



Executive Forecast: Saudi Arabia 2025: Building a Healthcare Powerhouse

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“Industry leaders aligned in driving sustainable health innovation across the world.”



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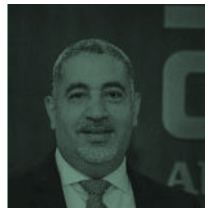
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Executive Summary

Saudi Arabia is strategically overhauling its healthcare sector in a wide-reaching transformation. At the heart of this shift is **Vision 2030**, an ambitious national roadmap launched in 2016 by Crown Prince Mohammed bin Salman. The initiative aims to diversify the Kingdom's economy, reduce its dependence on oil, and lay the foundation for a more sustainable and globally competitive future.

Healthcare is a key pillar in this vision — not just as a public service, but as a critical enabler of economic growth, innovation, and social well-being. Vision 2030 is structured around three core drivers:

- **A Vibrant Society**, focused on quality of life and access to high-quality healthcare
- **A Thriving Economy**, supporting new industries like health manufacturing and biotech
- **An Ambitious Nation**, committed to transparent governance and innovation-led policy

As part of this evolution, Executive Forecast conducted in-depth interviews with more than **30 executives and industry stakeholders** to better understand the pace of change and the scale of opportunities emerging in Saudi Arabia's life-sciences sector. What emerged from those conversations is clear: the Kingdom is not just reforming healthcare — it's redesigning the entire life-sciences ecosystem.

The momentum is tangible. *"The positive performance indicators detailed in the Vision 2030 Annual Report for 2024 reflect the significant qualitative progress achieved across various sectors, including healthcare. Through the Health Sector Transformation Program — one of the key*

Vision Realization Programs — the Kingdom has surpassed its interim targets for this year concerning the quality of healthcare services. The adoption of the new model of care has led to a 40% reduction in premature mortality from chronic diseases, an increase in average life expectancy to 78.8 years, and a rise in beneficiary satisfaction with healthcare services to 84.2%. Furthermore, seven Saudi hospitals have been ranked among the top 250 hospitals globally, underscoring the effectiveness of the health sector transformation and the Kingdom's commitment to building a more efficient and sustainable healthcare system," said Saudi Minister of Health, **H.E. Fahad Abdulrahman Al Jalajel**.



At the same time, local production of pharmaceuticals and medical technologies is accelerating. Speaking at the Global Health Forum, the Minister of Industry and Mineral Resources, **Bandar Al-Khorayef**, reinforced Saudi Arabia's goal to become a global hub for vaccine manufacturing and health industry innovation. Out of the 8,000 drugs currently consumed, 172 have been prioritized for localization, with around 42 targeted for domestic production. This effort is supported by a clear policy framework, attractive investor incentives, and a growing base of advanced manufacturing capacity — including growth from 54 to 150 medical device plants, and from 42 to 56 pharmaceutical factories in just a few years.



Saudi Arabia isn't merely welcoming investment — it's laying the groundwork for sustained growth. For investors, innovators, and strategic partners, the message is clear: the Kingdom's healthcare future is taking shape now.

A man in traditional Saudi attire, including a white thobe and a red and white checkered ghutra, stands on a rooftop, looking out over the illuminated skyline of Riyadh at night. The Kingdom Tower is the most prominent building in the center of the skyline.

ABBOTT'S COMMITMENT TO SAUDI ARABIA'S VISION 2030

Islam Jaber, Managing Director Abbott
Regional Headquarters, highlights Abbott's
efforts in healthcare automation, education,
and local manufacturing in the Kingdom.



Chapter I

“Foundations”:
The Healthcare Transformation

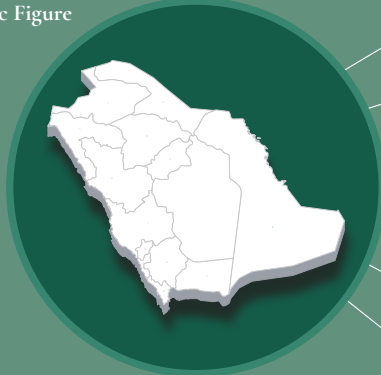
Facts & Figures



“Saudi Arabia’s population is growing, which is a key driver of its market expansion. In addition to the population increase, the country is seeing a rise in regional headquarters and investments, as well as growing interest in non-oil sectors such as tourism, sports, and entertainment. These factors have led to a growing population and a higher number of visitors and residents, making Saudi Arabia an attractive hub for the region.” **Mohamed Mostafa**, Vice President & General Manager Saudi Arabia, Egypt, Libya and Sudan at IQVIA

KSA is the 18th largest economy in the world and the largest in MENA, with high GDP per capita and significant growth

Key KSA Economic Figure



18th Largest economy in the world

1st Largest economy in the MENA region

7th Largest GDP per capita (PPP) among the G20

1st Lowest debt/GDP ratio among G20

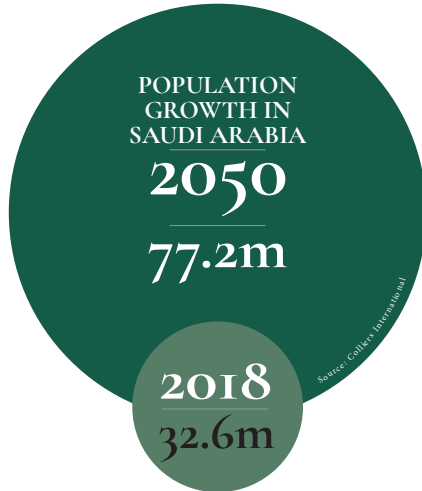
8.8% Lowest debt/GDP ratio among G20

29% FDI stock as percentage of GDP



وزارة الاستثمار
Ministry of Investment

Note: All figures are for year 2021, except for GDP growth for year 2022
Source: CEBR, World Economics, IMF, World Bank, Trading Economics



LIFE EXPECTANCY IN SAUDI ARABIA



2018
73.1

2050
78.4



2018
76.1

2050
81.3

HOSPITAL BEDS IN SAUDI ARABIA



178,000

Number of extra hospital beds needed by 2050

HEALTH CONCERNS IN SAUDI ARABIA

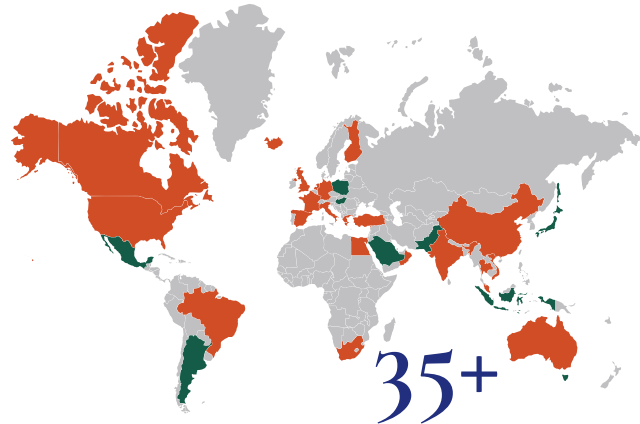
Obesity rates among adults in 2016 **35.4%**

Saudis (20-79) being treated for diabetes in 2017 **3.8%**

The prevalence of hypertension among adults in 2015 **23.3%**

SAUDI ARABIA'S HEALTHCARE ECOSYSTEM: A SUCCESS STORY

Strong inter-country relationships helps the Kingdom leverage the best from across the world



Green: Indirect trade/presence
Red: Direct trade/presence

Number of countries engaged in Saudi's Healthcare sector

EUROPE & NORTH AMERICA

- Clinical research and Product Innovation
- Knowledge and Technology transfer
- Specialized healthcare

ASIA PACIFIC

- Pharmaceutical Generics
- Specialized medical devices
- Skilled Manpower

MIDDLE EAST & AFRICA

Cultural & Geographical proximity & adaptation

LATIN AMERICA

Pharmaceutical generics



The Health Sector Transformation Program

“This ambitious journey paves the way for a sustainable health future reflecting the Kingdom’s global leadership in developing an innovative, high-quality healthcare system.” H.E. Fahad Bin Abdulrahman Al-Jalal, Chairman of the Health Sector Transformation Program Committee and Minister of Health



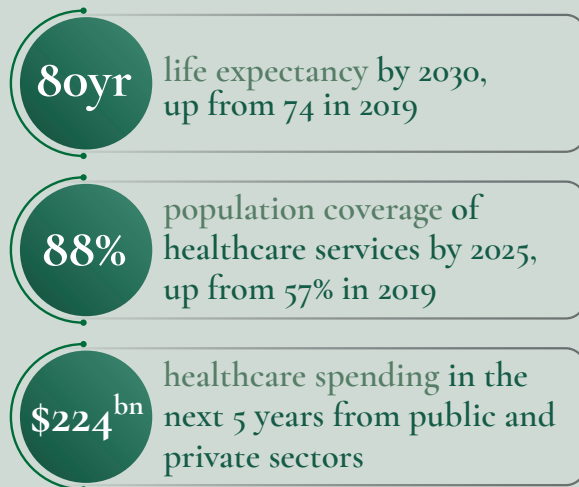
Building a Health System for the Future

The Health Sector Transformation Program (HSTP) is a flagship ‘Vision Realization Program’ under Saudi Arabia’s Vision 2030, created to enable and restructure the Kingdom’s health sector into a comprehensive, effective, and integrated system. *At its core,*

the HSTP is driven by a focus on individual and societal health, ensuring that healthcare reform contributes meaningfully to the Kingdom’s broader economic and social transformation.

This transformation is a direct response to the aspirations of a vibrant society—one that places human well-being and quality of life at the heart of national priorities. The HSTP is designed to strengthen the health sector’s foundations while activating its full potential through cross-sector collaboration, policy reform, and innovation.

KSA’s Healthcare Targets and Plans



Source: Ministry of Investment



Strategic Objectives and Pillars

The HSTP is anchored in four strategic objectives, which serve as the program’s guiding pillars. Each objective is supported by a suite of executive initiatives and tracked through key performance indicators to ensure measurable impact:

- **Facilitating Access to Healthcare Services:** Expanding and improving access across all regions, including underserved and remote areas.
- **Improving Quality and Efficiency of Services:** Enhancing standards of care, clinical outcomes, and operational efficiency.

- **Strengthening Prevention Against Health Threats:** Promoting public health, reducing non-communicable diseases, and supporting long-term wellness.
- **Enhancing Traffic Safety:** Integrating health and safety goals by reducing injury-related morbidity and supporting safer urban living environments.

These pillars not only align with Vision 2030’s social and economic goals but also ensure that transformation efforts are cohesive, actionable, and sustainable across time.

“We operate based on several KPIs and pillars, with two main focuses: access to care and quality of life. All our projects are designed to align with

these pillars, emphasizing access to medication and the unification of healthcare management. To create a more unified approach, the Ministry of Health has introduced a cluster system that ensures consistency in patient care across hospitals and other healthcare facilities. Each cluster is anchored by a central medical city, with several hospitals and primary healthcare facilities beneath them. This structure ensures that patients within a cluster receive the same level of care, services, and outcomes.” **Dr. Hajer Almudaiheem**, Director of Drug Policy and Regulation - Deputyship of Therapeutic affairs, MoH, Saudi Arabia.



Program Highlights and System-Wide Impact

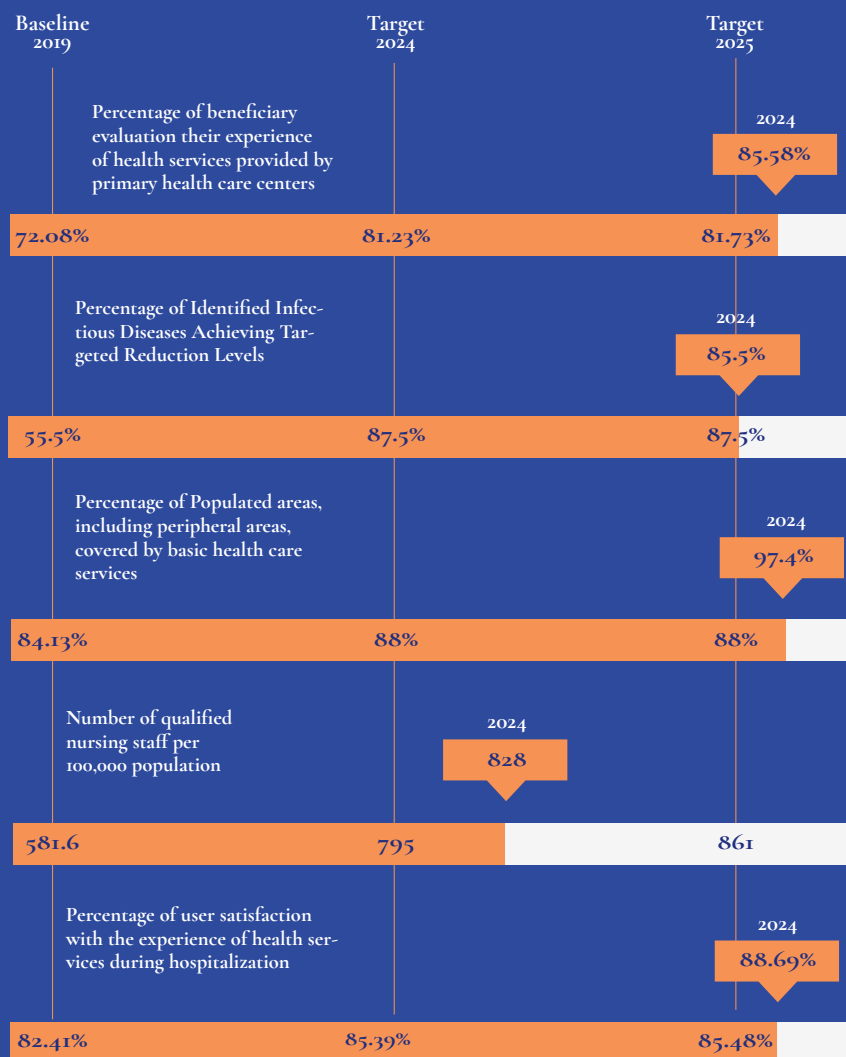
The HSTP is reshaping healthcare in Saudi Arabia through major reforms and innovation across several fronts:

- **Digital Transformation:** Investments in e-health and AI-powered tools are streamlining patient journeys and enabling smart

healthcare delivery. National platforms like **Sehhaty**, **Mawid**, and the **SEHA Virtual Hospital** reflect this progress.

- **Public-Private Partnerships and Financial Sustainability:** With a target to increase private sector contribution to **35% of healthcare spending by 2030**, the Kingdom is encouraging investment through PPPs, corporatization of public hospitals, and the creation of a **Health Holding Company** and a **National Health Insurance Center**.
- **Workforce Development:** Saudization efforts are expanding, with a focus on training and retaining skilled national healthcare professionals to meet rising demand.
- **Universal Health Coverage:** The Kingdom is progressing toward **100% health insurance coverage** for citizens and residents, ensuring financial protection and equitable access.
- **Patient-Centric Model of Care:** HSTP emphasizes a healthcare model that addresses the full spectrum of care—preventive, primary, secondary, and specialized—centered around individual and community needs.

Progress on Performance Indicators in 2024



Source: Health Sector Transformation Report 2024



Embracing the Transformation: Strengthening the Commitment to Saudi Arabia

“We have observed that many multinational companies are increasing their investments in various sectors, including pharmaceuticals, and are establishing Saudi Arabia as a regional hub. We have also set up our regional headquarters here, bringing in talent from across the globe. This shift has resulted in significant positive transformation, including an increase in both population and diversity.” Mohamed Mostafa, Vice President & General Manager Saudi Arabia, Egypt, Libya and Sudan at IQVIA

Saudi Arabia is quickly becoming a central player in the global healthcare landscape, attracting increased investment and attention from leading multinational companies. As the Kingdom accelerates its healthcare transformation and positions itself as a regional hub, major pharmaceutical and MedTech players are reaffirming their long-term commitment.

For companies like Pfizer, this transformation builds on decades of presence in the region. *“Pfizer Saudi Arabia dates back to the early 1960s, giving us a long legacy of serving patients in the region. However, the last four years have been transformative, not just in the number of patients we have reached but also in how we have evolved globally as a company. Pfizer has undergone a major strategic shift, and this new vision is having a direct impact on how we operate in Saudi Arabia, driving meaningful change and strengthening our commitment to the Kingdom’s healthcare goals and to delivering breakthroughs that change patients’ lives,”* states **Mohamed Fawzy**, Country President, Pfizer Saudi Arabia.



The momentum is not limited to pharmaceuticals. Medical technology firms are also scaling their local presence to align with the Kingdom’s evolving healthcare landscape. *“The Middle East, and particularly the Gulf region have developed a well-established healthcare infrastructure, strong healthcare spending, and solid market access capabilities. I am very much pleased with the progress we have made in the Middle East region in the last couple of years as we remain committed to improving lives across the region, ensuring we have a strong local representation, collaborating closely with local Health care Professionals, offering medical educational programs through the Olympus continuum, and introducing Olympus’s latest medical technologies to these markets. One of the most significant milestones has been the establishment of our new partnership in*

KSA with Gulf Medical, a leading player in Saudi Arabia’s healthcare sector. This transition marked an important step forward for Olympus and our stakeholders in the kingdom,” explains **Ronald Bouri**, Vice President, Managing Director at Olympus Medical Systems EMEA.



Abbott, another global leader, highlights its long-standing partnership and national contributions. *“For over 60 years, we have proudly contributed to Saudi Arabia’s healthcare sector, and we take immense pride in being a strategic healthcare partner to the Kingdom. We contribute to the development of the healthcare sector through a variety of national health programs and activities. Today, our team of over 400 people are working relentlessly to ensure that the people we serve have access to our trusted products and services.”* **Islam Jaber**, Regional Managing Director – Abbott’s core diagnostics business - Middle East Northeast Africa Region



Novo Nordisk is also scaling its impact through patient reach and innovation. *“We are proud to be the 2nd largest and one of the fastest growing multinational pharma companies in Saudi Arabia. We reached nearly 1 million patients with diabetes and obesity last year and our vision is to reach more than 3 million patients by 2030. With a strong pipeline of new treatments and innovations on the horizon, we’re focused on growing and contributing to the society in a sustainable way. Our strategy at Novo Nordisk in Saudi Arabia focuses on innovation, bringing solutions to the market urgently, and collaborating closely with stakeholders to make a long-term impact in this region,”* comments **Melvin D’Souza**, Corporate Vice President & General Manager, Novo Nordisk, Saudi Arabia.

Together, these multinational leaders are not only responding to Saudi Arabia’s healthcare vision—they are actively shaping it.

South Africa and Saudi Arabia: Building on 30 Years of Partnership

South Africa and Saudi Arabia have enjoyed more than three decades of close cooperation, built on trust, trade, and a shared vision for growth. The Saudi Arabia–South Africa Business Council (SASABC), created by Business Unity South Africa (BUSA) and the Saudi Chambers of Commerce, has played a key role in strengthening ties. Since the establishment of the Joint Economic Commission in 1995, the relationship has continued to gain momentum.

In recent years, trade between the two countries has accelerated. South Africa’s exports to Saudi Arabia grew from USD 6.6 billion in 2022 to USD 8.1 billion in 2023 — a year-on-year increase of almost 22 percent.

Speaking at a recent business forum, **Stavros Nicolaou**, Co-Chair of the South Africa–Saudi Arabia Business Council and Group Senior Executive at Aspen Pharma, highlighted the strong outlook for collaboration:



“The Saudi Arabia market presents enormous growth opportunities for South African companies looking to expand their businesses in the Gulf region, as shown by local companies that are slowly establishing a presence in that region.”

For South Africa, Saudi Arabia is not only a key market but also a valued partner. The growing presence of South African companies in the Gulf underlines a relationship that is set to deepen even further in the years ahead.



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Innovation First



Saudi Arabia's Vision 2030 has made healthcare access and innovation central pillars of its transformation journey.



Abed Sabra, General Manager at Roche Saudi Arabia states: *"At the start of Vision 2030, healthcare access in Saudi Arabia was at approximately 75%. Today, it stands at 96%, with a goal to reach 100% by 2030. This progress is remarkable, even globally, with Saudi Arabia now offering nearly universal access not only to primary care but also to advanced and innovative treatments. The country ranks among the top ten worldwide in terms of speed and accessibility to innovative healthcare solutions, placing it among top countries globally. This unprecedented accessibility metric has created new opportunities, drawing interest from global healthcare and pharmaceutical companies to participate in Saudi Arabia's transformation. For Roche, this environment has solidified our position as a leader in healthcare solutions, spanning diagnostics, pharmaceuticals, and data-driven healthcare innovations."*

As innovation continues to define the Kingdom's healthcare future, companies like Astellas are leveraging the supportive regulatory and investment environment. *"Astellas, as an organization, has ambitious growth in Saudi Arabia. As an innovative company, Astellas focuses on products driven by research and development, and partnerships. Saudi Arabia is an excellent example of a market where authorities are creating the right environment and capabilities to make new innovative medicines accessible to patients. This aligns perfectly with Astellas' mission to deliver cutting-edge treatments that provide added value to patients and the healthcare system,"* said **Khaled Belghoul, PhD**, General Manager KSA & UAE, Astellas.



Meanwhile, for Novartis, Saudi Arabia's commitment to rapid access has made it a strategic priority, especially given the company's focus on novel therapies:

"Novartis has placed Saudi Arabia among the 'wave one' countries for most of our innovative products. This ensures that Saudi patients have access to our latest advancements at the earliest opportunity. We have made substantial progress in two key platforms: cell and gene therapy and radioligand therapy. Novartis was the first to introduce cell and gene therapy products to Saudi Arabia. This required significant collaboration with key stakeholders, including the FDA, customs, the Ministry of Investment, and local institutions like King Faisal Specialist Hospital, the Ministry of Health, and the National Guard." **Ayman Al Mazloum**, Country President, Novartis Saudi Arabia. This example showcases the Kingdom's clear focus on the future, and how Saudi Arabia is rapidly becoming a model for modern, value-based healthcare on a global stage.



Danish Pharma giant Lundbeck observed how *"The country has taken two significant steps to foster innovation. First, it has revolutionized its product registration process and is now among the fastest in the region. Products that once required 2-3 years for approval can now receive the green light within six months of their launch in the U.S. or Europe. Second, Saudi Arabia has enhanced patient access to medication by supporting the private insurance market and fortifying government hospital systems. These advancements have paved the way for innovative treatments to enter the market seamlessly."*

Dr. Hajer Al-Mudaiheem



Ministry of Health Saudi Arabia

Director of Drug Policy and Regulation - Deputyship of Therapeutic Affairs

EF: Could you elaborate on the role you are in, your background, and your current priorities?

HA: I am a clinical pharmacist by background. I oversee the drug policy and regulation department at the Ministry of Health under the leadership of Therapeutic Affairs. My role focuses on ensuring adherence to therapeutic guidelines across all MOH hospitals. The Ministry of Health is the largest healthcare provider in bed capacity, hospitals, medical cities, and primary healthcare facilities. We monitor approximately 300 hospitals and 1,200 primary healthcare centers to ensure compliance with therapeutic guidelines. A major part of our work involves formulary management, which provides the availability of medications for both primary healthcare and hospital use.

We established a Drug Information Center with a national call center under the Drug Policy and Regulation Department. This call center operates under the Ministry of Health and is accessible via the 937 hotline. It provides 24/7 public support, answering medication-related queries and addressing hospital poisoning cases. The center has been operational for over seven years. I was privileged to set up more than 16 Drug Information Centers across the Kingdom and train pharmacists to manage calls effectively under the 937 supervision. Although the 937 center now operates as a separate entity with its regulations and department, I continue to support them by providing training, referencing resources, and helping pharmacists develop their expertise in drug information.

EF: How are your efforts supporting the Vision 2030 objectives and the targets set to modernize Saudi Arabia's healthcare sector?

HA: One of the main objectives of Vision 2030 is to increase the life expectancy of citizens to over 80 years. Achieving this goal presents challenges related to medication access, quality of care, and overall quality of life. We operate based on several KPIs and pillars, with two main focuses: access to care and quality of life. All our projects are designed to align with these pillars, emphasizing access to medication and the unification of healthcare management. To create a more unified approach, the Ministry of Health has introduced a cluster system that ensures consistency in patient care across hospitals and other healthcare facilities. For instance, in Riyadh, there are three main clusters organized geographically. Each cluster is anchored by a central medical city, with several hospitals and primary healthcare facilities beneath them. This structure ensures that patients within a cluster receive the same level of care, services, and outcomes. It also standardizes therapeutic management pathways, ensuring a unified healthcare system.

EF: As the director of drug policy and regulation, what opportunities do you identify for harmonizing drug policies with global standards to address local needs?

HA: Our healthcare system has significant potential for improvement through enhanced integration. By developing a centralized platform for disease burden data and prioritization tools, we can streamline our approach to therapeutic areas. This presents an exciting opportunity to harmonize our diverse Health Information Systems (HIS), fostering better coordination and efficiency in patient care and public health management. One of our first steps is improving how we manage formularies, which are crucial in patient care.

We have also an opportunity to optimize our financial resources and enhance our pharmaceutical procurement strategy. While we currently operate on an annual budget, we can explore innovative funding models and partnerships to keep pace with rising medication prices and cutting-edge innovations. By proactively addressing this challenge, we can create a more flexible and responsive system that better accommodates breakthrough medications, new interventions, and emerging drug pipelines. To address this, we first established a baseline to understand the cost-effectiveness threshold for the Kingdom of

Saudi Arabia, particularly within the Ministry of Health. This allows us to determine which medications or classes are financially viable within our budget. Last year, we also published a groundbreaking study, the first in the region, on the utilities of Saudi Arabia. This provides a foundation for us to evaluate if the interventions are cost-effective. They reflect our commitment to improving financial sustainability while maintaining high-quality patient care.

The second challenge we face is the rising diagnosis of disease areas like rare diseases, especially with the new pharmaceutical breakthroughs emerging. Having a comprehensive screening program for rare diseases in Saudi Arabia would require us to identify patients and provide treatment, but most rare diseases currently have limited or no proven therapeutic interventions. Moreover, many medications for rare diseases are prohibitively expensive and fall outside the published cost-effectiveness thresholds for chronic disease treatments. We developed a Multi-Criteria Decision Analysis (MCDA) report focusing on three key areas to address this. First, it helps us prioritize diseases from potential health challenges. Second, it guides us in embracing value-based healthcare, enabling negotiations beyond just price. Price negotiations are managed nationally across all governmental sectors, but value-based agreements allow us to work directly with pharmaceutical companies on performance and outcomes. We establish agreements based on specific outcomes for medications with uncertain effectiveness or limited data in our population as high-cost treatments. These agreements often involve setting measurable timelines and tracking patient progress. Treatment continuation is decided based on these outcomes, ensuring financial resources are preserved for new patients or emerging interventions.

We manage over 20 value-based programs or agreements, including pay-for-performance and outcome-based models. We have developed multiple electronic registries linked to patient diagnoses, therapy monitoring, and other management activities. This registry provides annual reports for the Ministry of Health, and the pharmaceutical industry is also used to facilitate rebates. We aim to improve access to breakthrough medications while leveraging these strategies to ensure cost-effectiveness and sustainable healthcare management.

We are working on establishing a Rare Diseases Center of Excellence under the Ministry of Health. This initiative aims to unify the management of rare diseases across various healthcare sectors in Saudi Arabia. Rare disease management requires a national-level approach to ensure equity and equality in access to care. To achieve this, standardized guidelines and eligibility criteria are being developed to allow patients from different sectors access to hospitals and treatments that may not be available in their primary healthcare facilities. The Ministry of Health is working to identify rare diseases, capture data within an electronic platform, and study each disease using specific parameters. One of the pressing challenges currently being addressed is the limited capacity for clinical trials within the Ministry of Health. As the largest healthcare payer and having access to a vast pool of patients and physicians across multiple specialties, our clinical trial infrastructure has the potential of being one of the most robust ones.

Clinical trials have multiple benefits. These benefits include gaining valuable expertise, providing medications free of charge during trials, and exposing physicians to international standards through collaboration with global committees. The Ministry of Health focuses on establishing Clinical Trial Units (CTUs) and improving infrastructure to increase participation in clinical trials, particularly in therapeutic areas like rare diseases. These efforts align and emphasize the expansion of clinical trials that were set forth through a strategic vision by His Highness Prince Mohammed. A critical player in this effort is the Saudi Food and Drug Authority (SFDA), which oversees medication registration in Saudi Arabia. Under the new vision, the SFDA has introduced the Breakthrough Medication Designation process. The Breakthrough Medication

Designation allows first-in-class medications not yet registered elsewhere to be approved in Saudi Arabia without being tied to lengthy price negotiations. Healthcare sectors can directly engage with pharmaceutical companies to secure patient access to these groundbreaking treatments. To address drug policy and regulation challenges, particularly for rare diseases and clinical trials, the Ministry of Health is taking bold steps by improving infrastructure, leveraging partnerships with SFDA, and adopting innovative approaches.

EF: What initiatives are taking place in Saudi Arabia to increase awareness?

HA: Raising awareness is a key focus area, and the Ministry of Health in Saudi Arabia is investing heavily in public-private partnerships to achieve this goal. These partnerships involve the government, scientific societies within Saudi Arabia, and the pharmaceutical industry, all working collaboratively to address awareness at both the patient and healthcare professional levels. This collaborative model is also utilized when drafting national guidelines to ensure they are comprehensive and inclusive of all key stakeholders. Recent examples of such collaborations include partnerships with Takeda, the Saudi Society of Clinical Pharmacy, the Saudi Gastroenterology Society, and the Ministry of Health. Similarly, other partnerships have focused on areas like dermatology through the Saudi Society of Dermatology and obesity, a pressing health concern in Saudi Arabia, with initiatives targeting surgical and pharmacological interventions. Collaborations have also extended to fields like neuroscience, addressing conditions like multiple sclerosis and rare diseases like spinal muscular atrophy (SMA) through the Saudi Pediatric Neurology Society.

The mindset regarding partnerships with the pharmaceutical industry has shifted significantly over the last decade. The current approach emphasizes the mutual benefits of these partnerships. The pharma industry is now a valuable partner in fostering international collaboration with hospitals, universities, and healthcare projects. These collaborations have allowed us to understand better why certain initiatives succeed internationally but face challenges locally. Thereby paving the way for knowledge exchange and growth.

Additionally, Saudi Arabia is leveraging these partnerships to enhance its presence in scientific publications and international benchmarking. The country is exchanging knowledge and building bridges between local and international scientific communities by collaborating on research and publications. This has opened dialogues with global scientists and institutions, promoting the exchange of expertise and fostering progress in healthcare beyond national boundaries. These efforts underscore Saudi Arabia's commitment to aligning its healthcare strategies with global best practices while addressing local health challenges effectively.

EF: In the future, when you look back at these times, what would you want to be most proud of?

HA: Saudi Arabia has achieved a groundbreaking milestone with its national spinal muscular atrophy (SMA) program, the first of its kind globally. The Kingdom has also led the way in HIV treatment, being the first to implement three types of interventions: interfacial, oral, and gene therapy. These treatments are entirely funded by the Ministry of Health, ensuring coverage for the entire nation, and have produced outstanding patient outcomes. To support these initiatives, the country has increased the number of certified centers for treatment and follow-up. The SMA program, running successfully for over six years, integrates a comprehensive, multidisciplinary approach to patient care. In addition to providing medications, the program includes allied services such as respiratory care, nutrition counseling, and physiotherapy. These services are critical for enhancing adherence to treatment and physiotherapy regimens. A network of clinics has been established to monitor patients effectively, emphasizing patient-reported outcomes to improve the program continuously.

This initiative has also significantly focused on genetic counseling to raise awareness about SMA and other genetic diseases like sickle cell disease. The Kingdom's progress in shaping policies and raising awareness has resulted in approximately 60-70% adherence to new guidelines, which aims to lessen the impact of these diseases. Saudi Arabia's commitment to holistic patient care and innovative treatments demonstrates a pioneering effort to address genetic and chronic diseases nationally.

EF: Do you have any final words?

HA: The success of these initiatives in Saudi Arabia can only be attributed to the visionary leadership and strong support from the Ministry of Health (MOH). The leadership's unwavering belief in healthcare teams and their ability to execute these groundbreaking programs plays a pivotal role in the success of these projects. With clear direction and backing, these initiatives are not only achievable but are making a profound impact on patient care.

“ The combination of visionary leadership and empowered healthcare professionals is a driving force behind the country's advancements in healthcare and patient outcomes. ”

Prof. Fars Alanazi

Saudi National Institute of Health
CEO



EF: Could you provide an overview of the establishment, core responsibilities, and main objectives of the Saudi National Institute of Health (Saudi NIH)?

FA: The official establishment of the Saudi National Institute of Health (Saudi NIH) by royal decree, issued by the Council of Ministers, took place in August 2023. Before that, the Saudi NIH existed as an initiative within the Health Sector Transformation Program, which itself is part of the broader Saudi Vision 2030.

The Saudi NIH is responsible for overseeing translational research and clinical trials in the Kingdom. It was established with four key objectives:

The first objective is to contribute to improving health, well-being, and quality of life in the community.

The second objective is to fund translational research and clinical trials while ensuring their quality and efficiency. This gives the Saudi NIH a role similar to other national health research funding agencies.

The third objective is to ensure that the outcomes of research and clinical trials are translated into tangible health and economic benefits. This is an area where many funding agencies, especially in the health sector, have struggled. Scientific results alone do not help patients or health systems unless they are implemented.

The fourth objective is to unify efforts of authorities and research centers to produce high-quality scientific outcomes that directly contribute to solving national health issues.

EF: How can the Saudi NIH leverage its resources and knowledge translation tools to ensure that scientific discoveries, effectively inform public health strategies?

FA: Taking diabetes type 1 as an example, where it is widespread in Saudi Arabia, it is important to understand the underlying risk factors requires targeted research. These are the types of questions addressed by translational research, which focuses on moving discoveries from the laboratory to clinical settings and then into everyday medical practice.

To make a real difference, we must begin with clear national priorities. These priorities will be translated into competitive grant opportunities. Through this competitive bidding process, research contracts will be awarded to researchers, research groups, and research centers that can address the key knowledge gaps and health challenges we have identified.

Once the research cycle is completed, the role of the Saudi NIH is to continue advancing this knowledge. Scientific findings must be acted on.

The Saudi NIH has the tools to move these discoveries from the research bench into practice. One of those tools is the Knowledge Translation Department, which is responsible for converting discoveries into usable knowledge. The process begins with generating new knowledge—what we call knowledge creation—then moves into mobilizing and implementing that knowledge within the health system.

We are working within a broader ecosystem to adapt scientific evidence into real-world applications. Take colon cancer, for example. If we find that certain populations are at higher risk of developing it at an earlier age, that insight must be shared with public health authorities. It should then influence practice guidelines in hospitals. If someone belongs to a high-risk population, screening through a colonoscopy should begin earlier, say at age 30 instead of 50 for the population of high-risk factors.

We also need to push insurance providers to cover such early diagnostic procedures and ensure that practitioners are well-informed and equipped to explain

this to patients. Practitioners must also be able to inform one another about the risk factors that demand a shift in approach.

In short, transforming research results into real health and economic benefits is important. Economic benefits can come in the form of new pharmaceutical products, medical devices, or vaccines. To support this, we have established a separate department responsible for mentoring, facilitating, and enabling inventions. In the product development domain, we are not focused on publishing preclinical studies in journals like Nature or Science. Instead, we aim to carry those findings into drug development, including phase one trials.

We also have specialized entities and functions within the Saudi NIH to manage this process. For example, we have a dedicated Innovation Department and clearly defined roles within Quality and Business Innovation Services (QBIS) to monitor progress. Our goal is to ensure that after five years of focused research programs, for example in cancer, we can demonstrate tangible outcomes.

EF: Can you elaborate on the main objectives and achievements of the Saudi NIH in unifying research efforts and accelerating clinical trials, and how these initiatives have impacted the national research and development ecosystem?

FA: A core objective of the Saudi NIH is to contribute to unifying the efforts of various authorities and research centers. Alignment across institutions is essential to achieving our national goals. Our job is to address the challenges we find within the research ecosystem. For example, even if a research step is defined, the necessary data may not be available, and we need to work on improving data accessibility.

We also need to ensure that we are reaching the right populations and conducting multi-site, multi-center studies. Last year, we launched an initiative called the Clinical Trial Expediting Initiative, aimed at reducing the approval time for clinical trials by streamlining regulatory processes and prioritizing studies of national importance.

As part of this initiative, we aligned our efforts with the Saudi FDA and also collaborated with the leading clinical trial centers in Saudi Arabia that are responsible for over 90 percent of the country's clinical trial activity. We worked with these hospitals to ensure that clinical trials could be started with an attractive timeline. Additionally, under this initiative, the clinical trial ecosystem is committed for the success of having a reasonable approval time. Research and development require an enabling environment, and the Saudi NIH is equipped to provide that. This level of responsiveness and coordination reflects the core purpose behind establishing the Saudi NIH.

EF: Could you elaborate on Saudi Arabia's established foundation and current capacity in health research at a global level?

FA: Saudi Arabia is not new to health research. We already have strong foundations in place. In 2024 alone, we published nearly 17,000 scientific articles in the health sector.

At the Geneva International Exhibition of Inventions 2025, 174 Saudi-led inventions were showcased, many receiving gold and silver medals. Dr. Saad Al-Anzi from Majmaah University, won the Grand Prize in Geneva for developing a medical device. Over 47% of Saudi Arabia's scientific publications are in the health sector. That is a strategic signal. Our scientific and research energy is concentrated exactly where it is needed most.

We also have the capacity. Saudi Arabia has over 34,000 researchers, and nearly 20,000 are working in health. Our health workforce includes highly educated physicians, pharmacists, and academics. We have advanced infrastructure. What we lacked was a business model to convert this capability into outcomes. That is exactly what we are now building.

Saudi Arabia is aligning its health research with national initiatives like the Saudi Biotechnology Strategy and the National Industry Strategy. Within these, there are specific actions focused on pharma and medical devices. The Saudi NIH is not a traditional funding agency. We define clear outcomes from the beginning.

EF: Could you elaborate on your funding model, how it is different and what are the benefits?

FA: Our funding model, titled “Translating from Bench to Bedside,” is structured around three phases: proof of concept, preclinical studies, and clinical trials. If a research project shows success in proof of concept, we fund it through the preclinical stage and then into phase one trials. We do not abandon researchers between stages. That is the business model we are implementing. The Saudi NIH becomes the research and development engine of the Kingdom.

Previously, a researcher might complete proof of concept and then get stuck. There would be no funding or support. Today, we offer a structured path. If a startup from abroad already has a promising product ready for preclinical or phase one trials, we can bring them in, fund them, and accelerate their progress. We are planning to reduce the timeline of early stage of development from 10 years to 5 years. That is a significant shift.

Unlike conventional agencies that measure success through publications in journals, we evaluate based on progress toward implementation. We are focused on health impact and economic value, and we believe prestige will come as a consequence. The only way to achieve that is through a rigorous, outcome-driven, and strategically aligned business model. This is what sets us apart.

Our ambition is not limited to developing molecules or vaccines. We are equally focused on generating actionable knowledge. This knowledge will not only benefit Saudi Arabia, but we aim for it to be recognized and adopted globally.

EF: How do you ensure that the research being conducted addresses both national health priorities and broader global scientific challenges?

FA: As human beings, we are more than 99% genetically similar. However, there are differences in how we metabolize substances. For example, individuals of Japanese descent often metabolize drugs differently compared to other populations, such as those in the Middle East or Europe.

Despite these differences, common conditions such as hypertension, cancer, and cardiovascular diseases are shared globally. However, the underlying risk factors vary significantly. In North America, for instance, the primary contributors to cardiovascular disease are quite different from those affecting people in Saudi Arabia.

When we look at chronic kidney disease, the causes also differ. In the United States, alcohol consumption might be one of the leading risk factors. In contrast, in Saudi Arabia, not drinking enough water and specific microbial exposure could be significant contributors. The types and sources of microbial contamination also differ, shaping disease patterns in unique ways.

We cannot simply copy global medical guidelines and apply them directly. Instead, we must adapt the science to our local context. At the same time, we should stay open to global findings that may be relevant across different populations. It is about customizing knowledge, not rejecting it.

Generating data and evidence from within our region, empowers us to contribute to global science while developing tailored health solutions for our people.

EF: Is there any final message or perspective you would like to offer to the global audience?

“Saudi Arabia is not only rising as an economic powerhouse, but also becoming a true incubator for health innovation. Our ambition is to build and nurture one of the most competitive and forward-thinking healthcare ecosystems in the world. We are not just participating in the global conversation, we are helping shape it.”

Mohamed Mostafa



IQVIA

Vice President & General Manager Saudi Arabia, Egypt, Libya and Sudan

EF: Could you elaborate on the key priorities you have observed while working for IQVIA in Saudi Arabia?

MM: I have been with IQVIA since 2010. The healthcare sector has evolved remarkably, particularly in digital transformation, regulatory advancements, and overall ecosystem development. At IQVIA Saudi, we work closely with life sciences companies, including pharmaceutical, medical device, and consumer health clients, as well as Government. Our role involves supporting strategic initiatives, digitizing hospitals, and enhancing healthcare delivery to ensure optimal care for every individual in the country. Additionally, we contribute to population health management efforts, optimizing healthcare supply chain, leveraging AI and technology to transform healthcare initiatives.

As part of Saudi Vision 2030's goals to enhance quality of life and disease prevention, we have made investments in Saudi Arabia, including establishing an entity dedicated to clinical trials. Clinical research is a key focus area, and we are working on digitizing the process to expand patient access to trials. This not only encourages investment and job creation but also facilitates early access to innovative medicines—particularly for rare diseases, oncology, and other critical areas—ultimately saving lives.

EF: IQVIA recently announced a partnership with NVIDIA for workflows and clinical research. Given that Saudi Arabia is also embracing innovation in healthcare, what are your expectations for this partnership and its potential impact on the market?

MM: From a healthcare perspective, the collaboration between IQVIA and NVIDIA is highly valuable, as it will enable new levels of agentic automation of complex and time-consuming workflows across the therapeutic life cycle. A significant challenge in healthcare is that most data is unstructured, scattered, and not centralized.

“ At IQVIA, our role is to support governments and life sciences clients in transforming this data into actionable insights, enabling informed decision-making. IQVIA has been leading in the responsible use of AI, ensuring that its AI-powered capabilities are grounded in privacy, regulatory compliance, and patient safety. ”

EF: Could you elaborate on the market dynamics in Saudi Arabia and what unique factors make Saudi Arabia stand out?

MM: Saudi Arabia's digital and healthcare infrastructure is highly robust, which plays a crucial role in delivering healthcare services to patients across the country. There is a strong emphasis on disease prevention and increasing life expectancy, with a large proportion of the population being young. The government is focused on creating value-based and evidence-based approaches to treat chronic patients, with prevention efforts taking priority. There is increased investment from government and private sector in AI, digital and evidence based medicine.

EF: Saudi Arabia is the second fastest-growing market in the Middle East. What factors are driving this growth, and where do you see opportunities for Saudi Arabia to capitalize on and become the fastest-growing market?

MM: Saudi Arabia's population is growing, which is a key driver of its market expansion. In addition to the population increase, the country is seeing a rise in regional headquarters and investments, as well as growing interest in non-oil sectors such as tourism, sports, and entertainment. These factors have led to a growing population and a higher number of visitors and residents, making Saudi Arabia an attractive hub for the region.

We have observed that many multinational companies are increasing their investments in various sectors, including pharmaceuticals, and are establishing Saudi Arabia as a regional hub. We have also set up our regional headquarters here, bringing in talent from across the globe. This shift has resulted in significant positive transformation, including an increase in both population and diversity.

In clinical research, we are collaborating with the government and one of our life sciences clients to develop a certified six-month clinical research associate training program. The goal is to equip newly graduated pharmacists, physicians, and practicing doctors with the necessary skills to become future clinical research associates. This initiative allows us to transfer our clinical research expertise and enhance the capabilities of local professionals, making them valuable resources for hospitals, pharmaceutical companies, and other stakeholders.

Liz Clark

US Chamber of Commerce
Former Director, Saudi Arabia



EF: What are your current priorities in terms of investment into Saudi?

LC: The U.S. Chamber of Commerce is best known domestically for its extensive lobbying and advocacy efforts with the U.S. government, including the President, the White House, Congress, and various federal agencies. We serve as the primary representative of American businesses, advocating on their behalf. With a network encompassing over three million businesses, we are the largest business advocacy organization in the world, dedicated to supporting U.S. business interests. Beyond our domestic work, the Chamber has a significant international presence. We engage with over 80 countries, ensuring that wherever U.S. businesses operate, they receive support in navigating the global market. While U.S. business remains strongest domestically, a key aspect of our role is promoting American business practices, products, research, and innovation worldwide.

To achieve this, we have established bilateral business programs in multiple countries, representing U.S. companies investing abroad. Our goal is to foster a favorable business environment for foreign investment while contributing to economic growth in host countries and strengthening bilateral economic relationships with the United States.

EF: What opportunities and challenges do you identify for 2025?

LC: Our top priority is to support the expansion of U.S. investment and corporate presence in Saudi Arabia. When visiting the Kingdom, it is clear that U.S. companies remain the gold standard. While there are discussions about diversification, Saudi decision-makers continue to prioritize U.S. businesses, products, and business culture.

“The strength of U.S. companies lies in their approach to research, innovation, and life sciences, which serves as a benchmark for developing Saudi Arabia’s healthcare ecosystem. Our role is to enhance dialogue, ensuring that Saudi regulators and policymakers recognize what is working, how effective policies are driving growth, and where adjustments can be made to further improve the investment climate.”

High level Saudi visits present significant opportunities to strengthen these dialogues and address challenges that companies are facing. These are common global issues, such as increasing local presence and boosting foreign direct investment. There are also mandates for reinvestment and pricing concerns, particularly for pharmaceutical and medtech companies, as well as intellectual property rights—issues that persist worldwide.

EF: What are your expectations for these bilateral relations, and what outco-

mes can we anticipate? As someone at the forefront representing the business community, how do you see this translating into more deals in the future?

LC: Saudi Arabia has significantly improved its regulatory environment, making it easier to do business and relocate personnel. However, consistency in policy is crucial. Sudden regulatory changes or unexpected new requirements, such as high reinvestment mandates, can create uncertainty. The regional headquarters (RHQ) policy is a good example; while it has ultimately been successful in attracting companies, its initial rollout posed challenges.

Large corporations often have complex bureaucratic processes, making it difficult to adapt quickly to new requirements, and rapid changes like this can pose significant challenges for businesses navigating regulatory landscapes. The motivation behind the RHQ policy was understandable—it aimed to bring more companies into the Kingdom. Initially, there was some uncertainty as companies were unsure how to respond. However, to their credit, Saudi authorities addressed many of these concerns, and now more than 600 companies have officially moved their regional headquarters to the Kingdom.

This shows that positive progress can be made, but sudden policy shifts can create unnecessary challenges. The key is to avoid overnight announcements that require immediate reactions. Instead, incorporating private sector input from the outset, allowing time for feedback and smooth implementation, leads to more effective policy development. A well-structured process not only improves regulatory transitions but also strengthens the overall investment narrative, making the region more attractive to businesses.

EF: As an advocate for the importance of investing in healthcare, why do you believe that every dollar invested in this sector yields greater returns than in other industries?

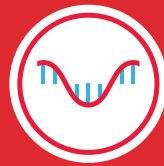
LC: One clear example of the impact of healthcare investment is the significant contributions U.S. companies have already made to the sector. We conducted a study last year analyzing the economic contribution of U.S. healthcare companies to Saudi Arabia up to 2024.

The findings revealed that over the past decade, these companies have contributed approximately \$13 billion. While healthcare companies are typically cautious about disclosing long-term projections, it is reasonable to expect that figure to double or even triple over the next ten years. This investment has already led to job creation, increased local capacity, and the development of domestic capabilities to manufacture and research healthcare products, ultimately improving access to life-saving treatments.

Saudi Arabia, as the largest economy in the region with a population of over 30 million people, has strong demand for these innovations. Many healthcare companies, particularly in specialized areas such as orphan drugs and high-precision medical technology, often operate with a single global manufacturing site. The fact that some are now considering shifting part of that production to Saudi Arabia reflects the potential for both business growth and economic development in the region.

Healthcare investment not only drives foreign direct investment (FDI) but also strengthens localization efforts, positioning Saudi Arabia as a key player in global healthcare and life sciences. Beyond economic gains, this investment fosters workforce development through job training and infrastructure expansion, solidifying the country’s place on the world map of healthcare innovation.

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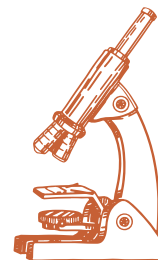
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Chapter 2

Research and Innovation:
Accelerating Arabian Impact in Pharma

Advancing the Kingdom's Research Agenda



Saudi Arabia is entering a new era of health innovation through a focused national research agenda, supported by robust infrastructure, coordinated efforts, and global collaboration. A cornerstone of this agenda is the establishment of the Saudi National Institute of Health (Saudi NIH), founded by royal decree in August 2023. This institution signals the Kingdom's strategic shift toward strengthening translational research and clinical trials as a core component of Vision 2030.

As the central body overseeing health research, the Saudi NIH is enhancing the quality, coordination, and impact of scientific efforts nationwide. It provides targeted funding, drives implementation of research findings into health and economic policies, and unifies national research efforts around pressing health challenges. Ultimately, this positions Saudi Arabia as a regional hub for innovation-driven healthcare research, with strong momentum in rare diseases and value-based care.



"To make a real difference, we must begin with clear national priorities," notes **Prof. Fars Alanazi**, CEO of the Saudi NIH. He explains how, through competitive grant programs, the Saudi NIH funds research aligned with those priorities—such as tackling high-prevalence conditions like type 1 diabetes. But the institute's role extends beyond funding: it ensures that research is translated into practice and policy.

To this end, dedicated units like the **Knowledge Translation Department** and **Innovation Department** actively transform scientific findings into public health guidelines, insurance frameworks, and clinical protocols—in areas such as early colon cancer screening. Or as Prof. Alanazi puts it: *"We are transforming research results into real health and economic benefits."*



Strengthening Health Technology Assessment

Beyond traditional research, Saudi Arabia is integrating Health Technology Assessment (HTA) into its transformation. The move toward value-based care not only supports better health outcomes but also attracts international interest and investment. *"From a healthcare perspective, Saudi Arabia is on a trajectory to become an \$11 billion market, fueled by an ambitious transformation agenda. The government's focus on value-based healthcare and HTA models further*



enhances the country's attractiveness as a strategic market. Moreover, Saudi Arabia's vision to establish itself as a leading medical hub in the region aligns seamlessly with BMS's mission to deliver innovative medicines to patients." comments **Osama Braiwish**, General Manager, Saudi Arabia and Gulf Countries, Bristol Myers Squibb



Enhancing Clinical Trials

Clinical trials are now a strategic priority, with the government and private sector both investing to expand patient access and improve research capabilities.

"As part of Saudi Vision 2030's goals to enhance quality of life and disease prevention, we have made investments in Saudi Arabia, including establishing an entity dedicated to clinical trials. Clinical research is a key focus area, and we are working on digitizing the process to expand patient access to trials. This not only encourages investment and job creation but also facilitates early access to innovative medicines—particularly for rare diseases, oncology, and other critical areas—ultimately saving lives," shares **Mohamed Mostafa**, Vice President & General Manager at IQVIA.



The Kingdom's infrastructure is now ready for advanced research. Companies like Takeda are already capitalizing on the progress.

"Saudi Arabia has made significant upgrades in terms of infrastructure and capabilities, and now the country is well-prepared for phase two and phase three studies. This progress has already enabled us to initiate multiple research projects. At the moment, we have around five research projects running in Saudi Arabia, and we are aiming to further expand and elevate the quality of these studies. We are closely collaborating with local and global societies in our therapy areas to strengthen our partnerships and support clinical research both regionally and internationally," explains **Khaled Sary**, General Manager of Takeda's West Gulf Cluster.



Such initiatives thrive not in isolation but through multi-stakeholder collaboration. The Kingdom is fostering a more connected research ecosystem, as emphasized by **Abed Sabra**, General Manager at Roche Saudi Arabia: *"Locally, we also work closely with other pharma companies, for example, we worked with major pharmaceutical companies like AstraZeneca, J&J, and Lilly on clinical research initiatives. By bringing in expertise where needed—especially in areas beyond our own in pharma and diagnostics, like digital health and AI—these partnerships allow us to achieve more together than we could individually. This collaborative, multi-sector approach is key to driving innovation and impactful solutions throughout the healthcare landscape."*



Putting Saudi Research on the Global Map

Saudi Arabia's vision is not only national—it's global. Through partnerships and scientific exchange, the Kingdom is embedding its healthcare innovation agenda into international networks.

"The pharma industry is now a valuable partner in fostering international collaboration with hospitals, universities, and healthcare projects—paving the way for knowledge exchange and growth. Saudi Arabia is exchanging knowledge and building bridges between local and international scientific



communities by collaborating on research and publications. This has opened dialogues with global scientists and institutions, promoting the exchange of expertise and fostering progress in healthcare beyond national boundaries. These efforts underscore Saudi Arabia's commitment to aligning its healthcare strategies with global best practices while addressing local health challenges effectively." **Dr. Hajer Almu-daiheem**, Director of Drug Policy and Regulation - Deputyship of Therapeutic affairs, MoH, Saudi Arabia.

Such dialogue is critical for shaping policy and attracting innovation. International stakeholders like the U.S. Chamber of Commerce see Saudi Arabia's research landscape as evolving in the right direction.

"The strength of U.S. companies lies in their approach to research, innovation, and life sciences, which serves as a benchmark for developing Saudi Arabia's healthcare ecosystem. Our role is to enhance dialogue, ensuring that Saudi regulators and policymakers recognize what is working,

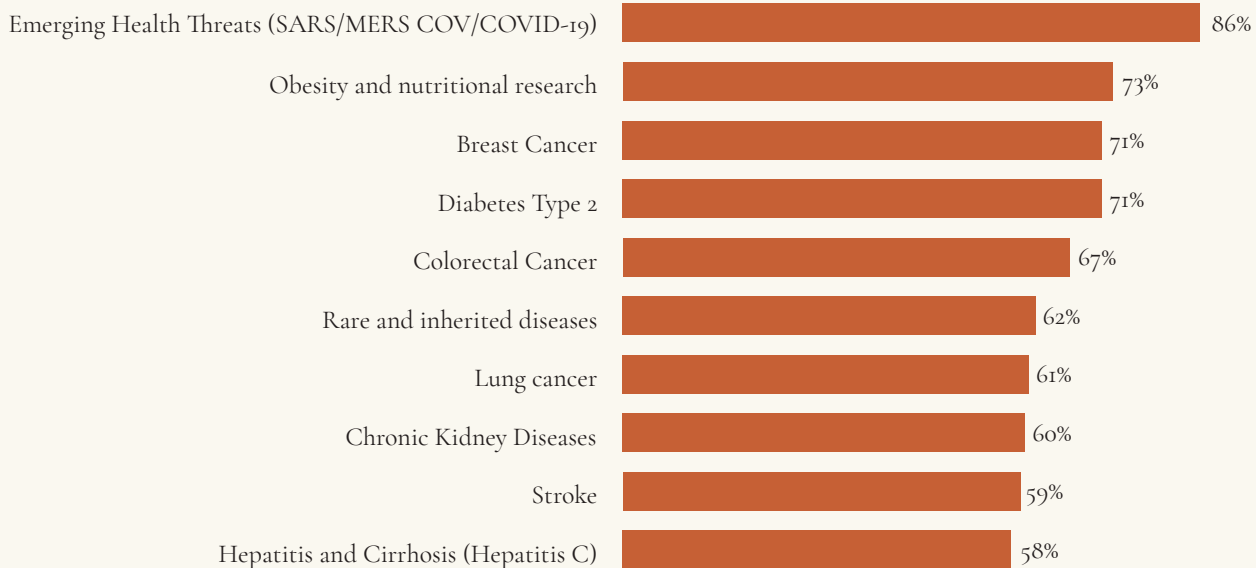
how effective policies are driving growth, and where adjustments can be made to further improve the investment climate," states **Liz Clark** the US Chamber of Commerce Former Director.



Tarek Farahat, Head of Commercial & Alliances for Middle East & Eastern Europe, Moderna, meanwhile highlights the opportunity the advances open in the biotech space and illustrates with examples "Vision 2030 aims to position Saudi Arabia as a global hub for biotech and advanced healthcare. The Ministry of Health's national strategy for elderly health aligns closely with our goals. We see opportunities to collaborate on vaccination campaigns for the elderly and introduce innovations like respiratory vaccines, including RSV, influenza, and the mRNA 1083 combination vaccine." Tarek Farahat's statement underscores a larger truth: Saudi Arabia is not only investing in its national health research agenda—it is deeply committed to taking a global leadership role in the development and adoption of the healthcare solutions of the future.



DISEASES THAT ARE A STRATEGIC PRIORITY FOR CLINICAL AND ACADEMIC INSTITUTIONS



Source: Saudi NIH

Thriving Therapeutic Areas



As part of its Vision 2030 transformation, Saudi Arabia is prioritizing targeted investment and collaborative innovation in therapeutic areas that reflect the country's most pressing health needs. From chronic diseases to advanced diagnostics, mental health, and antimicrobial resistance, the Kingdom is laying the groundwork for a healthier future—one strategic area at a time.



Expanding Core Areas of Growth



"In Saudi Arabia, we recognize many growth opportunities, particularly in gastroenterology, inflammation, oncology, and immunology, including blood plasma products. These areas are our primary growth drivers in the region. Additionally, we see significant potential in neurology and vaccines, and as the timing and supply align, we are eager to expand our presence in these areas." **Khaled Sary**, General Manager of Takeda's West Gulf Cluster



Diabetes and Obesity

"In Saudi Arabia, obesity and/or overweight affects every other adult and diabetes touches one in every six. That means, we have an opportunity to make a difference in lives of nearly every household! For us, that's where

we can make a real change in Saudi Arabia; a chance to improve lives. Saudi Arabia represents both a growth opportunity and a responsibility. We must be trusted and honest partners when reaching out to a diverse set of stakeholders and patients." **Melvin D'Souza**, Corporate Vice President & General Manager, Novo Nordisk, Saudi Arabia



Gastroenterology

"In Saudi Arabia, we see strong growth potential in several key therapeutic areas—particularly gastroenterology, including endotherapy, as well as respiratory care and urology. These are the segments where we play a leading role globally, supported by a strong portfolio and advanced technology. Soon we will be introducing our latest innovation, the new intelligent endoscopy ecosystem designed to aid the early diagnosis of lower and upper gastrointestinal (GI) diseases, including colorectal cancer, ulcerative colitis and dysplasia within Barrett's esophagus." **Ronald Boueri**, Vice President, Managing Director at Olympus Medical Systems EMEA





Oncology

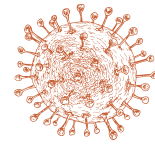
"Cancer remains a critical global challenge, and BMS continues to lead in oncology, particularly in immunotherapy, by researching, discovering and developing innovative therapies. Early diagnosis can be life changing. This requires the healthcare systems to prioritize long-term patient well-being rather than short-term cost containment. Saudi Arabia's healthcare transformation is an excellent example of this approach in action demonstrating how investments in infrastructure, innovation, and partnerships can drive meaningful change." **Osama Braiwish**, General Manager, Saudi Arabia and Gulf Countries, Bristol Myers Squibb



"In oncology, Gilead is committed to advancing cutting-edge treatments for solid tumors while bringing CAR T therapies to patients with blood cancers. The impact of these innovations is clear, as they significantly improve survival rates and outcomes for patients. In Saudi Arabia, our goal is to work collaboratively through initiatives that enhance awareness, screening and linkage to care, disease management, and local evidence generation. We also prioritize knowledge-sharing, bringing expertise from other regions in the world and ensuring the local scientific community has access to the latest advancements in medical research and practice." **Eid Mansour**, General Manager Gilead Sciences Arabia



"We have been working with the department of the MOH responsible for screening programs to increase awareness and improving screening ratios for breast cancer among the target population. Ultimately, it is about educating people on the importance and benefits of early detection, which significantly improves survival rates. This awareness cannot be achieved through simple ticket distribution. Instead, it requires sustained campaigns that effectively communicate the value of early screening." **Atsushi Tateishi**, General Manager, Medical Systems Business Division, FUJIFILM Middle East and Africa



Syndromic Testing: Fighting Antimicrobial Resistance

Antimicrobial resistance (AMR) is a mounting global threat, projected to cause 10 million deaths annually by 2050 if left unaddressed. This challenge is being met head-on through the introduction of **syndromic testing**—a cutting-edge diagnostic approach that enables clinicians to test for multiple pathogens simultaneously from a single sample, rapidly identifying whether an infection is bacterial or viral. This distinction is critical to avoiding the misuse of antibiotics and curbing the rise of resistant pathogens.

At the forefront of this effort is **bioMérieux**: "As an industrial manufacturer and a pioneering leader in the field of in vitro diagnostics, the fight against AMR is a priority with 75% of our R&D expenditure that is dedicated to this public health challenge. Our recent milestone was establishing our regional headquarters in Saudi Arabia which aligns with Vision 2030's focus on healthcare transformation and innovation. We are working closely with the Ministry of Health to introduce and actively deploy multiplex syndromic testing in the majority of MoH hospitals, which we have been developing over the past four years," explains **Fadi Ghanayem**, General Manager, bioMérieux Saudi Arabia.



Complementing this effort, **QIAGEN** is also partnering with the Ministry of Health to build comprehensive testing protocols using advanced syndromic panels. These protocols support timely diagnosis and treatment decisions for diseases that remain public health priorities in the Kingdom and globally.

"We're collaborating with the Ministry of Health to develop testing protocols using advanced syndromic testing. This allows us to distinguish bacterial from viral infections in a single test, ensuring the right treatment is given. Our efforts align with Vision 2030 and WHO's 2030 elimination goals for TB, meningitis, HPV, and malaria," states **Simona Grandits**, Vice President, EMEA QIAGEN, Saudi Arabia



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Cardiovascular Health

“Saudi Arabia has one of the highest rates of cardiovascular diseases in the world. To address this, not only are we collaborating with local authorities and innovative partners to develop and implement comprehensive strategies for heart health, but we have also implemented new technologies for risk assessment, including non-invasive assessment tools that help patients understand their risks. Cardiovascular disease presents a significant health challenge in Saudi Arabia, with substantial implications for public health and healthcare resources. It is estimated that the economic burden of CVD would reach USD 9.8 billion in 2035. While some risk factors for CVDs are non-modifiable, other determinants like obesity, hypertension, type-2 diabetes and dyslipidemia can be mitigated by a wide plethora of measures to control CVD morbidity and mortality. One of the key initiatives from this partnership is the Heart Health Risk Assessment Tool,



which provides a non-invasive method for rapidly evaluating and predicting cardiovascular disease risk, aligning with Saudi Arabia’s Vision 2030 of improved healthcare access.” **Maged ElShazly**, Managing Director, Bayer Saudi Arabia & Country Commercial Lead - Consumer Health



Mental Health

“Mental health remains Lundbeck’s primary focus, and Saudi Arabia has made remarkable strides. The establishment of the General Department of Mental Health and Social Health in 1983 was a key milestone, leading to significant improvements in mental health infrastructure, hospitals, and profes-

sional training. Vision 2030 has accelerated this progress, broadening the scope of mental health care to include patients’ social and physical well-being. The Danish pharma company is proud to support these efforts through continuous medical education. The team works tirelessly to share the latest updates with healthcare professionals—psychiatrists, neurologists, and general practitioners—on vital topics like migraines, depression, anxiety, and schizophrenia.”



Ophthalmology

“We have established collaborations with the Saudi Ophthalmological Society, the Ministry of Health, and leading health care entities in both public and private sectors across Saudi Arabia. With Bausch + Lomb’s broad range of products across several therapeutic areas within eye care, we focused on identifying unmet medical needs in the local market and aligning our portfolio accordingly. Our company is particularly recognized as a leader in dry eye disease management, we are expanding into other therapeutic areas, such as those for glaucoma.” **Mostafa Tharwat**, General Manager, Bausch + Lomb Pharma, Saudi Arabia



Consumer Health

“Haleon plays a significant role in Saudi Arabia’s healthcare sector, specifically in consumer healthcare. We provide over-the-counter (OTC) medicines and therapeutic oral care products in Saudi Arabia. Our brands actively improve people’s health and quality of life. One of our key commitments is promoting self-care.” **Andrzej Bekisz**, Former General Manager, Haleon.

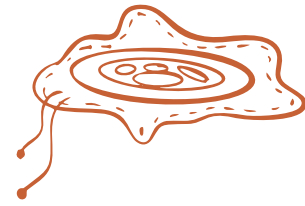


Leave no patient behind

We actively listen to and deeply understand the needs of the community we are honored to serve, striving to support them at every step of their journey.



The Rare Diseases Opportunity in Saudi Arabia



Globally, rare diseases affect an estimated 300 million people, many of whom face delayed diagnoses, limited treatment options, and access challenges. In Saudi Arabia, addressing these barriers has become a national priority under Vision 2030, which emphasizes equitable healthcare access and investment in research-driven innovation. The Kingdom's commitment to advancing care for rare disease patients is attracting global biopharmaceutical leaders who see both a moral imperative and a market opportunity.

One such company is Chiesi Global Rare Diseases, which has embedded Saudi Arabia at the heart of its regional expansion strategy. As the largest pharmaceutical market in the Gulf, Saudi Arabia offers a unique combination of scale, policy momentum, and scientific ambition. Chiesi has placed a strong focus on establishing reimbursement pathways that enable broader patient access to rare disease treatments, a challenge often faced in underserved therapeutic areas.

"Having a Saudi affiliate for Chiesi was one of the corporate goals. We have previously conducted numerous clinical trials in Saudi Arabia and anticipate conducting three or four more with MOH in 2025. To give Saudi Arabia greater visibility on the ground, we have a solid plan for knowledge transfer and will conduct numerous clinical trials," notes **Sherif Ramadan**, Middle East Cluster Head, Chiesi Global Rare Diseases, Saudi Arabia.

alliances—especially in areas with high unmet need. *"Saudi Arabia is a strategic market for us. The Kingdom is an ideal location for clinical research and innovation, especially when it comes to addressing rare diseases. We are actively collaborating with local entities like Tabuk Pharmaceuticals to accelerate progress, but also with local research centers in Saudi Arabia and the region,"* said **Tarek Farahat**, Head of Commercial & Alliances for Middle East & Eastern Europe, Moderna

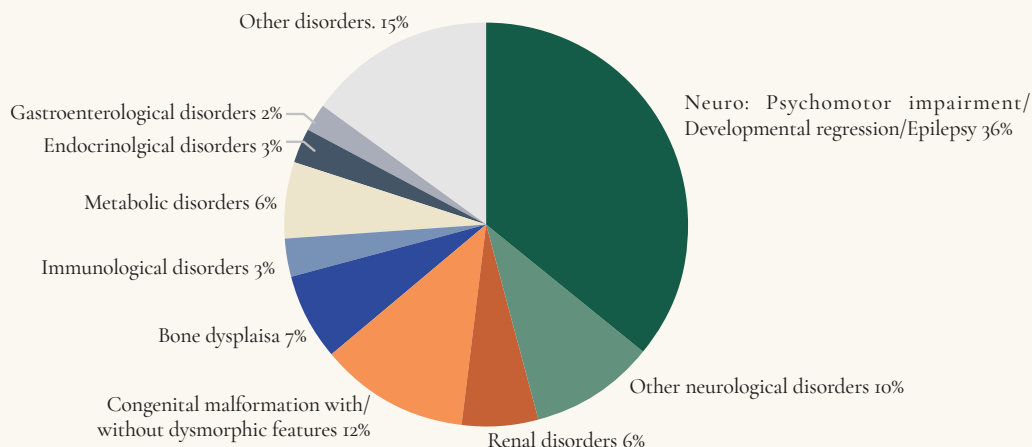


Meanwhile, rare diseases also require early intervention, and that's where Saudi Arabia's genetic testing and premarital screening programs are making a difference. Companies like Biogen view these initiatives as vital tools in enabling earlier diagnoses and improving treatment outcomes. *"For instance, in the disease area we are working on, spinal muscular atrophy, it is scientifically established that early treatment yields significantly better results than delayed treatment. Couples can avoid many problems through premarital screening. For example, if a risk is identified for when they have children, it is better that they are aware of it and better prepared. We strongly agree with the Government's genetic testing plan. Early disease detection will lead to early treatment,"* comments

Diederik Kok, Head of GCC, Biogen GCC, Saudi Arabia. As rare diseases often require cross-sector collaboration, Saudi Arabia is fostering a dynamic ecosystem where public health policy, research capabilities, and private sector innovation come together. The result is a model for regional leadership in rare disease diagnosis, treatment, and clinical development—one that is setting a precedent across the Middle East.



GENETIC DISORDERS IN SAUDI ARABIA: THE MAIN PHENOTYPES FOR THE INDEX CASES



Source: Frontiers 2023

Mohamed Fawzy

Pfizer Saudi Country President Saudi Arabia



MF: Can you share your experience and perspective on moving to Saudi Arabia during the pandemic and leading Pfizer Saudi's transformation in alignment with Vision 2030?

MF: I have been in the Kingdom of Saudi Arabia for the past four years and have seen how it has experienced significant growth and momentum, driven by its Vision 2030 initiative. I joined Pfizer Saudi in mid-2020, during the COVID-19 pandemic—a challenging and uncertain time. Through incredible partnerships with the government on various fronts, Pfizer Saudi became a trusted thought partner for decision-makers, building strong relationships that grew exponentially during this time. This trust and collaboration are things I feel deeply fortunate to have experienced as a leader. Pfizer's presence in Saudi Arabia dates back to the early 1960s, giving us a long legacy of serving patients in the region. However, the last four years have been transformative, not just in the number of patients we have reached but also in how we have evolved globally as a company.

“Pfizer has undergone a major strategic shift, and this new vision is having a direct impact on how we operate in Saudi Arabia, driving meaningful change and strengthening our commitment to the Kingdom's healthcare goals and to delivering breakthroughs that change patients' lives.”

EF: Could you elaborate on Pfizer's current footprint, key priorities, and how the company is supporting Saudi Arabia in achieving Vision 2030?

MF: Over the past few years, Pfizer has undergone a significant transformation globally, moving away from being primarily known as a pharmaceutical giant focused on primary care products toward becoming a leading biopharmaceutical company specializing in areas like oncology, vaccines, rare diseases, and life-saving hospital products. This shift reflects a completely new strategic direction and operating model for the company. In Saudi Arabia, we have successfully adapted to this global transformation. The country's Vision 2030 initiative has created a unique environment for innovation. The government's focus on bringing breakthrough medical advancements to patients quickly has enabled cutting-edge treatments and technologies to reach those who need them sooner. Pfizer's footprint in Saudi Arabia is something we are very proud of. Our footprint in the Kingdom includes being the first multinational pharmaceutical company of 100% foreign ownership licensed in Saudi Arabia, a manufacturing site in King Abdullah Economic City (KAEC). Also, to contribute to the knowledge economy in the Kingdom, we established the Pfizer Scientific Institute (PSI) in 2021. PSI's main mission is to enhance local scientific research capabilities and infrastructure through partnerships with key stakeholders in the R&D ecosystem, aiming to drive forward strategic initiatives that support Vision 2030.

In line with Saudi Arabia's Saudization efforts under Vision 2030, our aim is not just to hire Saudi talent but also to place them in impactful roles. We are also leading in women's empowerment—a key focus of Vision 2030. To address this, Pfizer Saudi launched the Women in Leadership program, designed to fast-track the growth of talented Saudi women by building their skills and giving them the tools they need to take on leadership roles. This initiative reflects our commitment to gender equality and our role as an active contributor to Vision 2030's goal of empowering women in the workforce and diversifying the economy. Vision 2030 is fundamentally about increasing Saudi Arabia's economic diversification and building a knowledge-based economy. This shift involves investing in people, enhancing quality of life, and fostering service industries that drive sustainable growth. At Pfizer Saudi, we are happy to contribute to this transformation by advancing healthcare and investing in talent and capabilities that support the Kingdom's broader goals. We are proud to be part of this journey and to play a role in shaping the future of Saudi Arabia.

EF: What initiatives are you leading in Saudi Arabia that you are most excited about, particularly the Pfizer 'Committed to You' program?

MF: The idea for this campaign came from our discussions about how to make Pfizer's 175th-anniversary celebrations more meaningful for Saudi Arabia. While Pfizer has been celebrating this milestone globally, we wanted to create something unique that truly reflects our commitment to the Saudi people and society. That is how the concept of a bespoke campaign, 'Committed to You,' came to life with its three key pillars: Committed to your future, committed to your well-being, and committed to your progress. This campaign has two key dimensions: internal and external. Internally, the message 'Committed to You' resonates strongly with our employees, showcasing Pfizer Saudi's dedication to its team. For example, 'Committed to Your Future' sends a powerful message to young Saudi talent joining Pfizer, highlighting how we are invested in their growth and career development. Externally, the campaign reflects the impact of our efforts on society. Take vaccines, for example—'Committed to Your Future' can also mean helping individuals live healthier, longer lives by taking preventative measures like vaccination. The second aspect, Committed to Your Progress, is about how we are helping to build capabilities within Saudi Arabia. For employees, this includes professional development programs, while for society, it includes our initiatives to develop local talent and capabilities and enhancing the knowledge economy and the idea that good health is foundational to achieving progress in any area of life. 'Committed to Your Well-Being' focuses on overall wellness. While this may sound like an external message aimed at society, where we are committed to developing breakthroughs that change Saudi patients' lives, it also applies internally to our employees, as we deeply value their health and well-being.

EF: Could you describe your management style and how you inspire your team and the broader organization?

MF: Leadership, in my opinion, truly reveals itself during challenging times. It is easy to lead when everything is going smoothly—when you have a strong pipeline, things are going well, and success feels effortless. But real leadership shows in moments of difficulty, whether the challenges come from within or externally. During those tough moments, I look to the people around me to see how they step up and demonstrate leadership. Another essential aspect of leadership is inclusiveness, which goes hand in hand with diversity. I believe in building a diverse team—bringing together people who think differently, approach problems from unique angles, and behave differently. But diversity alone is not enough. Inclusiveness means creating a safe space where everyone feels encouraged to contribute, share ideas, and even fail without fear. As a leader, it is important to celebrate not just successes but also failures. When you do that, you create an environment where people feel comfortable coming forward with their ideas. Often, the best ideas do not come from senior directors or executives but from those closest to the customer, someone who understands the challenges firsthand. It's important not just to have diverse voices but also to truly listen to them and empower them. Inviting people to the party is not enough—you need to bring them onto the dance floor and give them the space to shine. That is what inclusiveness in leadership is all about.

EF: As you approach 15 years with Pfizer next year, what would you consider your most significant achievement, and what will you celebrate?

MF: What truly excites me and makes me proud is seeing people at Pfizer achieve more than they ever thought possible. Watching them grow and surpass their expectations is incredibly rewarding. Another thing that deeply moves me is the impact I have made in Saudi Arabia and other countries I worked in, such as Iraq, Jordan, and Egypt. Serving patients who are in such great need is something that has always inspired and driven me. I am immensely proud of what Pfizer accomplished during the COVID-19 pandemic. Saudi Arabia has become a global example of how to manage the crisis effectively, and I am honored that Pfizer has contributed to the vaccination goals of the Kingdom. Saudi vaccination rates were among the highest worldwide, and that success played a crucial role in reopening Hajj and Umrah to Muslims worldwide. During the pandemic, these sacred rites were deeply affected, so seeing them reopen and witnessing people return to these spiritual journeys was one of my career's most defining and proudest moments.

Khaled Belghoul PhD

Astellas

General Manager KSA & UAE



EF: Could you share a bit about your journey, your progress in Saudi Arabia, and how Astella is positioning itself as a key player in the sector? Additionally, how are you contributing to Vision 2030?

KB: My career can be divided into two distinct phases. The first phase was in Europe, primarily in France, Belgium, and the Netherlands, where I held various roles in marketing and operational excellence within the pharmaceutical industry across several multinational companies. In 2015, I transitioned to the Middle East region, moving with my family to Dubai, where I joined Astellas regional headquarters.

Since then, I have taken on roles as a Country manager and General manager, overseeing operations in North Africa, starting with Algeria and eventually leading the entire Maghreb cluster (Algeria, Morocco and Tunisia). For the past three years, I have been leading our organization in Saudi Arabia and the UAE, two of the most significant and dynamic markets in the region.

This is an incredibly dynamic time for Saudi Arabia, and I truly believe it's the right moment to be here. I am very happy to be part of this journey, both personally and professionally, as we focus on growing our organization and expanding our business to make a meaningful impact in Saudi Arabia.

EF: Could you elaborate on the significance of your operations in Saudi Arabia to Astellas?

KB: Astellas, as an organization, has ambitious growth in Saudi Arabia. Saudi Arabia stands out as an important contributor in the Middle East and Africa region due to the size of the business and the dynamic nature of the market.

“As an innovative company, Astellas focuses on products driven by research and development, and partnerships. Saudi Arabia is an excellent example of a market where authorities are creating the right environment and capabilities to make new innovative medicines accessible to patients.”

This aligns perfectly with Astellas' mission to deliver cutting-edge treatments that provide added value to patients and the healthcare system.

Astellas thrives in Saudi Arabia because of the strong support for registering and adopting new, innovative treatments. This strategic alignment is evident in the proactive measures taken by local authorities, such as the SFDA and Ministry of Investment. These organizations have significantly enhanced their capabilities in recent years, fostering a supportive ecosystem for innovative players like Astellas.

EF: What are the key disease burdens you are addressing in Saudi Arabia? How have you identified these challenges, and how is your portfolio tailored to meet the specific needs of the Saudi market?

KB: I believe this can be divided into two aspects: external and internal. Externally, while Saudi Arabia is making significant improvements, the evolving regulatory landscape can present challenges but also opportunities. Over the past three years, we have seen a rapid introduction of new regulations that reflect the country's dynamic evolution and its shifting requirements.

For organizations committed to the market and its patients, adapting to these regulations is crucial. It is not about waiting for the rules to change or ease but about proactively understanding and navigating them to find effective solutions. Early adaptation is key—being among the first to align with these changes can position a company for success.

The ability to identify the opportunities and implement solutions effectively is what makes working in this market so rewarding. Flexibility and adaptability are essential traits for success here. By clearly communicating these dynamics to headquarters and securing the necessary resources, we can turn these challenges into strategic advantages.

EF: How do you attract the best talent to your team?

KB: Having the right people in the right roles is critical. While we have faced challenges in the past, there has been significant improvement over time. For instance, Saudization mandates certain key positions to be filled by Saudi nationals. While this can be seen as a challenge, it also provides a unique opportunity to nurture and develop local talent.

Some roles, such as senior positions in market access or government affairs, require specialized expertise, which can sometimes be difficult to source locally due to the evolving human resource landscape in the region. Developing young, local talent to gain the necessary experience and leadership skills takes time, but it is a worthwhile investment.

Our strategy has focused on a dual approach: competing in the market to secure the right external talent while simultaneously investing in the development of our internal talent pool. We have implemented mentorship programs that pair experienced professionals with young Saudi talent to accelerate their growth and readiness for leadership roles. This approach has been instrumental in our success across key projects and initiatives, particularly in maintaining and expanding our market share.

Culturally, we have built an environment that fosters ambition, continuous improvement, and a commitment to delivering not just for the organization but also for the patients we serve. Over the past three years, these efforts have started to show results, with 75% of our workforce now composed of Saudi nationals. This milestone reflects our long-term commitment to talent development and positions us strongly for continued success in the region.

EF: If you were tasked with designing a sustainable healthcare ecosystem, what do you think the three key pillars would be?

KB: That is a great question, and Vision 2030 provides a clear framework for designing a sustainable healthcare ecosystem. A key focus of the vision is ensuring accessibility and equity in healthcare. This involves making treatments and medical care available to everyone across the country, including those in remote areas. The decentralized healthcare system is designed to ensure that no one is left behind when it comes to receiving essential treatments and care.

Another important aspect is the development of pharmaceutical capabilities within the country. Authorities have prioritized local manufacturing of medicines and vaccines as part of their efforts to strengthen the healthcare ecosystem. This initiative has evolved significantly, with a growing emphasis on fostering research and development within the healthcare and pharmaceutical industries to drive innovation and self-sufficiency.

A final pillar of sustainability in healthcare is the goal of increasing life expectancy. Vision 2030 explicitly aims to extend the average lifespan by 5 to 10 years through improved healthcare systems, advanced treatments, and greater focus on preventative care. With these strategic objectives and continuous advancements in patient care, Saudi Arabia is creating a foundation for a thriving and sustainable healthcare system.

EF: What strategies are being implemented to educate and engage physicians on innovative medicines, deploy the latest technologies, and focus on patient care beyond treatment, while also developing local talent within the Saudi workforce?

KB: We have three key pillars in our operations here. The first is Astellas' Scientific and Technical Office, which we opened three years ago. This office focuses on bringing innovative medicines to the market, particularly those from our new pipeline. For example, we are in the process of registering a new treatment in Saudi Arabia, aiming to be the second country to approve it after the U.S. We submitted the dossier based on the U.S. approval, showcasing our commitment to introducing cutting-edge treatments to Saudi patients.

The second pillar is our long-standing joint venture with a local pharmaceutical company, which has been in place for nearly 20 years. Through this partnership, we engage in local manufacturing, not just secondary packaging. We have already localized three products here in Saudi Arabia. This collaboration with a Saudi-Japanese joint venture, allows us to manufacture locally, aligning with

the authorities' expectations for pharmaceutical companies in the region.

The third pillar focuses on life-saving treatments, such as those for transplantation. We work with one of the largest partners in Saudi Arabia, to do secondary packaging for these treatments locally. While local manufacturing for these products is challenging, we are committed to delivering them in a way that aligns with the country's healthcare needs.

This multi-faceted setup is unique and not found anywhere else in the world, even at our headquarters in Japan or the U.S. Despite being a smaller organization in terms of size, our commitment to Saudi Arabia is significant, and these efforts show our dedication to improving patient outcomes.

When you ask me about Astellas' impact in Saudi Arabia, particularly for patients, my primary focus is on delivering innovative treatments. Our goal is to bring life-saving therapies to the market, and we have consistently managed to introduce treatments that add real value. For instance, we just registered a new bladder cancer treatment that will have strong impact on helping bladder cancer patients in Saudi Arabia.

Tarek Farahat



Moderna

Head of Commercial & Alliances for Middle East & Eastern Europe

EF: Imagine yourself addressing world leaders at Davos. What message would you share about the importance of health?

TF: Public health is a major concern for governments worldwide. Many are working to improve health outcomes and increase life expectancy, particularly for high-risk individuals and the elderly. At the same time, companies like Moderna are introducing innovative technologies based on mRNA, which have potential beyond vaccines—extending into oncology, rare diseases, and more. Partnerships between governments and industries are crucial to achieving shared goals: reaching the right people, treating tough diseases, preventing them, and improving overall health outcomes.

Public Private Partnerships are vital for addressing healthcare challenges. For instance, during vaccination campaigns or ensuring supply chain efficiency, collaboration with governments helps make vaccines accessible to those who need them most. We're also exploring ways to expand public-private partnerships further across the region to maximize impact.

EF: Beyond vaccines, how do you see the acceptance of mRNA technology?

TF: Moderna has demonstrated mRNA's effectiveness during the pandemic. This proof of concept opens doors for applications beyond respiratory vaccines into areas like oncology and rare diseases. Governments recognize the potential of mRNA to transform healthcare outcomes across diverse fields.

Moderna is bringing forward its vaccine against respiratory syncytial virus (RSV), which has received approval in markets in the Middle East, including Qatar and the United Arab Emirates. Additionally, we are developing an investigational combination vaccine against COVID-19 and influenza. This approach is pivotal for the populations we aim to support, and it is currently under regulatory review by multiple authorities worldwide.

We are also researching vaccines against latent viruses such as cytomegalovirus and rare diseases. We also have initiatives in personalized cancer treatments. Moderna pipeline includes over 40 programs exploring the potential of messenger RNA across various therapeutic areas.

EF: Your role spans commercial alliances across Europe, and the Middle East. What opportunities are you identifying in the Middle East?

TF: My role focuses on expanding Moderna's reach and ensuring our innovations impact wider populations. This began during the pandemic but continues with our broader pipeline in respiratory and other fields. Strategizing with local partners in key markets ensures that our technology reaches those who need it most. Saudi Arabia stands out as our biggest strategic market in the region, but we're also engaging with other governments excited about collaboration opportunities with Moderna.

In Saudi Arabia, we've partnered with Tabuk Pharmaceuticals to bring our innovations locally. Additionally, we collaborate with other reputable partners in the region who share a similar purpose with Moderna. These collaborations aim to flourish mutual benefits while prioritizing patients who will use these innovations at the end of the day.

EF: How does Saudi Arabia fit into Moderna's strategy for the Middle East?

TF: Saudi Arabia is a strategic market for us. The Kingdom is an ideal location for clinical research and innovation, especially when it comes to addressing rare diseases. We are actively collaborating with local entities like Tabuk Pharmaceuticals to accelerate progress, but also with local research centers in Saudi Arabia and the region.

Vision 2030 aims to position Saudi Arabia as a global hub for biotech and advanced healthcare. The Ministry of Health's national strategy for elderly health aligns closely with our goals. We see opportunities to collaborate on vaccination campaigns for the elderly and introduce innovations like respiratory vaccines, including RSV, influenza, and the mRNA 1083 combination vaccine.

EF: Could you elaborate on the importance of partnerships in Saudi Arabia?

TF: Partnerships are crucial for accelerating innovation. Our collaboration with Tabuk Pharmaceuticals brings expertise, access, and connections with government entities to ensure streamlined regulatory compliance, pharmacovigilance, market access, and procurement processes. Our mRNA Access program also enables local researchers to utilize our platform for clinical studies addressing regional health challenges such as Middle East Respiratory Syndrome (MERS).

One example is our partnership with Dr. Abdullah Algaissi, an assistant professor of biology in Saudi Arabia who received the Global Moderna Fellowship Award. Through this collaboration, we support his research on MERS—a coronavirus prevalent in the region. Moreover, we have signed a memorandum of understanding with the King Abdullah Medical Research Centre to further strengthen ties between academia and industry in Saudi Arabia.

In our research, we aim to conduct clinical trials in the Kingdom focusing on rare diseases and drug discovery. These partnerships span local pharmaceutical companies and extend internationally, reflecting Moderna's commitment to innovation. Our team is devoted to building these collaborations and ensuring innovations reach a broader audience across various therapeutic areas.

EF: AI is revolutionizing how people work. Could you elaborate on how is Moderna leveraging AI?

TF: AI is deeply embedded across Moderna's operations. It allows us to optimize mRNA sequencing, enhance supply chain efficiency, aid diversity in clinical trials, and improve manufacturing precision—especially in areas like oncology research. We're proud of AI solutions, including our collaboration with OpenAI, which have rapidly integrated into our processes to drive innovation at scale.

EF: Shifting gears towards your leadership style, how do you keep your team engaged and committed to Moderna's vision and mission?

TF: At Moderna, we are always driven by a shared purpose that is deeply aligned with the company's mission statement. We focus on leveraging messenger RNA technology to produce medicines that impact people's lives. When a team shares this vision and purpose, it becomes easier to keep them engaged.

Working for a biotech company that transitioned to commercial operations during the pandemic—and is now expanding—requires a very special team. I feel blessed to work with my team, not only as a leader for the Middle East region but also as someone proud of what the team is trying to accomplish. We consistently remind each other of our shared purpose to ensure we achieve our goals.

EF: Reflecting on your career, what are you most proud of during your tenure at Moderna?

TF: Working at Moderna during the pandemic was the most meaningful experience of my career. Ensuring vaccine access to protect people was deeply fulfilling. The pandemic highlighted the transformative potential of mRNA technology, which continues to evolve medicine beyond COVID-19 into areas like influenza and RSV. I'm proud to have contributed during such a critical time while helping build the company's future pipeline and geographical expansion.

“ At Moderna, we share a unified purpose aligned with our mission—bringing innovative solutions to patients worldwide. This shared commitment inspires our team daily, fostering collaboration and dedication to achieving impactful results for communities globally. ”

EF: Do you have any final message or anything you'd like to highlight?

TF: It's crucial for governments in the Middle East and biotech companies to prioritize public-private partnerships. Regulatory clarity is essential for aligning efforts and fostering collaboration—not only with local companies like Tabuk but also with governments.

I believe in partnerships rather than traditional buyer-seller relationships. Partners share common goals and objectives, and with a mutual willingness to accelerate progress, they can achieve incredible results together. Let's continue working together toward shared goals while accelerating innovations for those who need them most.

Melvin D'Souza

Novo Nordisk

Corporate Vice President & General Manager Saudi Arabia



EF: If you could address world leaders at 'Davos' on how health creates wealth, what message would you convey?

MD: Saudi Arabia is experiencing a major shift moving beyond an 'oil driven economy' towards an innovation and value driven economy, which puts healthcare and a healthy population at the center. With around 4 million people living with diabetes and nearly 8 million burdened with obesity in Saudi Arabia, chronic diseases impact lives at an increasingly young age and setting in a flow of 'an emergency in slow-motion'. Around 70% of the Saudi population is under 35 and there is a strong connection between the work we do at Novo Nordisk and the impact on the demographic dividend of a country facing a high burden of chronic illnesses, such as obesity and diabetes.

When chronic illnesses strike early, they can impact a person's ability to earn, live, and contribute to society. These chronic conditions can also lead to more severe diseases of the heart, kidney, liver, etc. Novo Nordisk, with a portfolio that addresses the needs of this patient population, can make a meaningful impact on their quality of life, life expectancy, and economic development.

EF: What is Novo Nordisk's footprint in the KSA, and what are your 2025 priorities?

MD: Today, we are proud to be the 2nd largest and one of the fastest growing multinational pharma companies in Saudi Arabia. We reached nearly 1 million patients with diabetes and obesity last year and our vision is to reach more than 3 million patients by 2030. With a strong pipeline of new treatments and innovations on the horizon, we're focused on growing and contributing to the society in a sustainable way.

“Our strategy at Novo Nordisk in Saudi Arabia focuses on innovation, bringing solutions to the market urgently, and collaborating closely with stakeholders to make a long-term impact in this region.”

Our focus on the ground is to build sharp initiatives which make a meaningful difference to a diverse set of stakeholders in Saudi Arabia. Our main initiatives are focusing on creating Awareness, building Capacity and offering the right Treatment options – a clarion call for action called “ACT”.

Our awareness efforts revolve around engaging conversations with the Ministry of Health, Ministry of Investments, and Ministry of Industry to build supportive programs to bring about meaningful change in the society.

We have anchored investments to train and build capacity with more than 3,000 healthcare professionals per year on latest developments, cutting edge research and working on frameworks to manage chronic conditions. Good examples of these visible interventions are through international partners like SCOPE (The Strategic Centre for Obesity Professional Education), building centers of excellence in Ministry of Health and KAUST (King Abdullah University of Science and Technology), and supporting initiatives and guidelines with knowledge-based organizations and societies, such as Saudi Health Council, Saudi Scientific Diabetes Society, Saudi Society for Study of Obesity, etc.

Our commitment to innovation goes beyond product launches. We've prioritized early and close collaboration with the government, making us one of the first companies to sign agreements for localizing innovative technologies. The announcement of Insulin Local Manufacturing is a step towards ensuring sustainable access to innovative medication by collaborating with several partners like Local Content, SFDA, Ministry of Health and NUPCO to improve

access and quality of lives of people living with diabetes. This major milestone shows our commitment to patients, aligned with Saudi Arabia's Vision 2030 on Healthcare Sector Transformation to achieve a healthier nation.

Our localization effort is deeply rooted in building a sustainable and holistic approach, building a footprint of the company through entities and 'regional HQs', by localizing innovation and developing a talent pool, which represents the local needs. On all strategic pillars we are ahead of the market benchmarks.

EF: As Saudi Arabia's ambassador to Novo Nordisk Global, what is your pitch to attract resources to Saudi?

MD: Saudi Arabia is experiencing a significant rise in the prevalence of chronic diseases, and that is where our focus begins. As a responsible organization, we naturally gravitate toward markets with the highest need. Take obesity for example; if you compare G20 countries and plot prevalence against GDP impact, Saudi is right next to the U.S., showing a high economic impact due to the burden of obesity. This highlights a pressing need for action, a key reason for our strong focus on this market.

At a macro level, the country itself is changing. The Saudi Arabia of 2025 is very different from what it was in 2015. The pace of change has been incredible. If you fast forward this again to 2030, the country's Vision 2030 goals are aligned closely with what we aim to achieve. For us, it's also a chance to learn, adapt, and move faster to keep up with the market's evolving needs. With such a large market opportunity comes significant demands, and that's where Novo Nordisk can play a major role.

EF: With Novo Nordisk's exponential growth, how are you leading and managing growth in Saudi Arabia?

MD: In Saudi Arabia, obesity and/or overweight affects every other adult and diabetes touches one in every six. That means, we have an opportunity to make a difference in lives of nearly every household! For us, that's where we can make a real change in Saudi Arabia; a chance to improve lives.

For us, Saudi Arabia represents both a growth opportunity and a responsibility. We must be trusted and honest partners when reaching out to a diverse set of stakeholders and patients. We aim to leave a positive mark with our patients by delivering innovations, values, and programs that truly improve lives.

EF: What kind of decisions are you taking today that you hope will have an impact in ten years?

MD: At Novo Nordisk, maintaining the strategic focus involves understanding how the macro economy intertwines with the disease outlook, particularly in obesity and diabetes. It's crucial to assess our true impact on people's health and how our products and services align with the country's needs. We need to build stronger partnerships to serve the patients' needs. Building trust as a partner means focusing on the long term and collaborating closely with the government to align with their goals. Chronic diseases are a global challenge, but in Saudi Arabia, the scale of the issue demands a strategy tailored to this market.

The government's focus on diversifying their economy beyond oil is clear, and localization is a big part of that vision. We aim to build a credible value proposition showing our genuine, long-term commitment. It's about being present, staying practical, and creating a sustainable plan. This isn't just about business growth. It's about making a lasting impact on healthcare and for our patients in Saudi Arabia.

EF: Novo Nordisk is celebrating 100+ years. As someone that has been with Novo Nordisk for 30 years, what advice can you share on long terms partnerships and value creation?

MD: There are three key themes for reflection - Creating true value for patients, shareholders and our employees. When all these are aligned, we find the perfect solutions for partnerships that grow stronger and more meaningful over time.

For me, this is the real definition of success!

Sherif Ramadan

Chiesi Global Rare Diseases
Middle East Cluster Head



EF: Could you briefly describe the impact of the global rare diseases' portfolio on the area, how your role has changed over time, and what your current priorities are?

SR: I began working on rare diseases eight years ago, and it was a tough mission in the area because working on rare diseases is extremely different from what is done in Western countries. Although those locations have high levels of education, we have many difficulties, particularly concerning rare disease awareness and medicine, which is particularly costly. The 2030 vision places equal treatment for all Saudi citizens at the top of its priority list. Even though they are rare disease patients, they are entitled to treatment.

We concentrated more on the region, particularly Saudi Arabia, the largest market. We started considering the possibility of receiving reimbursement for our products to make them accessible to all Saudi patients. We worked with numerous additional organizations, including the Saudi National Guard, the Ministry of Health (MOH), the Ministry of Defense, and Saudi medical cities. We even participated in international clinical studies in Saudi Arabia. From a global standpoint, the Chiesi Group established a new biotech center of excellence in 2024.

“Our goal at Chiesi was to become one of the world's biggest, rare disease biotechnology companies. In 2020, Chiesi launched a single product for rare diseases; currently, in 2025, there are ten medications available.”

Focusing on rare diseases is one of MOH's major goals. The MOH declared their intention to establish a rare disease center of excellence. Together with the MOH, we have a common objective that combines the company's local vision with our global company's mission to contribute to this center of excellence by increasing awareness. We even have numerous projects with IQVIA, MOH, and other organizations that offer patient support services. Therefore, we are concentrating on ways to assist and support Saudi patients with rare diseases. Saudi Ministry of Health's vision is incredible, and the progress made over the

last 5 years under the leadership of Prof. Ahmed Aljedai & Dr. Hajer Al-Mudaiheem was outstanding, particularly with rare diseases.

EF: How do you envision eventually using your operations in Saudi Arabia to share your expertise with the rest of the world?

SR: Having a Saudi affiliate for Chiesi was one of the corporate goals. Our growing presence in a scientific office in Saudi Arabia aligns well with the Saudi government's Vision 2030. We have previously conducted numerous clinical trials in Saudi Arabia and anticipate conducting three or four more with MOH in 2025. To give Saudi Arabia greater visibility on the ground, we have a solid plan for knowledge transfer and will conduct numerous clinical trials.

Saudi patients should be given precedence in clinical trials involving such patients. Ten years ago, most centers participating in these international trials were limited to the US and Europe. We currently have even the first three studies for some of our products. We have had two Saudi centers for three years. We are working to obtain a new approval for one of our medications; we applied to the Saudi FDA before the US FDA. This showcases the pioneering role of Saudi Arabia.

Many procedures, processes, and regulations have changed in Saudi Arabia, encouraging businesses to invest and help patients.

EF: In five years, how would you like to have contributed to the realization of Vision 2030?

SR: I always advise my daughter and son to concentrate on how they can help their community. As a Muslim, I think that God promises to help you if you help someone else. Rare disease patients endure a great deal of suffering. When I had the chance to meet them, it was far too emotional. This job is more than a job; it is about helping the community. Many recruiters have called me daily, offering to transfer me to larger, more lucrative organizations, but I have told them I will stay with rare diseases until I retire. I enjoy my job in this field.

When a doctor tells one of my staff members that we have improved the lives of a rare disease patient, you understand your impact on lives. I have spent the last 20 years working in the industry, and while all businesses help patients, those specializing in rare diseases profoundly impact their lives. It makes me very happy to be a part of this journey. “Leave no patient behind” is our motto. To ensure no patient is left behind, we are making every effort and battling to reach every patient, even in the most remote cities.

Preeti Futnani

Sanofi

MCO Lead and General Manager for Specialty Care in the GCC Region



EF: You were recently appointed into your new role as MCO Lead and General Manager for Specialty Care in the GCC for Sanofi. What was your given mission when appointed, and what are you most excited about in this new role?

PF: I'm truly honored and excited to be MCO Lead and General Manager for Specialty Care in the GCC. Healthcare in this region is undergoing a massive transformation, and it's incredible to see it happening in real time. There's a strong focus on collaboration among multiple stakeholders to drive this change, especially with Saudi Arabia leading the way. Before stepping into this role, I led Sanofi's Vaccines organization in India, before transitioning here in August. I saw firsthand how innovation, partnerships, and access strategies can profoundly shape public health outcomes. Now, returning to the GCC after three years, I'm thrilled to build on that experience and create a lasting legacy in this region. I aim to expand access to groundbreaking treatments for patients and ensure they benefit from the latest advancements.

Our commitment is to ensure this region is among the first to access these innovations, and that's a personal priority for Sanofi and me. When it comes to my mission here, my aspiration is clear: to accelerate innovation by ensuring the fastest possible access to cutting-edge treatments and vaccines. This is a commitment we're making to the region. To achieve this, we must strengthen our partnerships with key stakeholders, government bodies, healthcare institutions, and industry leaders. This isn't something Sanofi can do alone; it requires collaboration across the industry, working together with ministries and governments through public-private partnerships.

Operational excellence is another key focus. I'm committed to building high-performing teams and leveraging digital transformation and Sanofi is making significant strides in this, especially in AI. Another priority is expanding local manufacturing, which is crucial in Saudi Arabia, given its alignment with Vision 2030. Finally, we're fully committed to supporting Saudi Arabia's Vision 2030 by driving healthcare transformation through research and development. With such a strong pipeline of innovative products, the question is: how do we ensure that a significant share reaches Saudi Arabia as the country undergoes this transformation.

EF: Could you elaborate on the significance of the greater Gulf region and Saudi Arabia's importance to Sanofi's global operations?

“Sanofi has been a trusted healthcare partner in Saudi Arabia for over 50 years, and our presence here has grown stronger. But our commitment to the Kingdom goes beyond just providing innovative treatments. We actively support local industrialization, clinical research, and the digital transformation of healthcare in Saudi Arabia.”

Globally, Sanofi is structured into 10 key priority markets, with the rest categorized as international markets. The Middle East, specifically this region, is one of those key priority markets. That's why we've been able to invest heavily here, bringing in resources and dedicating ourselves to advancing healthcare in the Middle East and Southeast.

I want to highlight how we support Saudi Arabia through our business units. We operate across three distinct areas. The first is our General Medicine portfolio, which focuses on primary care. The second is Specialty Care, which includes immunology, rare diseases, hematology, and oncology. This is also the business unit I oversee as General Manager. And finally, we have our Vaccine Business, a crucial part of our global healthcare mission. Looking at our footprint in Saudi Arabia, let's start with General Medicine. We were one of the first multinational pharmaceutical companies to establish a local manufacturing site in the Kingdom in 2012.

Our Specialty Care portfolio spans 15 disease areas, including immunology, which covers dermatology, respiratory conditions, multiple sclerosis, and inflammatory bowel disease (IBD). In Saudi Arabia, the prevalence of rare diseases, oncology, and hematology conditions is particularly high due to consanguinity. Through our Genzyme acquisition, we've become a leader in rare disease management in the region. Beyond Specialty Care, we also have strong vaccines, diabetes, and cardiovascular portfolios. Since 2018, we've launched over 60 products in Saudi Arabia, with 35 more planned by 2030, clearly reflecting our commitment to innovation in this priority market. We're also investing in people.

EF: What advice would you give to other women pursuing a career in pharma in Saudi Arabia and globally?

PF: When I meet with our female employees in Saudi Arabia, I'm always impressed by their boldness. They ask insightful questions about managing time, energy, and conflict. My advice to women is simple: stay curious, embrace a change-driven mindset, and don't hesitate to ask bold questions. I also encourage everyone to ask for help and have open conversations. This aligns with our company culture and my leadership philosophy, rooted in collaboration, agility, and a strong focus on patient-centric innovation. Building high-performing teams and fostering diversity is at the heart of everything I do.

In Saudi Arabia, we have specific programs to develop local talent, especially as the Kingdom transforms. We've expanded training and mentorship programs for young Saudi professionals, focusing on women. Collaborations with universities and scientific institutions help us nurture future healthcare leaders. One example is Najm, a talent acceleration program that equips young professionals with the skills, mentorship, and hands-on experience they need to become leaders. This directly supports Vision 2030 goals. This platform offers hands-on training, real-world experience, and mentorship to help them build a solid career foundation.

Abed Sabra

Roche

General Manager Saudi Arabia



EF: Could you elaborate on the role that you have had these past years, and what are the priorities next for Roche in Saudi Arabia?

AS: Working in Roche has been an invaluable experience, allowing me to be part of a healthcare-focused company dedicated to bringing innovative solutions. Unlike other sectors, the work we do here directly benefits communities, healthcare systems, and, most importantly, patients. This sense of purpose transcends locations; every time I move to a new country, I can see myself how we're adding real value to the community.

In Saudi Arabia, I see our work in alignment with Saudi Arabia's Vision 2030, especially regarding healthcare. From the outset, our teams focus on finding synergies and establishing strategic objectives to meet governmental expectations. Over the past four years, as we focused on external objectives, we equally prioritized building internal capabilities to support and sustain our strategic direction to serve patients. Along the way, we identified key areas within healthcare where our contributions could truly benefit the community and healthcare system in Saudi Arabia, aligning with the broader objectives of Vision 2030.

EF: How does Roche plan to leverage its leadership position in addressing non-communicable diseases and rare conditions in Saudi Arabia to further enhance healthcare accessibility and outcomes?

AS: The Saudi Vision 2030 aims to address critical health outcomes, such as reducing mortality and morbidity rates while increasing life expectancy. Traditionally Roche were leaders in Oncology, recently we have ventured into the areas of Ophthalmology, Hematology, Hemophilia, Rare Diseases and Neuroscience; where we have had significant impact on patients' lives. These disease areas may not currently impact mortality rates but place a substantial burden on the community, and are more prevalent in Saudi Arabia, which will enable Roche to support The Kingdoms Vision.

Accessibility to healthcare has also seen a dramatic transformation. At the start of Vision 2030, healthcare access in Saudi Arabia was at approximately 75%. Today, it stands at 96%, with a goal to reach 100% by 2030. This progress is remarkable, even globally, with Saudi Arabia now offering nearly universal access not only to primary care but also to advanced and innovative treatments. The country ranks among the top ten worldwide in terms of speed and accessibility to innovative healthcare solutions, placing it among top countries globally.

“ This unprecedented accessibility metric has created new opportunities, drawing interest from global healthcare and pharmaceutical companies to participate in Saudi Arabia's transformation. For Roche, this environment has solidified our position as a leader in healthcare solutions, spanning diagnostics, pharmaceuticals, and data-driven healthcare innovations. ”

EF: How does Roche prioritize and select its partnerships in Saudi Arabia and globally to drive innovation in healthcare, and what impact do you anticipate these collaborations will have on achieving the objectives of Vision 2030?

AS: In Saudi Arabia, we're actively engaged in partnerships across sectors to leverage the wealth of opportunities. We collaborate with MISA, MOH, SFDA and other government entities as well as major government institutions; to achieve our shared goal of advancing Vision 2030's strategic objectives.

Locally, we also work closely with other Pharma companies, for example, we worked with major pharmaceutical companies like AstraZeneca, J&J, and Lilly on clinical research initiatives. By bringing in expertise where needed—especially in areas beyond our own in pharma and diagnostics, like digital health and AI—these partnerships allow us to achieve more together than we could individually. This collaborative, multi-sector approach is key to driving innovation and impactful solutions throughout the healthcare landscape.

EF: As a leader, what key strategies do you use to keep your team engaged and aligned with Roche's mission to enhance healthcare outcomes?

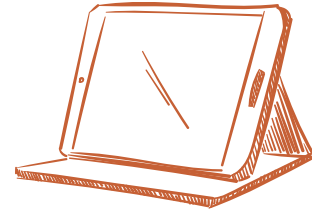
AS: When there's a clear alignment on strategic goals and a shared understanding of the impact we aim to achieve, success naturally follows. Starting as a junior pharmacist, I've always been driven by the purpose behind my work in the pharmaceutical industry, where each day presents an opportunity to make a difference in patients' lives. This clarity and sense of purpose is what has kept me committed to my role, and it's essential for fostering an organization where everyone understands their contribution to patients' well-being, not just as a business pursuit but as a true mission.

In Saudi healthcare, there's a collective understanding among all stakeholders that the patient is at the core of our efforts. It's crucial that we walk the talk, consistently asking what best serves patients and the healthcare system. Achieving this requires a collaborative approach, whether through private-private or public-private partnerships, to ensure the most effective solutions. This is a call for unified commitment towards our shared goal—improving healthcare outcomes through collaboration.

Chapter 3

Digital Foundations:
Enabling Scalable, Value-Based Healthcare

Digital Health Transformation in Saudi Arabia



As healthcare systems globally shift toward value-based care, digital technologies have emerged as the backbone for achieving scalable, efficient, and equitable health outcomes. In Saudi Arabia, digital transformation is more than a technological trend—it is a strategic national imperative aligned with Vision 2030. Through a combination of robust infrastructure, forward-thinking public-private partnerships, and groundbreaking technologies like artificial intelligence (AI), digital health tools are enabling a shift from reactive care to proactive, patient-centered health management.



“Innovation is reshaping the sector,” knows **Farah Hamdan**, General Manager- Zimmer Biomet, Central Eastern Europe, Middle East and Africa, and elaborates: “Countries are adopting AI, robotics, and genomic medicine. Saudi Arabia is investing in digital health for greater efficiency and access, while the UAE is exploring digital twin technologies for precision care. Public-private partnerships, like Saudi Arabia’s collaboration with Orion Health to develop the world’s largest health information exchange, are accelerating change. Strategic initiatives, such as Saudi Arabia’s NEOM and Dubai’s Genome Program, are transforming healthcare delivery. These are backed by strong policy frameworks—like the UAE’s AI Strategy 2031 and Saudi Vision 2030—and substantial infrastructure investments, including Saudi Arabia’s \$50 billion allocation in 2023.”

NUPCO: Streamlining Digital Procurement and Logistics

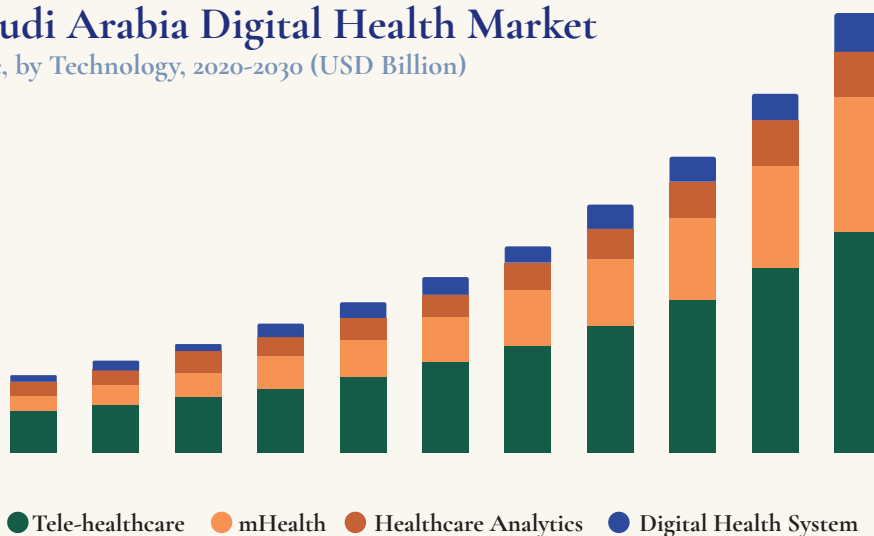
As Saudi Arabia advances its Vision 2030 agenda, digital infrastructure is playing a pivotal role in reshaping the Kingdom’s healthcare system. A prime example is the National Unified Procurement

Company (NUPCO), a fully owned subsidiary of the Public Investment Fund (PIF), which is leveraging technology to streamline procurement, enhance efficiency, and reduce waste across the healthcare sector.

Established in 2009, NUPCO operates as a comprehensive Source-to-Pay platform, automating procurement processes to ensure that healthcare service providers across the Kingdom have access to the right products—at the right price and the right time. Its centralized approach to procurement has already managed competitions valued at over 117 billion Saudi Riyals, with executed contracts exceeding 49 billion Riyals.

Beyond procurement, NUPCO provides end-to-end logistics and supply chain services, including warehousing and transportation, critical to maintaining consistent access to medical supplies across the country. It also offers a robust business solutions platform and a digital marketplace featuring more than 65,000 items, supporting transparency and ease of access. In a landscape where efficiency and agility are crucial, NUPCO exemplifies how digital transformation can empower governments to deliver better health outcomes through smarter, centralized procurement and supply chain management.

Saudi Arabia Digital Health Market Size, by Technology, 2020-2030 (USD Billion)



Source: Grand View Research

19.3%

Saudi Arabia Market
CAGR, 2024-2030

SDAIA: Powering AI-Driven Healthcare Transformation in Saudi Arabia

"AI is pivotal to Vision 2030, and initiatives like the Saudi Data and AI Authority (SDAIA) highlight the country's commitment. Our technologies reflect this direction—enhancing efficiency, care quality, and sustainable development," said Farah Hamdan, General Manager, Central Eastern Europe, Middle East and Africa at Zimmer Biomet.

Spearheading this commitment, SDAIA—the Saudi Data and Artificial Intelligence Authority—has become the Kingdom's cornerstone institution for building a data-driven, AI-powered future. Established in 2019, SDAIA is tasked with overseeing the national strategy for data and AI, fostering regulatory frameworks, and driving real-world innovation across sectors, including healthcare.

In line with Vision 2030, SDAIA has accelerated the development of a digital ecosystem that integrates vast public datasets, supports interoperability, and leverages AI to optimize services. Its initiatives, such as the National Data Bank, the Deem Government Cloud, and digital platforms like *Tawakkalna* and *Nafath*, are reshaping public service delivery, with healthcare being a primary beneficiary.

From diagnostics and clinical workflows to early disease detection and population health management, SDAIA is enabling healthcare innovation through strategic collaboration. *"From a healthcare perspective, the collaboration between IQVIA and NVIDIA is highly valuable, as it will enable new levels of agentic automation of complex and time-consuming workflows across the therapeutic life cycle,"* said **Mohamed Mostafa**, Vice President & General Manager for Saudi Arabia, Egypt, Libya, and Sudan at IQVIA. *"A significant challenge in healthcare is that most data is unstructured, scattered, and not centralized. At IQVIA, our role is to support governments and life sciences clients in transforming this data into actionable insights, enabling informed decision-making."*



AI-driven solutions are being applied to streamline healthcare operations and empower clinicians. *"Our goal is to empower clinicians to confidently make data-driven decisions, enhance the patient experience, and ultimately save and sustain lives,"* explained **Walid Tekle**, Country Director, Saudi Arabia at Baxter. *"One key challenge we focus on is the lack of interoperability between hardware and software systems. That's why we prioritize creating interoperable systems and optimizing workflows to help streamline operations for healthcare providers."*



This shift toward digitally enabled, preventive care is also transforming long-term health outcomes. *"Our vision is to be the best partner in driving healthcare transformation, particularly in Saudi Arabia,"* said **Atsushi Tateishi**, General Manager, Medical Systems Business Division, FUJIFILM Middle East and Africa. *"We aim to support the paradigm shift toward prevention and contribute to improving longevity. In practical terms, we are committed to initiatives like establishing AI screening centers in collaboration with our partners. These efforts will fundamentally reshape the healthcare landscape in Saudi Arabia."*



SDAIA's ecosystem supports these ambitions through comprehensive governance policies, national talent development programs—including the Generative AI Academy with NVIDIA—and global research partnerships. As the Kingdom invests heavily in digital infrastructure, SDAIA stands as the strategic enabler of its AI-driven healthcare future, ensuring that transformation is not only ambitious but also actionable, ethical, and sustainable.

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AI and Real-World Data: Accelerating Discovery and Diagnosis

Despite the integration challenges, artificial intelligence and real-world data are playing a transformative role in medical innovation, from drug discovery to early diagnosis and personalized treatment planning. While companies like Olympus are excited to announce new AI-based products lines, for example a new intelligent, cloud-based, app integrated and adaptable endoscopy ecosystem “designed

to to aid the early diagnosis of lower and upper gastrointestinal (GI) diseases, including colorectal cancer, ulcerative colitis and dysplasia within Barrett’s esophagus”, as **Ronald Boueri**, VP

and Managing Director of Olympus Medical Systems META, proudly explains. **Osama Braiwish**, General Manager for Saudi Arabia and Gulf Countries at Bristol Myers Squibb, emphasized the strategic value of AI in R&D: “One of the greatest

opportunities in healthcare today lies in harnessing artificial intelligence (AI) and real-world data to transform drug discovery, improve early diagnosis, and optimize treatment pathways. At Bristol Myers Squibb, we are integrating AI into

our research and development to enhance efficiency, reduce drug development timelines, and bring breakthrough therapies to patients faster. However, to fully unlock this potential, global healthcare systems must embrace digital transformation, support regulatory frameworks that ensure responsible AI use while maintaining patient privacy and ethical standards.”

This drive toward digital transformation is echoed in Saudi Arabia’s Vision 2030, where enhancing diagnostics and public health capabilities are strategic priorities. Industry leaders are responding by investing in infrastructure and collaborative platforms that connect data, accelerate diagnostics, and improve population health.

Fadi Ghanayem, General Manager of bioMérieux Saudi Arabia, highlighted the government’s proactive role in driving diagnostic innovation:

“The Saudi government has made considerable efforts, working alongside industry partners to enhance diagnostic quality. We are working on partnership agreement with MoH to create a dashboard to provide a consolidated epidemiological data overview of the connected hospitals through an IT solution. We are conducting research in our labs to develop integrated solutions that will provide valuable results. To support Vision 2030, it is essential to move towards diagnostics stewardship to improve treatment quality, reduce hospitalizations, minimize antibiotic usage, and enhance patient outcomes.”

At the heart of these efforts is the ability to manage and analyze massive datasets—particularly in fields like genomics and precision medicine, where AI is essential for interpreting complex biological information. Ensuring that data remains local, secure, and actionable is a major step toward national data sovereignty and regulatory compliance.

Simona Grandits, Vice President for EMEA at QIAGEN, emphasized the game-changing nature of bioinformatics in Saudi Arabia’s precision medicine ecosystem:

“One of our strongest assets is QIAGEN’s bioinformatics division, the largest commercial entity in the world focused on focused on bioinformatics solutions, content and services, serving customers across research and development to clinical reporting. This portfolio alone generates around \$100 million in sales. On a local level, our QDI team is setting up a data center in Saudi Arabia. This will ensure compliance with national regulations requiring data produced in Saudi Arabia to stay within the country. In the past, data had to be sent abroad for processing and interpretation, but that’s no longer an option. With our fully operational centers launching in Qi, we’re providing localized access, making expanding our business in the region much easier. This investment is a game changer, particularly in precision medicine, where massive amounts of data need smart AI-driven software for interpretation.”

Empowering Patients Through Digital Health: From Chronic Care to Mental Health and Virtual Hospitals

Saudi Arabia's digital health transformation is driving a shift from reactive to proactive care—redefining how patients engage with healthcare systems and empowering individuals to take control of their health journeys. From chronic disease management to mental health and virtual hospital services, innovation is enabling more personalized, preventive, and accessible care across the Kingdom.

The Sehhaty app for example is Saudi Arabia's national digital health platform developed by the Ministry of Health (MOH). It serves as a centralized hub for citizens and residents to access a wide range of healthcare services, aligning with the Kingdom's Vision 2030 objectives to enhance healthcare accessibility and promote digital transformation.

Digital health technologies have proven particularly transformative in the management of chronic conditions and the enhancement of patient engagement. As orthopedic care evolves, digital platforms and

robotics are enhancing recovery and patient outcomes.

"We enhance care by leveraging technologies like ROSA® Robotics and the mymobility®—a digital patient engagement platform that empowers patients through smartphones and smart devices as they prepare for and recover from surgery," said **Farah Hamdan**, General Manager for Zimmer Biomet in the region.



This proactive, tech-enabled approach is mirrored in other therapeutic areas, including diabetes care, where wearable health technologies are revolutionizing disease management and prevention.

"Abbott is at the forefront of wearable health devices, aligning with the global trend of digitization and proactive health monitoring. This innovation is expected to drive growth, especially in diabetes care. More than 10 years ago, Abbott revolutionized diabetes care with the breakthrough FreeStyle Libre CGM system – our first biowearable and now the world's most widely-used Continuous Glucose Monitor. We have a long history of bringing global innovations into Saudi Arabia. Our latest digital health solutions are at the forefront of healthcare automation and digitization, helping healthcare institutions shift from a treatment-focused model to a prevention-focused model of care. This shift aims to improve health outcomes and achieve long-term cost savings, aligning with the sustainability goals of the healthcare sector," shared **Islam Jaber**, Regional Managing Director, Abbott's core diagnostics business - Middle East-Northeast Africa Region.



This emphasis on prevention and patient empowerment also extends to mental health—a historically underserved and stigmatized area. Saudi Arabia is addressing this head-on with expanded access to mental health resources through digital platforms.

"Addressing the global challenges of stigma and underdiagnosis in neuropsychiatric disorders is a key priority for Lundbeck. The company highlights how in Saudi Arabia, the government has taken significant strides to improve mental health care, including enhanced infrastructure and comprehensive health counseling programs aimed at early diagnosis of conditions like depression and anxiety—two of the most underdiagnosed and stigmatized disorders. Initiatives such as the Ministry of Health's digital platforms have expanded mental health resources, making them more accessible to the population."

Perhaps the most ambitious digital health initiative in the Kingdom is the development of SEHA Virtual Hospital, which redefines care



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so every person can be their best.**

LU-SAU-GEN-24-07-1

delivery by removing physical barriers entirely. Launched in response to the COVID-19 pandemic, it has quickly grown into the largest virtual hospital in the world.

“Our work began at the end of 2020, during the pandemic, when we launched a telemedicine platform to assist patients and provide essential healthcare services virtually. We launched the first SEHA Virtual Hospital platform on June 1, 2021. Today, our network has expanded to include 224 hospitals. Our services cover 44 specialties and 71 sub-specialties, serving over 300,000 cases. We have received Diamond-level accreditation, the highest possible recognition, and we are proud to be the first virtual hospital globally to achieve this accreditation. Additionally, we hold the Guinness World Record for being the largest virtual hospital in the world. Creating the virtual hospital has been a completely different experience, leading to significant global achievement and a genuine transformation in healthcare. We will continue to work hard to realize our vision by exploring all opportunities,

enabling innovation, and leveraging emerging technologies. We aim to find new solutions to help patients and improve healthcare outcomes,”

said **Eng. Mona AlSubaie**, CEO, SEHA Virtual Hospital & Innovation Enablement Center and Digital Health Advisor to Assistant Minister.

Together, these initiatives highlight the Kingdom’s determination to harness digital innovation not just for operational efficiency, but to improve quality of life, enhance clinical outcomes, and support long-term sustainability. As patient expectations evolve, Saudi Arabia is positioning itself as a global leader in digital health—empowering its citizens through technology-driven, human-centered care.



Through virtual care services and “Sehhaty” app



51M

appointments and instant virtual consultations



31M

Beneficiaries of “Sehhaty” application



40M+

Vital signs readings, enhancing individuals’ ability to monitor their health effectively and accurately



87%

Reduction in report writing time for virtual radiology



Launch of the Digital Twin Technology For the early prediction of recommendation diseases and receiving preventative

Source: Health Sector Transformation Report 2024, MoH Saudi Arabia

Islam Jaber

Abbott

Regional Managing Director – Core diagnostics business – Middle East-Northeast Africa Region



EF: Islam, you've had a remarkable 20-year career at Abbott, with the last 4 years as Managing Director. Can you share more about your career journey and leadership experience?

IJ: I began my career at Abbott 20 years ago as an engineer, and over the years, I've had the privilege of working in various roles that have allowed me to serve our customers in different ways. The journey with Abbott has been incredibly rewarding. Our focus has always been on driving growth and delivering innovative healthcare solutions to help people live fuller lives.

EF: Abbott has a long-standing presence in Saudi Arabia. Can you tell us more about the company's history and current operations in the Kingdom?

IJ: Abbott is a global healthcare leader dedicated to helping people live more fully at all stages of life. Our portfolio of life-changing technologies spans the spectrum of healthcare, with leading businesses and products in diagnostics, medical devices, nutritional products, and medicines.

For over 60 years, we have proudly contributed to Saudi Arabia's healthcare sector, and we take immense pride in being a strategic healthcare partner to the Kingdom. We contribute to the development of the healthcare sector through a variety of national health programs and activities. Today, our team of over 400 people are working relentlessly to ensure that the people we serve have access to our trusted products and services.

In addition to our long-standing presence in Saudi Arabia through our offices in Riyadh, Jeddah, and Dammam, we inaugurated a Regional Headquarters in Riyadh in 2023. This strategic step underscores our commitment to supporting our consumers and customers, enhancing our ability to serve the people better by being closer to them.

Our presence also contributes to the local economy by creating job opportunities. We are proud to be committed not only to patients in the region, but also to our employees, by being a Top Employer in KSA since 2019.

EF: What does Abbott's product portfolio look like, and how does it cater to the Saudi Arabian market?

IJ: Our product portfolio is diverse, from removing the pain of fingersticks for people living with diabetes through our continuous glucose monitoring system, to connecting patients with doctors in real-time information monitoring their hearts, from easing chronic pain and movement disorders to testing half the world's blood donations, our purpose is to make the world a healthier place by bringing life-changing health technologies to the people who need them.

Abbott is at the forefront of wearable health devices, aligning with the global trend of digitization and proactive health monitoring. This innovation is expected to drive growth, especially in diabetes care. More than 10 years ago, Abbott revolutionized diabetes care with the breakthrough FreeStyle Libre CGM system – our first biowearable and now the world's most widely-used Continuous Glucose Monitor.

We have a long history of bringing global innovations into Saudi Arabia. Our latest digital health solutions are at the forefront of healthcare automation and digitization, helping healthcare institutions shift from a treatment-focused model to a prevention-focused model of care. This shift aims to improve health outcomes and achieve long-term cost savings, aligning with the sustainability goals of the healthcare sector.

And we are pursuing a clear roadmap to advance our local manufacturing capabilities in branded generic medicines and science-based nutrition products.

EF: How does Abbott support the continuous education of healthcare professionals in Saudi Arabia?

IJ: We are committed to supporting healthcare professionals in the Kingdom. Through ongoing medical educational programs, we have reached over 35,000 Saudi healthcare professionals. These programs aim to raise awareness of new research and advancements in areas such as nutrition, pharmaceuticals, diabetes care, and diagnostics. This commitment is part of our broader goal to upgrade the knowledge and skills of the Saudi medical community.

EF: What is Abbott's approach to increasing life expectancy in Saudi Arabia?

IJ: We believe that shifting to prevention-focused care models is key to increasing life expectancy. By focusing on preventive care, healthcare systems can improve patient outcomes and result in long-term cost savings. This approach aligns with our commitment to delivering innovative healthcare solutions that enhance the quality of life for the people we serve.

EF: How does Abbott align its goals with Saudi Vision 2030?

“ Abbott is fully aligned with Saudi Vision 2030, aiming to continue to be a leading and strategic partner to the Kingdom by enriching our portfolio with new products, and developing local Saudi talent. Our efforts contribute significantly to the Kingdom's transformation journey, particularly in healthcare automation and digitization. ”

EF: What advice would you give to other business leaders looking to invest in the region in Healthcare?

IJ: Continuous medical education and the adoption of digital innovation are crucial for driving efficiency and improving healthcare services.

The industry is shifting from a capital expenditure (CAPEX) model to an operational expenditure (OPEX) model, where services are bundled in one place. There is a growing trend of moving from simply providing technology to offering full-service solutions, including operations, staffing, and management. While the success of this model in the Middle East remains to be seen, it is clear that the healthcare sector is evolving towards a more centralized and service-driven approach.

EF: Finally, what message would you like to share with the healthcare sector?

IJ: My message to the sector is one of optimism and commitment. I encourage continued collaboration and innovation to achieve our shared goal of improving healthcare outcomes and contributing to the Kingdom's Vision 2030. Together, we can make a significant impact on the health and well-being of the people we serve.

Ronald Boueri



Olympus Medical Systems

Vice President, Managing Director, META (Middle East, Türkiye and Africa)

EF: Could you provide more insight into Olympus's presence in the Middle East market and share the current priorities in the region?

RB: Looking at Middle East, Türkiye and Africa, it is important to acknowledge the region's dynamics and diversity with each market having different healthcare economics, population demographics, regulatory environments, health challenges and disease burden. The Middle East, and particularly the Gulf region have developed a well-established healthcare infrastructure, strong healthcare spending, and solid market access capabilities. In this region, Olympus is well-positioned with dedicated and fully established and trusted partners representing us in each country, which allows us to maintain a strong and consistent presence and ensure we continue to bring the best service and support to our customers while enhancing patient care.

I am very much pleased with the progress we have made in the Middle East region in the last couple of years as we remain committed to improving lives across the region, ensuring we have a strong local representation, collaborating closely with local Health care Professionals, offering medical educational programs through the Olympus continuum, and introducing Olympus's latest medical technologies to these markets.

One of the most significant milestones has been the establishment of our new partnership in KSA with Gulf Medical, a leading player in Saudi Arabia's healthcare sector. This transition marked an important step forward for Olympus and our stakeholders in the kingdom. Another key milestone was the launch of our RHQ office in Saudi Arabia. This development reflects our long-term commitment to strengthening our presence in the country and the META region.

In addition, we have established a local Service Center in Saudi Arabia—an Olympus-certified workshop with the right infrastructure and capabilities to perform repairs locally in the kingdom. This investment significantly enhances our ability to support customers, improve turnaround times, and sustain long-term market growth from within. We recently inaugurated this facility and plan to open a second one later in the year.

EF: What are the key therapy areas you see experiencing the most growth in Saudi Arabia?

RB: In Saudi Arabia, we see strong growth potential in several key therapeutic areas—particularly gastroenterology, including endotherapy, as well as respiratory care and urology. These are the segments where we play a leading role globally, supported by a strong portfolio and advanced technology. Soon we will be introducing our latest innovation, the new intelligent endoscopy ecosystem, OLYSENSE.

OLYSENSE CAD/AI: AI-Powered Endoscopy is designed to aid the early diagnosis of lower and upper gastrointestinal (GI) diseases, including colorectal cancer, ulcerative colitis and dysplasia within Barrett's esophagus. Olympus introduces the OLYSENSE platform, a cloud-based, integrated and adaptable digital endoscopy suite of seamlessly connected apps and solutions that create a sophisticated, simple and scalable Intelligent Endoscopy Ecosystem. We are very excited to see how this innovation will transform endoscopic procedures and contribute to better patient outcomes across the region.

We are focusing our efforts and investments in these areas, not just in Saudi Arabia but also across other key markets. This includes allocating resources, strengthening our marketing activities, and enhancing professional education to ensure we continue supporting healthcare professionals and drive growth in these fields.

EF: You mentioned that the partnership with Gulf Medical has been a key driver of growth. Could you share how you approached building and fostering the success of that partnership?

RB: In any market where a company operates through a distributor, success ultimately hinges on the strength and capabilities of that partner and not just on how strong your portfolio is or your brand offering. This holds true for Olympus as well. No matter how advanced your technology might be, without the right partner and the needed infrastructure and local capabilities, there's a real risk of underrepresentation in the market. That's why we place great importance on selecting, supporting, and driving our business with partners who share our vision, values, and commitment to delivering high-quality healthcare solutions. This was critical for us not only in Saudi Arabia but across all the markets in META.

The success of our partnership with Gulf Medical came from a shared vision of the market's growth potential and a mutual commitment to a win-win approach. I see it more that we complement each other: As a manufacturer, we bring in the technology, know-how, and marketing expertise, but we cannot do it on our own.... In the case of Saudi Arabia, Gulf Medical brought in their local expertise and skill sets, investment capabilities, and a deep understanding of the market, which helped in bridging the needed success. Another key factor in our successful collaboration is our shared commitment to offer best in class professional education programs to healthcare professionals. We understand that the future of healthcare relies on professionals who are not only familiar with the latest technologies but are also continuously advancing their skills. That's why we place a strong emphasis on professional education, hands-on training, and knowledge-sharing initiatives, helping healthcare professionals (HCPs) stay ahead in an ever-evolving field and ultimately enhancing and elevating patient care..

EF: Given that Japan has one of the highest life expectancies in the world, how do you see Olympus, as a Japanese company, contributing to initiatives aimed at increasing life expectancy in alignment with Saudi Arabia's Vision 2030?

RB: As a Japanese company renowned for its advanced medical technologies, Olympus is well-positioned to support Saudi Arabia's Vision 2030, which aims to enhance healthcare services and increase life expectancy. Japan's remarkable life expectancy can be attributed to a combination of factors, such as advanced medical technology, universal healthcare coverage, and a strong focus on preventive care—all elements that align with Saudi Arabia's healthcare objectives.

At Olympus we are committed to early detection and treatment, particularly in the gastrointestinal (GI) field, with a strong emphasis on cancer prevention. A significant initiative in this area is our partnership with the Saudi Ministry of Health to support colorectal cancer (CRC) awareness campaigns. This collaboration aims to complement the Ministry's efforts by raising public awareness and providing education on CRC prevention and early detection.

EF: Given your extensive career in the Medtech sector and your current role at Olympus, what advice would you offer to other CEOs or professionals in the Medtech industry who are looking to build a successful career in this field?

RB: Great question and it touches on a lot what makes such a high-stakes, high impact industry. A few core principles to highlight:

- Patient centered obsession: At the end of the day, it's all about outcomes. Our decisions should be focused towards improving patient outcomes, improving patient safety, and improving patients' lives.
- Building the right team and fast... All lies with the people and the team of individuals you build around you. That will make it or break it. Talent is key!
- Partnership is power: As I highlighted above, you need to build the right support system in the region and that comes from strategic alliances and partnerships with local distributors who can be your execution arm for any strategy built in place.

- Last and not least, culture: and this can become a major differentiator if you do it right. A good culture is one built on resilience, humility and adaptability. This will help your team weather the setbacks and move faster when things are right.

Prioritize people, foster collaboration, and remain focused on long-term objectives to drive meaningful impact in healthcare.

EF: Do you have a final message for our readers?

RB: Success in Medtech and in this part of the world is not a given and is not easy. It's not only about building or delivering a strong technology but more about navigating complexities and coming up with solutions, focusing on positive outcomes for patients and stakeholders. Our recent initiatives underscore our commitment to Saudi Arabia's growth and the broader development of the region.

“ Our strategic focus remains on sustainable growth, and we are dedicated to continuous improvement rather than resting on our current achievements. This dedication aligns with our refreshed core values—Patient Focus, Integrity, Innovation, Impact, and Empathy—and our goal to make people's lives healthier, safer, and more fulfilling. ”

Through these efforts, we aim to contribute meaningfully to the advancement of healthcare in Saudi Arabia and the wider MENA region, reinforcing our role as a trusted partner in medical technology.

Simona Grandits

QIAGEN

Vice President, EMEA



EF: you have recently appointed to your new position as VP of EMEA for QIAGEN. What is the mission you set for yourself?

SG: I come from an emerging market where healthcare often has to be built from the ground up and I am still focusing on developing and emerging countries, particularly low- to middle-income nations, in my role at QIAGEN. In some countries, even the most basic infrastructure is missing and as a healthcare community, we must support these regions through restructuring and reforms with optimism and real backing. Market size and budgets don't matter as much as advocating for people in countries with limited resources. In developed countries, the focus shifts to breakthroughs like faster, easier, and noninvasive biomarker analysis, especially in women's health, where we can provide results with minimal invasiveness. I aim to make healthcare more equal, less invasive and a right, not a privilege reserved for a sub-group of individuals.

EF: Can you elaborate on the footprint you have in the region and what are your priorities?

SG: We already have a strong and growing presence in the Middle East, where we've been active for many years. In Saudi Arabia, we're opening a Regional Headquarter office for the regional team, along with a showroom where we can host customers, engage with authorities and launch innovations directly in the country. There's still a great need for specialized training and education; this expansion will help us strengthen those efforts. I'm especially proud that our Saudi office fully aligns with our company's ESG principles.

EF: What are the key things you identify that you are translating from QIAGEN global and localizing it into the Middle East and specifically to Saudi Arabia? And how does it compare to other markets?

SG: My team devised a great word to describe what we do: *globals*. It reflects our approach: team members with global education, training, and experience who apply that knowledge locally. Local teams should drive strategies and investments because they bring long-term commitment, energy, and understanding, unlike those who stay for just a few years and move on. Our Saudi team comprises people already living in the country, working toward a shared vision of transforming healthcare.

Our strategies are built around local public health needs, market deployment, and technology adoption. One key focus is preventive testing for latent TB infection using our widely adopted solution QuantiFERON® TB Gold Plus. This is especially relevant in the Middle East, where large numbers of expatriates from high-TB-burden countries pose a risk of infection spread. We're working with the Ministry of Health to integrate preventive testing programs for healthcare workers and communities.

Another major area is the challenge of meningitis in children, a disease that can be fatal in newborns. We're collaborating with the Ministry of Health to develop testing protocols using advanced syndromic testing. This allows us to distinguish bacterial from viral infections in a single test, ensuring the right treatment is given. Our efforts align with Vision 2030 and WHO's 2030 elimination goals for TB, meningitis, HPV, and malaria. For malaria, we've developed a new surveillance product planned for launch in 2025 designed for high-burden countries in Africa. It enables detection from a simple finger-prick blood spot, making testing more accessible. Given the movement of people between Africa and the Middle East, this solution could also be valuable for regional public health programs.

Vaccine effectiveness is another key topic. As we monitor COVID-19 vaccine efficacy, we must assess how well new vaccines work. Malaria could be a major focus in the next couple of years. Traveling to affected regions often requires taking preventive pills, which are expensive and can cause unpleasant side effects.

EF: How are you strategizing your experience through difficult times like the pandemic to become more responsible and resilient in future situations? Do you think there is global preparedness, and is the country prepared?

SG: The WHO's last three reports on pandemic preparedness illustrate strong opportunities for growth. A year after the pandemic, countries were quick to commit budgets and ramp up infrastructure, but now they are falling short of those promises. We are already forgetting the importance of preparing for the next crisis. At QIAGEN, we have a dedicated team of scientists worldwide tracking signals of potential outbreaks, whether it is a pathogen spreading outside its usual area or one that's being detected more intensely. For example, we have seen Ebola resurface in Uganda and the Marburg virus in Tanzania. I get a detailed report on these signals from our global monitoring sites every Monday. This helps us stay prepared.

During the pandemic, we were the first company to have a syndromic respiratory pathogen test to be used for testing for COVID-19. It was a QIAstat-Dx cartridge with primers for the virus. We've kept that flexibility because we can make internal decisions much faster than other, larger med-tech companies which have to deal with more internal bureaucracy. This agility is our advantage, and we used it for Mpox, for instance. We developed a cartridge for our syndromic platform that could differentiate Mpox from chickenpox. Countries were thrilled because it allowed them to identify outbreaks and respond effectively and quickly. It was also interesting to see adult infections at levels we hadn't seen before. The point is that we're staying vigilant and ready to act, even if others aren't.

EF: When it comes to AI, how do you see QIAGEN leveraging AI internally and externally? Do you have the same practices globally, or are you carrying out different practices across different markets?

SG: Our CEO has clarified that our goal is to become the biggest AI company in healthcare. That vision drives everything we do and integrates AI across the board.

“One of our strongest assets is QIAGEN's bioinformatics division, the largest commercial entity in the world focused on focused on bioinformatics solutions, content and services, serving customers across research and development to clinical reporting.”

This portfolio alone generates around \$100 million in sales. On a local level, our QDI team is setting up a data center in Saudi Arabia. This will ensure compliance with national regulations requiring data produced in Saudi Arabia to stay within the country. In the past, data had to be sent abroad for processing and interpretation, but that's no longer an option. With our fully operational centers launching in Q1, we're providing localized access, making expanding our business in the region much easier. This investment is a game changer, particularly in precision medicine, where massive amounts of data need smart AI-driven software for interpretation. With this setup, we're significantly strengthening our presence in Saudi Arabia, giving more customers access to advanced solutions.

Eng. Mona AlSubaie

SEHA

CEO, SEHA Virtual Hospital & Innovation Enablement Center and Digital Health Advisor to Assistant Minister



EF: SEHA Hospital now has a network of over 200 hospitals within three years of its inception, a clear testament to your progress in a fast-paced digital world. Could you elaborate on its development and share your current top priorities?

MA: We are inspired by Vision 2030 in the Kingdom, particularly by the healthcare transformation program that is part of the initiative. Our goal is to achieve its objectives. Vision 2030 is built on three pillars: a vibrant society, a driven economy, and an ambitious nation. Our work began at the end of 2020, during the pandemic, when we launched a telemedicine platform to assist patients and provide essential healthcare services virtually, helping to prevent the spread of infections. We launched the first SEHA Virtual Hospital platform on June 1, 2021, starting with just three specialties: hematology, rehabilitation sub-specialties, and virtual radiology. At that time, our network included only 30 hospitals. We quickly explored new opportunities and identified gaps we could fill, expanding our services significantly.

Today, our network has expanded to include 224 hospitals. Our services cover 44 specialties and 71 sub-specialties, serving over 300,000 cases. We have received Diamond-level accreditation, the highest possible recognition, and we are proud to be the first virtual hospital globally to achieve this accreditation. Additionally, we hold the Guinness World Record for being the largest virtual hospital in the world.

EF: What has your experience been in reshaping SEHA Virtual Hospitals the protocols and training new physicians to work with modern health models? this area?

MA: We created most materials from scratch when activating the telemedicine platform. We started by conducting online workshops to train practitioners to deliver services effectively. These workshops cover essential topics such as interacting with patients, starting and ending conversations, and more. These steps are crucial, as patient satisfaction hinges on our service quality. In our teleconsultation and virtual clinic services, we measure patient satisfaction through surveys sent after they use our services. We designed these surveys to address various aspects, including technology and physician interaction. In addition to direct patient services, we offer virtual services to hospitals, such as radiology and ICU support. Moreover, we have a supervisory role under the Ministry of Health, overseeing the virtual clinic facilities. I lead a dedicated team focused on patient experience, responsible for providing analytics, reports, and feedback. Every quarter, I review satisfaction percentages and other feedback to identify areas for improvement in our services and to address any technical issues. This is an ongoing process, and we continuously learn and adapt to enhance our offerings. We are in a constant loop of innovation, which requires significant effort, flexibility, and adaptability.

EF: Who are the primary consumers of virtual health services? Is its use primarily a generational trend, with only younger populations engaging? How challenging is it to provide access to various age groups?

MA: Regarding demographics, our consumers are eligible patients from the general population. We operate under the SEHA Virtual Hospital but plan to extend our services beyond the Ministry of Health facilities soon. Our services are available to all eligible citizens and residents. We offer a 24/7 clinical consultation service accessible to the entire population and in multiple languages. Approximately 3 to 4 million guests annually visit Saudi Arabia during a specific season. Our services are also available through a hotline staffed by a diverse pool of doctors who can communicate in various languages.

Our consumers' age and ability to use technology can pose challenges. To address this, we have introduced a preliminary step in our protocols. Before a user can make an appointment, a team member calls the patient or caregiver to ensure that the patient can navigate the application. If they are uncomfortable using it, we offer services over the phone instead. We are actively working on making the experience seamless for the patient, while maximizing understanding, and outcomes.

EF: What legacy are you building, or what do you hope to create?

MA: I am incredibly proud of what we have accomplished so far. Creating the virtual hospital has been a completely different experience, leading to significant global achievement and a genuine transformation in healthcare. We will continue to work hard to realize our vision by exploring all opportunities, enabling innovation, and leveraging emerging technologies. We aim to find new solutions to help patients and improve healthcare outcomes.

Having a clear mission and believing in it is essential. By investing in your people, trusting them, incorporating innovative technologies, and placing the patient at the center of care, lives can be saved, and new global standards can be established.

“ Focusing on the patient and embracing new technologies will transform and alter our perceptions of healthcare. This success was not just about technology; it was about trusting our teams, empowering our healthcare workforce, and prioritizing every patient—no matter where they are. ”

Walid Tekle

Baxter

Country Director, Saudi Arabia



EF: Could you briefly introduce yourself and the role Baxter has in Saudi Arabia?

WT: I bring 24 years of experience in the **healthcare industry**, having worked in multiple roles and pursued various educational programs. This journey has shaped my commitment to advancing healthcare and delivering meaningful change. My connection with Saudi Arabia began with my first business visit in 2001, and I relocated here permanently in 2013. In July 2022, I joined Baxter as the Country Director, leading our mission to save and sustain lives and expand Baxter's presence and impact across the Kingdom's healthcare landscape.

At Baxter, we are proud to touch the lives of millions of people worldwide every day. Our diverse portfolio spans the entire continuum of care: **pharmaceutical products, medical devices, and capital equipment**, offering **integrated care solutions** under one company. These products and therapies are at the heart of hospitals and clinics—from the emergency room to the operating room, the pharmacy to the ICU—and they also play a crucial role in advancing patient care within the home.

In Saudi Arabia, our three main business segments are Medical Products and Therapies (MPT), Healthcare Systems and Technologies (HST)—which encompasses Hillrom's legacy innovations—and Pharmaceuticals. What I value most about Baxter is the diversity in our portfolio and our focus on delivering integrated care, allowing us to meet the evolving needs of patients and healthcare providers.

Ensuring the **right culture is in place is a cornerstone** of my leadership approach. In rapidly growing economies like Saudi Arabia, success comes from building the right team, fostering strong execution, and maintaining **forward planning**. By creating a culture that emphasizes customer needs and a true partnership mindset, we can focus on the details and **execute with both speed and quality**. With this guiding principle at the heart of everything we do, I believe all other aspects of success naturally follow.

EF: Could you elaborate on the footprint Baxter has in Saudi Arabia and what are the priorities?

WT: Starting in 2024, we at Baxter are proud to be among the pioneering companies establishing a headquarters (HQ) in Riyadh, complementing our existing Baxter Scientific office. Before this, we had already stationed multiple employees in Riyadh, supporting the Middle East region across critical functions such as regulatory affairs, supply chain, marketing, and more. Establishing the HQ is a testament to our commitment to growth and deeper engagement within the Kingdom of Saudi Arabia. We are fortunate to witness and be part of the remarkable advancements taking place across Saudi Arabia under **Vision 2030**. **The country's transformation inspires us** and serves as a profound learning opportunity, enabling us to serve more patients in the Kingdom.

EF: Could you elaborate on how your diversified portfolio is adapted to Saudi Arabia's specific market needs, and where you see growth opportunities?

WT: For more than 90 years, Baxter has been operating at the critical intersection where life-saving innovations meet the healthcare providers who bring them to patients. With products, digital health solutions, and therapies available in over 100 countries, we are proud to build upon a rich heritage of medical breakthroughs as we work toward advancing the next generation of transformative healthcare innovations.

“ Our goal at Baxter is to partner with healthcare providers to deliver high-quality, patient-focused solutions that meet the challenges of today while advancing innovations for tomorrow. ”

EF: What are the key challenges Baxter is addressing in healthcare today, and how do your solutions help healthcare providers navigate these challenges to improve patient outcomes?

WT: At Baxter, we take great pride in being a trusted partner to healthcare providers, delivering clinically essential innovations that transform care throughout the patient journey. Our goal is to empower clinicians to confidently make data-driven decisions, enhance the patient experience, and ultimately save and sustain lives. One key challenge we focus on is the lack of interoperability between hardware and software systems. When systems can't communicate effectively, workflows are disrupted, and efficiency is limited. That's why we prioritize creating interoperable systems and optimizing workflows to help streamline operations for healthcare providers. Another major challenge is the difficulty of accessing meaningful data to support clinical decision-making. Baxter addresses this by providing real-time insights, enabling clinicians to make informed decisions that improve patient care. To ensure continuous patient support, we offer advanced diagnostics and remote monitoring tools that facilitate seamless care throughout the patient journey. These innovations not only help healthcare providers deliver higher-quality care but also create more opportunities for proactive, patient-centric healthcare.

EF: How would you like to be remembered at Baxter five years from now?

WT: I want to make a meaningful difference wherever I work, regardless of location or situation. Making a difference is very important to me. One thing I value deeply is **being proactive**. I want to be remembered as someone who was **always ahead of the curve**, adapting quickly and staying in sync with the changes, especially in Saudi Arabia. **Change** is happening right now, and we have a choice—**either leading or following it**. If change is coming, I want to be at the forefront of a company that is providing innovative solutions that always meets patients' needs and healthcare challenges.

Atsushi Tateishi

FUJIFILM

General Manager, Medical Systems Business Division, Middle East and Africa



EF: Could you elaborate on Fujifilm's footprint in Saudi Arabia, the role of its medical systems division, and the key priorities you are focusing on today?

AT: Our primary focus is on the diagnostics sector, which we categorize under the medical business, encompassing a range of solutions. Within this segment, we provide radiology equipment such as CT, MRI, X-ray, and mammography, as well as ultrasound and endoscopy systems. Additionally, we offer in vitro diagnostic devices like blood and urine analyzers. Complementing these are our globally leading healthcare IT systems, where we lead the market.

Fujifilm's presence in the Saudi market spans decades—for over 20 years. Over this time, we have established strong relationships with customers and introduced a comprehensive portfolio of products across the region. Following our acquisition of Hitachi, which brought advanced CT, MRI, and ultrasound capabilities, we have continued to strengthen our offerings. Excluding these, we already held significant market shares in digital mammography, general X-ray, and endoscopy, where we continue to grow. Our efforts are now yielding results, with improved market traction and increasing market share.

EF: Could you elaborate on how Fujifilm is working towards becoming a trusted partner in Saudi Arabia? Could you share some details about the MOUs and related initiatives?

AT: Last October, during the Global Health Exhibition, Fujifilm made its debut with a dedicated booth, marking a significant milestone. While we have had a presence in the region through distributors in the past, this was the first time Fujifilm presented itself directly. To amplify our presence at the event, we

organized an MOU signing ceremony with **six** prominent healthcare institutions in Saudi Arabia, many of which are prestigious hospitals.

The majority of these MOUs focus on implementing Fujifilm's AI technology to enhance healthcare services in the Saudi market. One notable partnership is with Flow Medical, the procurement body for one of the largest private hospital chains in Saudi Arabia. This collaboration goes beyond supplying endoscopy systems; it also includes the establishment of a repair service center for endoscopes.

As part of our efforts, we have begun installing our AI application, CAD-EYE, at the Dr. Sulaiman Al Habib Hospital Group. This application aids in early detection during endoscopy procedures by identifying polyps and characterizing their tissue to determine whether they are tumors. We are also working closely with hospitals to educate healthcare professionals on how to utilize this technology effectively in clinical settings. We aim to engage a broader network of doctors through training and collaboration to maximize the impact of this innovation.

EF: How do you perceive the current level of awareness about early diagnostics, and how can this shift support the move toward a more preventative approach in the healthcare industry?

AT: Almost five years ago, we participated in a breast cancer screening project in Saudi Arabia, supported by a charity organization. Through this collaboration, we provided more than 10 mammography systems to screening centers. Additionally, we equipped mammography buses to make screenings accessible in remote areas, allowing women to undergo tests conveniently.

Prior to the Global Health event, we have been working with the department of the MOH responsible for screening programs to increase awareness and improving screening ratios among the target population.

Ultimately, it is about educating people on the importance and benefits of early detection, which significantly improves survival rates. This awareness cannot be achieved through simple ticket distribution. Instead, it requires sustained campaigns that effectively communicate the value of early screening for breast cancer.

EF: How receptive do you think the Saudi mindset is toward embracing prevention and diagnostics as essential components of the future of healthcare?

AT: The recognition of the importance of this shift is still primarily at the higher levels of authority, and the MOH understands the importance to filter this down to the population. I believe there is going to be significant progress in raising awareness about prevention in the near future.

During my time in Canada, I observed there was a healthcare system entirely built on universal coverage. While the government funds it, they invest in high-end machines and pay significant amounts for maintenance services. Because of this setup, there is still a shortage of devices like MRI machines. The wait times after a doctor's referral can be excessive—four or five months in some cases. During that time, a condition like cancer could worsen significantly. It felt unfair, but it also highlighted the dilemma healthcare systems face.

Our approach is different.

“ We aim to reduce the need for such high-tech treatments by focusing on solutions that emphasize prevention. This vision motivates me to drive this business forward and support the paradigm shift toward preventative healthcare. ”

EF: Looking ahead to Vision 2030 and its final sprint over the next five years, what role do you envision Fujifilm playing in helping achieve these goals during this period?

AT: Our vision is to be the best partner in driving healthcare transformation, particularly in Saudi Arabia. We aim to support the paradigm shift toward prevention and contribute to improving longevity. By doing so, we aspire not only to enhance the quality of life but also to support the country's economic growth, leveraging a healthier and longer-living population.

In practical terms, we are committed to initiatives like establishing AI screening centers in collaboration with our partners. These efforts will fundamentally reshape the healthcare landscape in Saudi Arabia, positioning us as a key player in this transformative journey.

Farah Hamdan

Zimmer Biomet

General Manager- Central Eastern Europe, Middle East and Africa



EF: How are Middle Eastern countries leveraging macroeconomic trends, healthcare innovation, and strategic government initiatives to drive sustainable growth in their healthcare sectors?

FH: Middle Eastern countries are advancing healthcare by aligning macroeconomic trends, innovation, and strategic initiatives.

Macroeconomically, the MENA region's healthcare market is set to grow at a CAGR of 11.7%, reaching \$243.6 billion in 2023. This is driven by population growth, rising chronic diseases, and pro-investment policies like Egypt's "golden license" for foreign investors.

Innovation is also reshaping the sector. Countries are adopting AI, robotics, and genomic medicine. Saudi Arabia is investing in digital health for greater efficiency and access, while the UAE is exploring digital twin technologies for precision care. Public-private partnerships, like Saudi Arabia's collaboration with Orion Health to develop the world's largest health information exchange, are accelerating change.

Strategic initiatives, such as Saudi Arabia's NEOM and Dubai's Genome Program, are transforming healthcare delivery. These are backed by strong policy frameworks—like the UAE's AI Strategy 2031 and Saudi Vision 2030—and substantial infrastructure investments, including Saudi Arabia's \$50 billion allocation in 2023.

Together, these efforts are not only improving outcomes but also establishing the region as a global healthcare innovation hub.

EF: Could you elaborate on your footprint in the region and your priorities at a regional level?

FH: We operate across Eastern Europe, the Middle East, and Africa through direct offices and a robust network of distributors, ensuring presence in nearly every country.

Zimmer Biomet, with nearly a century of experience, and more than 50 products in the portfolio, brings innovation to our customers and to patients across the region.

“ Our regional priorities are clear: drive innovation, expand into underpenetrated markets—particularly in extremities and trauma—and deepen customer engagement. ”

We enhance care by leveraging technologies like ROSA® Robotics and the mymobility®—a digital patient engagement platform that empowers patients through smartphones and smart devices as they prepare for and recover from surgery.

We're committed to sustainable growth, strong partnerships, and delivering reliable, high-quality solutions that meet rising demand for musculoskeletal healthcare.

EF: What advice would you give to others willing to pursue a career similar to yours with your success?

FH: Build a strong educational foundation in healthcare or business, and keep learning. Gain broad industry experience, sharpen leadership and communication skills, and stay up to date on industry regulations.

Patient focus is essential—technology and strategy should always serve that goal. Embrace innovation, be adaptable, and never compromise on ethics. Build strong networks and seek mentors who can guide your journey.

Mostafa Tharwat

Bausch + Lomb Pharma
General Manager, Saudi Arabia



EF: Could you elaborate on what attracted you to Bausch + Lomb, and the footprint in the market?

MT: Bausch + Lomb is a global eye health company with over 170 years of history, known for its strong legacy and specialization in the field of eye care.

I took on the role of General Manager for Saudi Arabia, leading the transformation and the change of the business model in Saudi Arabia, focused on growth and stronger market presence.

Bausch + Lomb operates across three main divisions: pharma consumer, surgical devices, and vision care. In Saudi Arabia, I am currently overseeing the pharma consumer division, which is a critical part of our growth strategy in the region.

We have registered our Regional Headquarters in Saudi Arabia, and we're planning to have our formal office opening in 2025.

EF: Could you share some of the key lessons you have learned so far on this journey?

MT: There are three areas that have been fundamental to our journey so far: Go-to-market strategy, a high performing team with ownership, and strategic partnerships. Assessing our current footprint and determining how to make it more sustainable in the long term was critical.

Our team began by analyzing the market and reviewing our existing portfolio. With Bausch + Lomb's broad range of products across several therapeutic areas within eye care, we focused on identifying unmet medical needs in the local market and aligning our portfolio accordingly. This approach allowed us to prioritize products that would deliver the greatest benefit to patients in Saudi Arabia, ensuring we could fulfill our mission to help people see better and live better.

After setting these priorities, we worked closely with the Saudi FDA to register our products. We established a clear registration plan and are now advancing with an ambitious launch strategy. This year, we plan to bring at least three new products to the market.

EF: Could you share more about your portfolio, and what are you most excited about?

MT: We offer a comprehensive range of therapies, including treatments for dry eye disease, eye redness, glaucoma, and corneal healing. Our company is particularly recognized as a leader in dry eye disease management, thanks to our broad portfolio of specialized products that have established a strong presence in the Saudi market.

EF: Could you elaborate on how your organization's strategic partnerships contribute to advancing patient care across the Kingdom?

MT: Strategic collaborations with healthcare institutions are central to our approach. We have established collaborations with the Saudi Ophthalmological Society, the Ministry of Health, and leading health care entities in both public and private sectors across Saudi Arabia. These collaborations enable us not only to deliver innovative products and solutions, but also to raise the standard of care for patients and advance professional knowledge and practices within the ophthalmology community.

We are also working closely with these institutions to increase awareness of eye diseases, address their burden, and implement effective screening and treatment protocols. By engaging with both public and private entities, we ensure that our solutions are accessible to the right patients, especially those who are most in need.

EF: Could you elaborate on how Bausch + Lomb is supporting this process and contributing to Saudi talent?

“One important focus for us at Bausch + Lomb is enhancing our external footprint and supporting the healthcare ecosystem in Saudi Arabia. A key initiative we are working on is building capabilities within the eye healthcare sector, which is constantly evolving and growing. It is vital to develop these capabilities to ensure the ecosystem remains strong and sustainable.”

As part of our efforts, we collaborate with specialized institutions and hospitals to provide educational programs and support existing ones, helping to build the capabilities of healthcare providers. This is a critical aspect of our work.

On the internal side of the company, we are deeply committed to developing local talent. We prioritize hiring potential leaders from within Saudi Arabia and nurturing them to become future leaders. This is part of our broader goal to build a high-performance organization where talent can thrive. If we succeed in developing this talent in the right way, it will contribute to creating a sustainable company within a sustainable ecosystem.



Chapter 4

Pillars of Success:
Strengthening Footprint, Infrastructure & People

Saudization: Shaping a Nationalized Health Workforce



As Saudi Arabia advances its Vision 2030 goals, the nationalization of the healthcare workforce—known as Saudization—has become a strategic imperative. The Kingdom is accelerating efforts to increase the participation of Saudi nationals in healthcare professions, with clear regulatory mandates and industry-wide support shaping a more self-reliant, resilient, and sustainable healthcare system.



“Regarding long-term, sustainable healthcare, the nation is nationalizing. An increasing number of Saudis are serving as doctors and in other high-level government positions,” said **Diederik Kok**, Head of GCC, Biogen GCC, Saudi Arabia.

The Ministry of Human Resources and Social Development (MHRSD) has set new Saudization targets for 2025, which will be implemented in phases. These include localization quotas of 80% in physiotherapy and therapeutic nutrition, 70% in laboratories, and 65% in radiology. These requirements will first apply to major urban centers by April 2025 and then extend nationwide by October. While these mandates bring pressure to comply, they also reflect the Kingdom’s broader vision: to cultivate a highly skilled local workforce capable of leading national healthcare innovation.

This transformation is not happening in isolation. Decades of strategic investments in education, international training, and healthcare infrastructure have prepared the ground.

“Saudi Arabia has invested heavily in education over the years, especially in preparing for Vision 2030. Well before its official launch, the country sent many healthcare professionals abroad to countries like the US, Canada, and Germany to learn from the best. This strategic move has created a highly skilled and educated workforce of healthcare professionals and government authorities, who are now playing a critical role in advancing the nation’s healthcare system,” said **Khaled Sary**, General Manager of Takeda’s West Gulf Cluster. *“Saudi Arabia’s strong economy, skilled workforce, and growing demand for innovation make it an opportune time for us to establish deeper syner-*



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gies. Our focus goes beyond providing products; it encompasses enhancing patient care and raising healthcare standards across the country.”

Pharmaceutical and life sciences companies are responding by integrating Saudization into their core strategies, not just as a compliance exercise but as a path to long-term success.



“Our strategy has focused on a dual approach: competing in the market to secure the right external talent while simultaneously investing in the development of our internal talent pool,” shared **Khaled Belghoul**, PhD, General Manager KSA & UAE at Astellas. “We have implemented mentorship programs that pair experienced professionals with young Saudi talent to accelerate their growth and readiness for leadership roles. This approach has been instrumental in our success across key projects and initiatives, particularly in maintaining and expanding our market share.”

Pfizer Saudi Arabia has made leadership development and gender equity a strategic priority, aligning closely with Vision 2030’s emphasis on female workforce participation.



“In line with Saudi Arabia’s Saudization efforts under Vision 2030, our aim is not just to hire Saudi talent but also to place them in impactful roles. We are also leading in women’s empowerment,” said **Mohamed Fawzy**, Country President, Pfizer Saudi. “To address this, Pfizer Saudi launched the Women in Leadership program, designed

to fast-track the growth of talented Saudi women by building their skills and giving them the tools they need to take on leadership roles.”

For some companies, embracing local talent has already yielded measurable success.

“Saudi Arabia’s encouragement to integrate local talent into multinational companies is particularly exciting. Lundbeck embraces this opportunity, recognizing the exceptional potential of the ambitious Saudi pharmacists. By fostering a forward-thinking and committed leadership team to guide this talent, the company has seen extraordinary results since starting my journey in end of 2021.”

Beyond hiring, many industry leaders are also investing in skills development to build long-term capacity in the Saudi market. “Beyond our daily business operations, we are also committed to skills development and competency building within the market,” said **Andrzej Bekisz**, former General Manager, Haleon, Saudi Arabia. “Many companies now share our perspective on Saudi Arabia—seeing it as a promising and strategic place to invest. This has led to an influx of both businesses and talent, making the market incredibly dynamic and fast-growing. For companies looking to expand and for professionals seeking new opportunities, Saudi Arabia is undoubtedly a great place to be.”



At Bausch + Lomb, building local leadership pipelines is a top organizational priority.

“On the internal side of the company, we are deeply committed to developing local talent. We prioritize hiring potential leaders from within Saudi Arabia and nurturing them to become future leaders,” shared **Mostafa Tharwat**, General Manager, Bausch + Lomb Pharma, Saudi Arabia. “This is part of our broader goal to build a high-performance organization where talent can thrive. If we succeed in developing this talent in the right way, it will contribute to creating a sustainable company within a sustainable ecosystem.”



Sanofi, meanwhile, is supporting localization through structured mentorship and academic partnerships designed to accelerate Saudi talent development.

“In Saudi Arabia, we have specific programs to develop local talent, especially as the Kingdom transforms,” said **Preeti Funnani**, MCO Lead and General Manager for Specialty Care in the GCC Region for Sanofi. “We’ve expanded training and mentorship programs for young Saudi professionals, focusing on women. Collaborations with universities and scientific institutions help us nurture future healthcare leaders. One example is Najm, a talent acceleration program that equips young professionals with the skills, mentorship, and hands-on experience they need to become leaders. This directly supports Vision 2030 goals.”



Saudi Arabia’s Saudization journey reflects a strategic shift—one that reimagines the healthcare workforce not just as a delivery mechanism, but as a national asset. As multinational companies adapt and invest in local talent, they’re not only building capacity—they’re becoming active participants in one of the most ambitious national transformation agendas in the world.



At Lundbeck,
We are tirelessly dedicated
to restoring brain health,
so every person can be their best.

LU-SAU-GEN-24-07-1



Saudi Arabia's RHQ Policy: The Gateway to Regional Leadership



As part of its bold Vision 2030 transformation, Saudi Arabia is pursuing a multi-pronged strategy to position itself as the regional business capital of the Middle East and North Africa (MENA). A central pillar of this strategy is the Regional Headquarters (RHQ) Policy, which mandates that multinational corporations establish their RHQs within the Kingdom—specifically Riyadh—if they wish to engage with Saudi government entities.

Launched to boost foreign direct investment, diversify the economy, and generate high-value local employment, the policy took effect on January 1, 2024, making an RHQ in Saudi Arabia a prerequisite for bidding on government contracts. In return, the government offers one of the most attractive incentive packages in the region, including 30-year tax exemptions, 10-year Saudization exemptions, and streamlined visa and licensing processes.

“Saudi Arabia has significantly improved its regulatory environment, making it easier to do business and relocate personnel. However, consistency in policy is crucial. Sudden regulatory changes or unexpected new requirements, such as high reinvestment mandates, can create uncertainty,” noted **Liz Clark**, former Director for Saudi Arabia at the US Chamber of Commerce. *“The regional headquarters (RHQ) policy is a good example; while it has ultimately been successful in attracting companies, its initial rollout posed challenges. Large corporations often have complex bureaucratic processes, making it difficult to adapt quickly to new requirements, and rapid changes like this can pose significant challenges for businesses navigating regulatory landscapes. The motivation behind the RHQ policy was understandable—it aimed to bring more companies into the Kingdom. Initially, there was some uncertainty as companies were unsure how to respond. However, to their credit, Saudi authorities addressed many of these concerns, and now more than 600 companies have officially moved their regional headquarters to the Kingdom.”*

This rapid influx highlights how quickly the Kingdom is becoming a favored destination for corporate leadership functions across the region. The RHQ policy limits direct commercial activity but focuses instead on strategic oversight, coordination, and regional management—in line with Riyadh's growing prominence as a business hub.

Several global healthcare and life sciences companies have already aligned their long-term strategy with the RHQ framework, viewing it not just as a regulatory necessity but as a strategic growth opportunity.

“A key milestone was the launch of our RHQ office in Saudi Arabia. This development reflects our long-term commitment to strengthening our presence in the country and the META region,” said **Ronald Boueri**, Vice President and Managing Director at Olympus Medical Systems EMEA. *“In addition, we have es-*

tablished a local Service Center in Saudi Arabia—an Olympus-certified workshop with the right infrastructure and capabilities to perform repairs locally in the Kingdom. This investment significantly enhances our ability to support customers, improve turnaround times, and sustain long-term market growth from within.”

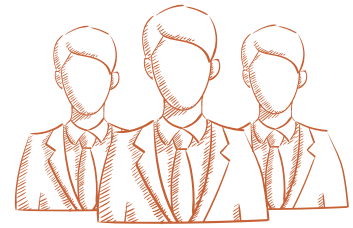
This trend is particularly visible in the pharmaceutical sector. Companies are seizing the RHQ opportunity to localize operations, expand capabilities, and deepen alignment with the Kingdom's healthcare ambitions.

“In 2014, we established our Middle East office in Dubai, and by 2021, we expanded into Saudi Arabia with the opening of a Technical Scientific Office while continuing to collaborate with our local partner, to ensure our products are accessible to more patients in need,” said **Eid Mansour**, General Manager of Gilead Sciences Arabia. *“In 2024, we implemented the strategic decision to establish a direct presence in Saudi Arabia, through the establishment of Gilead's affiliate and Regional HQ in Riyadh. This decision was driven by the country's ambitious healthcare vision, which aligns with our mission of bringing innovation and improving patient outcomes.”*

At Bayer, the decision to move its RHQ to Saudi Arabia reflects both confidence in the business environment and long-term strategic planning across multiple business units.

“One of our most significant milestones last year, alongside opening our office in Jeddah, was the establishment of our Regional Headquarters (RHQ) in Saudi Arabia. This aligns with Vision 2030, which aims to diversify the economy and reduce reliance on oil-related sectors,” explained **Maged ElShazly**, Managing Director of Bayer Saudi Arabia and Country Commercial Lead – Consumer Health. *“The initiative encourages companies to set up regional headquarters in the country, allowing them to serve as non-commercial entities that support other Middle Eastern nations. Bayer was one of the leading companies in establishing its RHQ. Our operating license was approved on January 1, 2024, and serves all three divisions—Consumer Health, Crop Science, and Pharmaceuticals. The country continues to attract investors through various policies designed to encourage multinational companies to invest in Saudi Arabia. The country boasts a stable economy, political environment, and strong government support for investors.”*

Long-Term Growth Through Strategic Presence and Local Manufacturing



The RHQ Policy is more than a compliance mechanism—it is a strategic signal of Saudi Arabia's intent to reshape regional business dynamics and serve as the command center for multinational operations in MENA. By creating an ecosystem that blends regulatory incentives, human capital support, and access to the region's largest economy, Saudi Arabia is inviting global firms not only to operate—but to lead—from the country.

In parallel, the country is also rapidly developing its position as a regional manufacturing and innovation hub. Multinational companies are increasingly responding to incentives and policy clarity by investing in local pharmaceutical and medical production, aligning with Saudi Arabia's ambition to create a self-sufficient, innovation-driven healthcare ecosystem.

"Saudi Arabia, as the largest economy in the region with a population of over 30 million people, has strong demand for these innovations. Many healthcare companies, particularly in specialized areas such as orphan drugs and high-precision medical technology, often operate with a single global manufacturing site. The fact that some are now considering shifting part of that production to Saudi Arabia reflects the potential for both business growth and economic development in the region." – **Liz Clark**, former Director, Saudi Arabia, US Chamber of Commerce.



"An important aspect is the development of pharmaceutical capabilities within the country. Authorities have prioritized local manufacturing of

medicines and vaccines as part of their efforts to strengthen the healthcare ecosystem. This initiative has evolved significantly, with a growing emphasis on fostering research and development within the healthcare and pharmaceutical industries to drive innovation and self-sufficiency." **Khaled Belghoul**, PhD, General Manager KSA & UAE, Astellas.



This commitment is evident in strategic localization partnerships and groundbreaking projects that support both access and resilience across therapeutic areas.

"We've prioritized early and close collaboration with the government, making us one of the first companies to sign agreements for localizing innovative technologies. The announcement of Insulin Local Manufacturing is a step towards ensuring sustainable access to innovative medication by collaborating with several partners like Local Content, SFDA, Ministry of Health and NUPCO to improve access and quality of lives of people living with diabetes. This major milestone shows our commitment to patients, aligned

Driving change | in obesity

Over 68% of the Saudi population is classified as overweight or obese. As a chronic disease, obesity can lead to severe cardiovascular, kidney, and liver diseases.¹⁻⁴



Don't wait for a wake-up call—take action to improve your health today!

Find out more:

<https://www.truthaboutweight.global/sa/ar.html>



with Saudi Arabia's Vision 2030 on Healthcare Sector Transformation to achieve a healthier nation." **Melvin D'Souza**, Corporate Vice President & General Manager, Novo Nordisk, Saudi Arabia.



"Our footprint in the Kingdom includes being the first multinational pharmaceutical company of 100% foreign ownership licensed in Saudi Arabia, a manufacturing site in King Abdullah Economic City (KAEC). Also, to contribute to the knowledge economy in the Kingdom, we established the Pfizer Scientific Institute (PSI) in 2021. PSI's main mission is to enhance local scientific research capabilities and infrastructure through partnerships with key stakeholders in the R&D ecosystem, aiming to drive forward strategic initiatives that support Vision

2030." **Mohamed Fawzy**, Country President, Pfizer Saudi, Saudi Arabia.

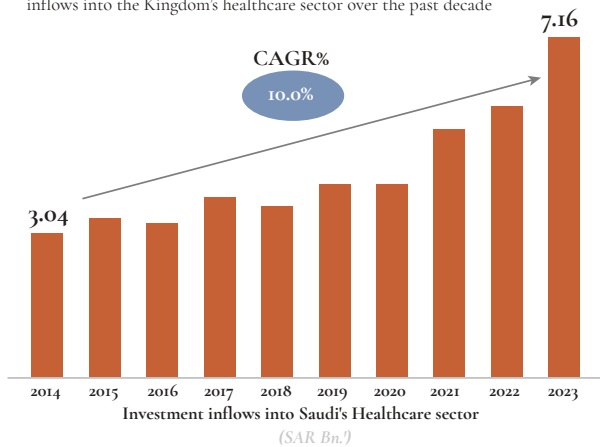


"One of the main priorities is increasing the localization of medical and pharmaceutical supplies, including local manufacturing. At Novartis, we have initiated partnerships with local entities to manufacture key products in Saudi Arabia. While not all brands are localized, we have prioritized essential ones, such as medications for diabetes and hypertension, to ensure they are produced within the country." **Ayman Al Mazloun**, Country President, Novartis Saudi Arabia



US. HEALTHCARE INVESTMENTS IN SAUDI ARABIA

Strategic focus on market expansion and capability building has doubled the U.S. inflows into the Kingdom's healthcare sector over the past decade



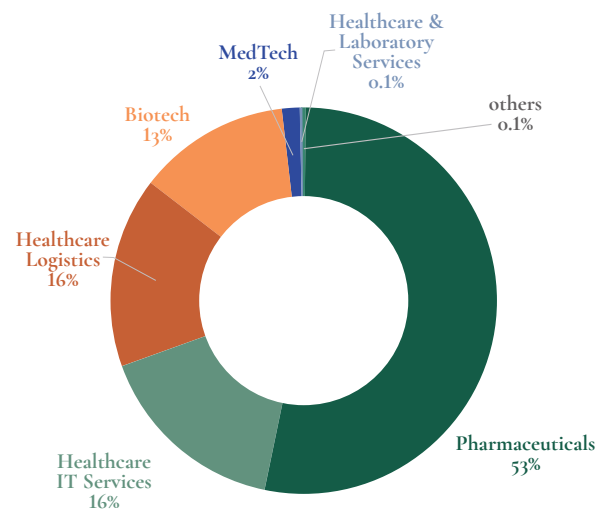
100+
Number of companies

50.9 BN.
U.S. inflows into Saudi's Healthcare 2014-23, SAR

84.6%
Contribution of OpEx to US inflows, 2014-23

Source: AmCham Saudi Arabia

U.S. INVESTMENT INFLOWS IN KINGDOM'S HEALTHCARE BY SECTOR², 2023

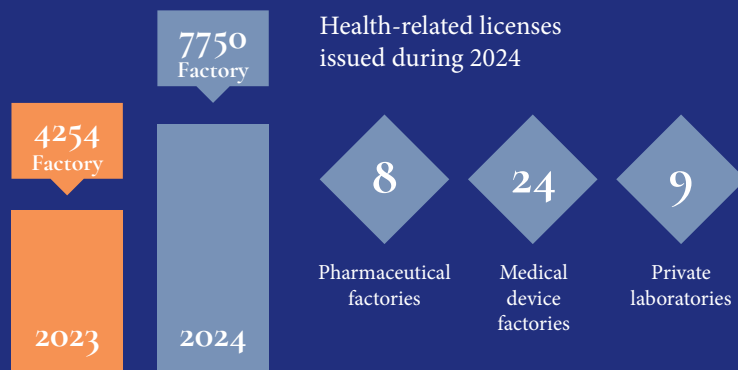


Localization of Health Industries

Record Increase in the Number of Licensed Factories and Warehouses

through a number of efforts and initiatives that contribute to empowering investors and stimulating local industries and localization, in cooperation with relevant government agencies

+80%



Source: Health Sector Transformation Report- MoH Saudi Arabia

Khaled Sary

Takeda

General Manager of West Gulf Cluster



EF: Could you discuss the role of Saudi Arabia as your regional headquarters and your current priorities there?

K: We all recognize the profound advancements happening in Saudi Arabia, particularly in healthcare, as part of Vision 2030. For Takeda, remaining competitive is essential to actively contributing to this transformation within Saudi Arabia's healthcare system as part of Vision 2030. This moment presents an excellent opportunity for us. Takeda's focus on bringing groundbreaking innovations, putting patients first, and maintaining our people- and environment-centric approach aligns seamlessly with the core objectives of Vision 2030. We are well-aligned with Saudi Arabia's evolving needs and committed to supporting the government and authorities in developing and transforming the healthcare system.

From our side, we focus on pioneering innovation, ensuring healthcare access, and fostering a workplace that values talent and environmental responsibility. We are dedicated to contributing meaningfully to the goals of Vision 2030.

EF: How does your portfolio align with Vision 2030, and what are the main growth drivers and priorities in Saudi Arabia?

K: We are a focused company dedicated to advancing innovation in the healthcare system. Our primary areas of focus encompass six key therapeutic fields: gastroenterology, oncology, rare diseases, vaccines, neurology, and inflammation. In these areas, we aim to bring either best-in-class or first-in-class treatments—not just traditional products, but innovative solutions that address significant gaps in care.

In Saudi Arabia, we recognize many growth opportunities, particularly in gastroenterology, inflammation, oncology, and immunology, including blood plasma products. These areas are our primary growth drivers in the region. Additionally, we see significant potential in neurology and vaccines, and as the timing and supply align, we are eager to expand our presence in these areas.

EF: How do you balance resource allocation and attract investment? And why do you believe a dollar invested in Saudi is more valuable than elsewhere?

K: This is truly an excellent opportunity. Saudi Arabia, with its large population, impressive skills and capabilities, and ambitious Vision 2030 goals, aligns perfectly with Takeda's strategic vision. The transformation in infrastructure and healthcare over the past decade has been remarkable, positioning Saudi Arabia as an ideal collaborator for innovation and growth. At Takeda, we are committed to contributing and supporting this transformation. Saudi Arabia's strong economy, skilled workforce, and growing demand for innovation make it an opportune time for us to establish deeper synergies. Our focus goes beyond providing products; it encompasses enhancing patient care and raising healthcare standards across the country. We see many ways to help elevate patient services and improve healthcare standards in the country, making it about more than just the products we provide.

EF: Could you elaborate on how Takeda is advancing patient-centered care and raising standards in the healthcare sector?

K: At Takeda, our core values focus on putting the patient first, followed by trust, reputation, and finally, business. This intentional order signifies our unwavering focus on patient care as the foremost priority. In Saudi Arabia, we actively strive to earn patient trust and build our reputation by partnering with key medical societies, such as the Saudi Gastroenterology Society, the Saudi Hematology Society, and transplant associations. These organizations are dedicated to improving standards of care, education, access, and diagnosis—goals we share and work towards together.

Our collaboration with healthcare authorities and these societies is not just about promoting our products. Instead, we focus on identifying and address-

ing gaps in the patient journey, such as ensuring timely diagnosis, enhancing standards of care, and providing support for patient compliance. We also run patient support programs to help overcome barriers that patients face in accessing high-quality care.

Beyond the product, we aim to enhance the entire healthcare experience. For example, we participate in education programs that extend to remote areas, help establish robust referral systems, and support patient compliance with treatments. Through these initiatives, we are committed to filling gaps in the healthcare system itself, building strong partnerships, and ultimately putting patient needs first.

EF: How do you ensure physicians are well-informed and educated to support the delivery of the new innovations?

K: Saudi Arabia has invested heavily in education over the years, especially in preparing for Vision 2030. Well before its official launch, the country sent many healthcare professionals abroad to countries like the US, Canada, and Germany to learn from the best. This strategic move has created a highly skilled and educated workforce of healthcare professionals and government authorities, who are now playing a critical role in advancing the nation's healthcare system.

Today, with Vision 2030 in full motion, we are collaborating with these capable professionals to address the unique challenges in Saudi Arabia. While the main cities have strong medical capabilities, the remote areas still need more support. Our goal is to leverage the expertise of these highly trained professionals to elevate standards of care, not only in urban centers but also in less accessible regions.

To bridge this gap, we are helping establish centers of excellence in major cities that can train healthcare providers from remote areas. We are also building a referral system to ensure that patients from these regions receive timely and appropriate care in larger cities if necessary. Our collaborative efforts with local authorities are aimed at improving diagnosis, treatment standards, and access to innovation across the country. Thanks to these initiatives, Saudi Arabia's healthcare system has progressed significantly.

Today, the country's medical standards, protocols, and access to advanced treatments are on par with those of Europe and the United States.

EF: With Vision 2030's focus on Saudi Arabia becoming a regional R&D hub, how is Takeda positioning itself to support this goal?

K: Saudi Arabia's top priority is clinical research. Saudi Arabia has made significant upgrades in terms of infrastructure and capabilities, and now the country is well-prepared for phase two and phase three studies. This progress has already enabled us to initiate multiple research projects. While the infrastructure has advanced greatly, we still face challenges, and we are working transparently with the Saudi Arabia Food and Drug Authority and the national research entity to address them. Just last week, we invited the Vice President of Global Health Regulatory Affairs to meet with the SFDA, where they shared updates on their advancements and requirements. We are actively working to encourage our global team to bring more phase three studies to Saudi Arabia. At the moment, we have around five research projects running in Saudi Arabia, and we are aiming to further expand and elevate the quality of these studies. We are closely collaborating with local and global societies in our therapy areas to strengthen our partnerships and support clinical research both regionally and internationally.

EF: What are the key pillars for a sustainable healthcare ecosystem, and what role does talent play in achieving this?

K: The Saudi market is highly competitive, with many opportunities and a major focus on achieving Vision 2030 goals. For long-term success, companies

must add real value—aligning with Saudi Arabia's healthcare objectives, understanding the local dynamics, and actively contributing to their key goals. This involvement is essential for sustaining a strong presence in the market.

“ At Takeda, we prioritize innovation and actively support raising healthcare standards across our therapy areas. We are deeply involved in talent development, education, and research, all of which align with the objectives of Vision 2030. This alignment helps ensure our sustainability in the market. ”

Agility and the ability to make fast, impactful decisions are also crucial to staying competitive. Takeda is highly regarded by local authorities, such as the Ministry of Investment and the Saudi FDA, due to our responsiveness and

proactive actions. For example, we have gone above and beyond by working with the Kingdom of Saudi Arabia in understanding the local burdens and registering products at the Saudi FDA to align Saudi Arabia's priorities with our expertise. Our responsiveness in these situations makes a significant difference. We were also one of the first companies to establish a regional headquarters in Saudi Arabia, and we are committed to local content and economic participation. Our proactive approach to supporting local needs demonstrates our dedication to contributing meaningfully to the Saudi healthcare ecosystem.

EF: Five years from now, when Vision 2030 is completed, what would you consider a great accomplishment?

K: The goal is to be recognized as one of the strongest partners in helping Saudi Arabia achieve its healthcare KPIs as part of Vision 2030. This will make an enormous difference because it will allow us to be involved not just in executing the vision, but also in shaping it. We will not just be following plans—we will be part of making the decisions and guiding the future direction.

This is already happening with the healthcare societies we work with. We collaborate closely to define the goals and vision, and to determine what needs to be achieved. It is not just about helping them reach their objectives, but about actively contributing to building the vision itself. If we can do this with the Saudi authorities, it will be a major accomplishment.

Andrzej Bekisz

Haleon

Former General Manager, Saudi Arabia



EF: Can you elaborate on Haleon's role in Saudi Arabia today and how the spin-off has contributed to its current position?

AB: Haleon plays a significant role in Saudi Arabia's healthcare sector, specifically in consumer healthcare, which focuses on non-prescription medicines. We provide over-the-counter (OTC) medicines and therapeutic oral care products in Saudi Arabia. Our brands, such as Sensodyne for sensitive teeth, Parodontax for gum health, and Corega for denture care, go beyond basic oral hygiene—they actively improve people's health and quality of life. One of our key commitments is promoting self-care. This means encouraging people to take preventive health measures and manage minor health issues, like pain or the flu, without immediately seeing a doctor. Instead, they can visit a pharmacy for advice or choose the right OTC treatment themselves. Given that healthcare professionals in Saudi Arabia—and globally—are often overburdened, shifting more people toward self-care and pharmacy consultations helps reduce pressure on hospitals and clinics. To support this shift, we run various awareness campaigns to educate consumers on how to manage common health conditions, such as pain relief, cold and flu symptoms, and vitamin deficiencies.

“ Our goal is to empower people to make informed health decisions while also contributing to the broader healthcare industry in Saudi Arabia. ”

EF: What are your key missions and priorities for 2025 and beyond?

AB: As a global company, we have a clear purpose: to improve everyday health with a human touch. This mission is the same whether we are in Buenos Aires, New York, or Saudi Arabia. When it comes to Saudi Arabia, we have three main priorities for 2025:

Expanding the Multivitamins Market – We plan to introduce new Centrum multivitamin products to Saudi Arabia, targeting different consumer needs such as specialized formulas for men, women, and children. Saudi consumers are highly responsive to innovation, and we aim to meet this demand with new and effective products.

Advancing Therapeutic Oral Care – We are bringing innovative oral care solutions to the market. For example, we launched Sensodyne Clinical White in Saudi Arabia at the same time as the leading markets in the West. This is the first clinically proven whitening toothpaste specifically designed for sensitive teeth. Saudi consumers appreciate innovation, and we want to be at the forefront of this trend. Additionally, we run the Healthy Saudi Smile initiative, which promotes awareness of oral hygiene and encourages people to take better care of their dental health. This program is not focused on selling products but on educating the public about the importance of oral health. **Improving Pain Management** – Our well-known brands, including Panadol, Voltaren, and Advil, are widely trusted in Saudi Arabia. In addition to distributing these products, we have launched the Pain Management Institute, an initiative aimed at educating healthcare professionals with the latest science on pain treatment. This helps them provide better guidance to patients dealing with different types of pain.

EF: You moved during the pandemic when company was undergoing a full rebranding. What drives you to take on such transformative challenges?

AB: At the end of the day, you have to engage with customers, inspire the team, and drive results. Our team in Saudi Arabia is a unique mix of both local and expatriate employees. What sets us apart from many other markets is that our company holds the highest possible status as a Platinum Employer in the Saudi labor office. This recognition comes from maintaining a workforce where nearly 50% of employees are Saudi nationals, surpassing the required threshold and we enjoy the richness of this diversity.

Our team is truly international, with members from 13 different countries working alongside a strong pool of local Saudi talent. In addition to this, we have also launched an internship program specifically designed to nurture young Saudi professionals. This initiative primarily focuses on female university students in their final year, providing them with valuable experience and skills to prepare them for the job market. Beyond our daily business operations, we are also committed to skills development and competency building within the market. Many companies now share our perspective on Saudi Arabia—seeing it as a promising and strategic place to invest. This has led to an influx of both businesses and talent, making the market incredibly dynamic and fast-growing. For companies looking to expand and for professionals seeking new opportunities, Saudi Arabia is undoubtedly a great place to be.

Ashraf Daoud

AbbVie
General Manager, Saudi Arabia



EF: Why did AbbVie choose to establish its regional headquarters in Saudi Arabia, and how does this decision align with Saudi Arabia's Vision 2030?

AD: Vision 2030 clarifies that partnerships are key to driving progress. One of the most significant partnerships in Saudi has been the establishment of our regional headquarters. AbbVie, as a global company, has the objective to align strategic thinking and collaboration across the region. Saudi Arabia, the most valuable contributor to the MENA region, naturally stands out as the ideal location for such an initiative. With its stability, focus on innovation, transformative policies, and welcoming environment for investment, Saudi provides the right conditions to lead the region in impactful decision-making not just for the country itself but for the entire area. That's why, in 2022, we took the step to establish our regional headquarters here. We were among the first movers, which reflects our ability and innovative company to understand and align with the direction of Vision 2030. We made the right call by partnering with the Ministry of Investment, ensuring we are fully engaged and contributing to the vision. This partnership is the foundation of why we chose to base our regional headquarters in Saudi Arabia.

EF: Could you elaborate on your role in Saudi Arabia, and how are you positioned as a partner of choice helping the Kingdom on their Vision 2030?

AD: Our primary focus is on enhancing patient care by providing services that meet their current needs while fostering opportunities for sustainable growth in healthcare. A key achievement has been our collaboration with regulatory bodies to ensure robust support for innovative medicines and solutions that benefit patients. For instance, the progress made by the Saudi FDA in advancing the regulatory landscape has been instrumental, particularly through initiatives like abridged and fast-track platforms that expedite the introduction of cutting-edge treatments. These efforts align with global standards and enhance access to advanced therapies for patients. By attracting global healthcare investments, we're committed to driving pharmaceutical innovation that prioritizes patient well-being. Moreover, our healthcare strategies, supported by the Ministry of Health, are tailored to improve population health and enhance healthcare delivery, ensuring patients receive high-quality, effective care.

EF: What is special about your portfolio that you're bringing, and what do you see in the future as a decision-maker on what the future of Saudi AbbVie will look like?

AD: AbbVie is a highly specialized company. Our expertise lies in adding value to patients, particularly those suffering from complex and hard-to-treat diseases. These patients' conditions significantly impact their ability to lead normal, fulfilling lives. This is where we truly make a difference.

Our specialization in immunology allows us to treat diseases where the immune system plays a major role. Immunology is a fascinating field because it deals

with the body's immune response, which can be underactive or overactive. To treat these diseases, we use immunosuppressants, which help manage the body's immune response, reducing unnecessary attacks on healthy cells without leaving the body vulnerable to infections. Finding the right balance in immunology is key, and we're proud of our role in this area.

One of our flagship products has been the top-selling product for the past 15 years. And we have continued to develop more advanced therapies focused on enhancing the patient's experience. For example, we've made great strides in patient convenience by reducing the injection frequency from every two weeks to once every three months. In immunology, we have two treatments in our portfolio that represent significant advancements in targeted immunotherapy, providing patients with more precise and effective options for managing chronic inflammatory conditions.

We are also focusing on oncology, particularly blood cancers, and have recently expanded into solid tumors and specifically ovarian cancer through a strategic acquisition. In addition, we've entered the eye care field with our acquisition of Allergan, aiming to improve eye care.

EF: Do you have any final words you want to add?

AD: As Saudi Arabia goes through this transformational phase in its healthcare system, whether through standardization or advancements, it's crucial to truly understand the country's needs during this period.

“ Our role is to support this transformation and help guide it in a way that benefits everyone involved. ”

This is a sustainable opportunity for us, but building a sustainable business model focusing on leadership and talent management is also essential. We must ensure initiatives are in place to develop local Saudi talent, enhance leadership skills, and prepare the next generation for professionalism. Effectively integrating AI and digital tools is key to this transformation. These changes will help increase speed and agility, but talent development is at the heart of it all.

Building a strong local workforce with a collaboration of educational institutions and private sectors to create a steady pipeline of skilled talent; not just any talent, but the right talent with the specific skills needed to manage the future. We must focus on continuous improvement, offering professional development opportunities through workshops, certifications, and partnership programs like MOUs. This ensures the team is equipped with the knowledge and skills to thrive. Focusing on these areas can provide a sustainable future for Saudi Arabia.

Ayman Al Mazloum

Novartis

Country President, Saudi Arabia



EF: With five years remaining until Vision 2030, what are your priorities and decisions in 2025 to support the Saudi Arabia's vision?

AM: I have had a career spanning over 31 years, primarily in the pharmaceutical sector in Saudi Arabia. Over the last five to six years, my focus has been on Novartis, where I have seen significant progress. Vision 2030, Saudi Arabia's ambitious plan to reduce its reliance on oil and diversify its economy, has been particularly relevant to my work. This vision includes transforming the healthcare sector by improving access to healthcare, modernizing facilities and equipment, and encouraging private sector investment. Novartis has been a leading multinational company in Saudi Arabia for over 50 years and is one of the top five in the country. It was also the first company to establish a fully operational legal entity in Saudi Arabia, highlighting its deep commitment to the region. Novartis is deeply rooted in the Saudi healthcare sector and has been part of its evolution for decades. At Novartis, we focus on four key therapeutic areas: Cardiovascular, Renal, and Metabolic diseases; Oncology; Immunology; and Neuroscience. Additionally, last year, we took another significant step by establishing our regional headquarters (RHQ) in Saudi Arabia, further reinforcing the country's importance to Novartis on a global scale.

EF: How is Novartis adapting its global focus on cardiometabolic, immunology, oncology, and neuroscience to Saudi Arabia?

AM: Let me start by highlighting the priorities of the Saudi government and how Novartis is not just meeting these goals but setting new standards for other multinational companies. One of the main priorities is increasing the localization of medical and pharmaceutical supplies, including local manufacturing. At Novartis, we have initiated partnerships with local entities to manufacture key products in Saudi Arabia. While not all brands are localized, we have prioritized essential ones, such as medications for diabetes and hypertension, to ensure they are produced within the country. Another significant priority is attracting investment in advanced therapies, an area where Novartis is leading the way. We have made substantial progress in two key platforms: cell and gene therapy and radioligand therapy. Novartis was the first to introduce cell and gene therapy products to Saudi Arabia. This required significant collaboration with key stakeholders, including the FDA, customs, the Ministry of Investment, and local institutions like King Faisal Specialist Hospital, the Ministry of Health, and the National Guard. Together, we have worked to shape policies and enhance local capabilities, as cell and gene therapy is vastly different from traditional pharmaceutical treatments.

One of our flagship achievements in this space is an oncology treatment used for certain types of leukemia and lymphoma, which brings new hope of a complete cure to patients. Currently, King Faisal Specialist Hospital serves as the only hub for this treatment in the entire Middle East, Africa, and parts of the Far East. This not only builds local expertise but also provides local patients access to treatment at a fraction of the cost compared to sending them abroad. Additionally, this aligns with Vision 2030's focus on medical tourism, as patients from neighboring regions can now come to Saudi Arabia for such

advanced therapies. The second advanced platform we have recently introduced is radioligand therapy, which targets cancer treatment in a novel way. Starting with prostate cancer, this therapy combines radioactive materials with active medicine to deliver highly targeted treatment.

Novartis is prioritizing Saudi Arabia when it comes to the registration and launch of new innovations.

“Novartis has placed Saudi Arabia among the “wave one” countries for most of our innovative products. This ensures that Saudi patients have access to our latest advancements at the earliest opportunity.

By focusing on local manufacturing, investing in advanced therapies, and prioritizing Saudi Arabia in our global strategy, Novartis is demonstrating its deep commitment to supporting the country's healthcare transformation and Vision 2030 goals.

EF: Could you elaborate on the initiatives you are implementing to promote diversity, especially in alignment with the Vision 2030 objectives?

AM: At Novartis, diversity is a core value we deeply prioritize. When we talk about diversity, it is not just about gender—it is about inclusion in every sense. Over the years, we have made remarkable progress. For example, five years ago, female representation in our workforce was nearly zero. Today, it has grown to 35%, which is a significant achievement in such a short time. Additionally, our team now includes employees from over 12 nationalities, demonstrating how far we have come in fostering a diverse and inclusive environment.

Beyond representation, we focus on diversity of thought and inclusion, which are values we actively encourage and promote. When compared to the key performance indicators (KPIs) set by the Saudi government, I believe Novartis stands in a strong, premium position relative to other companies. We have launched several initiatives and programs to support these goals.

EF: With over 31 years of experience in the industry, what are you most proud of?

AM: I focus on prioritizing for success. We cannot do everything like we used to in the past—resources and capital are limited. That is why it is crucial to be selective and focus on areas that will have the greatest impact. If I were to reflect on one thing I have learned over my 30-year career, it would not be about specific achievements or the number of product launches. What stands out to me are two things: first, the patients whose lives I have been able to touch and help heal; and second, the people I have supported in their career growth and development. Many of them are now in senior leadership roles, such as GMs or holding global positions. These are the accomplishments I am truly proud of.

Maged ElShazly

Bayer

Managing Director, Saudi Arabia & Country Commercial Lead - Consumer Health



EF: One year as Managing Director for Bayer in Saudi Arabia. Could you elaborate on your role this past year, and the priorities you are focusing on from the consumer healthcare perspective?

ME: As I reflect on my first year as Managing Director of Bayer in Saudi Arabia, I am proud of the progress we have made and excited about the ambitious path we are setting for the future. We have focused on aligning Bayer's strategies with the national objectives of Saudi Arabia, especially regarding growth in healthcare as well as agricultural and environmental needs. Our journey has been strengthened by our commitment to our mission of "Health for all, Hunger for none", which aligns perfectly with Saudi Arabia's Vision 2030 and the recently published Biotechnology Strategy to improve access to affordable healthcare.

Saudi Arabia has one of the highest rates of cardiovascular diseases in the world. To address this, not only are we collaborating with local authorities and innovative partners to develop and implement comprehensive strategies for heart health, but we have also implemented new technologies for risk assessment, including non-invasive assessment tools that help patients understand their risks.

EF: Could you elaborate on the burden of disease you are addressing in Saudi Arabia, and how Bayer is supporting it in line with of Vision 2030?

ME: Cardiovascular disease presents a significant health challenge in Saudi Arabia, with substantial implications for public health and healthcare resources. It is estimated that the economic burden of CVD would reach USD 9.8 billion in 2035. While some risk factors for CVDs are non-modifiable, other determinants like obesity, hypertension, type-2 diabetes and dyslipidemia can be mitigated by a wide plethora of measures to control CVD morbidity and mortality. One of the key initiatives from this partnership is the Heart Health Risk Assessment Tool, which provides a non-invasive method for rapidly evaluating and predicting cardiovascular disease risk, aligning with Saudi Arabia's Vision 2030 of improved healthcare access. The most significant advantage of this partnership is that it provides a non-invasive method for measuring heart risk factors, eliminating the need for blood tests or other invasive procedures. The system is powered by artificial intelligence and assists patients or consumers in understanding their risk factors. Bayer has launched the partnership with Huma Therapeutics this year, and we are very proud to be the first country in the Middle East to introduce such an important tool and initiative. This initiative is particularly important to me; many families have been affected by heart conditions and strokes, which guided us to act and assume responsibility for making changes. We believe in focusing beyond commercial activities, that is helping and supporting people. Through this milestone partnership with Huma Therapeutics, Bayer significantly contributes to the country by providing innovative treatments, research initiatives, and support to patients. Currently, we are focusing on expanding this initiative across the country.

EF: Could you elaborate on the significance of your operations to the global Bayer Group?

ME: We have three distinct divisions: Consumer Health, Crop Science, and Pharmaceuticals. Each division operates under different business models within our legal entity. One of our most significant milestones last year, alongside opening our office in Jeddah, was the establishment of our Regional Headquarters (RHQ) in Saudi Arabia. This aligns with Vision 2030, which aims to diversify the economy and reduce reliance on oil-related sectors. The initiative encourages companies to set up regional headquarters in the country, allowing them to serve as non-commercial entities that support other Middle Eastern nations. Bayer was one of the leading companies in establishing its RHQ. Our operating license was approved on January 1, 2024, and serves all three divisions. The country continues to attract investors through various policies designed to encourage multinational companies to invest in Saudi Arabia. The country boasts a stable economy, political environment, and strong government support for investors.

EF: Our report focuses on developing sustainable healthcare ecosystems and models. Bayer has global expertise in this area. In your opinion, what are the key pillars of a sustainable healthcare model?

ME: As a leader in the pharmaceutical industry, my vision for shaping sustainable healthcare ecosystems in Saudi Arabia and the broader region is multifaceted. Firstly, I envision a healthcare system that seamlessly integrates cutting-edge technology with local expertise to ensure accessible, high-quality healthcare for all. This involves leveraging digital health solutions, AI, and telemedicine to overcome geographical barriers and improve healthcare delivery. Secondly, I see a future where there's a robust culture of innovation and collaboration between public and private sectors. This collaboration will drive research and development in areas particularly relevant to the region's health challenges. Thirdly, I envision the development of a thriving local biotechnology industry that not only meets local healthcare needs but also contributes to global health solutions, as this will position Saudi Arabia as a leader in healthcare innovation.

“ In Bayer Saudi we have implemented strategic initiatives aligned with Saudi Vision 2030, focusing on sustainability and improving healthcare access. The key aspects of this strategy include exploring local manufacturing opportunities and assessing collaborations with new government entities to establish production facilities within the Kingdom. ”

Chapter 5

Building for the Long Term:
The Future of Health in Saudi Arabia

Saudi Arabia's Global Healthcare Vision



As Saudi Arabia moves decisively into the next phase of Vision 2030, its healthcare transformation is increasingly framed by a future-focused strategy. From regulatory modernization and industrial localization to strategic partnerships and clinical innovation, the Kingdom is laying the foundations not just for a better national health system—but for global relevance and long-term success.



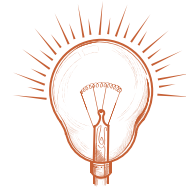
Global Positioning – Investing in the Future

Saudi Arabia's ambition to emerge as a regional and global healthcare leader is underpinned by deliberate, forward-looking investments. The country is attracting top-tier multinational companies not only as service providers but as long-term partners in economic diversification, healthcare delivery, and scientific advancement.

“Sanofi is a proud strategic partner of Vision 2030, and we're committed to bringing innovation, investment, and world-class healthcare solutions to the Kingdom. Our mission goes beyond providing breakthrough medicines and strengthening the entire healthcare ecosystem. We invest heavily in local manufacturing, clinical research, and digital health transformation. True impact comes from a holistic approach. Our commitment to patients and our people is at the heart of everything we do.” **Preeti Futnani**, MCO Lead and General Manager for Specialty Care in the GCC Region for Sanofi



“Success in MedTech and in this part of the world is not given and is not easy. It's not only about building or delivering a strong technology but more about navigating complexities and coming up with solutions, focusing on positive outcomes for patients and stakeholders. Our recent initiatives underscore our commitment to Saudi Arabia's growth and the broader development of the region. Our strategic focus remains on sustainable growth, and we are dedicated to continuous improvement rather than resting on our current achievements. At the end of the day, it's all about outcomes. Our decisions should be focused towards improving patient outcomes, improving patient safety, and improving patients' lives.” **Ronald Boueri**, Vice President, Managing Director at Olympus Medical Systems EMEA



Driving Health and Economic Value Through Innovation

Saudi Arabia's healthcare transformation goes hand-in-hand with its broader economic goals—creating a model where innovation is a lever not just for better care but also for value creation. Pharmaceutical firms, MedTech companies, and biotech innovators are playing a key role in this dual mandate.

“Chronic diseases are a global challenge, but in Saudi Arabia, the scale of the issue demands a strategy tailored to this market. The government's focus on diversifying their economy beyond oil is clear, and localization is a big part of that vision. We aim to build a credible value proposition showing our genuine, long-term commitment. It's about being present, staying practical, and creating a sustainable plan.”

Melvin D'Souza, Corporate Vice President & General Manager, Novo Nordisk, Saudi Arabia



“The Saudi market is highly competitive, with many opportunities and a major focus on achieving Vision 2030 goals. For long-term success, companies must add real value—aligning with Saudi Arabia's healthcare objectives, understanding the local dynamics, and actively contributing to their key goals. This involvement is essential for sustaining a strong presence in the market.” **Khaled Sary**, General Manager of Takeda's West Gulf Cluster





Regulatory Certainty as a Catalyst for Growth

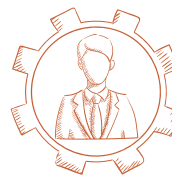
Saudi Arabia's healthcare regulators are proactively modernizing the system to encourage innovation and accelerate access to life-saving therapies. Regulatory clarity, speed, and transparency are now seen as key competitive differentiators.

"The progress made by the Saudi FDA in advancing the regulatory landscape has been instrumental, particularly through initiatives like abridged and fast-track platforms that expedite the introduction of cutting-edge treatments. These efforts align with global standards and enhance access to advanced therapies for patients. By attracting global healthcare investments, we're committed to driving pharmaceutical innovation that prioritizes patient well-being. Moreover, our healthcare strategies, supported by the Ministry of Health, are tailored to improve population health and enhance healthcare delivery, ensuring patients receive high-quality, effective care." **Ashraf Daoud**, General Manager, AbbVie, Saudi Arabia



"Saudi Arabia is making significant improvements. The evolving regulatory landscape can present challenges but also opportunities. Over the past three years, we have seen a rapid introduction of new regulations that reflect the country's dynamic evolution and its shifting requirements. For organizations committed to the market and its patients, adapting to these

regulations is crucial. It is not about waiting for the rules to change or ease but about proactively understanding and navigating them to find effective solutions. Early adaptation is key—being among the first to align with these changes can position a company for success." **Khaled Belghoul**, PhD, General Manager KSA & UAE, Astellas



Developing Human Capital for Enduring Leadership

As the Kingdom reshapes its healthcare infrastructure, it is also cultivating a robust talent pipeline. Investing in local leadership and knowledge transfer is seen as a critical long-term enabler of sustainable progress.

"As Saudi Arabia goes through this transformational phase in its healthcare system, whether through standardization or advancements, it's crucial to truly understand the country's needs during this period. Our role is to support this transformation and help guide it in a way that benefits everyone involved. This is a sustainable opportunity for us, but building a sustainable business model focusing on leadership and talent management is also essential. We must ensure initiatives are in place to develop local Saudi talent, enhance leadership skills, and prepare the next generation for professionalism." — **Ashraf Daoud**, General Manager, AbbVie, Saudi Arabia



Better Health, Brighter Future

Takeda is a global, R&D-driven biopharmaceutical company committed to discovering and delivering life-transforming treatments and vaccines that have a lasting impact on society.

Since our founding in 1781 in a market stall in Osaka, Japan, our values endure by putting patient needs first, building trust with society, strengthening our reputation, and developing the business - in that order.

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Collaboration as a Foundation for Sustainable Impact



One of the Kingdom's most notable strengths is its willingness to engage in public-private partnerships, creating mutual value through collaborative platforms for education, R&D, and policy innovation.

"It's crucial for governments in the Middle East and biotech companies to prioritize public-private partnerships. Regulatory clarity is essential for aligning efforts and fostering collaboration—not only with local companies but also with governments. Our collaboration with Tabuk Pharmaceuticals brings expertise, access, and connections with government entities to ensure streamlined regulatory compliance, pharmacovigilance, market access, and

procurement processes. Our mRNA Access program also enables local researchers to utilize our platform for clinical studies addressing regional health challenges such as Middle East Respiratory Syndrome (MERS)." **Tarek Farahat**, Head of Commercial & Alliances for Middle East & Eastern Europe, Moderna

supportive programs to bring about meaningful change in the society. We have anchored investments to train and build capacity with more than 3,000 healthcare professionals per year on latest developments, cutting-edge research and working on frameworks to manage chronic conditions. Good examples of these visible interventions are through international partners like SCOPE (The Strategic Centre for Obesity Professional Education), building centers of excellence in Ministry of Health and KAUST (King Abdullah University of Science and Technology), and supporting initiatives and guidelines with knowledge-based organizations and societies, such as Saudi Health Council, Saudi Scientific Diabetes Society, Saudi Society for Study of Obesity, etc." **Melvin D'Souza**, Corporate Vice President & General Manager, Novo Nordisk, Saudi Arabia

"In Saudi Arabia, we actively strive to earn patient trust and build our reputation by partnering with key medical societies, such as the Saudi Gastroenterology Society, the Saudi Hematology Society, and transplant associations. These organizations are dedicated to improving standards of care, education, access, and diagnosis—goals we share and work towards together." **Khaled Sary**, General Manager of Takeda's West Gulf Cluster

"Our awareness efforts revolve around engaging conversations with the Ministry of Health, Ministry of Investments, and Ministry of Industry to build

"My message to the sector is one of optimism and commitment. I encourage continued collaboration and innovation to achieve our shared goal of improving healthcare outcomes and contributing to the Kingdom's Vision 2030. Together, we can make a significant impact on the health and well-being of the people we serve." **Islam Jaber**, Regional Managing Director, Abbott's Core Diagnostics Business, Middle East Northeast Africa Region.

Osama Braiwish

Bristol Myers Squibb

General Manager, Saudi Arabia and Gulf Countries



EF: If you were a speaker at the Davos World Economic Forum, what key message would you convey to the world leaders about healthcare?

OB: Healthcare is at a pivotal moment, where scientific innovation, technology, and global collaboration can redefine patient outcomes. While significant progress has been made in areas like oncology, hematology, immunology, cardiovascular and neuroscience, we must now accelerate efforts to ensure these advancements reach the patients who need them the most.

One of the greatest opportunities in healthcare today lies in harnessing artificial intelligence (AI) and real-world data to transform drug discovery, improve early diagnosis, and optimizing treatment pathways. At Bristol Myers Squibb, we are integrating AI into our research and development to enhance efficiency, reduce drug development timelines, and bring breakthrough therapies to patients faster. However, to fully unlock this potential, global healthcare systems must embrace digital transformation, support regulatory frameworks that ensure responsible AI use while maintaining patient privacy and ethical standards.

Moreover, healthcare innovation should not be limited to treatment alone - it must extend to prevention and early intervention. As we see with our latest advancements in oncology and cardiovascular health, early diagnosis can be life changing. This requires the healthcare systems to prioritize long-term patient well-being rather than short-term cost containment. Saudi Arabia's healthcare transformation is an excellent example of this approach in action demonstrating how investments in infrastructure, innovation, and partnerships can drive meaningful change.

Ultimately, the future of healthcare depends on collaboration. By working together across sectors, we can accelerate access to innovation and build a more sustainable, patient-focused healthcare ecosystem.

EF: As someone who can be seen as an ambassador of Saudi Arabia to BMS, how do you attract resources and advocate for greater investment in the country?

OB: Saudi Arabia is rapidly emerging as global hub for healthcare investment, backed by strong economic growth, ambitious reforms, and a commitment to innovation. As one of the top five fastest-growing economies within the G20, the country boasts a young and dynamic population, presenting a significant opportunity for long-term, sustainable partnership that drives innovation and prosperity.

From a healthcare perspective, Saudi Arabia is on a trajectory to become an \$11 billion market, fueled by an ambitious transformation agenda. The government focus on value-based healthcare and HTA models further enhances the country's attractiveness as a strategic market. Moreover, Saudi Arabia's vision to establish itself as a leading medical hub in the region aligns seamlessly with BMS's mission to deliver innovative medicines to patients.

“BMS's role goes beyond providing medicines; we are actively contributing with regulators, supporting clinical research, and investing in medical education. By aligning our efforts with Saudi Arabia's long-term vision, we are not only strengthening our presence in the region but also playing a key role in shaping its future healthcare landscape.”

Eid Mansour

Gilead Sciences
General Manager, Arabia



EF: It has been a year since you took on this role. Could you walk me through the mission you were given at the time of your appointment or the goals you set for yourself?

EM: Our involvement in Saudi Arabia is longstanding. We've been active in the region for many years, initially collaborating indirectly with local partners since the early 2000s. By 2021, we expanded into Saudi Arabia with the opening of a Technical Scientific Office while continuing to collaborate with our local partner, to ensure our products are accessible to more patients in need.

In 2024, we implemented the strategic decision to establish a direct presence in Saudi Arabia, through the establishment of Gilead's affiliate and Regional HQ in Riyadh. This decision was driven by the country's ambitious healthcare vision, which aligns with our mission of bringing innovation and improving patient outcomes. To achieve this, it is essential to be close to patients, physicians, healthcare professionals, and policymakers. By working closely with all stakeholders, we aim to contribute meaningfully to the healthcare system and address the country's most pressing medical needs.

Our vision in Saudi Arabia is to be recognized as a key player and trusted partner in the country's healthcare transformation.

EF: What upcoming developments in Gilead's pipeline excite you the most?

EM: Gilead has a strong and promising pipeline, with an ambitious goal of delivering more than ten transformative treatments between 2020 and 2030. The company has made significant investments in its future portfolio, focusing on key areas such as oncology, HIV, and inflammation.

In oncology, Gilead is committed to advancing cutting-edge treatments for solid tumors while bringing CAR T therapies to patients with blood cancers. The impact of these innovations is clear, as they significantly improve survival rates and outcomes for patients.

HIV remains another core focus. Gilead has led the field with groundbreaking advancements, developing 12 cutting-edge medicines that helped PWH and reformed the management of HIV. We were able to accomplish revolutionary milestone with the introduction of the first Single Table Regimen aiming to

address adherence challenges and to answer patients' real-world needs. The company continues to push forward, recently introducing a long-acting injection administered once every six months for heavily treatment-experienced patients with HIV. This is a crucial step in addressing remaining unmet needs, even for smaller patient populations.

Gilead remains also committed to addressing hepatitis infections and providing treatment options for patients worldwide. After substantial advancements in developing successful treatments for Hepatitis C (HCV) and Hepatitis B (HBV), which have greatly benefited patients in our region and worldwide, we developed a treatment for chronic hepatitis delta virus (HDV) infection, offering a much-needed treatment option for patients who previously had no approved alternatives. We are also expanding into inflammation, with a treatment for primary biliary cholangitis (PBC). This marks an important step in addressing another area of high unmet medical need.

EF: Looking ahead, what are your key goals for the next five years? What legacy do you hope to build?

“ We aspire to have Gilead recognized as a valued partner in the healthcare system, bringing innovation to support ongoing healthcare transformation in Saudi and making a meaningful impact in the fight against the diseases we focus on. Our goal is to serve communities in the most effective and intelligent way possible to improve their health outcomes and quality of life. ”

Diederik Kok

Biogen GCC

Head of GCC, Saudi Arabia



EF: After spending two years in the GCC, could you provide more details about your approach to Biogen's operations and current priorities, particularly in Saudi Arabia?

DK: About four years ago, I started working at Biogen. I was initially in charge of Biogen's CIS, Russia, and Turkey markets before transitioning to the GCC two years later. Initially, we collaborated with a distributor who handled our products on behalf of the Cambridge-based Biogen headquarters. Biogen then established a direct presence in Riyadh, Saudi Arabia, and Dubai. Consolidating these two groups into a single GCC organization was my primary responsibility when I was appointed to my role.

Saudi Arabia's Vision 2030 is a vision that we believe in, so we established our regional headquarters in Riyadh. The region is extremely interconnected; for instance, physicians from the United Arab Emirates are familiar with their Saudi counterparts, and vice versa; Omani doctors are familiar with Kuwaitis, and so on. As a result, we combined the affiliates into one, which posed an exciting opportunity for growth within the organization as the geographic scope was increased. Evolving in overseeing six Gulf countries is a fantastic opportunity.

Bringing innovation is one of the things we are doing. The Government is making a remarkable effort in educating the sector, and I am proud to aid in educating neurologists, conducting center readiness assessments, and essentially training multidisciplinary teams. We are here to help expand their knowledge about rare diseases and how to treat patients properly.

EF: Could you provide more details about how you envision Biogen contributing to Vision 2030, keeping in mind the recent Global Health Exhibition's focus?

DK:

“The vision of Biogen is very clear: to contribute to the development of a thriving society and increase its longevity.”

While disease treatments are beneficial, the ultimate goal is creating disease cures. Our medication improves people's lives and prevents the progression

of diseases, but our goal is to develop cures for diseases. Prevention is another crucial component. Saudi Arabia began premarital screening, which is an essential first step. Newborn screening is the Kingdom's next step. We know from experience that screening newborns for various genetic diseases would allow for early disease treatment. We would have far better results if a disease could be identified and treated early.

For instance, in the disease area we are working on, spinal muscular atrophy, it is scientifically established that early treatment yields significantly better results than delayed treatment. Couples can avoid many problems through premarital screening. For example, if a risk is identified for when they have children, it is better that they are aware of it and better prepared. We strongly agree with the Government's genetic testing plan. Early disease detection will lead to early treatment.

EF: What are the key pillars of a sustainable healthcare system?

DK: The education of citizens and physicians, initiated by the previous king thirty or forty years ago, is one of the most impressive things in Saudi Arabia. You will notice that Saudis speak fluent English. Most locals completed internships and studied abroad in countries including the US, Canada, and the UK. After spending time abroad, they bring their knowledge and expertise back to their own country. As a nation, is good to have well-educated citizens such as the Saudis.

They are also developing a very robust university program in the interim. For instance, the new pharmacists graduating from Saudi Arabian universities are highly educated and skilled. It begins there; you must have that foundation. Regarding long-term, sustainable healthcare, the nation is nationalizing, and while many foreigners still work there, which is fantastic, an increasing number of Saudis are serving as doctors and in other high-level government positions.

It must continue to grow since it cannot be sustained without the local workers, and the Government is doing excellent work. People are currently receiving their education in the southern region, and they are drawn to Riyadh because of the greater opportunities there. Hopefully, in the near future, more people will stay in the South for work. If not, there will be some centers in the country with first-rate medical care, but there will also be several locations that cannot handle complex medical conditions.

Fadi Ghanayem

bioMérieux

General Manager, Saudi Arabia



EF: What are your priorities, and what is next for bioMérieux Saudi Arabia?

FG: AMR is evolving in Saudi Arabia and has been recognized as a global threat. Many political and health decision-makers across various countries have begun discussing the collective impact of AMR, recognizing it as one of the most significant threats facing future generations. We must act to prevent future generations from suffering. The healthcare industry needs to collaborate with partners to ensure meaningful change. Joint efforts should be undertaken among pharmaceutical companies, IVD firms, medical device manufacturers, and health authorities to address this critical issue. This is the focus of our work, and we collaborate with various authorities and associations, including the local National Microbiology Association, the Critical Care Society in Saudi Arabia, and the Ministry of Health.

Addressing AMR is our top global priority while aligning with the national objectives outlined in Vision 2030. We aim to simplify the process of being closer to patients at the point of care and ensuring that testing labs are nearby to provide prompt results. Raising awareness about AMR and educate on Sepsis Management through our innovative diagnostic solutions. Act now is our message to make sure we can have a positive impact on the coming generations.

EF: What decisions should the entire industry make to collaborate, and what actions must be taken to reverse the situation and positively affect AMR?

FG: As an industrial manufacturer and a pioneering leader in the field of in vitro diagnostics, 75% of our R&D expenditure that is dedicated to AMR. Additionally, it is crucial to provide resources and tools that raise awareness of AMR among medical healthcare professionals and the public. Misuse of antibiotics is a significant concern, and we must take steps to prevent it.

Clinicians need accessible tools to effectively communicate the importance of reducing antimicrobial resistance. Public health officials and healthcare professionals must be equipped to make informed decisions regarding patient care plans and promote community awareness.

EF: The Covid-19 pandemic highlighted the importance of fast and accurate diagnosis, leading to a significant shift in mindset. The accessibility and availability of technological tools have also had an impact. How can we maintain and build on these changes?

FG: COVID-19 marked a significant shift in recognizing the importance of diagnosis stewardship. As our founder Alain Mérieux once said, “without diagnostics; Medicine is blind.” Without a proper diagnosis, treating patients becomes much more challenging, even for experienced clinicians, therefore effective

diagnostics are essential to minimize the margin of error in patient care.

The Saudi government has made considerable efforts, working alongside industry partners to enhance diagnostic quality. We are working on partnership agreement with MoH to create a dashboard to provide a consolidated epidemiological data overview of the connected hospitals through an IT solution. We are conducting research in our labs to develop integrated solutions that will provide valuable results. To support Vision 2030, it is essential to move towards diagnostics stewardship to improve treatment quality, reduce hospitalizations, minimize antibiotic usage, and enhance patient outcomes. A state-of-the-art diagnostic solution would have a positive impact on all these areas.

EF: What are key milestones and goals you're working towards in Saudi Arabia's diagnostic stewardship strategy and antimicrobial resistance efforts over the next few years?

FG: Saudi Arabia is undergoing a significant transformation, and we will keep celebrating all the quick wins we will have while deploying our diagnostic stewardship strategy. Our recent milestone was establishing our regional headquarters in Saudi Arabia which aligns with Vision 2030's focus on healthcare transformation and innovation. We are working closely with the Ministry of Health to introduce and actively deploy multiplex syndromic testing in the majority of MoH hospitals, which we have been developing over the past four years. The multiplex PCR testing would be available next year, marking a significant advancement in our efforts.

“ Our objective is to strengthen our contributions to the healthcare landscape in the years to come as we continue to work to fight against infectious diseases, raise awareness about AMR, and positively impact public health. ”

This remains our main objective, and I look forward to celebrating our progress next year.



A Long-Term Vision Anchored in Value

Saudi Arabia's healthcare transformation is no longer just an aspiration—it is a living strategy, built on tangible reforms, robust partnerships, and a strong commitment to long-term outcomes. As global and local stakeholders align with Vision 2030, the Kingdom is emerging as a platform for innovation, investment, and impactful collaboration across the MENA region. With sustained focus on value-based care, localized production, talent development, and regulatory modernization, Saudi Arabia is not just preparing for the future—it is actively shaping it.

5 Things to Expect in Saudi Arabia's Healthcare Market

1 AI Will Move from Pilot to Practice

Artificial intelligence is no longer just a concept—it's being integrated across diagnostics, drug discovery, workflows, and cybersecurity. Expect broader deployment of AI-driven solutions across public and private sectors, backed by SDAIA, global tech partnerships, and regulatory alignment.

2 Prevention Will Become Policy

Shifting from reactive to proactive care is at the heart of Vision 2030. Expect major investments in early screening programs, wearable tech, and digital health platforms to support longevity, reduce chronic disease burdens, and align with sustainability goals.

3 Digital Health Will Deepen Its Roots

From SEHA Virtual Hospital to the Sehhaty and Tawakkal-

na apps, Saudi Arabia is laying the groundwork for a fully integrated, data-driven care ecosystem. Future growth will include expanded telemedicine, interoperable systems, and e-health tools enhancing both patient empowerment and provider efficiency.

4 Saudization Will Reshape the Talent Landscape

With strict new localization targets in key medical roles, the race is on to recruit, train, and elevate Saudi talent—especially women. Expect talent development programs, mentorship pipelines, and internal mobility to become strategic priorities for both local and multinational healthcare players.

5 Public-Private Synergies Will Accelerate

Saudi Arabia's healthcare transformation depends on tight public-private collaboration. From AI academies to cloud infrastructure, diagnostics platforms, and decentralized data centers, the Kingdom will continue building fertile ground for innovation through cross-sector alliances and regulatory agility.

"Let's continue working together toward shared goals while accelerating innovations for those who need them most." **Tarek Farahat**, Head of Commercial & Alliances for Middle East & Eastern Europe, Moderna

