposable income

Despite a stringent regulatory environment, both national and international providers exist for medical residency

Current Supply

NOT EXHAUSTIVE

International Providers

مركز جونز هوبكنز أرامكو الطبي
Johns Hopkins Aramco Healthcare

Regional Providers

المركز الطبي الدولي
International Medical Center

KSAU-HS
KING SAUD BIN ABDULAZIZ UNIVERSITY FOR HEALTH SCIENCES
A University for the Nation's Health

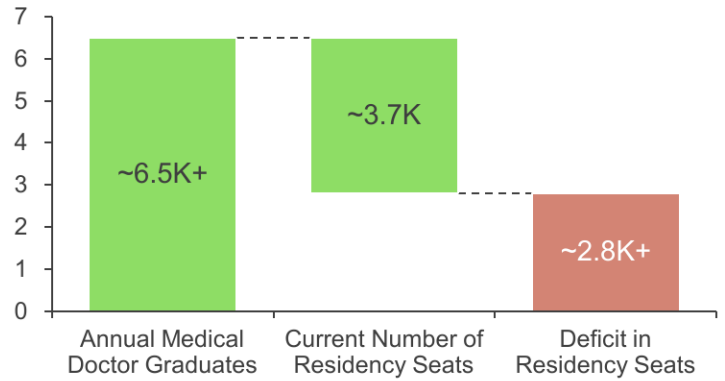
مستشفى الملك فيصل التخصصي ومركز الأبحاث
King Faisal Specialist Hospital & Research Centre

Unmet Demand and CAPEX outlay

More than 2.8K residency seats are needed to match the supply of annual medical doctor graduates

Demand-supply mismatch for residency seats 2030F[2]

Number of students



~2.8K annual deficit can be met via establishing more medical residency seats with a proposed enrolment scale of ~11K assuming an average course duration of four years

~2.8K *Annual deficit in residency seats*

~11K *Forecasted enrolment scale based on annual deficit*

amics
arbook 2021

Medical Residency Program

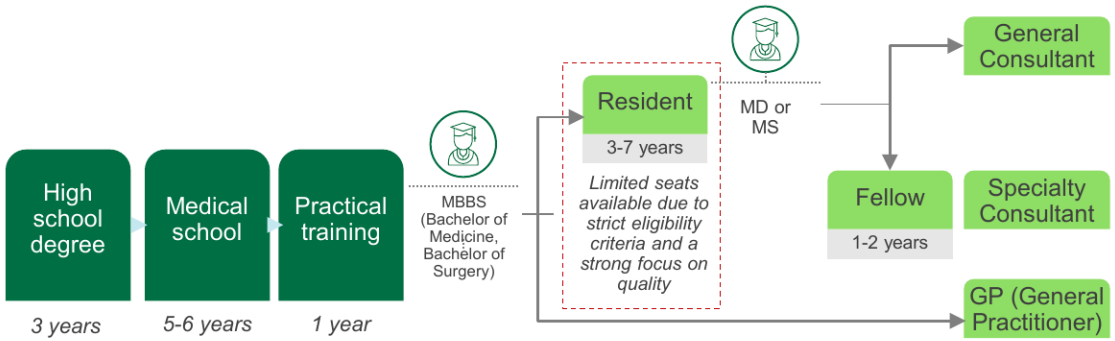
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INTRODUCTION AND PROGRAM OFFERINGS

Introduction to Medical Residency

A medical residency is training that aspiring doctors undergo after completing medical school that happens in a hospital or a clinic, and is designed to provide practical experience and technical skills required by trainees to become specialized doctors

Medical Education Pathway in KSA



الهيئة السعودية للتخصصات الصحية
Saudi Commission for Health Specialties

SCFHS regulates the supply of residency seats in KSA and is now revamping some of the steps involved in establishing residency programs by making the eligibility criteria less stringent

Program Offerings

NOT EXHAUSTIVE

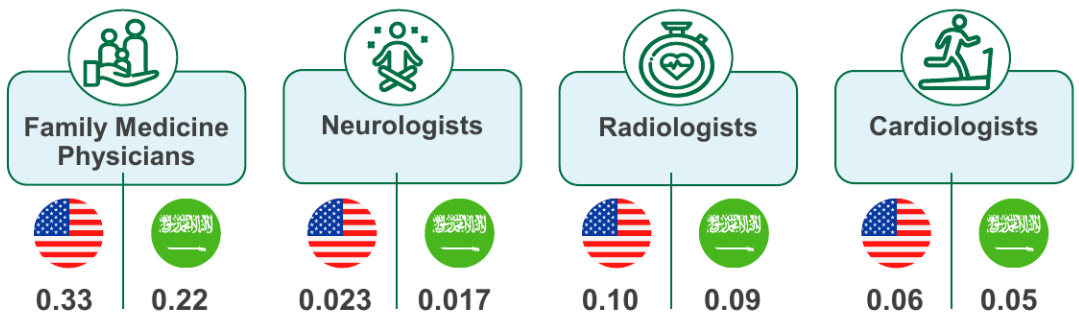
Residency Programs

Anesthesia	Blood Diseases	Dentistry
Dermatologist	E.N.T	Medical Imaging
Obstetrics and Gynecology	Ophthalmologist	Pediatric Surgery
Skin and Venereology	Surgery	Urology

NOT EXHAUSTIVE

Select Examples of Undersupplied Medical Specialties in KSA

Physician population as a proportion of 1K people, KSA vs USA



)21, USBLS

Definitions

#	SCORECARD SECTION	DEFINITIONS
1	Market size	Size of market in value/volume in KSA and/or Region (MENA/GCC) covering future projections based on available estimates from published /government sources
2	Business drivers	A select number of factors that will influence future demand for the related product/service
3	Investment highlights	An overview of key financial metrics summarizing the investment opportunity along with the expected return based on the suggested investment size
4	Value proposition	Summary of key differentiators that position KSA as a strategic choice over other regional/global peers
5	Market readiness	An overview of KSA market structure, market maturity and level of participation by local and global players
6	Global trends	Latest business developments within the sector/product category
7	Scalability and localization	Ease of scaling the business across the value chain or into new adjacent products or geographies that would maximize the opportunity's investment returns and the ability and potential to locally manufacture the product and its components
8	Import dependency	An overview of the countries from which Saudi Arabia is importing the product and their value/volume and share in total imports
9	Value chain analysis	The process or activities that would potentially need to be carried out to deliver the underlying product or service
10	Key stakeholders	Government institutions, organizations, and/or authorities that participate or influence the market for the underlying product/service
11	Enablers	Factors that enable investment in the underlying opportunity
12	Cost of doing business in KSA	Key factors that position KSA as a competitive destination for investment in the region. Productivity adjusted wages do not include cost of $1.23/hour towards annual recurring charges including work permit, resident identity (iqama) and health insurance

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