



HEALTHCARE SECTOR IN QATAR

CURRENT STATE ASSESSMENT SERIES

2021



QDB

بنك قطر للتنمية
QATAR DEVELOPMENT BANK

CEO'S MESSAGE



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As part of Qatar's efforts to develop its private sector and bring progress to the country's Entrepreneurship, SME, and Innovation Ecosystems towards the realization of its national vision for 2030, Qatar Development Bank (QDB) continues to advance its role as the Entrepreneur's and SME's growth partner from ideation to fruition.

QDB continues to make strides in its transformation and reinvention journey while meeting the aspirations of Qatari business owners throughout their journey with a multitude of symbiotic initiatives and growth platforms that perpetually expand possibilities for forward-looking SMEs and entrepreneurs and empower them to play an even bigger role in Qatar's transformation into a diversified knowledge-based economy and a global leader in business and innovation.

In line with its objectives to establish reliable data and analysis as a prerequisite for the formation of new ventures on a sound and viable business basis, and extend meaningful support to Qatari entrepreneurs. QDB has published a series of five current state assessment reports across service sectors. To bring a fresh new outlook on potential services and arms entrepreneurs with relevant information and perspectives that can be leveraged to enter those sectors and their niches with confidence.

This report covers Qatar's overall healthcare ecosystem, market drivers and its regional adoption. As one of the fastest-growing healthcare systems in the world, it is projected to become a US\$7 billion market by 2025, driven by greater private sector contribution, as well as a higher demand for healthcare services, rising incidence of non-communicable diseases and lifestyle-related ailments.

COVID-19 has ensured the rapid digitization of medical services. Qatar is striving to develop best-in-class telemedicine solutions while integrating data analytics across the spectrum and investing in innovative global technologies. Additionally, focused preventive care initiatives, multidisciplinary treatment centers, and long-term and home care services are some of the sector's emerging trends. Meanwhile, an in-the-works health insurance law is expected to lower the cost pressure on healthcare services and introduce medical insurance for expats – in turn, bringing in foreign insurers and boosting demand for private facilities.

Overall, Qatar emphasizes the attainment of a world-class integrated healthcare sector in the QNV 2030. Furthermore, the National Health Strategy 2018-2022 aims at increasing private participation, improving access to quality care, enhancing governance, and promoting healthier living. This translates into high-quality and accelerated medical treatment to patients, effectively cementing the country's position as a preferred healthcare service provider.

I invite readers to go through the report to gain valuable insights and in-depth knowledge and understanding of this sector's prospects.

Abdulrahman Hesham Al Sowaidi
Acting Chief Executive Officer



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03-09-2017
14 24

10cm/hV

Silence
Alarms



x4
AUTO

WBP
Interval



x1

Menu



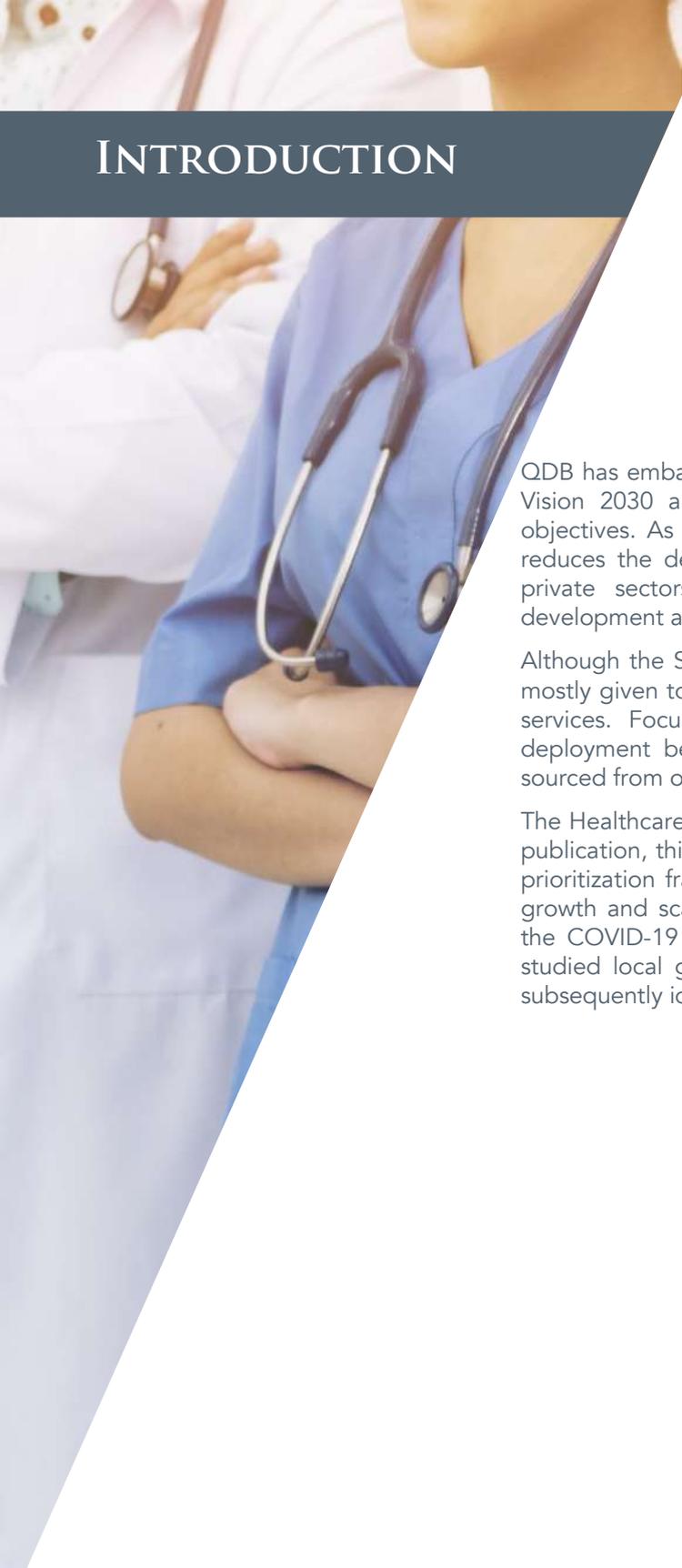
Record



APPENDIX: GLOSSARY OF TERMS

Table 1: Glossary of Terms

AI	Artificial Intelligence
BMI	Body Mass Index
CoEs	Centers of Excellence
CT	Computed Tomography
HER	Electronic Health Record
HGR	Hamad General Hospital
EMR	Electronic Medical Record
GCC	Gulf Cooperation Council
GDP	Gross Domestic Product
GSK	GlaxoSmithKline
HC	Health Care
HGH	Hamad General Hospital
ISIC	International Standard Industrial Classification of All Economic Activities
IT	Information Technology
IV	Intravenous
JCI	Joint Commission International
LTPAC	Long-Term and Post-Acute Care
Mn	Million
MNCs	Multinational Corporations
MoPH	Ministry of Public Health
MRI	Magnetic Resonance Imaging
NHS	National Health Strategy
PSP	Private Sector Participation
QAR	Qatari Riyal
QDB	Qatar Development Bank
QG	Qatari German
QIC	Qatar Insurance Company
QPE	Qatar Pharmacy Establishment
UAE	United Arab Emirates
UK	United Kingdom
US/USA	United States of America
USD/US\$	United States Dollar
WWRC	Women's Wellness & Research Center



INTRODUCTION

QDB has embarked key service sectors on a journey to achieve the National Vision 2030 and the second National Development Strategy 2018-2022 objectives. As a result, to accomplish a diversified economy that gradually reduces the dependence on hydrocarbon industries, enhances the role of private sectors and maintains its competitiveness through sustainable development and localization of services in the state of Qatar.

Although the Services Sector is well-established in the region, preference is mostly given to international service providers, namely for technology-based services. Focused sectors were assessed to highlight the asymmetrical deployment between services that are being offered locally and services sourced from outside.

The Healthcare report is part of the 5 series of the Current State Assessment publication, this subsector was selected following a strict sector filtering and prioritization framework based on presence of local champions, sector size, growth and scalability as well as existence of opportunities emerging from the COVID-19 pandemic. Beyond the assessment of the sector, QDB has studied local gaps in the local market for Healthcare-related services and subsequently identified investment opportunities for new services.



Regulators

The **Ministry of Public Health's** primary responsibilities include setting the national healthcare strategy in line with the state's overall vision, developing specific strategy programmes and identifying necessary oversight and follow-up measures to ensure proper implementation and monitor progress.

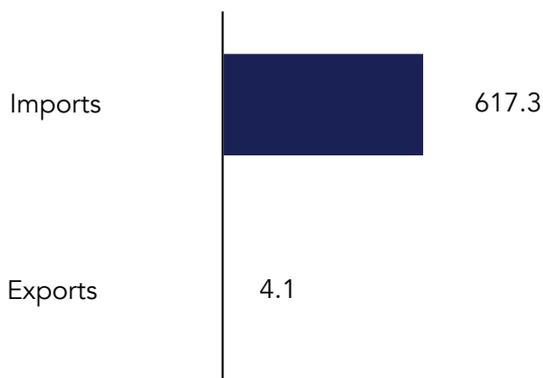
The Ministry also oversees the quality and effectiveness of public and private sector services and public service programmes, such as disease prevention, national immunisation, food safety and others. There are several departments that support the Ministry of Public Health:

- The **Health Promotion Department** develops and implements health promotion policies, action plans and programmes with the aim of reducing the prevalence of non-communicable diseases. It supervises the implementation of the law regulating mental health, tobacco control and others.
- The **Strategy Planning and Performance Department** oversees and monitors the quality and effectiveness of healthcare facilities, ensuring alignment with the best standards. It also supports policy development aimed at improving the quality of healthcare provision.
- The **E-Health Department** supports the state's strategic direction, focused on providing innovative information systems, technologies and digital solutions. It sets the national e-health strategy and its implementation plan, as well as the legislation for the use of electronic/digital solutions, ensuring confidentiality.

Manufacturers

Qatar is highly reliant on imported patented and generic pharma products, with nascent local manufacturing capabilities. However, local players like **Qatar Pharma** and **QLife Pharma** are eager to expand exports. Qatar Pharma is focused on essential medicines and IV solutions. Experts believe niche products will face limited competition, easing regional exports. QLife Pharma is making efforts to initiate the process of obtaining approvals from the US Food and Drug Administration Authority. It also plans to build a pharma village and attract investors, boosting manufacturing and exports.

Chart 1: Pharma Trade (USD Mn, 2020)



Key Players

Select MNCs



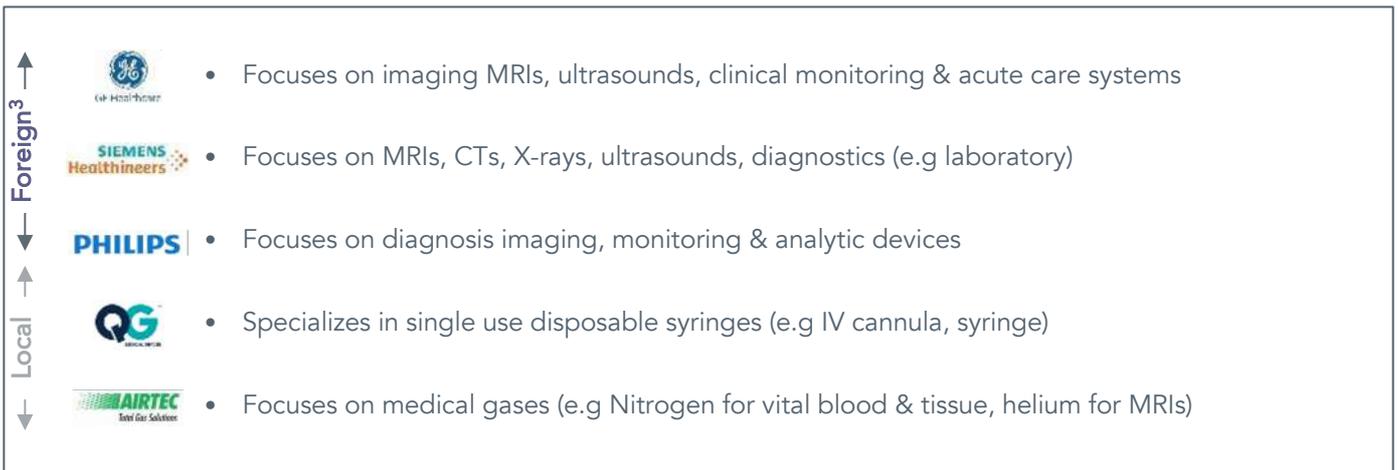
Regional Generic Players



Similarly, the manufacture of medical devices is limited to few local players like **QG Medical Devices** and **Airtec Total Gas Solutions**, while foreign firms like General Electric, Siemens and Philips dominate the market.



Figure 2: Medical Device Manufacturing Overview



However, the pandemic has incentivised local manufacturing. Notably, **Barzan Holding Company**, together with the American company Wilcox, initiated the manufacture of artificial ventilators in Qatar, to address the oxygen supply crisis seen during COVID-19. The strategic alliance produced an estimated ~2,000 units every week for domestic use as well as exports.

Distributors

The **Aamal Group** is the top player in pharma and medical device distribution in Qatar. The Group’s subsidiary, **Ebn Sina Medical** contributed 55% to total pharma sales in 2020. Qatar Pharmacy Establishment and other firms accounted for the remaining.

Figure 3: Distributor’s Market Share (% of Total Pharma Sales, 2020)





There are several elements that differentiate Ebn Sina Medical. It represents global pharma players like GSK and Sanofi, and supplies to both public and private sector entities. It boasts a diversified pharma portfolio and implemented the first robotic pharmacy in Qatar. To its credit, Qatar Pharmacy Establishment represents Middle Eastern pharma companies, such as the Saudi Pharmaceutical Industries & Medical Appliances Corporation and owns its own pharmacy network in Qatar.

The Aamal Group's strengths with regard to medical device distribution are also significant. It sells medical equipment, hospital furniture, IT solutions and consumables to 50+ companies. The Group focuses on emergency medical devices and endoscopy instruments and is a leader in healthcare technology solutions.

Other top distributors in the medical device segment include: the Ali Bin Ali Group, Barzan Medical Supplies and Mannai Medical.

The **Ali Bin Ali Group** mainly distributes medical and surgical, physiotherapeutic, dental and laboratory medical equipment, consumables and furniture. **Barzan Medical Supplies** focuses on medical imaging, flexible endoscopy, respiratory and consumable devices, and represents leading companies like Hitachi. **Mannai Medical** specialises in biomedical engineering, healthcare technology and hospital engineering solutions. Its top clients include the International Medical Company, the Ministry of Health, the Al-Ahli Hospital and the Al Wakra Hospital.

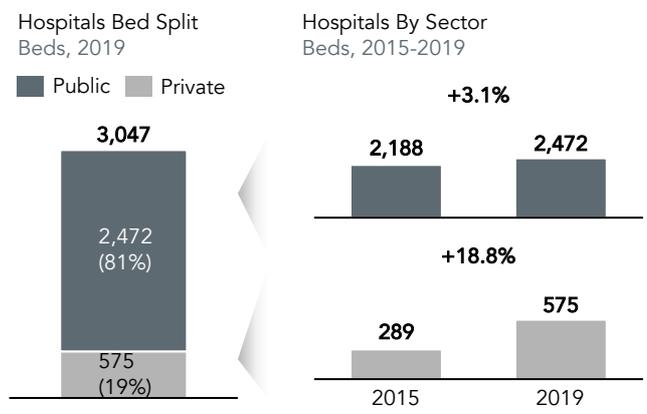
Providers

While bed supply is currently dominated by the public sector, the private sector is witnessing accelerated growth. The private healthcare provision market is fragmented across few players, while Hamad General Hospital controls ~26% of the public supply.

Furthermore, the Government is encouraging greater participation of the private sector and promoting the expansion of many private healthcare facilities.

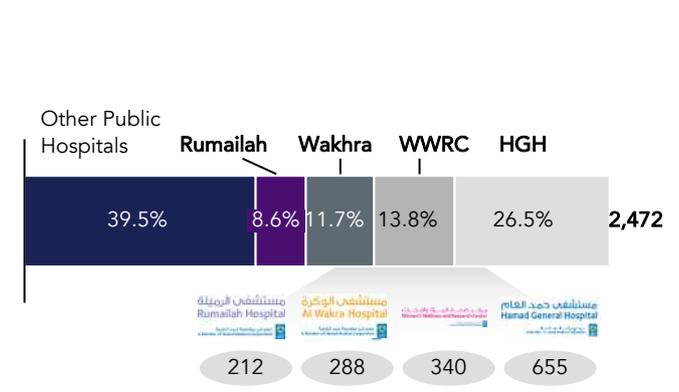
There are ~70 new private facilities in the pipeline, including a specialised diabetes hospital by 2023 and a general hospital by 2021. Existing facilities are also expected to be expanded; for example, the bed capacity at the Al-Ahli Hospital will be increased to ~500 by 2022.

Chart 2: Overall Bed Supply Distribution



PSP & Private Facilities Expansion Investment Plans

Chart 3: Public Sector Beds Distribution (2019)



Select Private Sector Players



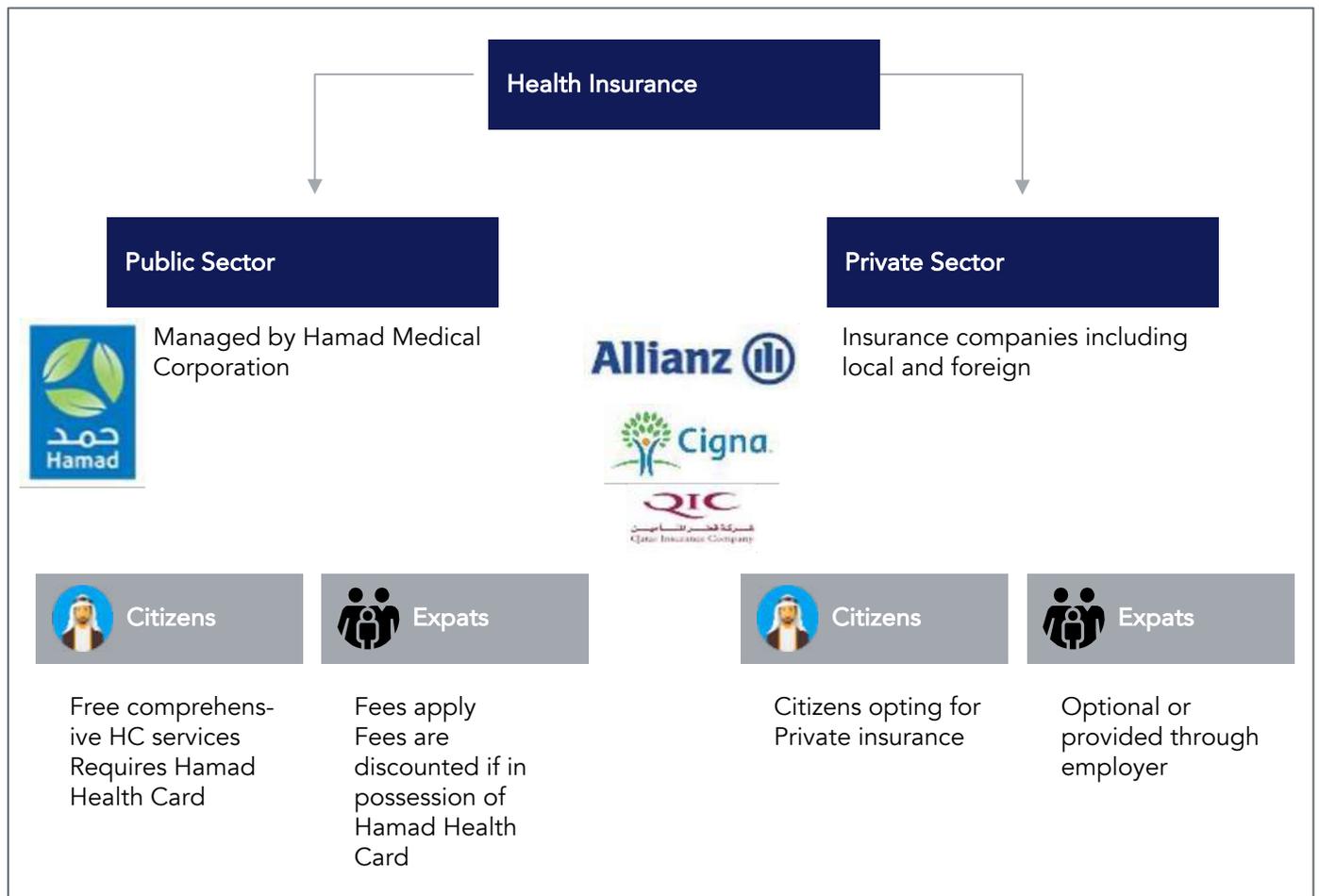
Legend # of Beds



Payers

Health insurance in Qatar has two parts to it: public and private. The public health insurance, managed by the Hamad Medical Corporation, is free for all citizens and subsidised for expatriates. The coverage is comprehensive and can be availed with a Hamad Health Card. The private health insurance segment comprises local and foreign insurers; and is available to both citizens and expats.

Figure 4: Current HC Coverage Overview



A mandatory health insurance law is expected to be launched, which will reduce the cost pressure on health services and introduce medical insurance for visitors. This will help attract foreign insurance firms to establish their operations in Qatar, thus boosting demand for private facilities. The law will also provide more affordable healthcare for all, limiting co-payments.



VALUE CHAIN

Table 2: Value Chain

Qatar's healthcare value chain is made up of prevention, consultation, diagnosis, intervention and monitoring. Many services cut across the value chain as they can be provided at different steps of a patient's journey. While the local players operate in the traditional delivery of medicine, there is a clear gap when it comes to digital services.

Segment	Description	Activities/Services involved	Global players*	Local players*	Digital services
Prevention and early detection	Lifestyle behaviours and health assessments to minimise disease burden and associated risk factors	<ul style="list-style-type: none"> Activity of nurses Home laboratory services Lifestyle connected wearable devices and application** Disease monitoring solutions** E-prescription and online medicine delivery** 			
Out-patient consultation	Initial encounters of patients with a practitioner	<ul style="list-style-type: none"> Treatment activities Pharmacy services Dentistry Activity of nurses Physician directories and appointment scheduling platforms** Virtual consultations** Patient electronic records** E-prescription and online medicine delivery** Medical waste** 			
Diagnosis	Set of services performed to determine underlying cause of signs and symptoms	<ul style="list-style-type: none"> Diagnostic activities Services of lab and technical facilities Radiologic and anaesthesiology services Activity of nurses At-home laboratory services X-ray laboratories Diagnostic imaging centres Blood analysis laboratories Blood banks Disease monitoring solutions** Patient electronic records** 			

**Non-exhaustive

**Non-ISIC suggested additional service

Segment	Description	Activities/Services involved	Global players*	Local players*	
					Digital services
Patient referral and intervention	Set of services required by patients in need of surgical interventions at the hospital level	<ul style="list-style-type: none"> • Treatment activities • Radiologic and anaesthesiology services • Pharmacy services • Food and other hospital services • Activity of nurses • Activity of midwives • Physician directories and appointment scheduling platforms** • Virtual consultations** • Patient electronic records** • E-prescription and online medicine delivery** • Medical waste** • Equipment maintenance** 	   	   	
Monitoring and management	Set of services provided to patients following diagnosis, intervention and hospital discharge	<ul style="list-style-type: none"> • Pharmacy services • Activity of nurses • Activity of physiotherapists • Nursing homes • Facilities for treatment of alcoholism and drug addiction • Assisted living facilities • Medication management and adherence applications** • Disease monitoring solutions** • Patient electronic records** • E-prescription and online medicine delivery** 	  		

**Non-exhaustive

**Non-ISIC suggested additional service

GLOBAL TRENDS WITH REGIONAL ADOPTION



There are multiple trends emerging across the healthcare services value chain.

1. Surge in Digitalization

The pandemic has expedited digitisation of healthcare services globally, which, in turn, is helping optimise access, quality and patient experience.

Global Adoption

- **Tele-healthcare**

Tele-healthcare has made way for the provision of remote clinical services like video consultations, enhanced patient access and convenience, and improved disease management engagement.

- **Data Analytics**

Patient data analysis is playing a key role in early detection and care management. M-health apps, such as wellness and fitness apps, track vital information for disease management via behavioural change. Electronic Medical Record (EMR) and Electronic Health Record (EHR) are digitised healthcare systems that store and exchange data for integrated care models.

- **Robotics**

Robotics helps perform a diverse array of functions, such as assisted surgeries and patient support. In surgeries, robotics allows for greater precision, leading to swift recovery and shorter hospital stay.

Providers around the world are integrating diversified digital services and offering patients an improved healthcare experience.

In the **UK**, the Royal Wolverhampton NHS Trust signed a 10-year partnership with a digital third-party provider, Babylon Health, to create an integrated health system for patients. Using an app, patients will be able to access primary and secondary care services, such as clinical consultations and appointment booking, personal clinical records and health assessment. An AI-powered health assistant will offer triage advice.

The Nuffield Health Bristol Hospital in the UK launched the use of a robotic arm for assistance in knee replacement surgeries. It allows greater surgical precision and joint alignment.



Regional Adoption

- The Mediclinic Middle East Hospitals in the UAE launched their tele-medicine services using a third-party provider, Health at Hand. These services allow remote video-consultations with a family medicine specialist as well as enable appointment bookings.
- The HealthPoint Hospital in Abu Dhabi implemented the Cerner EHR platform, with the aim of providing patients a seamless experience. The EHR will allow access to patient information and support decision-making while providing integrated care across hospital, laboratory and health centres.
- In **Qatar**, the Primary Health Care Corporation and the Hamad Medical Corporation partnered with Cerner to provide remote/virtual consultations to patients. The Hamad Medical Corporation's Child Development Centre also launched virtual consultations.
- Qatar Biobank collects and analyses biological samples, supporting disease prevention and medical treatment. Both the Heart National Hospital (part of the Hamad Medical Corporation) and the National Centre for Cancer Care and Research adopted Cerner's EHR platform.
- The Hazm Mebaireek General Hospital performed a robotic-assisted surgery on a COVID-19 positive patient. Robotics helped physicians to operate safely and, in turn, ensured that social distance measures were maintained at all times.

2. Preventive Care

Lifestyle-related diseases pose a burden on global healthcare facilities and resources, with governments implementing preventive care initiatives like awareness programmes, national strategy targets and smart technology adoption.

Global Adoption

The **UK** has in place several plans and programmes to prevent diabetes and obesity as well as tobacco and alcohol dependence.

- **Smoking cessation:** Offer National Health Service-funded tobacco dependence treatment to admitted patients who are smokers, irrespective of their gender
- **Alcoholism prevention :** Establish specialist Alcohol Care Teams in hospitals with high rates of alcohol-related admissions; these specialists will provide practical advice on harmful drinking, supported by a range of alternatives to facilitate change
- **Diabetes and obesity prevention:**
 - Provide support and access to weight management services in primary care for Type 2 diabetes and hypertension with BMI 30 or higher
 - Introduce a Diabetes Prevention Programme, supported by digital options for greater patient access



Regional Adoption

- The UAE Government – working in partnership with private facilities – is offering free screening for early detection of breast cancer and diabetes. The Government also launched the Health Heroes app to raise awareness on the benefits of a healthy lifestyle among children, thus supporting the national efforts to reduce child obesity.
- The Government of **Saudi Arabia** launched the 'Quality of Life Program 2020' – focused on preventive care and fitness, in line with national targets of reducing obesity by 3% and diabetes by 10% by 2030. The Government organised anti-diabetes national education plans and created a specialised centre to bring down disease prevalence.
- **Qatar's** National Health Strategy concentrates on prevention targeting; for example, a 5% reduction in obesity by 2022. The Al-Ahli Hospital launched a campaign in 2020, to raise awareness on the importance of the early detection of breast cancer.

3. Specialised Centres of Excellence (COEs)

Specialised COEs are coming up; these provide expertise via multidisciplinary teams. Moreover, there is a rising need for complex services, encouraging investments in specialised treatment as supply gaps across the Gulf Cooperation Council (GCC) remain. A key consideration for the region is also to attract inbound and reduce outbound medical tourism.

Global Adoption

- In **Singapore**, the Mount Elizabeth Hospitals offer general gastro, gastrointestinal oncology, bariatric surgery and organ transplant, supported with nutrition, within one fully integrated model of care. The Hospitals also provide complex care using the latest technologies, such as robotics, and follow a multidisciplinary approach to all treatments.
- In **India**, the Apollo Hospitals have a comprehensive cancer care centre with a large team of specialised surgical and radiation physicians, who are supported by a multidisciplinary team. Treatments are performed using the latest technologies, including robotics, and the Hospitals are expected to launch proton therapy – the first of its kind in South Asia and the Middle East.

Regional Adoption

- The **Dubai** branch of the King's College Hospital London provides specialised liver care programmes, with services like counselling and assessment for liver transplant, post-transplant medical care and management of adults and children with liver diseases. Additional services include liver imaging, pathology and metabolic and genetic testing.
- The Al Qassimi Hospital in the UAE has gained a reputation in the Middle East for its cardiac care, specifically atrio-ventricular diseases; accredited in 2021 from the Joint Commission International (JCI). It also performs complex medical surgeries, including robotic cardiac ones, supported by qualified medical personnel, state-of-the-art infrastructure and advanced medical equipment. The Hospital uses advanced techniques, such as the Rotate-on-Retract tool that applies artificial intelligence to treat coronary arteries.
- In **Qatar**, the Hamad Medical Corporation's Adult Allergy and Immunology Division was recognised as a COE in 2020 – the first in the GCC region. Also, the Sidra Medical Hospital expansion plans are expected to include COE strategies in cardiovascular diseases and neonatology.



4. Home care/Long-Term and Post-Acute Care (LTPAC) services

Home care and LTPAC services are provided at one's home or in a specialised facility (like rehabilitation). Adoption of such services has increased due to COVID-19, with providers using tech-enabled solutions for accessibility and convenience, continuous quality care and integrated services.

Global Adoption

- The Shirley Ryan Ability Lab in the **US** is a physical medicine and rehab research hospital, specialising in rehab for the most complex adult and paediatric conditions. It has been ranked as the best rehab hospital in the country for 25 years. The hospital provides in-patient services like long-term care and ventilated long-term care, as well as supports out-patient services like physical, speech and occupational therapies and prosthetic management.
- The Rehabilitation Hospital-Passauer Wolf in **Germany** is the country's leading rehab hospital that treats neurological, cardiovascular and orthopaedic conditions and chronic musculoskeletal disorders; and provides post-trauma care. It supports out-patient services and offers a multidisciplinary approach.

Regional Adoption

- The Specialised Rehabilitation Hospital in the **UAE** is a standalone facility with seven core offerings. This includes brain and spinal cord, orthopaedic/musculoskeletal, paediatric long-term care and rehabilitation services. The hospital is equipped with state-of-the-art equipment and facilities, implementing the latest bionics and robotics. It also offers home care services.
- The NMC ProVita International Medical Centre in the UAE provides a full range of rehab, home care and home dialysis services with a specialisation in ventilated long-term care. The Centre has an international partnership with the Spaulding Rehabilitation Network, a Harvard Medical school affiliate.
- Home care in **Qatar** is offered primarily to the elderly via the Primary Health Care Corporation and the Hamad Medical Corporation. Since COVID-19 limited unnecessary interactions at healthcare centres, remote care through tele-care technology acts as a substitute for in-person visits when possible.



COVID-19 IMPACT

The pandemic exacted a heavy toll on healthcare systems across the globe. Demand and supply pressures on healthcare services soared, with traditional supply chains being thrown out of gear.

Drastic Decline in Healthcare Services Volumes

Elective surgeries and outpatient consultations were either cancelled or rescheduled. This impacted providers' revenue streams.

Qatar's Response

Primary Health Care Corporation cancelled all scheduled outpatient visits and Hamad Medical Corporation hospitals rescheduled all elective surgeries during March 2020 in an attempt to contain the virus spread.

Disruptions Along the Healthcare Supply Chain

Travel bans and lockdowns created shortages. Supply delays were particularly pronounced in countries with high reliance on imported goods like medical consumables and pharmaceutical drugs. COVID-19 induced economies to initiate local manufacturing.

Qatar's Response

Barzan Holding tied up with the US company, Wilcox to start the local manufacture of artificial ventilators and mitigate the oxygen supply crisis.

Capacity Adaptation to Meet Demand

Temporary facilities were required to accommodate COVID-19 patients to meet the surge in demand. Facility re-configuration was also essential to ensure additional examination space while upholding sanitation standards.

Qatar's Response

The Ministry of Public Health built a quarantine complex with 18,000 beds and the required treatment equipment to treat the rising number of COVID-19 patients.

SWOT ANALYSIS

Figure 5: SWOT Analysis



STRENGTHS

- National healthcare strategies goals support population health & preventive care, and sector enhancements (E-Health strategy & investments/expansions, etc.)
- Strong public health sector dominated by Hamad Medical Corporation, contributing to around 81% of total beds
- Availability of specialized services e.g., sports medicine, women & child & home healthcare



WEAKNESS

- Sector highly reliant on goods/ services imports. e.g., pharmaceuticals/ medical equipment and healthcare Tech solutions (e.g., EMRs licenses)
- Regulatory barriers impacting deployment/ implementation of tech solutions (e.g., e-prescription/ telemedicine)
- Limited/ delayed activation of healthcare initiatives expected to drive the sector and adoption of tech services
- Delayed launch of revised national health insurance which was expected to boost demand for healthcare services



OPPORTUNITIES

- Recent lift of blockade allows Qatar to benefit from regional expertise & collaborations to improve sector and boost small businesses (e.g., regional funding/access to industry experts, etc.)
- Room to adopt new/innovative global technologies locally such as M-Health, Patient Disease Monitoring Solution to improve healthcare outcomes



THREATS

- Prevalence and preference for international brands & re-known players representing MNCs (e.g., Ali bin Ali and Aamal Medical) challenging adoption of services from small businesses
- High reliance on international company expertise to activate healthcare strategies/ roadmaps (e.g. TASMU) and Tech solutions increasing competition & limiting development/ retention of local solutions & improvement of national capabilities
- Recent lift of blockade will introduce new competitors in healthcare services



CONCLUSION

Qatar's healthcare provision market crossed US\$5 billion in 2020 and is expected to add another US\$2 billion in value by 2025, supported by private spending and infrastructure investments as well as innovative solutions in the wake of COVID-19. In fact, technology has disrupted each element of the healthcare ecosystem and patient journey, bringing digitalisation of services into focus.

Remote consultations are being adopted across public sector providers (Hamad Medical Corporation and Primary Health Care Corporation) and key private providers (like the Sidra Medical Hospital). Telemedicine is playing an important role in home care and LTAC services as well.

Preventive and specialised care services are also gaining prominence globally and across the Middle East. Initiatives like the Qatar Biobank are utilising data analytics to improve prevention and treatments. Gradual steps are being taken to develop Qatar into a medical tourism hub with expertise in complex and specialised services. Hospitals implementing EHR/EMR are taking the country closer to an all-in-one system of care.

On the whole, the Government is relentlessly endeavouring to ensure Qatar houses a top-tier healthcare system by 2030, focused on integration, quality care and service delivery, enhanced protection and prevention, health-for-all policies and effective governance.

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About Qatar Development Bank

Qatar Development Bank (QDB) was founded by Emiri Decree to grow Qatar's private sector and diversify its economy. His Highness Sheikh Hamad Bin Khalifa Al Thani, the Father Amir, identified these as vital tasks in developing Qatar into a modern state. Since its establishment in 1997, QDB has been at the forefront of these efforts. It has worked with thousands of Qatari entrepreneurs and enterprises and has provided investment and guidance to brand-new start-ups and well-established corporations. QDB has built a reputation for identifying promising investment opportunities. Its focus is on growing SMEs in key sectors by offering several services via a single window to support expected growth. Through smart, targeted financing products and advisory support services, QDB is nurturing a sound and sustainable knowledge-based economy for Qatar.

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