AUSSEN WIRTSCHAFT BRANCHENREPORT VEREINIGTE ARABISCHE EMIRATE UND OMAN

GESUNDHEITSSYTEM & EINRICHTUNGEN

BRANCHE UND MARKTSITUATIONEN
MARKTSEGMENTE UND TRENDS
CHANCEN FÜR ÖSTERREICHISCHE UNTERNEHMEN
MARKTEINTRITTSTRATEGIEN

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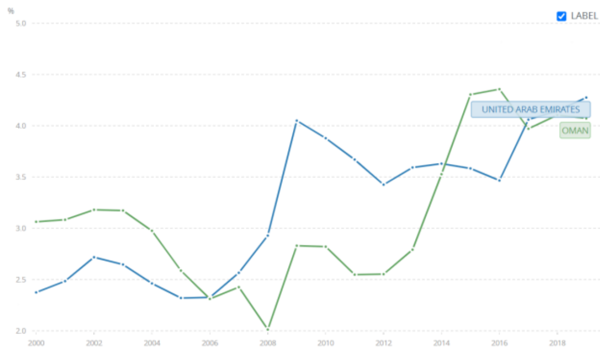
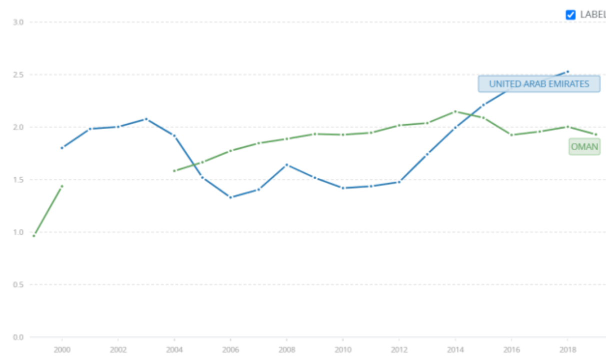
KEY FIGURES OF THE HEALTH INDUSTRY IN THE UAE AND OMAN

Current health expenditure (% of GDP)



Source: Worldbank 2022, https://data.worldbank.org/

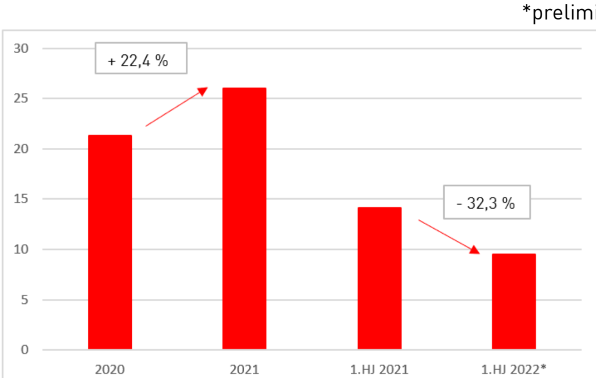
Physicians (per 1,000 people)



Source: Worldbank 2022 based on WHO and OECD, https://data.worldbank.org/

Export of pharmaceutical products from Austria to UAE (in million EURO)

*preliminary



Source: Statistics Austria

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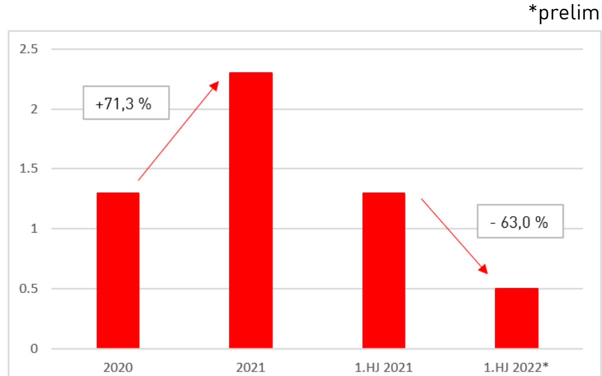

Source: Statistics Austria

I) UAE

1. INDUSTRY AND MARKET SITUATION

1.1 Overview

As one of the most economically developed and diversified markets in the Middle East, the United Arab Emirates (UAE) has a strong healthcare infrastructure. The creation of a world-class healthcare sector is a top priority for the UAE, not only since the COVID 19 crisis, and the sector has advanced and expanded significantly in recent years. According to the World Health Organization, a third of adults in the UAE are obese, and one out of five people live with diabetes. As the incidences of life-style diseases increase, these populations, supported by relatively high levels of income, continue to demand greater quality healthcare. The government has focused on developing healthcare infrastructure to address this demand.

Both, federal and emirate-level governments regulate healthcare in the UAE. Federal-level legislation began in the 1970s and 1980s and there are pending legislative reform initiatives to facilitate the development of the healthcare industry. The UAE Government is liberalizing policies to attract foreign investments to improve the healthcare standard and boost the healthcare industry.

The UAE's health expenditure reached a value of $ 15.5 billion (Dhs 57.0 billion) in 2019. This includes healthcare expenditure from the seven emirates in addition to their contribution to the federal budget. The forecast for spending is to rise to $ 20.5 billion (Dhs 75.3 billion) by 2024, which is a compound annual growth rate of 5.7 %. A 10-year forecast to 2029 has health expenditure expected to rise to $ 29.2 billion (Dhs 107.1 billion). Overall healthcare spending is expected to account for 5.1 % of the country's GDP by 2029, gradually increasing from 3.7 % in 2019, according to Business Monitor International (BMI).

The government commitment to the healthcare sector is one of the key drivers of growth within the UAE's healthcare market, particularly given that public spending accounts for over two thirds of overall healthcare expenditure. In the 2020 federal budget, a total of Dhs 61 billion was approved for public spending, up only 1.2 % from Dhs 60.3 billion from the 2019 budget. While this does not constitute total government expenditure in the UAE, which derives from overall spending at the respective Emirate level, it is, nonetheless, a solid indicator of the UAE's fiscal stance. As such, the federal government has made fiscal consolidation a priority over the past two years, in part a result of slumping oil prices.

In June 2015, the UAE government launched a health insurance program in Dubai to support nationals not covered under any other government funded health insurance scheme. This scheme benefited around 130,000 by offering healthcare at 23 private hospitals and more than 500 medical clinics in and around Dubai. The Dubai Health Authority (DHA) announced in June 2016, that all Dubai residents should be covered by health insurance and this will be tied to the renewal and issuance of their UAE residence visas.

The UAE government wants to boost the number of medical tourists coming to the UAE in order to establish Dubai as a center of healthcare excellence in the region. The country has a robust transportation and logistics infrastructure and is geographically well positioned to be the center of the transportation network that links the economies of India and China to Europe and the United States. Healthcare will remain a priority sector for the UAE government in light of the global COVID pandemic, and the UAE will continue to be an attractive location for establishing a regional distribution center for medical devices.

1.2 Recent Industry Developments

In December 2019, the DHA and VPS Healthcare signed a MoU to facilitate knowledge transfer, exchange experiences and strengthen collaboration in key healthcare areas. The move is in line with the Authority's strategy to work in partnership with the private sector to ensure the delivery of high-quality specialized health services in the Emirate and to ensure patient-centric care.

In April 2020, UAE published the 'Positive List' under the FDI Law which allows for 100 % ownership in healthcare segments including hospital activities and pharma manufacturing. The Department of Health (DoH Abu Dhabi) established a new licensing system for companies with a new tool called Certificate of Need, which is a self-service tool to identify a possible demand for specialties in the region.

In June 2020, American Hospital Dubai launched the first AI research center in the region in partnership with Cerner Corp. The center aims to leverage Cerner's Electronic Health Records data along with its clinical AI and advanced data analytics tools to create a center of excellence for oncology, infectious diseases and bariatric medicine.

According to Dubai Customs, the value of Dubai's pharmaceuticals and medical supplies trade alone reached Dhs 6.8 billion (US$ 1.9 billion) in the first quarter of 2021—a 31 % rise year on year, while volumes rose by 47 % in the same period. Importers account for the bulk amount, however re-exports and exports are gaining significance too.

In September 2021 the Department of Health (DoH) has announced that Abu Dhabi is adopting advanced drones to distribute and transfer medical supplies within the healthcare sector. The project is a collaboration between the DoH, the General Civil Aviation Authority (GCAA), SkyGo and Matternet and aims to leverage existing advanced infrastructure in order to transform healthcare logistics. The goal is to use drones to deliver medical supplies, medicine and blood units, vaccines and samples between laboratories, pharmacies, blood banks across healthcare facilities around the city in a safe manner.

2. MARKET PARTICIPANTS

2.1 Public Health Sector

The public healthcare sector in the UAE has a large network of hospitals and speciality clinics. There are no restrictions on who is allowed to use public facilities, Emiratis as well as residents can avail of the public service.

In Abu Dhabi the overseeing authority is called SEHA with 46 clinics and 13 hospitals. Mayor public hospitals in Abu Dhabi are listed below.

Corniche Hospital is the prime hospital for maternity related cases with the best Neonatal Intensive Care Unit (NICU) in the emirate. All other hospitals refer special cases to Corniche Hospital.

Sheikh Khalifa Medical City is a tertiary hospital and the largest teaching medical centre in the heart of Abu Dhabi. It compromises the first transplant center in the UAE, the largest cardiac science program for peadiatrics and the first accredited chest pain center in the region.

Sheikh Shakhbout Medical City
Sheikh Khalifa Medical City

Corniche Hospital
Al Ain Hospital
Al Rahba Hospital

In Dubai the overseeing authority is the Dubai Health Authority with 13 primary health centres, 4 hospitals and 9 speciality centres.

The Dubai Hospital has received several awards and international accreditation and is specialized in, among others, nuclear medicine. It is furthermore a training centre and uses digital patients medical reports.

The Latifa Women and Children Hospital was established in 1987 as the first speciality hospital for obstretics & gynaecology in the country. In 2021, paediatric medical, surgical and emergency services were transferred to Al Jalila Children's Specialty Hospital, converting the hospital into a specialised centre for obstetrics and gynaecology.

Other public hospitals in Dubai are the Rashid Hospital and Hatta Hospital.

2.2 Private Health Sector

There are several different types of health care providers, from clinics, hospitals and different centres, for example dialysis, diagnostic, rehabilitation or fertilization centres. The total amount of hospitals alone in 2017 reached nearly 100 with more than 14,000 physicians and 33,000 nurses, as per the UAE Federal Statistics and Competitive Authority.

Nearly 70 % of more than 4,000 facilities, including hospitals, ambulatory services, clinics, polyclinics, and primary care centers have international accreditation, which will increase in the years to come.

Currently, the major players in the private healthcare market in the UAE include Al-Noor Medical Company, VPS Healthcare, Tumbay Group, Al-Zahra Group, Belhoul Lifecare, Emirates Healthcare, Gulf Healthcare International, Gulf Medical Projects Company, Zulekha Hospital, Saudi German Hospital Group, GE Healthcare, and Aster DM Healthcare. Key players in Abu Dhabi are Burjeel Hospital, NMC Group, Cleveland Clinic and Mediclinic.

Austrian company VAMED, in partnership with Charité, one of the leading University Hospitals in Germany established Reem Hospital in Abu Dhabi in 2020 with a capacity of over 200 beds. Reem Hospital is the first Post-acute Rehabilitation, and Multi-specialty Hospital built to provide quality and world-class care to patients throughout their recovery journey. Vamed will operate the hospital for a period of 20 years.

2.3 Leading Sub-sectors

Pharmaceuticals

As one of the largest, most developed economies in the Middle East, the UAE pharmaceutical market presents significant growth opportunities for multinational drug makers. The expansion of private healthcare coverage and the modernization of health infrastructure will drive prescription market growth. Stricter pricing controls, generic drug substitution, and an unfavorable demographic profile will act as headwinds in the coming years.

Medical Equipment

The projected growth of UAE's medical equipment market broadly mirrors that of other sectors. BMI estimated in 2015 that the medical device market would grow at a compound annual rate of 8.2 % from $ 967 million in 2015 to $ 1.4 billion in 2021. Given that the UAE produces relatively little medical equipment domestically, this means significant business opportunities for international companies.

Healthcare Information Technology

The UAE's Healthcare Information Technology market is set to grow swiftly in coming years. The COVID 19 pandemic continues to create opportunities for the tele-health/medicine sector expansion, driven by remote healthcare services through technology platforms. MoH is working with an Emirates Integrated Telecommunication Company PJSC ("Du") to enhance options for tele based healthcare. These included "Virtual Hospital" where doctors and nurses provide remote care to patients using AI and smart devices.

Education and Research

In order to meet its ever-increasing need for qualified medical professionals, the UAE has sought to grow its nascent medical education and training capacity. At the same time, it has endeavored to make the country a regional hub for medical research and events.

3. LEGAL FRAMEWORK

Any products related to the healthcare sector are strictly regulated in the UAE. The seven emirates have different authorities that are responsible for approval, verification and issuance of licenses. However, the Ministry of Health and Prevention (MOHAP) is the federal health authority that oversees all licensing in the healthcare sector.

Emirate	Authority
Abu Dhabi	Ministry of Health and Prevention (MOHAP) https://mohap.gov.ae/en Health Authority Abu Dhabi (HAAD) or Department of Health (DOH) https://www.doh.gov.ae/en/
Dubai	Dubai Health Authority (DHA) https://www.dha.gov.ae/en Emirates Health Services (EHS) https://www.ehs.gov.ae/en
Sharjah	Sharjah Health Authority http://sha.gov.ae/en/
Umm Al Quwain	n/a
Ras Al Khaimah	n/a
Fujairah	Fujairah Medical District https://fujairah.ae/en/Pages/health.aspx

Ajman	Ajman Healthcare https://www.ajman.ae/en/happiness-bundle/life-ajman/health-care

There are a number of certifications depending on the product category. Food supplements for example are certified by ESMA (Emirates Standardization and Metrology Authority), technical products are registered and certified by the Ministry of Health and Prevention (MOHAP), as well as doctors and practitioners who have to register through MOHAP.

Documents like lab test reports, free sale certificate, label certification, material safety data sheet, ingredient report and good manufacturing practices can be part of the certification process. Companies need to be registered with MOHAP in order to be able to submit documentation.

Therefore, Austrian companies that intend to import products and services need a local company, either through an own entity or through a partner, to be active in the market. The AussenwirtschaftsCenter Abu Dhabi is happy to provide you detailed information depending on your product or service.

4. TRENDS

UAE's Vision and Health Strategies

Providing world-class healthcare is one of the six pillars of the National Agenda in line with Vision 2021. The government will work in collaboration with all health authorities in the country to have all public and private hospitals accredited according to clear national and international quality standards of medical services and staff.
Furthermore, the National Agenda emphasizes the importance of preventive medicine and seeks to reduce cancer and lifestyle related diseases such as diabetes and cardiovascular diseases to ensure a longer, healthier life for citizens. In addition, the Agenda aims to reduce the prevalence of smoking and increase the healthcare system's readiness to deal with epidemics and health risks.

The UAE has set Key Performance Indicators (KPIs) to measure its performance against its targets of 2021. They are:

1) Number of deaths from cardiovascular diseases per 100,000 Population
2) Prevalence of diabetes
3) Prevalence of obesity amongst children
4) Average healthy life expectancy
5) Prevalence of smoking any tobacco product
6) Number of deaths from cancer per 100,000 population
7) Percentage of accredited health facilities
8) Healthcare Quality index
9) Number of physicians per 1,000 population
10) Number of nurses per 1,000 population

Sheikh Mohammed bin Rashid Al Maktoum Fund to Finance Innovation

In November 2015, H.H. Sheikh Mohammed bin Rashid Al Maktoum launched the Fund to Finance Innovation with a value of Dhs 2 billion, which is a federal initiative designed to provide financing solutions for innovators across various sectors within the UAE. Priority will go to renewable energy, transport, education, health, technology, water and space sectors, and applicants must provide a business development plan to be eligible for funding. The fund is managed by Ministry of Finance, in collaboration with local banks and various investment entities.

National Innovation Strategy

In 2014, H.H. Sheikh Mohammed bin Rashid Al Maktoum launched the National Innovation Strategy that aims to make the UAE among the most innovative nations in the world within seven years. The strategy targets seven sectors, similar to the Sheikh Mohammed bin Rashid Al Maktoum Fund: renewable energy, transport, education, health, technology, water and space.

The first phase includes 30 national initiatives to be completed within three years, which include:

- new legislation
- innovation incubators
- investment in specialised skills
- private-sector incentives
- international research partnerships
- an innovation drive within government

The strategy will promote advanced technologies in healthcare services. It will stimulate the growth of the biotechnology and pharmaceutical industries while also working with strategic partners to support medical research.

Health strategies

The UAE's mission is to transform UAE into a leading healthcare destination by fostering innovative and integrated care models and by enhancing community engagement.

As part of this mission, Abu dhabi's Department of Health and Dubai Health Authority have developed a strategic development process involving a broad range of stakeholders from both the DOH and DHA healthcare eco system. These strategies are aimed to lead the UAE to become a global leader in the delivery of healthcare, and providing a world-class level of healthcare.

Some of the primary goals of these strategies have been to drive and ensure compliance and accountability through an Innovative Health Governance Framework, protecting and improving population health, and ensuring patient happiness by providing world-class healthcare services.

The strategic objectives are numerous, namely, positioning UAE as a global medical destination by introducing a value-based, comprehensive, integrated and high quality service delivery system; directing resources to ensure healthy and safe environment for the UAE population; promoting Public and Private collaboration in Healthcare; fostering innovation across the continuum of care; and establishing efficient Decision Support System by ensuring an integrated data platforms.

DHA's ambitious strategic programs

Care Model Innovation: Care Model Innovation Program is designed to promote innovation and efficiency and ensure that Dubai residents and visitors have access to high quality services across the continuum of care, it introduces innovative care models to fill existing care delivery gaps and enable an integrated cost-effective, patient and innovation-oriented care delivery system.

Prevention & healthy lifestyle: This program promotes healthy lifestyle and disease prevention interventions at the level of the community and the individual. It moves beyond a focus on individual behavior and more towards a wide range of social and environmental interventions at the community level.

Public Health & Safety: Health starts with the environment, and this program aims to promote a healthy environment for the Dubai population, as a whole, and for the most vulnerable specifically. It also helps in defining public health standards, policies and guidelines and design organized measures to prevent disease, promote health, and prolong life.

Primary Care: The Primary Care Program is designed to ensure that all the population including the most vulnerable have access to high quality primary care in an equitable fashion and focuses on promoting primary care as an entry point to the healthcare system.

Oral & Dental Care: This program focuses on improving the oral health outcomes and ensure that all individuals have access to high quality treatments and effective prevention programs for dental care.

Mental Health: The Mental Health Program stimulates the development of an ecosystem that ensures that the population of Dubai have access to high quality care (including prevention and promotion) for mental health conditions, and addresses the social stigma associated with mental health.

Chronic Disease Management: This program drives the development of specialty centers that can provide programs focused on the management of chronic diseases outside the setting of acute/tertiary hospitals. Such programs helps chronic disease patients, better manage their conditions and reduce their need for hospitalization and tertiary care treatments.

Centers of Excellence: Centers of Excellence COEs respond to the high demand for specialized and tertiary care for selected high prevalent diseases in UAE such as cardiovascular, cancer, trauma, ophthalmology, neurology, this program also endorses clinical research and training programs in those specialties.

Medical Tourism: This program focuses on promoting the development of medical tourism in Dubai, and position Dubai as a global health tourism destination.

Excellence & Quality: This program promotes excellence in healthcare service delivery in Dubai while enhancing patient happiness, experience, satisfaction and trust.

Governance (Regulation and Service delivery): DHA is undergoing a huge transformation and the governance program aims at improving the governance framework of Dubai healthcare sector. It also aims at strengthening the internal governance structure of DHA, through re-engineering the public service delivery and regulatory functions of DHA.

Medical Informatics & Technology: Technology is inseperable of any leading organization, and this program aims to drive the implementation of an integrated data platform across all public and private facilities in Dubai and to enhance data analytics tools needed for research and decision making policies.

Health Insurance & Financing: This program aims to ensure the successful implementation of health insurance law in Dubai and improve coverage and accessibility to healthcare services.

Investment & Partnerships: This program promotes competitiveness and encourages foreign and domestic investments in the health sector in Dubai.

DOH's ambitious strategic programs

Family and School Health Program: The DoH Schools for Health Program is focused on improving the health and well-being of school students in Abu Dhabi, and is conducted in partnership with schools, parents, teachers and the healthcare sector.

Muashir – Abu Dhabi Healthcare Quality Index: Contributing to its vision of a Healthier Abu Dhabi, the Department of Health launched Muashir – Abu Dhabi Healthcare Quality Index in 2018. Muashir is a unique, comprehensive and reliable quality framework that came as an evolvement from the Jawda programme, which was first launched in 2014. Muashir promotes sustainability, effectiveness of care, transparency, accountability, and enhancing patient experience.

Chronic Respiratory Diseases Awareness Program: Through this program, DOH aiming to improve early detection rates and management of Chronic Respiratory Diseases at both PHC and community levels.
Weqaya Program: Weqaya supports DoH's goal of improving the well-being of the Abu Dhabi population through increased health awareness and preventative healthcare measures.

Abu Dhabi Smiles Oral Health Program: Improving the oral health status of the Abu Dhabi population is one of DoH's key Public Health Goals. It is an area of health that is often overlooked, yet plays an important role in an individual's general health and well-being, as well their ability to eat, speak and socialize.

Medical Education: DoH has issued a Standard defining the criteria that a healthcare facility must satisfy in order to be eligible for accreditation as an Approved Practice Setting.

Continuous Medical Education Facility: There are several programs under this facility. Among the programs are CME Program which include CME/CPD activities accredited by the ME department at the DoH that are for the purpose of increasing health professionals' knowledge, skills, performance and/or patient outcomes, and to assist health professionals with maintenance of re-licensure.

In addition of the plans to increase government budget spending on the health sector, the COVID 19 crisis furthermore highlighted the importance of the utilizization of data monitoring tools (for preemptive digital contact tracing for example) and licensing of virtual medical service providers. The government has also highlighted plans to build national capacities to fight future pandemics, which includes efforts to develop vaccines and medicines, digital immunization ID, and a new strategy focusing on supply chains.

The Department of Health aims to develop the sector by focusing more on Health IT, including telemedicine and digital medicine. Topics of digitalization and virtual medicine gaining significance and are the way forward. Initiatives by the DoH like "The AI Lab", "Malaffi" and the "Research & Innovation Center" feeding into this trend. Data analytics and eHealth are key components in the digital transformation of the healthcare system.

For example, Alaa Adel, managing director, Cerner Middle East and Africa in Dubai says about the collaboration of Cerner with the American Hospital: "(…) This AI research center initiative will not only further enhance AHD's (American Hospital Dubai) response to the COVID 19 crisis but, more importantly, equip AHD with cutting-edge technologies to redefine health and care in the new post COVID 19 pandemic era". The aim is big data analytics to better understand the healthcare needs of the UAE population.

Dubai's Industrial Strategy 2030 plan considers pharmaceuticals as one of six priority sectors, among Aerospace, Maritime, Aluminum and Fabricated Metals, Food and Beverages and Machinery and Equipment. These sub-sectors were chosen based on their future growth prospects, export potential and mid-term to long-term economic impact.

Research

Dubai Science Park, a merger of DuBiotech and Energy and Environment Park (EnPark), facilitates research and development for companies conducting research development in the field of life sciences. It provides excellent laboratories and other ancillary services needed for such work.

The following institutes conduct medical research in the UAE:

Al Jalila Foundation

Al Jalila Foundation conducts medical research and provides medical education and treatment in the UAE. It also offers scholarships in medical studies. It would be the UAE's first independent multi-disciplinary medical research centre that would focus on cancer, cardiovascular diseases, diabetes, obesity and mental health.

Public Health Research Center

New York University Abu Dhabi has a Public Health Research Center (PHRC). It has developed the following specialised centres to conduct research in areas that concern the emirate of Abu Dhabi:

Diabetes Research Center

Obesity and Genetic Susceptibility to Diabetes Research Center
Human Oral Microbiome Research Center
Smoking Cessation Research Center.

Health Research Bank

The Ministry of Health and Prevention maintains a health research bank which enables researchers to access related research projects conducted in the UAE. The platform contains contributions from notable government and private health institutions.

Rehabilitation

The UAE's Ministry of Health and Prevention (MoHAP) announced its plans to introduce Virtual Reality (VR) rehabilitation in physiotherapy for stroke patients, patients suffering from balance disorder and children with developmental disorders, cerebral palsy and Parkinson's syndrome.

5. OPPORTUNITIES FOR AUSTRIAN COMPANIES

5.1 Opportunities

Greater public-private-partnership (PPP) Involvement for Healthcare Infrastructure Development

It is interesting to note that private participation has been on the rise in the UAE. DHA is creating an investment strategy which would promote Dubai as a competitive hub for investment in healthcare and enable sustainable public-private models in Dubai (DHA Investment Strategy 2017–2020). In December 2018, DHA announced plans to open a US$ 100 million cardiology hospital in the Rashid Complex in Dubai under PPP. Several other healthcare PPPs and investments were in the works, like Abu Dhabi's intent to procure around Dhs 10 billion (US$ 2.7 billion) of PPP infrastructure projects in 2020 across sectors. Through PPP the regional governments can leverage efficiencies and expertise of the private players to achieve their development goals and match international best practices.

Increased Focus on Preventive Care

The regional governments are focusing on preventive care in a bid to reduce the incidence of lifestyle-related diseases and associated costs. This will in turn help ease the burden on hospitals and existing healthcare resources. For instance, the UAE government is encouraging initiatives such as free screening for early detection of breast cancer and diabetes in collaboration with the private sector, while also promoting physical activity and healthier lifestyles. The MoH also launched the Health Heroes App to create awareness among children on the importance of adopting a healthy lifestyle in line with the National Agenda's aim to combat obesity among children.

Growing Prominence of LTPAC and Home Healthcare Services

Home healthcare services and Long-term and Post Acute Care (LTPAC) facilities are rising in popularity across the GCC. Apart from being less expensive compared to hospital admission, it is also a preferable option for aged patients as treatment is enhanced at the comfort of home.
The UAE too provides free home healthcare services for eligible citizens, ranging across medical care, rehabilitation, natural treatments, dental, optical, dermatological and diabetes treatments, and preventive care. Nursing services, physiotherapy, pharmaceutical delivery, stroke recovery, senior care, post-surgery, post-discharge and wound care, and disease management are also some home healthcare services being explored in the region.

With the onset of the COVID 19 pandemic, the relevance of such services, especially remote care delivery, have largely multiplied. As a result, regional governments and healthcare providers have been working cohesively to offer integrated services on digital platforms that eliminates the need for physical care, check-ups, consultations and treatment. Driven by the pandemic, video consultation calls as an alternative for outpatient visits and primary care consultation is increasing fast across the region. In May 2020, the UAE MoHAP announced strengthening its telemedicine system, which offers supporting medical specialties such as nutrition and physiotherapy, among other services. It is also crucial that operators start delivering other forms of care at home such as monitoring chronic patients or the treatment of vulnerable patients who require dialysis or chemotherapy. Similar approaches can be applied for prevention or treatment programs in primary care and mental healthcare departments.

Please see also chapter 7 Home Care and Rehabilitation.

Focus on Specialized Centers of Excellence (CoE)

Given the high demand for complex healthcare services in the region and the increasingly important need for quality improvements, specialized COEs have been gradually gaining ground in the GCC. Future investments in the health sector are largely being driven to fill this quality gap, and majority of the upcoming projects are focusing on the provision of specialized treatments. For instance, the Sheikh Shakhbout Medical City, established as a joint venture by Abu Dhabi Health Services Company and Mayo Clinic in November 2019, is one of UAE's largest hospitals for serious and complex care. In August 2020 it launched three new specialty surgical services in bariatric care, thoracic and colorectal surgeries. In September 2020 the UAE MoHAP announced the advanced international accreditation of Sharjah's Al Qassimi Hospital as a CoE for bariatric surgery, making it the world's first hospital outside the US to receive this award. In addition to focusing on establishing specialized centers for treatment, governments are also collaborating with private institutes to build specialized research facilities in the region. Abbott established the Abbott Diabetes Academy in the UAE, a dedicated training academy for healthcare professionals working with diabetes patients. In addition to acting as a CoE for specialized medical fields, these institutes provide practical tools for disease management and research.

Digitalisation of Healthcare Driving Enhanced Healthcare Outcomes at Lower Costs

Globally, digital innovation is a growing priority, as we see technologies disrupting the healthcare information technology (HIT) space. Around the world, health ministries and agencies are undertaking partnerships with companies involved in various aspects of HIT. Likewise, more companies and startups are turning their attention to developing technologies that deliver faster, cheaper, more accessible care, while keeping patients well informed.

In some markets, healthcare technologies are considered an approach to cost savings. In the UAE, however, the government is leveraging healthtech and smart healthcare to promote an integrated experience and improve patient outcomes. In particular, the local government seeks to tackle lifestyle diseases putting the country's healthcare system under pressure.

Currently, the UAE accounts for approximately 26 % of the total healthcare spend in the GCC. It is ranked among the top 20 countries in the world in healthcare spending per capita, at US$ 1,200.

Further, the UAE's health regulators are increasingly considering the adoption of new smart technologies. The country is predicted to add an additional US$ 182 billion to its economy by 2035 on the back of accelerated AI adoption. Digital health solutions around telehealth covering remote consultations were introduced in Q2 2019, where select private healthcare operators across the country started offering telehealth services to patients.

Further, the UAE government plans to prioritize fostering development of future technologies. Regulatory authorities' openness toward futuristic technologies and their application in the healthcare industry creates an agile environment.

The table below outlines how new modes of technology and digital solutions will affect regional healthcare:

Care guidance	Platforms that arm patients with relevant information and reminders at key points in their interaction with the healthcare system
Connected medical devices/wearables	Wearable technologies that help patients track and manage existing conditions and enable preventative techniques
Remote telemedicine	The remote diagnosis and treatment of patients using video conferencing over mobile device or a web portal, allowing them to access physicians, specialists or care professionals from their home
Home health robots	Machines programmed to provide 24-hour home care, especially to aged patients
AI	A platform that analyzes multiple data points, including home environment, behaviors and biometric readings, and highlights changes in an individual's health
Patient networks	Heath networks that help people find new treatments, connect with others and take action to improve their outcomes
Remote monitoring	Continuous, automatic and remote monitoring of users via sensors, to enable people to continue living in their own homes
Internet of Things (IoT)	The Internet of things (IoT) is a system of interrelated computing devices with unique identifiers (UIDs) and the ability to transfer data over a network without requiring human interaction

Technology is also assisting the region in combating the COVID 19 crisis. In addition to introducing contact tracing apps, the region is using multiple platforms assisting in remote care delivery. For example, the UAE MoHAP launched a chatbot service, Virtual Doctor, for people to assess if their symptoms could be associated with the COVID 19 virus. Notably, telemedicine has emerged as an effective tool for combating COVID 19, while also bridging the gap between patients, physicians and health systems. In addition to reducing costs and improving access to care, telemedicine offers a great potential as a sustainable solution to provide care remotely. For example, Abu Dhabi's Mubadala Investment Co. signed an agreement with Switzerland's Medgate in 2014 to create Abu Dhabi Telemedicine Centre. In Bahrain, Skype Telemedicine Solutions provides remote radiography, helping navigate the shortages in specialized care and improve patient services.

5.2 Challenges

The UAE healthcare sector has been undergoing transformation at an unprecedented pace and scale. Supported by positive reforms by the governments, the sector remains one of the most critical avenues for the region's long-term economic diversification strategy. The UAE's healthcare services continue to be of high interest to investors due to reasonable returns and sustainable growth opportunities. However, it is also important to cast a glance at the challenges that the UAE's healthcare system faces.

Limited Specialized Care Centers

Despite a well-established and growing healthcare sector, GCC countries experience supply gaps for a number of specialty segments such as cancers, neurological disorders, cardio surgeries, and trauma & rehabilitation services. As a result, outbound medical tourism for such complex cases has been on the rise, creating a huge strain on the government budgets. For instance, the DHA spends millions of dollars to cover the costs of UAE nationals seeking healthcare overseas. In 2018, a total of 1,207 patients were sent abroad by the DHA for treatment with total expenditure of Dhs 331 million (US$ 90.1 million). Nearly 25.4 % of the patients sent abroad sought oncology treatments, followed by 10.8 % for orthopedic surgery, 7.6 % for ophthalmology, and 6.7 % for neurology and neurosurgeries.

Shortage of Medical Professionals & Healthcare Institutes

Given the inherent shortage of medical professionals from the region, the GCC has been largely dependent on highly skilled expatriate talent for the expansion of the healthcare sector. With the accelerated development of medical cities and hospitals underway, the need for skilled medical professionals is set to rise exponentially. Consequently, capacity building activities and programs aimed at cultivating nationally-trained healthcare professionals are essential in the GCC. As of 2017, the GCC was home to 139 healthcare education institutes with Saudi Arabia (77 institutes) and the UAE (24 institutes) accounting for ~73 % of the total. While there are several nursing schools in the region, institutes for other health disciplines such as dental, medical and pharmaceutical are inadequate.

Ageing population and diseases

The UAE Population in 2021 is 9.99 Million according to the data provided by the United Nations. According to industry research, the UAE's average life expectancy is at 77.8 years while the infant mortality rate is recorded at 6 deaths per 1000 live births. Increase in life expectancy and fall in infant mortality rate has also highlighted the growing need for medical support over the increased lifespan of an individual. Sedentary lifestyle and poor dietary habits have led to the rise in diabetes and obesity to epidemic levels in the GCC. Notably, the incidence rate of cardiovascular disease, diabetes, cancer and respiratory ailments in the region is among the highest in the world. NCDs accounted for nearly 73 % of the total 157.6 thousand deaths in the region during 2016, with cardiovascular diseases, cancer, respiratory diseases and diabetes making up for ~55 % of the total. The NCD-related deaths in the UAE in 2016 is recorded at 499 per 100,000 population in the region.

Rising Cost of Healthcare

Cost of healthcare services continue to rise within the GCC due to growing demand for complex conditions amid limited availability of specialized treatment centers. In UAE medical inflation increased to 9.0 % in 2020 from 5.8 % in 2018. Additionally, rising cases of NCDs and other chronic conditions is also inflating demand for complicated treatment procedures and driving costs up. In the GCC, diabetes and obesity are common among the top causes of claims, with type 2 diabetes affecting 25 % of the population in the UAE. This along with high prevalence of obesity rates in the region is likely to lead to conditions such as cardiovascular disease, peripheral vascular disease and kidney disease. Although the implementation of mandatory health insurance has reduced the cost burden for the expatriate population, they still prefer to seek affordable treatment options at their home.

The confluence of the above factors, coupled with the rising cost of medical technologies, could further pose a significant challenge for the UAE's healthcare sector.

6. MEDICAL TOURISM

Although difficult to calculate, the global health tourism industry is believed to have generated revenues of approximately US$ 32.5 billion in 2019 – a CAGR rate of 17.9 % for the period 2013 to 2019. It is expected to reach US$ 207.9 billion by 2027, expanding at a CAGR of 21.1 %.

According to the World Tourism Organization (UNWTO), medical tourism comprises two segments: wellness and medical. Wellness tourism is an activity which aims to improve and balance overall wellbeing. The primary motivation is to engage in preventive, proactive, lifestyle enhancing activities such as fitness, healthy eating, relaxation, pampering and healing treatments. Medical tourism involves evidence-based medical resources and services which may include diagnosis, treatment, cure, prevention and rehabilitation.

Demand for healthcare services across the world is growing. The primary drivers are demographic factors such as increased longevity in general, and rising birth rates in certain regions. In fact, the percentage of the overall population aged 80 and above will more than double from the 2010 figure of 4 % to nearly 10 % by 2050, according to the Organization for Economic Cooperation and Development (OECD).

Inbound medical tourism in the UAE has been growing steadily, with visitors seeking treatment ranging from major surgery to rehabilitation to cosmetic corrections. According to the latest Medical Tourism Index Ranking, Dubai and Abu Dhabi were ranked the 6th and 8th "best" global destinations for medical tourism, respectively.

The government launched two medical tourism portals, one in Dubai called Dubai Health Experience (DXH) and one in Abu Dhabi called Abu Dhabi medical tourism portal. Both aim to strenghtens its position on the world map of health tourism.

The UAE's potential as a medical tourism destination is further supported by the wider tourism ecosystem in the country, such as attractions, hotels, entertainment and the provision of world class aviation and transport logistics. The primary areas of emphasis for medical tourism in the UAE are dermatology, orthopedics and ophthalmology.

Low cost and the existing tourism infrastructure contribute to the UAE's growing medical tourism industry. For example, the average cost of a hip replacement in developed countries such as the USA and Switzerland is US$ 26,500 and US$ 19,722 respectively; the same procedure in the UAE costs under US$ 15,000. However, the UAE exhibits higher costs of medical treatments and services offered compared with countries like India, Thailand, Singapore and others, which can lead to some local patients seeking treatment abroad.

Factors that contribute to making medical tourism attractive and efficient

In developing countries, medical tourism may contribute to modernization and expansion of healthcare facilities. The demand for treatment is fueled by an increase in the number of cases of lifestyle and chronic diseases, and complex surgery requirements, paired with rising medical costs in developed countries. Healthcare awareness amongst the general public boosts medical tourism for preventative care.

According to industry research, factors influencing medical tourism include:

- Affordability: Costs act as enabler for people to travel across borders for treatments
- High-quality healthcare: Specialized doctors in internationally accredited hospitals
- Immediate service: Acute mobilization and access to health services
- Anonymity: Individuals can obtain treatment without questions from their immediate circle
- Improved communication: Procedures can be scheduled, and consultation received using the web
- Travel opportunities: Travelers may enjoy the opportunity to visit a new locale
- Affluent patients: Wealthy patients may be able to access technically advanced treatment options unavailable in their country of residence

Outbound medical tourism primarily exists for Emirati citizens and those that have the financial background to seek medical treatment abroad. Emirati citizens have to get approval from the government, rather than the insurance, for medical treatment abroad. Due to its proximity Europe is the prime destination with Germany and Austria being among the preferences. Treatment which has been exhausted locally or any other specific and rare cases are continued abraod. Treatment abroad also depends on the preferences of the individual, therefore no pattern is indentifiable in regard to which procedure is sought out the most.

7. HOME CARE AND REHABILITATION

The home care service primarily aims at elderly emirati citizens. There are mobile clinic services in the remote areas of Fujairah and Ras Al Khaimah existing, it is planned however to expand healthcare programmes and services especially in this sector. Home care services include medical care, rehabilitation, natural treatments, preventive measures, dental, optical, dermatological and diabetes treatments.

Through the Ministry of Community Development primary healthcare and social, psychological and physical therapy is provided to UAE nationals who are at least 60 years, either at the elderly care centres or through their home care programme.

The Red Crescent Authority offers various programmes for the elderly and coordinates with the elderly care centres across the country to organise various activities and events that draw attention to the issues of old people.

The Abu Dhabi Rehabilitation Centre is the only centre that provides specialised care for the elderly in Abu Dhabi city. It admits senior citizens who have nobody to take care of them. Abu Dhabi Rehabilitation Centre offers a number of social services including diagnosis, consultation, physical therapy, speech therapy, psychotherapy, exercise therapy, water cure, work therapy, family counselling and integration into the society.

The Community Development Authority in Dubai runs 'Elderly Happiness' and 'Home Care (Weleef)' initiatives that ensure rehabilitation, care and happiness of senior citizens.

The Dubai Health Authority (DHA) provides home care services to both Emiratis and expatriate residents. The DHA covers comprehensive geriatric assessment, nursing care, home safety evaluations, rehabilitation and nutrition assessment, among others.

Sharjah provides home care services which involve accompanying the elderly citizens to hospitals and nursing them back to health.

In addition, there are a number of private rehabilition centers in terms of physiotherapy and after care for patients, for example:

Specialized Rehabilition Center Abu Dhabi
The center helps patients rebuild their lives that are recovering from life-changing illness or injury and focuses on patient outcomes to help patients regain independence and mobility. It is affiliated with The Shirley Ryan Ability Lab (previously known as the Rehabilitation Institute of Chicago) and offers world class rehabilitation services in Abu Dhabi.

Emirates Rehabilition & Homecare
Established in 2006, Emirates Hospitals Rehabilitation and Homecare Services (ERHC) was the first private post-acute inpatient rehabilitation facility in Dubai. It offers the entire continuum of post-acute rehabilitation care with a largely singular focus: total dedication to high quality, patient-centric care.

NMC Physical Medicine and Rehabilition
NMC is one of the biggest healthcare providers in the UAE with various specialized centers and services across the emirates.

8. COVID 19 IMPLICATIONS AND CARE

Impact worldwide and regionally

The outbreak of the novel coronavirus (COVID 19) has caused significant damage to global economies. The pandemic has spread at an alarming rate, causing a health crisis that the world is still grappling with. In addition to affecting human lives, the pandemic has also impacted businesses across the globe. In fact, 94 % of the Fortune 1000 companies are already weathering COVID 19 disruptions. The economic damage has sent shockwaves across advanced economies as well as developing nations, many of which are facing a daunting recessionary phase. Every region is subject to substantial growth downgrades as the pandemic is expected to leave lasting scars on human capital, trade, tourism, and healthcare.

The pandemic has placed immense burden on healthcare organizations across the world. The sudden surge in demand for COVID 19 treatment, precautionary and other services placed even the best resourced health systems under acute stress. The outbreak not only challenged the standard operational protocols but also disrupted the medical supply chain, leading to critical shortages across the continuum of care. At the same time, many providers are facing steep declines in revenue, primarily driven by the postponement of elective and non-urgent care. In order to boost the resiliency of health systems, industry stakeholders are integrating new-age technologies that enable smarter, more accurate, and predictive diagnostics and treatments, while also creating newer opportunities within the virtual healthcare space.

The pandemic has had a much more profound impact on the GCC, as the region is not only contending with COVID 19 but also dealing with lowest oil prices in past 17 years. As a result, governments across the GCC took a number of fiscal and economic measures to mitigate economic consequences stemming from the outbreak. In addition to imposing lockdowns and restriction on travel to lower the contamination rate, the GCC nations injected targeted stimulus packages and relaxed monetary policies to help reignite growth. Although these measures have helped in restoring confidence, key economic business activities across sectors have capsized.

Economic Impact of COVID 19 on the UAE

The UAE witnessed a decline of 6.1 % GDP growth for 2020. The UAE responded to the crisis with rapid capacity expansion of its existing healthcare infrastructure and rapid testing initiatives.

The pandemic significantly impacted the private sector activity in the UAE. At the same time, production shrunk due to supply chain disruptions, limited export opportunities and subdued domestic demand. This resulted in an estimated negative real GDP growth of 7 % y-o-y in Q2 2020, while the non-hydrocarbon sector contracted by 9.3 % y-o-y during the same period, after a drop of 2.7 % in Q1 2020.

Impact on the UAE's Infrastructure Developments

As the number of COVID 19 cases in the country continued to surge, the need for immediate medical attention became paramount. The UAE responded to the crisis with rapid capacity expansion of its existing healthcare infrastructure. For instance, the country established fully equipped, high-tech health facilities in Dubai and Abu Dhabi with bed capacities of 5,000 and 1,200, respectively. Aster DM Healthcare opened a new 50-bed critical care hospital in Dubai, especially to provide treatment to COVID 19 patients. Similarly, several hospitals were opened in Abu Dhabi, including field hospitals in Khalifa City, dedicated to treat only COVID 19 patients amid the growing need for hospital beds and to reduce the burden on other hospitals. In addition to this, unremitting support to medical staff, free testing and treatment for COVID 19 patients, and the use of smart applications has helped maximize UAE's effort in combatting the pandemic.

Aiming to subject its entire population to COVID testing, the country ranked first globally in COVID 19 screening per capita in June 2020 and by August, the authorities had already tested over 52 % of UAE's entire population.

UAE's Government Initiatives & Policy Responses

Coherent decision-making by the UAE government has been a crucial factor for its success in managing the pandemic. Given the country's heavy reliance on tourism and trade, the authorities moved quickly to implement a containment strategy by ordering business closures, cancel sporting events, and tighten travel procedures. Consequently, the EXPO 2020 was postponed until following year which helped the participants overcome the repercussions of COVID 19. While borders were sealed in March to restrict movement, a complete lockdown was implemented from early April until July 2020 to combat the spread of the virus at both the federal and emirate level. Although the average infection rate has been plummeting since May, the country is witnessing occasional spikes that might call for new restrictive measures to be imposed.

The UAE rolled out several stimulus packages aimed at supporting businesses and optimize spending to support the broader economy. The Central Bank of the UAE (CBUAE) launched an Dhs 100 billion comprehensive Economic Support Scheme for retail and corporate customers affected by COVID 19. Abu Dhabi Executive Council announced an economic stimulus package which includes allocating Dhs 3 billion to the SME Credit Guarantee Scheme. Dubai Government launched an Dhs 1.5 billion economic stimulus package which seeks to enhance liquidity and reduce the impact of the current global economic situation package to boost the commercial, retail, external trade, tourism, and energy sectors as part of the package; Abu Dhabi announced a total of 16 initiatives as a part of its 'Ghadan 21' development program to support commercial and industrial activities in the Emirate.

On the other hand, Sharjah announced two stimulus packages amounting to Dhs 481 million (US$ 130.9 million) and Dhs 512 million (US$ 139 million) to boost business continuity and development in various fields.

The government increased the expenditure allocated to the Ministry of Health and Prevention (MoHAP), which was initially 7 % of the federal budget for 2020, in order to manage the spending on precautionary measures needed to combat COVID 19.

Besides investing in increasing hospital bed capacity and workforce, various coordinated measures were undertaken to ensure the availability of efficient healthcare services to all those in need. For instance, the Dubai Health Authority (DHA) and Dubai Healthcare City Authority (DHCA) partnered with government agencies like Dubai Police and Dubai Municipality to tackle the outbreak. These agencies have been well supported by private sector players and research institutes like Mohammed Bin Rashid University (MBRU) that has played a key role in coordinating the efforts of ensuring sufficient capacity and unified testing and treatment protocols. Moreover, a designated 'COVID Central Command Center' has been established where all initiatives, challenges and learnings are translated into practice and unified policies for the decision makers to strategize against the rising contamination rate in the country.

In addition to streamlining healthcare services, the UAE has ensured that people receive adequate treatment for COVID 19. To facilitate this, the DHCA and Al-Jalila Foundation introduced a dedicated COVID 19 fund to assist the virus-infected patients who did not have the means to pay for their care. The UAE also announced access to free healthcare to all those infected, irrespective of a health insurance.

The country further ensured a smooth functioning of the society by deploying technological resources to maintain the health and wellbeing of its residents. For instance, the MoHAP launched a testing and contact tracing app, called Alhosn, in May 2020 in addition to using digital platforms for information exchange. The UAE also ensured the availability of ample medical infrastructure through an AI-driven platform that helps decision makers determine the need for healthcare facilities in each area across the country.

Key Companies

The UAE has a fair number of medical equipment and pharmaceutical distribution companies given the size and population of the UAE. These companies import and distribute products from countries across Europe, India, the US, Turkey and other countries that are involved in the manufacture of such products. The following companies listed below are examples of well established distribution companies that have the necessary infrastructure, both
in terms of human capital and logistics to effectively handle and activate different products and equipment across the UAE.

Name	**Contact details**	**Key Contact person**
Al Hayat Pharmaceuticals LLC	T: 00971-6-559-2481 W: www.alhayatuae.com	Mr. Anwar AbuEida (Business Unit Manager)
Gulf Drug LLC	T: 00971-4-501-4082 W: W: www.gulfdrug.com	Mr. Ghassan Istaitieh (Business Unit Manager)
Leader Healthcare Group	T: 00971-4-326-3980 W: leaderhealthcaregroup.com	Mr. Sabu Thomas (COO)
Mena Medical Supplies	T: 00971-4-252-0513 W: W: www.menamedical.ae	Mr. Gasser Nour (MD)
Bin Ali Medical	T: 00971-2-6760555 W: www.binalimed.com	Mr. Omar Ali Kunju (MD)
Pharma Trade LLC	T: 00971-4-899-1100 W: www.pharmatradeuae.com	Mr. Nagesh Thirugnanam (Finance and Administration Head)

II) OMAN

9. INDUSTRY AND MARKET SITUATION

9.1 Overview

Oman boasts a universal health care system, which offers free primary health care to Omanis and subsidized care for the foreign population of the sultanate. Over the past four decades, access to medical facilities and doctors has greatly improved the lifespan of Omani citizens, who have seen their life expectancies increase from 49.3 years in 1970 to roughly 77.2 years in 2019.

However, the cost of the public health care sector in Oman is increasing steadily, and future public health care investment will need to continue to rise in order to match this demand. This could prove challenging in the years to come and may see the private sector tasked with playing an increasing role in supplying medical treatment and care in the sultanate.

Indeed, there are already signs of this happening, such as the launching of Unified Health Insurance Policy (UHIP), which introduces mandatory health insurance for all private sector workers in the sultanate. In addition, the introduction of nominal fees for doctor visits could help the Ministry of Health (MoH) continue to offer free universal health care, as well as greater access to specialized treatment.

The health care sector in Oman is overseen by the Ministry of Health, focusing on expanding access to health services across the sultanate via investments in new health care facilities and with focus on quality improvement. Which spotlighted signature projects that should add high-end facilities to the existing health care landscape. In 2019 the government allocated US$ 3.4 billion to health care comprising 11 % of total expenditures, accounting for approximately 4.3 % of the country's GDP.

9.2 Recent Industry developments

Omanisation, a policy enacted by the government of Oman aimed at replacing expat workers with trained Omani personnel, is also prevalent in the health sector with noticeable growth in the last years. The Omanisation rate in Ministry of Health increased to 72 %. Furthermore, the Omanisation rate in consultant doctors reached 70 %, nursing 65 %, dentists 84 %, pharmacists 93 % and the assistant pharmacist 81 %. The number of graduations from medical specialties from various universities and colleges will contribute to raise Omanisation rates in all medical and paramedical entities. Yet the Omanisation rate in the private sector is only 10 % approx., compared to a much higher rate in government medical sector. Nevertheless, managers of private institutions follow the Ministry of Labour guidelines of Omanisation to reduce job volatility.
There are 34,062 medical professionals employed in Oman's public and private health service. It is estimated an additional 13,000 will be needed by 2040.
The Healthcare spending in Oman is expected to reach US$4.9bn in 2022.

10. MARKET PARTICIPANTS

Oman is divided into 11 Governorates with 61 Wilayats (provinces). The total number of hospitals (Government & Private) in the Sultanate is 83 hospitals with 6894 beds, while the number of health centers/ extended health centers reached 296 and 1254 for private clinics.

10.1 Public Health Sector

Public hospitals mainly provide services to Omanis, unless the expat patient is referred by a private hospital or requires special care, which can only be provided by public hospitals such as major surgeries in certain fields. Public hospitals can be considered as national referral hospitals for critical cases from other Governorate hospitals or also private hospitals.

Public hospitals and health centers type of health institution ran by Ministry of Health:

1. Governorate hospital, Wilayat hospitals and local hospitals
2. Health centers with / without beds or extended health centers

Major public hospitals are Royal Hospital, Al-Nahdha Hospital, Khoula Hospital and Al Masarra (Ibn-Sina Hospital).

Khoula hospital officially known as Directorate General of Khoula Hospital is one of the leading health institutions specialized in many fields, for instance general surgery, orthopedics, orthodontic surgery, hand surgery, neurosurgery, spinal surgery, neurosurgery, and physical & psychological counseling, but especially in accident and emergency medicine.
The Hospital was chosen as an educational center recognized by the Royal Society of Orthopedics, Neurosurgery and Plastic surgery.

The Ministry of Health is the main health care provider in the Sultanate. However, the Ministry of Defence, Royal Oman Police (ROP), Petroleum Development Oman (PDO) and Sultan Qaboos University (SQU) also provide independent health care, mainly for their employees and dependents.

The Sultan Qaboos University Hospital provides secondary and a tertiary services for the general population and also serves as training institute.

In addition to the Ministry of Health, the Central Quality Control Laboratory is responsible for ensuring the quality, safety and efficacy of pharmaceutical products in the country, while the Oman Medical Specialty Board, established in 1994 through collaboration between the MoH and Sultan Qaboos University (SQU), is the supervisory body for all postgraduate medical training programs in the sultanate.
The Medical Specialty Board is an entity that is in charge of the advancement of medical professions to ensure excellence in healthcare by promoting the growth of human resources in the sector. Which is achieved by developing specialized doctors and ensuring competencies of health professionals.

10.2 Private Health Sector

The Supervision of the private health sector falls under duties of the Directorate General of Private Health Establishments at the Ministry of Health. Although the contribution of the private health sector is yet small, it still plays a role in supporting Oman in achieving its health goals and provides 6 % of the hospitals, which mainly provide non-specialized services.

Since the outbreak of the pandemic in 2020, the private health sector was facing immense challenges that lead to the necessity of expansions on various private hospitals such as the expansion of the Aster Al Raffah Hospitals or the KIMS Medical Complex in Duqum Free Zone.

With 302 registered dental clinics in 2021 and 1494 dentists registered in 2019, a ratio of 3.2 dentists for every 10,000 population exists, compared to 1.1 in 2000.

There are 30 private hospitals, which mainly provide non-specialized services and 521 poly clinics, health centers and general clinics, as well as 149 specialized clinics and 49 Chinese & Indian clinics.

Muscat Private Hospital is the first Joint Commission Accredited Hospital (JCI Accreditation – International Gold Standard of Quality) in the Sultanate of Oman, founded 20 years ago by the Austrian comapny Vamed Engineering GmbH.

The recently inaugurated Oman International Hospital has begun to receive patients in April 2021. The private hospital was executed as a shared project of the new healthcare group in the Gulf Region, Al Afia Healthcare Development and Investment Company SAOC, composed of three diverse shareholders: Suhail Bahawn Group, Oman Brunei Investment Company and IGHS - Idealmed Global Healthcare Services.

In Addition, some of the accredited renowned private hospitals in Muscat are as follows:

Muscat Private Hospital
NMC Specialty Hospital
Al Haya International Hospital
Star Care Hospital
Badar Al Sama Hospital
Burjeel Hospital
Kims Oman Hospital
Al Abeer Hospital
Apollo Hospital

10.3 Key companies

The Omani market is run by few large distributors of pharmaceuticals, healthcare and medical devices importers. They mostly import from China, Turkey, the UK, the USA and Europe. Many of these companies are part of family-owned leading business groups in Oman, they are suppliers to the key institutions in the country, such as the Ministry of Health, the Royal Oman Police and the Ministry of Defense.

The following table highlights a selection of the largest players in the sector:

Name	**Specialty**	**Represented International Brands e.g.**
Muscat Pharmacy & Stores LLC	Import distribution sales of pharmaceuticals, dermaceuticals, veterinary, surgical products and equipment, hospital supplies, laboratory chemicals, baby products, health items, consumer goods	Johnson&Johnson, Bayer, HealthCare and AstraZeneca

Waleed Pharmacy & Stores LLC (OMZEST)	Importers & suppliers of pharmaceuticals, surgicals, hospital equipment, disposable & consumable products, laundry & dry cleaning equipment supply, mechanical equipment	Pfizer, Janssen, Astellas Pharma, Getinge AB, Maque & Thaleimer, Drager Medical GmbH-Ger., Schiller AG-SZ
Al Hashar Pharamacy	Hospital equipment, medicals devices, supplies & maintenance, laboratory diagnostics, ethical pharmaceuticals, over the counter medicines (herbal products), cosmetics	Diamond Diagnostics, Cypress Diagbostics, Norma, Roche, Tabuk KSA
Ibn Sina Pharamacy LLC	Import & distribution of pharmaceutical products and FMCG	Abbott Diabetes Care, OM Pharma-Switzerland,
Khimji Ramdas Medical and Health Infrastructure	Supply of medical grade cameras, printers & consumables, complete CSSD turnkey solutions, minimal invasive surgery, urology portfolio, OR management solution, surgical consumables, pneumatic tube systems and advanced motion technology, patient care	Dornier Medtech, clarius, Dovideq medical, Kirsch, SonoScape
Medical & Scientific Supplies LLC	Supply of hospital, medical, diagnostic, laboratory equipment, surgical disposables and chemicals	Medtronic/COVIDien USA, Straub Medical-Swiz, Medicon EG- Germany, Biomedical Tech
Bahwan Medical Supplies (Bahwan Healthcare Centre)	Pharmaceuticals, surgical instruments, consumables, medical equipment and devices, dental equipment products, laboratory supplies, bio medical services, healthcare IT and hospital furniture.	AGFA, Baxter, UNICHEM, BRAUN, Siemens, DÜRR Dental
Al Farsi medical Supplies	Importer and distributor of medical and dental equipment and disposables, laboratory	Saniwiss, Medesy, Leica, i-dental, GV health
Global Source Trading LLC	Medical and laboratory equipment and furniture, pharmaceutical supplier	Labcold, Hersill, Pall Medical, Helena, Erler Zimmer
Mustafa Sultan Science & Industry Co. LLC	Biomedical and analytical equipment	
Beta Scientific Instruments	Medical equipment, supplies medical simulation and healthcare education products	Laerdal, Limbs&Things, BoundTreemedical

11. LEGAL FRAMEWORK

Any Pharma company from abroad that would like to supply to Oman, needs a local agent, the agent would go through the approval process and finalize relevant formalities. The local agent must be registered with the Ministry of Commerce, Industry and Investment Promotion adding a specific commercial activity number to it, which enables the import of pharmaceuticals and medical devices. With the exception of a small number of trades and services, 100% foreign ownership of Omani companies is now a reality under the new Foreign Capital Investment Law that came into force in the Sultanate on January 7, 2020. This includes the area of Pharmaceuticals.

Prohibited commecial activitites are 37 types of commercial activities encompassing, among other areas, translation and photocopying services, tailoring, laundry, vehicle and automotive repairs, transportation and sale of drinking water, manpower and recruitment services, hairdressing and salon services, taxi operation, fishing, and rehabilitation homes for the elderly, disabled and orphans.

Pharmaceutical products are price controlled by the Ministry of Health and the price is unified within the GCC market. The Directorate General of Pharmaceutical affairs and Drug Control is the regulatory body at the ministry, which is responsible for any related procedure, for example clearance, approvals, registrations of products, classification, marketing approvals or guidelines of drugs and medical devices.

12. TRENDS

12.1 Projects

Hospitals and related healthcare ventures account for a third of the around 33 projects and initiatives involving investment totaling around US$ 2.5 billion. The Public-Private Partnership (PPP) unit of the Ministry of Finance oversees these projects.

Currently in planning are general hospitals each worth US$ 72.80 million at Bahla and Samayil, as well as a string of similar general hospitals named Al Namaa (US$ 73 million), Al Falah (US$ 72.8 million), Al Najat (US$ 72.8 million) and Rashad (US$ 70.2 million). More modest-scale hospitals are also planned at Dhalkout (US$ 39 million), Al Mazyouna (US$ 33.8 million), and Bukha (US$ 18.2 million), while a one-of-a-kind National Rehabilitation Centre is also on the cards at a cost of US$52 million.

Furthermore, in March 2021 the Ministry of Finance has outlined plans for the procurement of a Hemodialysis Services Project supported by the private sector.

"This project aims at establishing and developing a number of dialysis centers in order to benefit a larger number of patients, in addition to reducing the costs borne by the Ministry of Health", the ministry said.

Separately, a Drug Rehabilitation Centre is planned at Suhar to provide treatment and post-treatment services to recovering addicts.

The Pharma industry has some encouraging projects in the pipeline, including a US$ 365 million pharmaceuticals plant in the Salalah Free Zone, which will produce over 100 pharmaceutical products upon completion in 2021. The OMR 140 million (US$ 363.6 million) project will include research and development facilities and laboratories, with an aim to provide 300 employment opportunities.

Following chart provides an overview of the ongoing and planned projects:

Project name	Est. worth in Mio. $	Status	Client	Contractor
New Sultan Qaboos Hospital in Salalah	316	Construction 56 %	MoH	Al Tasnim Enterprises LLC
Al Suwaiq General Hospital	300	Construction 60%	MoH	Al Tasnim Enterprises LLC
General Hospital in Khasab	158	Construction 56 %	MoH	Al Tasnim Enterprises LLC
Al Nama General Hospital	73	on Hold	MoH	
General Hospital Bahla	72,8		MoH	
General Hospital Samail	72,8		MoH	

New General Hospital at Al Namaa	50	on Hold	MoH	Khatib & Alami Consolidated Engineering Company
Multi Specialty Hospital	50	On Hold	Gruppo Maltaura, Al Madina Real Estate (SAOC), Oman	
Hospital in Al Mazyounah	40	Construction 34%	MoH	Al Khalili Construction LLC
Mahoot General Hospital in Al Wusta	40	Tender for Construction	MoH	AAW & Partners LLC
Expansion of KIMS Duqm Medical Complex in Duqm SEZ	30	on Hold	Duqm Development Company SAOC	
Sohar Specialized Hospital and Rehabilitation Centre	20	Concept Stage	Murtadha Business Solutions L.L.C/Vamed Engineering GmbH	
Extension of Haima Hospital	15	on Hold	National Engineering Office	
Aman Healthcare Maternity and Childcare Hospital in Sohar	8	Construction 11%	Oman Investment Corporation	Dawood Contracting LLC
Rehabilitation Center in Al Amarat	5	Construction 96%	MoH	Al Hajiry Trading LLC
Medical Fitness Center in Samail Industrial City - Plot No. 93	1,5	Tender for Construction	Public Establishment for Industrial Estates (PEIE) - Madayn	

12.2 Health insurance

Free health services are provided for Omanis in public Health institutions to decrease and balance the high demand, expatriates on the other side receive the required health care services at private hospitals or clinics. Due to the growth of the population in the country and the rising demand to more health care services/facilities, as well the rising epidemiological disease profile, the costs of health care services have risen rapidly. Therefore, even locals have started claiming private health insurance to cover costs of health care services at private institutions. Most of the health insurance companies cover all essentials health care services; nevertheless, the coverage is based on the package claimed by the client.

According to data from the Capital Market Authority (CMA), in 2020 total health insurance premium were OMR 84 million (US$ 218 million).

In March 2019 the government has introduced the mandatory health insurance law in Oman. New regulations now require private sector employers to provide coverage for their expatriate staff, as well as for their spouses and children. This comes as the government takes prudent steps to tighten its budget and looks to shift the cost burden of provision – which has been historically reliant on public coffers – to the private sector.

International insurance companies such as AXA and MetLife are also operational in Oman. The most common insurance companies are National Life & General Insurance Company, Oman United Insurance company, Dhofar Insurance Company, Oman Qatar Insurance company, Oman Insurance company and Muscat Insurance company.

Along with the increased efforts to invite private participation in hospital and clinic construction through public-private partnerships (PPPs), the new mandatory health insurance law presents a significant opportunity for providers and insurers to expand their presence in the local market.

Legislations and Legal Structures Regulating the Insurance Sector in Sultanate of Oman

Capital Market Authority "CMA" is supervisory authority institution for Insurance & Reinsurance Companies and sector in Sultanate of Oman publishes annual Oman insurance market index.

Health Insurance Legislation

To embody the efforts exerted to implement health insurance mandatory schemes for the employees of the private sector and visitors the issued the licensing regulation for Third Party Admiration of Health to regulate the business of TPAs which administer the medical claims between insurance companies and Health Insurance policyholders and hospitals, clinics, and pharmacies.

Mandatory Coverage

The growth trend is set to continue as the government launches the Unified Health Insurance Policy (UHIP), which introduces mandatory health insurance for all private sector workers in the sultanate.

The UHIP regime stipulates a set of essential benefits that must be covered, including in- and outpatient services, emergency care, doctors' fees, diagnostic services, medicines and ambulance trips. The scheme is expected to provide insurance cover for 1.7 expatriate workers. As of mid-2019 the number of people with health insurance stood at an estimated 450,000 out of a total population of 4.5 million. In addition to shifting some of the health care burden off the government, the new UHIP law is expected to be a boon for the private insurance market and health care institutions.

"The UHIP as envisioned by the Capital Market Authority (CMA) provides an excellent opportunity for private insurance sector players to get involved and increase their premium" says S. Venkatachalam, CEO of National Life and General Insurance Company.

"UHIP was described as a good move, and one that has been modelled after the successful mandatory health insurance practices of other GCC countries" mentioned by Mr. Haitham Abu Hashim, former executive director at Muscat Private Hospital. He also mentioned that the CMA should monitor the relationship between insurance companies and health care providers under the UHIP to ensure that as qualified insurance companies grow their premium, high-quality patient care within hospitals is maintained.

Furthermore, in conversations with Mr. Murtadha Al Jamalani, Chairman of the Committee-Finance & Insurance Sector at the Minisitry of Commerce Industry and Investment Promotion, he noted

"The introduction of mandatory health insurance in United Arab Emirates, Kuwait & Saudi has spurred a rapid and necessary sophistication of the local health insurance market to which the GCC must attempt to emulate if their schemes are to cope with booming growth. There are over 200 million people in the region and health as a percentage of GDP ranges between 2 % to 4 % compared to around 10 % in the EU and 17 % in the USA"

says Carl Sardegna, CEO of Green Crescent. He also mentioned that the Economic Committee at the Majlis Ash'shura (Parliament Council) communicated the importance of constituting an independent national agency on the lines of a National Health Council to strengthen overall supervisory oversight of health insurance services when coverage becomes mandatory.

Looking at the insurance sector in Oman, there is a rather disparate sector made up of around 11 national insurers and nine foreign companies, in addition to one specialized reinsurance company (owned jointly by local and foreign players) and handful of third party administrators (TPAs). In all, Oman has 204 company branches, 152 agents and a network of 69 brokers across the country.

Mr. Murthada expressed his worries, as when the mandatory health insurance scheme is implemented, there will be race to the bottom in the pricing of policies, service standards will plummet, and the vulnerable players will be forced out of the market. However, with a National Health Council, many of these scenarios can be quickly addressed and resolved. A sound supervisory and regulatory framework will also make it attractive for foreign players in the health sector to enter the market.

12.3 Medical education

Oman is planning to have by 2040 more than 13,000 Doctors trained, as a part of the long-term diversification strategy Oman Vision 2040, with the aim of 28 doctors per 10,000 inhabitants.

Colleges and type of medical fields taught

Public Universities/Colleges:

- College of medicine and health sciences at the Sultan Qaboos University
- College of Nursing

Private College:

College of Medicine based in Sohar, at the National University of Science and Technology, which has commenced its operations 2018, by combining three professional existing colleges in Oman. Two out of three are medical education institutions Oman Medical College – OMC and Department of Pharmacy (within in OMC). The College is the only private education provider in Oman.

The college educates in several medical fields such as:

Anatomy & Neurobiology, Family Medicine, Internal Medicine, Microbiology & Immunology, Pathology, Psychiatry, Biochemistry, Physiology & Biophysics.

13. OPPORTUNITIES FOR AUSTRIAN COMPANIES

The government has recently expressed interest in opening the sector to greater private investment, with stakeholders looking to expand the use of PPPs. In July 2019, the government released widely anticipated PPP and privatization laws to open key economic sectors – including health care – to private sector investment. As per the first stages of the law, the private sector is only being invited to design, build and maintain state clinics, with management remaining under the remit of the Ministry of Health.

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The Implementation of the mandatory health insurance scheme for the private sector, also known as ‘Dhamani’, will commence in 2023, according to a key official of the healthcare sector.

This was announced September 2022 by Dr Waleed al Zadjali, President of the Omani Medical Association(OMA). He said the scheme will be rolled out in phases to cover different categories of private companies operating in the Sultanate of Oman.

Under the the Dhamani scheme, private sector employees and their dependents will be covered by mandatory health insurance. Tourists and visitors to Oman will be brought under the purview of the programme as well. Health insurance is one of the fastest growing segments of the insurance industry in the Sultanate of Oman. According to the audited financial statements of the insurance sector, health insurance premiums rose 5.6 per cent to RO 164 million in 2021, and the value of compensation related to health insurance activity dipped 0.5 per cent to RO 120 million. The data also showed an increase in the health insurance policies by 88 per cent to 23,000 policies.

Once mandatory Health Insurance Scheme comes into force, licensed insurers are required to run their healthcare insurance business professionally independent of their other insurance activities — a move that recognizes healthcare insurance as the new dominant stream of the insurance industry. We see great potential for Austrian health insurance companies to enter the market, expertise and know-how is needed.

13.1 Pharma, Medical Products and Technology

The General Directorate of Pharmacy and Drug Control in the Ministry of Health, which follows the Office of the Undersecretary for Health Affairs carries out many responsibilities, including supervision of medical devices and supplies, monitoring problems, related to its quality and effectiveness, as well as ensuring the quality of pharmaceutical care provided to all patients at different levels of health care in coordination with the concerned authorities.

Oman relies mainly on private sector importers and distributors to supply the country's pharmaceutical needs, 7 % of the market demand is covered by local production. It was reported in 2018 that Oman annually spent around US$ 311 million on pharmaceutical imports and another US$ 300 million on medical supplies. The sector continues to be mostly dominated by large private companies such as Muscat Pharmacy & Stores or Bahwan Medical Supplies. Both giants import pharmaceuticals as well as medical devices from a large number of global suppliers. As per the latest statistics from 2019, Oman has around 797 private pharmacies, the majority of them are in Muscat followed by South Al Batinah Governorate.

3.3 % of registered manufactured medical products in Oman are accounted for by few local pharmaceutical manufacturers: the Oman Pharmaceutical Products LLC and National Pharmaceutical Industries Co. (SAOC). As well as Drug Manufacturing Company LLC (DMC), which began its commercial operations in 2nd quarter of 2021. The latter is an approved pharmaceutical firm in the GCC and the European Medicinal Authority.

Al Farsi National Enterprises LLC, a leading Omani supplier of medical equipment to government and private hospitals has been approved and started to produce masks and will be launching Oman's first N95 respirator masks.

13.2 Challenges, Demand & COVID 19

Challenges and demands in the Pharma-industry has taken globally a different pattern since the outbreak of the COVID 19 pandemic in 2020. In Oman companies are mainly facing Cash flow issue, reduced work force sector due to reduced working hours.

B.S. MEHTA the MD of Muscat Pharmacy shared his impressions with us:
"There has been an increased demand for chronic medication like antidiabetics and cardiovascular drugs. We have seen that some people were unable to travel back to their home countries and were held back here last year. Some patients are unable to get their regular chronic medicines from their home countries and purchased locally. Stress levels have increased significantly due to uncertainties. There has been a significant drop in demand of antibiotics and in sales for nebulizing solutions and most pediatric preparations. Demand for cough

and cold preparations, anti-allergic medicines was also limited. But there was an increased demand for COVID related medicines like paracetamol, multivitamins / vitamin C and other immunity boosters, anticoagulants, drugs preventing blood clots, skeletal muscle relaxants, steroids, injectable antibiotics, antiviral and items like sanitizers, masks, PPE suits"

He also pointed out few challenges:

"Import of medicines from overseas suppliers was affected as manufactures could not supply on time due to reduced staff in their factories, non-availability of flights due to border restrictions and other logistic and documentation issues. Freight charges were also very high. Promotion of medicines locally to medical fraternity was impacted due to COVID lockdown restrictions and inability to meet the doctors. Online marketing activities have not been very useful. There was a reduced footfall at the clinics & pharmacies impacting sales of prescription and OTC medicines, skin care products & pharmacy related items. Hospitals also catered to mainly emergency cases. Financial resources were strained considerably resulting in significant delays in payments from customers, both institutional as well as private."

Mr. Ganesh Babu from Bahwan Healthcare Centre also stated:

"Due to pandemic, Oman needs more PPE kits, COVID 19 test kits, vaccines, medical consumables and disposables and lab reagents."

14. MEDICAL TOURISM

The outbreak of COVID 19 and the implemented travel restriction had a large negative impact on the medical tourism sector by cutting off medical care services from abroad. The Treatment Abroad Department & Committee at the Ministry of Health are responsible to discuss medical cases, which are referred from consultants in hospitals.

The Ministry of Health covers all reasonable costs for patients who require treatment abroad, however those treatments should not be doable or available in Oman. Most of the cases are sent to India or Turkey for treatment.

There are no specific diseases or illness, which require sending patients abroad, however Mr. Abdelbaseet from the Treatment Abroad Department at the Ministry, pointed out few cases such as in Oncology Department: "PSMA SCAN, lu 177 therapy, Acc225 therapy and complex surgeries. Also, complex surgeries in other diseases except the cardiology department which is 98% done in Oman. Few patients are sent for Maxillofacial and Oral surgery (TMJ). Due to the outbreak of the pandemic, the ministry stopped sending patients abroad only in emergency cases."

Nearly a 100,000 Omanis go abroad for medical care as a result of long waiting lists for surgical and other procedures in Oman's public and private hospitals and the requirement for more specialized services and resources. The Oman government is encouraging foreign investment in the country's healthcare sector to support the growing demand for these services. This will also pave the way for new investment opportunities resulting from the several multi-million-dollar healthcare projects currently being constructed all over the sultanate and in the pipeline. Alongside the government's long-term strategy, the Health Vision 2050, Oman is looking at the moment to benefit from planned projects and partnerships with foreign companies. The aim is to build high-quality centers and hospitals, bring in foreign expertise, specialists, specialized treatment and services, and state-of-the-art medical systems and technology.

„Patients who book trips through Bahwan Travel Agencies LLC most to Thailand, India, Germany and the Czech Republic especially for physiotherapy treatment, and to Iran amongst others for eye treatment. The costs are mainly covered by the Ministry of Health or sometimes by the Royal Diwan Court. Trips to Iran for cosmetic surgeries and Turkey for hair transplants are privately financed." says Mr. Abdullah Al Jabri, Head of Holiday at Bahwan Travels.

Mr. Pankaj from Khimji House of Travel stated
"The most preferred destinations before the outbreak of the pandemic were India with approx. 450-500 patients per annum, followed by Germany of around 200 patients and then the USA. Patients do mention that the purpose of the trip is medical treatment and need to be accommodated close to the hospital, however, they do not specify the medical cause or who will cover the trip financially."

15. IMPORTANT CONTACTS IN OMAN

Institution	Telephon
Emergencies	9999
Ministry of Health (Arabic and English)	+968 (24) 441999 +968 (92) 199389
Royal Hospital Muscat	+968 (24) 599000
Sultan Qaboos Hospital Muscat (severe cases)	+968 (24) 141007
Al Nahdha Hospital Muscat (mild cases)	+968 (22) 503333
Directorate-General for Diseases Surveillance and Control	+968 (92) 199389
Infection Prevention & Control (CDIPC)	+968 (91)313315
Central Public Health Laboratory (CPHL)	+968 (91) 313316
Muscat Governorate	+968 (90) 924212 +968 (24) 707264
Dhofar Governorate	+968 (93) 531812

16. FURTHER INFORMATION

Below you will find information on the most important fairs, organizations and trade journals in the region.

16.1 Trade Shows

Trade shows in the UAE are leading exhibitions for the whole region and pose a link to the Asian market. The AußenwirtschaftsCenter Abu Dhabi organizes, in cooperation with the Außenwirtschaft Austria, a number of Austrian group-stands at relevant international trade fairs. This gives Austrian companies a good opportunity to get to know potential customers. The group stands enable inexpensive first contacts and a foothold in the region.

- **Gulfood Manufacturing**

  Trade fair for food technology and dietary supplements in the Middle East, Near East, Africa and Asia.
  https://www.gulfoodmanufacturing.com/

- **Arab Health**

  The biggest names in the healthcare industry, regionally and internationally, are gearing up to interact.
  https://www.arabhealthonline.com/en/Home.html

- **Medlab Middle East**

  Products and exhibitors that introduce remarkable medical laboratory innovations.
  https://www.medlabme.com/en/home.html

- **AEEDC (International Dental Conference & Arab Dental Exhibition)**

  The largest annual scientific dental conference & exhibition in the world.
  https://aeedc.com/

- **Dubai Derma**

  Shaping the future of Dermatology and Aesthetics.
  https://dubaiderma.com/

- **Obs-Gyne (Arab Health Obs & Gyn Conference)**

  The region's official meeting place for women's health practitioners in the Middle East.
  https://www.arabhealthonline.com/en/education/conferences/obs-gyne-conference.html

16.2 Trade Associations and Organizations

- Emirates Medical Association
  https://www.ema.ae/

- Emirates Physiotherapy Society (EPS)
  The EPS was established by the effort of a group of physiotherapists under the umbrella of the Emirates Medical association (Non-profit Organization licensed by Ministry of Social Affairs) in May 2002, when the first meeting was held. Since then the efforts of the society have been concentrated on raising the standard of physiotherapy in the country.
  https://www.uaephysio.org/

- American Association of Clinical Endocrinologists
  aace.com

- Arab Association Of Surgical & Medical Aesthetics
  https://aasma.org

- Arab Association of Urology
  araburology.org

- Arab Society for Paediatric Endocrinology and Diabetes
  aspedconference.com

- GCC Association of Immunology and Rheumatology
  gccair.org

- Gulf Heart Association
  gulfheart.org

- International Inter-Professional Wound Care Group
  iiwcg.com

- Pan Arab Interventional Radiology Society
  pairsweb.org

16.3 Trade Journals

The AussenwirtschaftsCenter Abu Dhabi will advise you on advertising in the trade press and will be happy to help you with any questions you may have.

- **New Emirates Medical Journal**
  An official journal of Emirates Medical Association.
- **Dubai Medical Journal**
  Original scientific research in the fields of medicine, health sciences, nursing, pharmaceuticals, and laboratory and other related sciences. Nonclinical subjects related to medicine, especially ethics and complementary medicine as well as social and cultural issues, are also covered.

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