EXPLORE THE UAE HEALTHCARE SECTOR
THE UAE GOVERNMENT IS INVESTING EXTENSIVELY TO BECOME A WORLD-CLASS HEALTHCARE DESTINATION

To reach its vision to become a world-class healthcare destination and match international standard, the UAE government is investing comprehensively in infrastructure, know-how, and services.

With a total of 10,7 BN USD and 1569 USD per capita, the UAE has the second highest healthcare spending in the GCC.

The UAE alone accounts for 26% of the total healthcare spending compared to neighboring GCC governments.

To cater for the growing population of the country, the demand for hospital beds is expected to increase by 3% every year to reach more than 13,800 beds by 2020.
Growing population and increased cost of treatment drives the GCC healthcare market that is estimated to grow with 12.1% every year from an estimated 40.3 BN USD in 2015 to 71.3 BN USD in 2020.

However, due to falling oil prices the GCC governments’ budgets are coming under pressure and a prolonged low oil price may influence and put restrain on government spending.

The falling oil prices are on the other hand opening up for international private sector players to enter the GCC healthcare market, following the privatization trend that also forces the governments to strengthen their ties with private companies.
There is need for additional healthcare professionals to meet the requirements

A reason to current low key health indicators in the UAE is the fact of shortage of local talent.

Another challenging factor is the high dependence on expatriates, who consider the GCC healthcare facilities as a stepping-stone to gain experience and then seek careers in Western countries.

Considering the capacity master plans developed by each emirate of the UAE, the need for additional physicians to meet the healthcare requirements of the increasing population is expected to be significant.

Internal medicine, general surgery, anaesthesiology and radiology are likely to be the key growth fields within the distribution of physicians in the UAE.

Source: Business Sweden Analysis, Technavio, DHA, HAAD, MOH
“THE UAE IS TO BECOME THE LEADING HEALTHCARE DESTINATION IN THE REGION”

DR. ABDUL RAHMAN MOHAMMED AL OWAIS, UAE MINISTER OF HEALTH AND PREVANTION
HEALTHCARE AS ONE OF THE MAJOR FOCUS AREAS TO ACHIEVE THE UAE VISION 2021

High population growth and increase of lifestyle diseases require foreign equipment and expertise

- UAE is one of the fastest growing populations worldwide with 9% annually
- UAE ranks 2nd in the world with population suffering from diabetes and 70% suffers from obesity
- The MoH is planning to invest a vast amount to prevent lifestyle-related diseases, such as diabetes
- UAE depends on imports up to 93% of its medical equipment demand and is an attractive destination for imports as it has the lowest import duties in the region

The UAE Government Strategy 2011-2013 comprises health care as one of the major focus areas to achieve the UAE Vision 2021

- The UAE government aims on transforming the country to a center of healthcare excellence in the Middle East
- Compulsory health insurance for the entire population is currently implemented in Abu Dhabi and Dubai
- Hospitals lack medical technology thus healthcare facilities are encouraged to attain higher levels of IT adoption to improve patient safety and provide quality care

Privatization and medical tourism will enhance UAE’s position as the leading healthcare destination in the region

- The UAE is working to keep local patients from travelling elsewhere for treatment - and boosting the medical tourism sector of competing countries
- Increasing collaborations between health authorities, private organizations and key government departments and encouragement of adoption of PPP-models
- Private healthcare providers show a significantly larger share of the UAE market

SOURCE: UAE CABINET, BMI UAE PHARMACEUTICALS & HEALTHCARE REPORT, NOOZZ.COM, UAE MOH, UAE GOVERNMENT STRATEGY PLAN 2011-2013
A RANGE OF ONGOING E-HEALTH INITIATIVES BRINGS BUSINESS OPPORTUNITIES FOR SWEDISH COMPANIES

2,900+ integrated public & private health care facilities

Dubai

Central Command Centre

One of the largest integrated electronic patient information systems in the Middle East

DIGITALISATION INITIATIVES

SALAMA (EMR) Aims to create one e-record for patients across public hospitals in Dubai

NABIDH (EHR) Extend the Salama to Dubai private hospitals and integrate e-records, including 15 programs with 96 initiative. Ongoing discussions with mobile operators for a PPP-model.

NUMR Will be linked to the National Unified Medical Record (NUMR) on initiation by the Ministry of Health and Prevention.

TELEMEDICINE

“UAE residents tend to make approx. 4-14 visits to clinics per year. A great proportion of these medical issues can be solved remotely”

Dr Sameera Al Obeidli, Abu Dhabi Telemedicine Centre

“Satisfaction and happiness of the patient drives all projects and activities in the Emirate of Dubai. The meaningfulness of usage of the technology is important”

Dr Mohammad Abdulqader Al Rehda, Director Health Data Information Analysis Department

REST OF THE COUNTRY

There are plans in place for 35 healthcare projects spread across the Northern Emirates
UAE HEALTHCARE SECTOR IS REGULATED AT BOTH FEDERAL AND EMIRATE LEVEL

FEDERAL LEVEL

MoHAP
Ministry of Health and Prevention
H.E. Dr. Abdul Rahman Bin Mohammed Al Owais

- Regulates UAE’s federal healthcare laws
- Approves all import and registration of medical devices and pharmaceuticals
- Regulatory body of healthcare services in the Northern Emirates

EMIRATES LEVEL

DHA
Dubai Health Authority

- Regulatory body of healthcare services in Dubai, including those in free zones.
- Healthcare assets and professionals in Dubai licensed by DHA

HAAD
Health Authority of Abu Dhabi

- Regulatory body of healthcare in Abu Dhabi
- Mandate to develop the healthcare sector and related policies in Abu Dhabi

SEHA
Abu Dhabi

- Abu Dhabi Health Services Company is a public joint stock company owned by Abu Dhabi government
- Responsible for operating public healthcare assets

2 GOV. INSURANCE COMPANIES

Dubai Healthcare City

LARGEST HEALTHCARE FREE ZONES
- 100% foreign ownership
- 100% tax-free

Dubai Biotechnology and Research Park

3 GOV. INSURANCE COMPANIES

SOURCE: MOH UAE, BMI UAE PHARMACEUTICALS & HEALTHCARE REPORT Q3 2012, BUSINESS SWEDEN INTERVIEWS, ALPEN CAPITAL HEALTHCARE SECTOR REPORT 2011, SEHA
BUSINESS SWEDEN CAN ACCELERATE YOUR ESTABLISHMENT AND GROWTH IN THE MIDDLE EAST

BUSINESS SWEDEN’S PURPOSE IS TO HELP SWEDISH COMPANIES REACH THEIR FULL INTERNATIONAL POTENTIAL. WE OFFER OUR CUSTOMERS STRATEGIC ADVICE AND HANDS-ON SUPPORT

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<td>Find partners on the UAE market to help in your entry and expansion</td>
<td>Describe market structure, identify market size, trends and analyze market access channels</td>
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<td>Evaluate and establish local presence</td>
<td>Identify, evaluate and rank potential partners according to pre-set criteria</td>
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<td>Arrange and perform meetings with key stakeholders in the UAE</td>
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<td>Free zone analysis or establish local presence</td>
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