

DUBAI HEALTH INVESTMENT GUIDE

2018



A comprehensive guide on health investment in Dubai with a listing of investment needs and opportunities for health services

Towards a healthier & happier community



His Highness Sheikh Mohammed bin Rashid Al Maktoum

Vice President and Prime Minister of the UAE and Ruler of Dubai

“The new Law¹ will facilitate a new growth phase in the healthcare sector and help cement Dubai’s position as a global hub for medical tourism. We want to offer the best healthcare facilities and services and attract top healthcare establishments, the best medical personnel and the most advanced technologies.”

“The expectations of UAE Nationals and residents about Dubai’s health sector are higher than any other nation.”

His Highness Sheikh Hamdan bin Mohammed bin Rashid Al Maktoum

Crown Prince of Dubai and Chairman of the Dubai Executive Council



“We aspire to achieve a significant leap in the health sector in Dubai and we believe this will further establish Dubai as an international medical hub. We are working towards our goals and we hope to achieve them.”

His Highness Sheikh Hamdan bin Rashid Al Maktoum

Deputy Ruler of Dubai, UAE Minister of Finance,
President of the Dubai Health Authority

“Dubai has achieved a number of qualitative accomplishments in the development of its health care system due to the availability of infrastructure reSources, the human reSources potential, and the ambitious plans to improve the health care sector in the Emirate. Our aim is to attract investments that benefit the emirate and the community via an investment strategy in the health sector in line with the emirate’s aspirations to provide a healthy global model that also meets with the objectives of the Dubai Plan 2021.”

Sheikh Maktoum bin Mohammed bin Rashid Al Maktoum

Deputy Ruler of Dubai



FOREWORD

Investing in Dubai's healthcare sector

Dubai remains one of the fastest growing cities in the world, it is a land of opportunity and a destination for those seeking a safe and stable haven to grow their investments and businesses.

This is in line with the vision of His Highness Sheikh Mohammed bin Rashid Al Maktoum, Vice President and Prime Minister of the UAE and Ruler of Dubai. It is also within the directives of His Highness Sheikh Hamdan bin Mohammad bin Rashid Al Maktoum, Crown Prince of Dubai and Chairmen of the Executive Council.



Increase in demand for quality health services due to Dubai's rapid urban development, population growth and influx of medical tourists is one of biggest challenges facing the Dubai Health Authority.

Many of world's largest hospitals and specialized centres have invested in Dubai's healthcare sector after realizing the city's unique investment climate, which provides a number of investment incentives in the healthcare sector.

In this guide, the Dubai Health Authority, under the leadership of His Highness Sheikh Hamdan bin Rashid Al Maktoum, Deputy Ruler of Dubai, Minister of finance and President of the Dubai Health Authority, we made sure to highlight the city's attractive healthcare investment opportunities.

The guide especially highlights specialties in the health sector that require more investment due to their high demand. It also pinpoints the locations most in need for medical services and the types of health services required.

The guide, which also identifies the city's legislations, procedures and available investment incentives. It has been developed based on studies that took into account the growing demand for health services in Dubai to provide realistic guideline on how to invest in Dubai's healthcare sector.

His Excellency Humaid Mohammed Obaid Al Qutami

Director General, Dubai Health Authority

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The Dubai Advantage

Dubai's appeal is the result of visionary leadership and of carefully considered policies designed to create a thriving economic environment and an attractive lifestyle. The city at the heart of the emirate of the same name is firmly anchored as a favourite destination for expatriates and visitors, as their ever-growing numbers attest. Sustained by an active population and state of the art infrastructure, Dubai is continuously improving and developing as a city, as a hub and as a gateway.



Dubai the **CITY** of the **future**

- A vibrant city with a dynamic, open and can-do mindset
- A city of opportunity for professionals, investors and entrepreneurs

Dubai the **GATEWAY** to **growth markets**

- A strategic location between Europe, Africa and Asia
- Future-ready infrastructure and logistics for both tourism and business

Dubai the **global business HUB**

- A business hub for the world, attracting international investment, connected and cutting-edge
- A recognised quality of life and ability to retain talent



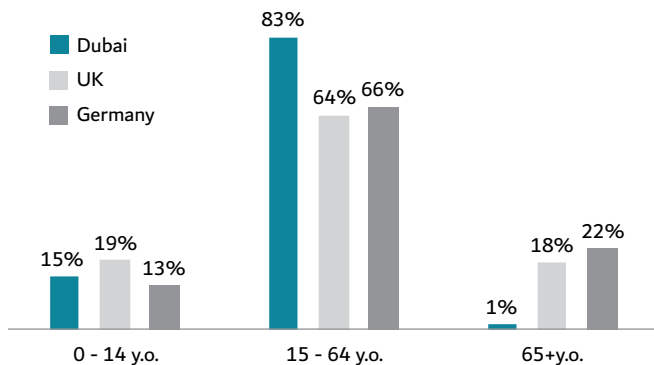


Dubai the CITY

Dubai is home to an international and prosperous population, living in a stable and safe society. Dubai is also a city with a dynamic, open and investor friendly economy, one of the world's most connected cities, with future-proofing built into all new projects. Its consistent strategic investments in 360-degree development have ensured its transition from a dependence on oil revenues to an economy propelled by industrial production, services and knowledge.

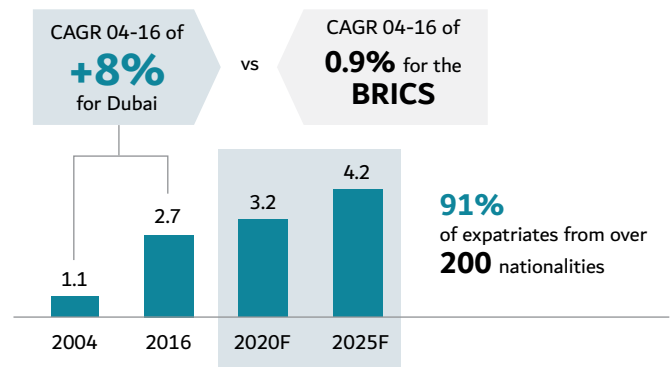
Dubai is home to a young and fast growing population

Figure 1: Population breakdown per age range (in percentage)



Source: United Nations, Dubai Statistics Centre

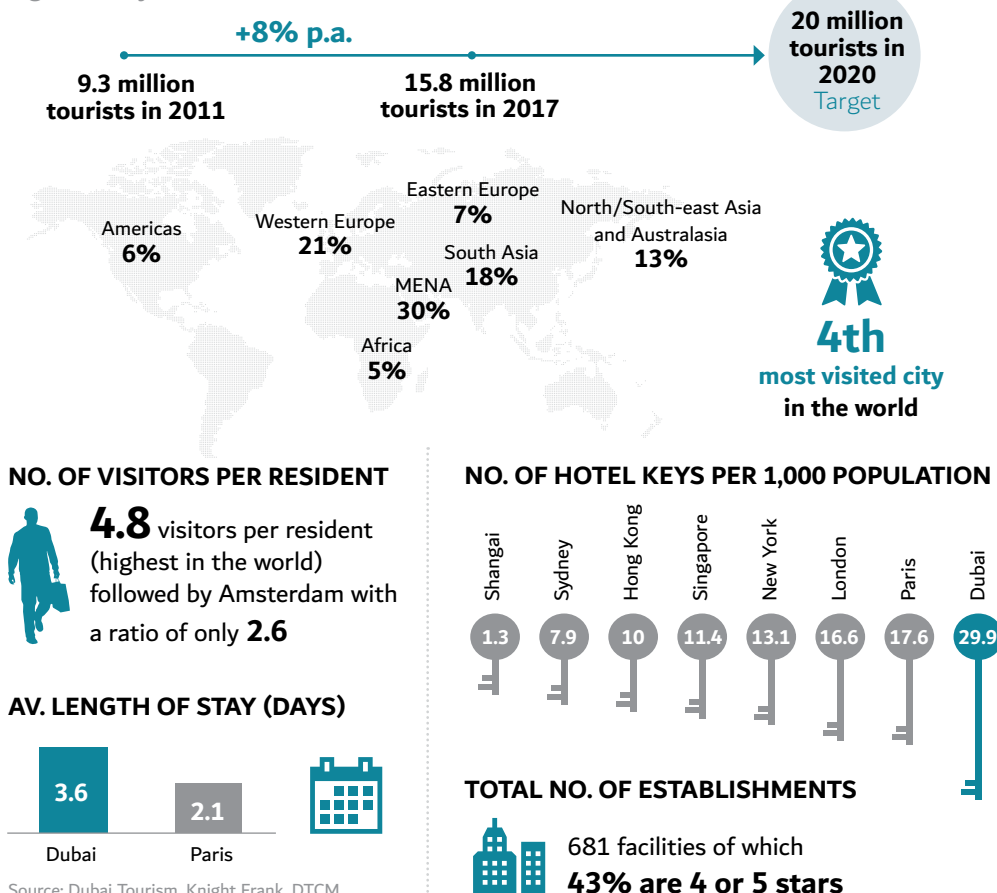
Figure 2: Growth of Dubai's population (in millions of inhabitants, 2004-2025)



Source: United Nations, Dubai Statistics Centre

Dubai is an alluring destination for tourists and visitors from all around the world

Figure 3: Key tourism indicators in Dubai



Source: Dubai Tourism, Knight Frank, DTCM, Mastercard Global Destination Index 2017

DUBAI'S TOP ATTRACTIONS



BURJ KHALIFA
World's tallest building

THE DUBAI MALL
World's largest shopping mall
Over 1.5 million visitors every week

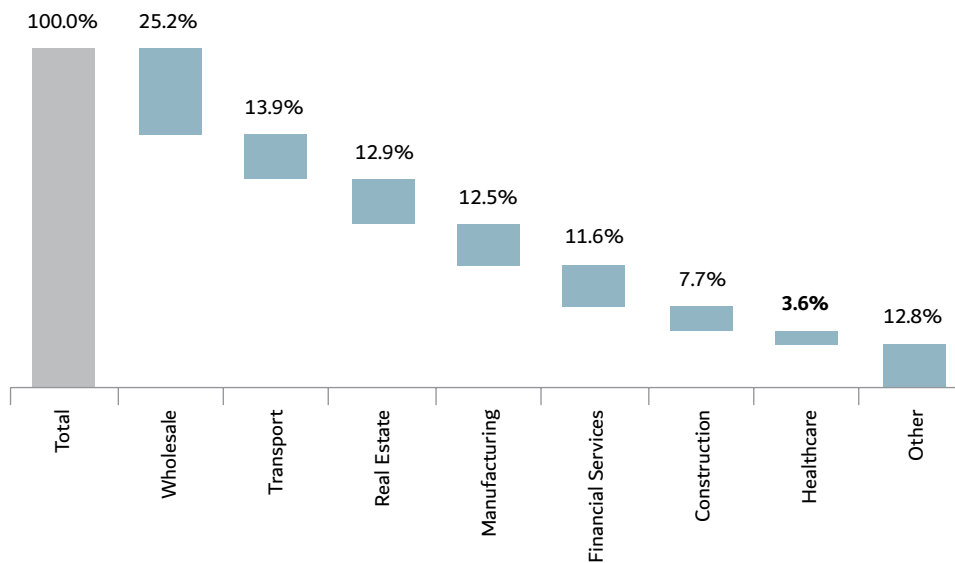


The **man-made** Palm Islands and The World Islands

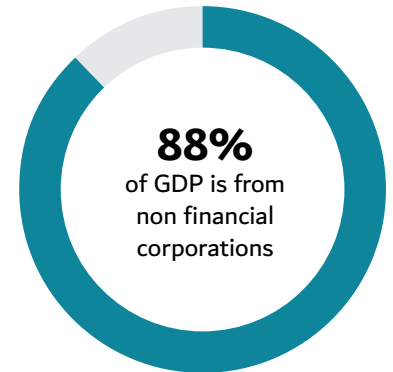
IMG World is **the largest indoor theme park** worldwide
Welcomes 20,000 visitors a day

Dubai is already diversified, the healthcare sector accounting for only 3.6% of its GDP

Figure 4: Dubai GDP breakdown, by sector (2014)



Source: DCCI, Dubai FDI





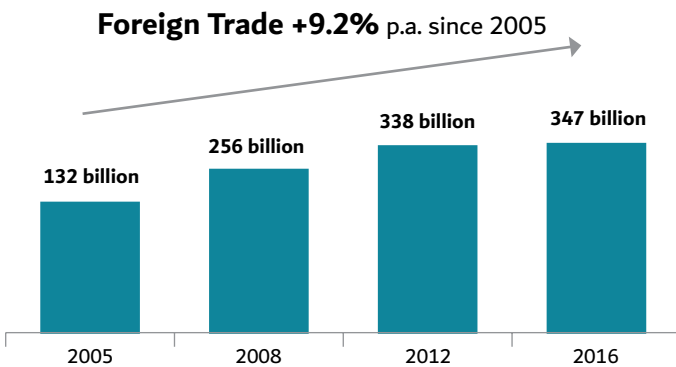
Dubai the GATEWAY

Capitalising on its strategic location between Europe, Asia and Africa through peerless travel and logistics facilities, Dubai provides access to two-thirds of the world's most attractive growth markets.

Dubai's economy is open and benefits from a strategic location between Europe, Africa & Asia

Dubai's economy is open and attractive to business and investors, with 100% allowance of capital and profit repatriation, with no corporate nor individual income tax and with no foreign exchange controls. Moreover, through its membership of the GCC, Dubai benefits from multiple international agreements with other economies such as the free trade agreement signed with Singapore (GSFTA) in December 2008 and with EFTA countries (Iceland, Liechtenstein, Norway and Switzerland) in June 2009. Further, Dubai is a member of international trading associations such as the WTO and the GAFTA.

Figure 5: Evolution of Dubai's Foreign Trade (2005-2016, in USD)



Source: Dubai Statistics Centre, 2005-2016



3rd most open economy in the world, in terms of total foreign trade as a percentage of GDP



Two-thirds of the world's population live within **eight hours of flight** from Dubai



Dubai ranks **# 1** in the **World Bank's logistics performance index** for the MENA region.

Source: World Bank, Dubai Airports, Dubai Statistics Centre

Dubai also benefits from world class transport and infrastructure



3.5 million tonnes airfreight moved through DXB and DWC in 2016



Dubai International Airport (DXB) is the busiest airport globally, when measured by international passenger traffic, receiving **more than 232k passengers daily** in 2016

DXB welcomes **140 airlines** connecting **260 destinations** across six continents



Jebel Ali port is ranked as the **9th largest world container port** by the World Shipping Council, managing an annual volume of 15.6m twenty-foot equivalent units and serving over 180 shipping lines



Jebel Ali port



Dubai the HUB

Dubai is one of the world's leading business hubs and nurtures one of its most connected and investment-ready economies. Dubai is the preferred location for the global and regional headquarters of many large corporations and is a home of choice for global talent.

Dubai is an investor-friendly destination

Dubai has created a welcoming environment for businesses through measures taken to facilitate the set-up of new business, offering a streamlined process for electricity connection (ranked #1 in the World Bank's Ease of Doing Business index) and for construction permits (#2), a favourable tax regime (#1), regulation for protection of minority investors (#10) and for contract enforcement (#12), to cite but a few.



Dubai's **27 free zones** represent an attractive and sector-oriented setup, covering **healthcare and biosciences, academics, technology and finance**



The UAE ranked **# 1** in MENA and **# 35** / 127 countries in the **Global Innovation Index**

New legislation will allow **100% foreign ownership** of UAE-based companies and facilitates **10-year visas** for investors and professionals in the medical, scientific, research and technical fields



196 Fortune 500 companies now have a **dedicated office in Dubai** to cover the MENA region

Of which, **138 companies have their Middle East and Africa headquarters in Dubai**, including some of the leading international banks



Dubai International Financial Centre



The **Dubai International Financial Centre** is named one of the world's **top 10 financial hubs** in The Banker's 2017 IFC ranking, **alongside London, New York and Hong Kong**

Dubai is a top investment destination worldwide

The UAE has moved up from 28th position in seven years to become the **7th most globally competitive country**, outperforming Norway, Sweden and Canada, according to the IMD world competitiveness ranking 2018.

The UAE is the only country in the region to feature amongst the top 10 in the World Competitiveness Yearbook 2018.

In terms of foreign investment, while the UAE was ranked **21st** in the 2017 **Foreign Direct Investment** Confidence Index, in the same year Dubai ranked **4th city globally** by number of projects and 10th city globally by foreign capital investment attracted, reaching USD 7.4bn in greenfield projects.

Dubai is recognised for its quality of life and ability to retain talent



Dubai is the number one city for **quality of living across the Middle East and Africa** region for 5 years in a row

Mercer's 2017 Quality of Living Survey



Dubai is ranked **# 10 worldwide** in HSBC's **preferred cities to live for expatriates**

HSBC's 2017 Index for preferred destinations



The UAE ranks **# 1 in the MENA region** and **# 19** / 118 countries in its ability to grow, attract and retain talent

NSEAD's 2017 global talent competitiveness index



Dubai is among **the top two biggest improvers** worldwide in five years

EIU's 2017 global livability ranking

Dubai leads the region in sustainable investment, technology and innovation



USD 27.4 billion Dubai green fund to support and finance green energy projects by 2020



Dubai is home to the regional headquarters of companies such as **Google** and **Facebook**



USD 137.7 billion to be invested in 5000MW Mohamed Bin Rashid Al Maktoum solar plant by 2030



USD 136.9 million to be invested in clean energy R&D labs by 2020



Shams Dubai project, first in region to introduce net-metering for solar power generation (Dubai Electricity and Water Authority)



With technology at the forefront, the success of **Smart Dubai** was followed by the launch of the **Internet of Things Strategy and of the Data Wealth Initiative** in October 2017

“When we launched Smart Dubai three years ago, we sought to enable people to make use of the vast amounts of data generated every day in one of the busiest cities in the world. Today, as we launch the Dubai IoT Strategy, we provide the people of Dubai with an unmatched smart lifestyle.”

Dr Aisha bint Butti bin Bishr

Director-General, Smart Dubai Office

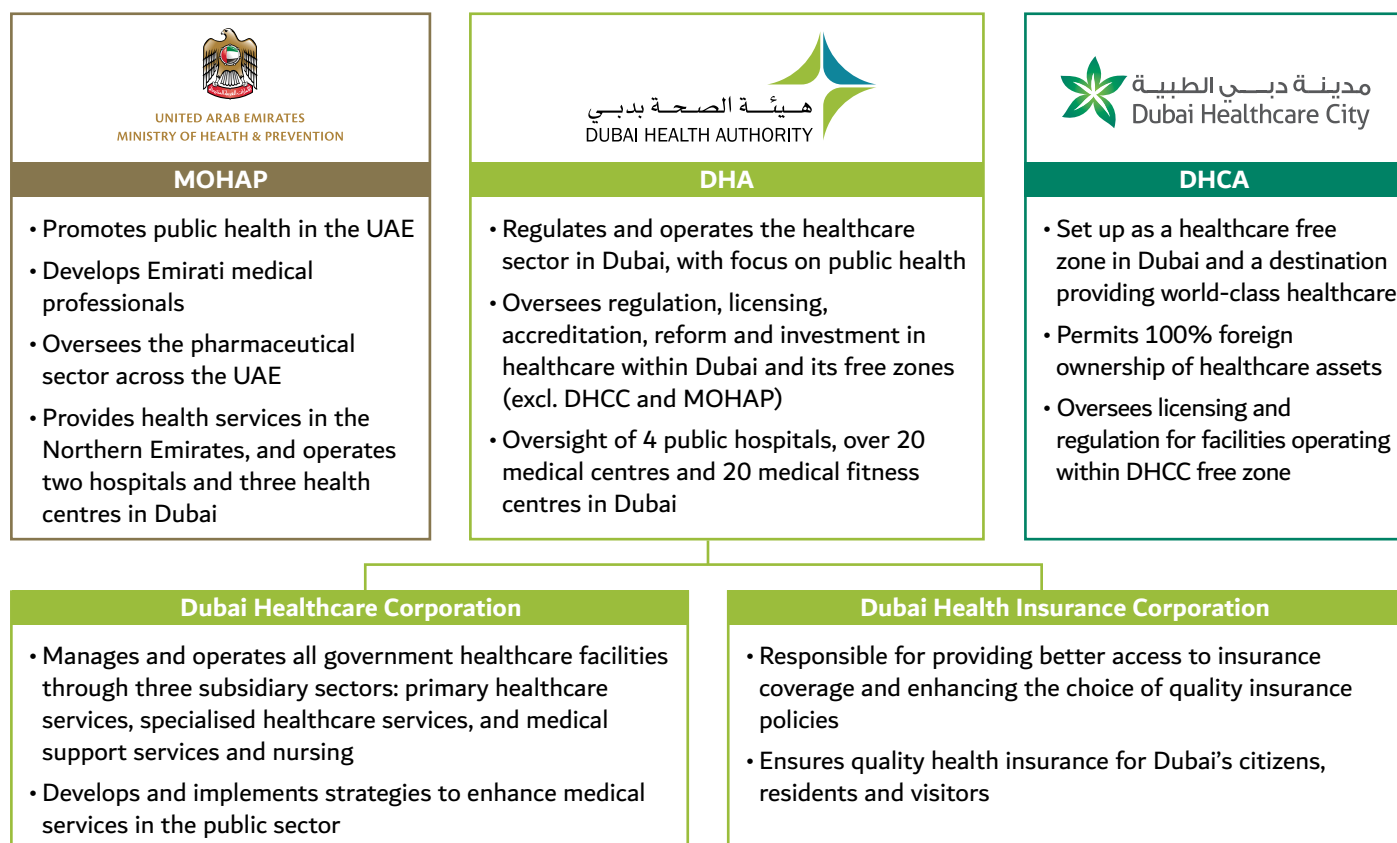


Healthcare in Dubai

Dubai Health Authority oversees the healthcare sector in the Emirate of Dubai

The Dubai Health Authority (DHA) was created in June 2007 by His Highness Sheikh Mohammed bin Rashid Al Maktoum, Vice President and Prime Minister of the UAE, Ruler of Dubai. DHA is the public organisation overseeing the health system in Dubai and its free zones (excluding DHCC) with an expansive vision that includes strategic oversight for the complete health sector in Dubai and the enhancing of private sector engagement.

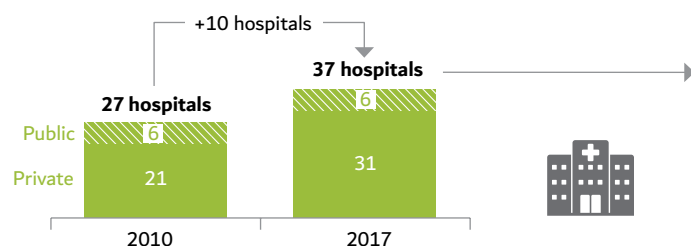
Two other agencies coexist within Dubai's healthcare sector: the Ministry of Health and Prevention (MOHAP), the federal ministry overseeing the UAE healthcare sector, and Dubai Healthcare City Authority (DHCA), a dedicated free zone. Both have a role in the regulation, licensing, funding, and management of facilities under their oversight. However, most of Dubai's healthcare facilities and professionals are overseen by DHA and only a limited number by MOHAP or DHCA.



The private sector has spearheaded the development of Dubai's healthcare infrastructure

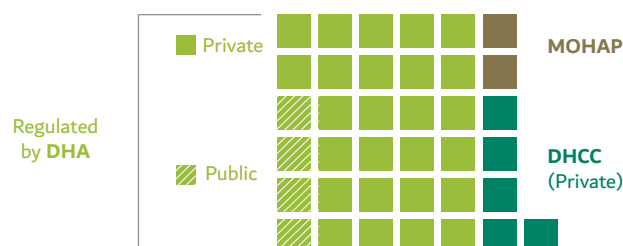
The rapid development of Dubai's domestic market and its growing role as a regional medical tourism hub has led to significant growth of its healthcare infrastructure, spearheaded by private sector investment in health services.

Figure 6: Evolution of the number of hospitals in Dubai (2010-2017, in number of facilities)



Source: DHA Annual Health Statistical Report, 2010 & 2017

Figure 7: Number of hospitals, per type of setting (2017, in number of facilities)



Source: DHA Annual Health Statistical Report, 2017



MANPOWER

In 2017,



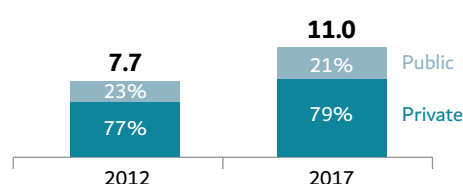
of physicians under DHA were licensed in private facilities

Source: DHA Annual Health Statistical Report 2017



OUTPATIENTS

Figure 8: Number of outpatients¹ in public and private facilities (2012-2017, in millions)

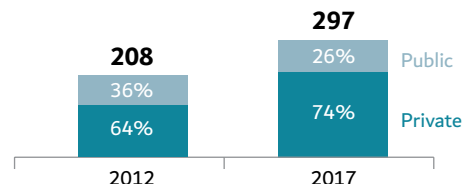


Source: DHA Annual Health Statistical Report 2012 & 2017



INPATIENTS

Figure 9: Number of inpatients in public and private facilities (2012-2017, in thousands)



Source: DHA Annual Health Statistical Report 2012 & 2017

Dubai's healthcare funding strategy supports the growth of the private sector

In 2014, a mandatory health insurance law for Dubai was enacted and rolled-out in three main phases, so that by end-2017 every employee and dependent residing in Dubai was medically insured.

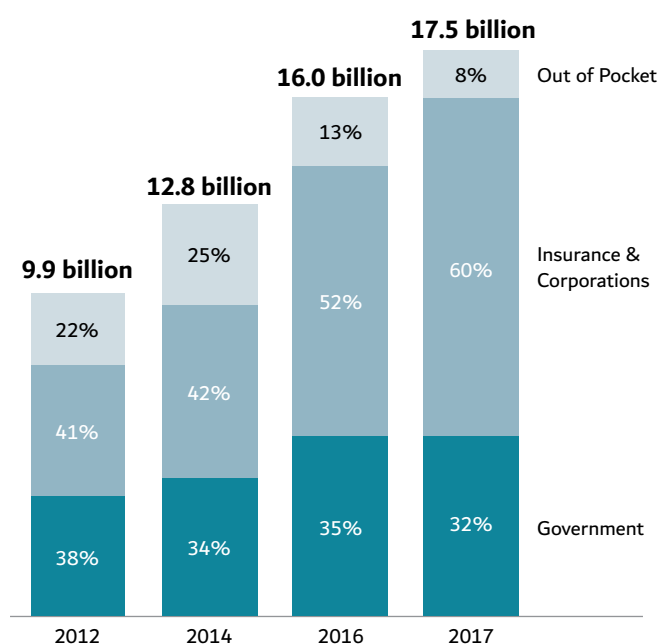


As a result, close to 100% of Dubai's population is now covered by medical insurance. While healthcare expenses have reached around AED 17.5 billion in 2017, the share of private insurance has skyrocketed to approximately 60%.



SOURCE OF FUNDS

Figure 10: Evolution of healthcare expenses, by Source of funds (2012-2017, in AED)

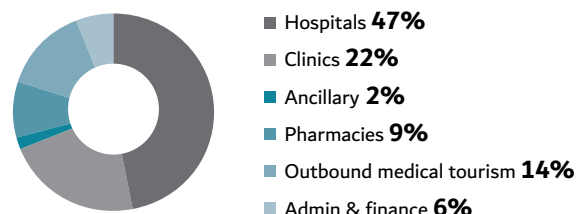


Source: Health Accounts System of Dubai 2012-2014, High level estimates from Dubai Health Insurance Corporation³



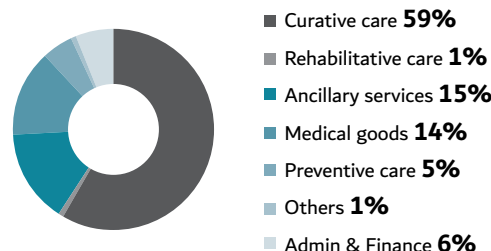
USE OF FUNDS

Figure 11: Healthcare expenses, by type of provider (2014, in % of total healthcare expenses)



Source: Health Accounts System of Dubai 2013-2014

Figure 12: Healthcare expenses, by type of care (2014, in % of total healthcare expenses)



Source: Health Accounts System of Dubai 2013-2014

1. Outpatient and Inpatient values include all facilities in Dubai regulated by Dubai Health Authority and Dubai Healthcare City Authority, and excludes those from the Ministry of Health and Prevention

2. Including spouses, children and domestic workers

3. Out of pocket expenses in 2014 included reimbursement through claim forms, accounted for starting 2016 in Insurance & Corporations

The numbers of healthcare facilities and professionals licensed by DHA have seen significant growth in recent years

Two main factors have driven the rise in numbers of healthcare facilities and of professionals licensed by DHA: population increase and the implementation of mandatory insurance.



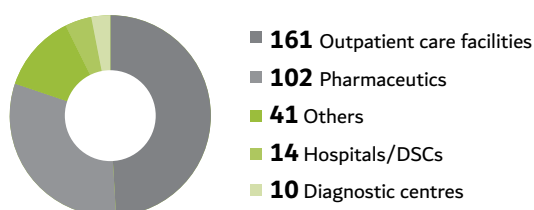
HEALTHCARE FACILITIES

23 Number of facility types

328 Number of facility licenses issued in 2017

3,098 Total number of licensed facilities²

Figure 13: New facility licenses issued by DHA (2017)



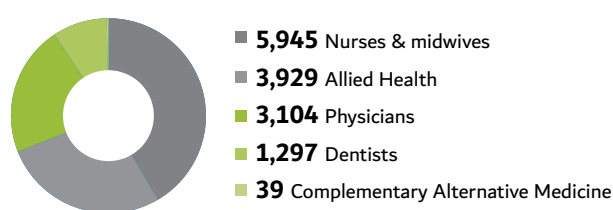
HEALTHCARE PROFESSIONALS

5 Number of professional categories

14,314 Number of professional licenses issued in 2017

38,467 Total number of licensed professionals²

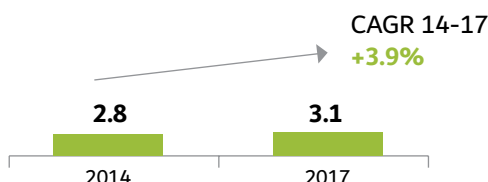
Figure 14: New professional licenses issued by DHA (2017)



Key figures

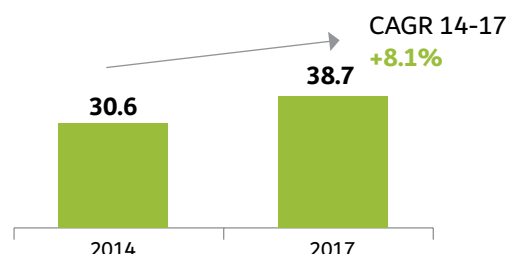
Recent evolution

Figure 15: Total number of licensed facilities by DHA (2014-2017, in thousands)



Source: DHA Health Regulation Sector

Figure 16: Total number of licensed professionals by DHA (2014-2017, in thousands)

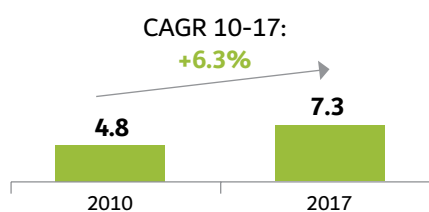


Source: DHA Health Regulation Sector



MANPOWER

Figure 17: Evolution of physicians in Dubai³ facilities (2010-2017 in thousands)

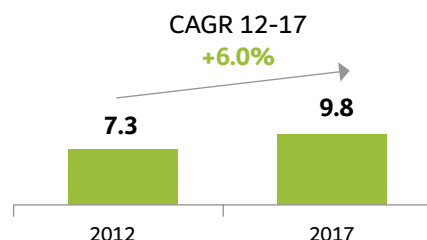


Source: DHA Annual Health Statistical Report 2010 & 2017



OUTPATIENTS

Figure 18: Evolution of outpatients in Dubai³ facilities (2012-2017, in millions)

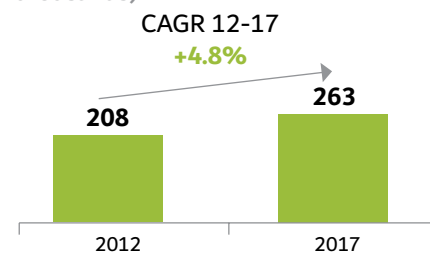


Source: DHA Annual Health Statistical Report 2012 & 2017



INPATIENTS

Figure 19: Evolution of inpatients in Dubai³ facilities (2012-2017, in thousands)

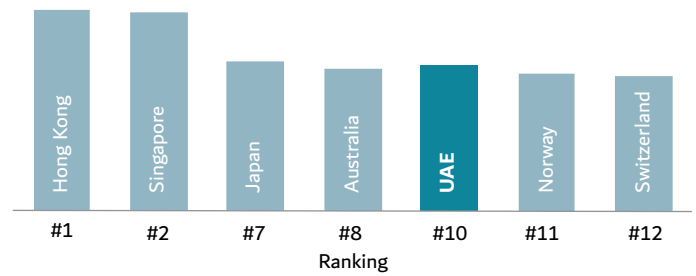


Source: DHA Annual Health Statistical Report 2012 & 2017

2. As of April 2018

3. Outpatient and Inpatient values include all facilities in Dubai regulated by Dubai Health Authority, and excludes those from Dubai Healthcare City Authority and the Ministry of Health and Prevention

The UAE is one of the top 10 economies with the most efficient healthcare sector, and ranked on top of Middle East countries...

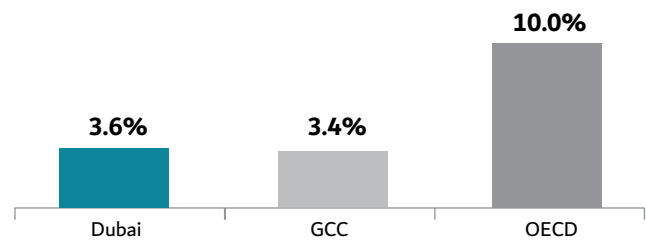


Source: Bloomberg Health-Efficiency Index, 2018

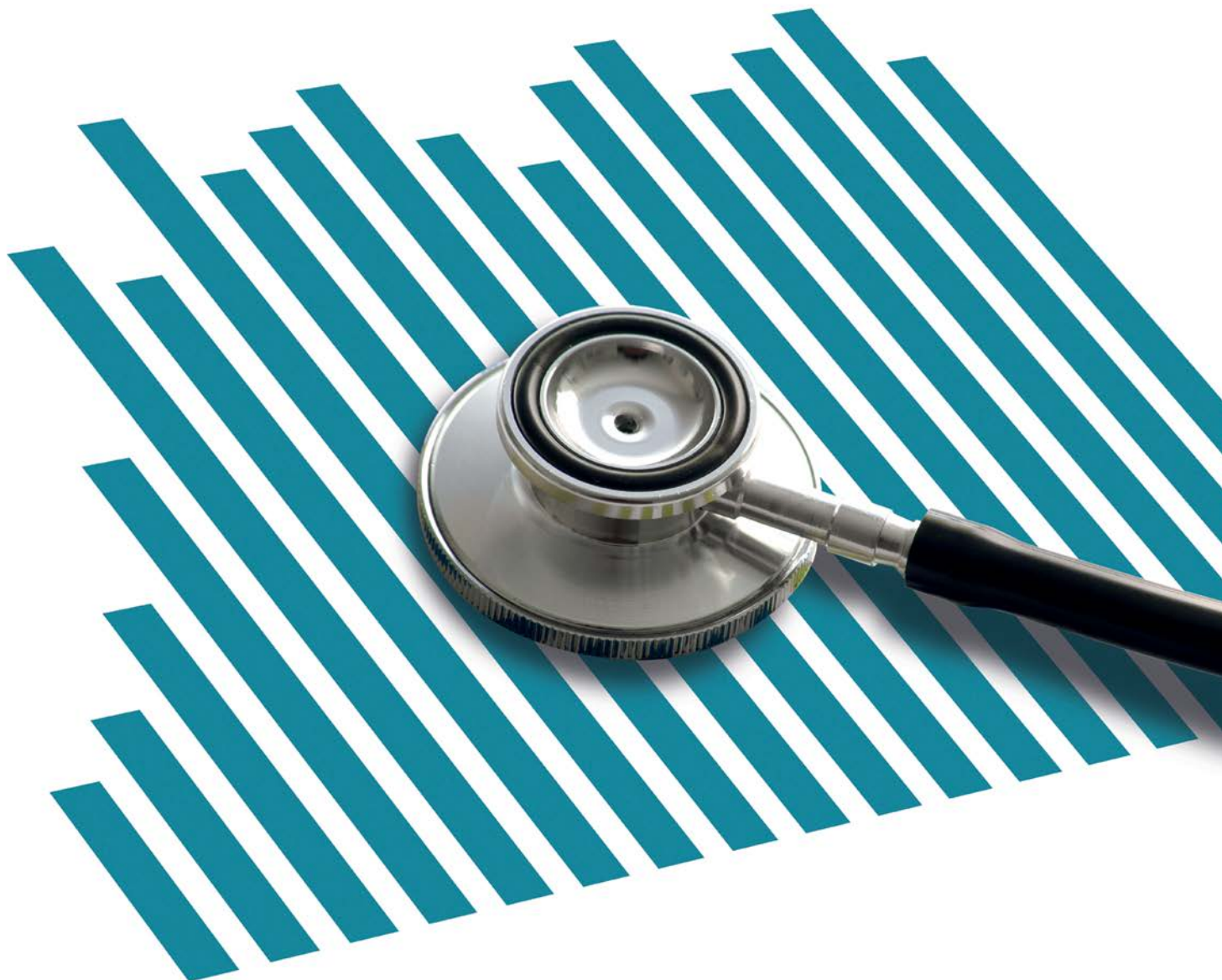
...however, despite years of positive development, substantial growth potential remains

Growth in Dubai's healthcare sector has been mostly articulated around primary and secondary care, to cope with the Emirate's dynamic demography and, despite this favorable environment, there is still considerable room for growth in the healthcare provisioning market.

Figure 20: Healthcare expenditure in Dubai vs. GCC and OECD countries (2014, in % of the GDP)



Source: World Bank, Dubai Statistics Centre - 2014



DHA Strategy 2016 – 2021

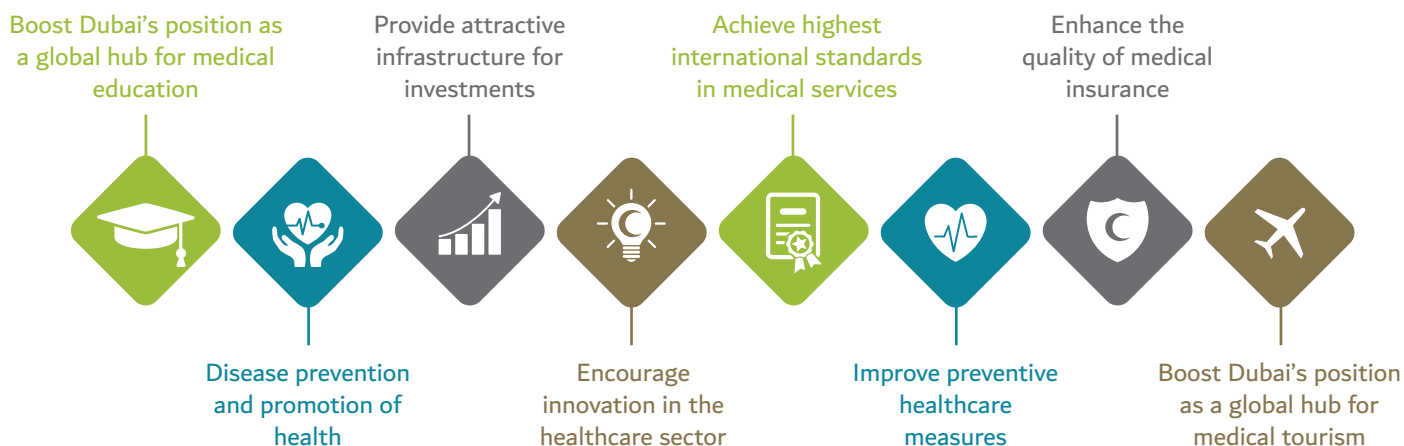
The Dubai Health Authority (DHA) was created in June 2007 by His Highness Sheikh Mohammed bin Rashid Al Maktoum, Vice President and Prime Minister of the UAE, Ruler of Dubai, with an expansive vision to include strategic oversight for the complete health sector in Dubai and enhance private sector engagement.

Founded on the four key pillars of service delivery (quality, efficiency, patients and staff), DHA aims to ensure the availability of quality medical insurance programmes, improve medical services according to the highest international standards, contribute to providing attractive infrastructure for investments, boost Dubai's position as a global hub for medical tourism and medical education, encourage innovation in the healthcare sector and improve preventive healthcare measures.

In 2018, His Highness Sheikh Mohammed bin Rashid Al Maktoum, Vice President and Prime Minister of the UAE, Ruler of Dubai, introduced further legislation to support DHA in regulating medical services in Dubai, enhancing competitiveness and transparency, improving medical services and products based on international best practices and achieving the sector's objectives according to approved strategic plans:



As part of this new strategy, DHA has defined eight objectives enabling it to build a new era in its healthcare sector:





“We want to offer the best healthcare facilities and services and attract top healthcare establishments, the best medical personnel and the most advanced technologies.”

His Highness Sheikh Mohammed bin Rashid Al Maktoum

Vice President and Prime Minister of the UAE and Ruler of Dubai

Source: DHA Media Centre, “DHA Responsibilities and tasks according to new law”, 5/11/2018

“DHA is striving to make the population of Dubai healthier and happier by providing world-class healthcare services; fostering creativity and innovation in alignment with UAE vision and Dubai plan 2021.”

His Excellency Humaid Mohammed Obaid Al Qutami

Director General, Dubai Health Authority

Source: Smart Dubai News, “DHA Creating a Smarter and Healthier Dubai”, 25/10/2017



More specifically, DHA's strategy is being implemented through 15 ambitious programmes...



CARE MODEL INNOVATION

Promotes innovation and efficiency to ensure high quality services. Introduces innovative care models to fill existing care delivery gaps



PREVENTION & HEALTH LIFESTYLE

Promotes healthy lifestyle and disease prevention interventions at the level of the community and the individual



PUBLIC HEALTH & SAFETY

Helps in defining public health standards, policies and guidelines and design organised measures to prevent disease, promote health, and prolong life



PRIMARY CARE

Ensures that all the population have access to high quality primary care in an equitable fashion



ORAL & DENTAL CARE

Ensures that all individuals have access to high quality treatments and effective prevention programmes for dental care



MENTAL HEALTH

Stimulates the development of high quality care for mental health conditions and addresses the social stigma associated with these diseases



CHRONIC DISEASE MANAGEMENT

Drives the development of speciality centres providing programmes focused on the management of chronic diseases outside the setting of acute/tertiary hospitals



CENTRES OF EXCELLENCE

Responds to the high demand for specialised and tertiary care for selected high prevalent diseases and endorses clinical research and training programmes



MEDICAL TOURISM

Focuses on promoting the development of medical tourism in Dubai, and on positioning Dubai as a global health tourism destination



EXCELLENCE & QUALITY

Promotes excellence in healthcare service delivery in Dubai while enhancing patient happiness, experience, satisfaction and trust



GOVERNANCE

(regulation & service delivery)
Improves the governance framework of Dubai healthcare sector and strengthens DHA's internal governance structure



WORKFORCE & MEDICAL EDUCATION

Aims to attract, retain, and develop the healthcare workforce in Dubai and to provide a world class medical education within the UAE



MEDICAL INFORMATICS & TECHNOLOGY

Drives the implementation of an integrated data platform across all public and private facilities in Dubai and enhances data analytics tools



HEALTH INSURANCE & FINANCING

Aims to ensure the successful implementation of health insurance law in Dubai and improve coverage and accessibility to healthcare services



INVESTMENT & PARTNERSHIPS

Promotes competitiveness and encourages foreign and domestic investments in the health sector in Dubai



INVESTMENTS AND PARTNERSHIPS

Our mission

Promote Dubai as a viable hub for investment in healthcare that addresses the needs of the Emirate and future opportunities, provides the best service for investors and enables sustainable public-private models in Dubai

Strategic objectives

1

Enhance competitiveness of the health sector in Dubai through enabling legislation to support investment, certificate of need policies to optimise capacity and publish health investment guide for investors

2

Increase awareness of the economic viability of Dubai's health sector **and attract FDI and local investments**

3

Facilitate and encourage investments to **address current gaps and future opportunities** within the health sector that align with Dubai Health Strategy 2016-2021 priorities while producing optimal returns as win-win methods

4

Develop the need apparatus to **provide a sustainable public-private investment model to enable and facilitate future investment activity** within Dubai's health sector



"To meet the developments and growing private sector investment in the Dubai healthcare sector, the DHA is developing its regulatory standards to ensure the delivery of high medical standards that exceed expectations, and to provide the Emirate with skilled and highly qualified health professionals."

Dr. Marwan Al Mulla

CEO, Health Regulation Sector, DHA



"In the UAE, we have a stable and attractive investment climate and enthusiasm from global investors to tap into the potential of the market. The diverse population, supported by increasing numbers of expats entering the market to pursue their dreams and careers, encouraged by the recent changes in the residence visa rules, will continue to drive the demand for high quality medical services that are affordable and easily accessible. This demand is also powered by the value for money approach of the middle to lower-income segments of the population that previously would delay treatment till they reached their home country or did not have access or means to afford good care. With health insurance being made a mandatory requirement for all, today we have this segment of the population seeking best quality healthcare within the Emirate of Dubai."

Alisha Moopen

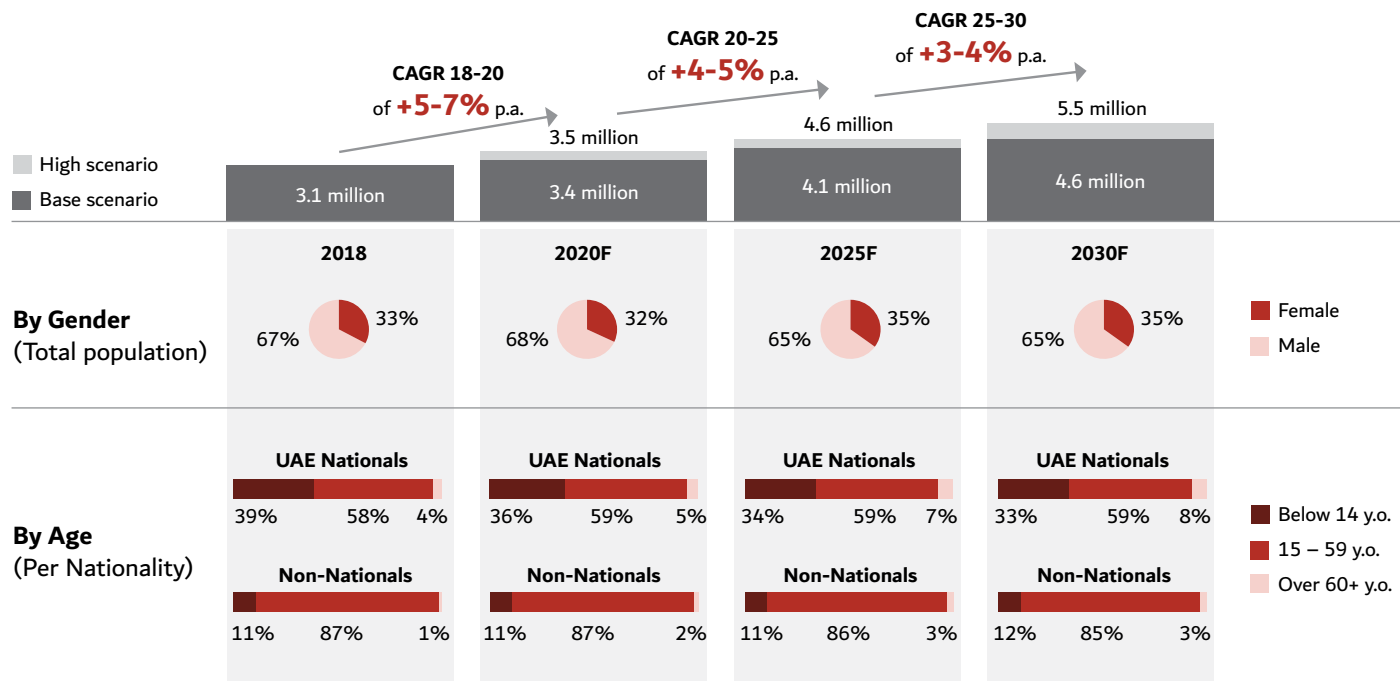
Executive Director and CEO, Aster DM Healthcare-Aster & Medcare Hospitals & Clinics, GCC

Drivers for Health Investment in Dubai

1 A growing population entails a greater need for health services

Dubai's population is expected to reach between **4.6 and 5.5 million inhabitants** by 2030

Figure 21: Growth of Dubai's population, per type (2018-2030, in inhabitants)



Source: DHA Clinical Services Capacity Plan 2018-2030, Base scenario



Dubai's population is one of the **fastest growing in the world**: growth averaged **6.4% p.a.** between 2012 and 2016. It is predicted to reach around **5% p.a.** over the **2018 - 2020** period and around **3% p.a.** over the **2020 - 2030** period



The share of **UAE Nationals aged 60 y.o. and over** is expected to **increase from 4% in 2018 to 8% in 2030**



In 2017, **elderly UAE Nationals (60+ y.o.)** accounted for only **4% of Dubai's Emirati population** but for about **22% of SAADA's expenses**

2

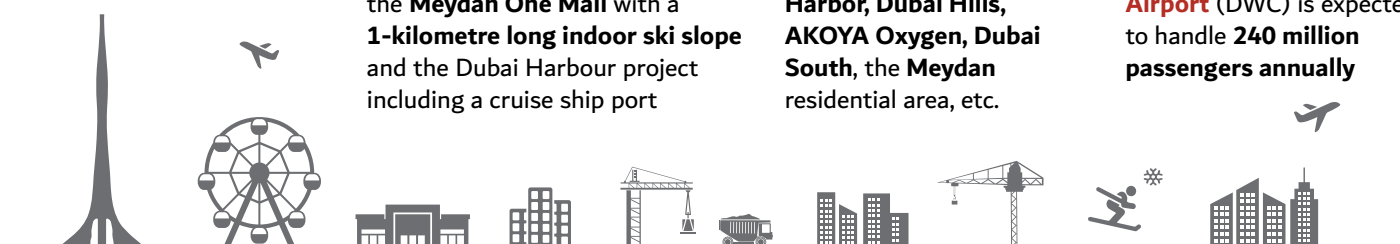
Landmark projects and infrastructure support the development and growth of the healthcare sector

Dubai Expo 2020 is set to host **25 million visitors** from all around the world. Key infrastructure development is currently underway, funded by a budget exceeding USD 8 billions

Major touristic and leisure attractions will be completed over the coming years: **Dubai Creek Harbor** with the world's tallest building Dubai Creek Tower, **Bluewaters Island** featuring the world's largest observation wheel, the **Meydan One Mall** with a 1-kilometre long indoor ski slope and the **Dubai Harbour** project including a cruise ship port

Numerous and diverse upcoming **residential communities** ranging from **affordable housing** to **upscale complexes**, villas and exclusive penthouses: **Dubai Creek Harbor**, **Dubai Hills**, **AKOYA Oxygen**, **Dubai South**, the **Meydan** residential area, etc.

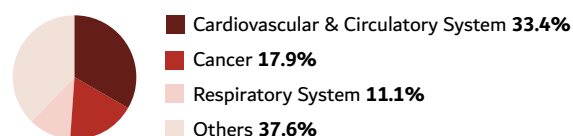
Dubai has invested **\$12 billion since 2008** to boost capacity at **Dubai International Airport (DXB)** to **90 million passengers annually**, and **Al Maktoum International Airport (DWC)** is expected to handle **240 million passengers annually**



3 A high prevalence of chronic and non-communicable diseases indicates an increased need for health services and for associated tertiary care expertise and chronic disease management

Cardiovascular diseases and **cancer** were the **main causes of mortality** in Dubai in 2016, accounting for **over 51% of deaths**

Figure 22: Causes of mortality in Dubai's population (2016, in percentage of deaths)



The UAE is amongst the countries with the **highest prevalence of cardiovascular diseases**, up to **3 times higher** than in some developed countries



Figure 23: Age standardised mortality rate due to cardiovascular diseases per 100,000 inhabitants (2014¹, in number of deaths)

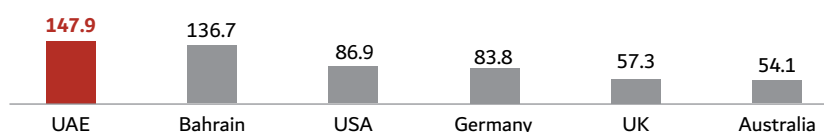


Figure 24: Prevalence ratio of diabetes in population aged 20 to 79 (2017², in percentage)



Diabetes is a **critical condition** across the UAE adult population, with a **prevalence ratio 2 to 4 times higher** than in some developed countries

The **prevalence of overweight** in the UAE reached **34.5%**, equivalent to 5 to 10 times that in Singapore or Japan



Figure 25: Prevalence ratio of overweight people in adult population (2016, in percentage³)

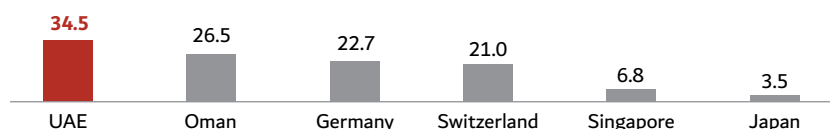
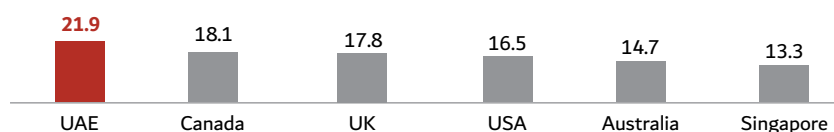


Figure 26: Prevalence ratio of smoking adults (2014, in percentage⁴)



The share of **cigarette smoking adults** reached **21.9%** of the UAE population, at least **3.8 pts more** than in some developed countries



“Rise in ageing population, rising prevalence and risk factors for chronic diseases, and changes in technology and new innovations in the delivery of care are factors that will change the global healthcare landscape and the demand for health services in the UAE in the next decade.”

Dr. Ibtesam AlBastaki

Director, Investment and PPP's Department, DHA

1. WHO, World Bank, UNESCO

3. WHO

2. World Bank report

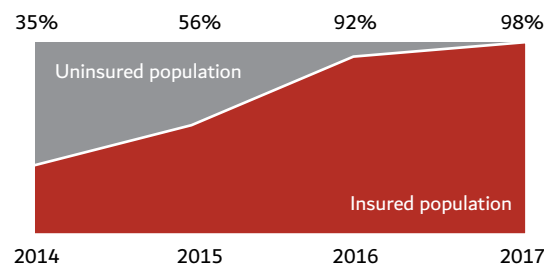
4. 2014 or best estimate

4

Health coverage for all of Dubai's population sustains the development of the healthcare sector for both residents and tourists

Close to 100% of Dubai's population benefits from **health coverage** after introduction of the mandatory health insurance law in 2014

Figure 27: Share of insured population in Dubai (2014-2017, in percentage)



In 2017, some **60%** of health expenditure was covered by **private insurance**

The **prevention** and **early detection** landscape is **changing rapidly**, as illustrated by **screening services newly included** as part of mandatory health insurance for: diabetes, heart disease, new born, developmental screening, and cancer (breast, colorectal and cervical)



"Dubai's healthcare market has sustainable long-term fundamentals, driven by a diversifying economy and a population which continues to grow. Dubai's Government is committed to developing its healthcare sector by providing an attractive investment environment and introducing positive regulatory measures. Mediclinic is proud to have supported them in this endeavour over the past 10 years by delivering superior international standards in patient experience and clinical excellence."

David Hadley

Chief Executive Officer, Mediclinic Middle East

5

Private sector utilisation has grown significantly and will continue to rise

Over the 2012-2017 period, **demand² for healthcare services** in Dubai **increased** at a **faster pace in the private setting** than in the public sector: **+7.9% p.a. vs. +5.0% p.a.** for outpatients and **+10.7% p.a. vs. +0.5% p.a.** for **inpatients**

Figure 28: Number of outpatients in Dubai² (2012-2017, in million patients)

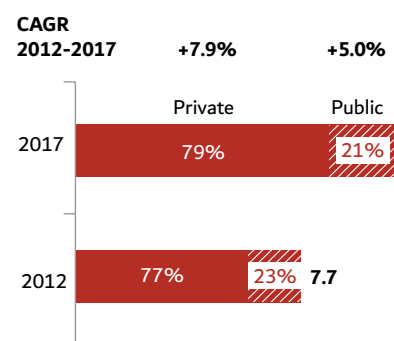
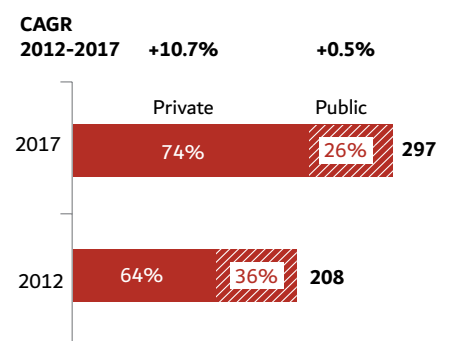


Figure 29: Number of inpatients in Dubai² (2012-2017, in thousand patients)



A supply-gap exists in specific types of services.
This is an opportunity for private sector investment in:



Centres of Excellence in tertiary care



Rehabilitation and Physical Therapy, and **Long-term care**



Chronic Disease Management



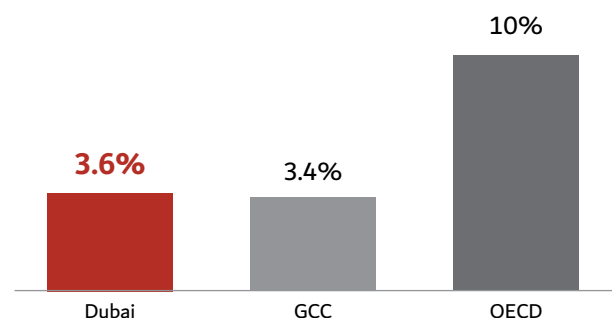
Mental Health



Ambulatory Care

There is room for further growth in the healthcare sector in Dubai

Figure 30: Healthcare expenditure in Dubai vs. in GCC and OECD countries¹ (2014, in % of GDP)



1. IMD world competitiveness ranking 2018

2. Outpatient and Inpatient values include all facilities in Dubai regulated by Dubai Health Authority and Dubai Healthcare City Authority, and excludes those from the Ministry of Health and Prevention

6

Dubai is supporting and embracing the digital revolution and innovation in the healthcare sector



Dubai Future Accelerators explored cutting edge technologies in **neurorehabilitation technology, medical imaging** and **health monitoring** in 2018



A clear licensing process exists for **telehealth companies** in Dubai, enabling the Emirate to take a share of a global telehealth market estimated to reach **6 billion people** and that will see annual growth of around **13%** between 2017 and 2025



The launch of an **electronic record (NABIDH)** for **all patients in Dubai**, to be implemented in **all public and private facilities**, and that will eventually be linked to the MOHAP unified medical record



The implementation of an **electronic hub** to **manage insurance claims** in real time

KEY APPLICATIONS

Revolutionary usage of **3D printing** playing a **key role** in **procedural planning, quality assurance and advanced education**:



Minimises risks and maximises positive outcomes



Visual aids guide and educate trainees



Speeds-up surgery time

3D printing has already been used in **kidney assistance surgery** and in **catheter-based interventional procedures**

Use of **robotic surgery** to **perform complex procedures** with **greater precision** than with traditional methods in specialities such as:



Cardiology



Orthopaedics



OBGYN



“Dubai is working towards achieving higher goals in the Global Competitive Index by promoting transparency and by improving quality of services based on international best practices. Access to a robust healthcare system as a fundamental right of every citizen shall go a long way in achieving Dubai’s objective, and DHA’s focus on clinical innovation and technology to support and enhance quality in healthcare is commendable.”

Prashant Mangat

CEO and Executive Director, NMC Health Plc.



7 A leading position as a health tourism hub with scalable growth opportunities



Over **326,000 health tourists** were welcomed in Dubai in 2016, generating over **AED 1 billion** in total healthcare revenue. DHA's objective is to attract over **500,000 health tourists** by 2020



In 2016, **37%** of health tourists came from **Asia** and **15%** from **Europe**



A **travel insurance programme** specifically designed for health tourists travelling to Dubai has been introduced to support health tourism

The top four specialities requested by health tourists are:



Orthopaedics



Ophthalmology



Dental



Fertility Treatment



"Dubai has a growing and efficient health system supported by proactive regulatory reforms. The Private Sector plays a dominant role and is expected to continue to grow given health insurance programmes and other initiatives by the Government with the aim of providing affordable, accessible and high-quality health services to the patient population."

Abhishek Sharma

Chief Executive Officer, Foundation Holdings

8 A positive investment climate and support from DHA in building the future of the healthcare sector

Dubai is one of the most **investor-friendly destinations in the world**

Home to
196
regional offices
of Fortune 500
companies

7th
most globally
competitive
country¹

100%
repatriation
of capital and
profits

1st
in MENA as
per the Global
Innovation
Index



Two dedicated free zones, DHCC and DSP, are aiding the development of the **healthcare, wellness and pharma** and **other life-science sectors**



New legislation will soon allow **100% foreign ownership of onshore companies** and a new **10-year visa** will be available to investors and professionals in the medical, scientific, research and technical fields.



DHA's **Investments and PPPs department** provides **strategic support and facilitation to investors**



"Our success in the UAE certainly can be credited also to Dubai as the centre of one of the world's fastest-growing emerging markets, with a rising population, burgeoning middle class, focus on progress and innovation in healthcare and the rigorous and ever-evolving regulation as well as the government's continued focus on spurring innovation and growth."

Chad Floe

Operating Partner, TVM Capital Healthcare

1. Source: World Bank, Dubai Statistics Centre - 2014



Health Investment Needs and Opportunities

DHA through its Strategy Plan 2016-2021 has developed a comprehensive Dubai Clinical Services Capacity Plan 2018-2030 that:

- Assesses and estimates the overall healthcare demand based on adjusted utilisation rates
- Defines healthcare needs by geography, specialties and types of services
- Determines how these needs will be met, including a detailed current and future health supply capture
- Maps the health services capacity gaps that would enable health investments in priority areas

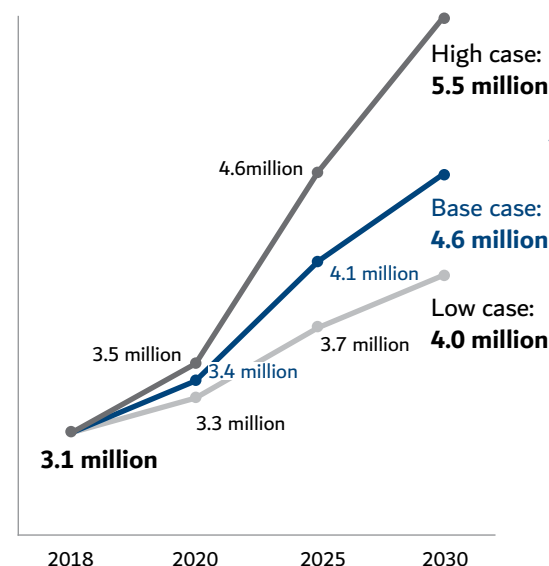
This section provides an overview of the most relevant investment opportunities in Dubai's healthcare sector by analysing supply-demand gaps in its main components: outpatient visit rooms, acute inpatient beds, physicians and other key planning units.

Three scenarios have been defined based on the population's forecasts, expecting an annual growth between 2.6% and 5.6% p.a. between 2015 and 2030. The base case, which expects an growth of about 3.8% p.a. over the same period, is considered the most likely scenario and is used to forecast demand and capacity gap in health services throughout this section.



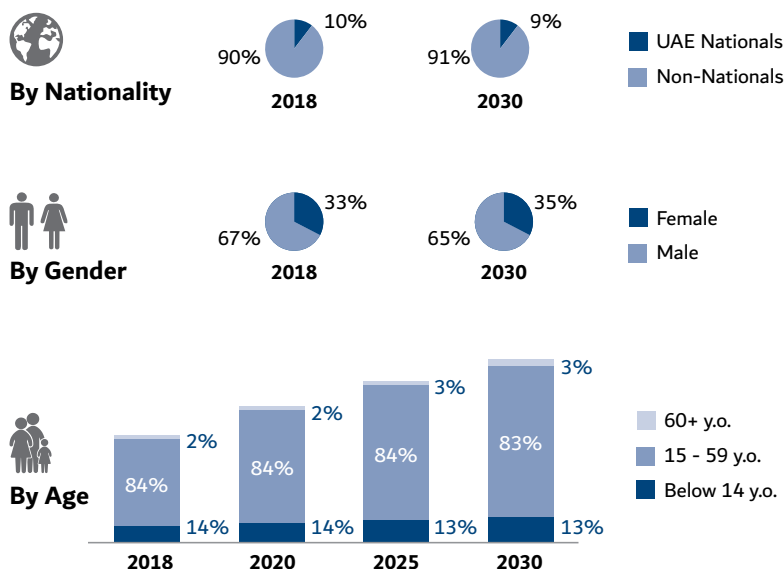
Dubai population projections, by type, 2018-2030

Figure 31: Forecasted evolution of Dubai's population (2018-2030, in number of inhabitants)



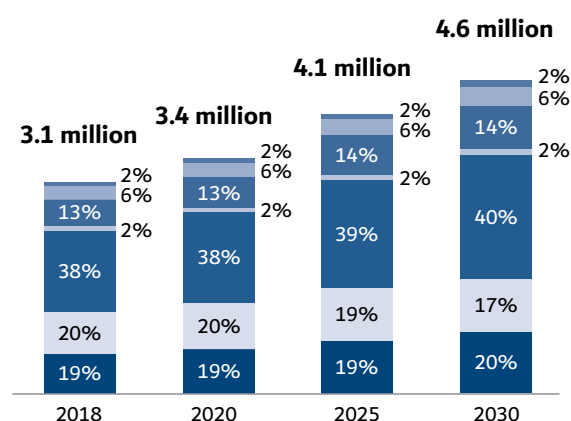
Source: DHA Clinical Services Capacity Plan 2018-2030, Base scenario

Figure 32: Forecasted breakdown of Dubai's population, by type (base case, 2018-2030, in percentage)



Dubai population projections, by sector, 2020-2030¹

Figure 33: Forecasted breakdown of Dubai's population, by sector (base case, 2018-2030, in number of inhabitants)



Nine sectors have been defined to analyse the evolution of Dubai's population which include, but are not limited to:

- Sector #1: Deira, Hor Al Anz, Abu Hail, Al Murqabat
- Sector #2: Nahda, Al Quasis, Al Garhoud, Al Twar, Muhaisanah
- Sector #3: Jumeirah, Palm Jumeirah, Al Quoz, Al Barsha, Al Karama
- Sector #4: Meydan, Al Warqaa
- Sector #5: Jebel Ali, Dubai Marina, JLT
- Sector #6: Al Barsha south, Arabian Ranches, Motor city, Sports city, Warsan (1st, 2nd, 4th), Nad Al Shibba
- Sector #7: Mirdif, International city, Al Aweer
- Sector #8: Silicon oasis, Warsan (3rd), Academic city, the Villas
- Sector #9: Al Lesaily, Umm Nadad

1. Preliminary results from Dubai Clinical Services Capacity Plan 2018-2030, developed by TAHPI

1 Base case: Preliminary gaps for Outpatient Visit Rooms (2018-2025)¹



Gap analysis by specialty, in no. of outpatient rooms required (base case, 2018-2025)

Specialty	Gaps (base case)			Specialty	Gaps (base case)		
	2018	2020	2025		2018	2020	2025
Primary Care	524	696	1,218	Nursing care & Allied health	357	463	761
Orthopaedics and Rheumatology	77	31	75	Trauma and Injury	27	32	44
Respiratory Medicine	10	20	37	Neurology	1	12	35
Immunology & Infections	11	15	26	Vascular Surgery	4	7	16
Endocrinology	33	21	13	Urology	41	27	12
Oncology	8	4	11	Renal Medicine	2	3	11
Haematology	1	3	7	Neonatology	3	4	6
Gastroenterology	47	35	0	Dentistry	26	19	4
Psychiatry	66	53	23	Paediatrics	181	136	26
Neurosurgery	32	31	28	General Surgery	90	73	32
Ophthalmology	113	93	33	Cardiology & Cardiothoracic Surgery	119	102	58
ENT, Head & Neck	107	97	72	Plastic Surgery	185	181	174
Obstetrics	244	233	216	Dermatology	300	291	278
General Medicine	497	456	348	Gynaecology	423	408	353

Projections are based on the following assumptions:

- 248 operational days per year
- 8 operational hours per day
- 70% planning occupancy per consultation room
- Adjustments for National and Non-national utilisation based on current trends
- Nursing demand has been split between adult and paediatric Hospital modes, no supply captured but absorbed by other consultation rooms

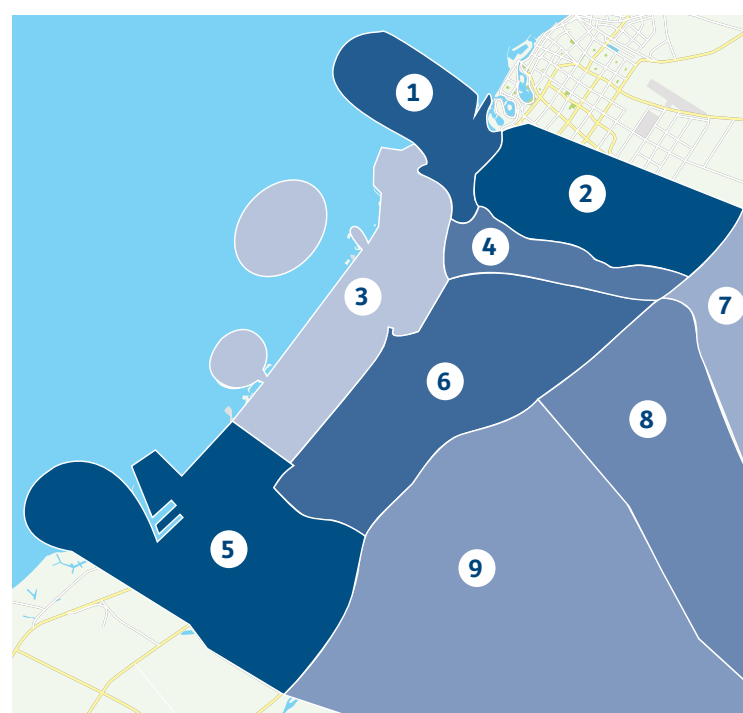
Legend

- Oversupply
- Undersupply - Investment needs



Gaps by sector, in number of additional outpatient rooms required (base case)

As per the base case, the forecasted additional outpatient rooms required by 2018, 2020 and 2025, all specialties included, are as follows:



Sector 1 2018: 140 rooms 2020: 31 rooms 2025: 275 rooms	Sector 2 2018: 16 rooms 2020: 101 rooms 2025: 334 rooms
Sector 3 2018: 1,728 rooms 2020: 1,468 rooms 2025: 713 rooms	Sector 4 2018: 6 rooms 2020: 16 rooms 2025: 45 rooms
Sector 5 2018: 244 rooms 2020: 322 rooms 2025: 539 rooms	Sector 6 2018: 51 rooms 2020: 18 rooms 2025: 75 rooms
Sector 7 2018: 7 rooms 2020: 9 rooms 2025: 15 rooms	Sector 8 2018: 16 rooms 2020: 23 rooms 2025: 44 rooms
Sector 9 2018: 9 rooms 2020: 11 rooms 2025: 16 rooms	Legend Oversupply Undersupply - Investment needs

1. Preliminary results from Dubai Clinical Services Capacity Plan 2018-2030, developed by TAHPI

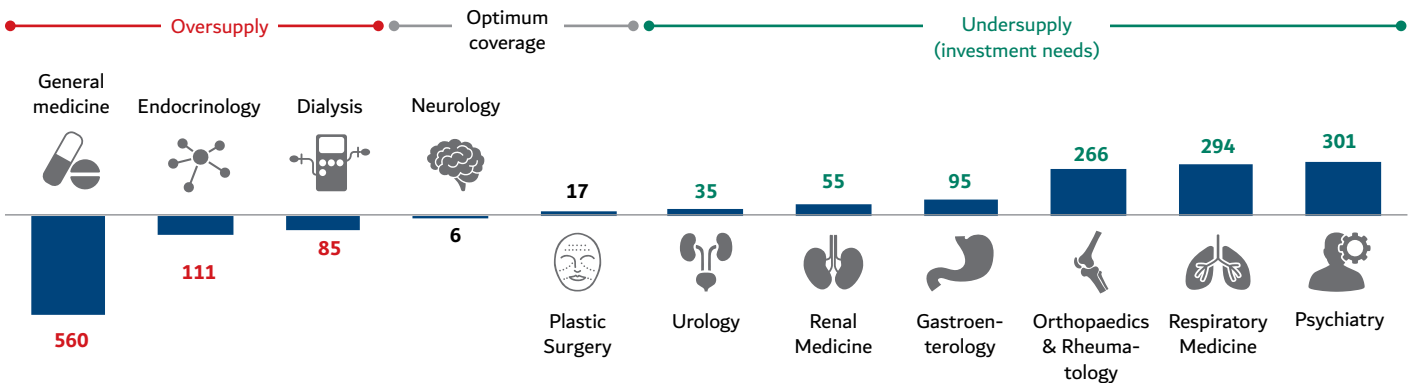
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Base case: Preliminary gaps for Acute Inpatient Beds (2018-2025)¹

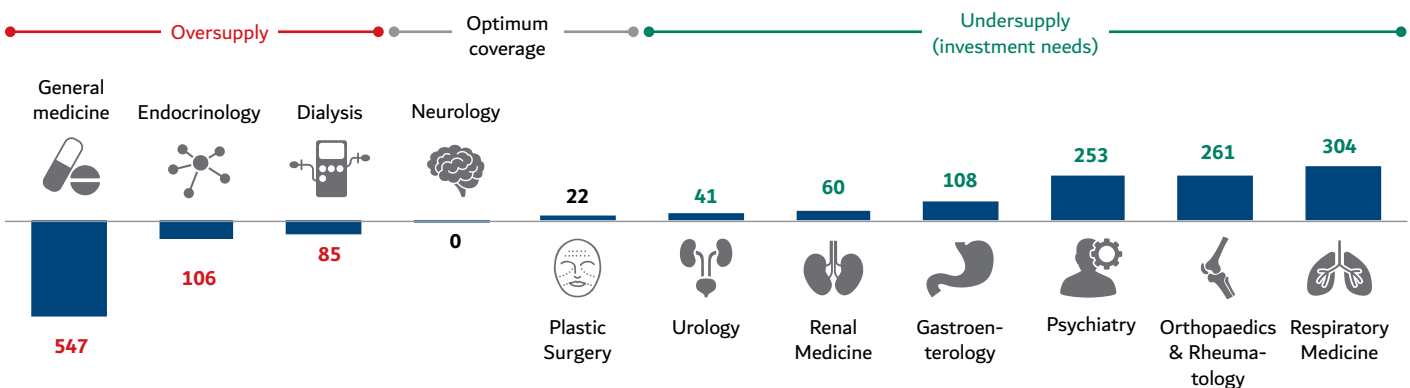
Gaps by specialty, in no. of additional acute inpatient beds required (base case)

As per the base case, the forecasted additional outpatient rooms required by 2018, 2020 and 2025, all specialties included, are as follows:

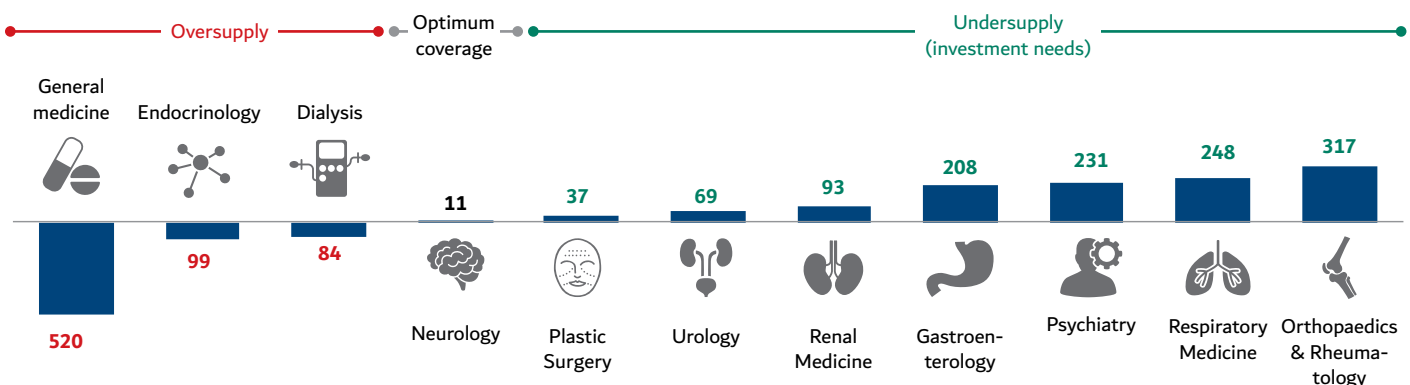
2018



2020



2025



Projections are based on the following assumptions:

1. 70% planning occupancy per acute bed
2. Trauma is split into supply by surgical specialty proportions
3. Adjustments for National and Non-national utilisation based on current trends
4. Adjustments of the Average Length of Stay based on current utilisation rates
5. Planned bed supply (445 beds in 2018, 742 beds in 2020 and 1,043 beds in 2025) has been allocated based on probabilistic assumptions on demand and supply to the various specialties

1. Preliminary results from Dubai Clinical Services Capacity Plan 2018-2030, developed by TAHPI

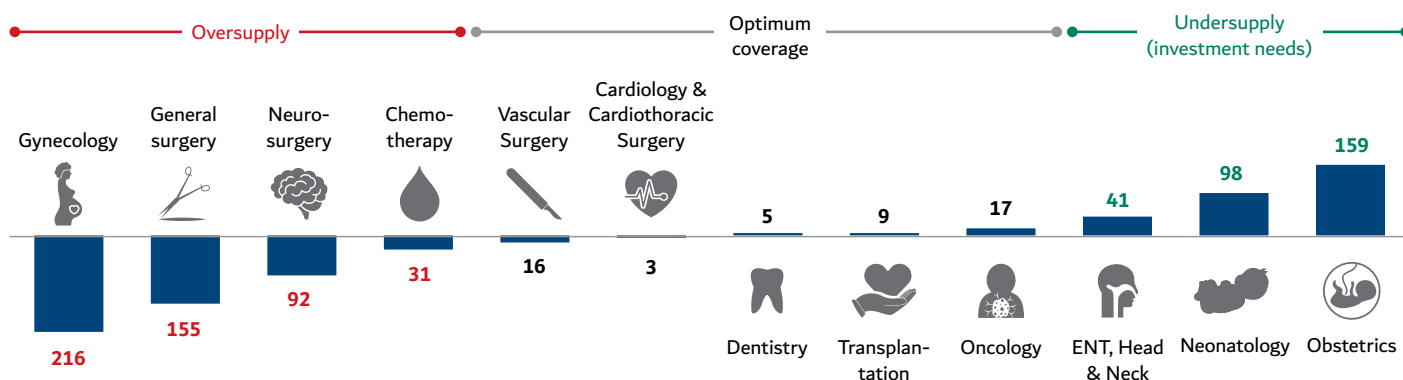
2

Base case: Preliminary gaps for Acute Inpatient Beds (2018-2025)¹

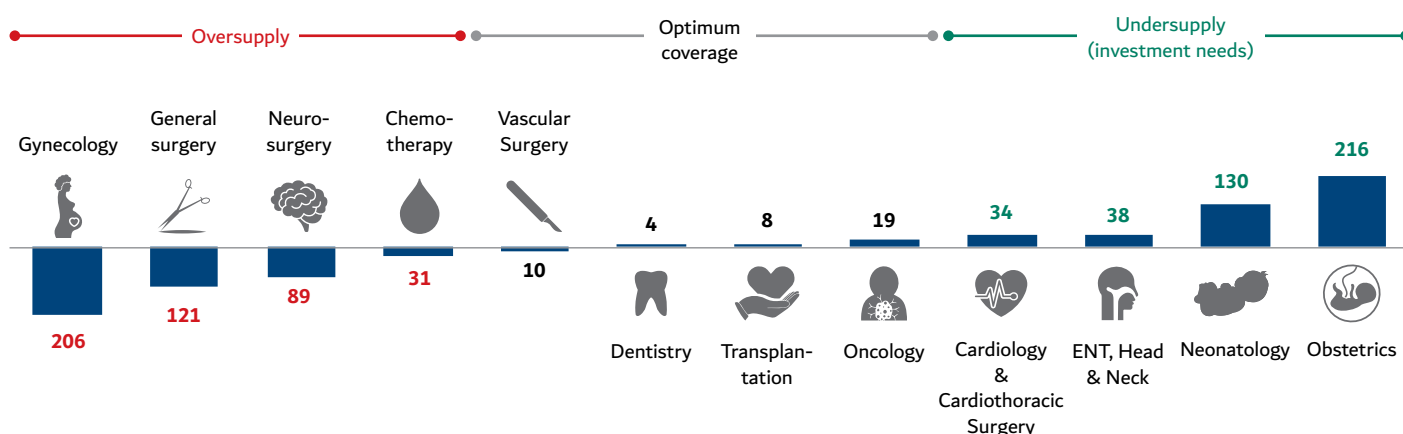
Gaps by specialty, in no. of additional acute inpatient beds required (base case)

As per the base case, the forecasted additional outpatient rooms required by 2018, 2020 and 2025, all specialties included, are as follows:

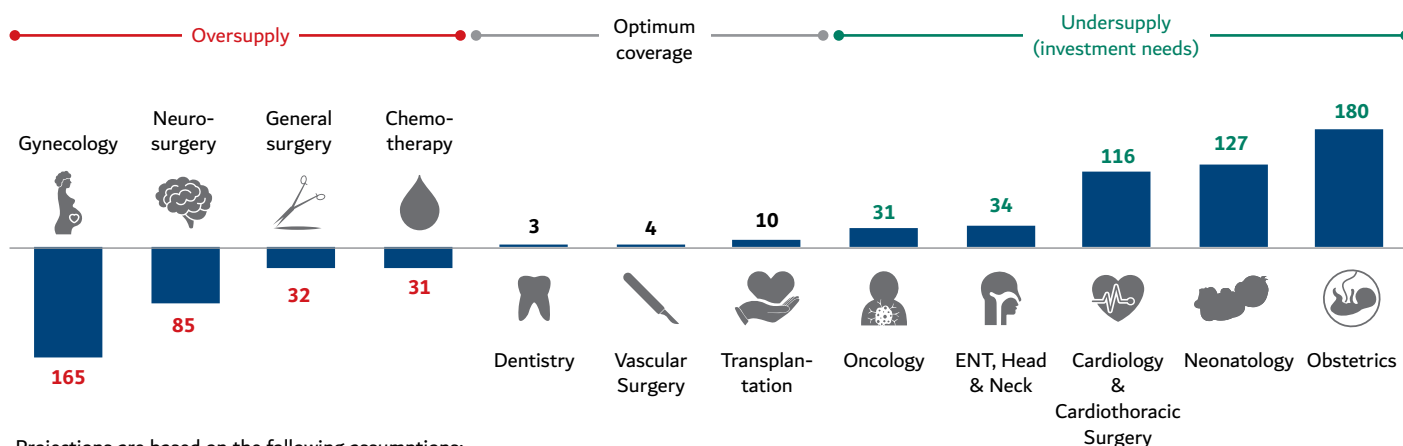
2018



2020



2025



Projections are based on the following assumptions:

1. 70% planning occupancy per acute bed
2. Trauma is split into supply by surgical specialty proportions
3. Adjustments for National and Non-national utilisation based on current trends
4. Adjustments of the Average Length of Stay based on current utilisation rates
5. Planned bed supply (445 beds in 2018, 742 beds in 2020 and 1,043 beds in 2025) has been allocated based on probabilistic assumptions on demand and supply to the various specialties

1. Preliminary results from Dubai Clinical Services Capacity Plan 2018-2030, developed by TAHPI

3 Zoom into: Other Key Planning Units¹



Operating Theatres








Supply-demand analysis, in number of operating theatres (base case)

Type	Supply			Demand			Gaps (base case)		
	2018	2020	2025	2018	2020	2025	2018	2020	2025
Overnight Elective	Estimates pending final validation, expected by Q1 2019								
Overnight Emergency									
Same Day Elective									
Same Day Emergency									



Procedural Care Units

Supply-demand analysis, in number of units, per type (base case)

Type	Supply			Demand			Gaps (base case)		
	2018	2020	2025	2018	2020	2025	2018	2020	2025
 Ultrasound	Estimates pending final validation, expected by Q1 2019								
 X-Ray									
 Computed tomography									
 Mammography									
 Magnetic resonance									
 PET scan									
 Others									

1. Preliminary results from Dubai Clinical Services Capacity Plan 2018-2030, developed by TAHPI

3 Zoom into: Other Key Planning Units¹ (cont.)



Emergency Departments

Supply-demand analysis, in number of emergency places (base case)

Type	Supply			Demand			Gaps		
	2018	2020	2025	2018	2020	2025	2018	2020	2025
Class #1 (Immediate life threat)	Estimates pending final validation, expected by Q1 2019								
Class #2 (Imminent life threat)									
Class #3 (Potential life threat)									
Class #4 (Serious)									
Class #5 (Less urgent)									



Intensive Care Units

Supply-demand analysis, in number of intensive care units (base case)

Type	Supply			Demand			Gaps		
	2018	2020	2025	2018	2020	2025	2018	2020	2025
General (ICU and CCU)	Estimates pending final validation, expected by Q1 2019								
Paediatric (PICU)									
Neonatal (NICU)									



Non Acute Overnight Beds

As per the base case, the forecasted requirements in terms of non-acute overnight beds per type, are as follows:



Rehabilitation

Gaps (in no. of beds):

2018: - beds 2020: - beds
2025: - beds 2030: - beds

Estimates pending final validation, expected by Q1 2019



Long-term care

Gaps (in no. of beds):

2018: - beds 2020: - beds
2025: - beds 2030: - beds

Estimates pending final validation, expected by Q1 2019

1. Preliminary results from Dubai Clinical Services Capacity Plan 2018-2030, developed by TAHPI

Snapshot of investment focus areas to address continuum of care needs



Long-term care and Rehabilitation

- Several medical conditions and disorders, treated under Orthopedics, Neurology, Cardiology, and Oncology disorders require extended rehabilitation and/ or physical therapy
- Multiple studies indicate the burden of conditions treated under these specialties such as: around 1 in 59 children suffer of autism, 1 in 12 has had a disorder related to speech or language in the past year, while a global average of 20% of people aged 20-59 suffer from chronic back pain
- WHO estimates that approx. 15% of the world's population lives with some form of disability and that 2% to 4% suffer from severe disability, the equivalent of disability inferred from quadriplegia, blindness or severe mental disabilities, requiring for specialized care services, physiotherapy, speech/ learning therapy, etc.
- In addition, U.A.E.'s population above the age of 65 is estimated from 1% at present to 3% by 2030, based on Dubai's latest forecasts. This will stimulate demand for healthcare in general and geriatric care in particular. Hence, together, the above conditions, and an ageing population drive the need for Long-term care and Rehabilitation to be provided in Dubai
- Estimates indicate 317 IP beds alone are required in Dubai by 2025, for Orthopedics and Rheumatology, which is a major contributor to demand for physical therapy and musculo-skeletal rehabilitation
- Investments should focus on building specialized centers for rehabilitation, introducing home health and telehealth for consultations, in addition to remote monitoring for less complex cases, etc.



Chronic disease management

- In 2017 alone 4% of SAADA patients (all UAE Nationals) accounted for 22% of the health spending on chronic disease management programs. These programs have been introduced based on the prevalence of non-communicable diseases which is particularly high in UAE, where NCDs account for 76% of all deaths, more than 17% of the population suffers from diabetes (20-79 y.o.y), 35% are overweight, and cardiovascular diseases are up to 3 times higher than in some developed countries
- Chronic disease management can benefit immensely from investments in ambulatory care centers. Dedicated programs that allow home care, and remote monitoring can considerably lower costs instead of occupying inpatients beds. In addition, telehealth could also support patient's monitoring post-surgery or discharge



Urgent care

- Set up of Urgent care walk-in clinics could help reduce the pressure on ER's in acute hospitals, and also help address the challenge of rising costs from the utilization of health services in more expensive settings
- Approx. ~60% of cases reported in emergency departments in Dubai hospitals are not urgent in nature
- By 2025, more than 1,200 OP rooms in Dubai are needed, and these predominantly can address the needs of low income population who are estimated to be 57% of the insured base
- Telehealth applications and services could also collaborate with Urgent care clinics to triage patients, reduce waiting times and improve access to care



Tertiary care

- It is estimated that more than 124 additional OP rooms and 331 IP beds are required in Dubai by 2025, only when looking at gaps under specialties like Oncology, Neurology, Vascular Surgery, Immunology, and Respiratory medicine
- While it is estimated that more than 15 OP rooms and 115 IP beds are required in Dubai by 2025 for Cardiovascular surgery and Cardiology & cardiothoracic surgery
- Dedicated specialized centers are the most convenient set-up to treat advanced specialties, for addressing the needs of prevention, diagnosis and treatment



Mental health

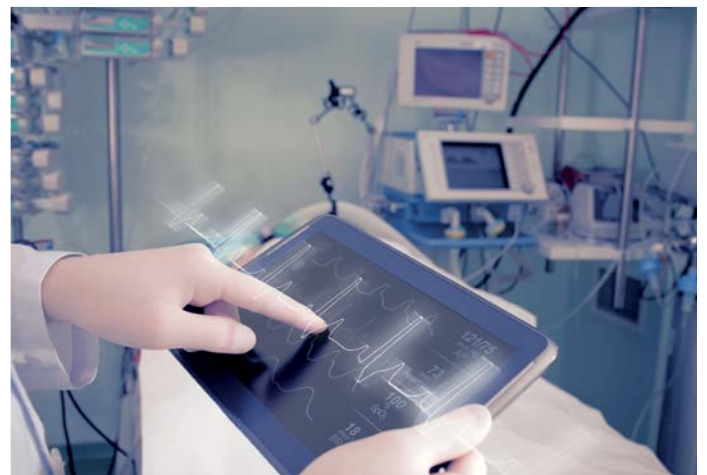
- Based on WHO's international classification of diseases, it is estimated that around 15% of the population suffer of any mental or substance use disorder
- The Dubai Clinical Services Capacity Plan has estimated a gap of 231 IP beds by 2025 for Psychiatry patients
- Mental health patients could be treated through different models, using remote monitoring, and telehealth for mostly follow ups, and low complexity OP cases, to specialized mental facilities for those considered as more severe or requiring long-term attention



“We are focused on engaging, supporting and facilitating sustainable priority investments in health sector gaps by the private sector, with the aim of providing the best health services in the Emirate of Dubai, and to continue to develop Dubai as a hub for medical tourism and innovation in healthcare.”

Dr. Ibtesam AlBastaki

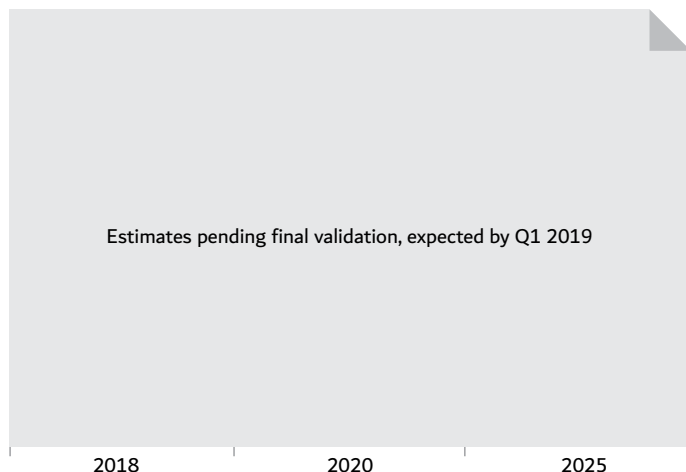
Director, Investment and PPP's Department, DHA



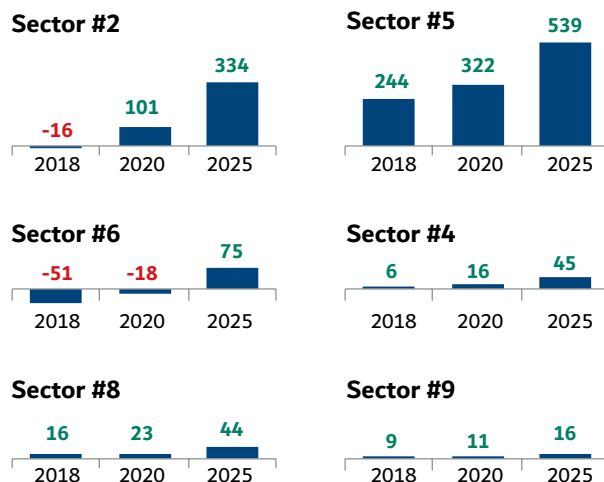
Highlights of investment priorities and opportunities (base case)

1 Outpatient Visit Rooms¹

Supply and demand in number of outpatient visit rooms, per specialty

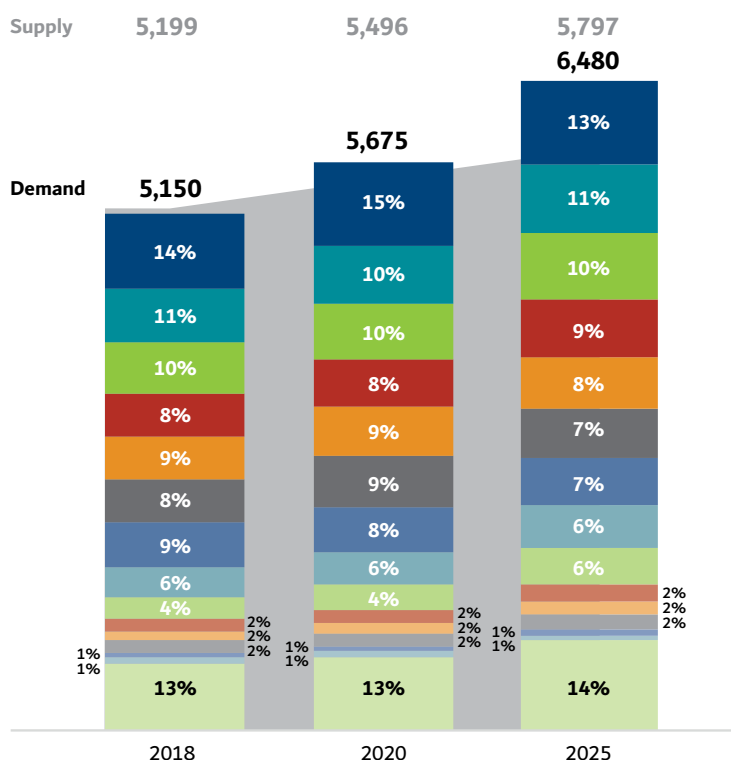


Gaps per sector, in number of outpatient visit rooms

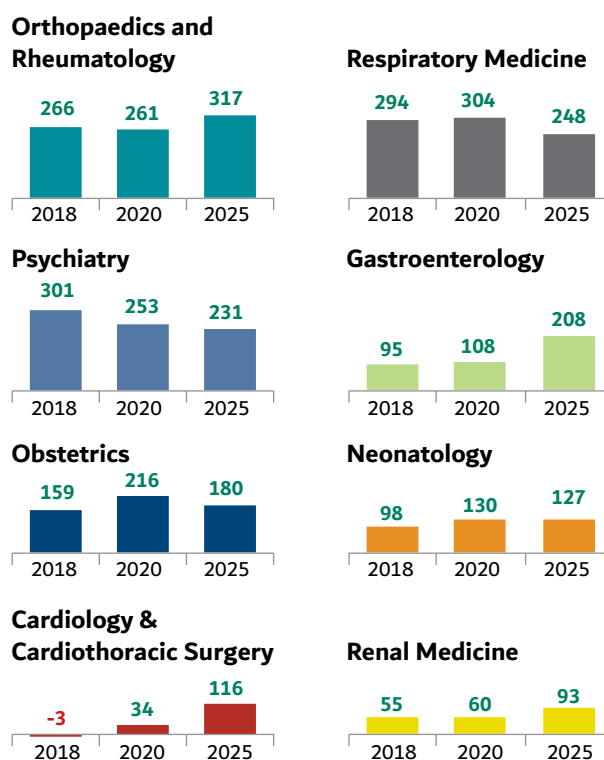


2 Acute Inpatient Beds¹

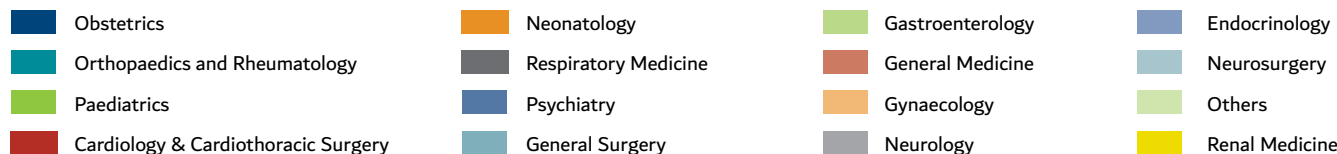
Supply² and demand in number of acute inpatient beds, per specialty



Gaps² per specialty, in number of acute inpatient beds



Legend



1. Preliminary results from Dubai Clinical Services Capacity Plan 2018-2030, developed by TAHPI

2. Planned bed supply (445 beds in 2018, 742 beds in 2020 and 1,043 beds in 2025) has been allocated based on probabilistic assumptions on demand and supply to the various specialties

Highlights of investment priorities and opportunities (base case)

2 Base case: Estimated gaps for Acute Inpatient Beds (2018-2025)¹

Specialty	Estimated Gaps (in no. of beds)			Specialty	Estimated Gaps (in no. of beds)		
	2018	2020	2025		2018	2020	2025
Orthopaedics and Rheumatology	266	261	317	Respiratory Medicine	294	304	248
Psychiatry	301	253	231	Gastroenterology	95	108	208
Obstetrics	159	216	180	Neonatology	98	130	127
Cardiology & Cardiothoracic Surgery	3	34	116	Renal Medicine	55	60	93
Urology	35	41	69	Immunology & Infections	38	36	38
Plastic Surgery	17	22	37	ENT, Head & Neck	41	38	34
Oncology	17	19	31	Paediatrics Medicine & Surgery	109	67	29
Neurology	6	0	11	Transplantation	9	8	10
Vascular Surgery	16	10	4	Dentistry	5	4	3
Dermatology	2	2	1	Haematology	3	2	1
Ophthalmology	17	16	16	Chemotherapy	31	31	31
General Surgery	155	121	32	Burns	73	72	70
Dialysis	85	85	84	Neurosurgery	92	89	85
Endocrinology	111	106	99	Gynaecology	216	206	165
General Medicine	560	547	520				

Projections are based on the following assumptions:

1. 70% planning occupancy per acute bed
2. Trauma is split into supply by surgical specialty proportions
3. Adjustments for National and Non-national utilisation based on current trends
4. Adjustments of the Average Length of Stay based on current utilisation rates
5. Planned bed supply (445 beds in 2018, 742 beds in 2020 and 1,043 beds in 2025) has been allocated based on probabilistic assumptions on demand and supply to the various specialties

USEFUL INFORMATION:

Dubai Clinical Services Capacity Plan 2018-2030: Undergoing final validation, to be released soon

KEY POINTS OF CONTACT:

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Ahmed Faiyaz Sait, Advisor, Investments and PPPs | +971 4 219 7695 | afsait@dha.gov.ae

1. Preliminary results from Dubai Clinical Services Capacity Plan 2018-2030, developed by TAHPI

DHA Investments & PPP's Department

The Investments & PPP's Department at Dubai Health Authority aims to **promote Dubai as a viable and competitive hub for investment in healthcare**, to provide the **best service for investors**, and to **enable sustainable public-private models in Dubai**. Its role is therefore to support DHA's objective of providing healthcare in line with global best practices, fostering innovation in all health-related sectors and of becoming a medical hub for the region by attracting investors and encouraging these to contribute to the development of targeted areas.

Published in 2018, DHA's Investment Strategy 2017-2020 focused on the following initiatives:



“We encourage the Private Sector healthcare providers and investors to invest in the identified focus areas for healthcare investment and in priority services where we see capacity gaps in the future. Through our initiatives and our continued engagement with the Private Sector, we will foster the growth and development of specialised and super-specialised health services led and managed by the Private Sector.”

Dr. Ibtesam AlBastaki

Director, Investment and PPP's Department, DHA

To ensure its success, the Investment and PPP's department focuses on three key components

Communicate



- Priorities and capacity gaps in Dubai's healthcare sector to local and foreign investors
- Investment opportunities by connecting and supporting DHA's internal and external stakeholders

Promote



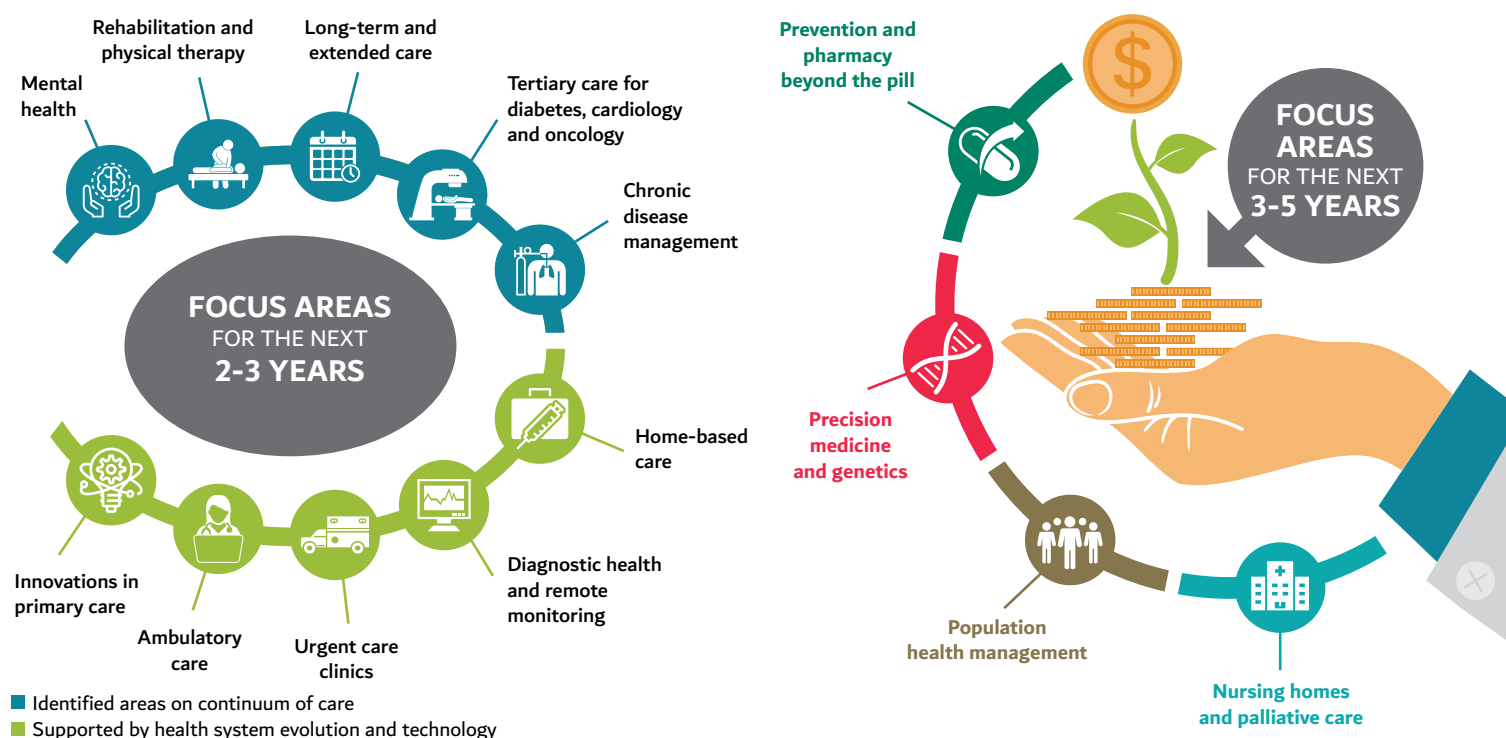
- Investment in priority areas where capacity gaps are identified as per Dubai clinical services capacity plan
- Private sector participation through workshops and briefing events

Engage

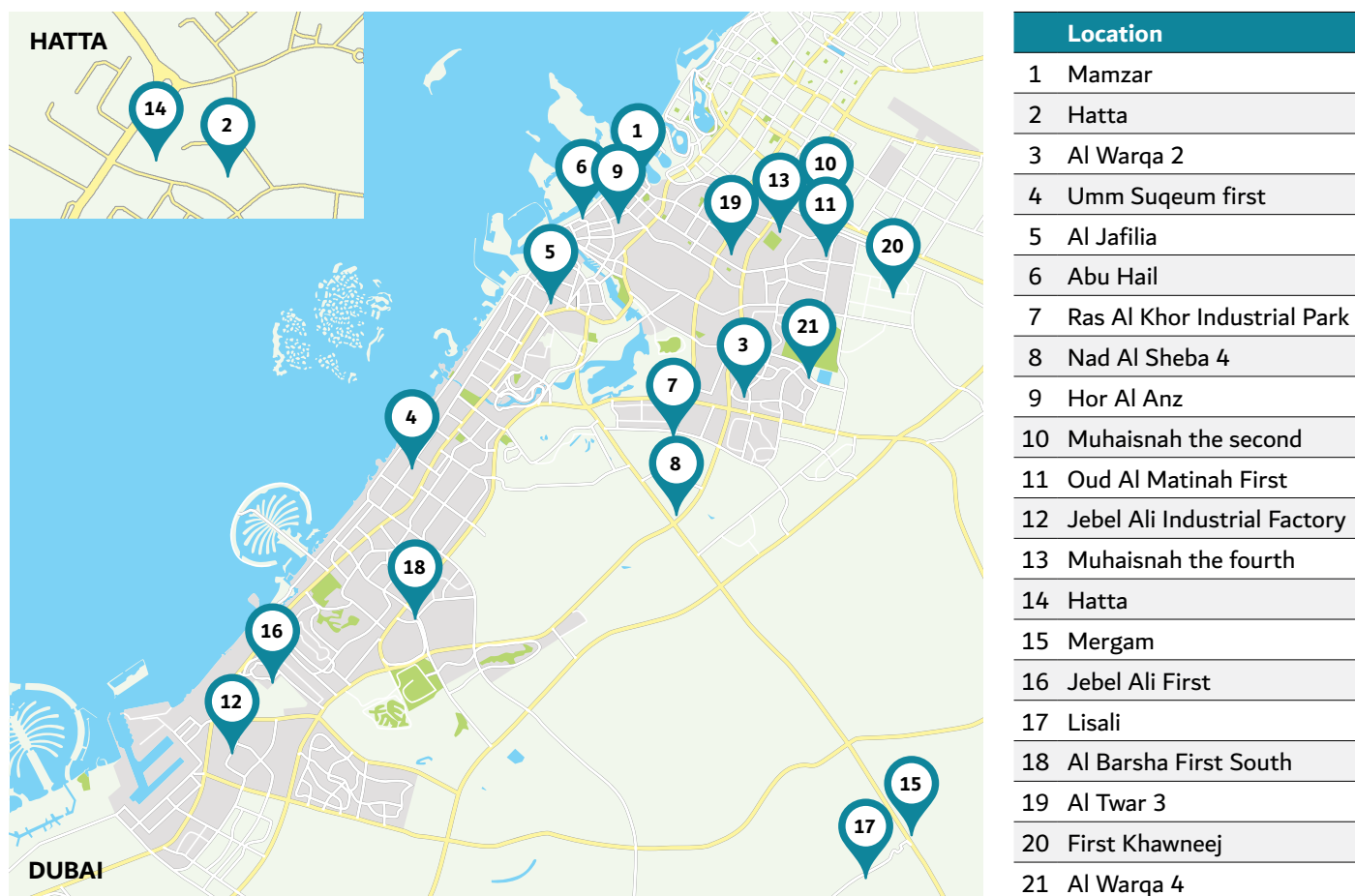


- Government stakeholders and investors through co-operation and partnerships (PPPs)
- Health investors and private sector providers on new investments and PPPs

The focus areas to support the development of Dubai's health ecosystem are identified in the short to mid-term



The Dubai Health Authority has available land for leasing to support investments in priority capacity gaps in Dubai's healthcare sector¹



1. For further information related to capacity gaps, investors are invited to contact the Investment and PPP's Department

The Investment and PPP's Department offers additional services to support DHA's strategy

From an investor perspective, the Investment and PPP's Department is a privileged Source of information and a facilitator of access to Dubai's healthcare sector. Some of its key responsibilities are to:



Other services provided by the Investments and PPP's Department include supporting investors in accessing relevant health statistics and reports from DHA and other stakeholders and maintaining an overview of the capacity gaps in Dubai's healthcare sector.



“Dubai has a PPP Law and guidelines to support private sector investment in strategic projects, that help reduce upfront capital investment, avoid project delays, enable allocation of risks between the public and private sector, and reduce operating costs across the life cycle of these assets, given the more efficient management of operations and maintenance of the facility. This is also beneficial to patients, as it gives them access to high quality clinical services, as we introduce in innovations in clinical services as well as in the design and sustainability of these assets based on best in class international practices.”



Dr. Ibtesam AlBastaki

Director, Investment and PPP's Department, DHA

DUBAI HEALTH SERVICES NAVIGATOR

A new initiative to support Investors in accessing health planning data in real time, while also providing patient community with information on available health services.

The **Health Services Navigator** is an initiative of the Dubai Health Authority aiming to provide a dynamic view of Dubai's healthcare sector. It allows to search for health facilities and to visualise health facility data using collected through DHA dedicated tools. This navigator is accessible on desktops, phones and tablets by December 2018.

The Health Services Navigator allows to:



Help **patients, tourists** and members of the community to **find health facilities**, and to get **access to details about their services**.



Public functionality allowing users to **visualise health facilities** in Dubai through the advanced search features:

- Type of facility
- Name
- Location
- Clinical Services
- Types of insurance accepted
- Operating hours
- Contact details



Helps investors to get access to **health planning data**¹, including **demand, supply** and **gaps** for health services across Dubai's communities



Secured functionality allowing health care investors (facilitated through DHA Investments & PPP's department) to:

- Browse **population data** by year
- **Visualise supply, demand, and gap** by community, planning unit (clinic, acute IP bed, ICU, etc.) and by year
- Apply filters and **select specific health services** to visualize changes in demand and supply
- Load **statistical datasets** and print **health service reports**
- **Zoom by Sector**, including population, supply, demand and gaps
- See **current** and **planned health facilities**

USEFUL INFORMATION

DHA Statistics: See [Open data](#)

Dubai Health Services Navigator: Undergoing final validation, to be released soon

KEY POINTS OF CONTACT

Dr. Ibtesam AlBastaki, Director, Investments and PPPs | +971 4 219 7644 | IIALBastaki@dha.gov.ae

Ahmed Faiyaz Sait, Advisor, Investments and PPPs | +971 4 219 7695 | afsait@dha.gov.ae

1. The access to this information would be through authorized DHA team members. Please contact the Investment & PPP's department.

Overview of Health Regulations

The Health Regulation Sector at DHA is responsible and accountable for **regulating all health facilities and healthcare professionals in the Emirate of Dubai** with the exception of those that fall under the jurisdiction of the Ministry of Health and Prevention (MOHAP) and Dubai Healthcare City Authority – Regulatory (DHCR). The Health Regulation Sector **takes a proactive, friendly and flexible approach toward regulation in order to drive high quality and safety in healthcare.**

In 2018, the Health Regulation Sector issued a new set of Health Facility Guidelines that streamline the design requirements and licensing process for all health facilities. These Guidelines set out the minimum requirements for the design and construction of various types of health facilities and will:

- ✔ Establish the minimum acceptable standards for health facility design and construction
- ✔ Maintain public confidence in the standard of health facilities
- ✔ Determine the basis for the approval and licensing of health facilities
- ✔ Provide general guidance to designers seeking information on the special needs of typical health facilities
- ✔ Promote the design of health facilities with due regard for safety, privacy and dignity of patients, staff and visitors
- ✔ Eliminate design features that result in unacceptable practices
- ✔ Eliminate duplication and confusion between various standards and guidelines



As per the new DHA structure, the Health Regulation Sector consists of the following departments:



Health Information and Smart Health



Health Tourism



Health Policies and Standards

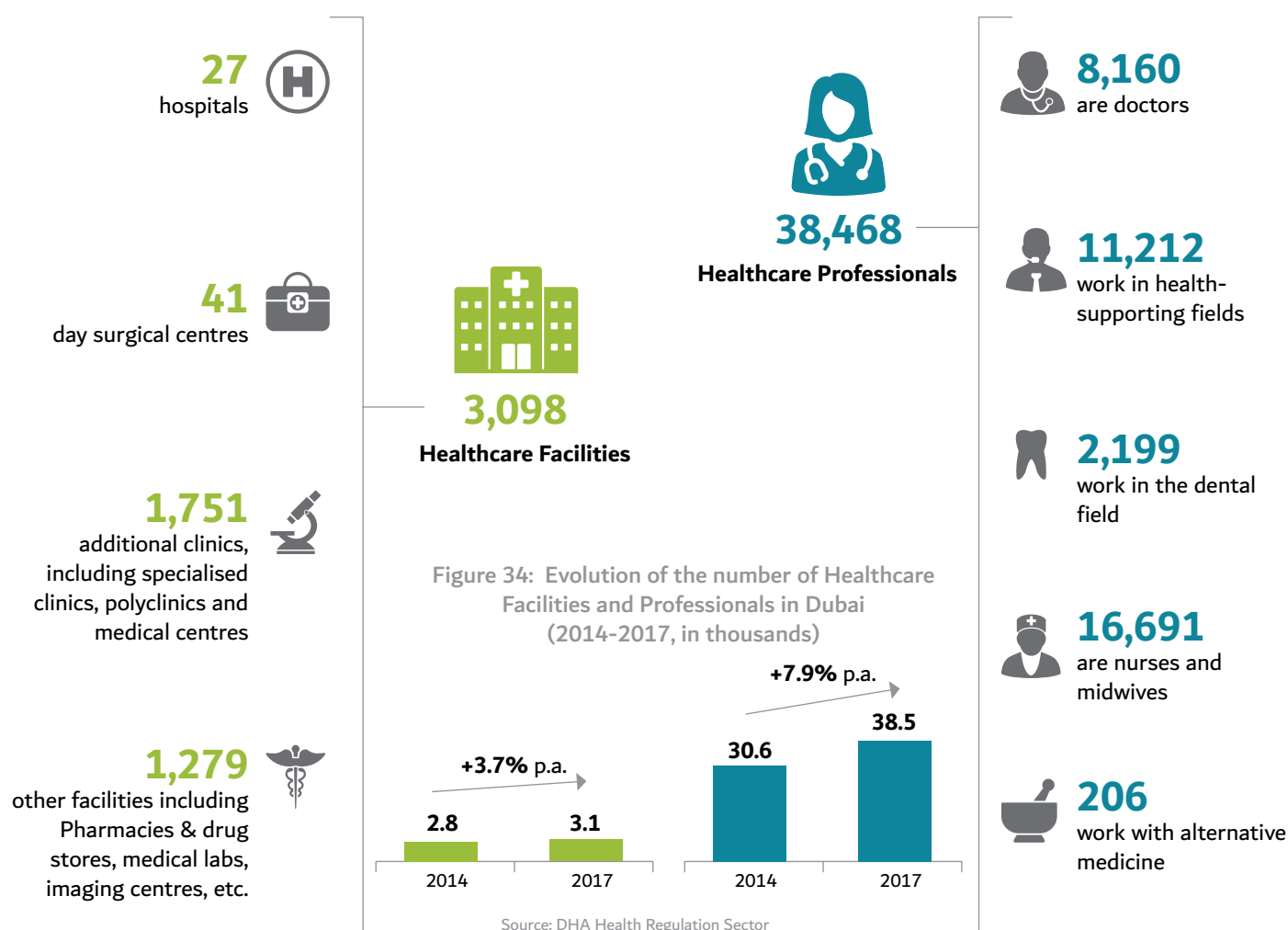


Health Licensing



Clinical Audit and Control

Licensed healthcare facilities and professionals¹



KEY POINTS OF CONTACT:

Health Regulation Sector

Business Village, Building B, 3rd floor, Dubai

800 342 (800 DHA) | regulation@dha.gov.ae

1. Regulated by Dubai Health Authority, as of April 2018

Snapshot of upcoming projects related to healthcare facilities licensing and regulation

HEALTH FACILITY GUIDELINES PROJECT

This project aims to update the 2012 version of the Health Facility Guidelines with more comprehensive, patient focused, research based, modern and efficient planning principles for public and private facilities. These guidelines will cover topics such as administrative provisions, design, access / mobility and safety, etc.

The DHA Health Facility Guidelines' overarching objective is:

"... to guide the development of health facilities that are planned, designed and operated in line with international healthcare best practice and Dubai Healthcare policy, in a safe and appropriate environment, at a reasonable cost."

See [Dubai Health Facility Guidelines - Health Regulations Sector](#)



SHERYAN PROJECT

In October 2017, Dubai Health Authority launched a new transformation initiative to redesign Sheryan, the Health Regulation Sector's licensing and inspection system.

The new Sheryan program is another initiative that further advances Dubai Health Authority's digital reinvention journey to provide citizen-centric experiences in the healthcare sector that are infused with innovation and powered by emerging technologies. Designed for Dubai healthcare professionals, facilities, and DHA employees at the center, the new Sheryan ecosystem will:

- Improve the customer and employee experience
- Increase operational performance
- Drive stronger regulatory compliance
- Be powered by new digital channel capabilities and real-time decisioning, automated workflows, Cognitive, Blockchain, and IoT technologies



DUBAI HEALTHCARE PERFORMANCE PROJECT (QEYAS)

The Dubai Health Authority seeks to develop and automate a Key Performance Indicator (KPI) framework for health facilities in the Emirate of Dubai to enable DHA to successfully produce and manage health performance measures covering the following main pillars:

1. Patient Safety indicators
2. Clinical Quality indicators
3. Patient Happiness indicators (patient experience, including waiting time)
4. Financial indicators
5. Operational indicators



Private hospitals, Day Care Surgery Centers, Selected Polyclinics, DHCC, IVF and MOH facilities in Dubai will be engaged and data requested, following a data readiness assessment.

Thanks to the KPI framework, the DHA will be able to:

- Implement quality improvement across its healthcare system;
- Provide consumers of healthcare services in the UAE and Dubai, specifically, with information to help them make better choices about healthcare providers;
- Provide medical tourists with trustworthy, independently validated information about Dubai's healthcare quality and,
- Develop a long-term reimbursement strategy that is driven by evidence on the quality of care provided.



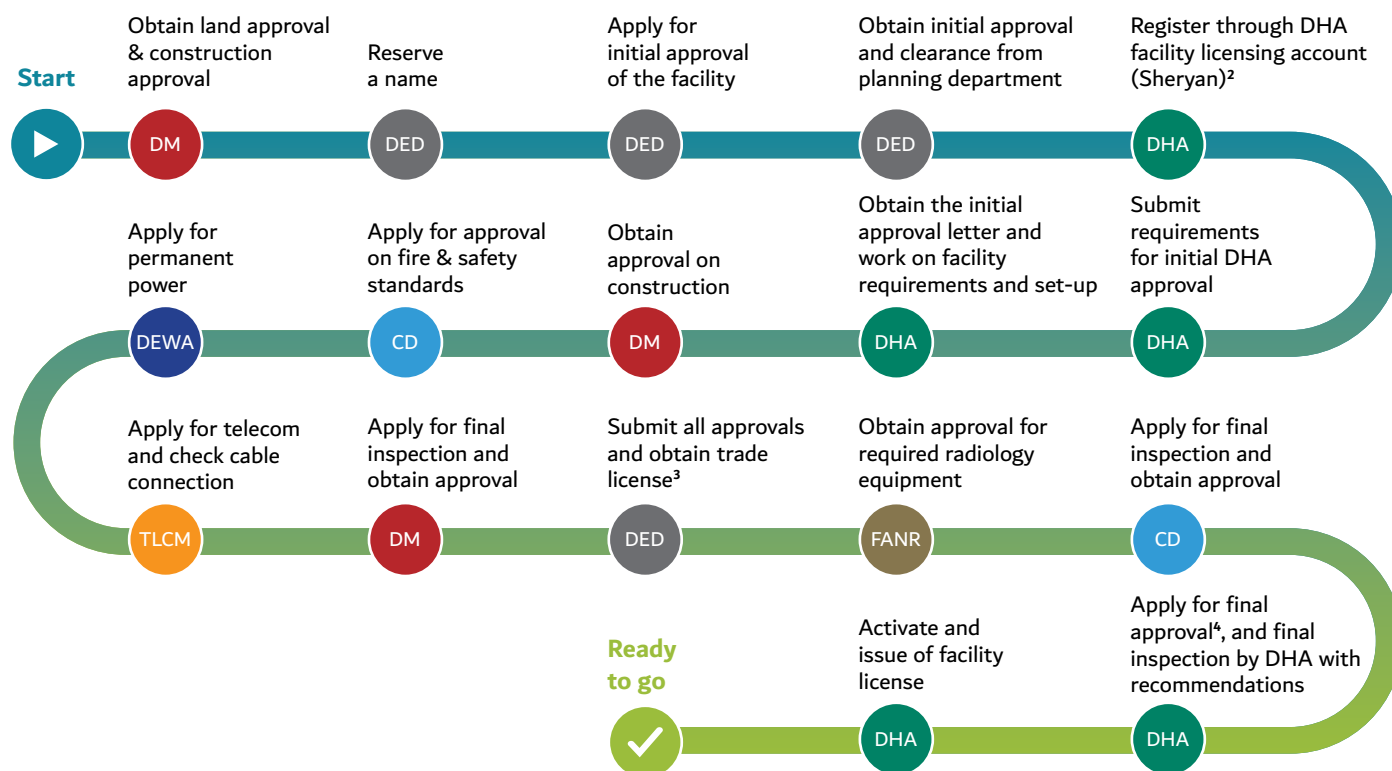
USEFUL INFORMATION

See more details on the Health Regulation Sector website:
See [website](#)

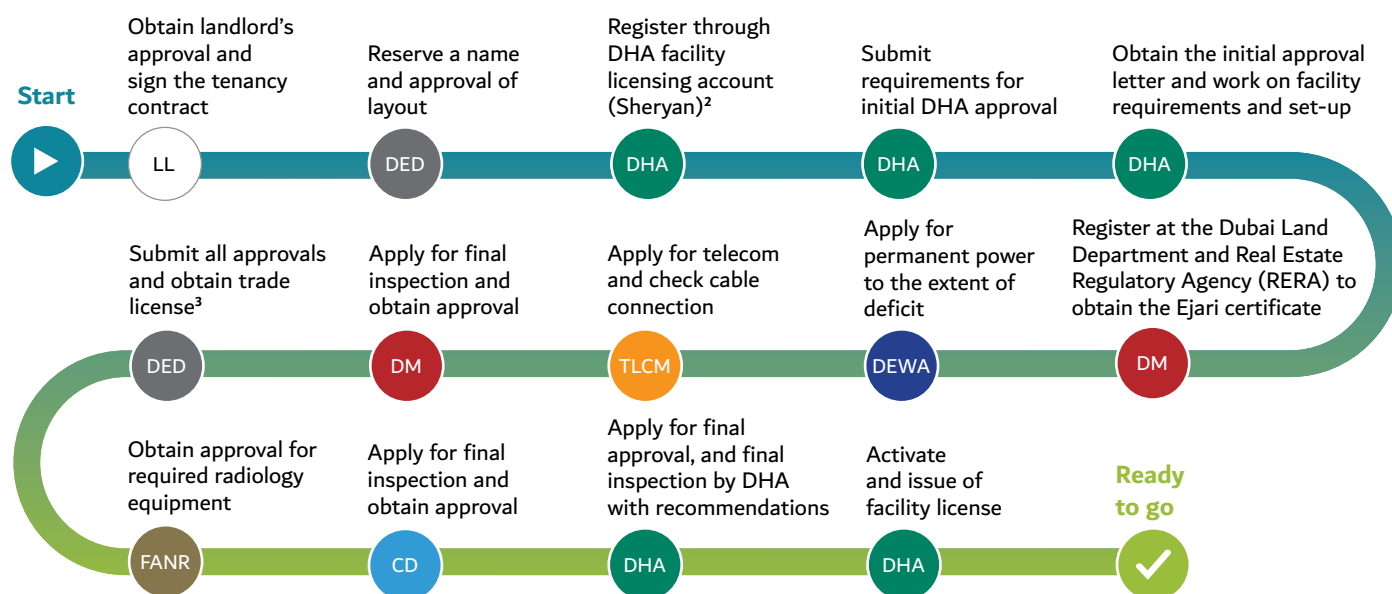
Setting up Health Facilities in Dubai

Setting up a health facility in Dubai is now an easy and smooth process, optimised by digital procedures. Investors wishing to open a health facility in the Emirate of Dubai and/or one of its free zones (excluding DHCC) will follow a different journey, based on the nature of their project (new constructions vs. refurbishments/ expansions). The mappings highlighted below provide a general approach and do not take into account specificities that might require additional approvals (e.g. building close to a metro station will require additional approval from RTA).

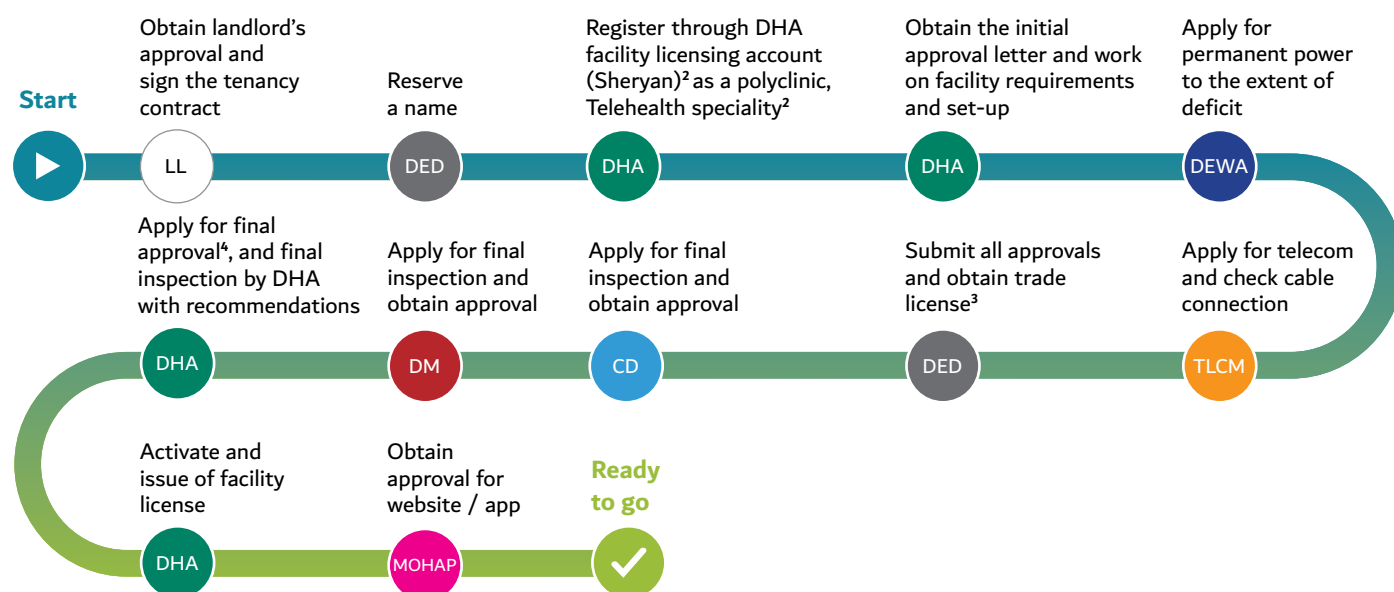
Licensing process map for Health Facilities¹: New construction



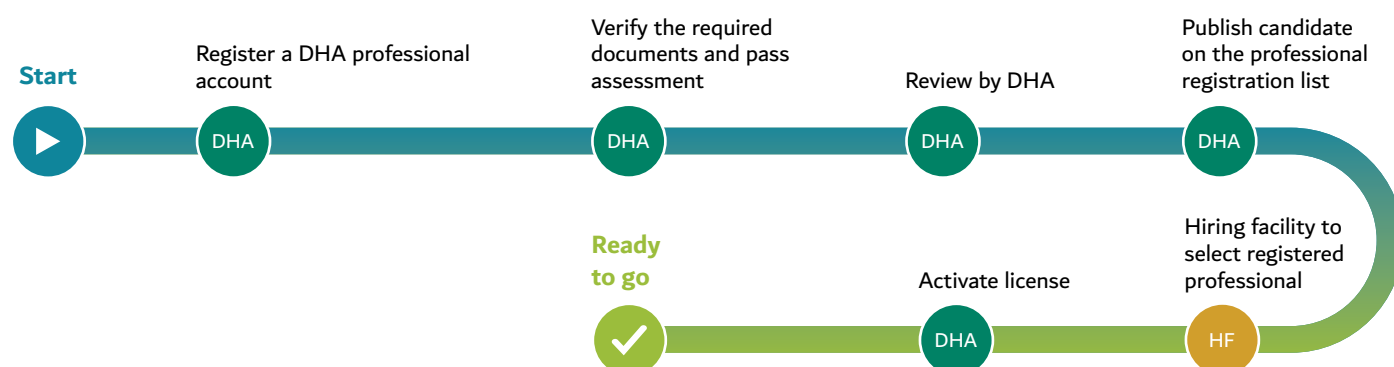
Licensing process map for Hospitals and Clinics: Refurbishment⁵ / Expansion



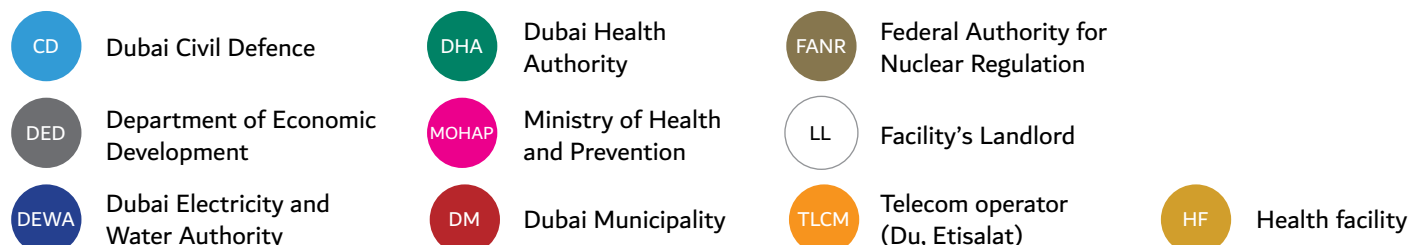
Licensing process map for Telehealth Services¹ - Standalone/ New Facility



Licensing process map for Physicians and Healthcare Professionals⁶ - New Applicant



STAKEHOLDERS



1. Within Dubai or a free zone (excluding DHCC). See DHA services for Health facilities at [Licensing Health Facilities](#). See DHA specific regulations per type of facility (incl. design requirements, patient care, diagnostic services, etc.) at [Licensing services](#)

2. See DHA [e-services](#) at e-services. See DHA requirements for new facilities at [New Facility License](#)

3. If the Hospital/polyclinic is close to critical infrastructure (e.g. metro station, airport) additional approvals might be necessary (e.g. RTA or Dubai Civil Aviation Authority)

4. Upload Trade license from Dubai Economic Department (DED) or Free zone. Update NOC by the medical director signed by all partners or authorized person with supporting documents

5. If any structural change takes place during the set-up, additional approvals might be necessary

6. See DHA services for Healthcare professionals at [Professional Licensing Procedures](#). See DHA requirements for new healthcare professionals at [Professional Qualification Requirements](#)

Health Insurance in Dubai

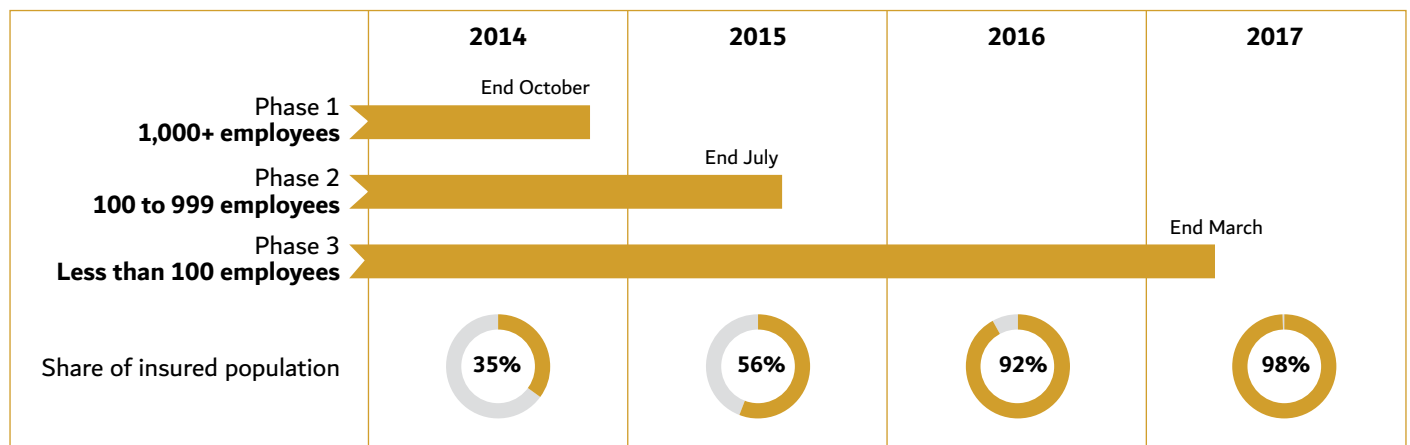
Dubai Government implemented a mandatory insurance framework in the Emirate (including in its free zones) through its Health Insurance Law No. 11, published in 2013. Based on this law, **all UAE Nationals and residents of Dubai** (including dependents) **must have insurance in place to cover emergency and curative healthcare needs**.

Mandatory insurance is one of the pillars of the Insurance System for Advancing Healthcare in Dubai (ISAHD) which aims to create an integrated and innovative insurance system for all Dubai citizens and residents, and to provide sustainable high-quality healthcare in Dubai for nationals, residents and visitors in order to position Dubai as **the best healthcare system globally**.

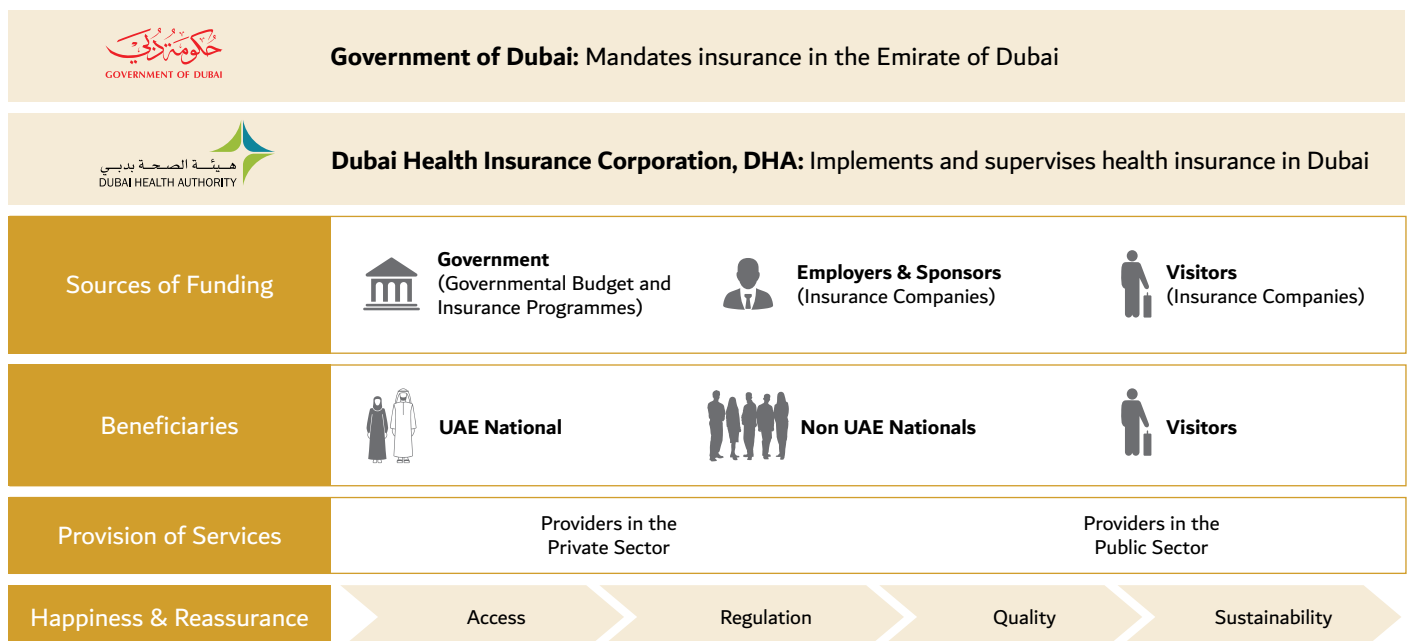
ISAHD's three main pillars are:

Provide insurance coverage for everyone in Dubai	Maintain economic sustainability	Enhance the quality of health services across the insurance system
--	----------------------------------	--

The roll out of mandatory insurance was accomplished in stages. For nationals, the SAADA programme began at the end of Q2 2015. For companies, residents and their dependents, three phases were planned in which a company's number of employees determined by what date workforce coverage should be in place. As a result, the share of the health-insured population rose from 35% to 98% by the end of 2017.



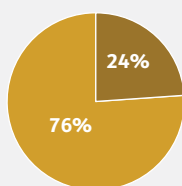
The structure of Dubai's health insurance system is now driven by the private sector (through Essential Benefits Package¹ and other private packages)



1. The Essential Benefit Package is exclusive to Dubai residents who are earning less than AED 4,000 per month.

Health insurance in Dubai: Demographics (2017)

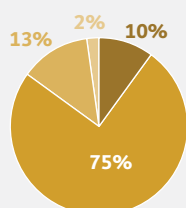
Gender



2.4 million insured population

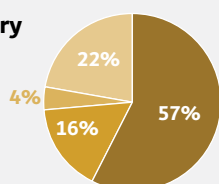
■ Female
■ Male

Age group



■ Below 18 y.o.
■ 18 to 45 y.o.
■ 46 to 60 y.o.
■ Over 60 y.o.

Income Category



■ Less than AED 4,000 per month
■ AED 4,000-12,000
■ Over AED 12,000
■ Family members

Health insurance in Dubai: Key metrics



Number of **health services** (2016):

63.8M



Number of **diagnoses** (2016):

52.1M



Total **health expenditures** in 2017:

AED 17.5 billion



Total **health expenditures** covered by **private insurance** (2017):

approximately 60%

USEFUL INFORMATION www.isahd.ae | ISAHD@dha.gov.ae



SAADA: a health insurance programme for UAE Nationals living in Dubai

SAADA is a health insurance programme under the supervision of the Dubai Health Insurance Corporation for UAE Nationals from the Emirate of Dubai.

This programme aims to provide insurance coverage to citizens who do not currently benefit from any government health programme in the Emirate of Dubai, through multiple players in the private sector as well as through the health services delivered by the DHA network.

The programme implemented by SAADA has become a benchmark, setting the standard for health insurance programmes in the region.

KEY STATISTICS (2017)



Newborns: A monthly average of 40 are benefiting from SAADA's programme



Medical Cases: Over 8 cases are handled in hospitals on a daily basis



Surgeries: Over 10 surgeries per day



Inpatients: An average of 20 inpatient cases per day



Outpatients: Around 1,050 outpatients are benefiting from SAADA's programme per day



Insured members: A daily average of 210 new members are onboarded into the programme

USEFUL INFORMATION www.saada.ae

eClaimLink: a tool aiming to unify and centralise patients' health data

eClaimLink is the eClaim initiative of Dubai Health Insurance Corporation that has established and implemented a unified healthcare language and communication scheme across the Emirate and which provides a centralised health data tracking system.

eClaimLink facilitates the exchange of financial and clinical information between payers, providers, patients and authorities, and provides DHA with the information needed to organise, strategise and optimise the healthcare ecosystem in Dubai.

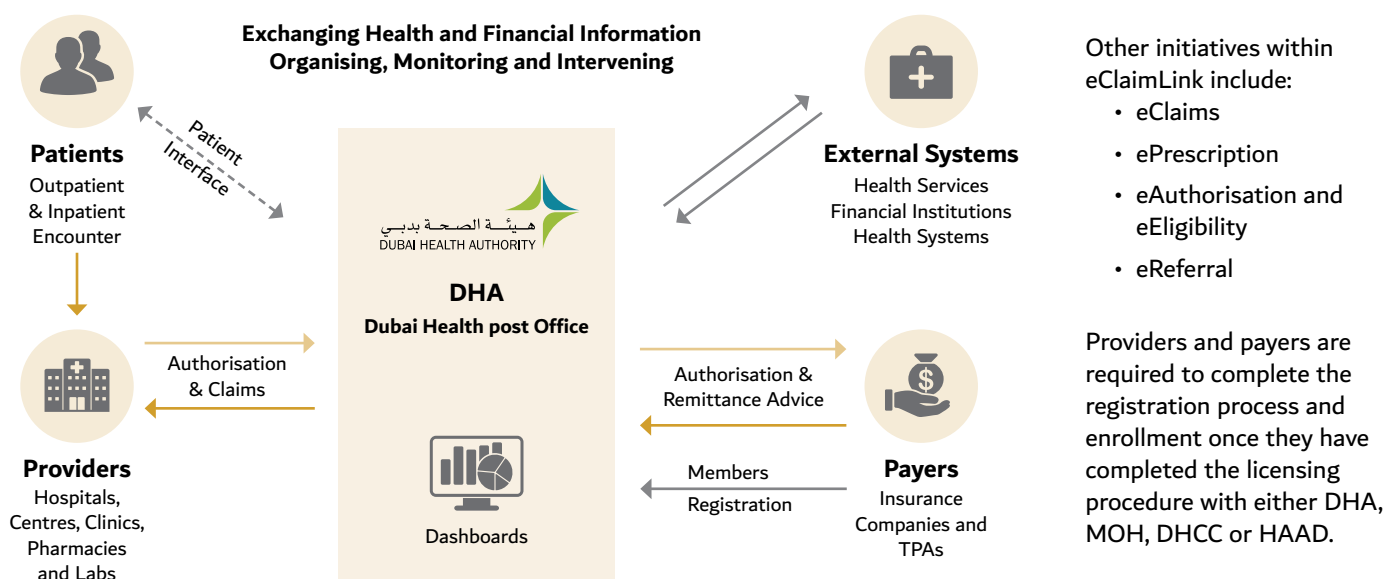
Impacts of the eClaimLink programme

Decreasing

- Prescribing mistakes
- Dispensing mistakes
- Fraud
- Waste
- Abuse
- Waiting time at pharmacy
- Pharmacy-physician calls
- Claims submission time

Increasing

- Patient safety
- Health outcome
- Information accuracy
- Effective communication
- System efficiency
- Control on reSources
- Transparency



USEFUL INFORMATION www.eClaimLink.ae | info@eclaimlink.ae, support@eclaimlink.ae

Snapshot of upcoming projects related to health insurance in Dubai

DRG: a new pricing system for healthcare services

Dubai Health Authority has adopted the International Refined Diagnosis Related Groups (**IR-DRGs**) for inpatient hospital payment, which **bundle inpatient hospital services** into a single group for each inpatient stay. The DRG **provide a flat per-discharge** payment that varies based on diagnoses, severity, and whether and what procedures were performed. DRGs are used for two purposes:

- As an alternate payment methodology
- As a measure for assessing hospitals' case mixes and activities

Several **types of services are included** in the DRG, such as:

- Physician care
- Therapies
- Pharmaceuticals
- Room
- Etc.
- Nursing care
- Radiology
- Laboratory
- Meals

The **DRG** payment system uses a **series of parameters for calculating the specific payments to be made to hospitals** for each inpatient stay:

- Base rate
- Outlier payment
- Relative weights
- Negotiation bands
- Transfer payment



USEFUL INFORMATION [IRL-DRG Guidelines](#)

Ejada: Dubai's health insurance performance monitoring system

Ejada is a **performance management system** enabling the monitoring of the **health insurance activities in Dubai**. Through a system of 'ejada' or quality indicators, all healthcare facilities (hospitals and clinics), physicians and insurance companies will be rated for the quality of their service based on information collected by DHA and reviews by patients, payers and providers.

Ejada indicators

Quality indicators and ratings for physicians, facilities and insurance companies based on information collected by DHA systems from providers, payers and patients

Improved results

Increased efficiency, improved clinical results and enhanced patient experience

People's choices

Individuals in Dubai could select their physicians and facilities by accessing information online/mobile based on quality indicators. Medical Tourism is enhanced by choices

USEFUL INFORMATION [Ejada Implementation](#)

Dubai Standards in Healthcare: an education programme on best practices guidelines

The "Dubai Standards in Healthcare" is a series of educational programmes designed **to provide healthcare practitioners** in Dubai with **best practice guidelines and standards** for services provided **through health insurance**:

- The programme consists of Continuous Medical Education (CME) accredited educational events, designed to bring the latest updates on screening, diagnosis and prevention of various chronic conditions, guidelines and criteria for referral
- The programme establishes a task force team with representatives from DHA, Emirates Medical Association and Dubai private sector to develop medical standards and audit tools based on international and national guidelines

KEY POINTS OF CONTACT:

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Dubai City

Dubai FDI, a Partner for Foreign Investors in Healthcare

VISION

“To position Dubai on a global stage as a business opportunity for new initiatives and an essential base for successful business.”

MISSION

“To support, stimulate and sustain foreign investment in Dubai and ensure all ventures are consistently managed with commitment and dedication.”

From planning to implementation and beyond, Dubai FDI offers a path to commercial success:



Dubai FDI has the expertise, reSources and knowledge to ensure that investors and businesses have a smooth journey to success



Dubai FDI, part of the Department of Economic Development in Dubai, provides essential information and invaluable support to foreign businesses looking to invest in Dubai's thriving economy and take advantage of its global strategic importance



Dubai FDI guides, advises and provides practical help on all aspects of business decisions and management, from determining the best legal structures to identifying investment opportunities and introducing a vast network of government and private sector contacts

Dubai is one of the top global city destinations for FDI capital...

In 2017, Dubai continued to lead the region and sustain its top ranking amongst leading global cities in foreign direct investment (FDI) performance:

367
projects

4th
Global ranking

Top Source countries: United States, United Kingdom, France, India, Germany

USD
27.3
billion

10th
Global ranking

Top Source countries: United States, Austria, France, United Kingdom, Saudi Arabia

Source: Financial Times - fDi Markets

... and a very attractive one for investors in healthcare

Over the 2015-2017 period, Dubai FDI registered **22 healthcare projects**, accounting for more than **USD 105 million of CAPEX**. The diversity of the projects, from speciality hospitals and outpatient care centres to medical equipment and research & development, showcases the multiple development possibilities existing in Dubai.



USEFUL INFORMATION

Dubai FDI: www.dubaifdi.gov.ae

Dubai Advantage: www.thedubaiadvantage.com



@DubaiFDI

KEY POINTS OF CONTACT

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Walid Al Marhoon, Senior Manager of Investment Promotion | Walid.Marhoon@fdidubai.gov.ae

مؤسسة دبي
لتنمية الاستثمار
DUBAI FDI



Dubai Healthcare City

A thriving health and wellness ecosystem, the **Dubai Healthcare City (DHCC)** free zone, launched in 2002, has brought to life a true integrated community in which healthcare, medical education, medical research and wellness, along with hospitality, retail and residential amenities, benefit patients, medical travelers, students, investors and visitors.



VISION

“Dubai Healthcare City will become an internationally recognised location of choice for quality healthcare and an integrated centre of excellence for clinical and wellness services, medical education and research.”

MISSION

“To enable high quality integrated healthcare, education, research and wellness by forming strategic partnerships. This will deliver exceptional customer experiences, ultimately impacting every member of our society.”

The free zone is governed by Dubai Healthcare City Authority (DHCA), which was established in May 2011 by HH Sheikh Mohammed Bin Rashid Al Maktoum, Vice-President and Prime Minister of the UAE and Ruler of Dubai, to position the free zone as a preferred and prosperous global health and wellness destination.



Al Razi Medical Complex

“Since our founding in 2002, we, in the Dubai Healthcare City free zone, have been developing a robust ecosystem of healthcare, wellness, medical education and research in the region, contributing to key national priorities of innovation, knowledge and sustainability, and driving economic diversification efforts in the UAE.”

Dr. Ramadan AlBlooshi
CEO, Dubai Healthcare City
Authority – Regulatory



HH Sheikh Mohammed appointed HRH Princess Haya Bint Al Hussein as the Chairperson of DHCA and appointed a Board of Directors to drive excellence in quality healthcare, wellness, medical education and research. The free zone is regulated by the independent regulatory arm, Dubai Healthcare City Authority – Regulatory, whose quality standards are accredited by the International Society for Quality in Healthcare.

DHCC is home to clinical partners including **hospitals, outpatient medical centres** and **diagnostic laboratories** across **160 specialities** with licensed professionals, strengthening the free zone’s medical tourism portfolio. Non-clinical partners include retail and hospitality.

DHCC is now home to reputed regional and global names including Mediclinic City Hospital and its Comprehensive Cancer Centre; Dr Sulaiman Al Habib Hospital; and industry names including Johnson & Johnson and Cochlear Middle East have set up their regional headquarters in DHCC. In addition, DHCC will be home to the upcoming clinical development Clemenceau Medical Centre and wellness development, WorldCare Wellness Centre, part of MAG of Life Creek Resort. The free zone is also home to Al Jalila Children’s Speciality Hospital, the first dedicated children’s hospital in the UAE.



Mohammed Bin Rashid Academic Medical Centre

“In an era of health informatics, revolutionary tools like 3D printing and disruptive technologies like artificial intelligence, DHCC has remained dynamic and responsive to the needs of communities. From the patients who visit the best-in-class facilities to the medical students embarking on their careers as physicians and the scientists involved in research, DHCC, along with stakeholders, is building capacity to position Dubai as a preferred healthcare investment destination.”

Dr. Ramadan AlBlooshi

CEO, Dubai Healthcare City Authority – Regulatory

Top outpatient segments and treatments in demand in DHCC



Obstetrics and
gynaecology



Orthopaedics



Paediatric



Dental



Ophthalmology



Mental health



Ibn Sina Medical Complex

Dubai Healthcare City is spread across two phases

DHCC – Phase 1

- Thriving ecosystem dedicated to **healthcare and medical education**
- Over 4 million square feet in Oud Metha
- Home to international healthcare providers such as Mediclinic City Hospital and its Comprehensive Cancer Centre, Moorfields Eye Hospital and the only paediatric hospital in the UAE, Al Jalila Children's Specialty Hospital
- Global industry players such as Johnson & Johnson and Cochlear Middle East have set up their regional headquarters in DHCC



DHCC – Phase 2

- Spacious and inviting space for wellness activities with unique eco-friendly concepts
- Over 19 million square feet in Al Jaddaf Dubai
- Water-facing rehabilitation and wellness offerings to cater to all age groups
- Overlooking Ras Al Khor Wildlife Sanctuary and widest stretch of Dubai Water Canal as well as views of Burj Khalifa and future Dubai Creek Tower
- Phase 2 is conceptualised to encourage healthy living and will provide a true wellness experience for residents and visitors

REGULATORY SERVICES

Dubai Healthcare City Authority – Regulatory (DHCR), the regulator of DHCC, is **responsible for compliance and enforcement of clinical governance within the free zone**

DHCR is also responsible for the licensing of all healthcare professionals, educators and operators, as well as setting and maintaining international best practices in delivering healthcare in DHCC

Other regulatory services in DHCC are:

Masaar

It is the first-of-its-kind portal in the UAE that caters to more than 130 services for applications and renewals in commercial set-ups, healthcare professional and clinical licensing, as well as government services



How to access?

<https://www.dhcr.gov.ae/en/E-Services>

How to set-up?

- Select the premise for your operations
- Apply for provisional approvals through Masaar
- Submit the required documents for commercial licensing
- Once the commercial license is issued, apply for the operating permit

International Society for Quality in Healthcare (ISQua)

ISQua, a global leader in assessing the standards in healthcare safety and quality, and the only organisation to 'accredit the accreditors', awarded DHCR the 3rd Edition of the Dubai Outpatient Clinic Quality Standards

EDUCATION AND RESEARCH SERVICES

DHCC is enabling capabilities in education and research in Phase 1 and 2

Mohammed Bin Rashid University of Medicine and Health Sciences (MBRU)

MBRU, as of 2018, is home to 131 students and 59 alumni, collectively from the College of Medicine (COM) and the Hamdan Bin Mohammed College of Dental Medicine (HBMCDM)



Mohammed Bin Rashid Academic Medical Centre (MBR-AMC)

The MBR-AMC is DHCC's dedicated academic complex. It houses the MBRU, Al Maktoum Medical Library, a state-of-the-art facility providing digital and print information, and the Khalaf Ahmad Al Habtoor Medical Simulation Centre, the first comprehensive simulation training facility of its kind in the region

Al Jalila Foundation

Al Jalila Foundation Research Centre, set to open in Dubai Healthcare City, will be a beacon for regionally-relevant medical innovation in the field of biomedical research



In addition, the DHCC free zone is home to reputed regional and global names such as Harvard Medical School Centre for Global Health Delivery - Dubai, Royal College of Surgeons in Ireland - Dubai and Swiss International Scientific School in Dubai

DHCC has numerous advantages for investors in healthcare



A thriving healthcare medical education and research ecosystem:

Access to a network of 400+ partners



Strategic location and accessibility:

10-15 minute drive from Dubai International Airport and just over 30-minute drive from Al Maktoum International Airport



One-stop-shop approach:

DHCC provides a one-stop-shop solution for all related governmental services transactions. Further, Masaar serves as an e-portal for set-up and renewal services (+130 services)



The free zone offers

100% ownership for both expatriates and UAE Nationals

DHCC offers investors a range of set-up options...



Leasing clinical spaces

Comprehensive space for speciality clinics, day surgery centres, and medical & research laboratories



Leasing non-clinical spaces

State-of-the-art commercial offices suited to all business types



Business Centre

Fully-furnished offices and open space workstations



Freehold leasing solutions

Land plots (sale and lease) with infrastructural provisions

...through different partnership models



Build-to-suit

- Customised solutions catered to unique business needs
- Investors can allocate capital towards core business operations
- Revenue sharing



Joint Ventures

- Form partnerships
- Share benefits and risks

“We have witnessed tremendous growth in quality and healthcare services in Dubai Healthcare City. Being able to have all my business requirements managed in one location gives me the focus I need to improve patient care and expand our services. I am truly pleased with the positive environment in DHCC.”

Dr. Carol Lecart

Founder, Belgium Medical Services

USEFUL INFORMATION

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DHCR: www.dhcr.gov.ae | info@dhcr.gov.ae

Phone: 800-HEALTH (432584)



@healthcarecity



@dubaihealthcarecity



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DHCC2011



Dubai Healthcare City

OFFICE LOCATION

Dubai Healthcare City Authority

Dubai Healthcare City, Mohammed Bin Rashid Academic Medical Centre (building 14), Second Floor

Dubai Healthcare City and Dubai Healthcare City Authority – Regulatory

Ibn Sina Medical Complex (building 27), Block C, Ground and First Floors

Dubai Science Park

Founded in 2005, Dubai Science Park (DSP) is a vibrant, holistic, science-focused community, dedicated to supporting entrepreneurs, SMEs and MNEs. Since its inception, the community has grown to more than 350 companies, employing over 3,600 professionals in the sciences, energy and environmental sectors.

Designed specifically for the needs of businesses and professionals who work in sciences, DSP fosters an environment that supports scientific research, creativity and innovation. By providing ample office and laboratory space, robust infrastructure and a vibrant community for residents, DSP ensures a supportive eco-system for businesses and professionals to flourish.

Dubai Science Park aims to play a significant role by facilitating a more sustainable and self-sufficient future that maximises the use of indigenous reSources and talent. DSP will achieve this by supporting innovation in the sciences by fostering growth and change in the areas of human science, plant science, material science, environmental science and energy science.



VISION

“To be Dubai’s most innovative and vibrant community for all segments of the science sector and a place where corporates and residents can work, live and flourish.”

MISSION

“To play a significant role in Dubai’s Vision 2021 by facilitating a more sustainable and self-sufficient future that maximises the use of indigenous reSources and talent. This will be achieved by supporting innovation in the sciences, helping companies utilise cutting-edge technology and information to foster growth and change...”

DSP business activity is mainly oriented toward life sciences



Key partnerships contribute to a smooth set-up process at DSP

- UAE Ministry of Health
- The Executive Council
- Al Jalila Foundation
- Clean Energy Business Council
- Dubai FDI
- Mohammed Bin Rashid University of Medicine and Health Sciences



“Dubai Science Park has been the ideal location for us. The Park not only features state-of-the-art infrastructure that caters to the specific needs of the pharmaceuticals sector, but offers access to an extensive network of industry partners that are keen to transform Dubai into a pharmaceutical manufacturing hub in line with the Dubai Industrial Strategy 2030.”

Madhukar Tanna

Chief Executive Officer, Pharmax Pharmaceuticals

DSP has numerous advantages for investors in life sciences and healthcare related sectors



100% foreign ownership
and **repatriation of profits and capital**



Tax-free salaries for all
employees



Exemption from **customs duty** for goods and services



No trade barriers or quotas



Strong **regulatory framework**



Excellent **networking opportunities**



Presence of a large number
of **sub-sectors of the science industry**



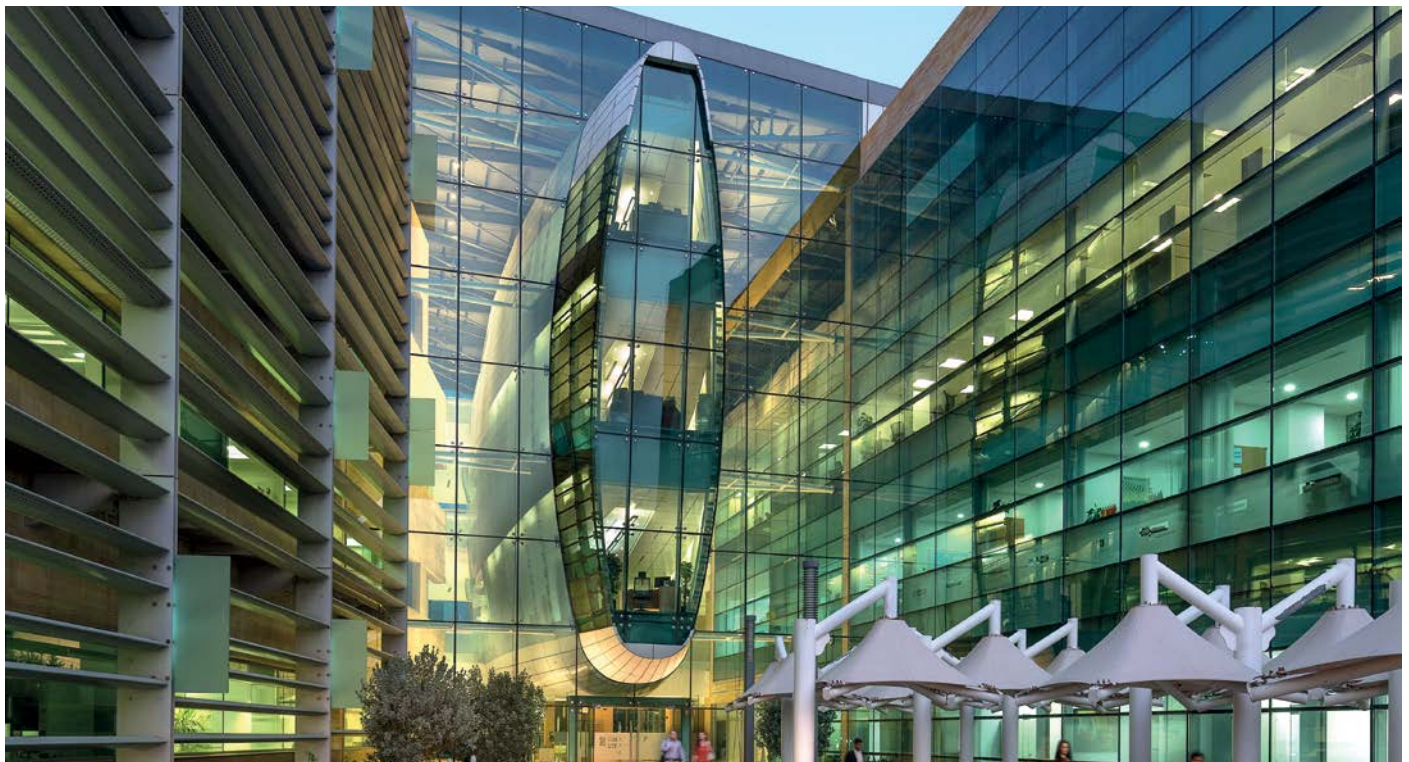
Worldwide recognition
of Dubai Science Park



“With Medtronic being the leader in medical technology globally, we looked for a business hub for our regional offices that allows us the opportunity to interact with different players in the industry working in healthcare but also in the technology sphere. Dubai Science Park has played the role of a specialised community that has supported Medtronic’s expansion and investment in the United Arab Emirates and in the region. DSP has also served as a major facilitator in allowing Medtronic to explore options on accessing the UAE markets directly and has supported with relevant market data accordingly. Our partnership with DSP has fostered collaboration with different healthcare authorities to allow us to reach our goal of transforming healthcare. The leadership team at DSP proactively reach out and are very interactive and collaborative.”

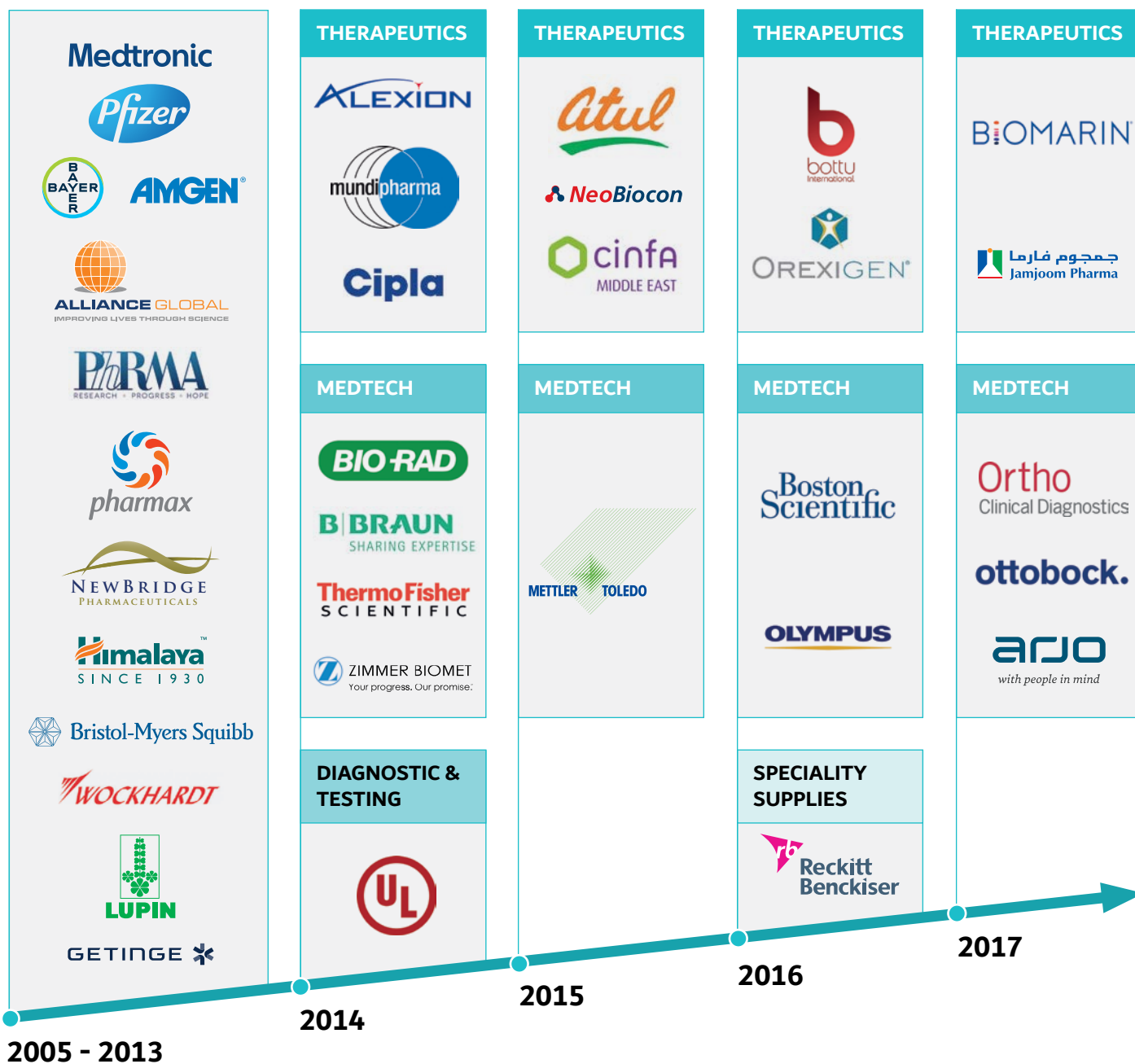
Majid Kaddoumi

Vice President for Middle East, Africa, Central Asia and Turkey & Central and Eastern Europe, Medtronic



Dubai Science Park laboratory complex

DSP is home to more than 350 companies, including Tier 1 players in the healthcare space



“Innovation and adequate investment in R&D are vital to the development of the local healthcare sector. As such, DSP is committed to transforming Dubai into a global healthcare hub by providing an ecosystem that nurtures innovation through the provision of state-of-the-art infrastructure, extensive networks and a favourable regulatory framework. We are equally committed to strengthening Dubai’s appeal as an investment destination for innovative healthcare companies that are on the lookout for a conducive environment that features an easy set-up model and facilitates business growth, whilst acting as a springboard for neighbouring markets.”

Marwan Abdulaziz Janahi

Managing Director, Dubai Science Park and Chairing Member, Pharmaceuticals and Medical Equipment Taskforce of the Dubai Industrial Strategy 2030



Dubai Science Park headquarter towers

DSP also offers investors flexibility in capital structure options

New companies or branches of existing enterprises (international or local) have a choice of legal frameworks they can adopt, all of which offer easy set-up:

- 1 Free Zone Branch of an international or UAE company (as a legally dependent part of its parent company)
- 2 Free Zone Limited Liability Company (LLC with corporate structure, with natural person shareholders, with both corporate and natural person shareholders), as well as possible variants

See more details on [setting up a business with Dubai Science Park](#)

USEFUL INFORMATION

www.dsp.ae | info@dsp.ae

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KEY POINTS OF CONTACT

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Health Tourism in Dubai

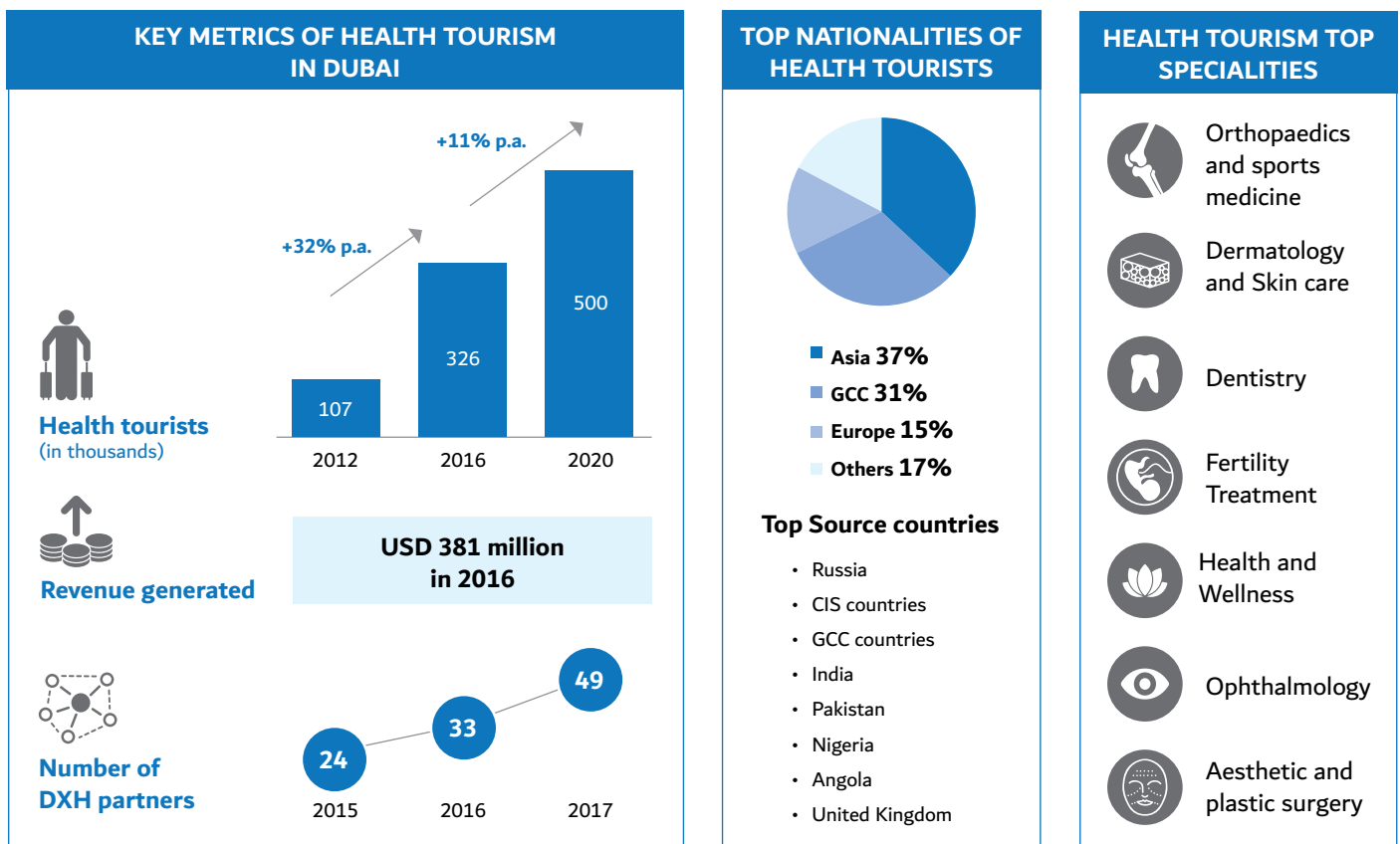
Dubai Health Experience (DXH) was launched by HH Sheikh Hamdan bin Mohammed bin Rashid Al Maktoum, Crown Prince of Dubai and Chairman of the Executive Council, as a continuation of 'Dubai, a Global Destination for Medical Tourism.

The Health Tourism Department in DHA supports Dubai as a global health tourism destination and a gateway to the finest medical experts and premier accredited healthcare facilities. As part of its strategic plan, DXH is focused on building strong ties with Dubai's finest healthcare providers to create an unparalleled experience for medical and health tourists. DXH today embraces more than 50 of Dubai's leading healthcare providers from hospitals and specialist clinics, to day-surgery centres. All the participating group members go through an evaluation process which involves each facility meeting rigorous requirements and standards, on-site inspections and ongoing reviews by DHA's Health Regulation Department to ensure quality, safety and service standards for Dubai's inbound medical and health tourists.

Today, Dubai is able to appeal to a wider audience who may be on the lookout for more wellbeing-related treatments in line with international benchmarks. DXH offers a range of medical spas, integrated health and treatment centres including various alternative treatments like homeopathy, ayurveda etc. It also includes packages with complete health check-ups along with a holistic written lifestyle plan, consultation with a functional medicine consultant, nutritionist and stress management consultant.

DXH.ae provides a convenient one-stop platform for patients medical and travel needs, in order to make the in-bound process as smooth as possible.

Snapshot of Health Tourism in Dubai



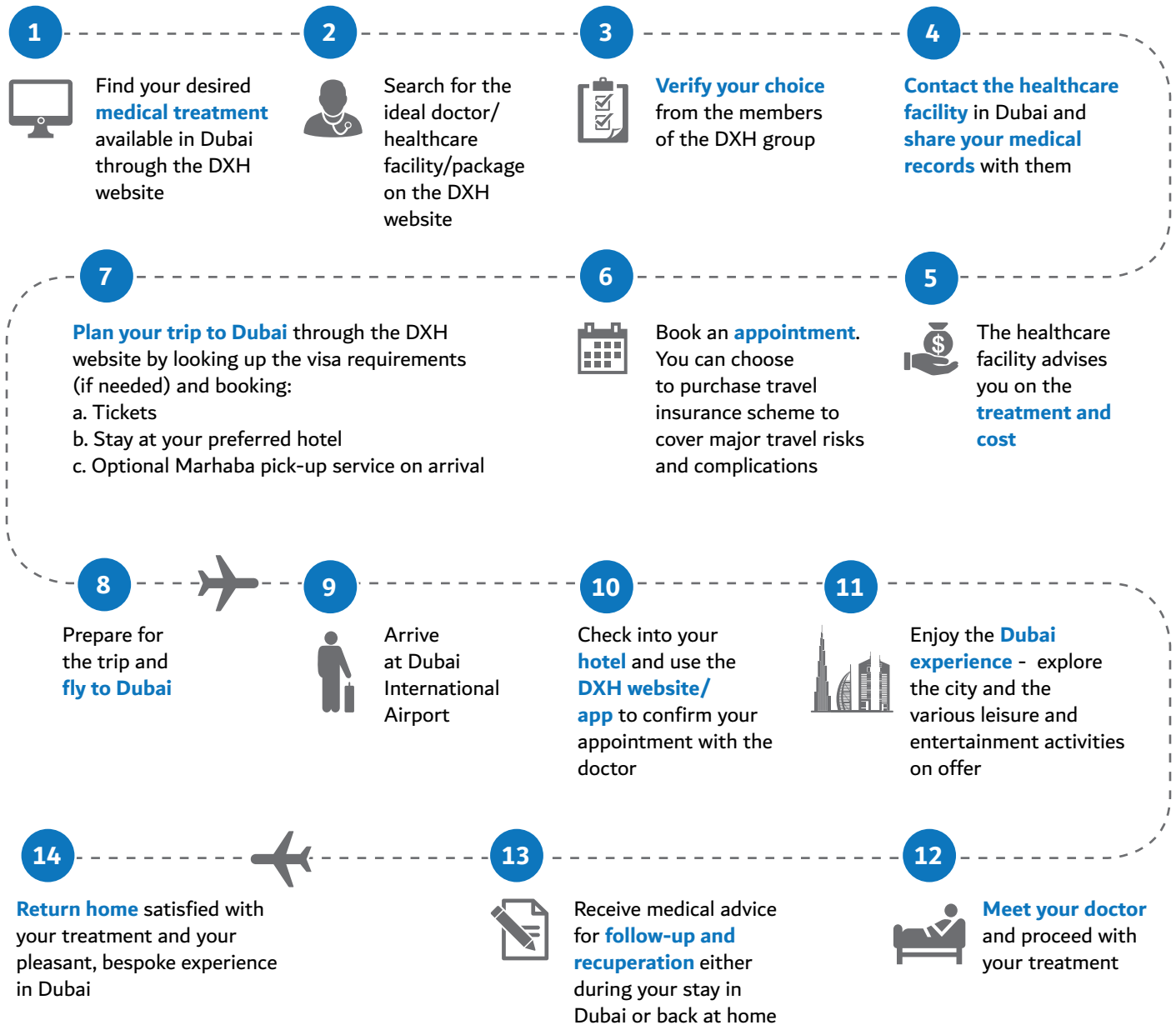
"Dubai's attractive location along with the availability of high quality medical professionals and technology has enabled the city to build a strong and favourable platform to build its medical tourism capabilities. We are constantly working on developing this sector keeping in mind patient safety, high quality health services, and excellent patient experience."

His Excellency Humaid Mohammed Obaid Al Qutami

Director General, Dubai Health Authority

Source: DXH Media Centre, "Dubai Health Authority announces launch of the 1st Dubai International Medical Tourism Forum", 1/23/2018

DHA has created a tourism portal to ensure that medical visitors enjoy the best possible experience in the city



Dubai is a recognised hub for health tourism



Best Integrated Destination for Medical Tourism award at the 10th International Exhibition and Conference on Medical Tourism (2015)



Highly Commended Destination of the Year award from the International Medical Travel Journal (2015)



Winner of the Chairmanship of the Global Healthcare Travel Council (2017)



UAE is ranked #1 in the number of internationally accredited facilities by the Joint Commission International



“One of the key attributes of the city that makes it competitive is its infrastructure in both the hospitality and health and wellness sectors. It is imperative that the infrastructure that supports the industry is robust and constantly expanding to keep up with growing demand hence providing opportunities for investments in this sector.”

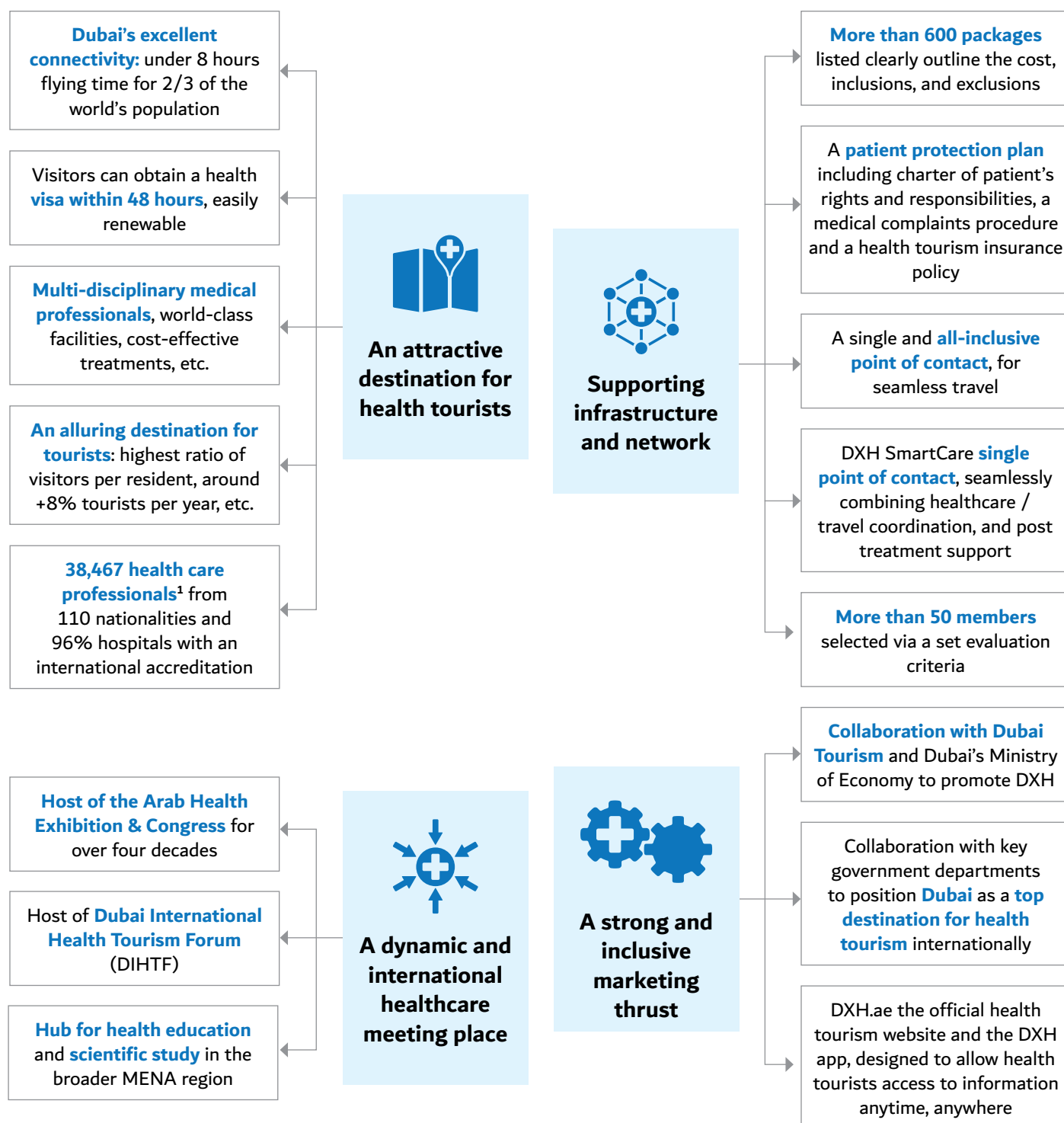
Dr. Layla Al Marzouqi

Director, Health Tourism Department, DHA

Source: DXH Media Centre, “Dubai Health Authority announces launch of the 1st Dubai International Medical Tourism Forum”, 1/23/2018



Dubai Health Experience (DXH) is part of Dubai's health tourism strategy, aiming to position Dubai as a global destination for health tourism



USEFUL INFORMATION

Dubai Health Experience (DXH): www.dhx.ae

KEY POINTS OF CONTACT

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Dubai is the Host City for Expo 2020

Dubai will host the World Expo between **October 20th 2020 and April 10th 2021**, making it the first universal exposition to take place in the Middle East, Africa or South Asia. The theme for Expo 2020 Dubai is “**Connecting Minds, Creating the Future**” and is underpinned by the three interwoven themes of Opportunity, Mobility and Sustainability, **seen as fundamental in addressing the most pressing issues of our time.**



إكسبو 2020
دبي، الإمارات العربية المتحدة
DUBAI, UNITED ARAB EMIRATES

OPPORTUNITY



How can we realise our potential and dreams of the future?

MOBILITY



How can we access people and reSources to achieve that potential?

SUSTAINABILITY



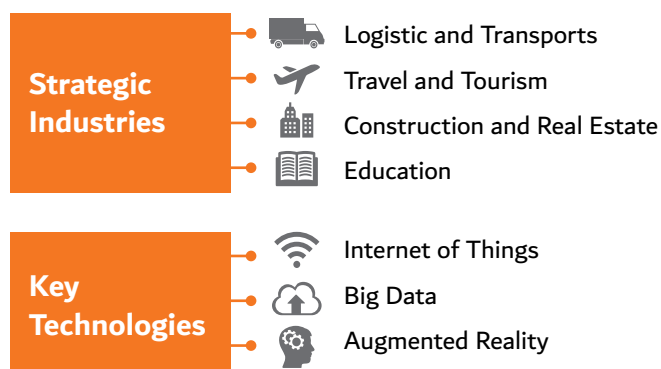
How do we pursue our dreams and goals wisely, protecting the needs of future generations?

These themes not only set out the objectives for Expo 2020, but also inform the way in which the whole event will come together, from the development of participants' pavilion concepts to the management of operations and logistics during the actual event. They influence all aspects of the build-up and guide contractors and suppliers in pitching and delivering their services.

Snapshot of Expo 2020 Dubai



An ecosystem to connect, create and innovate



Where countries, corporations and organisations meet

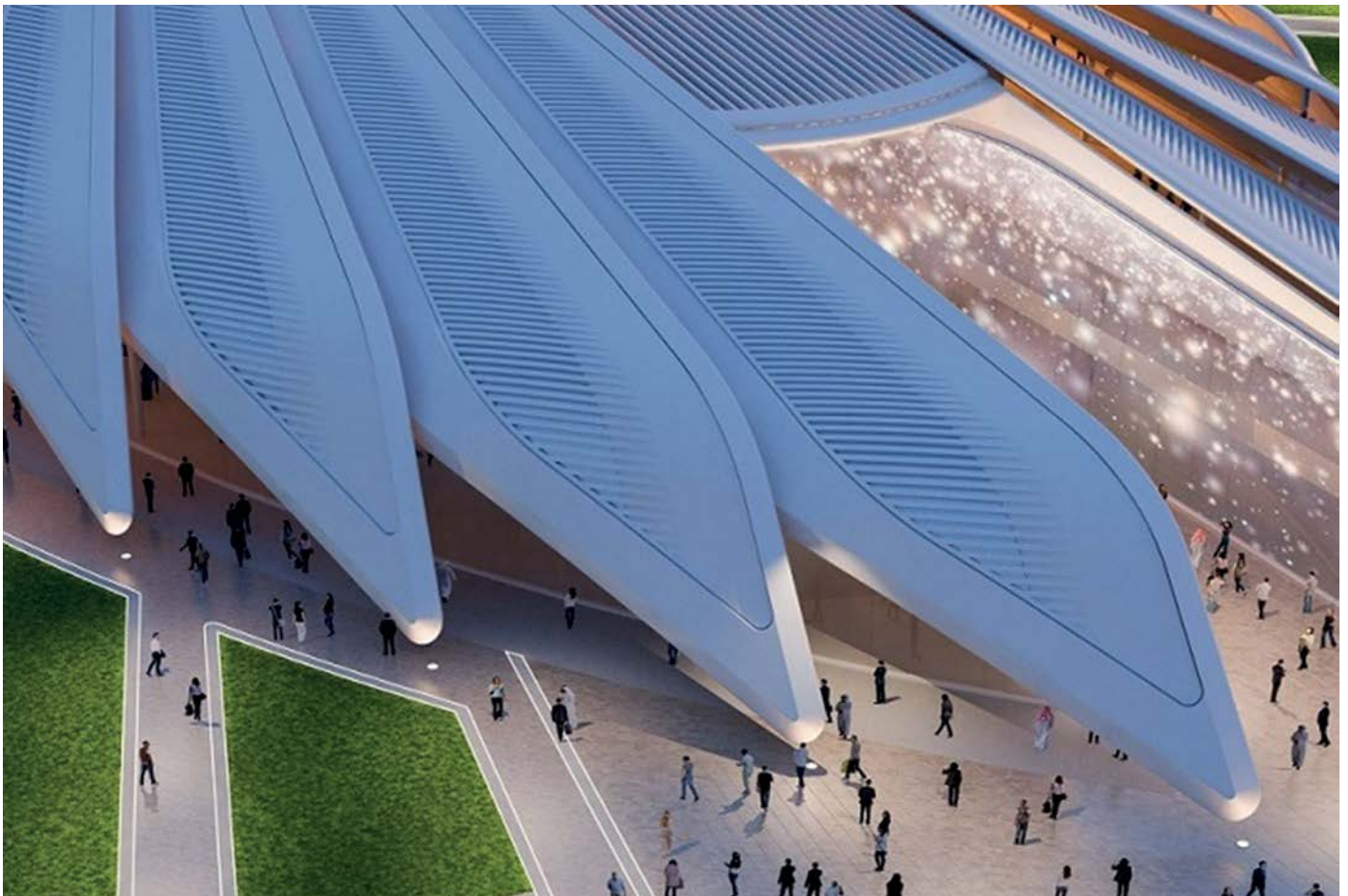


Expo 2020 will also address **Healthcare** and other **related sectors**

The Expo 2020 site will showcase innovation, encourage collaboration and celebrate human ingenuity

Set on a 438-hectare site and including a 2km² gated area, Expo 2020 will be roughly half-way between the city centres of Dubai and Abu Dhabi, making it a UAE-wide endeavour. The site is planned as a permanent part of the city's future, not a temporary addition, with 80% of the site currently designated for reuse or repurposing after the event's conclusion.

The exhibition district sits within the masterplan for Dubai South, which incorporates Al Maktoum International Airport, as well as five other distinct districts allowing for commercial and residential development, a logistics hub and business park, an aviation district and a golf district.



UAE Pavilion Expo 2020

Dubai Future Accelerators

Dubai Future Accelerators is an intensive 9-week programme that **pairs top companies and cutting-edge entrepreneurs** with strategic stakeholders in Dubai to create innovative solutions together.

مسرعات دبي المستقبل

DUBAI FUTURE ACCELERATORS

Dubai Future Accelerators was launched in 2016 by **His Highness Sheikh Hamdan bin Mohammed bin Rashid Al Maktoum, Crown Prince of Dubai and the Chairman of Dubai Future Foundation** under the directives of **His Highness Sheikh Mohammed bin Rashid Al Maktoum, Ruler of Dubai**. Since its inception, Dubai Future Accelerators has hosted **4 cohorts** with **149 companies** participating from over **25 countries**.

VISION

"To make Dubai the birthplace of exponential technologies that will shape the course of humanity over the next century."

MISSION

"To imagine, design and create the future by facilitating partnerships between forward-thinking entrepreneurs and the government using the city of Dubai as a living testbed."

Dubai Future Accelerators supports DHA's health strategy by:

- **Working with startups** on cutting edge and innovative technologies related to the **care model innovation programme**
- **Accelerating DHA's access** to these innovative technologies and championing their adoption, for Dubai to become the **hub for futuristic technologies** in healthcare

For example: physiotherapy sensors that can be used by patients at home to continue their physiotherapy sessions

KEY STEPS IN THE SELECTION PROCESS:

- 1 **Identification** and **communication** of a challenge faced by DHA / other government partners
- 2 Receipt of **applications**, **screening** and **shortlisting** of top companies
- 3 **Virtual interview** and **selection** of companies that will participate in the cohort
- 4 **Workshops** are held over 9 weeks, involving selected companies and stakeholders
- 5 End of cohort and discussions about **potential partnerships** (MOU) with DHA
- 6 If validation of the project, **pilot sessions** and projects with DHA facilities and units



4 cohorts have graduated from the Future Accelerators programme and **DHA** has **signed 12 MOUs** to pilot different technologies

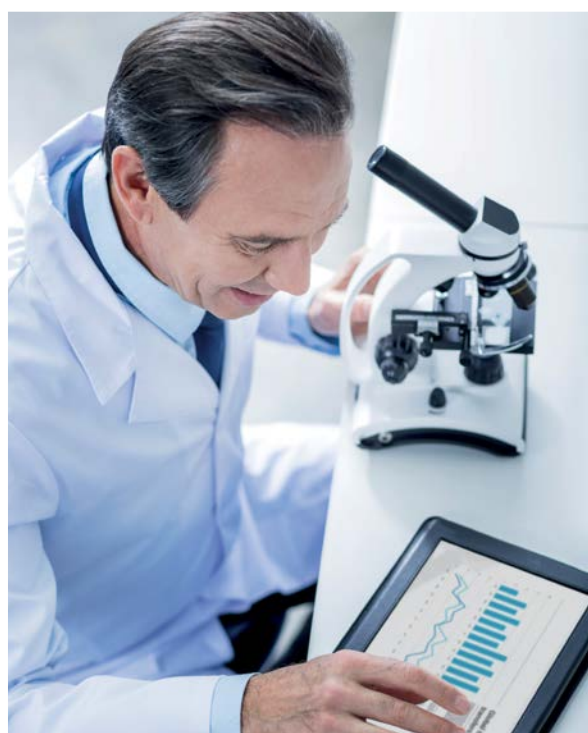


“DHA is keen to be at the forefront of health technology and aims to establish an integrated global platform for the future of healthcare and to create economic value based on embracing and adopting future innovation and technological solutions.”

His Excellency Humaid Mohammed Obaid Al Qutami

Director General, Dubai Health Authority

Source: DXH Media Centre, “Dubai Health Authority announces launch of the 1st Dubai International Medical Tourism Forum”, 1/23/2018



USEFUL INFORMATION

Dubai Future Accelerators : www.dubaifutureaccelerators.com

Dubai Future Foundation: www.dubaifuture.gov.ae

KEY POINTS OF CONTACT

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Dr.Shatha Saif, Senior Administrator Officer | sssaali@dha.gov.ae

Other Free Zones in Dubai

There are 27 free zones in the Emirate of Dubai covering sectors such as healthcare and science, higher education, art and design, banking and finance, trading, manufacturing, etc.

Amongst many others, the key advantages of free zones in Dubai are:

- 100% foreign ownership
- Exemption from personal taxes
- 100% repatriation of revenue and profits
- Relatively easier documentation
- Long term leasing options
- Simplified recruitment and workforce process

In addition to Dubai Healthcare City and Dubai Science Park, there are two other relevant free zones for investors in healthcare: **Dubai Silicon Oasis** focused on hi-tech and **Dubai Multi Commodities Centre** a made-for-trade free zone.



As the region's technology park, DSO's hi-tech ecosystem is **specifically designed for technology-based organisations** to interact and support one another so that ideas, technology and business may thrive.

DSO is dedicated to promoting technological collaboration and innovation and caters to the high-tech sector by supporting companies and services in a **wide range of sectors** including:

- IT, telecom, electrical, electronic, engineering and related activities
- Consultants, law firms, finance institutions, and other professional services
- Bio-tech, automobile, aerospace, oil and gas, alternative energy and other industries



Moreover, DSO's high-tech ecosystem consists of **six types of key players**

- Large enterprises
- Startups and medium-sized businesses
- Venture capital funds
- Universities and incubators
- Hi-tech infrastructure
- Government and business services

In terms of **services** for companies, DSO offers an array of high-quality facilities with state-of-the-art infrastructure, systems and equipment as well as plots of land on which companies may establish their own premises.

For **startups and new companies in the region**, DSO offers mentorship programmes, access to MENA markets, introduction to a large network facilitating business development and relationships, advice on market strategy and business planning, etc.



i Dubai Silicon Oasis is also the home to an **upcoming 235 bed, state-of-the art tertiary-care hospital** and medical university.

DSO is an 'integrated' city within a city offering a plethora of **residential and lifestyle facilities**, including over 1,500 villas, numerous apartments, the DSOA University residence, etc.

USEFUL INFORMATION

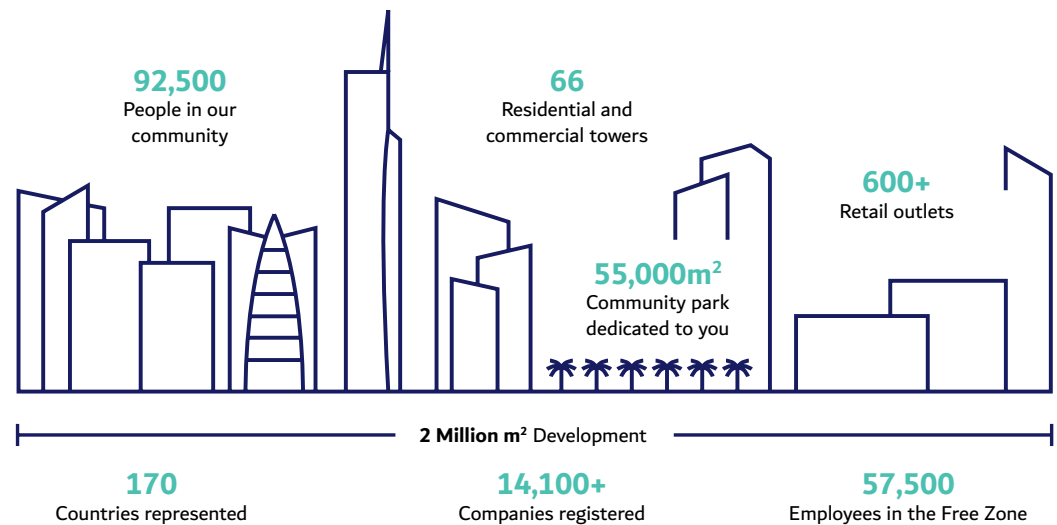
www.dsoa.ae | inquiries@dso.ae

Phone: +971 4 501 5000



DMCC is a government entity established in 2002 to enhance commodity trade flows through Dubai. It performs a range of roles which continue to position Dubai as the **preferred destination for global commodities trade**, and DMCC as the world's No.1 Free Zone. As endorsed by the 'Global Free Zone of the Year' award from the Financial Times fDi magazine for three years now, **DMCC** is indeed, **made for trade**.

Today over **15,000 companies** call DMCC home. A further 170 companies join this free zone every month, 95% of which are new to Dubai. Almost **90,000 people** live and work at DMCC attracted by its vibrant community, stunning properties and high-quality lifestyle.



Driving digital innovation: AstroLabs Dubai – the region's only Google-partnered tech centre

As part of the drive to fast-forward the region's digital economy, DMCC has partnered with AstroLabs Dubai, the only Google-partnered tech centre in the Middle East North Africa (MENA) region. Through a special license enabling start-ups to work in a **collaborative community of like-minded entrepreneurs** this centre includes coding facilities for programmers, a mobile device development lab, AdWords, digital marketing, UX/UI design and start-up development, etc.



Examples of sectors established in DMCC

- Medical engineering services
- Medical equipment rental
- Medical spa centre
- Medical, surgical equipment and instruments trading
- Home Healthcare centre
- Health awareness services
- Pharmaceutical research and studies



i DMCC is also home to **the first telehealth company set-up in Dubai**, regulated by the Dubai Health Authority. Dubai Multi Commodities Centre is also part of the **Jumeirah Lake towers community**, it is **close to significant residential** developments and to **other key projects** such as Al Maktoum International Airport and the Dubai Expo 2020.

USEFUL INFORMATION

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Key Tools for Health Investors in Dubai

SHERYAN PROJECT

An online system to facilitate Licensing of Health Facilities and Healthcare Professionals

Sheryan is the online licensing and inspection system of Dubai's Health Regulation Sector, Dubai Health Authority. Its latest version is a one-stop-portal powered by emerging technologies and supported and enabled with AI and innovation to provide citizen-centric experiences.



Key Functionalities of Sheryan



For **Health Facilities**

- New Facility License
- Change Facility Name, Location, Medical Director, etc.
- Transfer ownership
- Add or Remove a Specialty from an existing Facility License



For **Healthcare Professionals**

- New Professional License
- Add/ Upgrade/ Renew/ Cancel an existing Professional License
- Print Duplicate Professional License
- Good Standing certificate



Key benefits of the new Sheryan program



See: Online Licensing (Sheryan)

HEALTH SERVICES NAVIGATOR

A new initiative to support Investors in accessing health planning data in real time, while also providing patient community with information on available health services

As part of its Investment & PPP's strategy 2017-2020, Dubai Health Authority has implemented the **Health Services Navigator** initiative, aiming to provide a dynamic view of Dubai's healthcare sector and to provide investors with real time information on demand, supply and gaps for services in the Emirate of Dubai.

The **Health Services Navigator** allows to:

1

Help **patients, tourists** and members of the community to **find health facilities**, and to get **access to details about their services**

2

Helps **investors** to **get access to health planning data**¹, including demand, supply and gaps for health services across Dubai's communities



Type of facility



Name



Location



Clinical Services



Types of insurance accepted



Operating hours



Contact details



Browse **population data** by year



Visualise supply, demand, and gap by community, planning unit (clinic, acute IP bed, ICU, etc.) and by year



Apply filters and **select specific health services** to visualize changes in demand and supply



Load **statistical datasets** and print **health service reports**



Zoom by Sector, including population, supply, demand and gaps



See **current and planned health facilities**

The access to this information would be through authorized DHA team members. Please contact the InvestmentS & PPP's department

Dubai Health Services Navigator: Undergoing final validation, to be released soon

DUBAI HEALTH INVESTMENT GUIDE 2018

The Dubai Health Investment Guide 2018 has been developed as part of DHA Strategy 2016-2021 and its Investment and PPP's initiative. It aims at fulfilling the following key objectives:



Inform potential healthcare investors and operators about the attractiveness of the Dubai market



Align investment priorities with clinical capacity plan results



Educate investors about the current investment ecosystem in Dubai, and the governance and regulatory framework



Promote healthcare investment in Dubai to attract the right investments in Dubai's healthcare sector



Conceived and developed by:



Investments & PPP's Department

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