

Mature

# Automated Customer Support

INVESTMENT OPPORTUNITY SCORECARD

ICT

July 2021



# Automated customer support

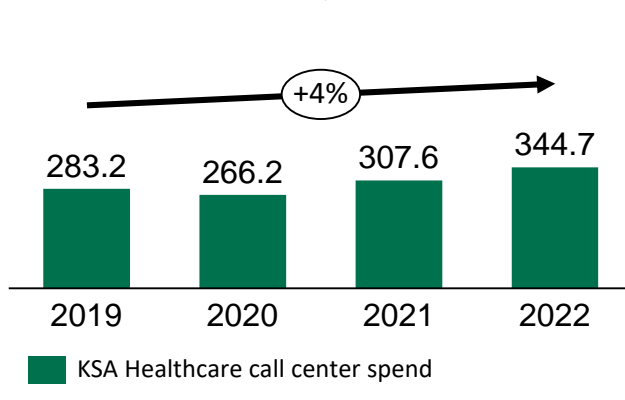
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Using Natural Language Processing (NLP)/Speech recognition to augment/offload human support which will ease the access to healthcare services by providing timely access to relevant services

## DEMAND

### 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 facilities are investing more into technologies such as automated customer services to improve the quality of the services provided to patients

### 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

- 70% of the public in KSA mention that ease of access, procedures, and self-services via smartphones and the online applications are the most important elements in choosing between different health facilities
- Automated customer support can reduce the demand and free up healthcare customer support workers from routine requests to focus on more complex tasks

## MARKET OVERVIEW

### MARKET READINESS AND COMPETITOR ANALYSIS

- Limited players exist in Saudi Arabia (e.g. cloud solutions part of Dr. Sulaiman Al Habib Medical Services Group (HMG) , and Philips)
- There are few voice services and call centre companies exist in Saudi Arabia, but not all of are them specialized in healthcare e.g.(Abacus Cambridge Partners, Smart Link...)

### 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

### COMPETITOR ANALYSIS





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## SUPPLY

### SCALABILITY AND LOCALIZATION

Grade: Low Medium High

- The Ministry of health in KSA is increasing its use and adoption of technologies and digital solution for its healthcare intuitions and hospitals. An example is “Mawid” application from MoH, which enables users to book and manage their own appointments at KSA’s health centers
- MoH has launched additional communication channels on “Whatsapp”, which use interactive chatbots to manage the enquires received regarding Covid-19 and raise awareness
- KSA has advanced network of hospitals across its Northern, Eastern, Southern, Western and Central regions

### IMPORT DEPENDENCY

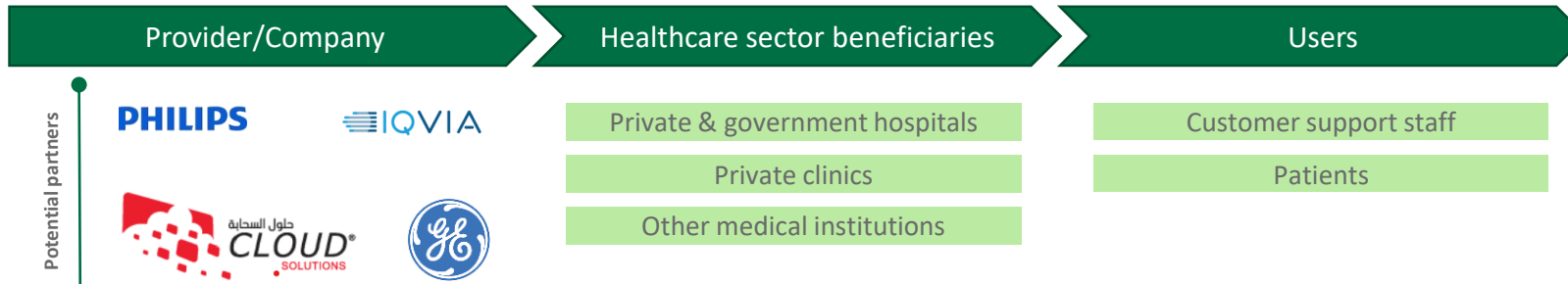
- Currently there is limited presence of local players serving the market, such as cloud solutions. With future plans to partner with international players such as Philips

## 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

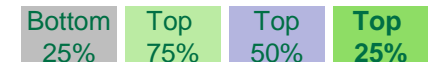
### Ecosystem analysis



### 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	<b>Market size</b>	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	<b>Demand drivers</b>	A select number of factors that will influence future demand for the related product/service
3	<b>Investment highlights</b>	An overview of key financial metrics summarizing the investment opportunity along with the expected return based on the suggested investment size
4	<b>Value proposition</b>	Summary of key differentiators that position KSA as a strategic choice over other regional/global peers
5	<b>Market readiness</b>	An overview of KSA market structure, market maturity and level of participation by local and global players
6	<b>Competitor analysis</b>	List of the local & international players manufacturing the underlying product in Saudi Arabia and their market share
7	<b>Global trends</b>	Latest business developments within the sector/product category
8	<b>Scalability and localization</b>	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	<b>Import dependency</b>	An overview of the countries from which Saudi Arabia is importing the product and their value/volume and share in total imports
10	<b>Value chain analysis</b>	The process or activities that would potentially need to be carried out to deliver the underlying product or service
11	<b>Key stakeholders</b>	Government institutions, organizations, and/or authorities that participate or influence the market for the underlying product/service
12	<b>Enablers</b>	Factors that enable investment in the underlying opportunity
13	<b>Cost of doing business in KSA</b>	Key factors that position KSA as a competitive destination for investment in the region

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