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OPPORTUNITIES FOR DUTCH BUSINESSES
IN THE GULF REGION

LIFE SCIENCES & HEALTHCARE 



This report is commissioned by **Holland+You**. Holland+You is initiated by the Dutch economic network in the GCC to connect business needs in the region with Dutch solutions. It aims to create a platform for interaction between Dutch and Gulf business stakeholders online and offline. For more information please visit our website www.hollandplusyou.com or contact us at hollandplusyou@minbuza.nl.

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For the composition of the information in this report several sources have been consulted, among others the reports about the healthcare and pharmaceutical sectors in the GCC written by the Alpen Capital Group, Al Masah Capital, Colliers International, Deloitte, Busi-ness Monitor International, PWC, World Bank Group, International Monetary Fund.

1 INTRODUCTION

The six Gulf Cooperation Council (GCC) states (UAE, Saudi Arabia, Qatar, Bahrain, Kuwait and Oman) have witnessed a substantial growth of the healthcare market in recent years. The introduction of health insurance, strong population growth, an ageing population, rapid urbanisation and lifestyle diseases such as diabetes, cardiovascular problems and obesity have contributed to an increased demand for high quality healthcare services¹. These investments have also resulted in substantial improvements in health outcomes, such as reduced childhood mortalities and increased life expectancy.²

The population growth in the GCC has been substantial and it is projected to reach 53.5m by 2020, an increase of 30% from 2000³. The healthcare market in the GCC is projected to grow at 12 per cent per annum to USD 69.4 billion by 2018⁴ with Saudi Arabia projected to remain the largest market in the region. Growth in this market is expected to be the largest in Qatar and the UAE.

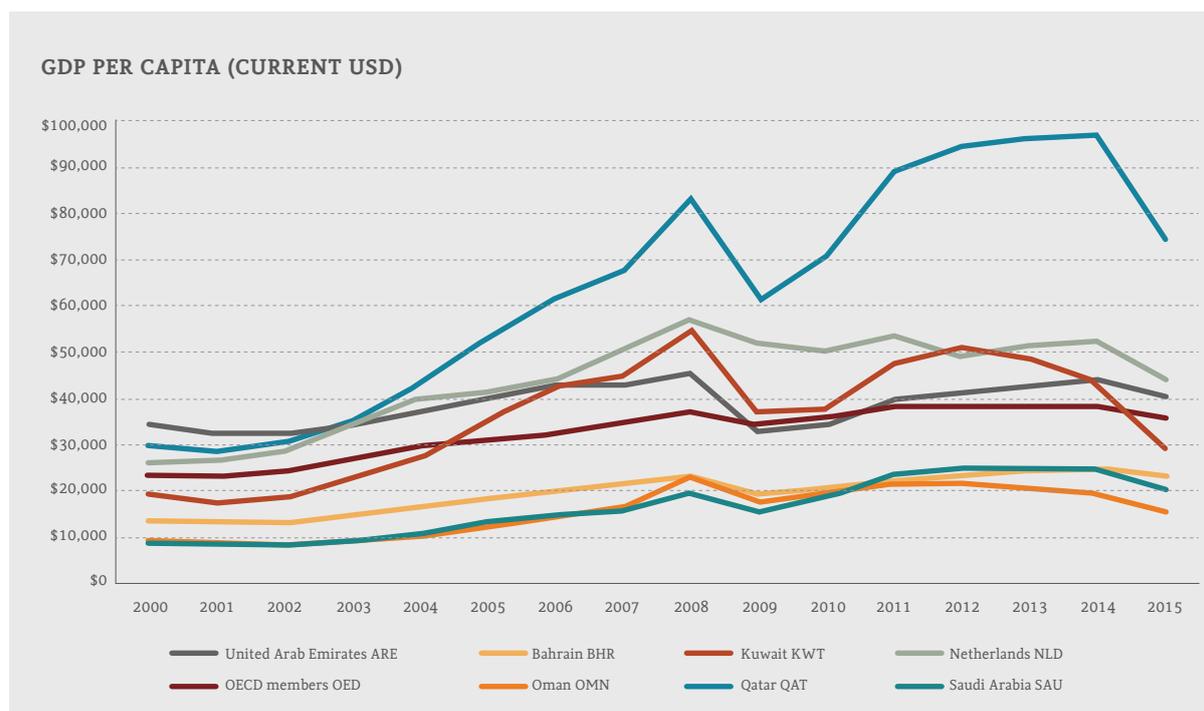
Overall, GCC governments fund between 65%-85% of healthcare expenditure⁵. The GCC governments also play an important role in the development of the healthcare sector and are taking steps to improve the healthcare infrastructure and to help the industry to grow to international standards. Initiatives such as healthcare-focused free zones, government grants, public-private partnerships and preferential loans help attract providers and associated medical services to the GCC. Across the region the average healthcare expenditure as a percentage of gross domestic product (GDP) is estimated at 3 per cent, compared with 11 per cent in the Netherlands and more than 17 per cent in the USA⁶.

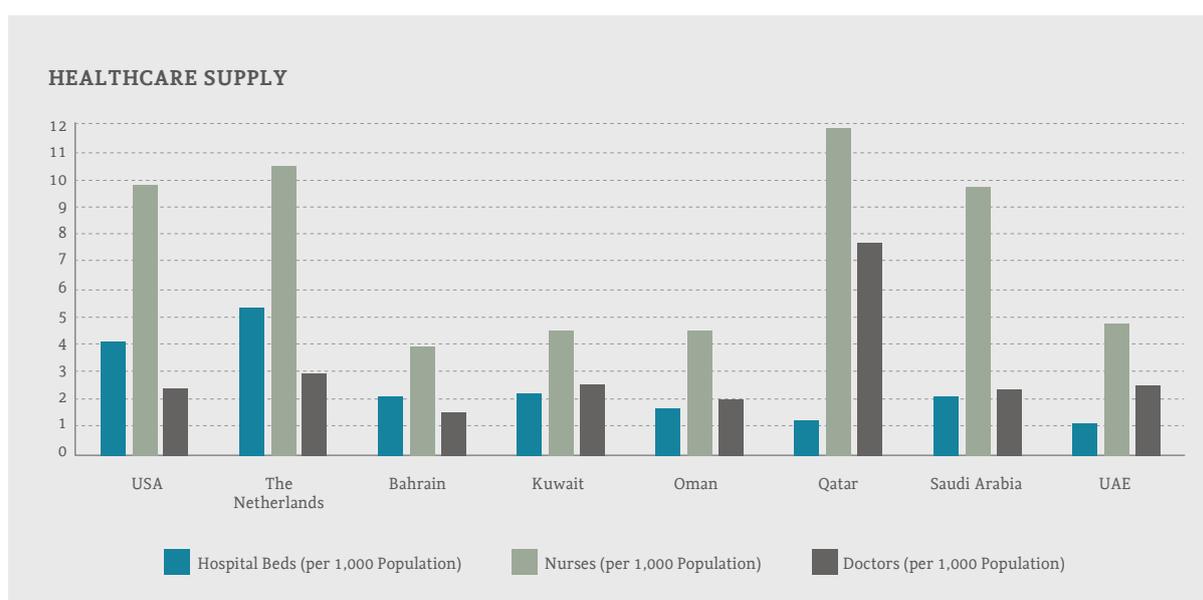
These factors combined create attractive opportunities for private sector participation and investment in the region. For example, the GCC countries import virtually all their medical equipment and supplies and remain highly dependent on foreign-trained physicians, nurses and allied health professionals.

The pharmaceutical market in the GCC has witnessed considerable progress over the years due to the favourable demographic and economic factors. Despite the progress, the pharmaceutical sector in the Gulf is still in an emerging phase. The governments plan to increase local drug manufacturing and reduce reliance on imports by encouraging joint ventures and licensing arrangements with multinational pharmaceutical companies. However, currently, imports still account for 80 per cent of the total pharmaceutical market.

With an aim to reduce the healthcare cost burden on their governments, GCC countries are gradually moving towards a market-based model, with an emphasis on privatization and mandatory health insurance. Growing insurance penetration will ensure rise in healthcare spending, and will draw additional private investment into the healthcare sector and broaden the range of services on offer.

The purpose of this report is to give Dutch businesses an insight in the Gulf's life sciences and healthcare sector and help them to identify possible business opportunities. The focus of this report is especially on Saudi Arabia, the UAE and Qatar.





Source: World Health Organization

2 MAJOR DRIVERS PER GCC COUNTRY

2.1 Kingdom of Saudi Arabia

The healthcare market in Saudi Arabia is the largest in the GCC and has grown from USD 11 billion in 2005 to USD over 25 billion in 2015. The growth will be mainly driven by the growing population – which increased by 6.8 million over these 10 years – and improved life expectancy. Future forecast is a more moderate increase to around USD 28.3 billion healthcare spending in 2020⁵.

QUICK FACTS: SAUDI ARABIA'S HEALTHCARE MARKET

Saudi Arabia	2005	2010	2015
Population (million)	24.7	28.1	31.5
GDP (billion USD)	328.5	526.8	646
Healthcare spent (%GDP)	3.40%	3.50%	4.70%

In 2016, the Saudi government launched its ambitious national vision, Vision 2030⁷, outlining key strategies for economic, societal and cultural growth over the next two decades. In terms of healthcare, the strategy emphasizes the promotion of a healthy and balanced lifestyle with a strong focus on preventative care and a gradual separation between public and private sector. The public sector's role in the provision of healthcare will gradually diminish, in favour of private sector investment, whilst at the same time the public sector will strengthen its role and function in provided oversight, planning and regulation. Vision 2030 will be implemented through a central National Transformation Plan (NTP), the Saudi Ministry of Health is responsible for 16 Strategic Objectives.

Much of Saudi Arabia's GDP is reliant on their oil exports. In recent times the price of oil has fallen significantly resulting in the Saudi Government's attempts to diversify its economy. Despite this recent decline, the International Monetary Fund⁸ forecasted a growth of almost 2% in 2017.

Notwithstanding this, huge progress has already been made and the number of hospital beds has risen steadily from 49,148 in 2006 to 55,932 in 2008 and 58,126 in 2010⁹ a. The bed capacity at Ministry of Health hospitals is by far the largest, accounting for around 59 per cent of cumulative hospital bed supply in Saudi Arabia.

2.1.1 Main Strategic Government Agenda

Up until the collapse in oil prices, the Saudi government aggressively implemented policies to build infrastructure and enhance private sector participation in response to the rising demand for healthcare services. Government spending as percentage of overall healthcare spending has stayed relatively stable over the last decade, accounting for around 70% of all healthcare expenditure⁶.

Except for emergency admissions or life-threatening illnesses, the public sector in Saudi Arabia provides free care exclusively for the country's 20 million Saudi citizens. Following in the footsteps of other GCC countries, Saudi Arabia has implemented mandatory health coverage for all expatriates. Essentially the government placed the choice of provider in the hands of the individual, which has resulted in significant increases in the demand levels for the private sector. The implementation of a similar rule is expected for Saudi nationals, which would even further add to the increasing demand of private health services.

2.1.2 Opportunities, Investments, Developments

Certain features of the Saudi Arabia healthcare market are unique and offer a solid basis for new business opportunities for a diverse range of healthcare companies from the Netherlands.

First, the Saudi population is relatively young but slowly aging. The healthcare industry has started to prepare itself for an increased demand for long term, post-acute care and home care services but early indications are that as a whole the GCC region is ill-prepared for the future demands.⁴ The current lack of supply of long term and post-acute care within the region has also contributed to an increase in International Patient Care.

The demand for innovative, evidence based and high quality treatment outside of Saudi Arabia is not diminished over the last decade or so. Many GCC nationals continue to travel abroad for medical treatment. This is an opportunity of interest to companies from the Netherlands, since the Dutch healthcare system has consistently ranked by the Euro Health Consumer Index (EHCI) as the best country in Europe when it comes to the quality of healthcare¹⁰. As a matter of fact, the EHCI has ranked the Netherlands the number one country in Europe since 2008.

At present the Saudi healthcare sector is structured to provide a basic platform of services to all, with specialised treatment facilities offered at some private and public hospitals. However, Saudi Arabia has started to invest in new, innovative delivery models, such as 'medical cities', which will focus on specialist treatments, complicated surgeries and treatment of rare diseases and primary care. These kinds of new facilities are being created to put the most recent technology to use and advances are being made in research in both medicine and biomedical sciences.

Probably the biggest challenge for the Saudi health system challenges is the escalating crisis of non-communicable diseases (NCDs) and injuries. The prevalence of non-communicable or 'lifestyle' diseases in the GCC region is among the highest in the world. Currently, a quarter of GCC citizens are obese or overweight¹¹. GCC countries are faced with the rising burden related to cardiovascular diseases, diabetes, cancers, chronic respiratory diseases and road traffic injuries¹². Many opportunities exist to showcase how the Netherlands has managed to deal with some of the major adult risk factors for non-communicable diseases such as obesity, physical inactivity, diet, tobacco use, and raised blood pressure.

Most GCC countries have recently introduced or are considering introducing mandatory health insurance, to better manage and control the increases in healthcare expenditure. In Saudi Arabia recently introduced health insurance for its expatriates workers and in terms of health insurance premiums, the market is dominated by three companies: Tawuniya (20%), Bupa (19%) and Medgulf (15%), capturing together 54 per cent of the Gross Written Premium¹³, even though there are over 30 licensed insurance companies. This indicates a potential threat to healthcare providers, as it restricts their bargaining power to set discount levels with the insurance companies. On the other hand, it offers the opportunity for healthcare providers to reduce administrative costs, because they only deal with a small number of insurance companies. The increased demand for healthcare insurance creates multiple opportunities, as the Netherlands has successfully implemented a well governed insurance based health system.

Finally, the acquisition, retention and continuous education of healthcare professionals is a key priority in the GCC region⁴ and there are multiple opportunities for Dutch companies to provide assistance and support. The availability of medical personnel in Saudi Arabia is not in line with its growing population. At the end of 2012 there were 24.4 doctors per 10,000 people. Most physicians in the nation are expatriates, with local Saudi doctors constituting only a quarter of the total Saudi physician workforce in 2012. To counter the shortage of physicians the government is establishing medical colleges in 24 universities across the nations. The Ministry of Health is focusing on increasing the number of indigenous doctors to be nearly half of the total doctors available by 2020. Setting up medical colleges would be a key initiative to help achieve the targets. Efforts are being made to encourage more young Saudis to enter the nursing profession and overcome societal concerns. To meet with this demand for local employees, the country's universities, medical, dental and nursing schools have an increasing supply of newly qualified doctors, dentists and nurses. Large numbers of students study for medical qualifications abroad under the so-called King Abdullah Scholarship Programme (KASP).

2.1.3 Major Players and Companies

The public sector continues to play the leading role in terms of the planning, supervision, regulation and provision of healthcare in Saudi Arabia. As noted before, the government's aim is to privatize the provision of healthcare services over the next decade. However, the **Ministry of Health** (www.moh.gov.sa/en/) will remain the main player.

All medicine and medical devices bought by Saudi government institutions are supplied by the **National Unified Procurement Company** for Medical Supplies (NUPCO, <http://www.nupco.com/web/en>), a firm that was established in 2007 to help reduce inefficiencies in procurement and to keep prices down.

The Saudi Food & Drug Authority (SFDA, <http://www.sfda.gov.sa/en>) oversees and ensures the safety of food, drugs and medical device and publishes and advises on any threats to public health. The SFDA was created in 2003 as an independent body reporting directly to the Council of Ministers.

The National Guard Health Affairs (NGHA) is one of the largest health organisations in the Kingdom of Saudi Arabia, providing modern medical care to National Guard employees and their families. It consists of medical cities, facilities and hospitals, the major and largest being King Abdulaziz Medical City in Riyadh. (www.ngha.med.sa/english/)

2.1.4 Market Access / Foreign Investment

Given the high quality of Dutch manufacturing products, these are generally accepted on the Saudi market as long as they comply with health, safety and religious standards. The local Saudi partner can usually provide more specific information about requirements.

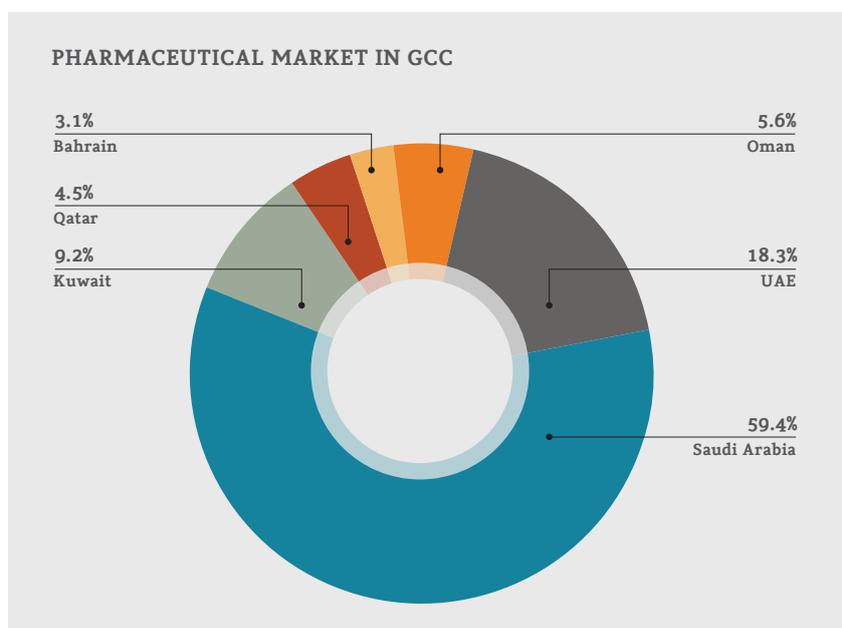
2.1.5 Legislation (tenders, certification)

Foreign investors interested in doing business in Saudi Arabia will need a local partner who can do business on their behalf, or should form a legal partnership with a Saudi company in which they can be a (minority) shareholder. As is common in most part of their globe, doing business in Saudi requires an extensive local network.

2.1.6 Market trends

Lifestyle-related diseases such as diabetes, obesity and cardiovascular diseases are highly prevalent in the GCC Region, including Saudi Arabia. One of the key pillars of the Government's transformation strategy is to tackle the economic and social burden of the so-called lifestyle diseases. This will be one of the main drivers of the Saudi healthcare sector in the coming years.

While Saudi Arabia has the biggest domestic pharmaceutical manufacturing industry among Gulf States, it still imports 85 per cent of its medicine and 90 per cent of its medical equipment.



Source: Business Monitor International, Alpen Capital

2.2 United Arab Emirates

The United Arab Emirates (UAE) is one of the most organised and fastest-growing healthcare markets in the region, with around USD 16.8 billion spent on healthcare in 2014⁶. It remains among the priority sectors identified by the government, not only to diversify the oil-reliant economy but also to develop a strong healthcare infrastructure to ensure adequate services throughout the country. The UAE has focused its efforts in diversifying its economy and the IMF's outlook for GDP growth in the UAE is still quite positive, IMF predict a 2.5% growth in 2017 and 3% growth in 2018⁸.

QUICK FACTS: UAE'S HEALTHCARE MARKET

United Arab Emirates	2005	2010	2015
Population (million)	4.5	8.3	9.2
GDP (billion USD)	180.6	286	370.3
Healthcare spent (%GDP)	2.31%	3.93%	3.64%

Source: World Bank⁶

The rapidly growing population, rising patient expectations, continued economic growth, aging population as well as chronic lifestyle induced diseases and injuries are likely to be the drivers for healthcare services in the UAE for the coming years. The country is looking to improve both its hard and soft healthcare infrastructure and is increasingly looking to private players to share investments and speed up the process.

The total expenditure on health as a percentage of GDP is still relatively low in the UAE (3.6%) compared to the Netherlands (10.9%) and the US (17.1%) but also compared to other GCC countries like Saudi Arabia (4.7%).



Socio-economic developments in the UAE have dramatically changed the lifestyle of most of its citizens, as well as expatriates. Rising affluence and lifestyle changes have contributed to an increase in diseases such as diabetes, coronary and cardiovascular, hypertension, cancer, allergies, respiratory, and skin diseases. Major risk factors that are causing this trend include the population's unhealthy diet choices, lack of physical activity, incidences of being overweight and obesity, and smoking. Also, the hot weather makes walking difficult and encourages an excessive use of cars.

2.2.1 Main Strategic Government Agenda

The UAE Government has recently embarked on a new strategy, Vision 2021¹⁵, with as its main goal to be amongst best countries in the world by 2021. The development of the national healthcare sector forms an integral part of the UAE's government strategy. The government aims to ensure access of all citizens and residents to primary healthcare, and improve the quality of healthcare services to global standards. It also seeks to reduce lifestyle diseases and increase the readiness of the health system to deal with epidemics and health risks.

To keep up with the demand for healthcare the UAE government is increasingly looking towards privatization, by attracting foreign investment, as well as Public Private Partnerships (PPP)¹⁶. Examples of high-profile partnerships that welcome western technology, practices, and standards to Abu Dhabi are the Cleveland Clinic and Johns Hopkins. These two renowned private players are now managing hospitals in Abu Dhabi under long-term management contracts¹⁷.

Another key pillar of the strategy is to introduce mandatory health insurance for all UAE residents. Whilst Abu Dhabi introduced health insurance in 2006, it took almost another decade before it was introduced in Dubai. The final phase of the health insurance roll out includes the remaining, smaller five Emirates¹⁸.

2.2.2 Opportunities, Investments, Developments

Possibly the largest driver in the UAE healthcare industry is the mandatory health insurance system. The UAE government long term goal is for a highly effective healthcare insurance system to lead to improve performance and better patient outcomes. Insurance coverage is also a key driver of hospital's investment in technology. Establishing partnerships between healthcare private providers based on shared services, resources and equipment will help to improve the quality of healthcare in the country and patient's access to advanced and expensive technologies.

Mubadala Healthcare is playing an instrumental role in the creation of a thriving private healthcare sector in Abu Dhabi. Mubadala tries to establish long-term partnerships with renowned international institutions to build sustainable businesses, create regional capacity, and to stimulate the overall development of the sector. A good example is the Cleveland Clinic in Abu Dhabi; Mubadala Healthcare provides the capital and local business acumen, while Cleveland Clinic brings the clinical expertise to manage and operate the hospital.

Like most of its neighbouring countries, the UAE suffers from a shortage of healthcare professionals, including doctors, physicians, dentists, nurses and support staff. Managing staff from different cultures, medical approaches and practices, and creating patient care standards that all the staff can adapt is one of the major challenges faced by healthcare providers. Regulatory reform is taking place to harmonizing the professional licensing process within the UAE.

By 2018, the UAE will have 33 pharmaceuticals factories, increasing from 15 currently. Three factories will be opened by the end of 2015, and another 15 are in the pipeline. In 2013, the drug market in the UAE was worth USD 1.4 billion. Of this, patented drugs made up 66 per cent, generic drugs 16 per cent, and over the counter (OTC) medications 18 per cent. The UAE is still highly dependent on imported drugs, thereby giving room to private players to set up their own manufacturing capacities in the country. National drug expenditure in the UAE will reach USD 3.6 billion by 2019.

The UAE tends to devote a high proportion of total health expenditure to medical devices compared to developed nations. The pharmaceutical industry is expected to grow at a rate of 14.5%, predicted to reach USD 3.6 billion in 2019. The medical device market is worth around USD 360 million, with almost one third of devices imported from the USA and an expected growth rate of around 10%.

The UAE is one of the biggest markets for outbound medical tourism in the Middle East, but at the same time the number of patients traveling to the UAE (especially Dubai) to receive medical treatment is increasing rapidly¹⁹. The UAE is becoming an attractive destination for people from neighbouring GCC countries as well as Middle East and North Africa contributing to an estimated USD 1.6 billion income annually across the GCC²⁰.

The increase in the number of elderly (65+) during the past 15 years and the explosion of chronic diseases are shaping the future of the UAE and the government highly supports the development of the specialised care industry and homecare services.

2.2.3 Major Players and Companies

Since 2001, the UAE public health sector has been administered through three main zones: a southern zone encompassing the Emirate of Abu Dhabi, a central zone located in the Emirate of Dubai, and a third zone including the Northern Emirates. These three zones differ broadly in the way they are governed, as well as in matters of policy making and spending.

Ministry of Health and Prevention (MoH, <http://www.moh.gov.ae/en/>), provides overall regulation of the UAE healthcare sector, together with the Health Authority Abu Dhabi and the Dubai Health Authority and provides the majority of public healthcare facilities in the Northern Emirates.

Health Authority of Abu Dhabi (HAAD, www.haad.ae), regulates the healthcare sector in Abu Dhabi, it also sets healthcare policy, presents an annual report and plans for future.

Abu Dhabi Health Services Company (SEHA, www.seha.ae), is the public healthcare provider for the entire Emirate of Abu Dhabi.

National Health Insurance Company (Daman, www.damanhealth.ae), formed in 2005 as UAE's first specialised national health insurance company. Daman is backed by the Government of Abu Dhabi and has a market share of 85 percent in Abu Dhabi.

Mubadala Development Company (www.mubadala.ae), a wholly government owned investment vehicle of the Abu Dhabi government, mandated to facilitate the diversification of Abu Dhabi's economy, through business units operating a diverse range of strategic sectors, including Healthcare.

Dubai Health Authority (DHA, www.dha.gov.ae), is a Dubai government department which oversees healthcare, medical policy and strategy in Dubai, and monitors public and private hospitals, clinics, and medical centres in Dubai. DHA also owns and operates four hospitals and twenty clinics.

Dubai Healthcare City (DHCC, www.dhcc.ae), is a free zone dedicated to companies, services and products relates to the medical industry – hospitals, clinics, doctors, specialists, education. In 2010 DHCC had more than 2,000 licensed health care professionals, covering 60 specialties and speaking 30 different languages, 90 institutes, clinics, and other facilities including 2 hospitals.

DuBiotec (www.dubiotec.com) enables companies and universities to establish their own research facilities in the UAE, which in effect helps pharmaceutical companies eager to penetrate the region. Currently DuBiotec hosts 95 pharmaceutical and medical device firms.

2.2.4 Market Access / Foreign Investment

The UAE's progressive climate towards foreign cooperation, investment and modernisation has prompted extensive diplomatic and commercial relations with other countries. The UAE plays a significant role in international bodies such as OPEC and the UN, and is one of the founding members of the Gulf Cooperation Council (GCC).

The favourable geographic location of the UAE is strategic and accessible for major regional markets, it is often seen as a gateway to other GCC countries. Opportunities to do business in the UAE are not withheld by global economic difficulties or regional instabilities in the Middle East and North Africa region and the economy proves to be resilient.

2.2.5 Legislation (tenders, certification)

Healthcare is regulated at both the federal and emirate level. Federal level legislation dates to the 1970s and 1980s and there are pending legislative reform initiatives to facilitate the development of the healthcare industry.

The Ministry of Health has issued Registration Guidelines for medical devices, which set out the requirements for an application for regulatory approval. The registration system is intended to prevent unsafe or ineffective medical devices from entering the local market, while allowing patients access to medical devices that may help them.

Recent legislation in the UAE has allowed drug companies to apply for production licenses up to 24 months before patents run out on drugs, meaning generic equivalents can be available as soon as the patent expires.

2.2.6 Market trends

The World Health Organisation (WHO) estimates that a third of adults in the UAE are obese, and one out of five people live with diabetes¹⁴. As the incidences of lifestyle diseases increase, these populations, supported by relatively high levels of income, will demand greater quality of healthcare. Demand growth in this segment could act as an incentive for private investors to establish multi-disciplinary hospitals and specialised centres for complex diseases.

The medical devices market is projected to grow at an average annual rate of 8.3%, reaching USD 1.2 billion in 2017⁵. In 2012, all categories within this sector posted positive growth, however, consumables and orthopaedic and prosthetic devices were the strongest performing categories, at over 9 per cent.

2.3 State of Qatar

Qatar has been the fastest growing healthcare market in the region and expanded at a CAGR of 23% between 2006 and 2011. The country is investing heavily in its life sciences sector and healthcare to cater to the demands from a growing population. Over USD 2.4 billion of Qatar's 2011-2012 State Budget was earmarked for expansions and improvements within the sector. Liberalisation of investment laws and public-private strategic partnerships for new hospitals and health centres for expatriate workers will further develop the sector and present opportunities.

QUICK FACTS: UAE'S HEALTHCARE MARKET

Qatar	2005	2010	2016
Population (million)	0.84	1.8	2.2
GDP (billion USD)	44	125	167
Healthcare spent (%GDP)	3.0%	2.2%	2.1%

Qatar's aim of providing effective domestic healthcare services is coupled with aspirations to become the centre for research and development in healthcare and life sciences in the region. An important element in delivering this is the new medical and research centre – Sidra.

2.3.1 Main Strategic Government Agenda

Healthcare is a priority concern for the Qatari leadership. The country is faced with a relatively high rise in demand for healthcare. The Qatari government is constantly upgrading the quality health services using technology, international expertise and knowledge. In 2008 the Emir launched Qatar's vision for the future, Vision 2030²¹, outlining its strategic goals for the future. One of the core pillars of Vision 2030 is the development of an integrated system of healthcare, in line with world-class standards.

Qatar's current population is 2.2 million, of which around 20% are nationals and 80% expatriates²². Due to the expanding construction and rapid development works imposed by the pressing delivery date of 2022 for hosting the FIFA world cup, Qatar's population rise will continue to present a challenge for the healthcare supply and management. Qatar's hospital infrastructure is under enormous strain and despite having the highest per capita healthcare spend in GCC, Qatar lags behind in terms of hospital beds infrastructure. In fact, the country has the lowest hospital beds to population ratio among GCC countries (12 beds per 10,000 population in 2011).

In 2011, Qatar launched the National Health Strategy 2011–16 (NHS <http://www.nhsq.info/>), which aimed to transform the country's medical infrastructure. The strategy represented a shift toward a more active approach in disease prevention and early detection. Under this strategy the Qatar Health Facilities Master Plan (QHFMP) was conceived. Qatar aims to build 48 new healthcare facilities by 2020, with around 20 projects already completed.

To be able to deal with health risk factors, such as the high percentages of diabetes and obesity several awareness initiatives have been put in place. However, the treatment demand is still increasing.

To promote the private sector involvement the Qatari government has made major regulatory and policy changes such as using public funds to reimburse nationals for the private healthcare services they consume and defining and enforcing a single set of quality standards for both public and private providers. Private providers can decide to enter into government contracts to manage public facilities (PPP) or to run their own facilities. In Qatar, the Weill Cornell Medical College is a PPP venture involving Cornell University and the Qatar Foundation to cater to the shortage of local skilled healthcare professionals.

In 2013 Qatar enacted a mandatory health insurance law to bring both citizens and expats under its coverage. The new law is implemented in phases, and was further amended in 2016. This will further develop the healthcare sector and make it more competitive.

2.3.2 Opportunities, Investments, Developments

Opportunities for healthcare related companies in Qatar can be broadly broken down into the projects and areas below:

The Hamad Medical City Complex (www.hmc.org.qa) is a USD 1 billion project. When completed it will offer around 750 new bed spaces. The facility is not yet fully operational; opportunities exist for all medical supplies, which are tendered through the local press and through limited tenders (by invitation).

The USD 2.5 billion **Sidra** facility (www.sidra.org) is a 412 bed-teaching establishment with a focus on paediatrics and women's healthcare. Its research will focus on health conditions most affecting the region (e.g. diabetes, cancer, cardiovascular conditions) and on foetal-maternal health. The centre opened in 2016.

Aspetar (www.aspetar.com) is the first specialised Orthopaedic and Sports Medicine Hospital in the Gulf region. It provides the highest possible medical treatment for sports-related injuries and is staffed by some of the world's leading sports medicine practitioners and re-searchers. Qatar's aim at becoming the sports hub in the region together with its hosting of the FIFA World Cup 2022 has resulted in the expansion and development of this facility. Continuous development opportunities are available in Aspetar especially with innovative and state of the art technologies in the sports health sector.

Qatar's pharmaceutical market was valued at around USD 379 million in 2012 and is growing⁴. The purchase of pharmaceuticals by local health establishments is usually done in one of three ways; through local agents/distributors; directly from pharmaceutical companies; or through bulk GCC purchasing agreements. Despite these developments, the market requires more pharmaceuticals than presently available in Qatar.

According to industry estimates, the market for medical equipment will grow over the next five years⁴. The market relies on imports from Europe, Asia and the United States. Currently, the US is one of the leading exporters of medical equipment, medical supplies, medicines and pharmaceuticals to Qatar. Qatar's strong interest in importing medical equipment, healthcare technology and supplies is driven by the rise of new construction projects for hospitals and health care centres, and by Qatar's lack of local production capacity in this area.

The new hospitals and healthcare establishments that are being built all require hospital furniture (medical and non-medical). Opportunities exist for companies with a proven record of equipping large medical establishments. In general, companies with the ability to undertake the entire non-medical furniture package (as opposed to parts of it) have good potential in the market.

Attracting and retaining healthcare professionals and skilled administrators into the healthcare system remains a key challenge. The small number of local Qatari doctors coupled with new hospitals scheduled to come on line, will make staffing challenges more acute. Healthcare and medical education and training programmes are already underway to help deliver more healthcare professionals to the sector. Qatar has formed partnerships with foreign establishments now operating in Qatar. These include the University of Calgary-Qatar providing nursing training and the Weill Cornell Medical College Qatar. Opportunities exist for specialist healthcare professional placement companies with a global reach.

While providing additional medical facilities to cater to an increasing population, Qatar realises the need for raising public awareness of preventive care longer-term. Initiatives to change the reliance on tertiary care being delivered from hospitals towards delivery from primary healthcare centres present some opportunities.

The Qatar Science & Technology Park (QSTP) is home to many international companies conducting R&D, including life sciences. The park seeks to attract international companies to establish and conduct R&D activity within it. QSTP also assists its tenants to commercialise their technologies and programme outputs. Details of programmes being conducted at the park can be found at www.qstp.org.qa.

2.3.3 Major Players and Companies

Qatar's Ministry of Public Health (www.moph.gov.qa/home-en) regulates Qatar's public healthcare. Its key functions are to create a clear vision for the nation's health direction and to guarantee the quality of public healthcare. It supervises the quality and effectiveness of services delivered by primary care, hospitals and other public and private sector health service providers.

National Health Strategy (NHS) (www.nhsq.info) is a comprehensive program of reforms for 2011-2016, aligned to the Qatar National Vision 2030 that will advance Qatar's Healthcare Vision of creating a world-class, patient-centred healthcare system.

The Hamad Medical Corporation (www.hmc.org.qa), is the state healthcare provider that delivers around 95 per cent of healthcare in Qatar. Service is free of charge. Currently in development is the Hamad Medical City that aims to uplift the service level and meet the increasing demand for healthcare.

2.3.4 Market Access / Foreign Investment

Qatar is considered a new country that is building its cities based on knowledge and innovation. New ideas, creativity and innovative products are welcomed, especially if they prove to be economically viable or have a high contribution in values of sustainability and people's welfare.

A challenge that companies face is that several political and cultural factors affect the decision-making, not just the quality of the product. This may create an ambiguous atmosphere when tendering for or announcing projects. Moreover, having a local partner is a major motive for authorities to consider foreign companies for certain projects.

2.3.5 Legislation (tenders, certification)

Changes to the law in Qatar now allow foreign companies to invest in the healthcare sector without the need for a local partner.

2.3.6 Market trends

Qatar's healthcare expenditure as a percentage of GDP is lower than the GCC average; however, it has the highest per capita health spending in the region. The government also faces a healthcare challenge in Qatar's ageing population. Due to the improvement of life expectancy a larger number of elderly people requiring care can be seen creating further pressure on the demand for specialised healthcare.

2.4 Bahrain

Bahrain has a well-developed and modern healthcare system. All Bahraini citizens have free access to all healthcare services through good public systems, although most citizens prefer private institutions. Much like other Gulf-countries the government is the main provider of healthcare in Bahrain. Additionally, Bahrain has followed its neighbours' exclusion of non-nationals from the public healthcare system, causing insurance rates for expats to go up, and making health care a luxury for foreigners.

QUICK FACTS: BAHRAIN HEALTHCARE MARKET

Bahrain	2005	2010	2015
Population (million)	0.87	1.26	1.4
GDP (billion USD)	16	26	32
Healthcare spent (%GDP)	3.2%	3.6%	4.9%

The rise of expenditure mostly stem from the government's increased efforts in providing the necessary medical infrastructure to the country's residents as well as a growth in population with an increase in expatriates, which has led to a concurrent rise in the need for more private medical facilities.

There are over 20 hospitals in Bahrain, one third of them are private, the rest are public hospitals, as well as almost 30 government-owned healthcare centres. Like other countries in the region, expatriates constitute a significant proportion of the workforce in the healthcare sector.

2.4.1 Main Strategic Government Agenda

Bahrain strives to be a leading centre for modern medicine, offering high-quality and financially sustainable health care in the region²³. A good example of this is the dedicated medical centre for sickle cell patients that was opened at the Salmaniya Medical Complex in February 2014. The BHD4.7mn facility - the first and largest of its kind in the region - will cater to more than 15,000 patients - including around 5,000 sickle cell anaemia sufferers.

Bahrain's ambition is to create an insurance fund for local as well as expatriate patient who will have the choice of public and private healthcare providers that meet international standards for health-care provision³.

2.4.2 Opportunities, Investments, Developments

The future opportunities in Bahrain are threefold: IT development, intensive investments in medical infrastructure and the establishment of a 'National Health Insurance Scheme'.

If Bahrain wants to continue to improve health care, an increase in health-related IT is of paramount importance. Bahrain has realized this and is seeking companies, or even countries, that are willing to cooperate in this field. A good example of this, is Bahrain's attempt to work together with the Indian state of Kerala, where exchange programs for medical and IT students have been set up.

The infrastructural investments largely to the building of brand new, top-of-the-line medical centres, educational establishment such as the Royal College of Surgeons in Ireland (RCSI) and hospitals which can compete with the best centres internationally.

Bahrain is also planning to introduce mandatory health insurance for the entire population. The Government of Bahrain has worked with the World Bank to establish universal health coverage with a social insurance type scheme for Bahraini nationals and private insurance for ex-pats²⁴.

2.4.3 Major Players and Companies

Even though one of the government's aim is to introduce and support the private health sector, the government funding still makes up for over 70% of the total healthcare funding. The major player remains the **Ministry of Health** (<http://www.moh.gov.bh>) which plays an important role when it comes to healthcare provision, as well as education and even procurement.

The National Health Regulatory Authority (NHRA, <http://www.nhra.bh/>) is responsible for regulating health service provision across both the public and private sectors in Bahrain, including licensing of healthcare professionals, healthcare facilities and the control of medicines and drugs.

2.4.4 Market Access / Foreign Investment

In line with Bahrain's overall goals, the local healthcare sector seeks only high quality products and services. This represents a golden opportunity for Dutch companies since Dutch products, services and education are highly regarded.

2.4.5 Legislation (tenders, certification)

Bahrain welcomes and promotes investment in most business sectors without restriction. Foreign investment and 100% foreign ownership is also permitted in general, with a limited number of business activities that are reserved by law for Bahraini and GCC citizens and companies only. However, health and medical investments are not part of this, making Bahrain an excellent point of entry into the GCC.

2.4.6 Market trends

Healthcare demand is rapidly rising in Bahrain due to the country's growing, ageing population and a higher prevalence of chronic diseases. Consequently, the pressure on Bahrain's healthcare system will rise, causing it to remain largely government funded. This growth will provide revenue generating opportunities for foreign investors and partners in both the healthcare sector, as well as the life sciences sector.

2.4 Kuwait

Like other countries in the region Kuwait has witnessed a rapid growth in population as well as healthcare expenditure and provision. Kuwait's latest five-year Economic Development Plan prioritizes healthcare and further investments are required. During the coming years, opportunities for private and foreign investors will grow significantly.

Kuwait's income still heavily relies on oil incomes; petroleum accounts for over half of the GDP, 94% of export revenues, and 90% of government income. Almost 90% of all healthcare funding is provided by the Kuwaiti government. Around 4 million people are living in Kuwait, roughly 30% of them are Kuwaitis, whilst expatriates account for 70% of the population⁴.

QUICK FACTS: KUWAIT HEALTHCARE MARKET

Kuwait	2005	2010	2015
Population (million)	2.3	3.1	3.9
GDP (billion USD)	81	115	113
Healthcare spent (%GDP)	2.2%	2.8%	3%

2.5.1 Main Strategic Government Agenda

One of the main objectives of the Kuwaiti government is to achieve high quality health care. It has focused its plans on the establishment of new centers for primary health care, dental clinics and universal health coverage of amongst the population.

In recent years, several reforms were implemented by the Kuwaiti government⁴, aimed at effectively funding the healthcare sector including Public Private Partnerships (PPP). The Ministry of Health is particularly seeking private sector involvement in the non-emergency healthcare area for expatriates. To do so, the Kuwaiti government has launched a PPP company, Kuwait Health Assurance Company, aimed at privatizing expatriate medical care and health insurance.

2.5.2 Opportunities, Investments, Developments

The public health system of Kuwait is divided into six 'Health regions', each region with a general hospital and several polyclinics. The government of Kuwait operates 15 general and specialized hospitals. The country has a well-established primary care network (polyclinics), a local clinic in every district. The secondary care is provided by the six major hospitals: Sabah Hospital, Amiri Hospital, Adan Hospital, Farwaniya Hospital, Mubarak Al-Kabeer Hospital and Jahra Hospital. These major hospitals include a health centre, specialized clinics and dispensaries. It is projected that 19 new government polyclinics will open in the next two years. Non-resident patients may visit any of these public clinics, whereas residents may only visit the public clinics located at their neighborhood of residence.

Currently there are 20 large-scale mega healthcare projects planned in Kuwait, worth 3.5 billion KD. The projects will result in approximate 11,200 additional hospital beds. To meet the public demand, the government plans to expand public healthcare provisions, which includes the building of advanced new hospitals and specialist medical centers. Developing specialist care for chronic conditions and better preventive care are priorities too, while securing universal coverage for the large expatriate workforce is a long-term goal. To lead the policy development, licensing, quality assurance and overseas healthcare functions in Kuwait, there is a strong need to create an independent healthcare regulatory authority.

Out of the 10 major construction projects in Kuwait for the coming years, worth 12 billion USD, 6 take place within the healthcare sector. The healthcare investments are one of the major drivers of the construction industry's growth. The building of several hospitals is scheduled or has already started. There are eight major expansion projects taking place. For an overview of some of these projects please check the last part of this brochure at "relevant healthcare projects" or contact the Dutch Embassy in Kuwait for more detailed information.

Kuwaitis and expatriates are both covered by a universal health scheme, with more extensive coverage for the Kuwaiti nationals. The Kuwaiti nationals have free healthcare, services and drugs on the 'circular 365' list. In contrast, all expatriates have to pay fees for non-emergency health services and state-subsidized drugs from a limited list. Most expatriates have private healthcare cover, as they only receive limited support from the government. Expatriates mostly purchase medicine from the private sector, because it gives them access to drugs not available in the public sector. Kuwaiti nationals also use the private sector to avoid the crowded public facilities or to obtain drugs with limited availability.

2.5.3 Major Players and Companies

The Ministry of Health (MOH, www.moh.gov.kw) is the sole regulator and the largest provider of healthcare facilities in the country. MOH is the owner, operator, regulator, and financier of the majority of healthcare services rendered, pharmaceuticals purchased, and medical equipment acquired in the country. Several other public and semi-public institutions such as the military and the Kuwait National Petroleum Company independently operate healthcare systems for their employees. As mentioned before, Kuwait also has many private hospitals and healthcare groups, which offer private accommodation, suites, minimal waiting times, and wellness services, unlike public hospitals.

2.5.4 Market Access / Foreign Investment

The Kuwaiti government supports private sector involvement in the development of the health system, thus creating opportunities for foreign investments. The new PPP Law and the implementation of its regulations are a positive step for Kuwaiti PPPs. The new law will provide the foundation for a more investor-friendly and streamlined PPP landscape to flourish in Kuwait.

2.5.5 Legislation (tenders, certification)

Rules and regulations set by the Ministry of Health (MOH) may be subject to frequent change and it is not possible for foreign firms to enter the Kuwait market without a Kuwaiti partnership or agent. To participate in any tender the company needs a letter of guarantee, issued by the Kuwaiti bank, which is only possible for Kuwaiti companies. Besides the rules and regulations for companies to work in the healthcare sector, the regulations for specific medical products can differ depending on what kind of product the company wants to export to Kuwait.

2.5.6 Market trends

Kuwait's growing population, robust economy, significant public investment and changing health care needs will drive and shape demand in the sector in coming years. With new PPP legislation and a growing focus on the private sector, it is expected that this sector will grow rapidly and more cooperation between the government and private entities is expected.

2.4 Sultanate of Oman

Over the last 45 years, Oman has deployed a series of five-year healthcare investment and development plans that have consistently shifted the benchmark of healthcare in the Sultanate²⁵. Since 1970, Oman has grown from having just two public hospitals to fifty public hospitals as well as ten private hospitals today. Public health concerns have moved from the prevalence and prevention of diseases such as malaria, to a focus on lifestyle related diseases such as diabetes and heart problems. In less than 50 years, the life expectancy of the average Omani has moved from 47 years of age to 76 years; a staggering feat by any measure.

Today, the Ministry of Health, Oman's highest health authority, remains committed to achieving long term goals through a series of five year plans. As such, the Ministry has defined a vision for healthcare in 2050 that acts as a blueprint for future investment and development undertakings.

QUICK FACTS: OMAN'S HEALTHCARE MARKET

Oman	2005	2010	2015
Population (million)	2.6	2.7	3.5
GDP (billion USD)	31	59	70
Healthcare spent (%GDP)	2.5%	2.9%	4.5%

2.6.1 Main Strategic Government Agenda

With the Omani population growing at a rate of 4% annually, and recently surpassing the 4 million people mark, the demand for new facilities is at an unprecedented high. This demand is acting as incentive for the government to further open the sector for international investment²⁶. In total, government spending accounts for 78.7% of total health expenditure. Ultimately, the Omani government invests heavily in the health sector and is expected to do so in the coming years leading to the long-term Vision of the Ministry of Health.

2.6.2 Opportunities, Investments, Developments

The global demand for healthcare is increasing at a rapid rate; and Oman is no exception. Securing a healthy future for the people of Oman requires great efforts on the part of both private and governmental bodies. Accessible healthcare of the highest quality is crucial, and must be met with an affordable and effective public-private healthcare system. Despite the system still comprising of a predominantly public structure, there are ongoing efforts to push for a more integrated private involvement. Private healthcare institutions are encouraged to take more initiative in the market, especially at an affordable rate.

Addressing the rising issues associated with shifting demographics and the introduction of lifestyle related diseases is now on the fore-front of the Ministry of Health's agenda³. Not only is the demand for the treatment of these diseases growing, but a better awareness of the importance of adopting a healthy lifestyle is also necessary.

Due to the monopolized structure of the Omani pharmaceutical market it can occur that medicines fall short of demand. Inderal, Salazopyrin and Pentasa are given here as examples. As such, there is a need and market opportunity for new suppliers to enter the market.

2.6.3 Major Players and Companies

The Ministry of Health (MOH, www.moh.gov.om) is the main health care provider and is responsible for setting health policies and plans and monitoring their implementations. Other health care providers in the country include:

- Armed Forces Medical Services (AFMS),
- Royal Oman Police Medical Services (ROPMS),
- Sultan Qaboos University Hospital (SQUH),
- Diwan Medical Services (Diwan MS),
- Petroleum Development Oman Medical Services (PDOMS)
- Private Sector

Each of the 11 governorates includes at least one hospital extending both secondary and tertiary services. In addition, with every concentration of one thousand citizens, a small public clinic is available. The aim is to ensure that healthcare is extendable and reachable to all citizens in Oman, notwithstanding their location. Although the government provides free health care to all Omani citizens, the shortage in medical staff and facilities places an important role on the private health sector.

2.6.4 Market Access / Foreign Investment

The Sultanate of Oman's approach to healthcare is still orientated towards government owned and operated facilities. However, the role and capacity of the private sector is growing. Oman's 2050 Health Vision document aims to establish a well-organized, efficient, and accountable healthcare system. Based on the analysis from Alpen Capital⁵, the Sultanate will require an additional 5,740 doctors and 12,863 nurses by 2020. The country is also constructing two major medical cities (Sultan Qaboos Medical City and International Medical City Salalah) at a total cost of US\$ 2.5 billion.

2.6.5 Legislation (tenders, certification)

When it comes to business dealings, Oman is a relatively open and transparent government with a well-structured procurement process.

2.6.6 Market trends

Population growth, aging population and lifestyle diseases have also influenced the Sultanate of Oman. It appears that both the private and public sector will continue to grow with a strong emphasis on innovation and education.

3 OPPORTUNITIES AND CHALLENGES FOR DUTCH BUSINESSES IN THE GCC REGION

3.1 Opportunities and challenges for Dutch businesses in the GCC Region

Specific areas of opportunity for foreign companies in the GCC healthcare industry include diverse areas such as medical education and training, healthcare information technology, medical technology and pharmaceutical solutions focused particularly on treating diabetes and other chronic non-communicable diseases, healthcare consulting and advice, recruitment, and healthcare insurance.

GCC countries depend largely on governments to finance healthcare investments. The average governments' share in GCC healthcare spending is on around 76 per cent⁶. With fluctuating oil prices, governments have realised a sustainable healthcare financing model cannot be overly dependent on state budgets. Hence GCC governments has gradually started to encourage private sector investments. Most GCC Governments continue to sponsor international patient care for their citizens the WHO have estimated that around 25% of the entire UAE healthcare budget is spent on the treatment of UAE patients abroad⁷. This means that around USD 10 billion is spent annually for the medical treatment GCC citizens receive abroad. The leading destinations at present are UK, USA, France, Germany and Thailand¹⁹.

At present, foreign direct investment in the GCC region focuses mainly on areas such as healthcare delivery and establishing local offices, as well as joint ventures in the areas of pharmaceutical and medical technologies. The primary objective of investing in the pharmaceutical and medical technology segments is to increase reach and market access. Sensing opportunity in the pharmaceutical segment, many multinational companies have enhanced their presence in the region through joint ventures.

A strong local market within the GCC countries, along with the possibility of exports to nearby countries, makes the pharmaceutical segment an attractive investment opportunity. However, the segment is in an evolving stage and in the short to mid-term will face challenges like ability to attract qualified manpower, tying up for technology, and sourcing of raw materials.

The Netherlands has a strong tradition of R&D in healthcare, integrating ICT solutions in healthcare and innovative solutions for diagnostics and treatment. Dutch expertise lies in preventative medicine and long term care and rehabilitation. Due to the cost structure in the Netherlands there exists a longstanding and strong experience in minimizing hospital stay, which might prove relevant to the development of the sector in the GCC region.

With current digital healthcare technologies and new technologies under development, the GCC governments are increasingly realising the advantage of this approach in reducing healthcare cost and improving quality of services. Online medical consultation and self-diagnosis are some of the other benefits of digital technologies. Moreover, online pharmacy services reduce the time taken to deliver medicines. The market for e-health services, which is growing at a CAGR of 12-16 per cent, is expected to reach USD 160 billion by 2015.

The GCC region is highly dependent on foreign medical professionals. Increasing the capacity of medical colleges and attracting local youth to pursue a career in medicine would be key steps the governments could take in order to help build a larger pool of local physicians and cater to the ever-growing demand. Opportunities rise for Dutch companies in recruiting and training a local workforce.

3.2 Support by the Dutch government

The Netherlands government network in the Gulf Region offers several services that can help you prepare and establish your business. These services focus on providing market information, identifying potential partners and advising you in setting up a business in the GCC.

TRADE REQUESTS

Do you have a trade request about doing business in the GCC? The embassies and consulate general are more than happy to assist you. Besides offering concrete answers to your questions relating exporting and investing abroad, we can also assist you in efforts to discover potential market opportunities.

BUSINESS PARTNER SCAN AND MATCHMAKING

A business partner scan gives you an overview of potential business partners in your target market. These partners can be agents or distributors, but also manufacturing partners. The network looks for parties that meet your specified criteria and are interested to work with you. Further information on: www.rvo.nl/onderwerpen/hoi/netwerkpartners-zoeken/internationale-zakenpartners/zakenpartnerscan (in Dutch).

The embassies and consulate general can run a company check at the request of Dutch companies about a potential business partner. The check verifies if the company is legally registered with a local authority.

TRADE MISSIONS AND DELEGATIONS

Trade missions, delegations and joint submissions for exhibitions are organised from the Netherlands to the Gulf Region. In the Gulf region, several trade fairs take place that can be of great interest to Dutch businesses. The embassies and the consulate general can provide you with the right information, advise you in participating and help you to meet potential local partners.

TRADE DISPUTES

Trade disputes range from differences in interpretation of contracts and agreements, to liability for breach of local regulations and requirements. The embassies and the consulate general can provide a list of local attorneys who may be able to assist you in the process.

OTHER SERVICES

- Access to the broad network of the embassies and the consulate general
- Introduction to contacts at different levels
- Advice on lawyers and accountants
- Advice on the Orange Carpet visa procedure
- Holland promotion and marketing opportunities
- Access to trade missions

SUPPORT TOOLS

The embassies and consulate general work closely together with organisations and ministries in the Netherlands. For example, RVO has several tools to support Dutch companies with ambitions to grow their business abroad, both starting and seasoned entrepreneurs.

4 EVENTS, USEFUL LINKS, RELEVANT HEALTHCARE PROJECTS

EVENTS

- **Saudi Health, International Healthcare Hospital Suppliers and Medical Equipment Show, Riyadh**, (www.saudihealthexhibition.com), the largest healthcare event in Saudi Arabia.
- **Abu Dhabi Medical Congress** (www.abudhabimed.com), the fastest-growing healthcare event in the region, running five vertical shows: Dentistry, Emergency, Primary Healthcare, Patient Safety and Rehabilitation.
- **Middle East Patient Safety and Quality Congress** (<https://menapatientssafety.meed.com/>) (, a global event, co-sponsored by the Health Authority Abu Dhabi, in which over healthcare, government, and corporate leaders come together to define objectives and frame solutions to the challenges of healthcare reform, cost, quality and delivery.
- **Arab Health Exhibition, Dubai** (www.arabhealthonline.com), annually organised in January, Arab Health is the largest healthcare exhibition in the Middle East and the second largest in the world. Arab Health is viewed as a must-attend global event on the healthcare calendar.
- **Hospital Build & Infrastructure Middle East, Dubai** (www.hospitalbuild-me.com), organised annually in June, is the fastest-growing, global business-to-business platform dedicated to bringing together investors, commissioners backers and managers of healthcare-related building projects with key players in planning, design, construction, operations, management, supply and refurbishment.
- **QMED, Qatar International Medical Devices & Healthcare Exhibition and Conferences, Doha, Qatar**, (www.qmedexpo.com), is the main healthcare event in Qatar and showcases services, technologies, and equipment related to the medical and pharmaceutical industry.
- **Health Insurance Forum, Dubai** (<http://www.healthcareinsuranceforumme.com>). An annual, international conference aimed at policy makers, health insurance companies and providers.

USEFUL LINKS

- Health Minister's Council of GCC states: www.sgh.org.sa
- Hospitals in Saudi Arabia: www.moh.gov.sa/en/Sectors/Hospitals/Pages/default.aspx
- Hospitals in Abu Dhabi, UAE: www.haad.ae/statistics
- Hospitals in Dubai, UAE: <https://www.dha.gov.ae> and <http://www.dhcc.ae/>
- Hospitals in the rest of the UAE: <http://www.moh.gov.ae/en>
- Hospitals in Qatar: www.lifeinqatar.com/en/listing-category/healthcare/hospitals-in-qatar
- Hospitals in Oman: https://www.moh.gov.om/en_US/referral-hospitals
- Hospitals in Bahrain: <http://www.moh.gov.bh/HealthInstitution/HealthCenters>
- Hospitals in Kuwait: <http://www.visit-kuwait.com/info/hospitals-medical-centers.aspx>

RELEVANT HEALTHCARE PROJECTS

- Cleveland Clinic Abu Dhabi (UAE) – one of Abu Dhabi's flagship healthcare projects. The facility is on al Maryah Island, with a bed capacity up to 490, operating five different specialist institutes covering digestive disease, eye, heart and vascular disorders, neurological treatment, and respiratory and critical care.
- Sheikh Shakhbut Medical City (The New Al Mafraq Hospital) (UAE) – a new hospital built to replace the current Al Mafraq Hospital. Total capacity of 732 beds, multispecialty, including trauma, burns, orthopedic, maternity and pediatric departments. Part of SEHA, the Abu Dhabi Health Services Company.
- Al Ain Hospital (UAE) – a new hospital being built in the city of Al Ain, by SEHA, with a total value of USD 1.2 billion and bed capacity of 690.
- Burjeel Medical City (UAE) – owned and operated by VPS Healthcare, scheduled to open in 2018.
- Al Jalila Hospital, Dubai (UAE) – is a smart children's specialty hospital, opened in 2016.
- Rashid Hospital (UAE) – undergoes a revamp of the existing facility completed in 2016 (capacity of 786 beds). (DHA project).
- New East Jeddah Hospital (KSA) – to be completed in 2018, 1,000 bed hospital
- Diaverum (KSA) – Swedish company specializing in renal care has opened over 20 clinics in Saudi, in partnership with Saudi Ministry of Health.
- King Abdullah Bin Abdulaziz Project (KSA) – Two Medical Complexes currently being developed in Riyadh and Jeddah.
- King Faisal Medical City for Southern Regions (KSA) – large medical city in Abha, including 500-bed main hospital
- Sultan Qaboos Medical City (Oman) – large medical city, 5 hospitals. Paving the way for a new era of medical excellence in the country.
- International Medical City Salalah (Oman) – large project under development by Apex Medical Group. The plan is to build a healthcare resort with 530 bed healthcare with educational facilities
- Mohammed Bin Khalifa Al Khalifa Cardiac Center (Bahrain) – 148 bed hospital, due to open in 2018. Kuwait Cancer Centre (Kuwait) set to become one of the largest cancer treatment centres in the world
- New al Sabah Hospital (Kuwait) a 731 bed hospital scheduled to open in 2018.
- New Farwaniya Hospital (Kuwait) a 955 bed hospital and dental center, due to open in 2019.
- Extension al Adan Hospital (Kuwait) to provide new maternity, pediatric, surgical and psychotherapeutic facilities.
- Qatar Health Facilities Master Plan (QHFMP). Qatar aims to build 48 new healthcare facilities by 2020, with around 20 projects already completed.

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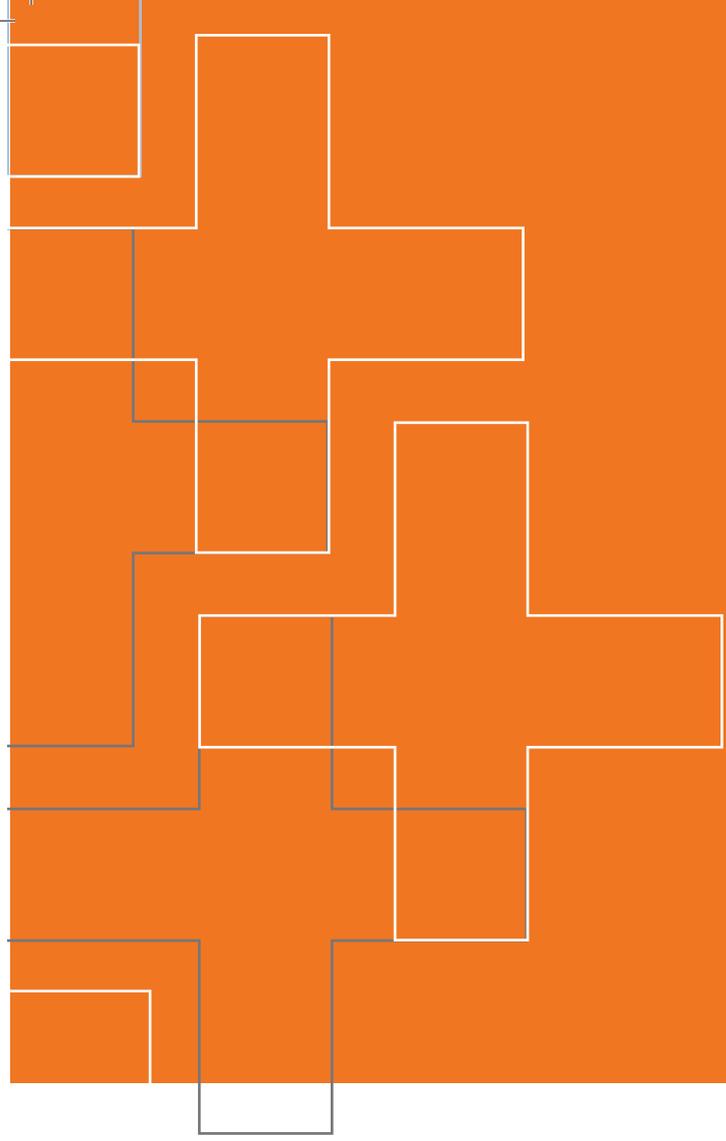
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