

Dubai Health Investment Guide

2023



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



“Improving healthcare and education services in the UAE will not stop as they are a priority for the lives of the people, and will receive our utmost attention. Quality and innovation should be cornerstones in healthcare and education systems and we want them to be the top systems globally that will ensure happiness for all.”

His Highness Sheikh Mohammed bin Rashid Al Maktoum

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



“The advanced level of medical services offered, the skilled medical professionals and cutting-edge healthcare facilities have enabled Dubai to emerge as a prominent healthcare destination.”

His Highness Sheikh Hamdan bin Mohammed bin Rashid Al Maktoum

Crown Prince of Dubai and Chairman of the Dubai Executive Council



“The public and private sectors have tremendous potential, and their integration strengthens our leadership.”

Sheikh Maktoum bin Mohammed bin Rashid Al Maktoum

Deputy Ruler of Dubai, Deputy Prime Minister and Minister of Finance

FOREWORD

Dubai is an investment-friendly Emirate that supports and guides investors every step of the way so that they can add to the dynamism of the city and be a part of the growth journey that this city offers.



Dubai is one of the fastest growing cities in the world; it is a land of opportunity and offers a business driven environment.

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 and as per the directives of His Highness Sheikh Hamdan bin Mohammad bin Rashid Al Maktoum, Crown Prince of Dubai and Chairman of the Executive Council, it is our aim to ensure Dubai provides the highest-quality of internationally recognized patient-centered health services.

In order to help us fulfill our vision, we consider the private sector to be our partner in our race towards excellence. Many of the world's largest hospitals and specialized centres have invested in Dubai's healthcare sector and they are continuing to expand their services across Dubai.

This in-depth guide is especially compiled for our investors so that we can support them by providing important information such as specialties in the health sector that require more investment due to their high demand.

The guide also pinpoints the locations most in need for medical services and the types of health services required. The guide also identifies the city's legislations, procedures and available investment incentives and has been developed based on studies that took into account the growing demand for health services in Dubai.

Join us in our ongoing journey of excellence in healthcare so together we can build a robust and dynamic health sector that thrives on quality and patient-centered care.

His Excellency Awadh Al Ketbi

Director General, Dubai Health Authority

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The Dubai Advantage



Dubai's thriving business ecosystem, strategic plans, government initiatives along with the high-end quality of life have attracted a huge population to live and work in the Emirate. The Dubai Advantage positions it as a smart and sustainable city of the future, as the main gateway to regional growth markets, and as a pivotal hub in the global economy. These factors allow the city to act as a magnet for Multinational companies to establish their regional headquarters in the Emirate.

Dubai the CITY of the future

- A vibrant city with a dynamic, open and can-do mindset, delivering an unrivalled vision of the future.
- A city of opportunity for professionals, investors and entrepreneurs as well as global blue chip organizations.

Dubai the GATEWAY to growth markets

- Strategically located between Europe, Africa and Asia.
- Future-ready infrastructure and logistics that are constantly being expanded, benefitting the economy and businesses.

Dubai the Global business HUB

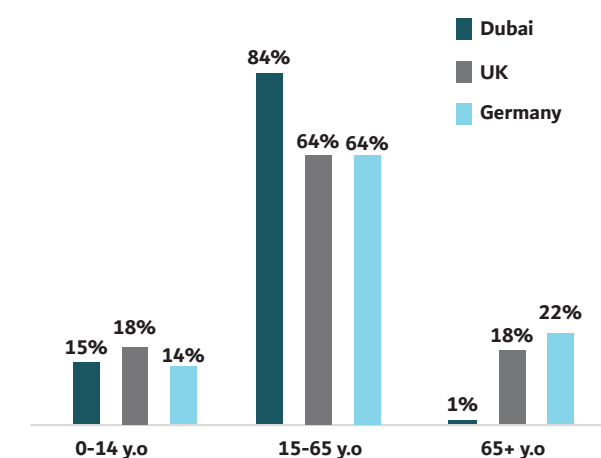
- A world class global hub that is cutting edge, connected and a key centre for international investment.
- Unrivalled and well-recognised quality of life and ability to retain talent.



Dubai the CITY

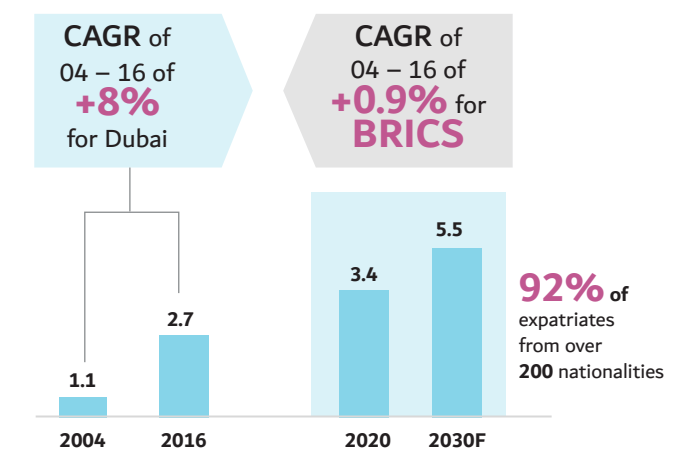
Dubai is home to an international and prosperous population that is living in a stable and safe society. Dubai is also a dynamic city with an open and investor-friendly economy. It is one of the world's most connected cities, with future-proofing built into all new projects. Its consistent strategic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

Figure 1: Population breakdown per age range (in percentage, 2020)



Source: Dubai Statistics Center, Office for National Statistics - United Kingdom (2019), Federal, Statistical Office Germany

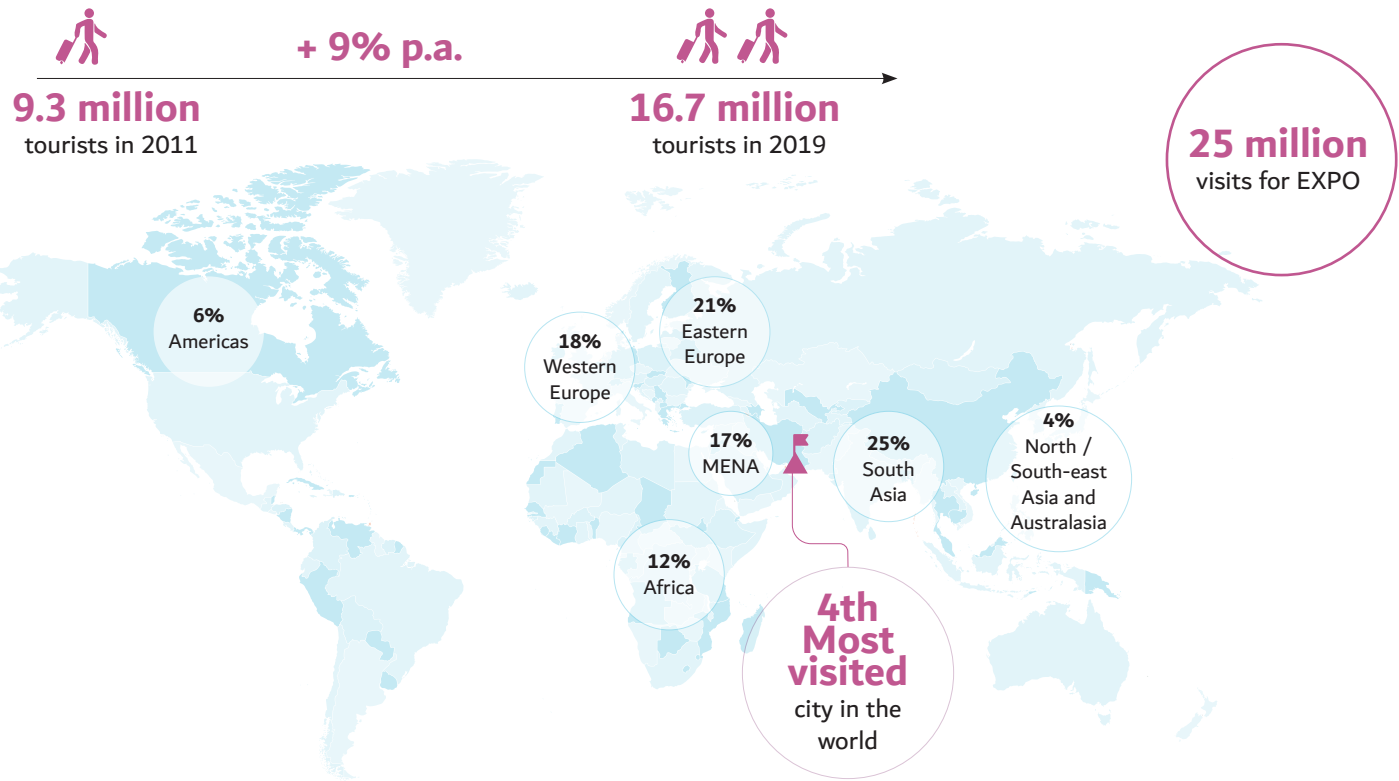
Figure 2: Growth of Dubai's population (in millions of inhabitants, 2004-2030F)



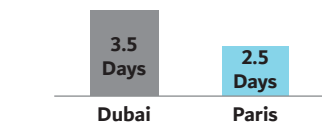
Source: Dubai Statistics Center

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

Figure 3: Key tourism indicators in Dubai



Avg. length of stay (days)



Source: Global Destination Cities Index 2019, Knight Frank Research

Total no of establishments

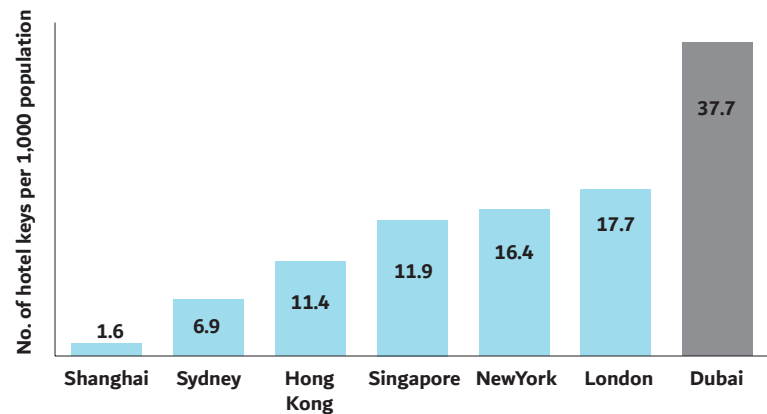


Source: Dubai Tourism

Dubai's top attractions

- BURJ KHALIFA**
World's tallest building
6.19 million visitors per year.
- THE DUBAI MALL**
World's **most visited** destination.
- GLOBAL VILLAGE**
Region's largest and first-ever multi-cultural festival park. **4.5 million** visitors per year.
- DUBAI CREEK**
Historic heart of the City and home to the Dubai Gold Souk, receiving an average of **2 million** visits per year.

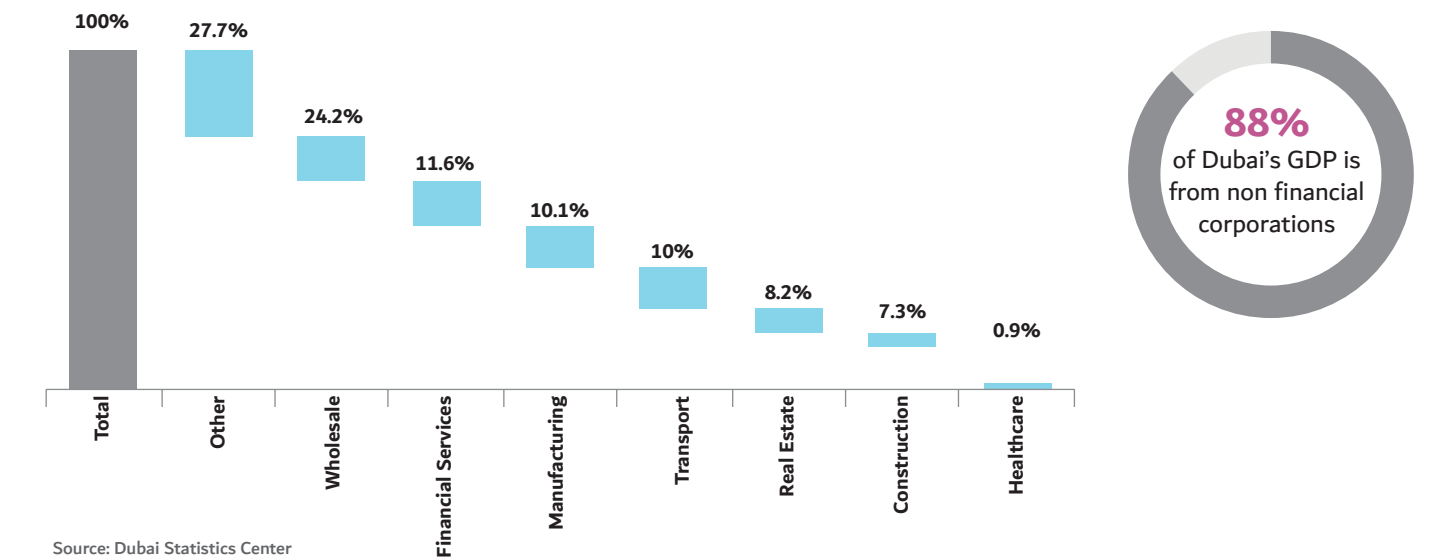
No. of hotel keys per 1,000 population (latest)



Source: Knight Frank Research

Dubai has a diversified economy, the healthcare sector accounts for 0.9% of its GDP

Figure 4: Dubai GDP breakdown, by sector (2020)



Source: Dubai Statistics Center

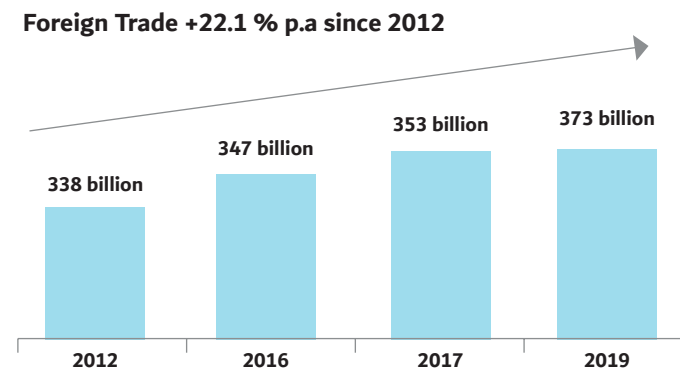
Dubai the GATEWAY

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. It has 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. Furthermore, Dubai is a member of international trading associations such as the WTO and the GAFTA.

Figure 5: Evolution of Dubai's Foreign Trade (2012-2019, in USD)



Source: Dubai Statistics Center

- Ranked 16th globally for ease of doing business.**
- One-third of the world's population** live within **four hours flying time** from Dubai.
- Dubai ranks #1 in the World Bank's logistics performance index** for the MENA region.

Source: World Bank, Dubai Statistics Center

Dubai benefits from quality transport infrastructure



3.6 million tons of airfreight moved through **DXB** and **DWC** in **2018**.



Dubai International Airport (DXB) is the busiest airport globally, when measured by international passenger traffic, welcoming **140 airlines** and connecting **260 destinations**. Through Dubai International Airport (DXB) and Dubai World Central (DWC), **88 million passengers** were received in **2019**.



Jebel Ali port is ranked as the **11th largest world container port** in 2019 by the World Shipping Council, managing an annual volume of 14.1m twenty-foot equivalent units and connecting more than **150 ports** worldwide.

Dubai the HUB

Dubai is one of the world's leading business hubs and is one of the most connected and investment-ready economies. It is the preferred location for the global and regional headquarters of many large corporations and is 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 in the region) and for construction permits (#3), registering property (#10), regulation for protection of minority investors (#13) and for contract enforcement (#9), 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 / 135** countries in the **Global Innovation** Index.

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



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 is named one of the world's **top 15 financial hubs** in Global Financial Centers Index, alongside **London, New York and Hong Kong**.

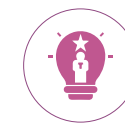
Dubai is a top investment destination worldwide.

The UAE has moved up from 28th position in seven years to become the **9th most globally competitive country**, outperforming Norway, Sweden and Canada, according to the IMD world competitiveness ranking 2021. It is the only Arab country to have maintained its position among the top 10 competitive countries for 4 years in a row. The UAE was ranked 3rd in government efficiency, 4th in economic performance and 7th in business efficiency. In terms of foreign investment, while the UAE was ranked **19th** in the 2020 **Foreign Direct Investment Confidence Index**, in the same year Dubai ranked **3rd city globally** by number of projects and 4th globally in FDI capital flows into greenfield projects, reaching USD 6.7bn.



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

Mercer's 2017 Quality of Living Survey



The UAE ranked **#1 in the MENA region** and **#22/132** countries in its ability to grow, attract and retain talent.

INSEAD's 2020 global talent competitiveness index



UAE is ranked **# 9 worldwide** in HSBC's **preferred countries to live for expatriates**.

HSBC's 2019 Index for preferred destinations



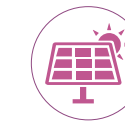
Dubai ranked **#1 city globally** for the number of FDI projects in the healthcare sector in 2021.

FDI Markets

Dubai leads the region in sustainable investment, technology and innovation.



60% nature reserves and rural natural areas in Dubai by 2040.



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



Shams Dubai project, first in region to introduce net-metering for solar power generation (Dubai Electricity and Water Authority). +105% doubling of the green and recreational areas by 2040.



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



Clean Energy Strategy 2050 aims to provide 75% of Dubai's power capacity from clean energy by 2050.



With technology at the forefront, the success of **Smart Dubai** resulted in the launch of **Dubai's first Artificial Intelligence Smart Dubai and Paperless Strategy**.

Healthcare in Dubai



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

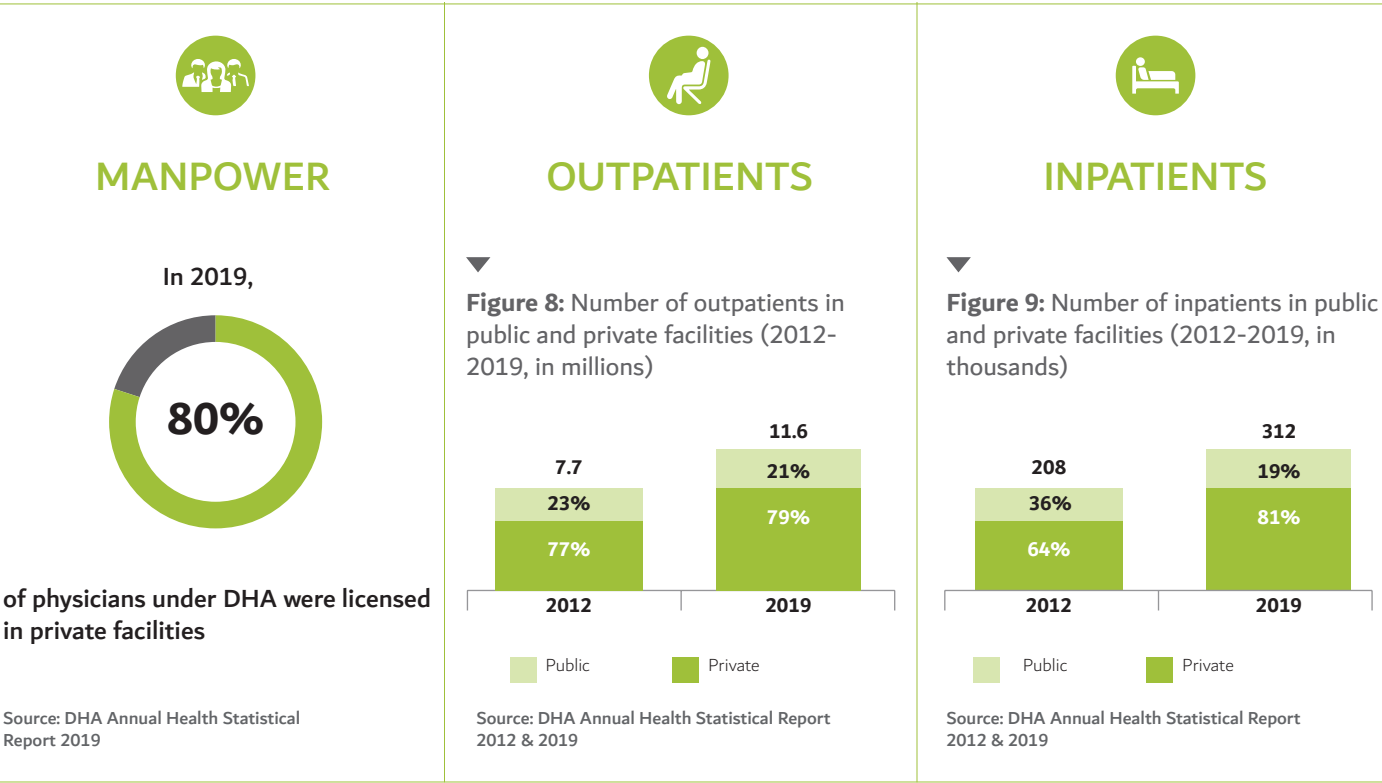
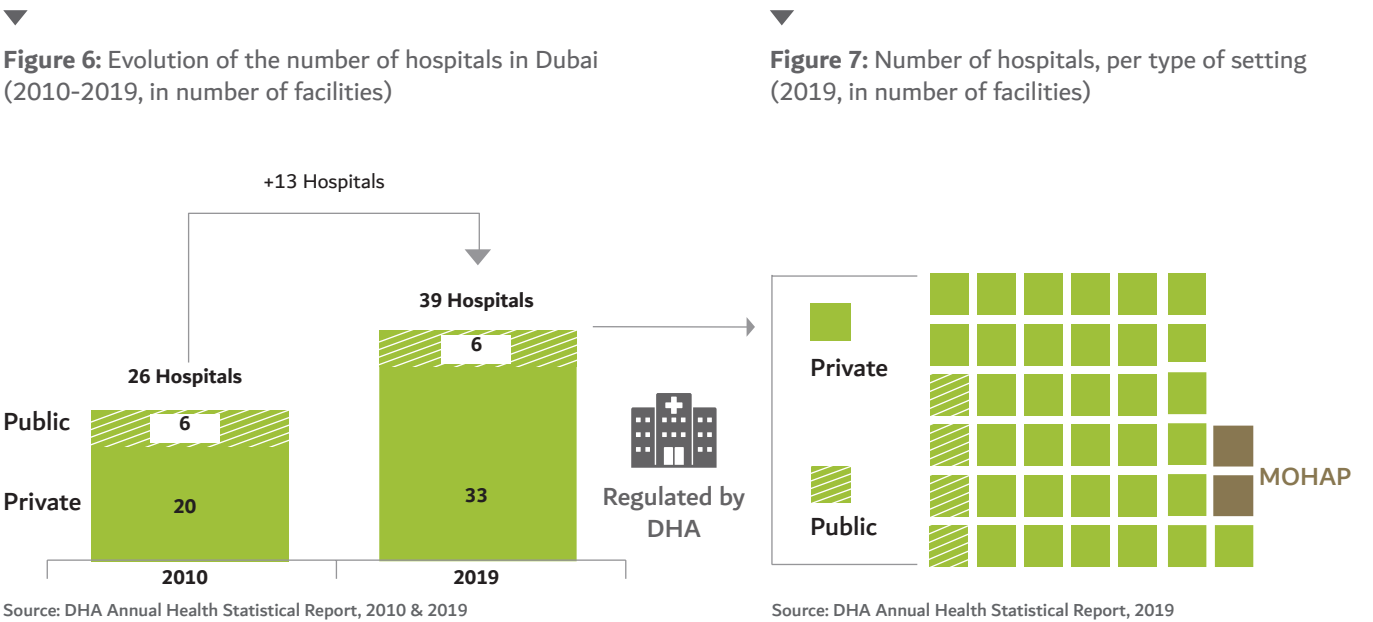
The Dubai Health Authority (DHA) was created in June 2007 by His Highness Sheikh Mohammed bin Rashid Al Maktoum, Vice President and Prime Minister of the UAE, Ruler of Dubai. DHA is the public organisation overseeing the health system in Dubai and its free zones with an expansive vision that includes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

Ministry of Health and Prevention (MOHAP), the federal ministry oversees the UAE healthcare sector. Both Ministry of Health and Prevention (MOHAP) and Dubai Health Authority (DHA) have roles in regulation, licensing, funding, and management of facilities under their oversight.



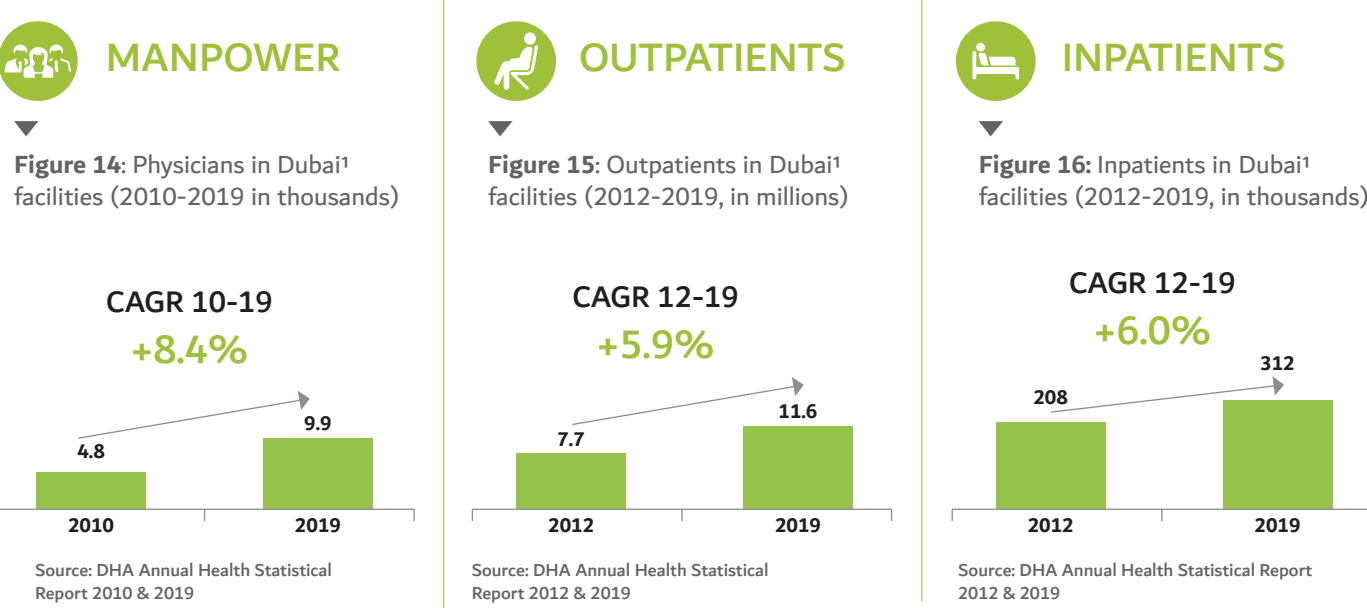
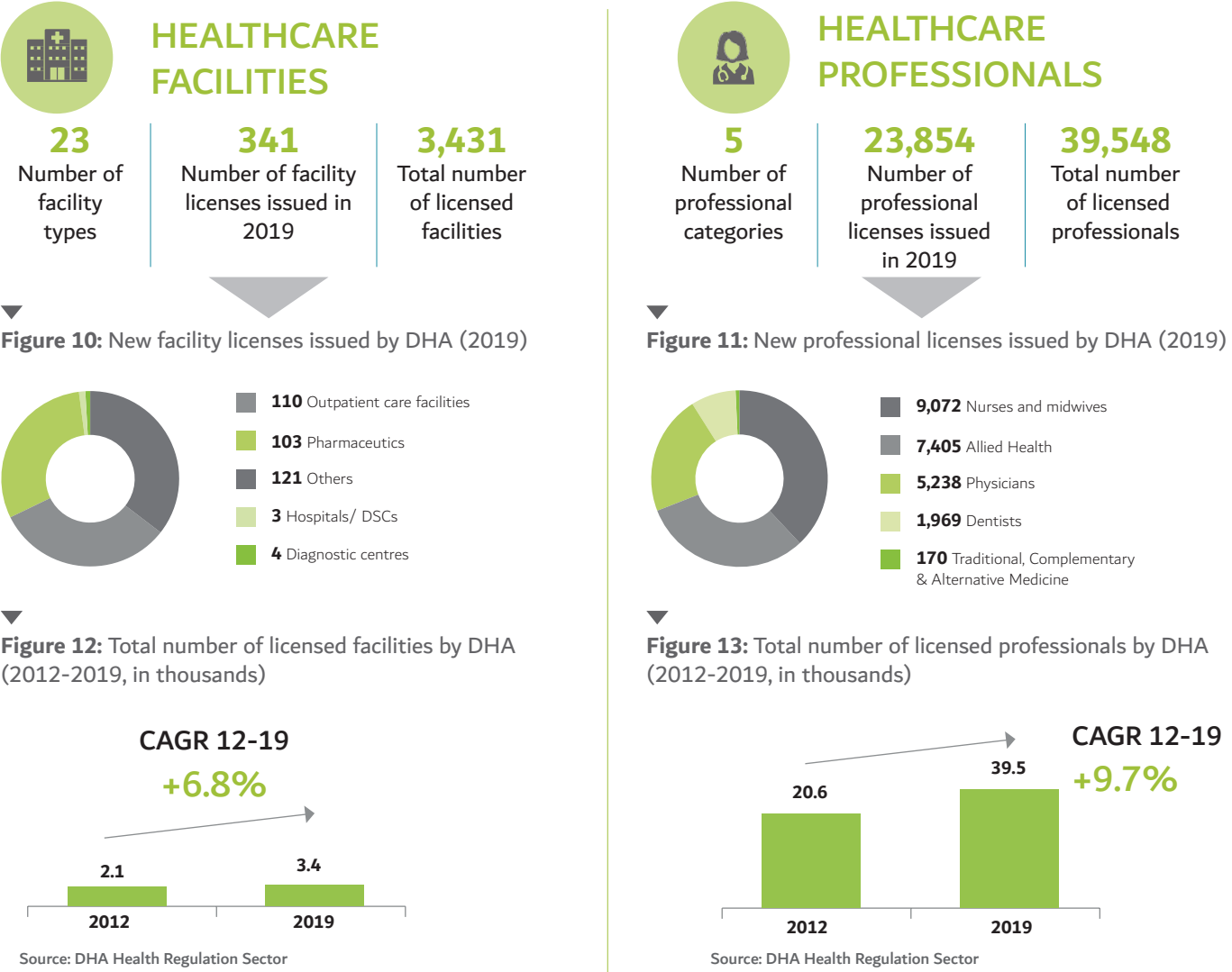
The private sector has spearheaded the development of Dubai’s healthcare infrastructure

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.



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.



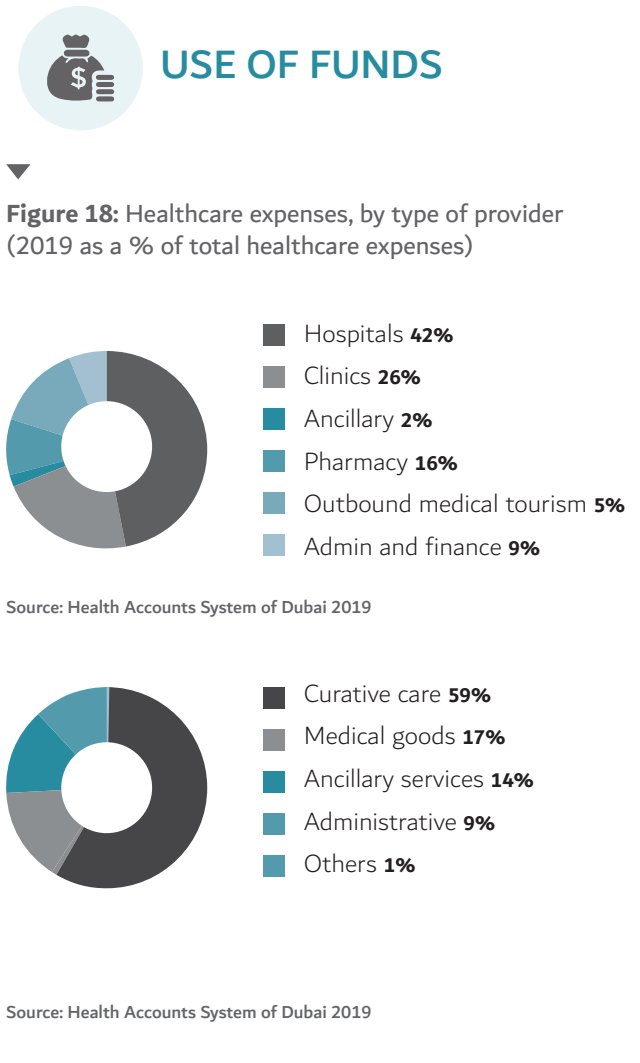
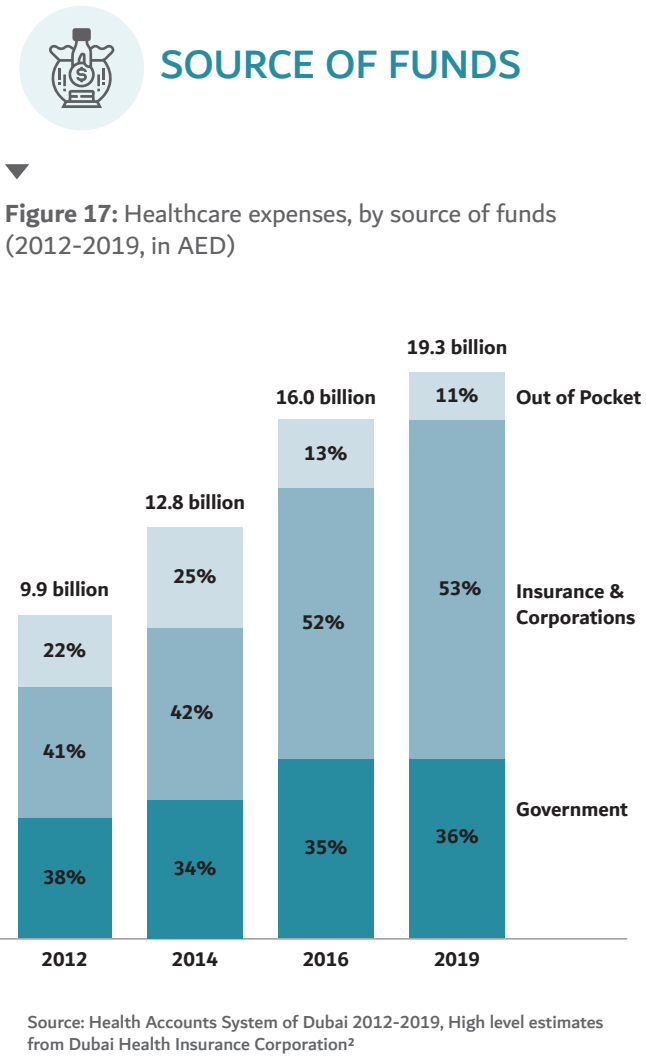
1. Outpatient and Inpatient values include all facilities in Dubai regulated by Dubai Health Authority, and excludes those from Dubai Healthcare City Authority and the Ministry of Health and Prevention

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

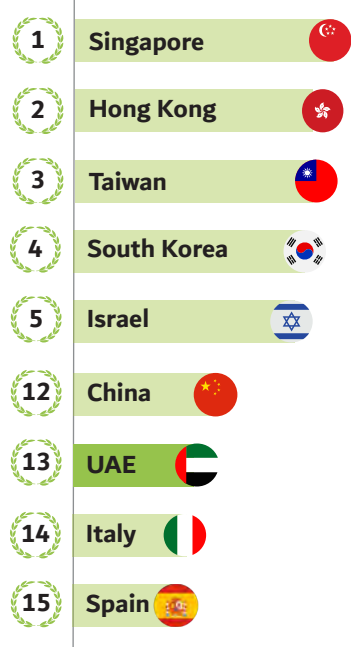
In 2014, a mandatory health insurance law for Dubai was enacted and rolled-out in three main phases, so that by end of 2017 every employee and dependent residing in Dubai was medically insured.



As a result, close to 100% of Dubai's population is now covered by medical insurance. While healthcare expenses reached around AED 19.3 billion in 2019, the share of private insurance has skyrocketed to 64%.



The UAE is one of the top 15 economies with the most efficient healthcare sector, and ranked on top of Middle East countries...

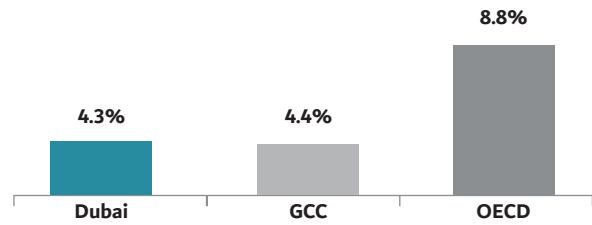


Source: Bloomberg Health-Efficiency Index, 2020

...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.

Figure 19: Healthcare expenditure in Dubai vs. GCC and OECD countries (2017, in % of the GDP)



Source: World Bank, Dubai Statistics Centre - 2017



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:



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 model 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.



Improving the wellbeing of all individuals in Dubai is the underlying driving force for Dubai's far-reaching healthcare strategy that will place the city as a global model in the field of health and generate myriad openings for investors across the sector. DHA strives to provide world-class healthcare services and be at the forefront of health technology by fostering creativity and innovation in alignment with the UAE vision.

His Excellency Awadh Al Ketbi
Director General, Dubai Health Authority

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



INVESTMENTS AND PARTNERSHIPS

Our mission

Promote Dubai as a viable hub for investment in healthcare that addresses the needs of the Emirate and its future opportunities by providing the best service for investors and enabling sustainable public-private models in Dubai



1 **Enhance competitiveness of the health sector** in Dubai through enabling legislation to support investment, through certificate of need policies to optimize capacity and to publish a 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.



The healthcare regulatory infrastructure in Dubai has proven itself to be one of the most advanced in the world making it attractive for global investors. The leaderships forward-vision keeps in focus attracting cutting edge technology and human talent in the medical field.

Dr. Marwan Al Mulla
CEO, Health Regulation Sector, DHA



"Knowledge is Power!," Dubai is working towards being a knowledge based economy and healthcare sector is no different. Dubai Academic Health Corporation is a testimony to how the leadership is focused on taking the healthcare sector forward, by basing it on education, research and innovation. For investors in the healthcare sector seeking to enter an international territory and serve a regional audience, Dubai is ideal as it has the right infrastructure, standards of quality that it follows and transparent regulatory systems that allows the private sector to thrive.

Shehzad Jamal
Partner, Healthcare
Knight Frank

Drivers for Health Investment in Dubai

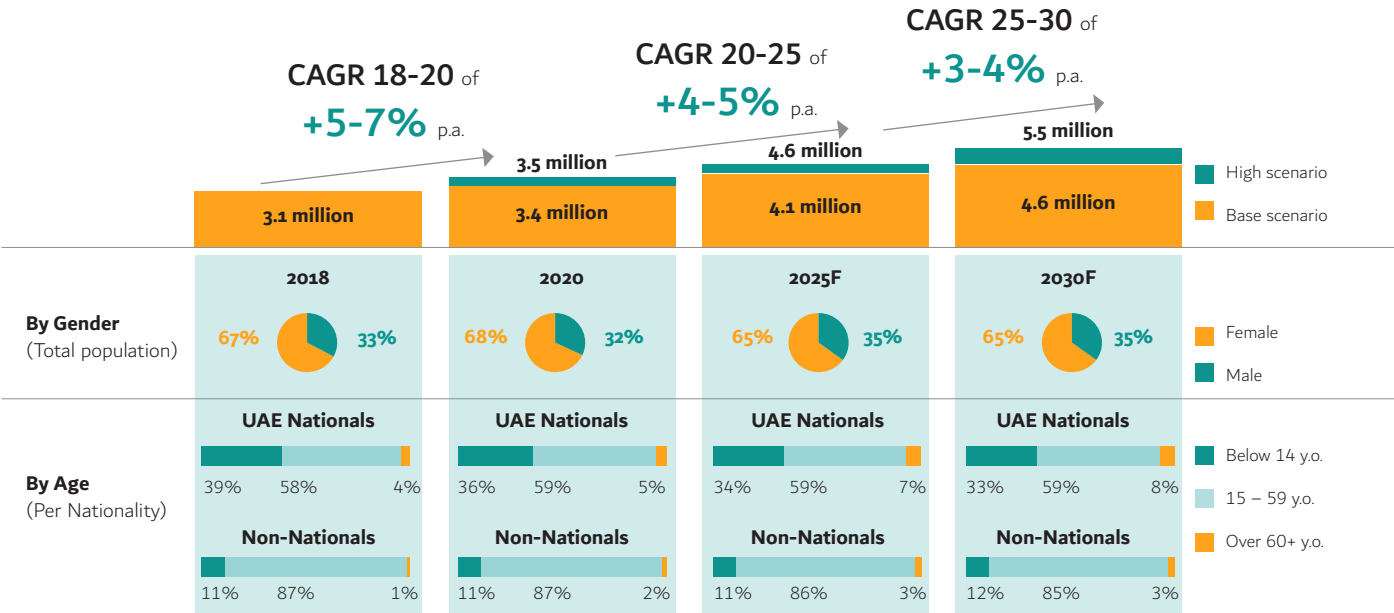


1 A growing population entails a greater need for health services



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

Figure 20: 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**. Between **2018 - 2020** period the growth averaged 5% p.a. and is predicted to grow at a rate of **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 2021, **elderly UAE Nationals (60+ y.o.)** accounted for 7% of **Dubai’s Emirati population** but for **21.7% of SAADA’s expenses**.

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



Dubai Expo 2020 has already welcomed more than **100,000 visitors** for the preview. Between October 2021 to March 2022, the emirate will host **25 million visitors** from **192 countries** around the world.



Major touristic and leisure attractions: **Bluewaters Island** featuring the world’s largest observation wheel and the **Dubai Harbour project** including a cruise ship port. **Dubai Creek Harbor** with the world’s tallest building **Dubai Creek Tower**.



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

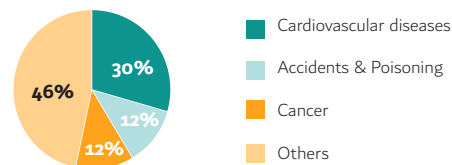


Dubai has invested **\$12 billion** since **2008** to boost capacity at **Dubai International Airport (DXB)** to **90 million passengers annually**, and **Al Maktoum International Airport (DWC)** is expected to handle **240 million passengers annually**.

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

Cardiovascular diseases and Cancer were the **main causes of mortality** in Dubai in 2019, accounting for **over 42%** of deaths.

▼ **Figure 21:** Causes of mortality in Dubai's population (2019¹, in percentage of deaths)



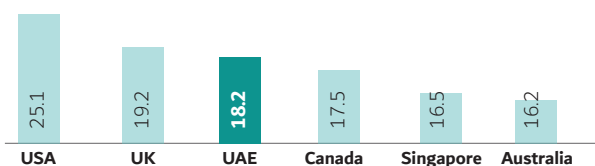
Diabetes is a **critical condition** across the UAE adult population, with a prevalence **ratio 2 to 4 times** higher than in some developed countries.

▼ **Figure 23:** Prevalence ratio of diabetes in population aged 20 to 79 (2019³, in percentage)



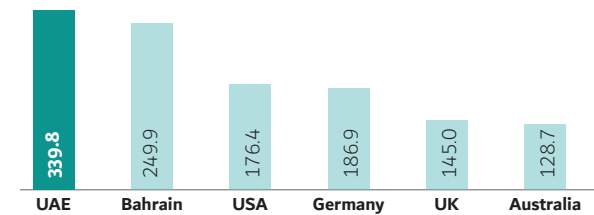
The share of **cigarette smoking adults** reached **28.9%** of the UAE population, at least **6.6 pts more than in** some developed countries.

▼ **Figure 25:** Prevalence ratio of smoking adults (2018, in percentage⁵)



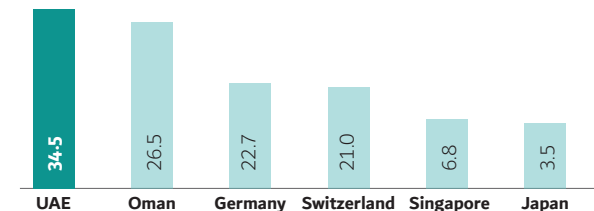
The UAE is amongst the countries with the **highest prevalence of cardiovascular diseases**, up to **3 times higher** than some developed countries.

▼ **Figure 22:** Age standardised mortality rate due to cardiovascular diseases per 100,000 inhabitants (2016², in number of deaths)



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

▼ **Figure 24:** Prevalence ratio of overweight people in adult population (2016, in percentage⁴)



A rise in the ageing population, a rising prevalence in risk factors for chronic diseases, and changes in technology with new innovations in the delivery of care all are factors that will change the global healthcare landscape and the demand for health services in the UAE over the next decade.

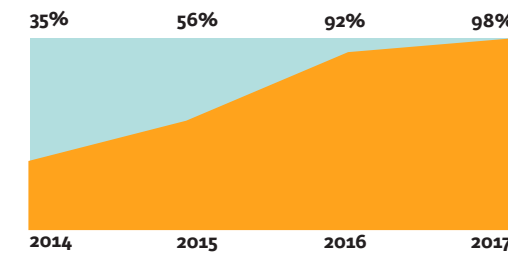


Dr. Ibtesam AlBastaki
Director, Investment and PPPs
Department, DHA

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 26:** Share of insured population in Dubai (2014-2017, in percentage)



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).

■ Insured population
■ Non-insured population

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

In 2019,
64% of health
expenditure was
covered by **private
insurance**



5 Private sector utilisation has grown significantly and will continue to rise

Over the 2012 - 2019 period, **demand for healthcare** in Dubai **increased** at a **faster pace in the private setting** than in the public sector; **+6.3% p.a** vs **+4.4% p.a** for outpatients and **+9.8% p.a** v.s. **-3.7% p.a** for inpatients.

Figure 27: Number of outpatients in Dubai¹ (2012-2019, in million patients)

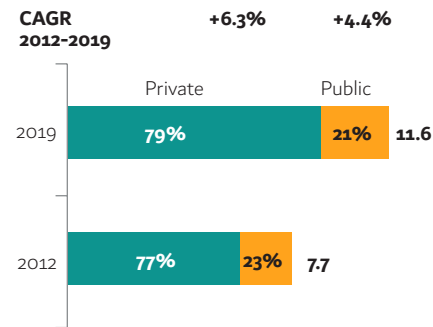
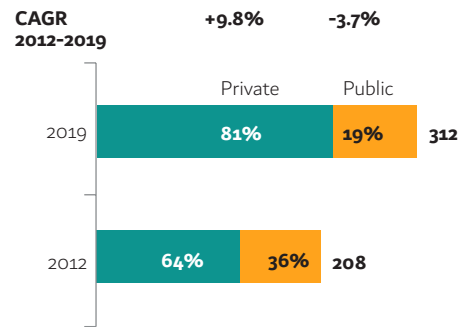


Figure 28: Number of inpatients in Dubai¹ (2012-2019, in thousand patients)

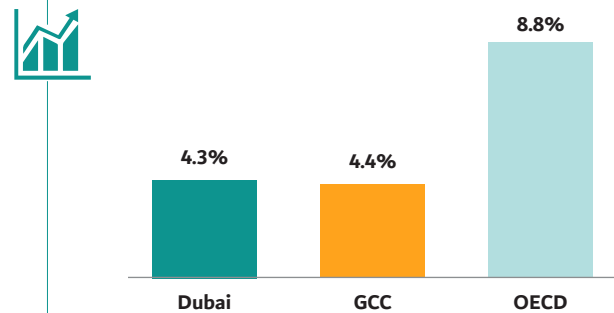


A supply-gap exists in specific types of services. This is an opportunity for private sector investment in:

- 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 29: Healthcare expenditure in Dubai vs. GCC and OECD countries² (2017, in % of GDP)



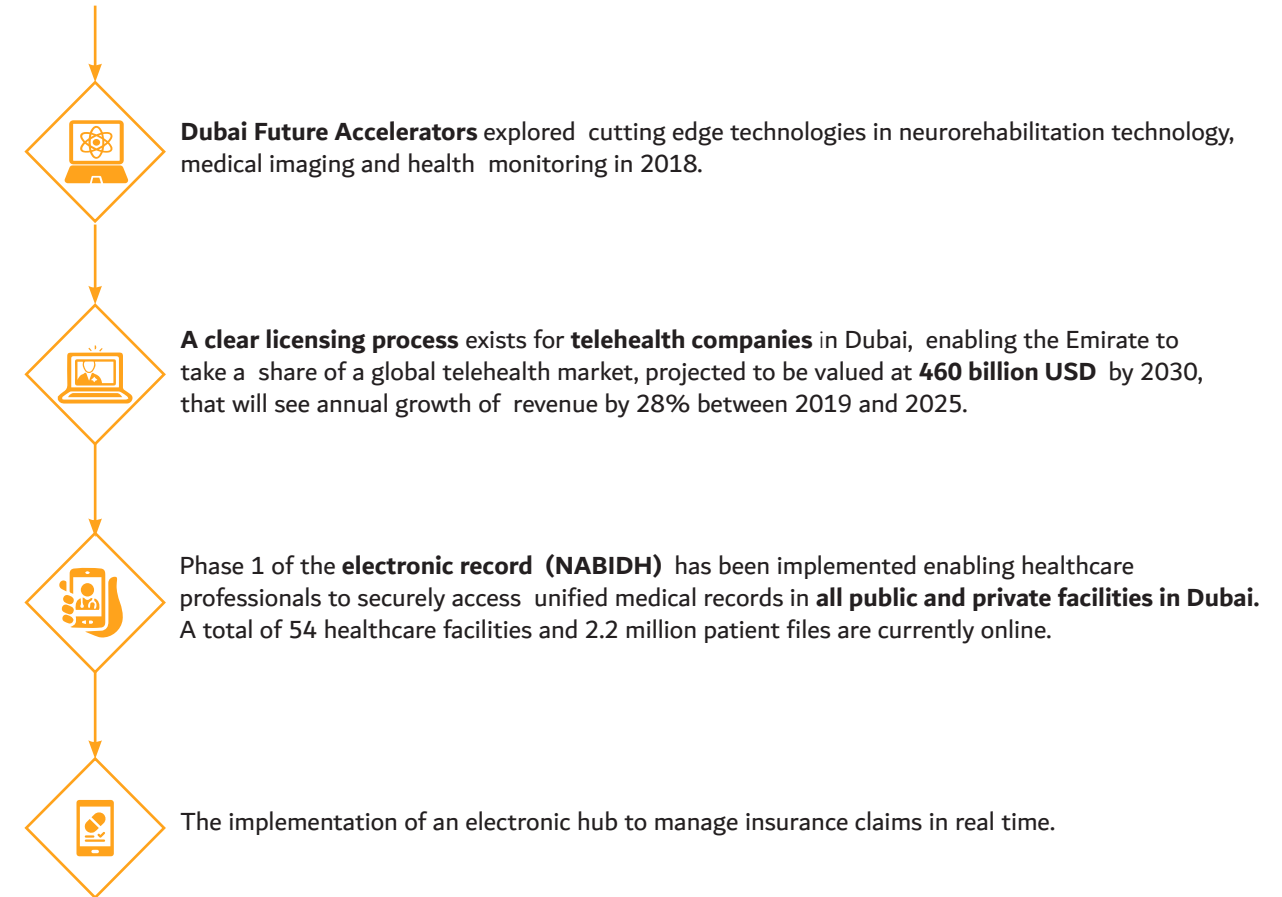
Our success in the UAE certainly can be credited also to Dubai as the centre of one of the world's fastest-growing emerging markets, with a rising population, burgeoning middle class, focus on progress and innovation in healthcare and the rigorous and ever-evolving regulation as well as the government's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



Chad Floe
Operating Partner,
TVM Capital Healthcare

1. 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. World Bank, Dubai Statistics Centre - 2017

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



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**

Revenue generated from sales within the UAE healthcare sector is forecast to grow at a compound annual growth rate (CAGR) of 7.5% to reach AED 39.4 billion (\$10.7 billion) in 2021, Dubai Chamber of Commerce and Industry predicts. We believe that Dubai's healthcare sector is on an evolutionary path driven by advancements in technology and rapid adoption of such technology across the public and private sector in light of the pandemic. The value healthcare sector continues to demonstrate opportunities for returns on investment on quality, affordable and accessible health services remain intact.



Abhishek Sharma
Chief Executive Officer,
Foundation Holdings

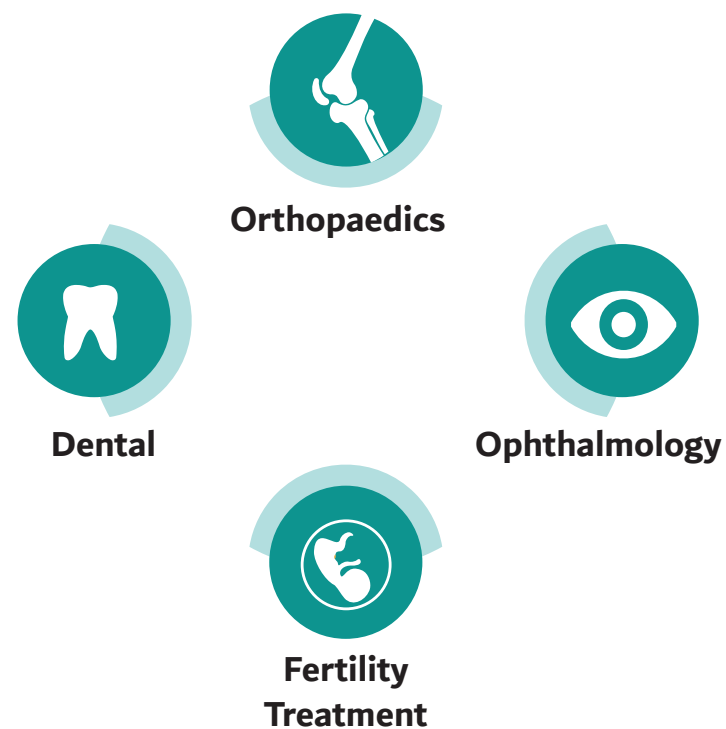
7 A leading position as a health tourism hub with scalable growth opportunities

Over **350,118 health tourists** were welcomed in Dubai in 2019, generating over **AED 726 million** in total healthcare revenue.

In 2019, **34%** of health tourists came from **Asia** and **17%** 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:



UAE has emerged as a world-leader that has set benchmarks in every sector for countries around the globe to follow. The Strategic Vision of the Rulers of UAE to establish the country as the global hub for business has ensured that Dubai emerges as the most attractive destination for investments. Today, it has been recognized as one of top safest cities in the world; it has been one of the first to open up globally for travel, tourism and hospitality; and multiple policies and initiatives like stringent vaccination drives, resident visa for remote workers, business owners & investors, retirees and golden card residency for talented individuals has made the city very attractive for global expats and businesses alike. In addition, Expo 2020 will bring in millions of people, all of whom will need quality healthcare services, especially as we continue to battle the pandemic. All of these factors are acting as drivers for demand and the healthcare sector ripe for investment.



Alisha Moopen
Deputy Managing Director,
Aster DM Healthcare

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.

9th most globally competitive country.¹

1st in MENA as per the Global Innovation Index.

100% repatriation of capital and profits.

1. IMD World Competitiveness Ranking 2021

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

New legislation allows **100% foreign ownership** of onshore companies and a new 10-year visa or Golden visa is 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.



Invest in Dubai provides a one stop solution for all your business requirements.

Key Services

Business Setup Recommendation

Start-up Support and Venues

Business Map

Find your Free Zone

Visas and Residency

Funding Opportunity

Renew License

USEFUL INFORMATION:
<https://invest.dubai.ae/>

Health Investment Needs and Opportunities

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

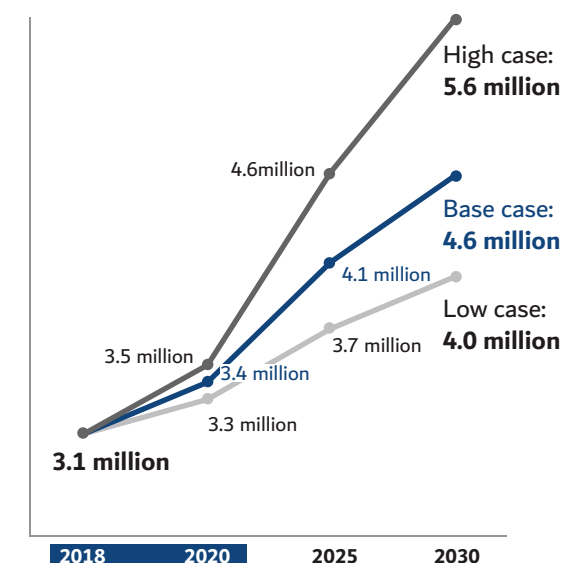
The Dubai Clinical Capacity Plan 2018 - 2030, depicts the following:

- 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 of 2.6%, 3.8% and 5.6% p.a. between 2018 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.

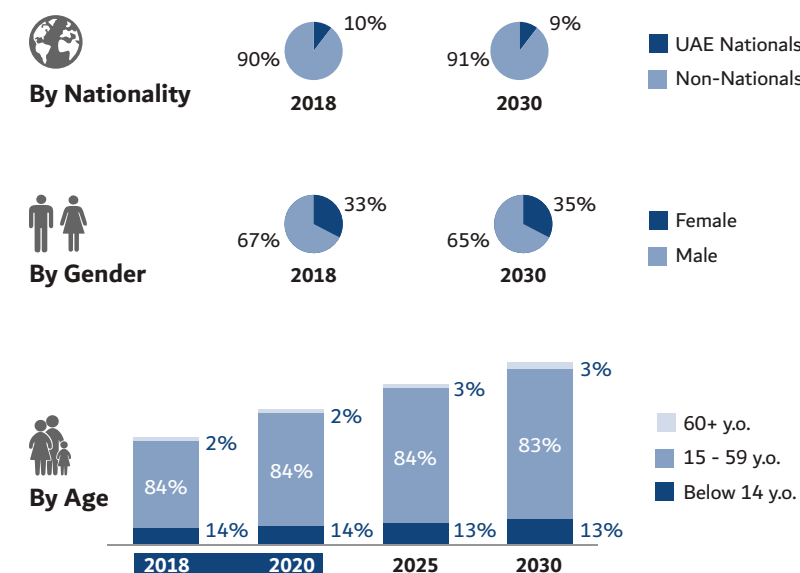
Dubai population projections, by type, 2018-2030

Figure 30: Population forecast of Dubai (2018-2030, in number of inhabitants)



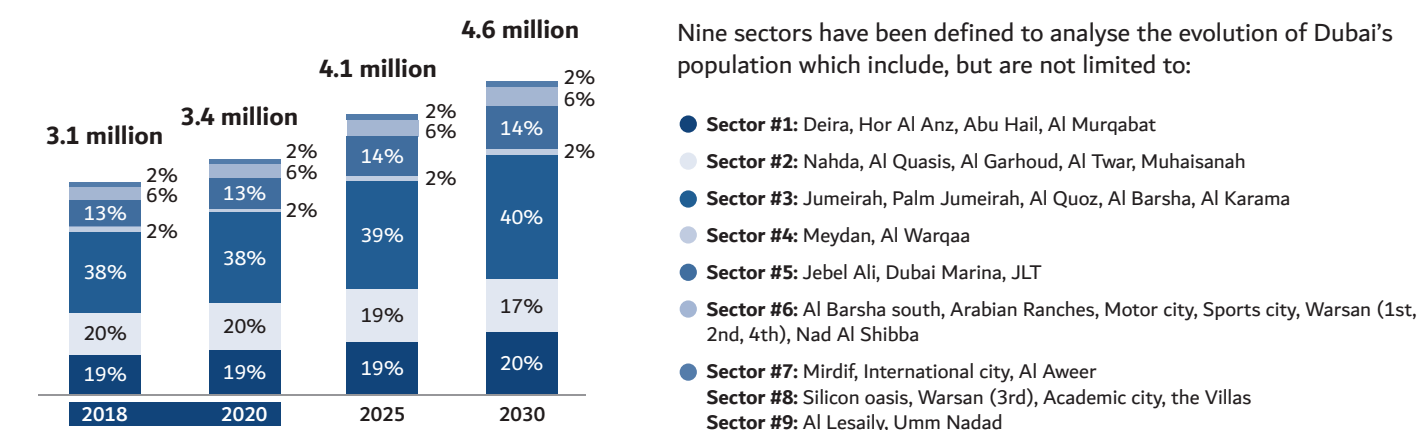
Source: DHA Clinical Services Capacity Plan 2018-2030, Base scenario

Figure 31 : Forecasted breakdown of Dubai's population, by type (base case, 2018-2030, in percentage)



Dubai population projections, by sector, 2018-2030¹

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



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



Specialty	Gaps (base case)			Specialty	Gaps (base case)		
	2020	2025	2030		2020	2025	2030
Primary Care	198	501	726	Allied Health	120	194	262
Paediatrics	60	76	228	General Medicine	276	61	213
Respiratory Medicine	100	145	209	Endocrinology	46	110	189
Neurology	75	116	157	Gastroenterology	8	67	151
Oncology & Haematology	35	63	99	Orthopaedics & Rheumatology	113	34	70
Immunology & Infections	20	32	45	Urology	39	5	40
Trauma and Injury	20	28	34	Renal Medicine	3	12	27
Dentistry	15	2	25	Vascular Surgery	2	9	17
Neonatology	4	6	8	Psychiatry	57	29	2
Neurosurgery	30	26	22	ENT; Head & Neck	93	67	34
Obstetrics	164	128	45	General Surgery	115	90	59
Cardiology & Cardiothoracic	132	102	62	Ophthalmology	156	128	78
Plastic Surgery	181	174	168	Gynaecology	401	345	268
Dermatology	304	292	280				

Projections are based on the following assumptions:

1. 248 operational days per year
2. 8 operational hours per day
3. 70% planning occupancy per consultation room
4. Adjustments for National and Non-national utilisation based on current trends
5. Nursing demand has been split between adult and paediatric Hospital modes, no supply captured but absorbed by other consultation rooms

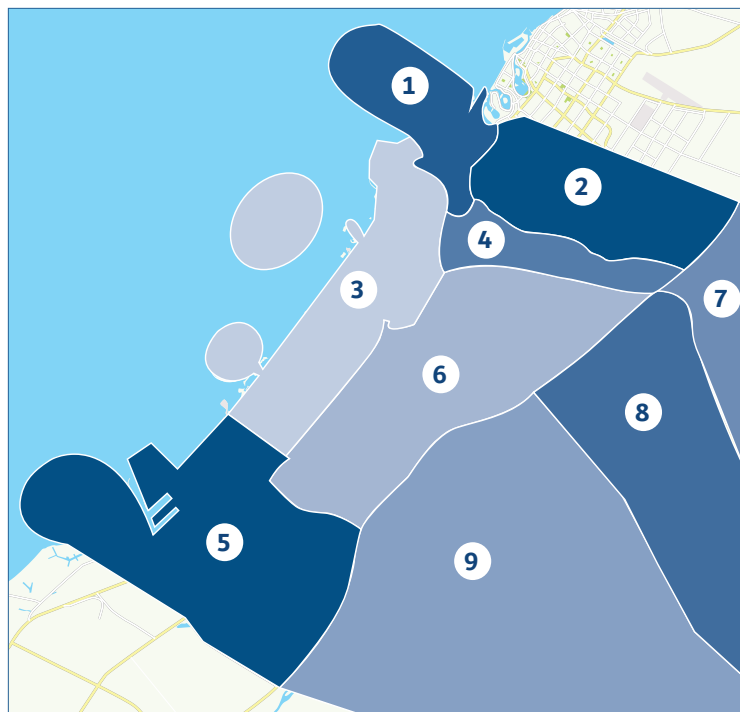
Legend

- 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 2020, 2025 and 2030, all specialties included, are as follows:



Sector 1 2020: 62 rooms 2025: 228 rooms 2030: 535 rooms	Sector 2 2020: 77 rooms 2025: 303 rooms 2030: 439 rooms
Sector 3 2020: 1,754 rooms 2025: 1,494 rooms 2030: 105 rooms	Sector 4 2020: 22 rooms 2025: 54 rooms 2030: 89 rooms
Sector 5 2020: 284 rooms 2025: 483 rooms 2030: 691 rooms	Sector 6 2020: 30 rooms 2025: 51 rooms 2030: 139 rooms
Sector 7 2020: 9 rooms 2025: 15 rooms 2030: 21 rooms	Sector 8 2020: 22 rooms 2025: 43 rooms 2030: 65 rooms

Legend

- Oversupply
- Undersupply - Investment needs

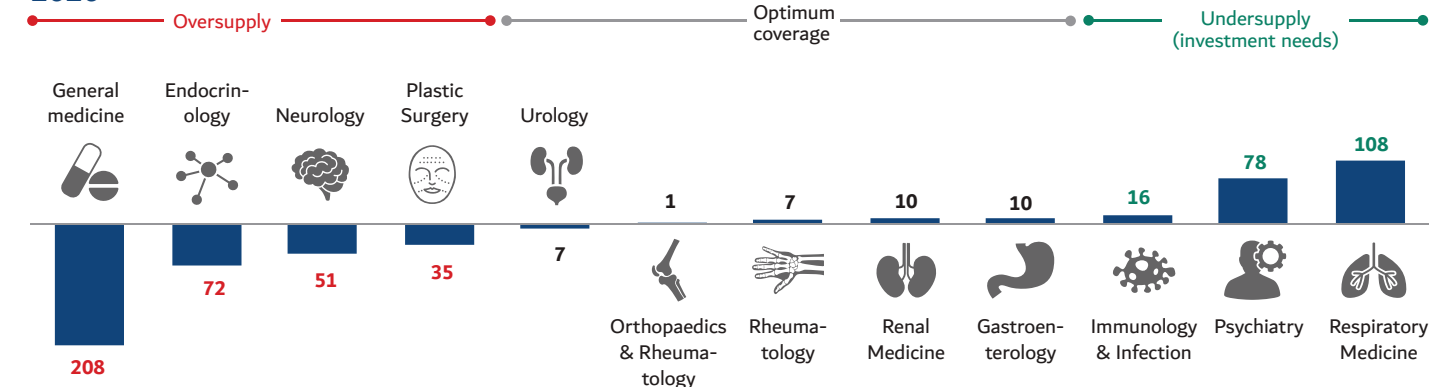
1. Analysis and results from Dubai Clinical Services Capacity Plan 2018-2030, developed by TAHPI



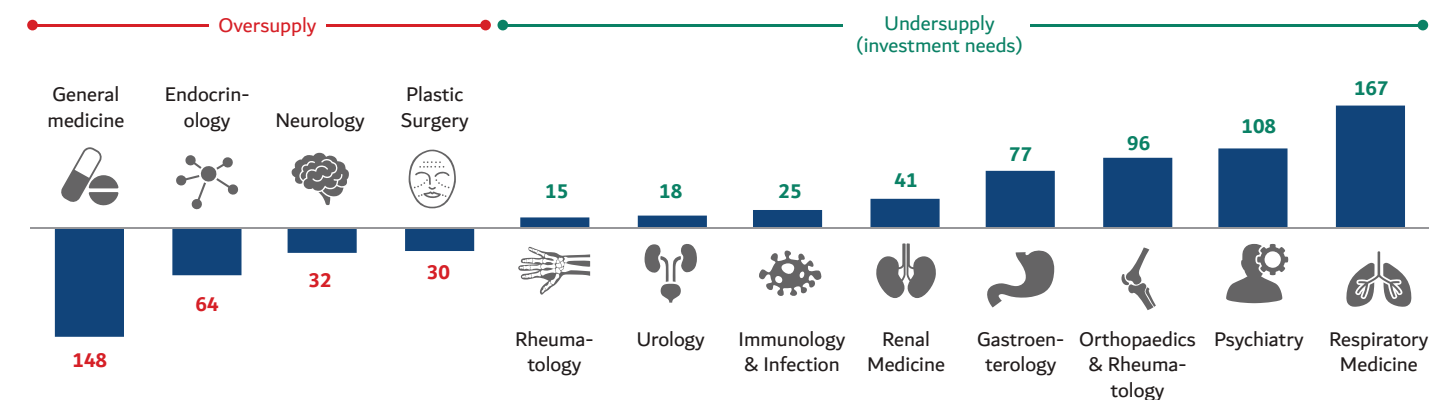
Gaps by specialty, in no. of additional acute inpatient beds required (base case)

As per the base case, the forecasted additional acute inpatient beds required by 2020, 2025 and 2030, all specialties included, are as follows:

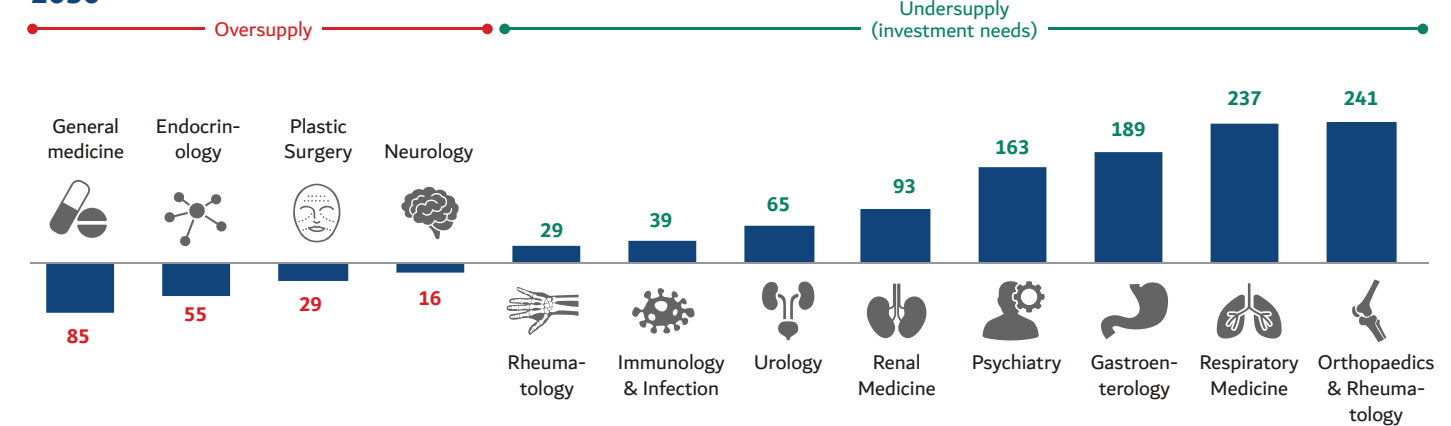
2020



2025



2030



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 (861 beds in 2020 and 1,162 beds in 2025 and 2030) has been allocated based on probabilistic assumptions on demand and supply to the various specialties

Legend

- Oversupply
- Undersupply - Investment needs

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

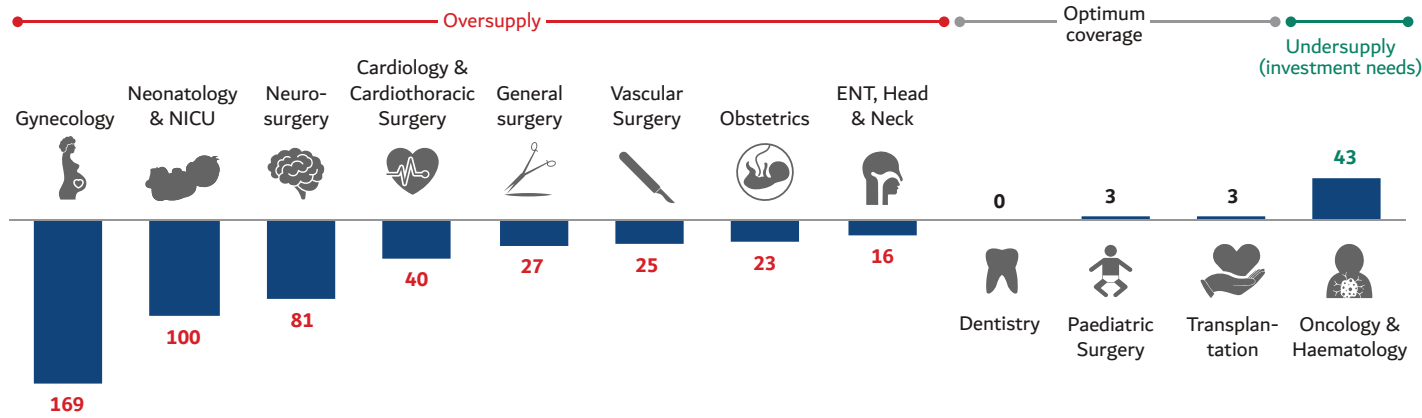
Base case: Gaps for Acute Inpatient Beds (2020-2030)¹



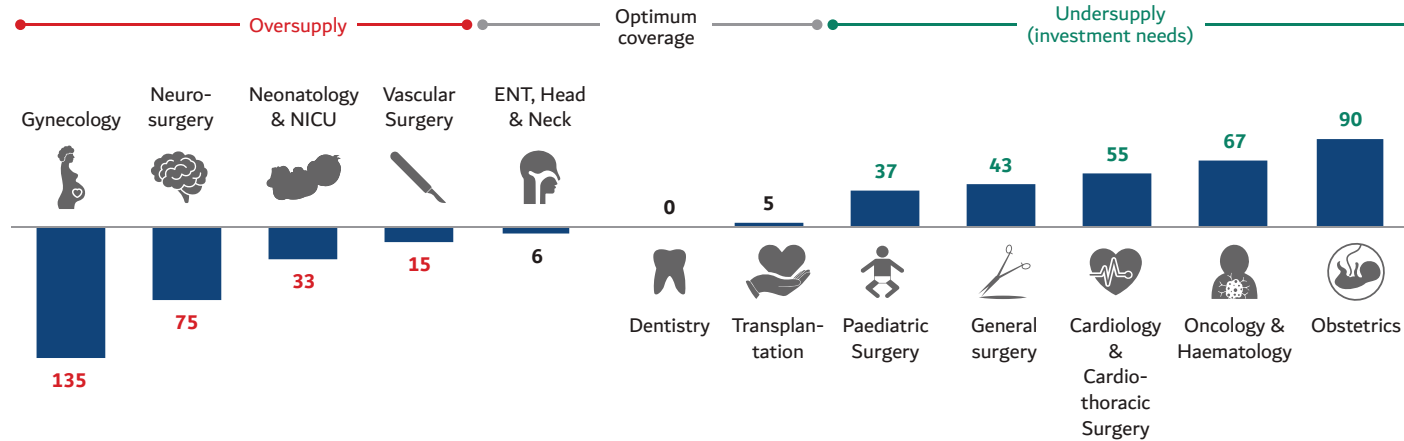
Gaps by specialty, in no. of additional acute inpatient beds required (base case)

As per the base case, the forecasted additional acute inpatient beds required by 2020, 2025 and 2030, all specialties included, are as follows:

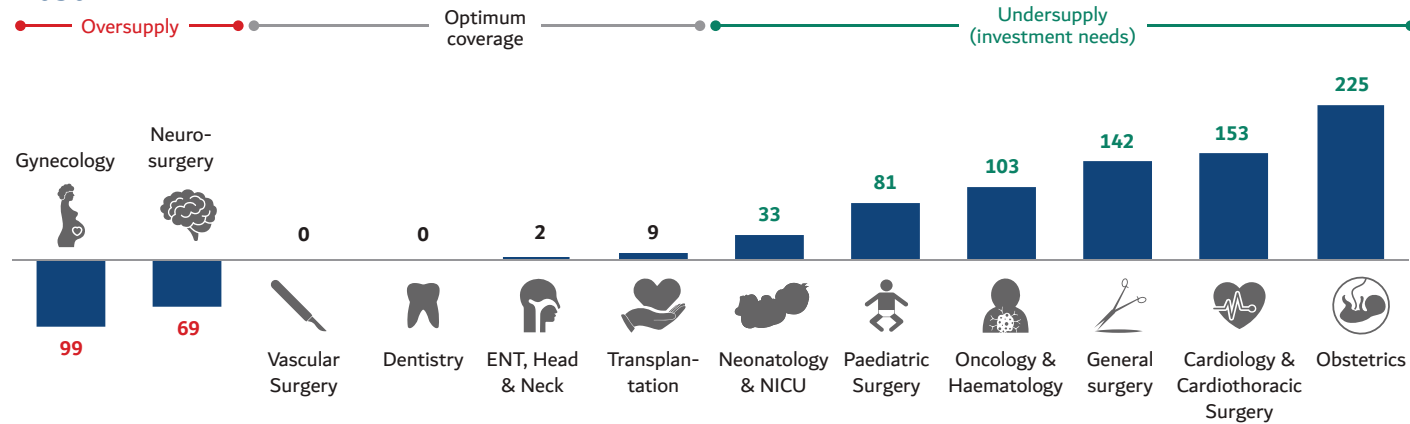
2020



2025



2030



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 (861 beds in 2020 and 1,162 beds in 2025 and 2030) has been allocated based on probabilistic assumptions on demand and supply to the various specialties

Legend

- Oversupply
- Undersupply - Investment needs

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

Zoom into: Other Key Planning Units¹



Operating Theatres

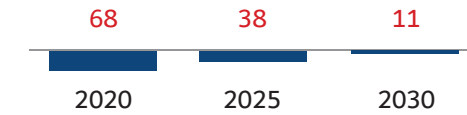
Supply-demand analysis, in number of operating theatres (base case)

	Supply			Demand			Gaps (base case)		
	2020	2025	2030	2020	2025	2030	2020	2025	2030
Operating Theatres	236	247	247	169	221	262	67	26	15

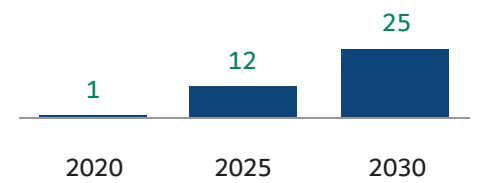
Gaps in Emergency Departments, by type (base case)



Elective



Emergency



Procedural Care Units / Medical Imaging

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

Type	Supply			Demand			Gaps (base case)		
	2020	2025	2030	2020	2025	2030	2020	2025	2030
Ultrasound	376	376	376	422	642	860	46	266	484
X-Ray	334	334	334	162	222	273	172	112	61
Computed tomography	58	58	58	64	87	108	6	29	50
Mammography	57	57	57	70	88	100	13	31	43
Magnetic resonance	59	59	59	39	56	72	20	3	13
PET scan	5	5	5	2	4	5	3	1	1
Others	32	32	32	49	66	80	17	34	48

Legend

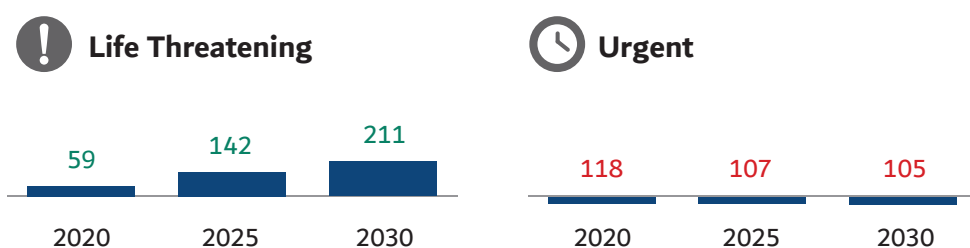
- Oversupply
- Undersupply - Investment needs

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

**Emergency Departments**

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

	Supply			Demand			Gaps (base case)		
	2020	2025	2030	2020	2025	2030	2020	2025	2030
Emergency Departments	511	521	521	451	556	628	60	35	107

Gaps in Emergency Departments, by type (base case)**Critical Care Beds**

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

Type	Supply			Demand			Gaps (base case)		
	2020	2025	2030	2020	2025	2030	2020	2025	2030
Adult (ICU and CCU)	647	670	670	126	160	191	521	510	479
Paediatric (PICU)	77	77	77	32	47	54	45	30	23
Neonatal (NICU)	345	360	360	269	476	593	76	116	233

**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):				Long-term care Gaps (in no. of beds):			
2020	2025	2030		2020	2025	2030	
192 beds	331 beds	483 beds		60 beds	122 beds	192 beds	

Legend

- Oversupply
- Undersupply - Investment needs

1. Analysis and 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 to grow 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.

**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 to set-up and treat advanced specialties, for addressing the needs of prevention, diagnosis and treatment.

**Chronic disease management**

- In 2021 alone 7.4 % of SAADA patients (all UAE Nationals) accounted for 21.7% of the health spending on chronic disease management programs. These programs have been introduced based on the prevalence of noncommunicable diseases which is particularly high in UAE, where NCDs account for 76% of all deaths, more than 16% 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.

**Mental health**

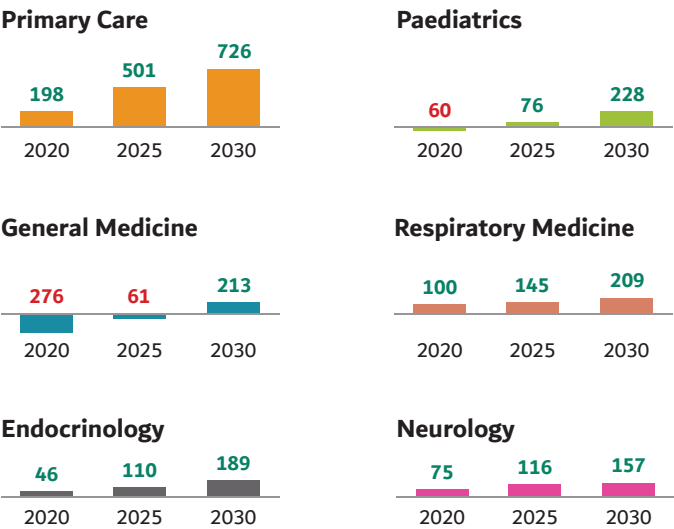
- Based on WHO's international classification of diseases, it is estimated that around 15% of the population suffer from mental or substance use disorder.
- The Dubai Clinical Services Capacity Plan has estimated a gap of 231 IP beds by 2025 for Psychiatry patients.
- Mental health patients could be 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.

Source: NIDCD, NCBI, IHME, WHO, World Bank, Elsevier, Investments & PPPs department, Advention

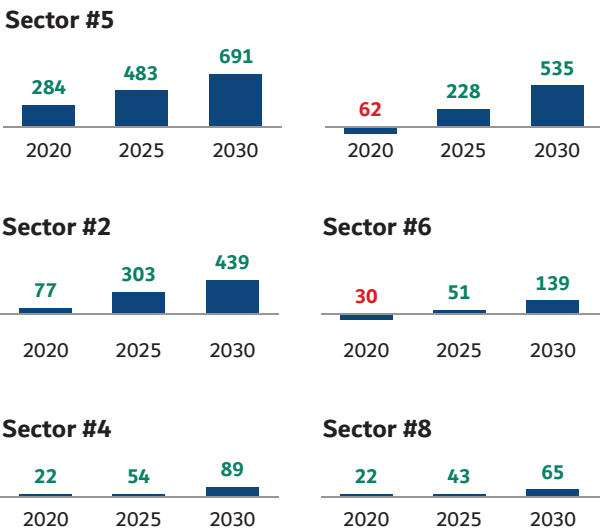
Highlights of investment priorities and opportunities (base case)

1 Outpatient Visit Rooms¹

Gaps per specialty, in number of outpatient visit rooms

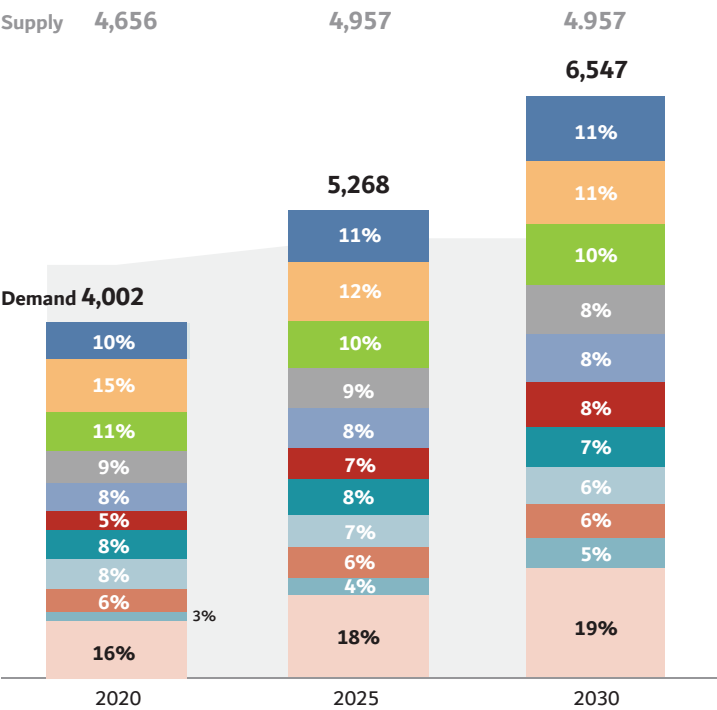


Gaps per sector, in number of outpatient visit rooms

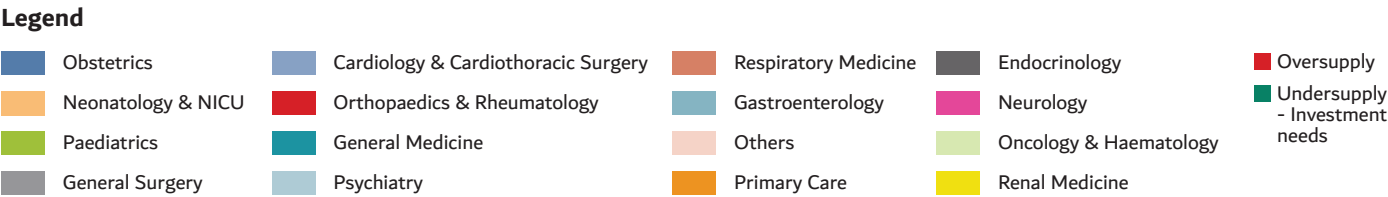
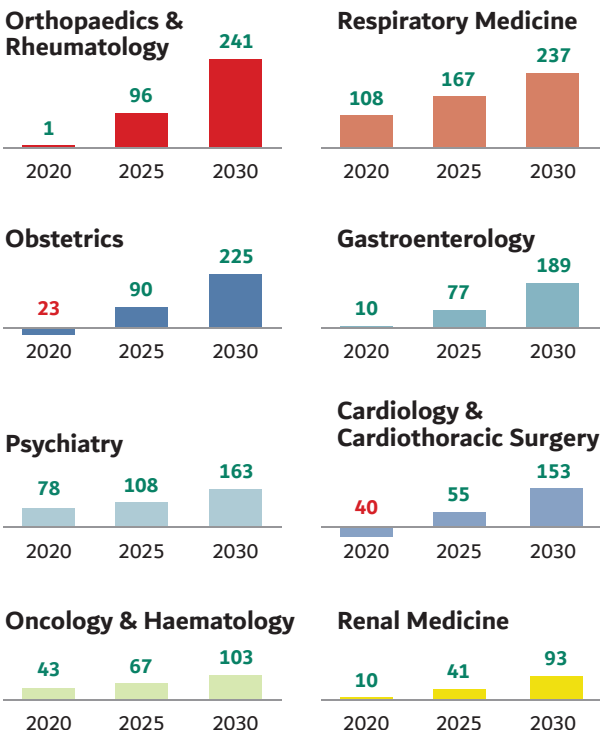


2 Acute Inpatient Beds¹

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



Gaps² per specialty, in number of acute inpatient beds

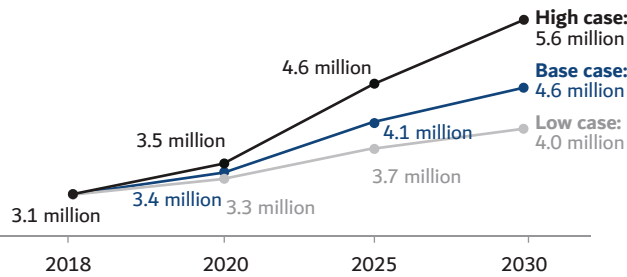


1. Analysis and results from Dubai Clinical Services Capacity Plan 2018-2030, developed by TAHPI

2. Planned bed supply (861 beds in 2020 and 1,162 beds in 2025 and 2030, as compared to 2018) has been allocated based on probabilistic assumptions on demand and supply to the various specialties

Highlights of investment priorities and opportunities (other scenarios)

Dubai population projections in number of inhabitants (2018-2030)¹



Gap analysis for the low, base and high cases, per planning unit (2020-2030)

Speciality	Low			Base			High		
	2020	2025	2030	2020	2025	2030	2020	2025	2030
Outpatient visit rooms	1,671	268	1,179	1,161	447	2,106	1,029	632	2,346
Acute inpatient beds	1,466	361	755	955	311	1,590	823	485	1,806
Operating theatre rooms	89	54	18	67	26	15	61	19	24
Procedural care units	302	19	237	211	113	406	188	147	450
Emergency department rooms	118	36	27	60	35	107	45	53	128
ICU beds	537	530	503	521	510	479	517	505	473
PICU beds	49	36	30	45	30	23	44	28	21
NICU beds	110	55	157	76	116	233	67	132	253
Non-acute beds	201	377	570	252	453	675	265	473	702

Legend

■ Oversupply ■ Undersupply - Investment needs

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 PPPs Department, DHA

USEFUL INFORMATION:
Dubai Clinical Services Capacity Plan 2018-2030: To be released soon, visit www.dha.gov.ae for up-to-date information

KEY POINTS OF CONTACT:
Dr. Ibtesam AlBastaki, Director, Investments and PPPs | +971 4 219 7644 | IIAlBastaki@dha.gov.ae

Impact of Covid-19

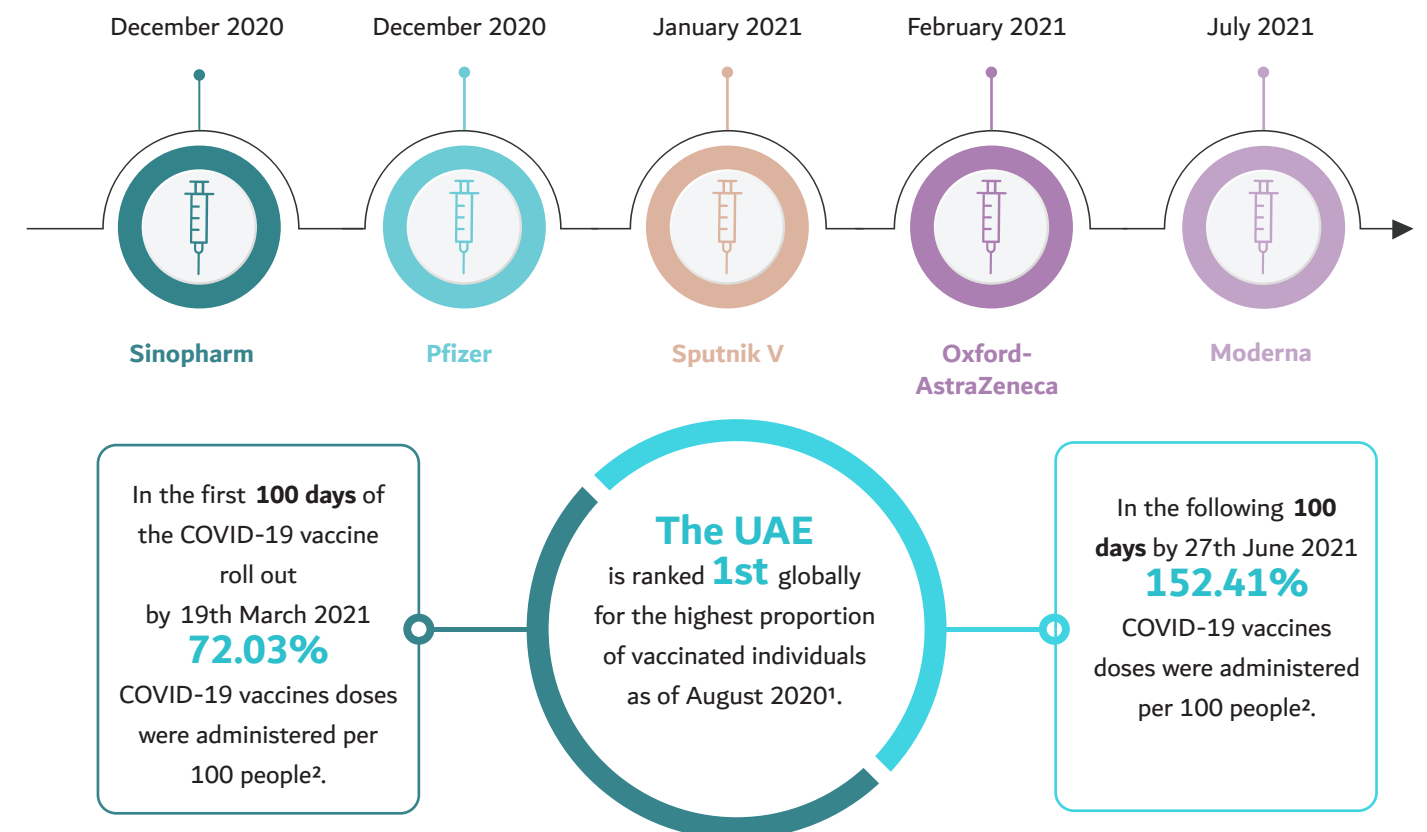


COVID-19 has been a catalyst for the healthcare sector in the United Arab Emirates

The year 2020 has brought with it an unprecedented challenge in the form of COVID-19, putting a strain on the healthcare and economic pulse of the entire world. However, as a result of the continuous investments which have been made to improve the sector's hard and soft infrastructure, the UAE has been recognised as being one of the safest locations in the world in the fight against COVID-19.

With many countries beginning to lift lockdown measures and gradually return to some form of normality, the scale of the pandemic's economic impact will be realised over the coming months, with fundamental structural changes expected to occur in many economies. Alongside this, the COVID-19 pandemic has also raised many questions as to the future structure of the healthcare sector both in the UAE and globally.

The UAE has been at forefront in the battle against Covid-19. One of the key initiatives was the rolling out of an extensive vaccination program, which permitted the use of the following five COVID-19 vaccines since December 2020.



In addition, since the outbreak of COVID-19, the UAE health sector has witnessed an increase in utilization of the following services. This trend is expected to continue going forward as more facilities are adopting these as mainstream services.



Telehealth



Home Healthcare



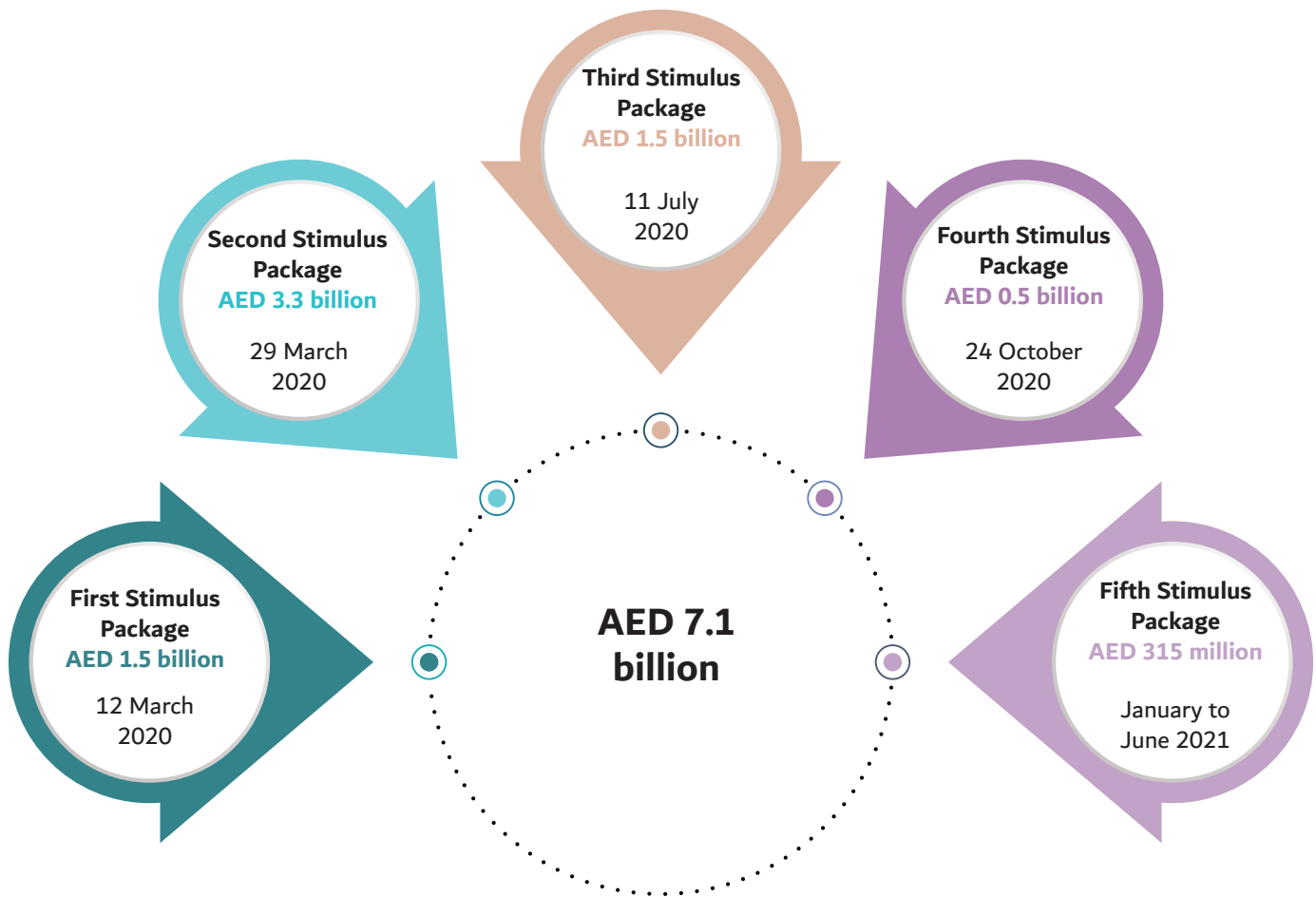
Preventive Care

1. Reuters

2. Supreme Council for National Security – National Emergency Crisis and Disasters Management Authority

Dubai Government COVID-19 : Policy Responses

- 1. The UAE has been swift in the enactment of policy from both the federal and local governments in an attempt to support businesses and in turn residents since the beginning of the pandemic.
- 2. The UAE government established numerous field hospitals, in order to increase the capacity for COVID-19 patients. The Dubai Field Hospital in Dubai World Trade Center (DWTC) opened on 18 April 2020. By the end of April 2020, four field hospitals were launched in the northern emirates, increasing capacity by 5,000 beds.
- 3. The government of Dubai launched an AED 1.5 billion economic stimulus package on March 2020 to support its econom. This was further extended by the same amount in July 2020. In the six months to January 2021, further stimulus packages were announced, bringing the total to over AED 7.1 billion. The initial package consisted of 15 initiatives and focused on the commercial sector, retail, external trade, tourism, and the energy sectors. Alongside this, various initiatives were undertaken by private or semi-private entities to support businesses and residents.



The UAE Government initiatives in the health sector to combat the impact of COVID-19

The exemplary and exceptional initiatives taken in the health sector by the UAE government towards the effort to contain the crisis and curtail the impact of COVID-19 were as follows:



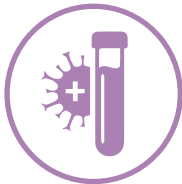
Adopting the Federal law on Mental Health.
Entity: The UAE Government



Approving the executive regulations for private health facilities aimed at enhancing the quality of their services.
Entity: The UAE Government



Approving the executive regulations for the use of information technology in health fields.
Entity: The UAE Government



Launch an interactive health map that includes data for 13 drive through COVID-19 testing centers in addition to hospitals, healthcare centers and clinics across the country.
Entity: Federal Competitiveness and Statistics Authority

Source: Federal Competitiveness and Statistics Authority

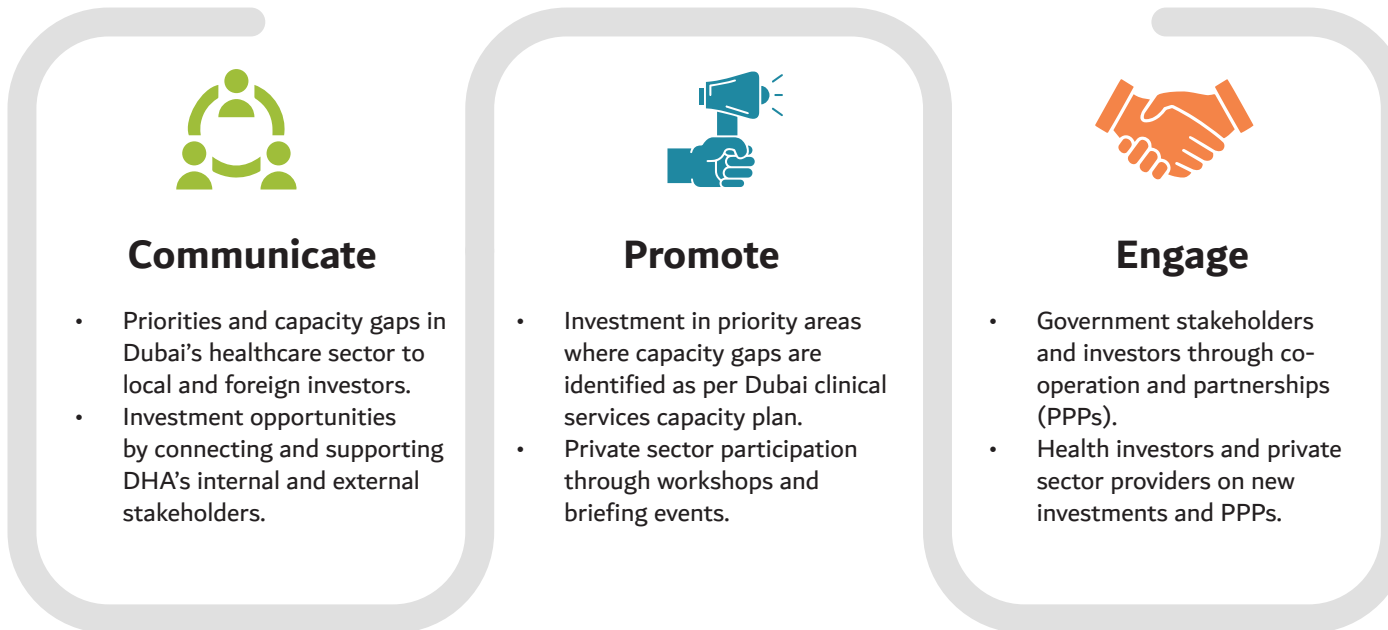
DHA Investments & PPPs Department

The Investments & PPPs Department at Dubai Health Authority aims to promote Dubai as a viable and competitive hub for investment in healthcare

- To support DHA's objective of providing healthcare in line with global best practices, and to foster innovation in all health-related sectors.
- To become a medical hub for the region by attracting investors and encouraging these to contribute to the development of targeted areas.



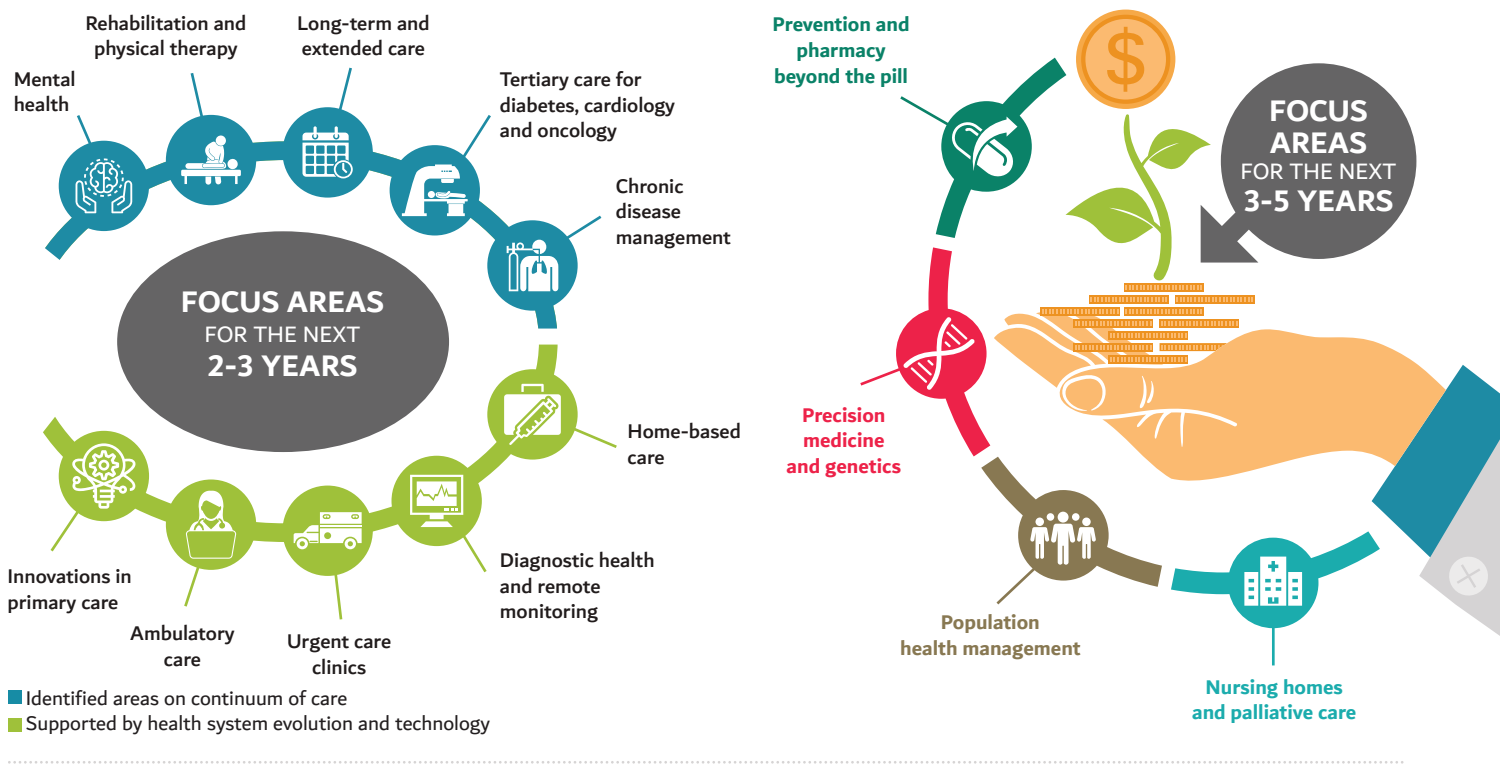
To ensure its success, the Investment and PPPs department focuses on three key components



We are thrilled at the business opportunities that EXPO 2020 will highlight to its regional and international visitors. Our contribution will showcase Dubai's position in the development of public private partnerships over the years in addition to the huge investment potential that will drive the healthcare services and shape the healthcare infrastructure in the future.

 **Dr. Ibtesam AlBastaki**
Director, Investment and PPPs Department,
DHA

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



The Investment and PPPs Department offers additional services to support DHA’s strategy

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



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



Location	
1	Jebel Ali Industrial First
2	Jebel Ali Industrial First
3	Ras Al Khor Industrial Second
4	Al Warqa Fourth
5	Oud Al Muteena First
6	Muhaisnah Second I
7	Muhaisnah Fourth
8	Hor Al Anz
9	Al Jafliya
10	Hatta
11	Margam

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 PPPs Department, DHA

Other services provided by the Investments and PPPs 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.

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

DHA is also evaluating opportunities for PPPs in 2020-2024

PPP projects range from developing new infrastructure to enhancing existing DHA services and improving access to care for the population.

Implemented Projects



Dialysis Center

1. Specialized facility to deliver hemodialysis focusing on south Dubai, located in Al Barsha area with capacity of 60 chairs.
2. An O&M partnership model is agreed for managing the dialysis services, focusing on patient convenience, clinical efficiency, quality of care and accessibility.



Dubai Physiotherapy & Rehabilitation Center

1. An interdisciplinary medical rehabilitation facility for adults, children and adolescents providing outpatient and inpatient physiotherapy and rehabilitation services.
2. An O&M partnership is agreed with specialized international operator for delivering best practices and clinical outcomes.

Upcoming Projects



Rashid Hospital Redevelopment

1. Development of new Rashid hospital complex replacing existing structure.
2. The facility shall focus to offer services on the specific specialties addressing the market gap and trauma care.



Central Laboratory

1. The central laboratory shall serve as the reference hub for the region attracting overseas out lab investigations.
2. The facility shall accommodate a state of art central laboratory specialized in Virology, Histopathology, Serology & TB lab, primarily catering to the needs of the region with potential to lead as WHO regional reference unit.

In progress Projects



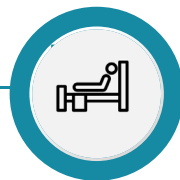
Cardiology Center of Excellence

1. Cardiology Center of Excellence focussing on multi-disciplinary cardiac care, a one stop approach with integrated care continuum.
2. Design, Build, Finance, Operate (Non Clinical) & Transfer model of partnership. Located adjacent to Rashid Hospital Trauma Center, the facility shall consolidate Dubai & Rashid Hospitals Cardiac Services by adding ~70 beds in addition to its current combined capacity.



Long Term Care Center

1. Dedicated and specialized healthcare facility to accommodate patients requiring long term care, both chronic and acute cases.
2. Design, Build, Finance, Operate & Transfer model of partnership focusing patient convenience, clinical efficiency & quality of care.



Post-acute Healthcare Management

1. A comprehensive healthcare facility dedicated to manage post-acute patients from DHA facilities.
2. An O&M partnership model to manage the patients clinically and to support in necessary repatriation requirements.



USEFUL INFORMATION:

DHA Statistics: [See Open data](#)

Dubai Health Services Navigator: To be released soon

KEY POINTS OF CONTACT:

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

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). 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:

1. establish the minimum acceptable standards for health facility design and construction.
2. maintain public confidence in the standard of health facilities.
3. determine the basis for the approval and licensing of health facilities.
4. provide general guidance to designers seeking information on the special needs of typical health facilities.
5. promote the design of health facilities with due regard for safety, privacy and dignity of patients, staff and visitors.
6. eliminate design features that result in unacceptable practices.
7. eliminate duplication and confusion between various standards and guidelines.

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



Licensed healthcare facilities and professionals¹

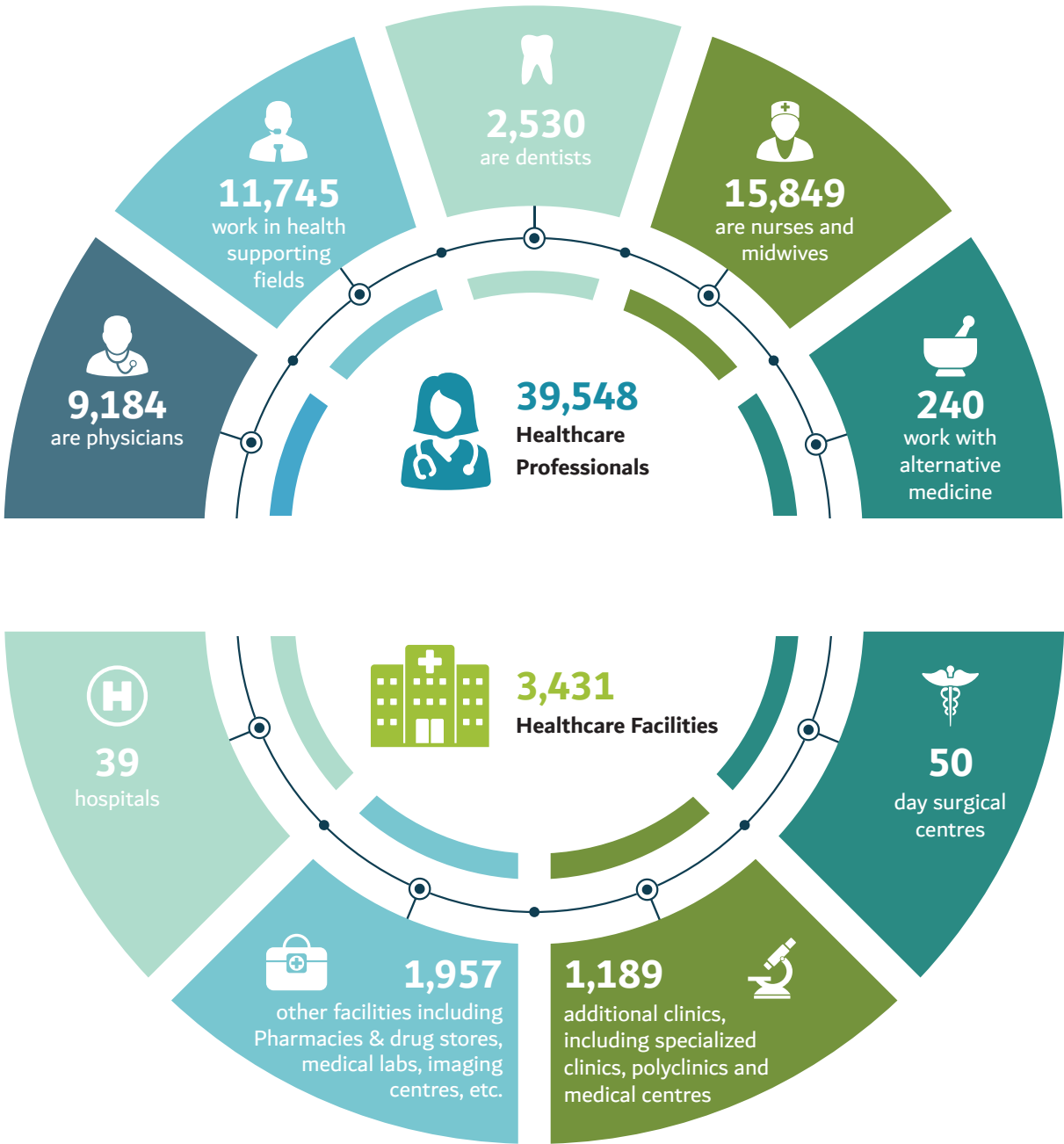
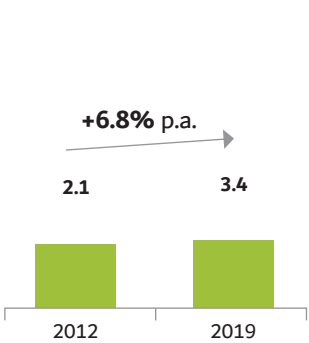
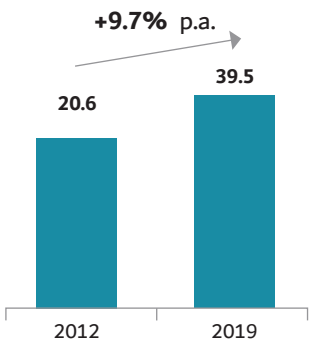


Figure 33: Number of Healthcare Facilities Dubai (2012-2019, in thousands)



Source: DHA Health Regulation Sector

Figure 34: Number of Professionals in Dubai (2012-2019, in thousands)



1. Total volume of healthcare professionals and facilities regulated by Dubai Health Authority, as of 2019

Snapshot of upcoming projects related to healthcare facilities licensing and regulation

SHERYAN PROJECT

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

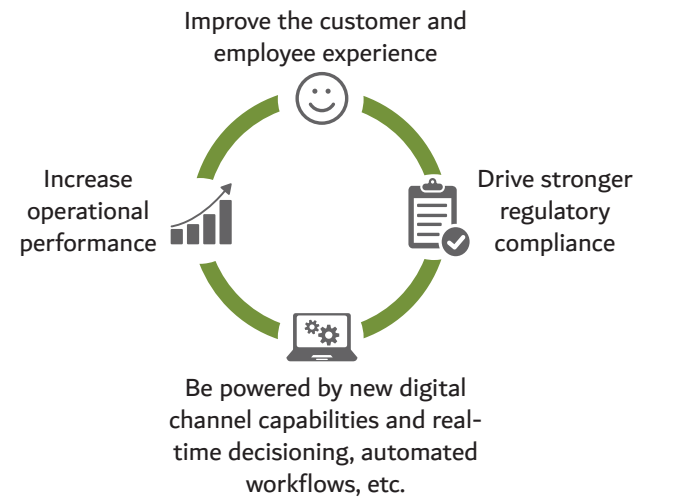
Sheryan is the online licensing and inspection system of Dubai’s Health Regulation Sector, Dubai Health Authority. Its latest version is a one-stop-portal powered by emerging technologies and supported and enabled with AI and innovation to provide citizen-centric experiences.

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)

KEY POINTS OF CONTACT:

Health Regulation Sector:
Festival Office Towers, Dubai Festival City, Floor 26, Dubai
800 342 (800 DHA) | regulation@dha.gov.ae

USEFUL INFORMATION

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

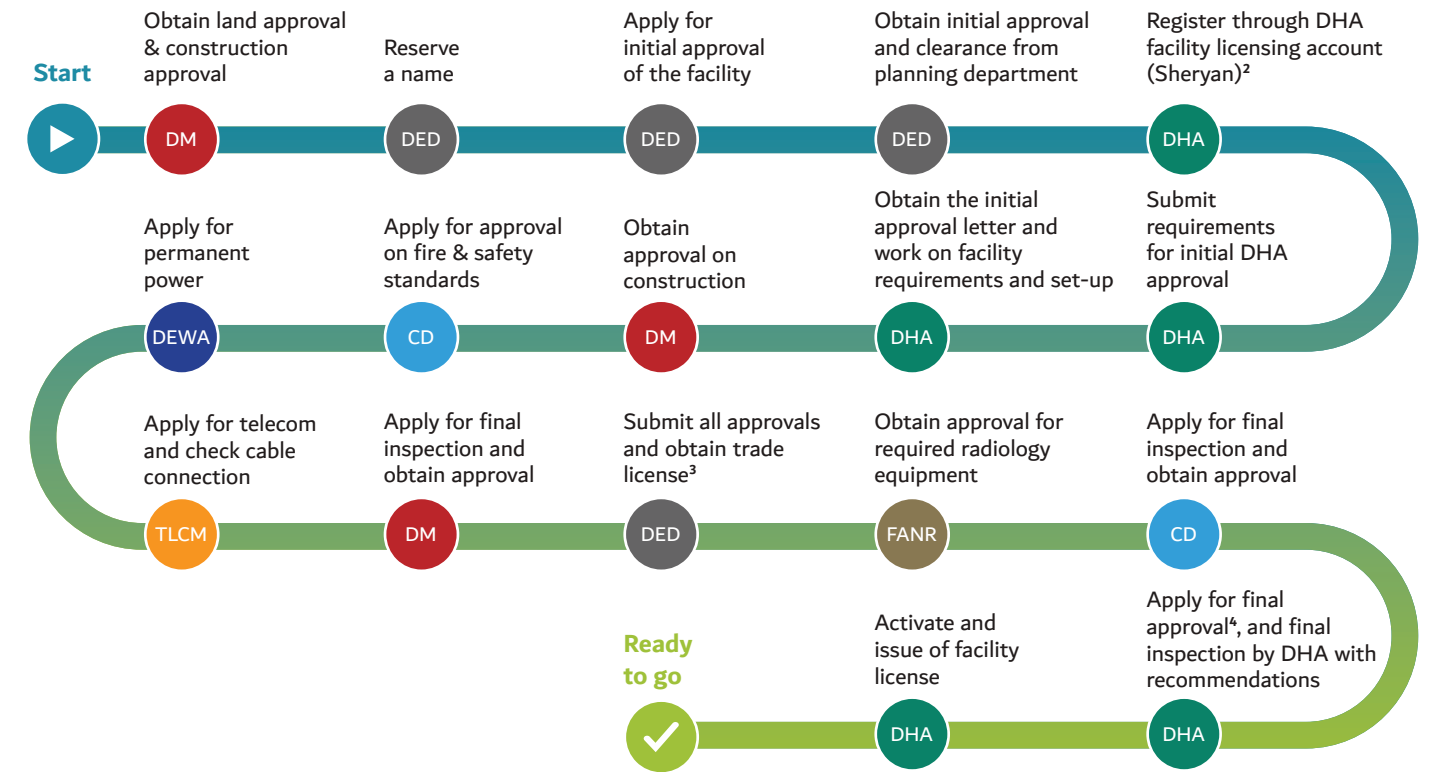
Setting up Health Facilities in Dubai



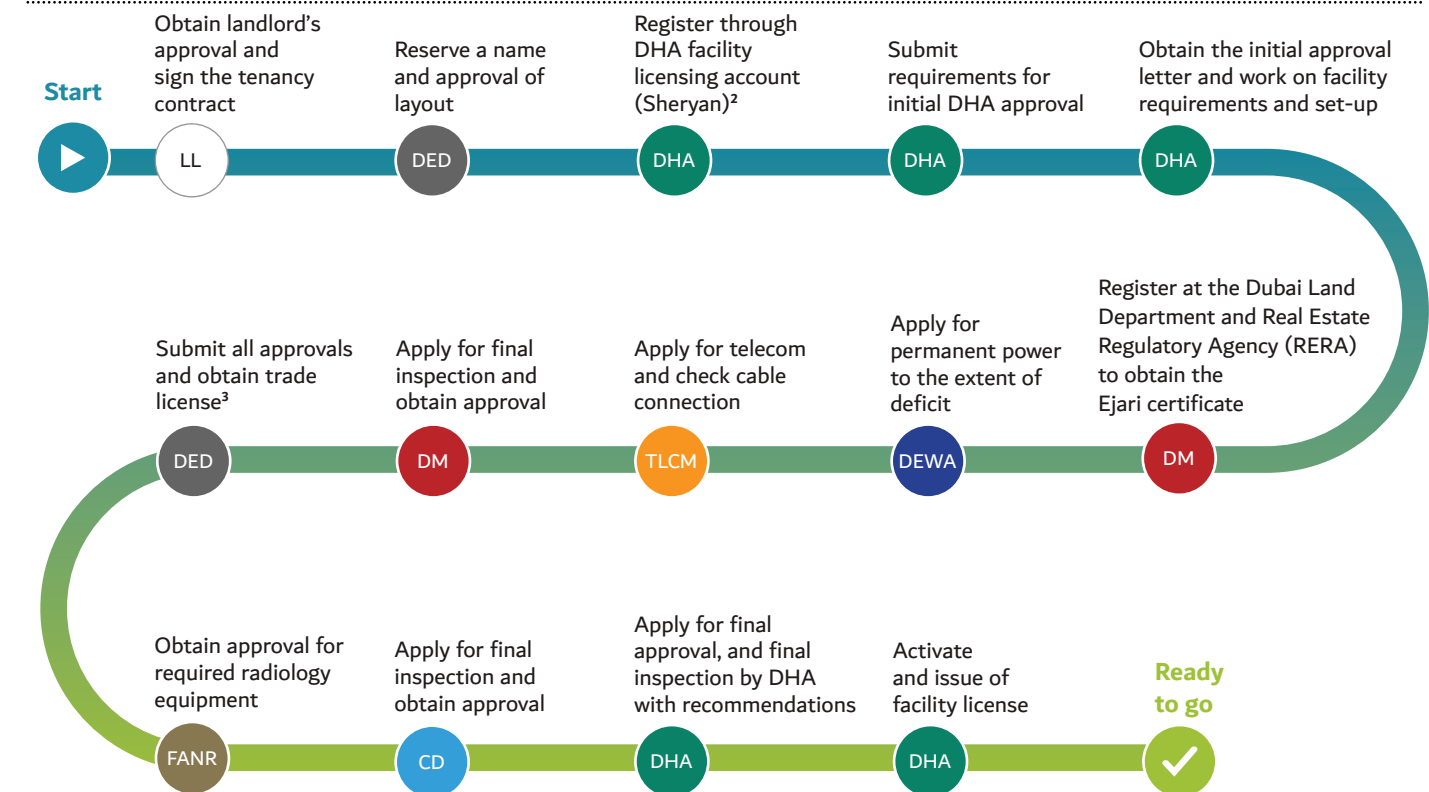
Setting up a health facility in Dubai is now an easy and smooth process, optimised by digital procedures

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 no take into account specificities that might require additional approvals (e.g. building close to a metro station will require additional approval from RTA).

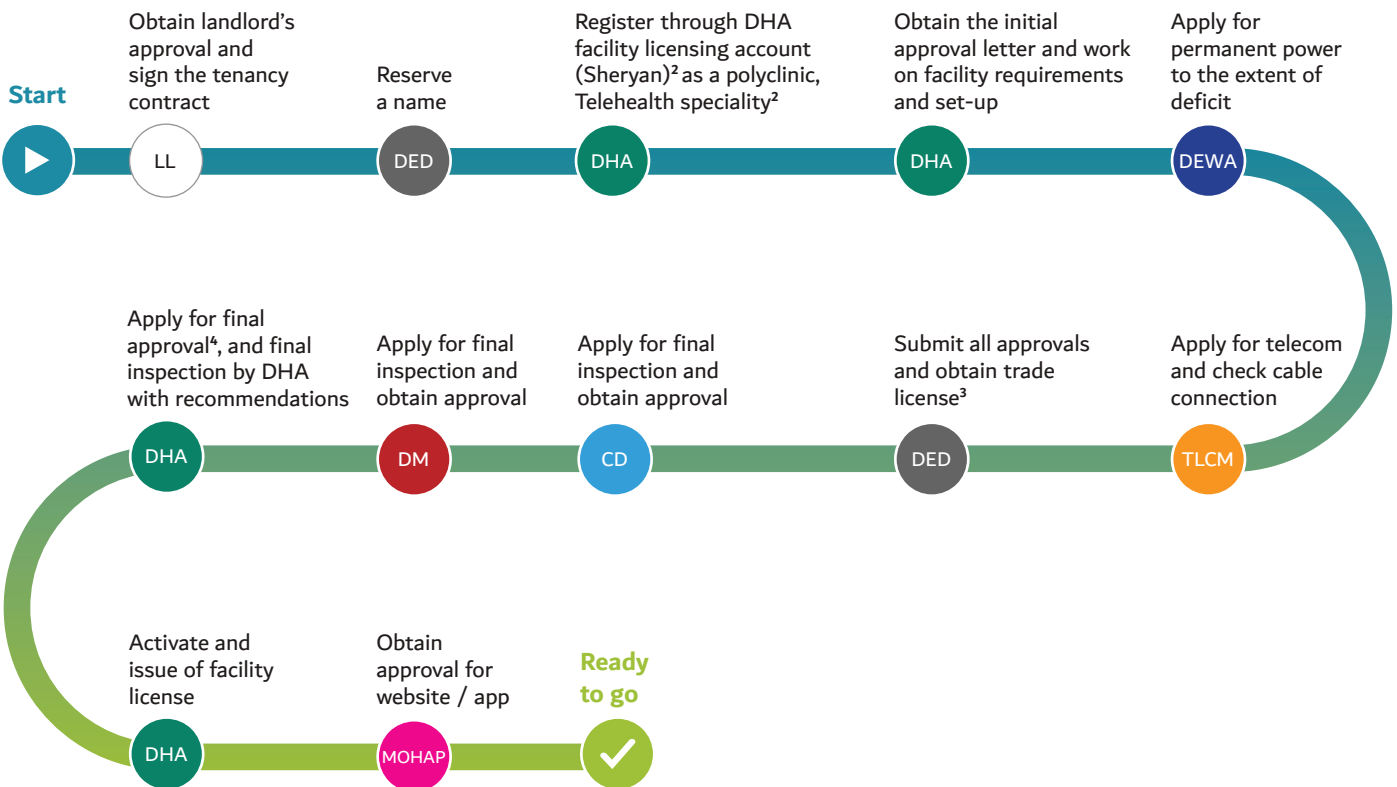
Licensing process map for Health Facilities¹: New construction



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

CD	Dubai Civil Defence	DHA	Dubai Health Authority	FANR	Federal Authority for Nuclear Regulation
DED	Department of Economic Development	MOHAP	Ministry of Health and Prevention	LL	Facility's Landlord
DEWA	Dubai Electricity and Water Authority	DM	Dubai Municipality	TLCM	Telecom operator (Du, Etisalat)
				HF	Health facility

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

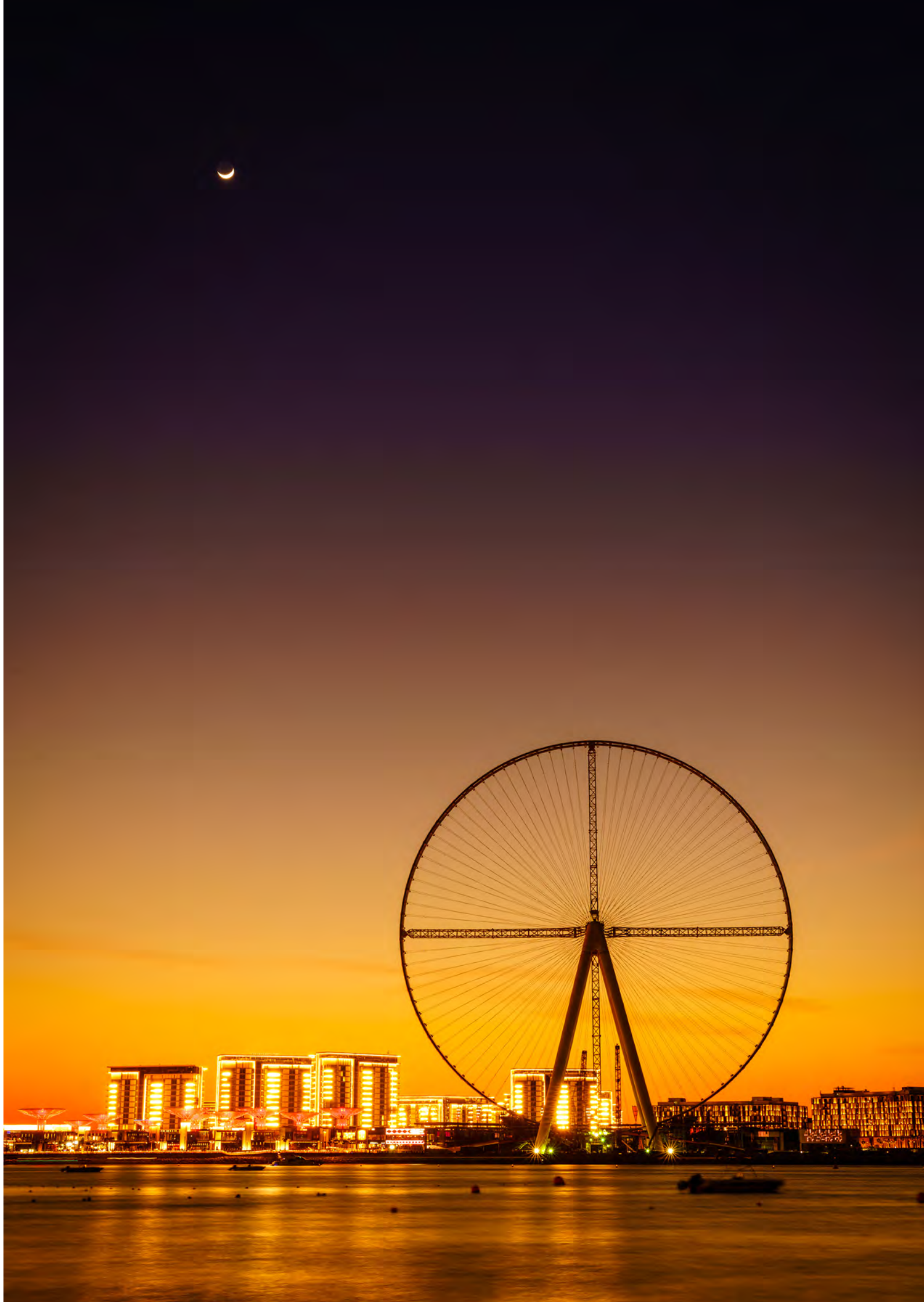
2. See DHA [e-services](#) at e-services. See DHA requirements for new facilities at [New Facility License](#)

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

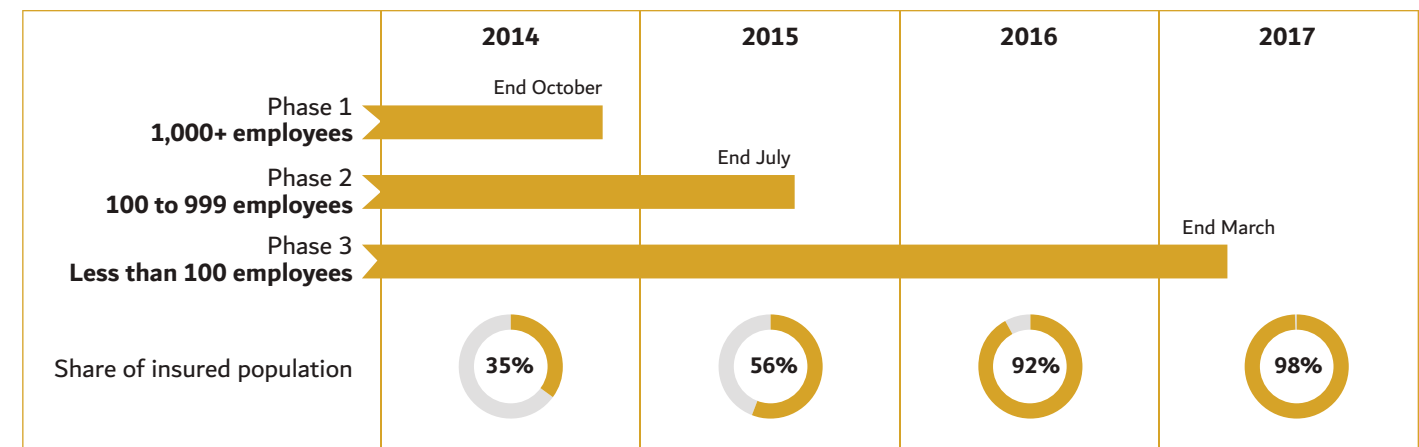
Dubai Government implemented a mandatory insurance framework in the Emirate

Dubai Government implemented a mandatory insurance framework in the Emirate (including 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.

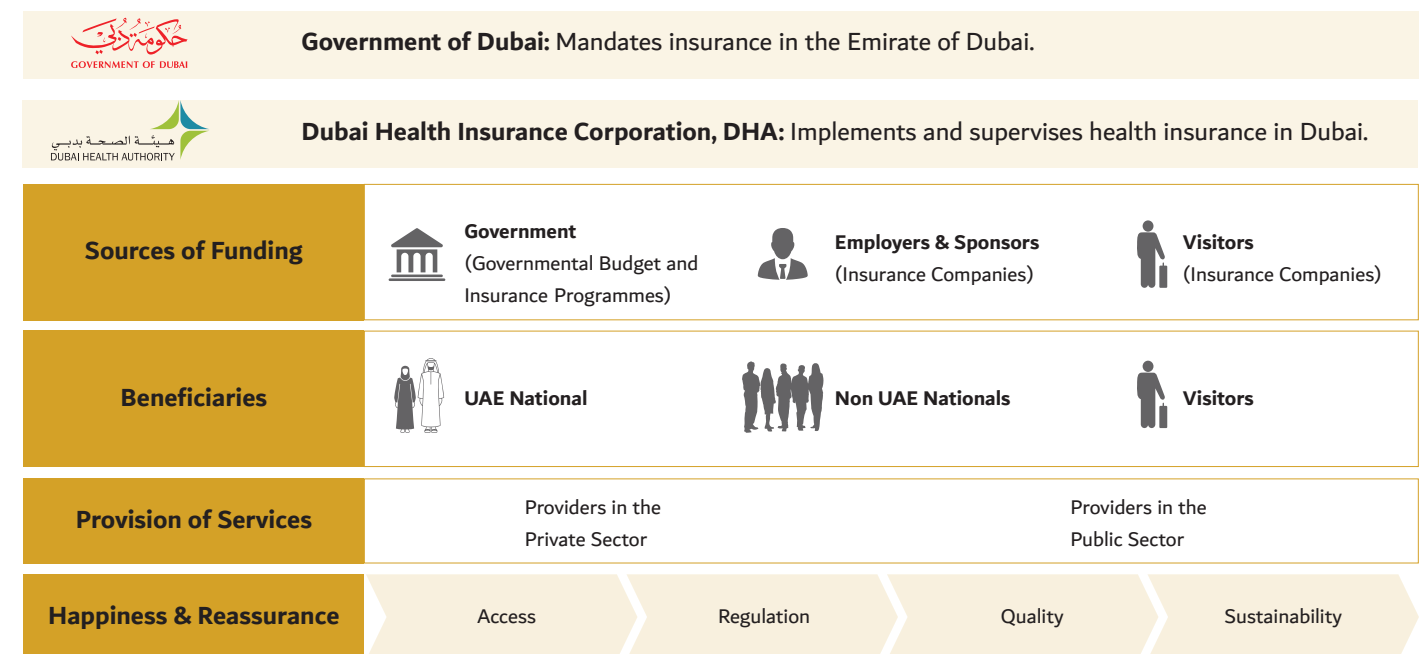
Mandatory insurance is one of the pillars of the Insurance System for Advancing Healthcare in Dubai (ISAHD) which aims to create an integrated and innovative insurance system for all Dubai citizens and residents, and to provide sustainable high-quality healthcare in Dubai for nationals, residents and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

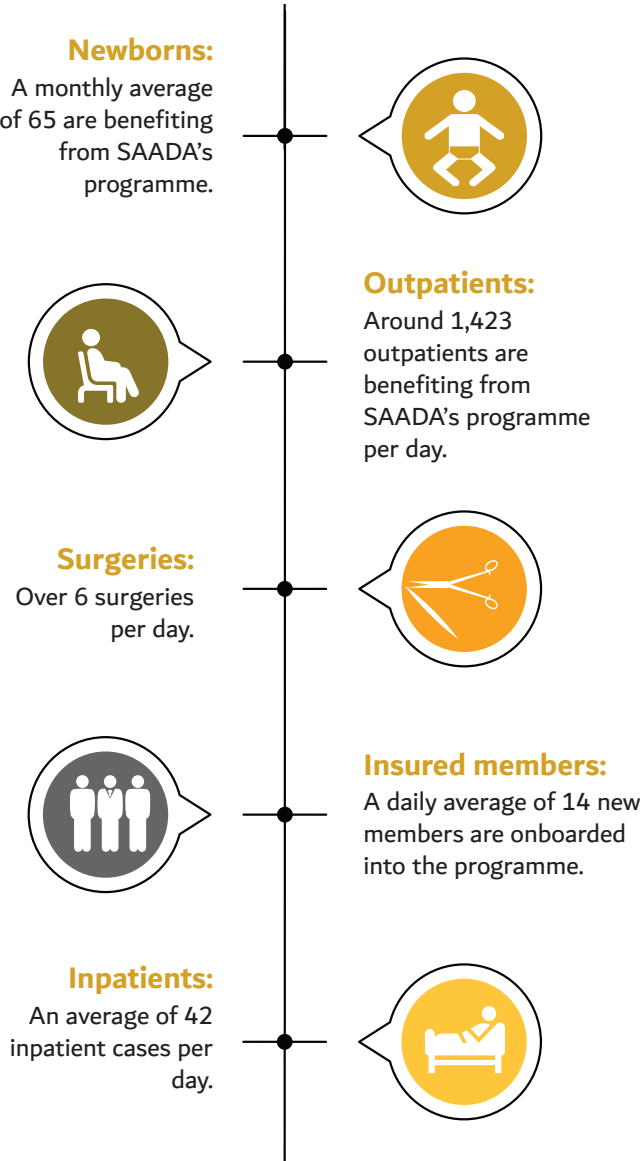
SAADA: a health insurance programme for UAE Nationals of Dubai

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.

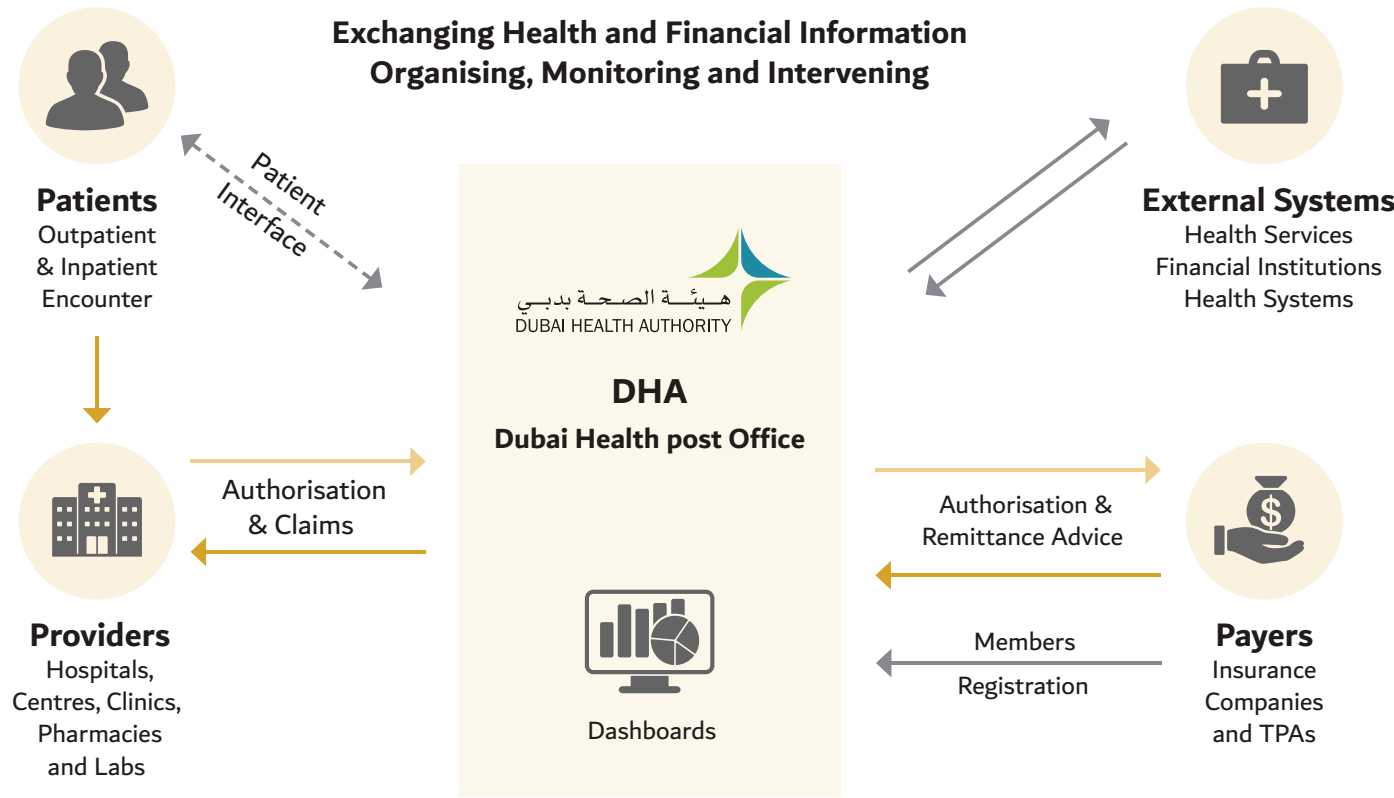
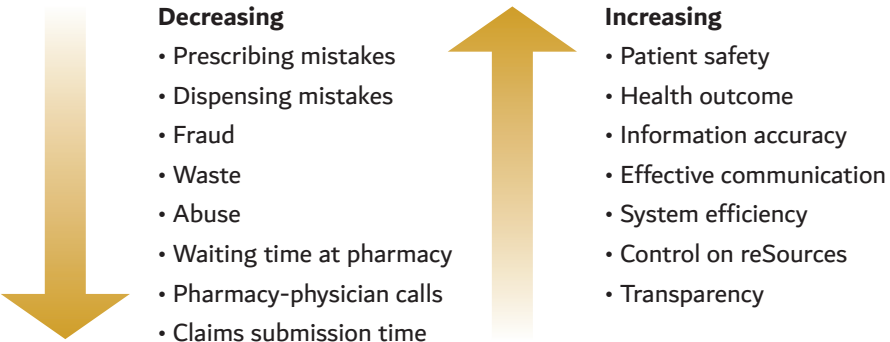
KEY STATISTICS (2020)



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



Other initiatives within eClaimLink include:
• eClaims • ePrescription • eAuthorisation and eEligibility • eReferral
Providers and payers are required to complete the registration process and enrollment once they have completed the licensing procedure with either DHA, MOH, or HAAD.

eClaimLink in Numbers - 2020



Insurance Products
12,280



Electronic claims
24.10+ Million



Insurance companies TPAs
75+



Electronic prescriptions
8.47+ Million



Insured members
4.9+ Million



Submitted Claim Activity
80.25+ Million



Healthcare providers
7,752



Physician claiming
22,891



Claims Gross
11.83+ Billion AED (10.54+ Billion AED Net , 0.726 Billion AED Patient Share)

USEFUL INFORMATION

www.isahd.ae | isahd@dha.gov.ae | +971 4 502 4139

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

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
- Relative weights
- Transfer payment
- Outlier payment
- Negotiation bands
- Add-ons payment



USEFUL INFORMATION : DRG Guidelines

<https://www.eclaimlink.ae/docs/DRG%20Guidelines%20Full%20Implementation.pdf>

Key Contact:

dhic-drgproject@dha.gov.ae | +971 4 502 4139

Snapshot of upcoming projects related to health insurance in Dubai

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.

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

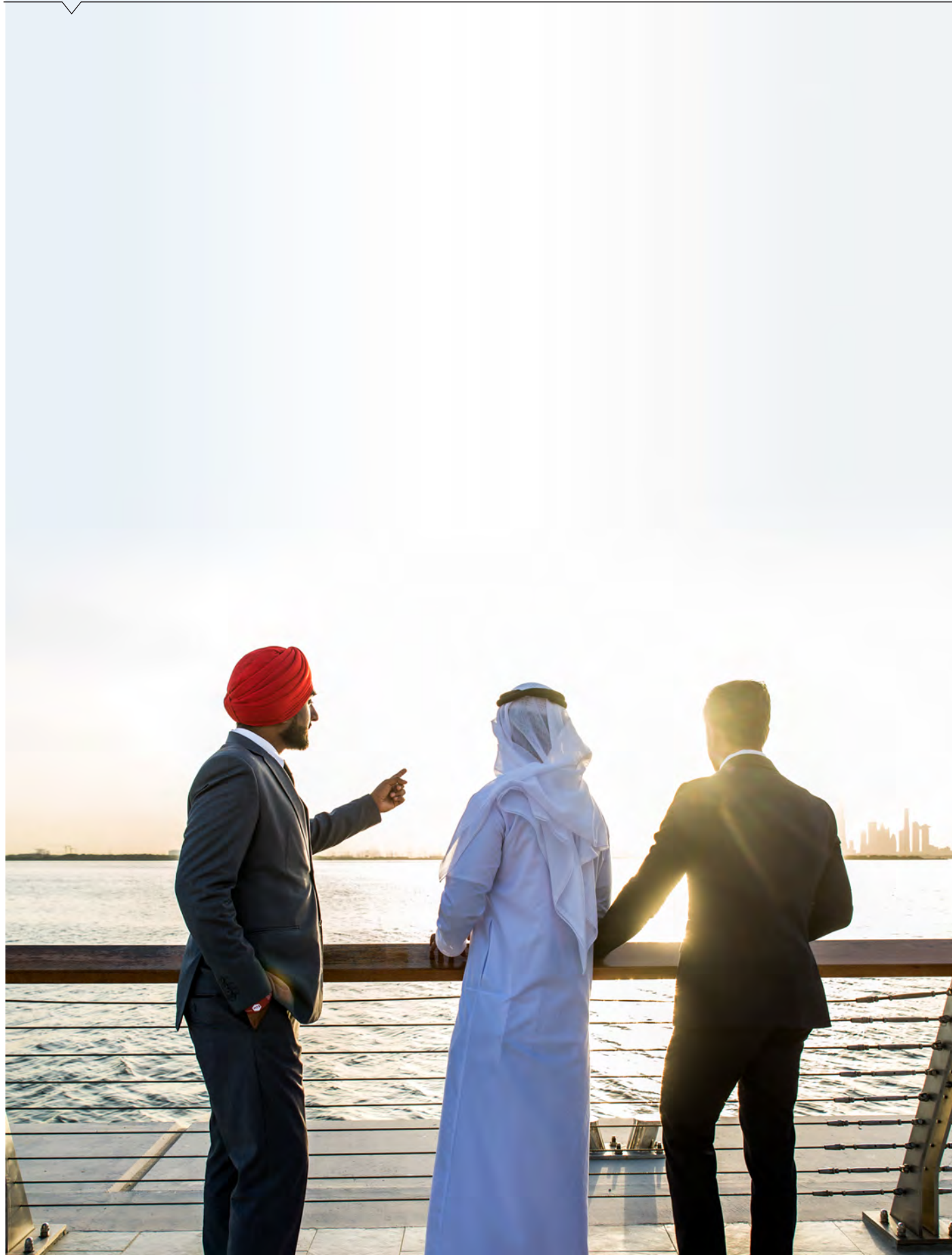
The "Dubai Standards in Healthcare" is a series of educational programmes designed **to provide healthcare practitioners** in Dubai with **best practice guidelines and standards** for services provided **through health insurance**:

- 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:

dhic_ceooffice@dha.gov.ae | +971 4 502 4139

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.



Expo 2020 Dubai will be an accelerator for the already rapidly growing healthcare sector, as the city strengthens its position as a regional and global hub of medical tourism, scientific research, and manufacturing. With the UAE’s healthcare spending projected to account for 5.1% of GDP by 2029, Dubai’s focus on centers of excellence in Cardiology, Neurology, and Rehabilitation, as well as the production of pharmaceuticals and medical equipment, all present unique investment opportunities. Dubai was ranked 1st globally in Greenfield FDI Projects and Greenfield FDI Capital in the Healthcare Sector in the last five years 2016-2020, according to fDi Markets by Financial Times. Dubai attracted a total estimated FDI capital of AED 1.07 billion in the Healthcare Sector in 2020.

His Excellency Fahad Al Gergawi,
CEO, Dubai FDI

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

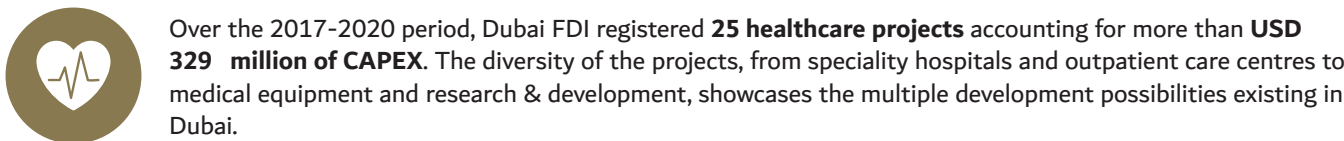
Dubai continued to lead the region and sustain its top ranking amongst leading global cities in foreign direct investment (FDI) performance:



Top Source countries: United States, United Kingdom, France, India, Netherlands.

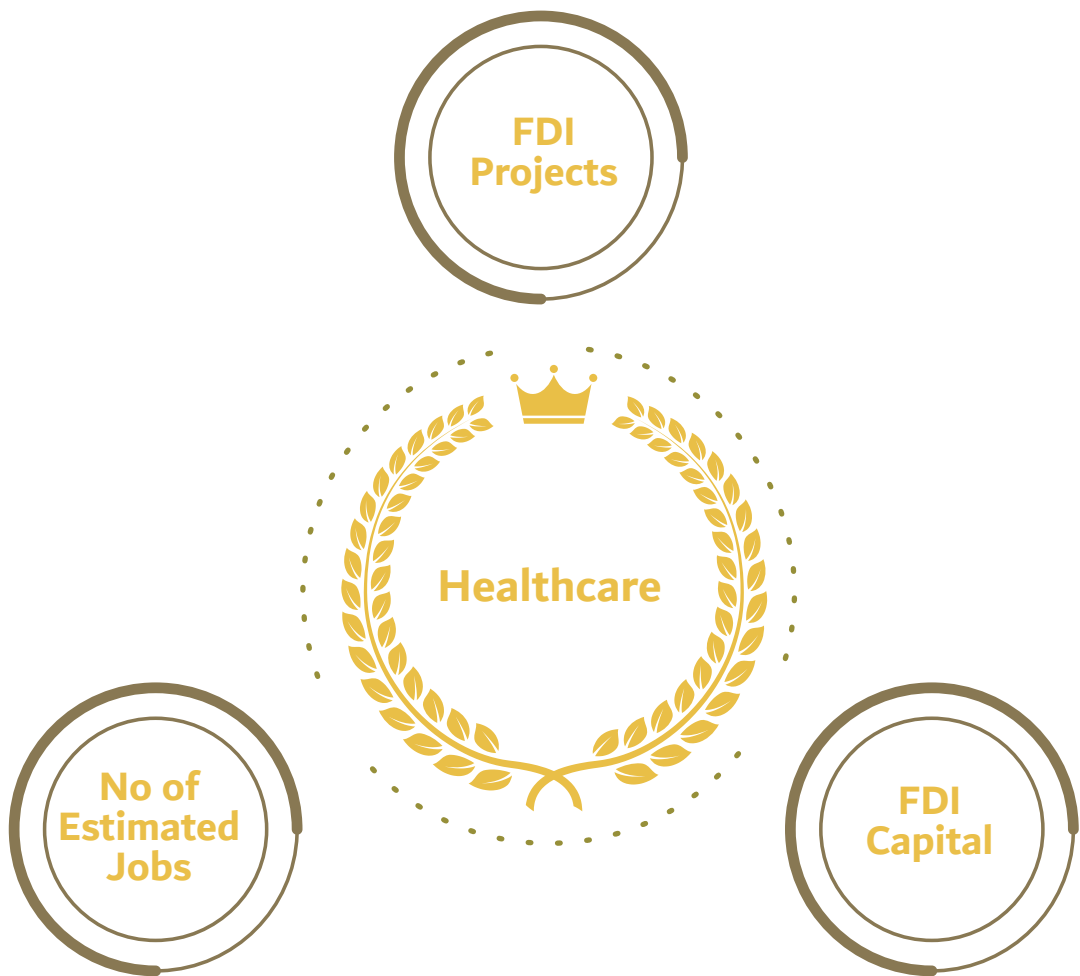
Top Source countries: United States, France, Japan, United Kingdom, Germany.

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

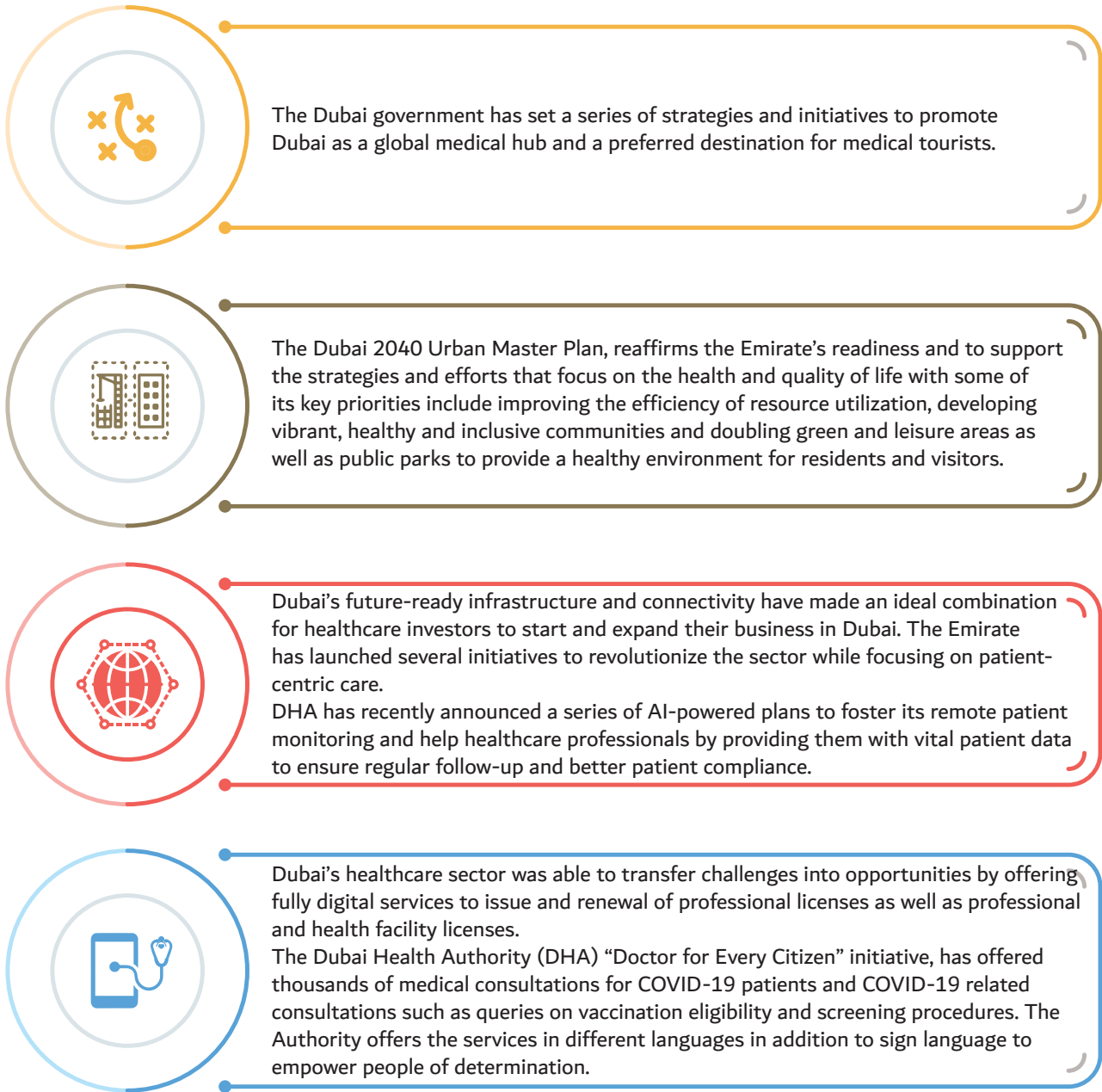


Source: Financial Times - FDI Markets

Dubai was ranked the top destination for Healthcare FDI between the years 2016 to 2020



Healthcare has been identified as a priority sector by the Dubai Government



USEFUL INFORMATION

Dubai FDI: www.dubaifdi.gov.ae
Dubai Advantage: www.thedubaiadvantage.com

SOCIAL MEDIA

@DubaiFDI

مؤسسة دبي
للتنمية الاستثمار
DUBAI FDI



KEY POINTS OF CONTACT

Ibrahim Al Ahli, Director of Investment Promotion | Ibrahim.Ahli@dubaided.gov.ae
Walid Al Marhoon, Senior Manager of Investment Promotion | Walid.Marhoon@fdidubai.gov.ae

Dubai Healthcare City



A thriving health and wellness ecosystem, Dubai Healthcare City, established in 2002, brings together core healthcare services by attracting the best in class global and regional names, as well as a network of businesses from hospitality to consultancies and retail outlets. Governed by Dubai Healthcare City Authority (DHCA), DHCC has its own regulatory body and facilitates end-to-end business set-up.

VISION

“To be an internationally recognised destination for quality healthcare and an integrated centre of excellence for clinical and wellness services, medical education, and research.”

MISSION

“We aim to deliver exceptional experiences to benefit society by enabling high quality integrated healthcare, education, and wellness through strategic partnerships.”

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.

DHCC is home to clinical partners including **hospitals, outpatient medical centres and diagnostic laboratories across 168 clinical facilities** 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; Clemenceau Medical Centre; Barraquer Eye 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 Keturah Resort. The free zone is also home to Al Jalila Children’s Speciality Hospital, the first dedicated children’s hospital in the UAE.



Al Razi Medical Complex



DHCC is a key contributor to Dubai’s goal of becoming a global leader in advanced sciences, research and healthcare excellence, in addition to serving as a hub for entrepreneurship. In just under two decades, DHCC has transformed Dubai’s healthcare landscape by establishing a robust and thriving ecosystem. Through this ecosystem we provide business-friendly free zone environment offering direct access to an unrivalled network of partners, complemented by ease of doing business in the heart of this future-focused city. Working with global brands such as Keturah Resort, which will be a flagship addition to our ever-expanding portfolio in Phase 2, in Al Jaddaf, reinforces our commitment to delivering a world-class health and wellness destination.



Jamal Abdulsalam
CEO, Dubai Healthcare City
Authority



C37 UNVEILED:

DHCC recently launched C37, a private medical workspace zone designed for visiting overseas doctors or UAE-based physicians seeking an independent, part-time practice. The initiative is a first-of-its-kind in the GCC, providing flexibility and accessibility for medical professionals.

The unique platform provides doctors and medical professionals a cost-effective, customised, and state-of-the-art medical co-working spaces and services. Visiting doctors will benefit from full-service set-up, from visa processing and licensing to special discounts on travel and accommodation, and the opportunity to network and collaborate with more than 160-plus clinics and hospitals within the DHCC ecosystem. Interested professionals can access to C37 via membership. Members will enable to secure workspace on a daily, weekly, or monthly basis, giving doctors flexibility to align with patient needs and drastically reduce overheads by accessing flexible medical staffing and equipment solutions. Registered members pay only for the staff required and can scale staff up or down in line with patient demand.

Physicians who sign up will benefit from front-desk booking service, as well as operational support including onsite management guidance with comprehensive resources, including strategic consulting, accounting, banking, legal, and marketing services. This innovative initiative is not only beneficial for the doctors, but it also offers patients in the UAE direct access to an even larger pool of leading regional and global specialists in various fields of medicine, right on their doorstep at DHCC.

Top outpatient segments and treatments in demand in DHCC



Dubai Healthcare City is spread across two phases

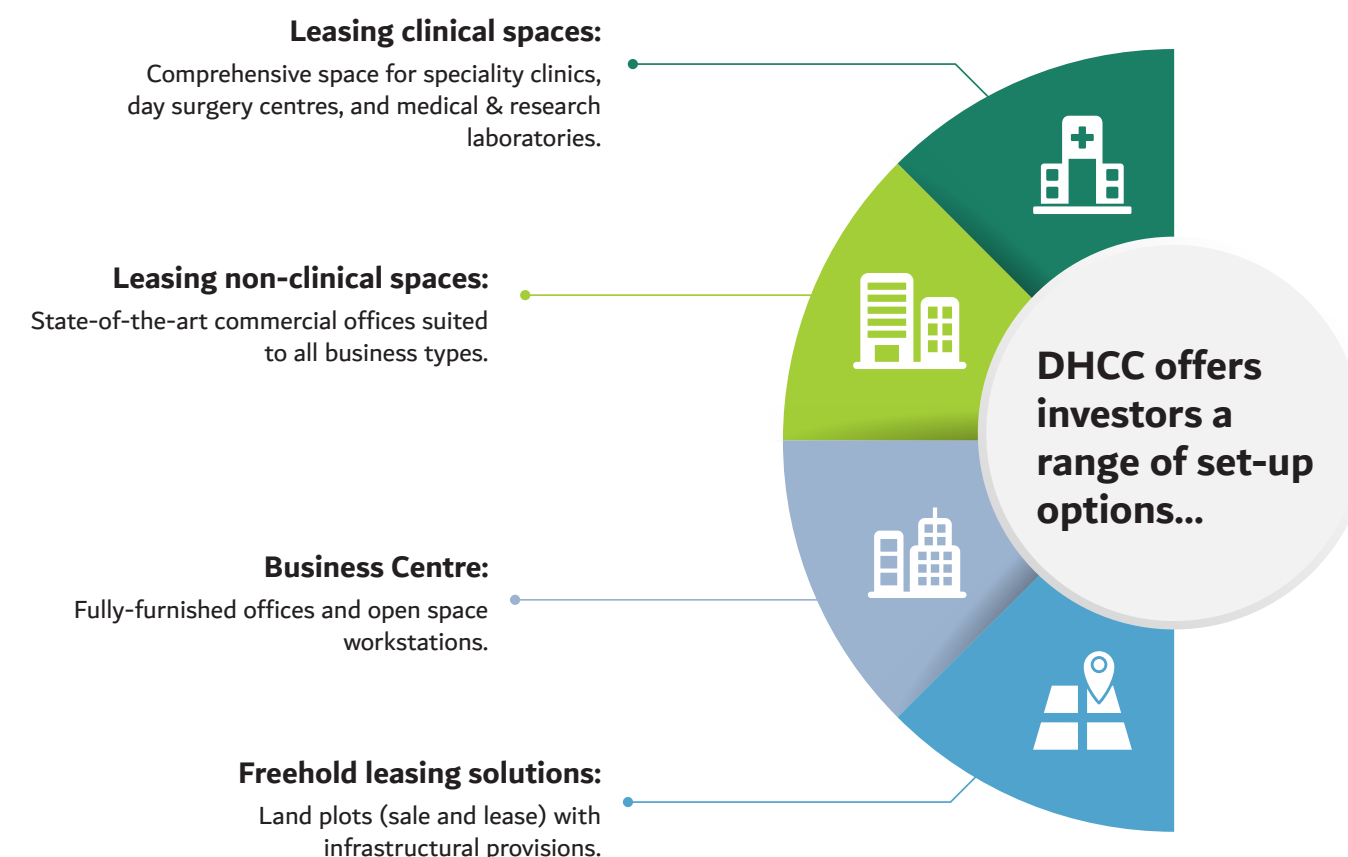
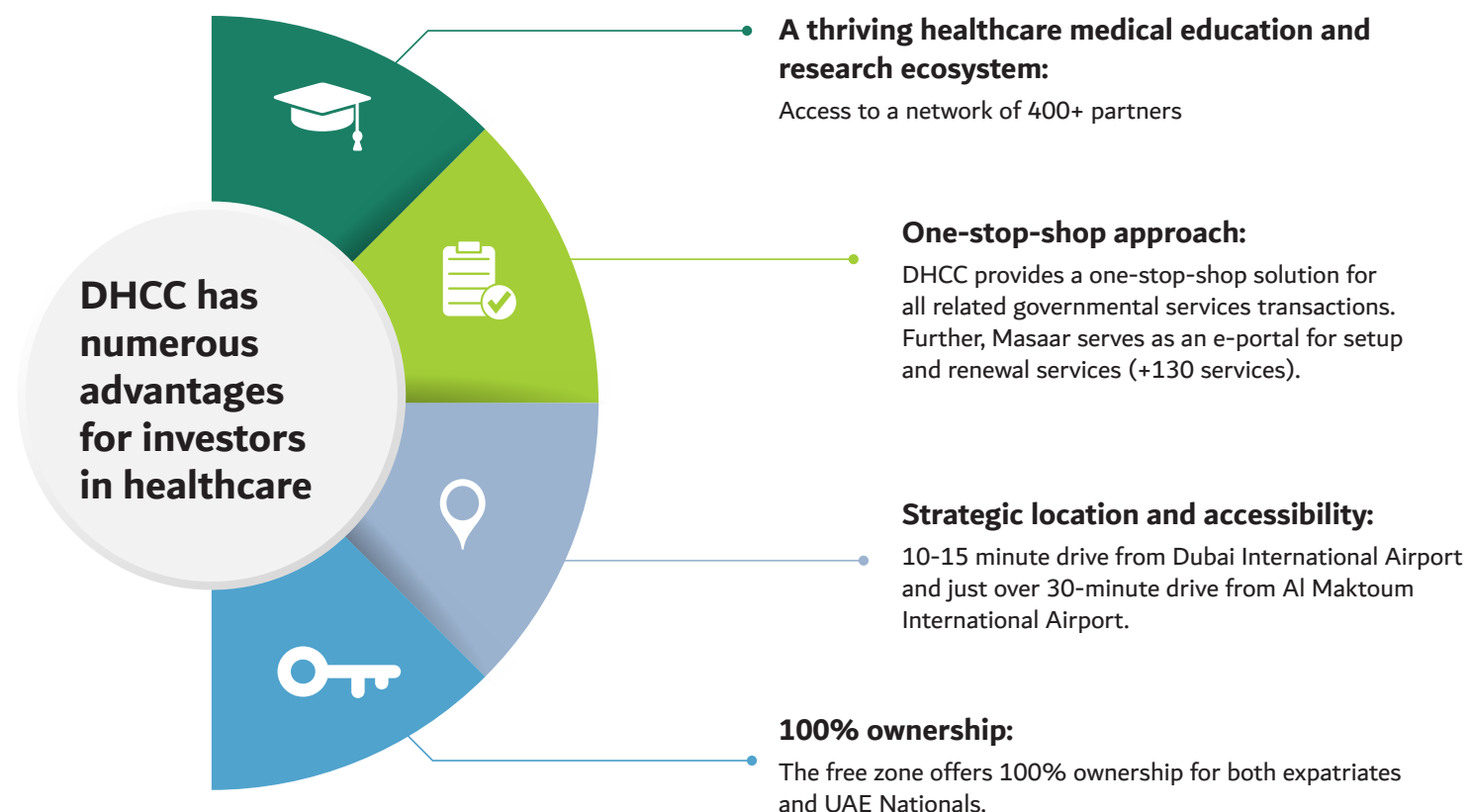
DHCC – Phase 1

- 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.



...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.

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.



INVESTMENT-CENTRIC IN RELATION TO DHCC:

Setting up a business in Dubai Healthcare City (DHCC) gives direct access to custom-fitted facilities, modern offices or desk space, it brings an unparalleled opportunity to join an established, evolving, flourishing community of excellence in the heart of the Middle East's commercial and medical tourism capital. Dubai is now 6th in the Medical Tourism Association's rankings, backed by a rapidly developing proposition underpinned by enhanced patient safety, global talent delivering world-class health services, and the patient-friendly Dubai Health Experience portal.

With wellbeing high on the national agenda, as a business in DHCC you will also get access to a surging population, with an increasingly ageing demographic who will make up 29% of the country's residents by 2050 and who place great stock in excellence of care and cutting-edge treatments.

DHCC's free zone set-up allows for 100% business ownership, whether with a clinical or non-clinical facility, and set-up couldn't be easier. Thanks to DHCC's commitment to boost efficiencies in line with Dubai's smart cities goals, the three-step registration can be completed online through Dubai Health City Authority's (DHCA) Masaar e-services system. Furthermore, specialists in the medical, scientific, research and technical fields can apply for 10-year residency visas.

DHCC provides investor-friendly regulations and investment models - freehold land sale, leasing, and joint ventures, making DHCC an ideal destination for healthcare providers, education, retail and wellness clusters through a wide-range of investment models - from freehold land sales, leasing and joint ventures with a DHCA expert guiding you step-by-step through the process.

Be a part of the rapidly evolving healthcare hub through easy three-step registration through Dubai Healthcare City Authority's Masaar e-services system, a unique and interactive online system through which services are provided to the members of the free zone community and prospective partners looking to become a part of DHCC.



USEFUL INFORMATION


DHCC: www.dhcc.ae | info@dhcc.ae
DHCR: www.dhcr.gov.ae | info@dhcr.gov.ae
Phone: 800-HEALTH (432584)


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


SOCIAL MEDIA

 @healthcarecity

 @dubaihealthcarecity

 @dubaihealthcarecity

 DHCC2011

 Dubai Healthcare City

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 400 companies, employing over 4,000 professionals in the sciences, energy and environmental sectors.

Designed specifically for the needs of businesses and professionals who work in sciences, Dubai Science Park fosters an environment that supports scientific research, creativity and innovation. By providing ample office and laboratory space, a robust infrastructure and a vibrant community for residents, Dubai Science Park 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. Dubai Science Park 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.

Dubai Science Park Master Plan

Dubai Science Park's latest masterplan comprises of a warehouse complex, a twin-tower office, a laboratory complex, the Villa Lantana residential development, My City Centre Mall, Smart Start Nursery, Foremarke School, Neuro Spinal Hospital and S Hotel, Al Barsha.

Top five business activities at Dubai Science Park:



Key partnerships contribute to a smooth set-up process at Dubai Science Park

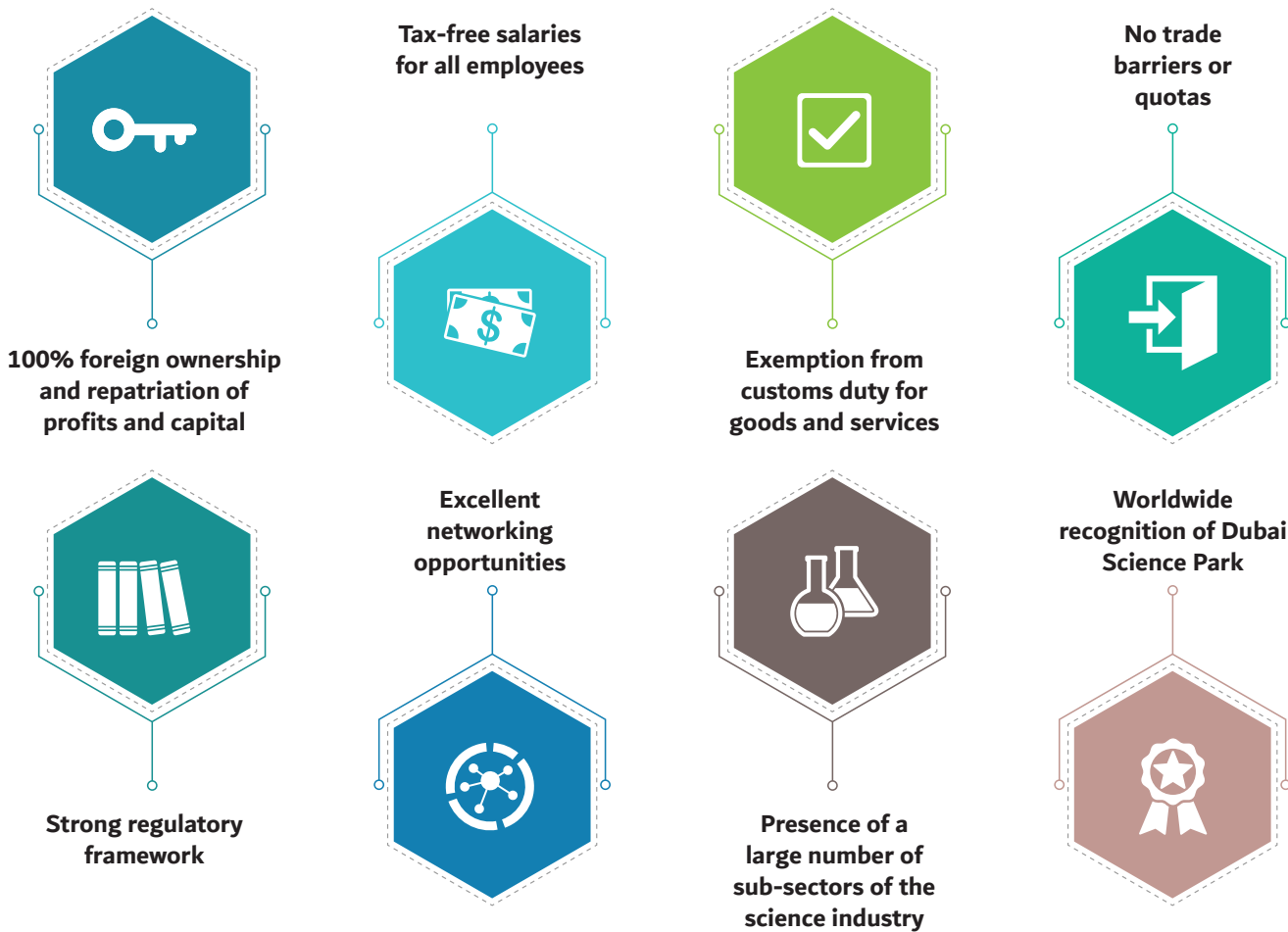
- UAE Ministry of Health.
- The Executive Council.
- Al Jalila Foundation.
- Clean Energy Business Council.
- Dubai FDI.
- Mohammed Bin Rashid University of Medicine and Health Sciences.

“Dubai Science Park has been the ideal location for us. The business district 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

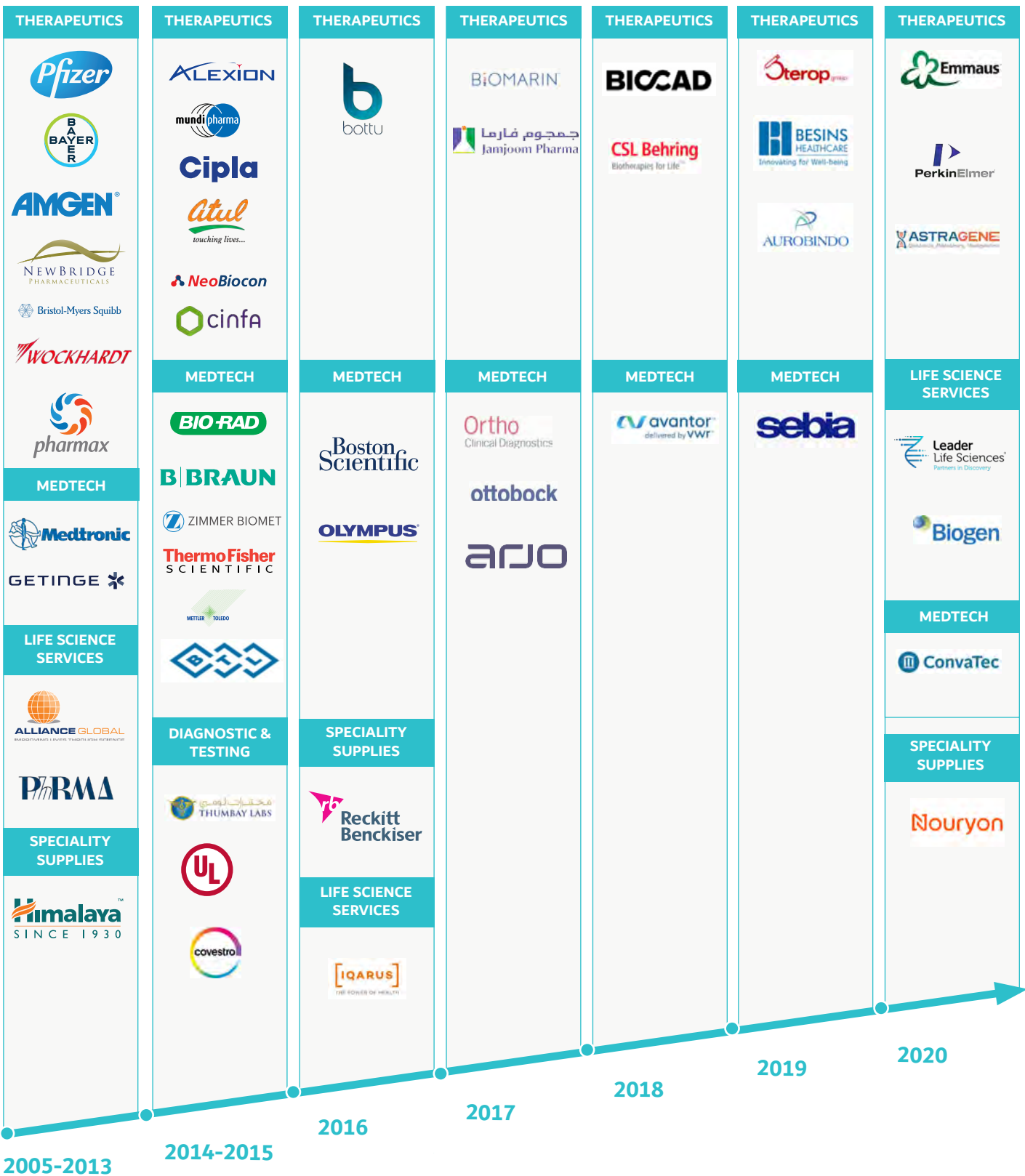
Dubai Science Park has numerous advantages for investors in life sciences and healthcare related sectors



“  Creating an R&D-focused ecosystem that encourages growth and innovation is vital to healthcare. With Expo 2020 Dubai hoping to attract 25 million people this year, the world fair represents an opportunity for the life sciences industry to come together to exchange knowledge and ideas. As a global business district with more than 400 companies and 4,000 people, Dubai Science Park brings together multinational corporations, micro, small and medium-sized enterprises to support the emirate’s sustainable development. With state-of-the-art infrastructure, extensive networks and a favourable regulatory framework, we have been at the heart of the city’s transformation into a global business hub for more than a decade. Our conducive environment offers an easy setup process that acts as a springboard to neighbouring markets and unlocks opportunities. We are committed to strengthening Dubai’s international attractiveness and competitiveness by driving forward its knowledge and innovation-based economy. ”

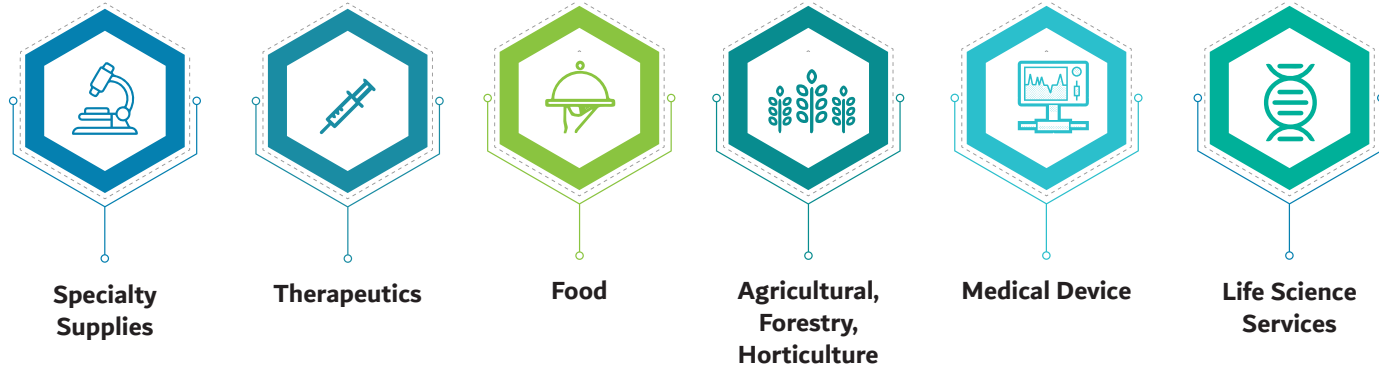
Marwan Abdulaziz Janahi
Managing Director, Dubai Science Park and Chairing Member,
Pharmaceuticals and Medical Equipment Taskforce of the Dubai Industrial Strategy 2030

Dubai Science Park is home to more than 400 companies and 4,000 industry professionals

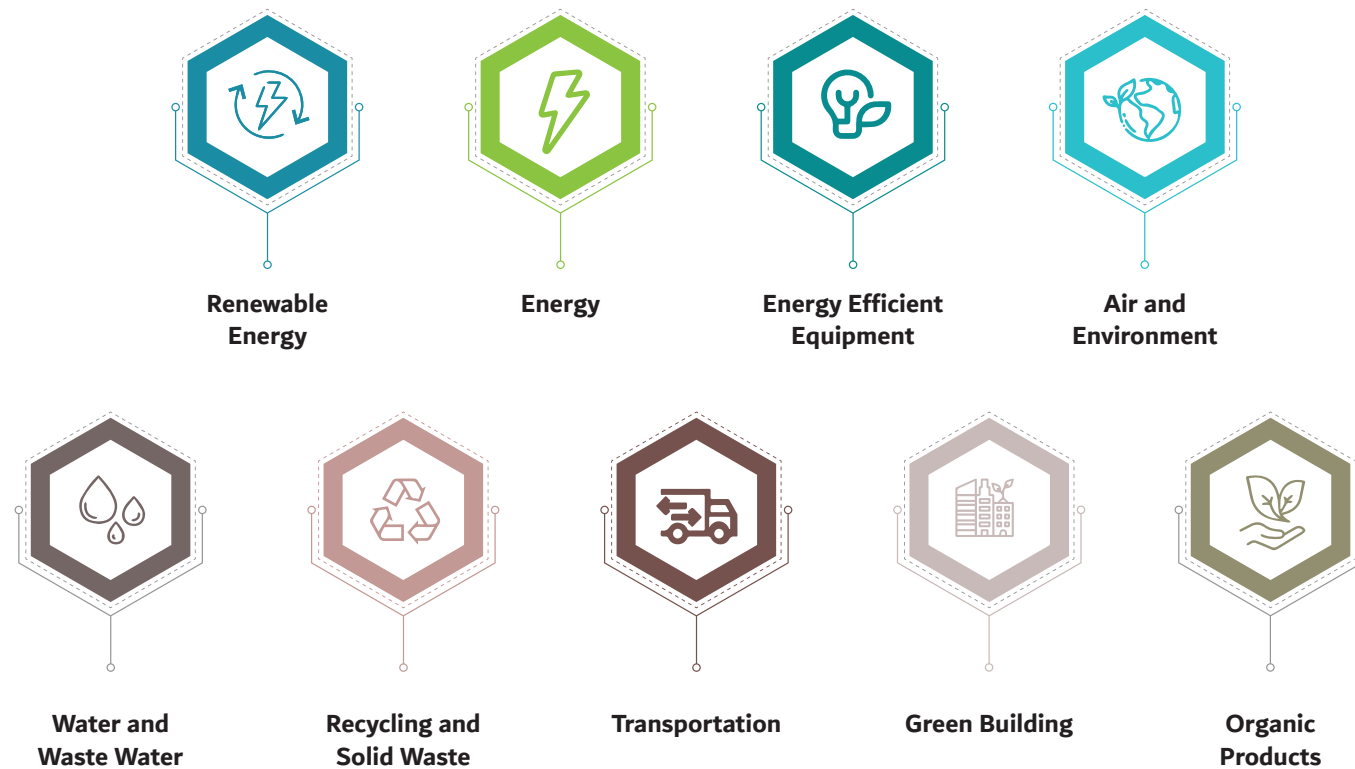


Segments and Activities

Life Science



Energy and Environment



Business Setup & Licensing

Types of legal framework for companies establishing in Dubai Science Park:

Free Zone Branch (Branch of existing company abroad or locally).

Free Zone Limited Liability Company (LLC) with corporate structure.

Free Zone LLC with natural person shareholders.

Free Zone LLC with both corporate and natural person shareholders.

Registration Requirements: <https://dda.gov.ae/dda-services/registration-licencing-services/setting-up-a-business-2/>.

USEFUL INFORMATION

www.dsp.ae | info@dsp.ae Phone: +971 4 390 2222

SOCIAL MEDIA

@DxbSciencePark

KEY POINTS OF CONTACT

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Amy Elaskary, Marketing Manager | +971 4 568 3514 | Amy.Elaskary@dham.ae



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. Dubai Science Park 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 Dubai Science Park has fostered collaboration with different healthcare authorities to allow us to reach our goal of transforming healthcare. The leadership team at Dubai Science Park 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

Health Tourism in Dubai



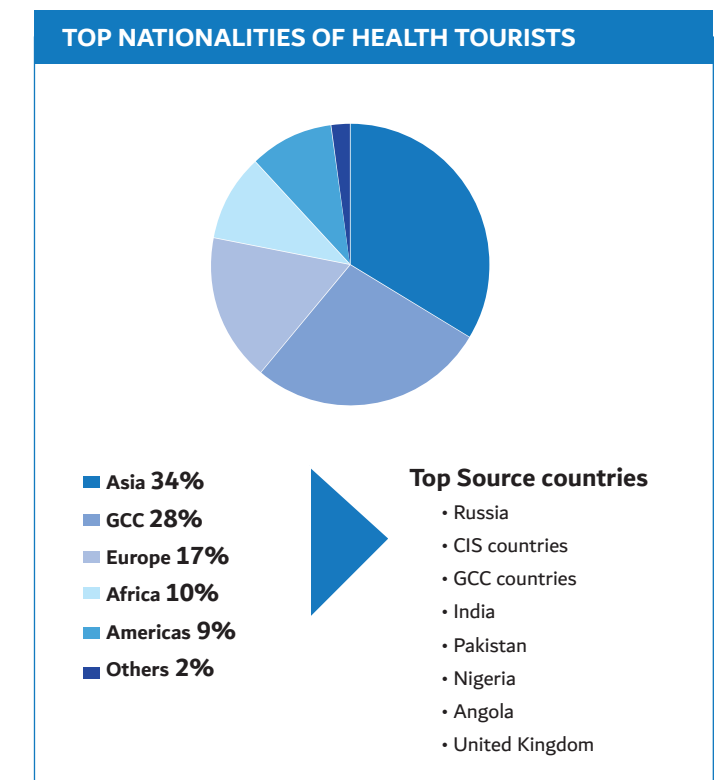
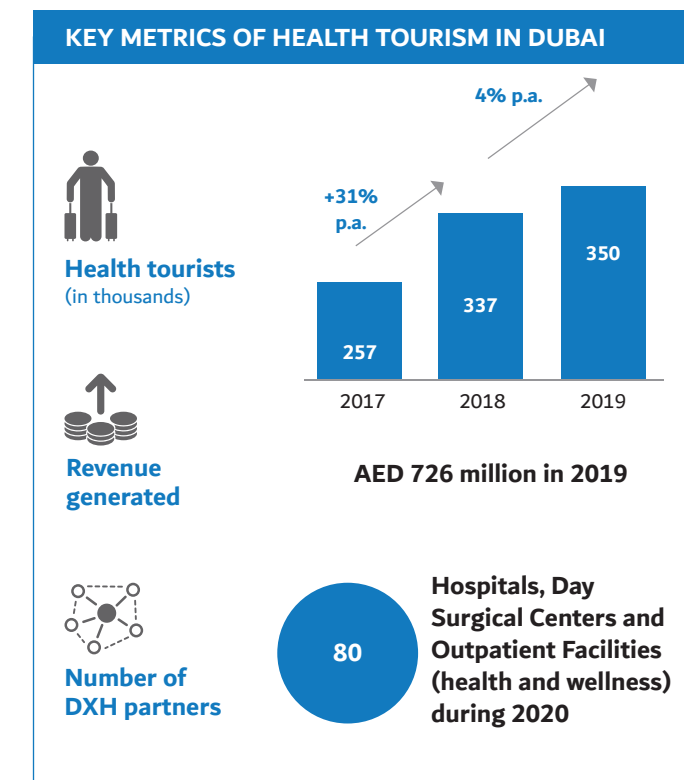
Dubai Health Experience (DXH) was launched by HH Sheikh Hamdan bin Mohammed bin Rashid Al Maktoum, Crown Prince of Dubai and Chairman of the Executive Council, as a continuation of 'Dubai, a Global Destination for Medical Tourism.

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 health tourists. DXH today embraces more than 80 of Dubai's leading healthcare providers. 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 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. Dubai offers a range of healthcare facilities including medical spas, integrated health and alternative treatment centres, such as homeopathy, ayurveda etc.

DXH.ae is the official website for "Dubai Health Experience" that allows visitors seeking treatment in Dubai one platform that is easy to access for information to a seamless journey.

Snapshot of Health Tourism in Dubai



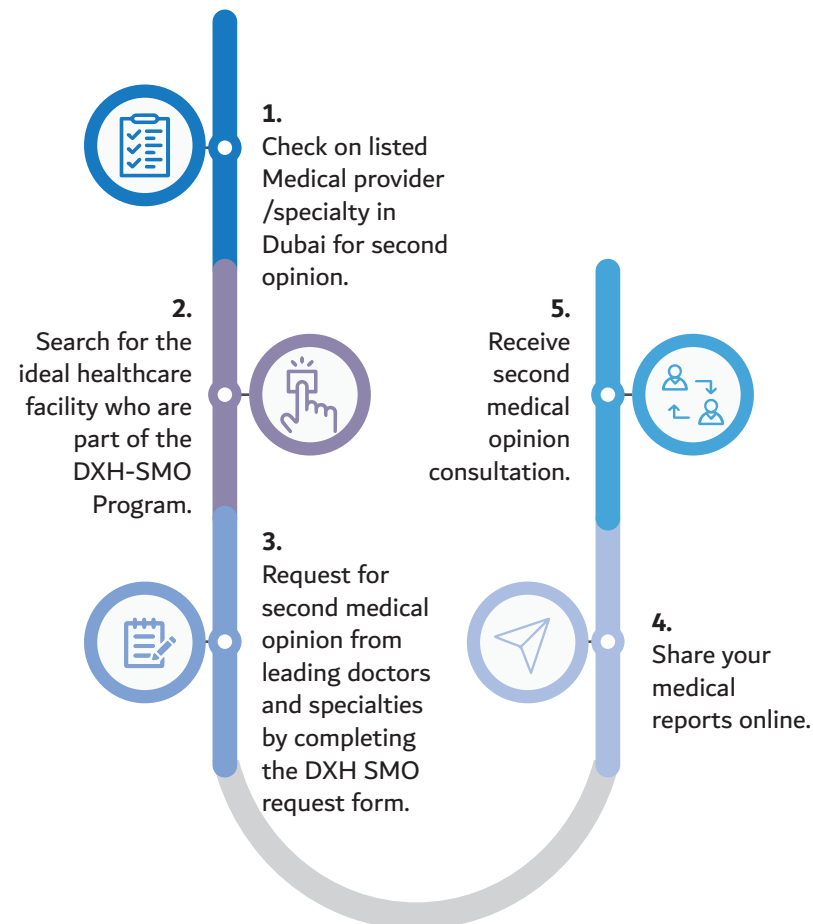
“Dubai is fast gaining the reputation of being a highly preferred destination of choice for medical tourism purposes. This can be attributed to the emirate's ability to provide world-class patient care combined with the state-of-the-art treatment methodologies, healthcare diagnostics, medical infrastructure and technology present in the area.”

Mr. Mohamed Almheiri ,
Director , Health Tourism Department,
Dubai Health Authority

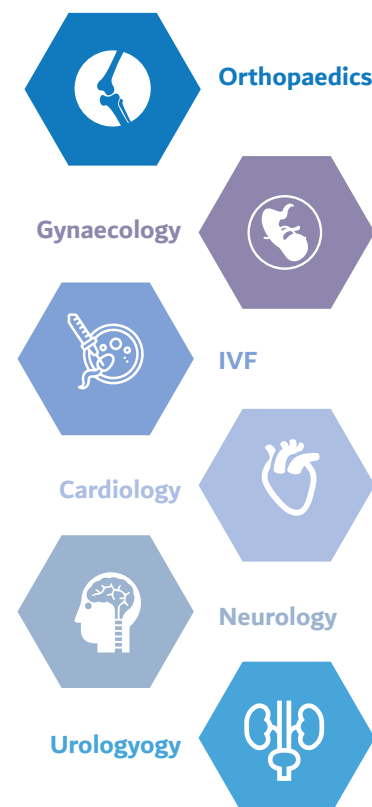
DHA has created a comprehensive health tourist journey to ensure that they enjoy the best possible experience in the city



Second Medical Opinion - DXH - SMO Patient Journey



SPECIALITIES FOR DXH - SMO



Dubai is a recognised hub for health tourism

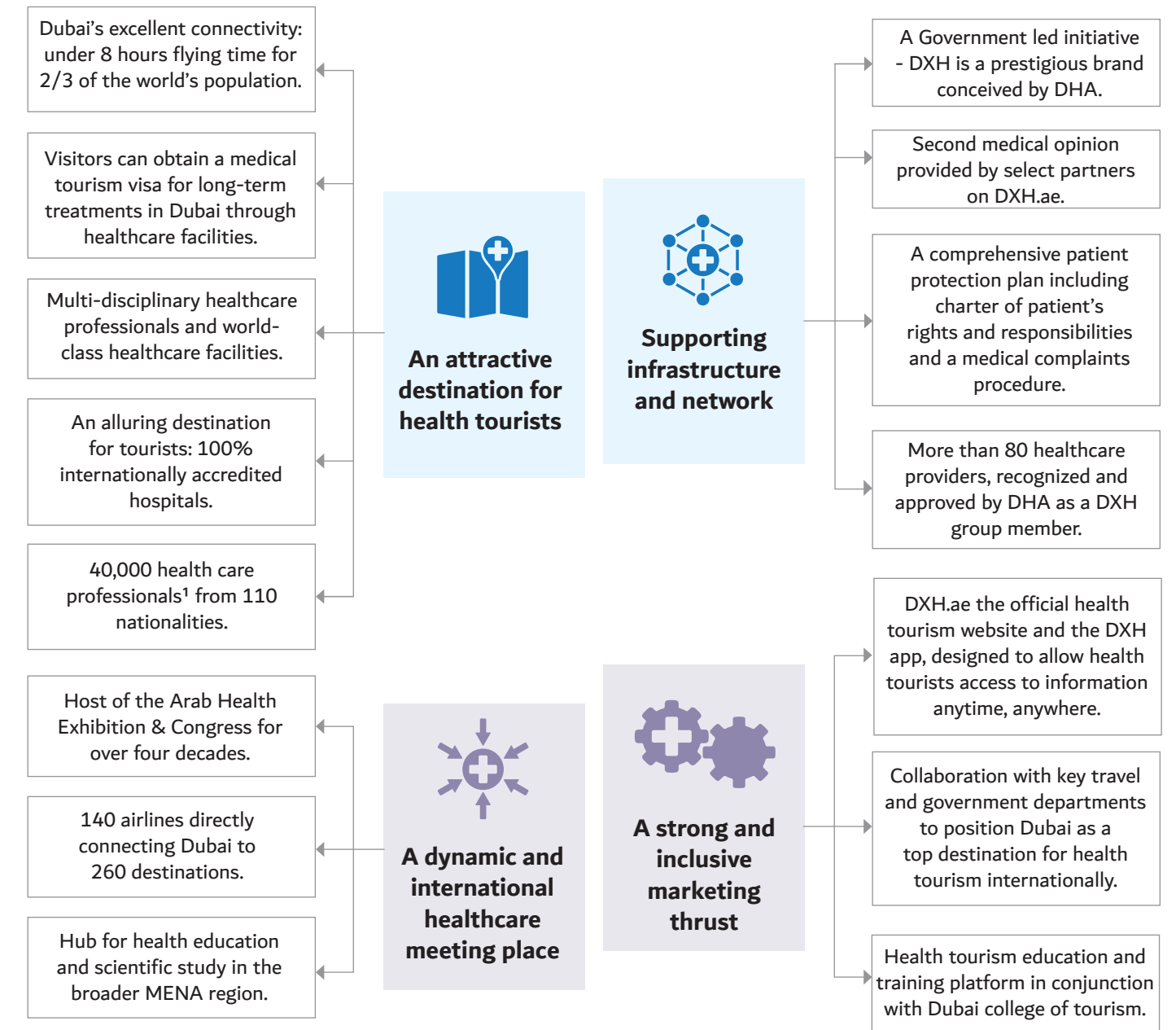


UAE is **ranked #1** in the number of internationally accredited establishments by the Joint Commission International with 196 healthcare facilities



Dubai is **ranked #6** globally and **#1 in GCC**, among attractive medical travel destinations, in the Medical Tourism Index 2020-2021

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



1. DHA Annual Health Statistics 2019

USEFUL INFORMATION

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

KEY POINTS OF CONTACT

Health Tourism Department | 800342 | medicaltourism@dha.gov.ae

Dubai is the Host City for Expo 2020



Dubai will host the 2020 World Expo between 1 October 2021 and 31 March 2022, after the event was postponed due to the pandemic. Nevertheless, this will be 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.



OPPORTUNITY

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



MOBILITY

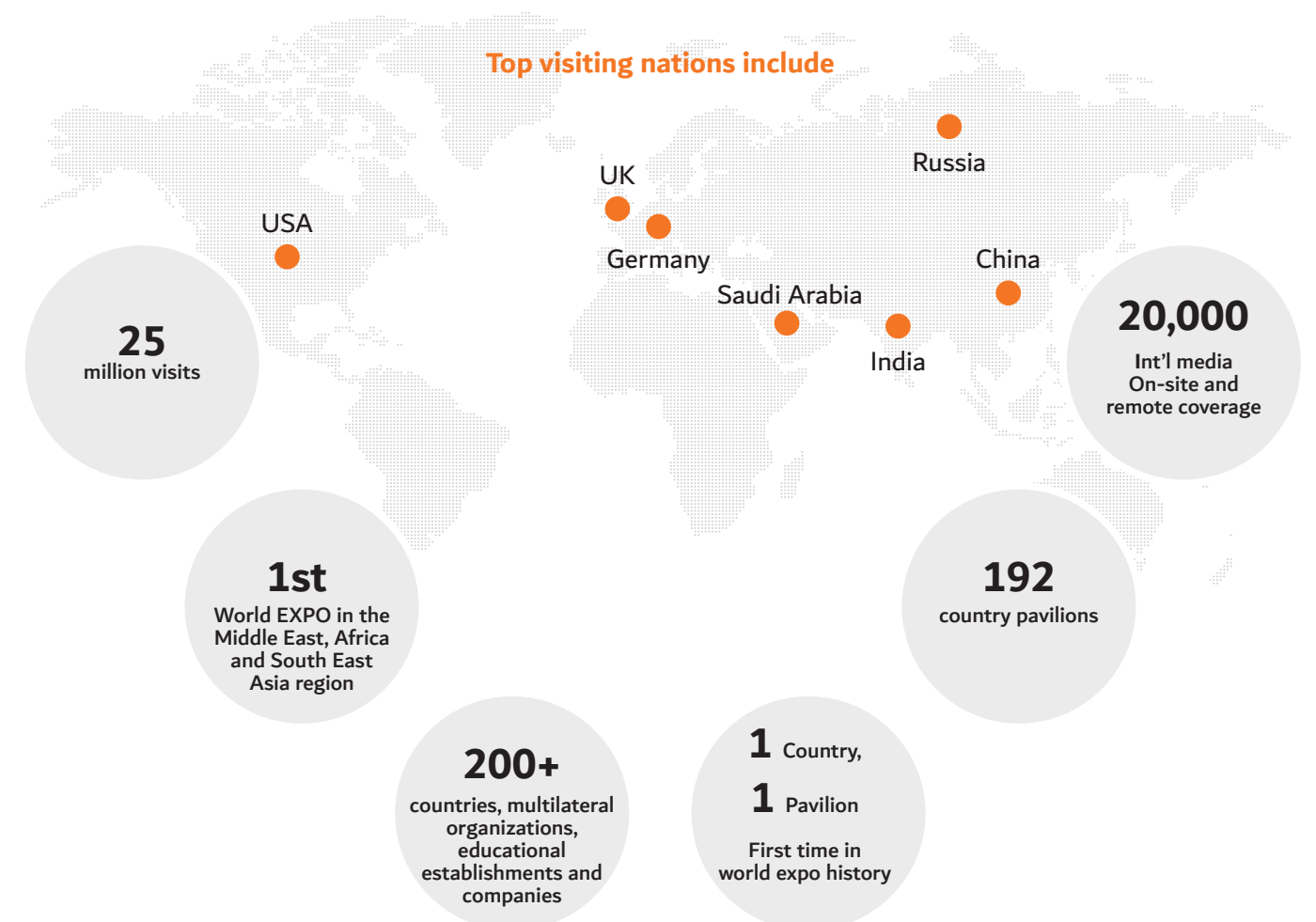
How can we access people and resources to achieve that potential?



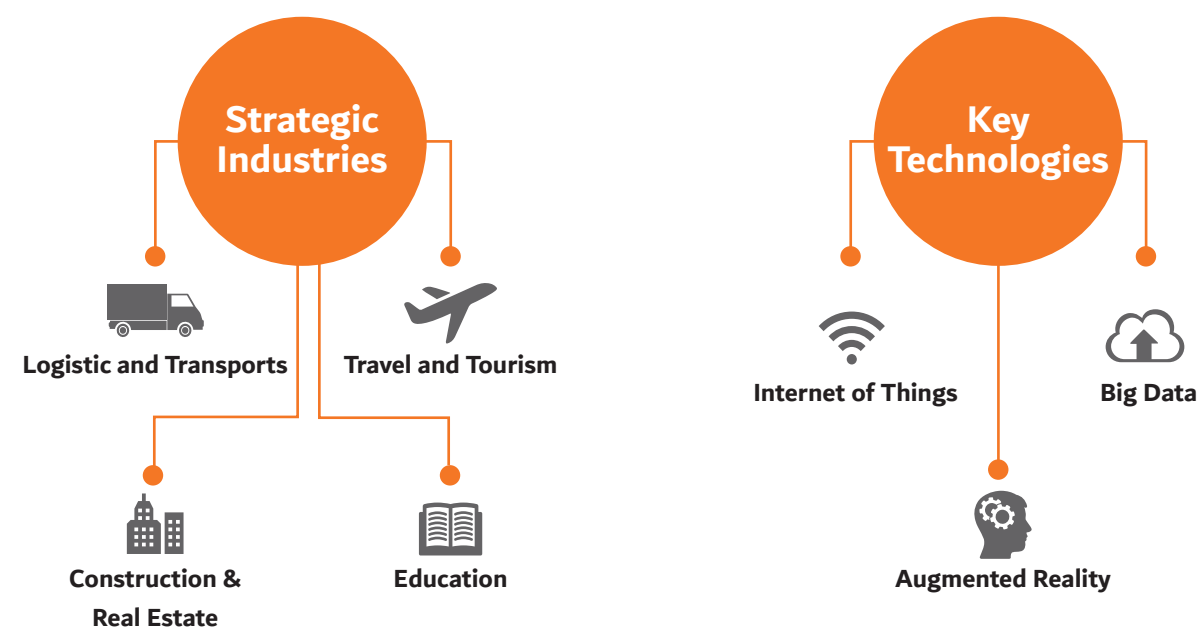
SUSTAINABILITY

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

Snapshot of Expo 2020 Dubai



An ecosystem to connect, create and innovate



Where countries, corporations and organisations meet



Expo 2020 Dubai will also address Healthcare and other related sectors

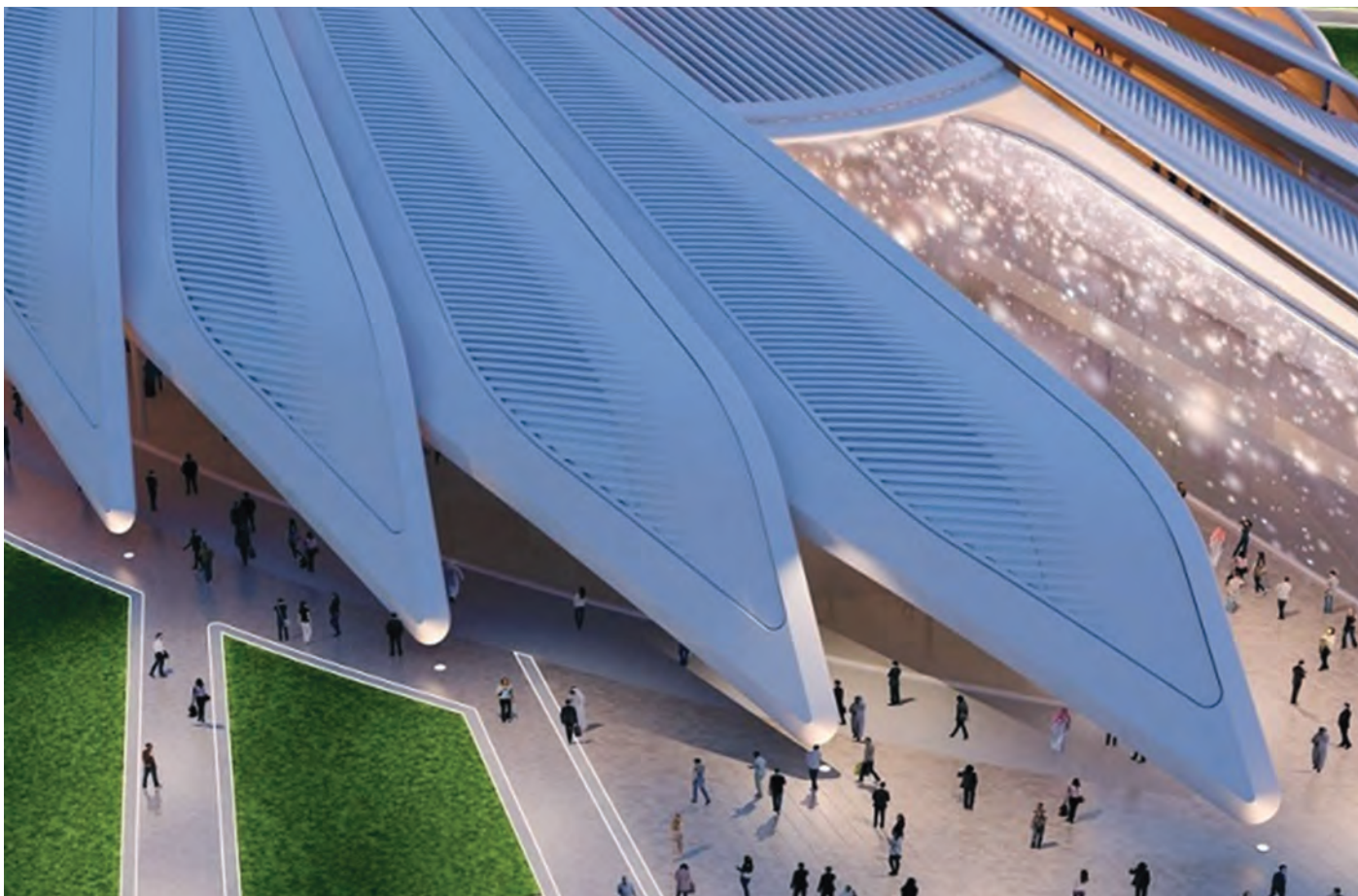


The Expo 2020 Dubai site will showcase innovation, encourage collaboration and celebrate human ingenuity

As the world slowly begins to emerge from the impact for the Covid-19 pandemic, Dubai’s Expo 2020 represents a chance for a wider reset and an opportunity for our civilisation to set out a better and greener future. The themes of the Expo, Opportunity, Mobility and Sustainability could not be more pertinent in today’s world. The Expo event itself embodies everything Dubai stands for and exudes: innovation, dynamism and forward thinking.

Even the 438 hectare site has been meticulous designed, with sustainability and a legacy at the heart of its layout and user experience. 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 master plan for Dubai South, incorporating Al Maktoum International Airport, which is set to be the world’s largest airport when it opens in the 2030’s, as well as five other distinct districts allowing for commercial and residential development, a logistics hub and business park, an aviation district and a golfing district.



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

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.

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.

USEFUL INFORMATION

Dubai Future Accelerators:
www.dubaifutureaccelerators.com

Dubai Future Foundation:
www.dubaifuture.gov.ae

KEY POINTS OF CONTACT

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Future Team Leader | kaialali@dha.gov.ae

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



8 cohorts have graduated
from the Future Accelerators
programme

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 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 Googlepartnered 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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Dubai Health Investment Guide 2021 | Expo 2020 Dubai

The Dubai Health Investment Guide 2021 has been developed as part of DHA Strategy 2016-2021 and its Investment and PPPs 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:



هيئة الصحة بدبي
DUBAI HEALTH AUTHORITY

Investments & PPPs Department

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