

Mature

AI POWERED Capacity Planning

INVESTMENT OPPORTUNITY SCORECARD

ICT

July 2021



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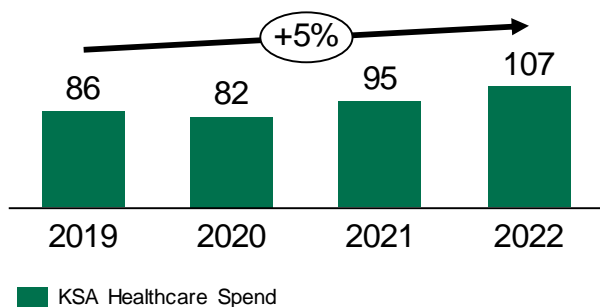


Integrates and analyses hospital logistics, resource scheduling, patient flow data and suggests optimal resource allocation (e.g., staffing, scheduling) which will ease the access to healthcare services by sufficient overall capacity, appropriate geographical distribution and providing timely access to relevant services

DEMAND

INVESTMENT OVERVIEW

MARKET SIZE, USD Mn



INVESTMENT HIGHLIGHTS

- Opportunity to consider different operating models – FDI with 100% ownership or joint venture with local private sector player(s)
- Healthcare institutions are investing in AI-powered capacity planning to optimize patients needs, decreases costs due to more efficient operations and better capacity utilization, and finally significantly impacts efficiency outcomes across operations

VALUE PROPOSITION

- Health services in Saudi Arabia have developed enormously over the last two decades, as evidenced by the availability of health facilities throughout all parts of the vast Kingdom
- Healthcare is a vital sector in the Saudi Vision 2030 and the National Transformation Program, with one of NTP's strategic objectives is to Improve the Quality and Efficiency of Healthcare Services
- In KSA's 2019 budget, Social and Health sector holds the third largest share in the budget expenditure by SAR190 billion in 2019, The budget is also increasing on annual basis which indicates the government willingness to embrace the improvement & growth in the sector.

KEY DEMAND DRIVERS

- According to the Healthcare Transformation strategy of MoH, there are significant gaps in workforce capacity allocation, as the health system lacks robust, consistent and integrated digital information systems to manage and oversee allocation, quality, and efficiency of resources
- Demand on capacity management tools is increasing due to its potential to reduce waiting times for patients, improve patient experience and outcomes, and free up resources in healthcare facilities

MARKET OVERVIEW

MARKET READINESS AND COMPETITOR ANALYSIS

- Limited local players exist in Saudi Arabia (e.g. Open Software Information Technology Company, Lean business services, AL-haya medical company, and Philips)

COMPETITOR ANALYSIS



GLOBAL TRENDS

- The customer self-service software was valued at USD 7.20 billion in 2020, and is expected to register at a compound annual growth rate (CAGR) of 32.3% from 2020 to 2027
- The benefits of automated customer support is to provide customers with instant access to information, allow personalization, and save valuable time and organizational resources



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SUPPLY

SCALABILITY AND LOCALIZATION

Grade: Low Medium High

- In 2017, MoH developed and implemented a project called “Automation of healthcare planning”, which aims to create an electronic system to analyse the current situation determining the needs health care services
- KSA has advanced network of hospitals across its Northern, Eastern, Southern, Western and Central regions

IMPORT DEPENDENCY

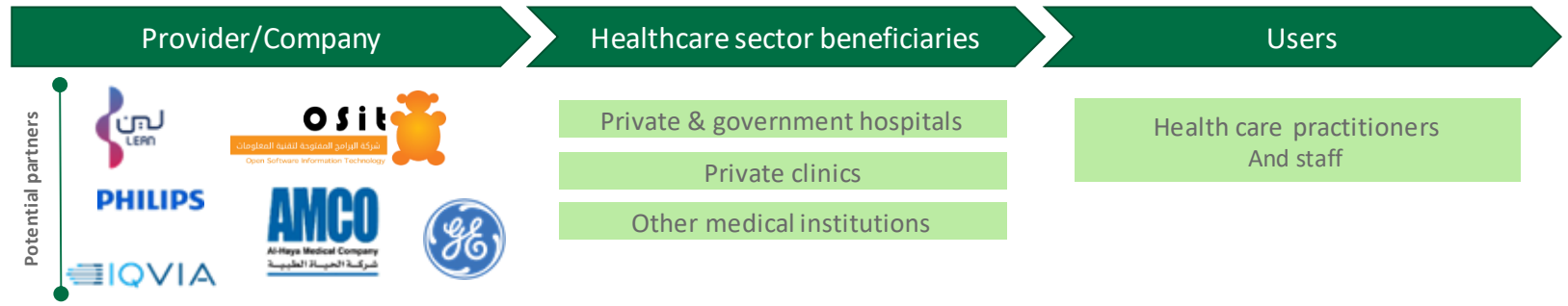
- Currently there is few presence of local players/platforms serving the market, such as Open Software Information Technology Company, Lean business services , AL-haya medical company. With future plans to partner with international players such as Philips

ENABLING FACTORS

ENABLERS

- Foreign investors can now have 100% ownership in the healthcare sector
- Tax concessions & credits
- KSA provides numerous investor licenses and visas such as Investment license special Privilege Iqama Law

Ecosystem analysis



COST OF DOING BUSINESS IN KSA

Factor	Ranking Amongst Regional Peers
Global AI Index (1-62)	22
Global Health Security Index (1-195)	47
AI readiness Index (1-172)	38
Customs Clearance Index (1 – 5)	45

KEY STAKEHOLDERS



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	Demand 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	Competitor analysis	List of the local & international players manufacturing the underlying product in Saudi Arabia and their market share
7	Global trends	Latest business developments within the sector/product category
8	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
9	Import dependency	An overview of the countries from which Saudi Arabia is importing the product and their value/volume and share in total imports
10	Value chain analysis	The process or activities that would potentially need to be carried out to deliver the underlying product or service
11	Key stakeholders	Government institutions, organizations, and/or authorities that participate or influence the market for the underlying product/service
12	Enablers	Factors that enable investment in the underlying opportunity
13	Cost of doing business in KSA	Key factors that position KSA as a competitive destination for investment in the region

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