مكتب أبوظبي للاستثمار
ABU DHABI INVESTMENT OFFICE

Discover

HEALTHCARE

investment opportunities in Abu Dhabi

investinabudhabi.gov.ae

Healthcare built on a foundation of technology and innovation

Abu Dhabi is expanding the use of research and innovative technologies within its healthcare systems

Provision of care

Establishment of clinics and hospitals

Technology-enabled healthcare system

MedTech

Development, production and commercialisation of medical devices used for diagnosis, testing, therapy and treatment support

Biopharmaceuticals

Hub for research and development to discover, develop, produce and launch new drugs

Discover Abu Dhabi’s world-class healthcare sector

World-class facilities

- Abu Dhabi is home to world-renowned medical facilities and clinics such as Cleveland Clinic, Mayo Clinic, John Hopkins; and leading research laboratories including ICL Diabetes Centre, Khalifa University and G42
- The emirate has four major universities in healthcare within the top 300 in QS Rankings, including two medical schools
- It is host to the world’s first health information exchange across all facilities and hospitals with digital, financial and notification systems
- Abu Dhabi has a unique, vibrant and growing healthcare ecosystem with more than 5,200 beds, 60 hospitals and 944 medical centres

Enabling support

- Large availability of investment capital as Abu Dhabi is home to three of the largest sovereign wealth funds globally and accounts for 60% of the UAE’s investable wealth
- Large investment in the human genome programme and biological data repository based on extensive COVID-19 testing
- First in the region to introduce mandatory insurance for all Abu Dhabi residents in 2006, achieving 98% coverage by 2016

Growing demand

- The growing prevalence of chronic diseases (diabetes, cancers and genetic disorders) and emerging support for PPPs in the UAE are creating opportunities for the emirate's healthcare industry
- Abu Dhabi is within the top ten on the global medical tourism index and is second within the GCC region

Abu Dhabi has emerged as a healthcare leader

The development of new initiatives has seen the healthcare sector grow in leaps and bounds, priming it for long-term success

2018

Medical schools

Khalifa University launched its College of Medicine and Health Sciences and established bioengineering and health research laboratories

جامعة خليفة
Khalifa University

Healthcare investment masterplan

The Department of Health (DoH) developed a healthcare masterplan to guide investors in Abu Dhabi

دائرة الصحة
DEPARTMENT OF HEALTH

2019

Access to data

The DoH launched the first Arab Genome Project

دائرة الصحة
DEPARTMENT OF HEALTH

Artificial Intelligence (AI)

The DoH launched its Artificial Intelligence Lab to develop healthcare solutions through technologies like AI, IoT, blockchain, genomics and predictive analytics

دائرة الصحة
DEPARTMENT OF HEALTH

AI collaboration

The DoH signed an MoU with Saal.ai for AI collaboration

saal.

Access to data

The DoH launched its health information exchange programme, Malaffi, to integrate technological transformation in healthcare

دائرة الصحة
DEPARTMENT OF HEALTH

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Healthcare incubator

The DoH partnered with incubator Plug and Play to support healthcare startups

PLUGANDPLAY

Central Chronic Diseases Registry

The DoH announced the establishment of the Abu Dhabi Chronic Diseases Registry to monitor the prevalence of those diseases in the emirate

DEPARTMENT OF HEALTH

2020

Healthcare upskilling platform

The DoH launched the "Health Workforce Upskilling Platform", an online training platform that develops the skills of healthcare professionals dealing with the COVID-19 pandemic

DEPARTMENT OF HEALTH

Healthcare licences

The DoH launched a set of initiatives to speed up the process of obtaining medical licenses to ensure the health and safety of the community

DEPARTMENT OF HEALTH

2021

Genetics lab

G42 launched Omics Centre of Excellence, a genetic lab to screen the entire Emirati population within months using the region's largest and fastest supercomputer

G42

Health facilities

More than AED 10b investment in health facilities, including attracting world-renowned clinics such as Mayo and Cleveland, and established multiple research centres

MAYO CLINIC

كليفلاند كلينك أبوظبي
Cleveland Clinic Abu Dhabi

Abu Dhabi's well-established healthcare infrastructure

Then emirate has developed the capacity to cater for a growing demand for healthcare services

Improved capacity

2.5 beds per 1k population in 2011

3.9 beds per 1k population in 2016

20.4 physicians per 10k population in 2011

44.9 physicians per 10k population in 2019

43.6 nurses per 10k population in 2011

97.03 nurses per 10k population in 2019

New infrastructure

1354 facilities (1191 private) in 2011

2455 facilities (2283 private) in 2016

Universities with research labs

Four major universities in healthcare within the top 300 in QS rankings, including 2 with medical schools

Access to specialised care

150 specialties in 2011

502 specialties in 2019

New technologies

- Health Information Exchange
- Establishment of the AI Lab and AI adoption in the healthcare system
- Telehealth Enablement across the sector
- E-records and e-claims

Abu Dhabi is home to world-class MedTech solutions

Abu Dhabi's focus on expanding its healthcare system, adopting innovative technologies and forging partnerships with leading international hospitals has led to a flourishing MedTech sector

Telemedicine

- The Abu Dhabi Telemedicine Centre offers consultations over the phone, in both Arabic and English, 24h/day and 7 days/week
- Cleveland Clinic Abu Dhabi uses telehealth to care for patients in the UAE and connects them to the flagship hospital in Cleveland, Ohio

Medical devices and equipment

- Cleveland Clinic Abu Dhabi and Sheikh Khalifa Medical City boast world-class medical devices and equipment, such as robotic-assisted surgery equipment
- The most common robotics-assisted procedures are cardiac, digestive diseases, urological, and gynaecological procedures. In 2020, the hospital performed the first robotic "whipple" procedures to treat pancreatic and duodenal tumours

Laboratory technology

- The National Reference Laboratory offers approx. 4,700 specialised medical diagnostic tests to local and regional healthcare providers
- In June 2020, G42 announced that the development of a new population scale technology is being incorporated into the UAE's national testing strategy and is expected to scale testing to hundreds of thousands of samples daily

Abu Dhabi is home to world-class MedTech solutions (cont.)

Abu Dhabi's focus on expanding its healthcare system, adopting innovative technologies and forging partnerships with leading international hospitals has led to a flourishing MedTech sector

Electronic medical records

- Malaffi is the region's first Health Information Exchange platform that securely connects all public and private healthcare providers in Abu Dhabi. After just one year, Malaffi is recognised as one of the fastest HIE implementations globally, connecting 600 healthcare facilities, providing access to 26k+ users and 107m clinical records for 4 million patients.

3D printing

- The UAE is embracing the power of 3D printing as it is part of its national healthcare strategy
- NYU Abu Dhabi started collaborating with Mubadala Healthcare to create 3D printed N-95 masks that are more environmentally friendly while still providing the same level of protection against COVID-19 and other diseases

Internet of Medical Things (IoMT)

- Abu Dhabi has recognised IoMT as the technology to improve the management of chronic diseases, which are prevalent in the UAE
- It has also demonstrated the ability to use IoTM during the pandemic as remote monitoring devices have helped monitor patients in a non-hospital setting and health authorities have used smart wristbands to track patients as they self-quarantine at home

Abu Dhabi is the GCC’s hub for biopharmaceuticals

Goals & vision

- Abu Dhabi vision 2030 sees the pharmaceutical industry as one of the main sub sectors to develop, considering its future growth prospects, export potential and mid- to long-term economic impact
- The Abu Dhabi Government is focused on minimising its reliance on imported pharmaceuticals. The UAE is estimated to have imported around AED 14.9b of pharmaceutical products from the world market in 2018. Local manufacturing of pharmaceuticals is now a primary goal for the government, the Ministry of Health and legislating authorities

Market trends

- Universal healthcare has been rolled out, creating a myriad of opportunities for biopharmaceuticals to cater to the country’s growing population
- The proliferation of non-communicable lifestyle diseases means that the country’s medical needs will continue to grow in the coming years

Abu Dhabi is the GCC’s hub for biopharmaceuticals (cont.)

Market players

- The pharmaceutical market is led by Julphar Gulf Pharmaceutical Industries - the largest generic pharmaceutical manufacturer in MENA, followed by leading domestic pharmaceutical companies - Medpharma, Pharmax, Neopharma and Global Pharma
- Abu Dhabi currently has 880 outpatient community pharmacies licensed in the emirate in addition to 77 licensed drug stores

Recent developments

- In August 2020, Mubadala acquired a majority stake in PCI Pharma Services, a pharmaceutical and biopharmaceutical global supply chain solutions provider from the early stages drug development through to commercial launch and delivering ongoing supply with global capabilities for drug development and manufacturing, clinical trials services and commercial packaging services
- In January 2021, ADQ acquired Pharmax Pharmaceuticals, a UAE-based generic drugs manufacturer, to help provide more cost-effective medications to the emirate
- In the same month ADQ acquired a minority stake in India's Biocon Biologics to boost expertise in high-quality biosimilars to target chronic conditions such as diabetes, oncology and immunology

Abu Dhabi leads the way in clinical studies

Key facts

There are 67 active clinical studies in the UAE, 50% of which are taking place in Abu Dhabi

Abu Dhabi has experience in conducting clinical trials in phases 2, 3, 4 and 5 and past marketing

Current Abu Dhabi Investments:

Centralised bio-bank and sequencing for COVID-19

The only biosafety lab level 4 in the region is in construction

Abu Dhabi Centre for Research and Innovation is under operational setup

Plans with leading providers for two cellular therapy centres

Cardio-vascular disease

- Mean age of Coronary Artery Disease (CAD) **10** years younger in Middle East than worldwide
- **36%** of deaths in UAE caused by cardiovascular disease

Diabetes

- One of the fastest growing diseases worldwide with global prevalence of diabetes expected to rise from **4%** in **2000** to **7%** in **2050**
- **17-18%** of UAE adult population affected by Diabetes

Obesity

- Prevalence of obesity among Middle East adults nearly tripled since **1975**
- UAE **12%** obesity rate, **2x** world average

Cancer

- Cancer cases expected to double in the Middle East by **2030**
- **4,500** new cases of cancer reported in UAE each year

Genetic Disorders

- UAE ranked **5th** among **193** countries in terms of prevalence of birth defects
- **400+** genetic diseases in UAE and **~1%** of babies born with birth defects, mostly of genetic origin

A best-in-class business environment

Abu Dhabi's focus on a transparent regulatory system and government support provides the ideal foundation for success

Regulatory framework

Incentive programmes

Regulatory:

- The Department of Health is the region's leading regulator with best-in-class licensees and quality standards
- Centralised institutional review board committee **with 7-day response time on new proposal.** This timeline is among the fastest in the world today

Intellectual Property (IP):

- In Sep 2020, the Ministry of Health & Prevention issued Ministerial Decree 321 of 2020 (Decree 321), an important measure protecting IP rights for pharmaceutical companies. The new measure relates to the use of clinical and preclinical data and information regarding innovative pharmaceutical products registered in the UAE
- The UAE is acknowledged worldwide for its recognition and protection of IP rights, including through its membership of specific global IP protocols and conventions (including the Madrid Convention, TRIPS and the Patent Cooperation Treaty 1970)
- UAE Federal Law acknowledges and recognises a broad range of IP forms and rights, and reflects these in a manner that is similar to those that are found within US, European and UK intellectual property law systems
- Patents, trademarks, trade names, copyrights and confidential information are all protected in the UAE

Insurance coverage:

- First in the region to introduce mandatory insurance for all Abu Dhabi residents in 2006

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Incentive programmes

Abu Dhabi incentive programmes

- Abu Dhabi has various **incentive programmes** that provide the tools required to establish a **level playing field** for healthcare institutions to compete locally, regionally and internationally
- **Rebates offered** include medical and laboratory equipment, research and development costs, IP costs, rental and employee costs among others
- **Funding available** for fundamental research and development in healthcare and life science services
- **Access to key ecosystem partners** to enable growth and recruit talent and **direct contact** with key government bodies **to obtain required licences** to do business in the UAE

Public Private Partnership (PPPs)

- Rising emergence and support for PPPs in Abu Dhabi include investments in healthcare

Golden Visa

- Golden visas available for doctors and researchers in the healthcare sector

Healthcare opportunities for investors in Abu Dhabi

- Become an anchor investor of the healthcare industry in Abu Dhabi
- Headquarter your healthcare startup in Abu Dhabi
- Set up manufacturing plant for your latest healthcare innovation
- Invest in local healthcare startups
- Establish a research and development partnership between entities in Abu Dhabi and your home country
- Set up your distribution and supply regional headquarter in Abu Dhabi to serve the GCC region
- Establish a health research and innovation centre in Abu Dhabi
- Develop a healthcare incubator or accelerator in Abu Dhabi
- Invest in ADX-listed healthcare entities

You have the opportunity to tap into Abu Dhabi's fast-growing medical tourism market, partake in its healthcare R&D and make the emirate your platform for regional expansion.

Abu Dhabi has a vibrant healthcare ecosystem

Hospitals

- Moorfields Eye Hospitals UAE – A branch of Moorfields London
- MAYO CLINIC
- هيلث بوينت Healthpoint – A Mubadala Company
- SEOUL NATIONAL UNIVERSITY
- كليفلاند كلينك أبوظبي Cleveland Clinic Abu Dhabi
- ميديكلينيك MEDICLINIC
- مستشفى كينغز كوليدج لندن King's College Hospital London
- UMEDICAL
- nmc health
- SEHA صحة – Abu Dhabi Health Services Co.
- JOHNS HOPKINS MEDICINE

Research, labs and pharmaceuticals

- مركز العاصمة للفحص الصحي Capital Health Screening Centre – Brought to you by Mubadala Healthcare
- AstraZeneca
- Julphar الخليج للصناعات الدوائية Gulf Pharmaceutical Industries
- مركز إمبريال كوليدج لندن للسكري IMPERIAL COLLEGE LONDON DIABETES CENTRE
- ADI
- Aster PHARMACY – Much More Than Medicines
- LIFE
- المختبر المرجعي الوطني National Reference Laboratory – Managed by LabCorp
- PHARMALINK
- neopharma
- PLANET PHARMACIES
- Health First PHARMACY

MedTech and startups

- medgate
- algocyte
- metromed – great brands for better health
- Honeywell
- aumet
- SIEMENS
- مركز أبوظبي للتطبيب عن بعد Abu Dhabi Telemedicine Centre – A Mubadala Company
- CardioDiagnostics
- helium health
- G42
- WeWALK
- NAFAS نفس

Government entities

- UNITED ARAB EMIRATES MINISTRY OF HEALTH & PREVENTION
- مكتب أبوظبي للاستثمار ABU DHABI INVESTMENT OFFICE
- ADVANCED TECHNOLOGY RESEARCH COUNCIL
- KIZAD مدينة خليفة الصناعية KHALIFA INDUSTRIAL ZONE
- دائرة الصحة DEPARTMENT OF HEALTH
- Masdar – A MUBADALA COMPANY
- ABU DHABI GLOBAL MARKET سوق أبوظبي العالمي
- ZonesCorp
- جامعة أبوظبي ABU DHABI UNIVERSITY

Investors

- ADQ القابضة
- ADIA
- MUBADALA

Education

- جامعة خليفة Khalifa University
- UAEU
- كليات التقنية العليا HIGHER COLLEGES OF TECHNOLOGY
- جامعة العين AL AIN UNIVERSITY
- جامعة زايد ZAYED UNIVERSITY
- كلية الإمارات للتكنولوجيا Emirates College of Technology
- INSEAD

Accelerators

- HUB71
- FLAT6LABS
- PLUGANDPLAY

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Thank you

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