

Allied Healthcare Training

Investment Opportunity – TVET

EDUCATION – April 2022





Allied Healthcare Training

OPPORTUNITY DESCRIPTION: Invest in KSA's education sector by establishing TVET centers for Allied Healthcare Training

OPPORTUNITY OVERVIEW

Overview of KSA Allied Health Sector

Allied health refers to medical processes that are complementary to the work of general and specialty medical practitioners

Allied Health fields

- Laboratory
- Pharmacy
- Radiology
- Public Health
- Health Services' Management
- Health Informatics
- Rehabilitation
- Dental

Allied Health workforce in the Kingdom has been on the rise since the last 3-4 years



Growth in number of Allied Health personnel in KSA [CAGR (2017-20)]



Share of Ministry of Health employees in the Allied Health sector

Laboratories, Pharmacies, and Radiology are the largest employers of Allied Health personnel in the Kingdom

Growth potential of Allied Health in KSA

Growth of the Allied Health sector in KSA is driven by multiples reasons

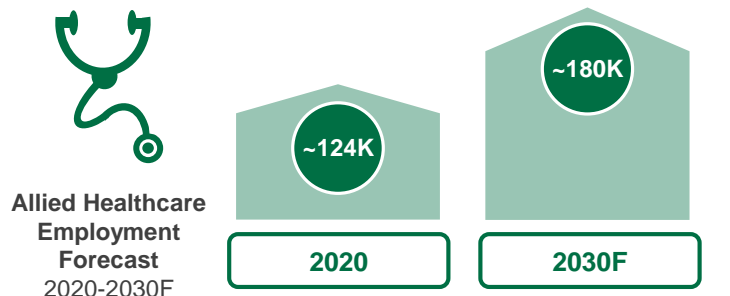
- 1 Growing population with increasing life expectancy
- 2 Changing/Sedentary Lifestyle
- 3 Rising health insurance coverage
- 4 Expansion of medical facilities (e.g., medical cities)
- 5 Enhanced medical detection technology
- 6 Increased awareness and social acceptance

Allied Health fields with growth potential

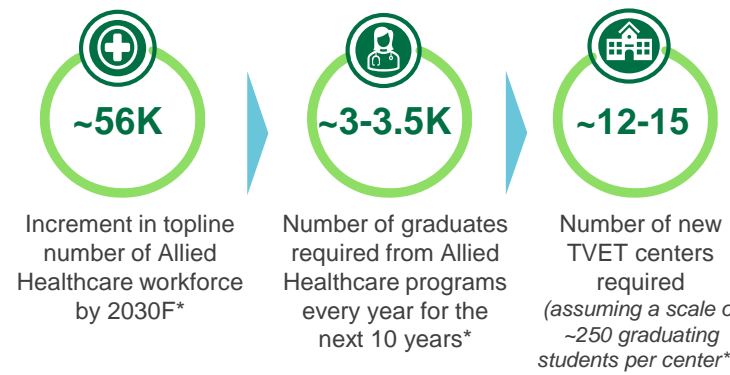
- Laboratories and other diagnostic fields such as Radiology
- Health Services Management
- Speech / Hearing Therapy
- Health Informatics

Current Provision & Demand Forecast

TVET provision for Allied Health must increase in tandem with increasing workforce demand in the sector



The Allied Health workforce in KSA is expected to grow at ~4% CAGR from 2020 to 2030F



Note: * Number of professionals that will need to be trained will include those who will need to be reskilled as well as those who will be trained to compensate for the churn in the system, and hence higher than total increase in topline forecast; ** 3-5-year programs and assume, on average, 250 seats for each year of study (i.e., 1K total capacity per center)



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OVERVIEW OF ALLIED HEALTHCARE IN SAUDI ARABIA

Introduction to Allied Healthcare



Description

Allied healthcare refers to medical processes that are complementary to the work of general and specialty medical practitioners

Allied Health fields



Laboratory



Pharmacy



Radiology



Public Health



Health Services' Management



Health Informatics



Rehabilitation



Dental

+ 12*
Other allied health fields

Growth drivers for Allied Healthcare workforce in KSA



Growing population



Higher life expectancy



Changing/Sedentary Lifestyle



Rising health insurance coverage



Expansion of medical facilities (e.g., medical cities)



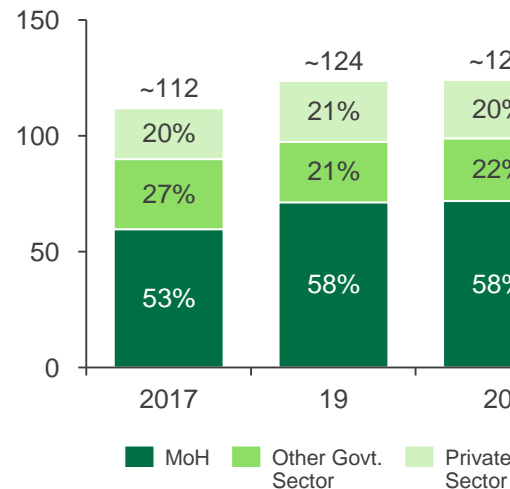
Enhanced detection / diagnosis tech.



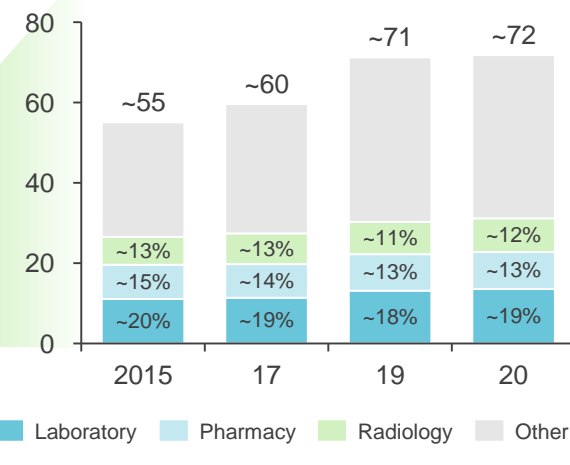
Increased awareness

Allied Healthcare Workforce in KSA

Allied Health Personnel, KSA (2017-20); 000's of people



MoH Allied Health Personnel in KSA, by discipline (2015-20); 000's of people



The number of allied health personnel in the Kingdom has **been on the rise** and has **grown at ~3% CAGR** from 2017 to 2020

Laboratories, pharmacies, and radiology employ >40% of the allied health personnel in the Kingdom

Fields of **Health Services' Management, Public Health, Social Services, and Hearing/Speech Therapy** are the fastest growing

Note: *Other allied health fields in KSA are Surgical Operations, Social Services, Anaesthesia, Nutrition, Psychotherapy, Optometry, Sterilization, ECG & EEG, Hearing & Speech Therapy, etc.



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NEED FOR ALLIED HEALTHCARE TRAINING IN SAUDI ARABIA

Allied Healthcare growth trends in KSA



Laboratories and other diagnostic fields such as Radiology are expected to see an uptick in demand owing to an **increase in aging population** and an **increase in adoption of healthier lifestyles**



Speech/Hearing therapy is expected to drive future growth in Allied Healthcare because of **early diagnosis** and **better survival rates for the hearing/speech impaired**, **increased sensitivity** towards their inclusion in the society, and **rising old age population**



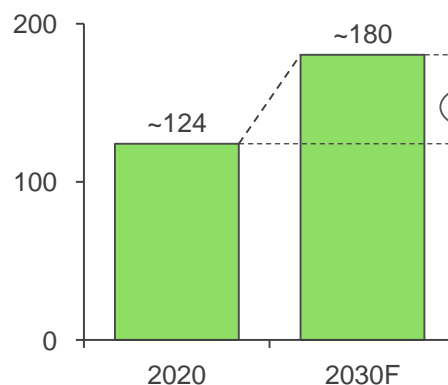
Health Services' Management accounts for **~7% of the total allied health personnel** in the Kingdom and is expected to grow in the future by virtue of **increasing healthcare demand** in the KSA



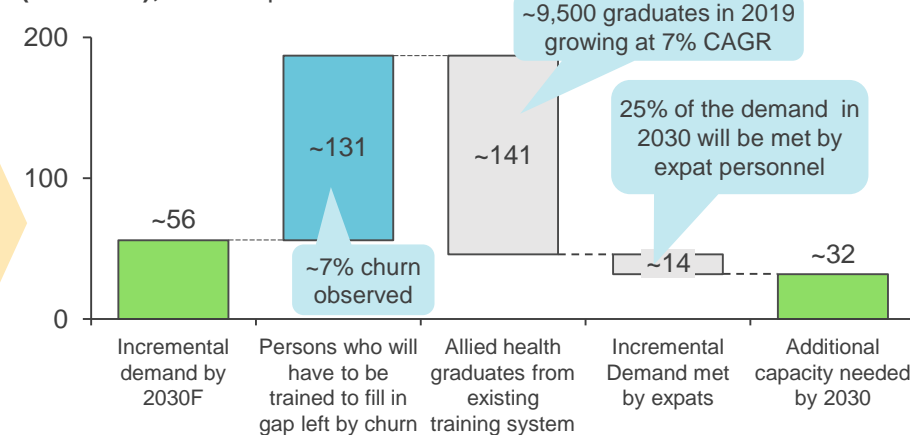
With increasing focus on **digitalization** in the healthcare sector in KSA, the demand for personnel trained in **Health Informatics** and related fields is expected to rise in the future

Demand forecast for Allied Healthcare Training in KSA

Allied health workforce estimate, KSA (2020-30F); 000's of people



Additional Allied Health training capacity estimate, KSA (2020-30F); 000's of personnel



Additional persons to be trained (graduates) in Allied Health programs over next 10 years

~30-35K



Number of Allied Health program graduates required each year

~3-3.5K



Average number of graduates each year from a single TVET center*

~250



~12-15

Number of additional training centers required

Note: * For a TVET center offering 3-5-year programs and assume, on average, 250 seats for each year of study (i.e., 1K total capacity per center)



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CASE STUDY OF EXISTING TRAINING PROVIDERS/PROGRAMS

Existing Allied Healthcare education/training programs

SAMPLE LIST OF ALLIED HEALTH TRAINING / EDUCATION PROVIDERS



To meet the growing needs of the Allied Healthcare sector, **~56K additional workforce** will be required to support the **~124K** workers currently employed by the sector

Case Study: Dar Al-Hekma University



- Established in 1999, Dar Al-Hekma is a private, not-for-profit university for females in Jeddah
- Dedicated school of Health, Behavioral Sciences, and Education which offers degree programs in collaboration with international universities
- Offers one of the few undergraduate programs in speech language and hearing sciences in KSA and the only graduate program in speech-language pathology in the Kingdom
- The university aims to train professionals to be able to effectively cater to the needs of individuals with communication challenges in the Kingdom



Case Study: Makken Program



- Launched in September 2021, Makken Healthcare Model Program targets promoting healthy communities in the Kingdom through upskilling and reskilling current workforce based on the new model of care.
- The program is designed in collaboration with global and local partnerships and includes program design, material development, training, and knowledge transfer.



Active learners



Graduates



Number of programs

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