

HEALTHCARE & LIFE SCIENCES



CANADA SECTOR STATS

- Canada is ranked 14th in the world in terms of healthcare access and quality.
- The GDP of Canada's health industry was C\$135.9 billion in 2018, representing 7.0% of Canada's total GDP.
- Over 1,740,000 workers are part of Canada's health industry labour force, making up 9.4% of Canada's total labour force.
- In 2017, Canadian life sciences companies received C\$696 million in venture capital investment and C\$388 million in private equity investment.

UAE SECTOR STATS

- The UAE is ranked 73rd in the world in terms of healthcare access and quality.
- The GDP of the UAE's health and social services industry was US\$4.8 billion in 2016, representing 1.4% of the UAE's total GDP.
- Over 126,000 workers are part of the UAE's health and social services labour force, making up 2.0% of the UAE's total labour force.
- In 2016, foreign entities invested US\$293.1 billion into the UAE's health and social services industry.

The healthcare sector is playing an increasingly important role in our world due to global trends such as aging and growing populations; the increasing prevalence of chronic illness; and the development of new technologies that can be applied to medicine — to name a few. With record-level investments in healthcare over the last few years, both Canada and the UAE have recognized the importance of improving capacity and modernizing their healthcare systems to meet the growing demands caused by these trends.

Additionally, Canada and the UAE have vision to be at the forefront of life sciences innovation. The life sciences sector — which includes biotechnology, pharmacology, and health sciences — is the key to creating new health solutions and contributes to the improvement of existing ones. The two countries have created programs, provided funding, and worked to remove regulatory barriers to incentivize the growth of life sciences research and development.

Between healthcare and life science, both Canada and the UAE provide ample opportunities to businesses, academics, and medical professionals who wish to work or collaborate within these sectors.

THE CANADA-UAE SECTOR RELATIONSHIP

Although both Canada and the UAE have placed much of their focus on growing healthcare and life sciences internally, there have been successful collaborations between the two countries in these sectors.

In January 2018, The Hospital for Sick Children (SickKids) in Toronto and Danat Al Emarat Hospital for Women and Children in Abu Dhabi began a clinical partnership to bring advanced pediatric care to the UAE. The partnership covers the exchange of experience and knowledge; the training of physicians and nurses; and placing SickKids-trained physicians at Danat Al Emarat Hospital to care for complicated cases utilizing SickKids clinical protocols and standards.

Canadian health start-ups have also been involved in advancing UAE healthcare solutions through the Dubai Futures Accelerator Programme. Dubai Futures facilitates partnerships between entrepreneurs and UAE government entities to address challenges across various sectors through innovative solutions. The revolving nine-week programme provides a platform for entrepreneurs to use Dubai as a test bed to further develop their products and services and get them to that next level of solving global problems. If successful, they may also have the opportunity to sign MOUs with the Dubai government. The Dubai Health Authority is a participating government entity and has worked with Canadian health start-ups Hexoskin and HiNT through the programme.

HEALTHCARE & LIFE SCIENCES IN CANADA

Canada has a highly advanced and robust healthcare sector, one that is considered among the best in the world in terms of access and quality. The sector is highly valued by government and citizens alike, making its continued success and development a priority for the country and an opportunity for health-related businesses, professionals, and investors.

The healthcare system in Canada is publicly-funded. As a priority sector, healthcare continues to see heightened levels of public spending and investment year over year. In 2018, the Government of Canada announced it would provide C\$38.6 billion in health transfers to the provinces/territories, an increase of C\$1.4 billion over the previous year. In addition, it made a 10-year commitment in 2017 to provide C\$11.0 billion in additional funding to the provinces/territories to support home care and mental health services. The federal government has also allocated funding in its 2017 and 2018 budgets to other specific health priorities, namely improving access and lowering prices to prescription medications, supporting healthcare system innovation, improving health systems among Indigenous communities, and responding to the ongoing opioid crisis. Canada's heavy investment into its healthcare system makes it one of the highest spenders on health among all 36 OECD countries.

From the discovery of insulin to the invention of the pacemaker, Canada has had a strong record of health innovation. The country has a health innovation ecosystem consisting of some 900 firms that encompass pharmaceuticals manufacturers, medical technology and equipment manufacturers, and life sciences researchers.

As a place to locate, Canada ranks first in the G7 in terms of cost-effectiveness for the establishment and operation of manufacturing facilities for both medical devices and pharmaceuticals. The country also offers the least expensive research and development services for clinical trial administration and biomedical research amongst the G7.

OPPORTUNITIES FOR UAE COMPANIES IN CANADA:

- Investing in Health Tech Start-Up

Currently, the Government of Canada's commitment to growing the life sciences sector falls under the *Innovation and Skills Plan*. Through the Plan, the government aims to double the number of high-growth companies in Canada, particularly in the digital, clean technology, and health technology sectors, from 14,000 to 28,000 by 2025. They aim to meet this target by: (1) accelerating a small number of business-led innovation "superclusters" that focus on innovative industries; (2) increasing the number of collaborations between industry, post-secondary institutions and research institutions; and (3) assisting Canadian innovators in finding a first customer to test and validate their technologies through the federal government. In addition, the Health and BioScience Strategy Table — an industry-government collaboration group chaired by industry leaders — proposed additional actions to the Government of Canada to grow health innovation in the country. These actions included reforming the regulatory system to make it more agile, transparent, and responsive so that businesses can explore and act on new opportunities

and the establishment of a procurement innovation agency that focuses on value over price.



Actions Proposed by the Health and Biosciences Economic Strategy Table

Feature Project: Calgary Cancer Centre

Once complete in 2023, the Calgary Cancer Centre will become the largest free-standing cancer facility in Canada and will consist of two curved buildings across 127,000 square metres. It is located in Calgary, Alberta.

The Calgary Cancer Centre aims to be a world-class facility and academic centre for the provision of cancer services. The facility will increase cancer care capacity in Southern Alberta and support integrated and comprehensive cancer care, as well as clinical and academic research needs. The building will house 100 patient exam rooms, more than 100 chemotherapy beds, 160 in-patient beds, 12 radiation vaults, and much needed space for clinical trials and patient treatment.



Rendering of Calgary Cancer Centre

The C\$1.4-billion project is being built by PCL Construction for the Government of Alberta and the Alberta Cancer Association. It is currently one of the largest construction projects underway in Alberta.

HEALTHCARE & LIFE SCIENCES IN UAE

Cognizant of the importance health plays in the success of its people and its economy, the UAE has moved to develop a high-quality and comprehensive healthcare system. In fact, the UAE is one of the most organized and fastest growing healthcare markets in the Gulf Cooperation Council Countries (GCC).

The healthcare system in the UAE is mixed public-private.

A large part of the sector's rapid growth and heightened levels of investment in the last decade can be attributed to the UAE's ambitious goals aimed at achieving a world-class healthcare system – one of the six pillars of the *National Agenda in line with Vision 2021*. In addition to health being a federal priority, both Dubai and Abu Dhabi have created their own separate health strategies (*Dubai Health Strategy 2021 and Abu Dhabi Healthcare Strategic Plan*), which aim to boost the quality of health services and promote health as an industry in their respective regions. These goals and strategies have led to the development of state-of-the-art healthcare infrastructure across the country as well as the development of health-focused freezones (such as Dubai Healthcare City and Sharjah Healthcare City), which provide opportunities to private international health companies interested in the UAE and GCC markets.

OPPORTUNITIES FOR CANADIAN COMPANIES IN UAE:

- Building Healthcare Infrastructure
- Capacity Building and Training for Physicians and Allied Staff
- Medical Technologies & Devices Exports
- Digital Health/ Health IT & Telemedicine

In addition to improving its general healthcare system, the UAE has emphasized its desire to grow as a hub for medical tourism. The Dubai Health Experience website, by the Dubai Health Authority, is the world's first comprehensive medical tourism portal that provides all health, travel, hospitality and visa services. It enables international medical tourists to book medical procedure packages at any of the 26 private and public hospitals in Dubai along with special discounted airfares, visa, hotel stay, leisure activities, and medical insurance. By 2020, Dubai is expecting to cater to 500,000 patients from outside the country and the country's medical tourism revenues are expected to cross US\$700.0 million by 2020. Top procedures for medical tourism in the UAE include orthopedic surgery, cosmetic surgery, and infertility treatment.



Innovative health solutions are also considered a growth priority for the UAE as health is one of the seven sectors listed under their *National Innovation Strategy*. Focus areas for research and development include biotechnology, pharmaceutical technology, and medical research on the treatment of prevalent chronic illness such as diabetes and obesity. The development of health innovation is conducted through public institutions (such as the Abu Dhabi Department of Health and the Al Jalila Foundation); educational institutions (such as New York University Abu Dhabi); and private companies working within the UAE and its many freezones. The Dubai Science Park freezone is particularly important in this field as it is dedicated to the growth of life sciences, with a specific focus on biotechnology and pharmaceutical innovation.

Feature Project: Sheikh Shakbout Medical City

Completed in 2018, the Sheikh Shakbout Medical City is one of the largest hospitals in the UAE, with four towers and an array of buildings stretching across 300,000 square metres. It is located in the Al Mafraq area in Abu Dhabi.

Billed as one of the most important healthcare developments in the region, Sheikh Shakbout Medical City aims to distinguish itself as an advanced medical facility for trauma and intensive care. It will also be the first centre in the UAE to provide advanced burn treatment and will offer specialized and reconstructive surgeries utilizing state-of-the-art technology. It houses 732-beds and will employ up to 440 medical staff and 1,800 nursing staff.



Rendering of Sheikh Shakbout Medical City

The US\$1.1-billion project was built by Abu Dhabi General Services Company (Musanada) for Abu Dhabi Health Services Company. The Canadian firm Stantec had a role in its design and engineering.

GOVERNMENT RESOURCES

- **Health Canada:**
www.canada.ca/en/health-canada.html
- **UAE Ministry of Health and Prevention:**
www.mohap.gov.ae
- **Health Authority Abu Dhabi:**
www.haad.ae
- **Abu Dhabi Health Services Company:**
www.seha.ae
- **Dubai Health Authority:**
www.dha.gov.ae/

- **Canadian Trade Commissioner Service in the United Arab Emirates:**

The Canadian Trade Commissioner Service has been helping Canadian companies navigate international markets for more than 120 years. Canadian trade commissioners are located in more than 160 cities worldwide, including Abu Dhabi and Dubai. Canadian trade commissioners in the UAE are each responsible for one or more key sectors. Their offices are at the Embassy of Canada to the United Arab Emirates (located in Abu Dhabi) and the Consulate General of Canada in Dubai.

www.tradecommissioner.gc.ca/united-arab-emirates-emirats-arabes-unis

E-mail: uae-eau.infocentre@international.gc.ca

- **Consulate General of the United Arab Emirates in Toronto:**

The Consulate General of the UAE in Toronto has a business development team that can point you in the right direction in Canada. The Consulate General of the UAE and the Embassy of the United Arab Emirates in Ottawa work together with key partners to support UAE companies interested in the Canadian market.

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