Nursing Schools

Investment Opportunity – Higher Education

EDUCATION

استثمر في السعودية
INVEST SAUDI

Nursing Schools

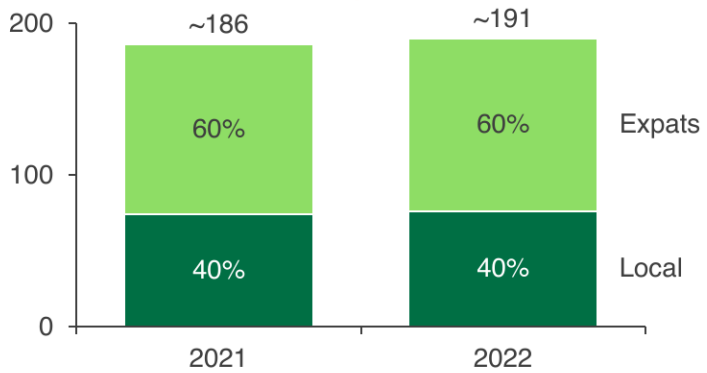
OPPORTUNITY DESCRIPTION: Invest in KSA's education sector by expanding the capacity of Nursing Schools to meet the existing shortage of qualified nurses

OPPORTUNITY OVERVIEW

Current Landscape

Number of Nurses, KSA (2021-22); 000s of nurses

Currently, local nurses account for 37% of the total nurses in KSA



5.7 Nurses per 1,000 people in KSA vs OECD average of ~9-9.5

48 Nursing schools[1] in KSA of which 14 are private

Key Growth Drivers and Challenges

Growth Drivers for Nursing Schools in KSA

- Growing population
- Changing/Sedentary Lifestyle
- Lack of local provision
- Increasing life expectancy
- Saudization
- Regulations focusing on high quality nursing

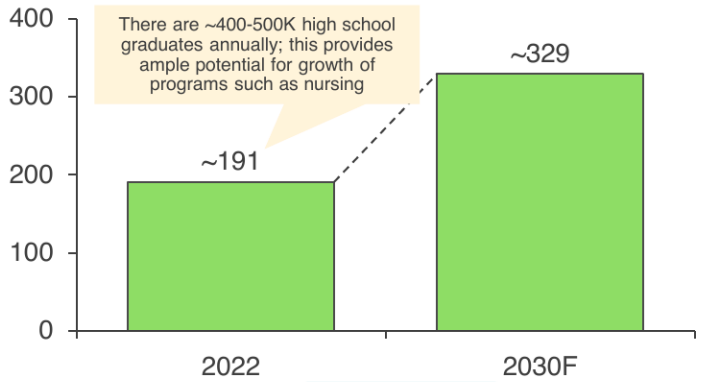
Current challenges with Nursing Education in KSA

- Low Nursing School[1] capacity
- Uneven quality
- Retraining Diploma Nurses
- High reliance on expat nurses
- Unequal regional distribution
- Low number of nursing graduates

Sector Outlook

Nursing demand estimate, KSA (2022-30F); 000's of nurses

There are ~400-500K high school graduates annually; this provides ample potential for growth of programs such as nursing



- ~138K — Increment in topline number of nurses by 2030F
- ~18K — Number of graduates required from nursing programs every year for the next 8 years[2]
- ~50-60 — Number of new nursing institutes required (assuming~300-400 graduates per institute per year)

[1] either the private or public sector offering Bachelor's and Bridging Nursing Programs; [2]Number of nurses that will need to be trained
be trained to compensate for the churn in the system and hence higher than total increase in topline forecast

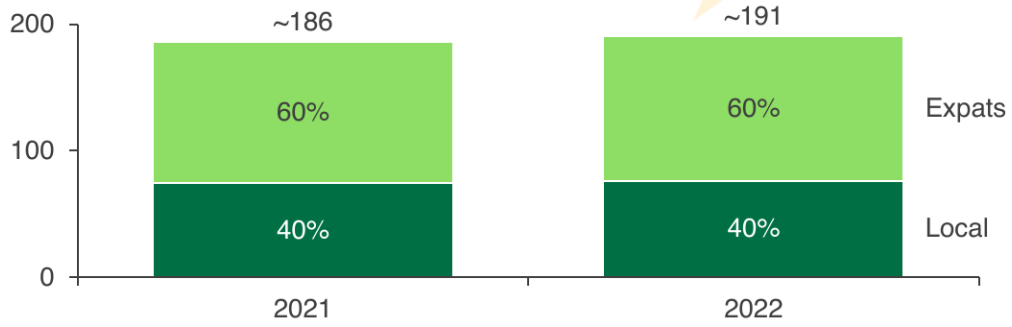
Nursing Schools

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KSA NURSING SECTOR OVERVIEW

Employment in Nursing KSA

Number of Nurses, KSA (2021-22); 000s of nurses



5.7 Nurses per 1,000 people in KSA

48 Nursing schools[1] in KSA of which 14 are private

~9-9.5 OECD Average Nurses and Midwives per 1,000 people

59% Healthcare professionals globally are nurses

Challenges facing the Nursing Sector in KSA

Low Nursing School Capacity — The current capacity of nursing schools is insufficient to meet the local demand

High reliance on expat nurses — ~60% nurses are expats coming from countries like India, Philippines, etc.

Uneven Quality — Many local nurses lack the skill and knowledge to provide high-quality care

Unequal Regional Distribution — Per capita number of nurses varies widely across the Kingdom, from 4 per 1000 population in Jazan to 9 per 1000 in Al-Jawf

Retraining Diploma nurses — ~75% of the local nurses have a diploma and need bridge courses to continue as registered nurses

Low number of nursing graduates — KSA has only 11 nurses graduating every year for every 100,000 people (OECD avg. 46)

[1] with either the private or public sector offering Bachelor's and Bridging Nursing Programs

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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