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Saudi Arabia is not just transforming its healthcare system under Vision 2030—we are reimagining what is possible for human health globally.

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As Saudi Arabia continues its ambitious healthcare transformation under Vision 2030, the Ministry of Health is playing a central role in reimagining the nation's approach to health and wellness. Fahad bin Abdulrahman AlJalajel, His Excellency, the Minister of Health, outlines key milestones in the shift toward a value-based healthcare system, including the creation of the Health Holding Company and regional health clusters. AlJalajel also explores the role of digital health and AI, the expanding impact of Public-Private Partnerships and the Kingdom's strategy to become a global biotech hub by 2040. Additionally, he discusses how Saudization is shaping the healthcare workforce of the future and Saudi Arabia's emerging role as a leader in global health diplomacy.

How does the Ministry evaluate the success of the healthcare reforms under Vision 2030 thus far, particularly the creation of the Health Holding Company and regional health clusters, and what are the next key milestones in reshaping Saudi Arabia's healthcare system?

Saudi Arabia is not just transforming its healthcare system, under Vision 2030, we are reimagining what is possible for human health globally – we are doing things differently, we are not just updating the system but reimagining it entirely.

The health systems of the future will go beyond treatments and provide people with preventive, innovative, value-based care. The healthcare transformation in Saudi aims to shift its health system to become value-based, focusing on prevention rather than treatment, ensuring broader patient coverage and better long-term health outcomes. The Ministry is transforming from being a “Ministry for Sickness” to a “Ministry for Health,” prioritizing early intervention and disease prevention.

The establishment of the Health Holding Company and regional health clusters represent key milestones. The clusters serve as the foundation for a more integrated healthcare system, improving efficiency, enhanced patient-centered care, and decentralized service delivery. The Ministry evaluates success through improved health indicators, patient satisfaction, and operational efficiencies in hospitals and clinics. The introduction of value-based healthcare metrics ensures that reforms are measured by quality rather than quantity.

Looking ahead, the next key milestone is to strengthen the Ministry of Health’s role as a super regulator in the healthcare sector. This will ensure a high level of oversight, transparency, and efficiency, positioning the Kingdom as a leader in global healthcare governance. Further initiatives will focus on expanding digital health, integrating AI-driven diagnostics, and enhancing primary healthcare networks to ensure sustainable and high-quality care for all residents. Fundamentally, the Kingdom is introducing incentives that reward health-conscious behaviour rather than simply treating illness, reinforcing the shift towards preventive healthcare.

With Public-Private Partnerships (PPP) playing an increasingly significant role in healthcare, how is Saudi Arabia ensuring a balance between privatization, affordability, and accessibility while maintaining high regulatory standards and attracting international providers?

Our strong regulatory framework is the bedrock on which our healthcare privatization strategy is built, balancing accessibility and affordability while also enabling innovation and attracting international providers. Through PPPs, we have encouraged private sector investment in hospitals, clinics, and medical supply chains. Our long-term goal is to foster investment and innovation without compromising quality.

In total, the Kingdom is driving around USD 40 billion in healthcare investments. We understand how essential private sector participation is for sustainable healthcare growth, particularly in infrastructure development. The ongoing separation of healthcare provision and payment

mechanisms is helping to push the system towards value-based care, ensuring long-term sustainability and improved service quality.

With over USD 65 billion planned for healthcare investments and the sector expected to drive Saudi Arabia’s stock market growth, what are the key focus areas for investment today?

Our healthcare system offers unmatched opportunities for businesses, investors, medical professionals, researchers, and students. With strong government and private sector investment and collaboration we want to make the Kingdom the premier global destination for investment, innovation and excellence in healthcare.

We are creating this environment through a single government approach under Vision 2030, supported by regulations that support investment in innovation, and building a healthcare system that unleashes the power of digital solutions and artificial intelligence and attracting the best talent from around the world.

Investment opportunities in the sector are growing, in fact, the Kingdom ranks the highest in the region in healthcare investments per capita. In recent years, we’ve had great success stories, such as the IPO of Dr. Sulaiman Al Habib Medical Services Group and the offering of Fakeeh Care Group – the largest IPO in the Saudi market of 2024.

We are also seeing significant growth in the pharmaceutical sector. With a compound annual growth rate of 9.3 percent we expect it to be worth over SAR 58 billion by 2027, making it the fastest-growing pharmaceutical sector among the G20 countries. It is also expected that the medical devices market in the Kingdom will exceed 80 billion riyals by 2030, especially since the Kingdom holds the largest share of the regional medical devices market.

Similarly, the commercial health insurance sector is also witnessing significant growth. In 2011, only 3 million people were insured, while last year the number rose to more than 12 million, and it is expected to cover 50 percent of the population. In order to keep pace with this, the market size is projected to reach SAR 190 billion by 2030, reflecting the substantial development in healthcare provision and the increasing involvement of the private sector.

How is Saudi Arabia leveraging digital health and AI to transform patient care, diagnostics, and hospital management, and what lessons have been learned from initiatives like SEHA Virtual Hospital and the National Platform for Health and Insurance Exchange Services (NPHIES) in enhancing healthcare efficiency and accessibility?

Our SEHA Virtual Hospital was recognised by the Guinness Book of World Records as the largest in the world. It is a global benchmark in telemedicine, improving access to specialized healthcare by connecting remote areas with top-tier medical expertise. Powered by AI and digital innovations, it is also representative of our wider digital transformation. We are committed to using the resources available to us to drive forward innovation. Another example is NPHIES, which has streamlined data exchange between patients, practitioners and insurance providers, improving operational efficiency and patient outcomes.

SEHA and NPHIES are lessons in the extent of what's possible. With over 30 million transactions processed through NPHIES—something unimaginable just a few years ago—Saudi Arabia has proven the potential of digital transformation in healthcare. These advancements enhance efficiency, and resource utilization, which is essential to ensuring affordable care and sustainable growth in the sector.

As Saudization policies increase local employment requirements in healthcare professions, what strategies are in place to ensure a skilled workforce, and how is the government preparing healthcare professionals for AI, biotech, and digital transformation?

Saudization is essential for building a sustainable and long-term supply of skilled health workforce. A key component of this effort is the expansion of training programs. The Saudi Board programs have been instrumental in raising the competence of healthcare practitioners. They are a clear signpost of our commitment to supporting human capital and investing in local and international talent. Over the past 30 years, these programs have grown to include more than 170 health specialties, with the number of available seats increasing by over 120 percent since 2016—from 3,150 to more than 7,000 this year.

Our partnerships with leading universities and biotech companies worldwide include scholarships and specialized training programs to equip professionals with the skills needed to provide healthcare in the 21st century, such as training in biotechnology. The Saudi Biotech Investment Forum, which hosted 90 presenters and numerous accelerator programs, has played a vital role in

fostering innovation and workforce readiness.

To future-proof the healthcare workforce, we are also integrating advanced technologies into medical education. Curricula now include genomics, and personalized medicine, sharing knowledge on the latest medical breakthroughs like the use of CRISPR technology to treat beta thalassemia. We also ensure collaborations with leading biotech firms and digital health companies to facilitate knowledge transfer and offer hands-on experience. This holistic approach to healthcare education is positioning Saudi Arabia as a leader in global healthcare training and workforce development.

What progress has been made in moving toward a value-based healthcare model in Saudi Arabia, and how is the government expanding early disease detection, screening programs, and preventive care to improve long-term health outcomes?

The value-based model is holistic, with support and engagement needed from every area of the healthcare sector to succeed. We are making demonstrable progress in shifting towards a system where patient outcomes are considered over service volume. We're achieving this through a range of initiatives focusing on preventative care, such as extensive screening programs, early disease detection initiatives, and significant investments in preventive care. I'm proud to say that our National Screening Initiative and expanded vaccination campaigns have already contributed to improved long-term health outcomes.

A defining feature of Saudi Arabia's transformation journey is our holistic approach—restructuring not only healthcare provision but also payment models, supplier engagement, and the broader healthcare ecosystem. Unlike many nations, Saudi Arabia is overhauling the entire framework, empowering individuals to take an active role in managing their health. The Saudi Model of Care is built on three interconnected levels: population health, individual and community well-being, and family-centric care—reflecting the Kingdom's cultural and social values.

This value-based care model was highlighted during our G20 presidency, when we launched the Global Innovation Hub for Value-Based Healthcare, a commitment that has been renewed in Brazil last year. We are proud to lead this initiative by hosting its secretariat and funding its advancement as value-based care and patient-centric innovations are the cornerstone of our health sector transformation.

Our focus areas include wellness promotion, early detection, and improved health literacy. We have adjusted our performance measurements to focus on outcomes that matter most, such as life

expectancy, quality of life, and patient experience. In fact, Saudi Arabia was one of the few non-OECD nations—and the only Arabic country—to participate in the OECD's Patient-Reported Indicator Surveys (PaRIS) Project. We believe that patient-centric care is the most valuable way care should be implemented.

Much of this progress in providing value-based care is only possible thanks to the digital transformation that has happened in tandem. Digital technologies are a crucial enabler, providing real-time data to track progress, and enhance health care. By integrating technology, fostering a culture of health ownership, and committing to international collaboration, Saudi Arabia is positioning itself as a leader in value-based healthcare innovation, offering a benchmark in best practice to the world.

With the National Biotech Strategy aiming to make Saudi Arabia a global biopharmaceutical R&D hub by 2040, what key investment and policy measures are driving this goal, and how is the Kingdom attracting international partnerships in biotech and clinical research?

Our National Biotech Strategy aims to do more than simply make us a global leader in the biopharmaceutical space, it facilitates breakthroughs and innovations on a global scale. A key example of this was the SFDA's landmark approval of CRISPR-based gene therapy. Last year we treated a 13-year-old with beta thalassemia and now, after years of weekly blood transfusions, she can live a life without them. After years of clinical trials, Saudi Arabia was the first country to use this technology outside of clinical trials.

In tandem to facilitating these domestic successes, the National Biotech Strategy is creating a policy framework that allows innovation to flourish. We reward international R&D investment by providing the largest multipliers for global biotech firms engaging in Saudi-based development.

International partnerships play a vital role in this transformation, and we are proud to be working closely with global biotech accelerators. At the Global Health Exhibition last year, an agreement was signed with BioLabs in Boston to launch a local accelerator in 2025, which marks a major step in localizing biotech R&D. As part of our National Biotech Strategy, the Kingdom will also host its first-ever national pavilion at the Bio International Convention in Boston in 2025, showcasing our commitment to global biotech leadership.

Looking beyond Saudi Arabia’s borders, how is the country positioning itself as a leader in global health diplomacy?

Saudi Arabia is acting as a global health bridge – bringing nations, innovators and expertise together to address pressing international health challenges. We want Saudi Arabia to be the home of where global health challenges are not just tackled but overcome.

The Kingdom has played a pivotal role in global vaccine distribution, funding pandemic preparedness initiatives, and strengthening healthcare systems in developing countries. Through strategic partnerships with the World Health Organization and regional health alliances, Saudi Arabia is actively contributing to global health security and resilience.

A key area of focus has been the fight against antimicrobial resistance, where Saudi Arabia is championing global efforts to combat this growing threat. The Kingdom hosted the 4th Global High-Level Ministerial Conference on AMR in Jeddah last year where the Jeddah Commitments opened a new chapter in global efforts to address AMR, building the coalition of the willing into a powerful force to turn the tide against AMR, with new commitments to a regional Antimicrobial Access and Logistics Hub and new AMR Biotech Bridge.

As the Kingdom continues its healthcare transformation, we remain dedicated to shaping the future of global health policy, fostering international partnerships, and driving innovative solutions that benefit communities worldwide.

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