Pricing and Reimbursement in the United Arab Emirates

Description: The healthcare sector in the emirates of Abu Dhabi and Dubai is undergoing drastic changes as a result of the structural and financing reforms that will impact all major actors in the healthcare sector.

Scope

- Overview of the healthcare reforms undertaken in Abu Dhabi and Dubai in order to contain costs
- Strategic analysis of the changes in interaction between payers, providers of healthcare and pharmaceutical firms
- Review of potential pricing and reimbursement strategies to be adopted by insurers
- Commercial implications of the reforms on all businesses in the UAE

Highlights of this title

Reforms undertaken in the UAE will increase healthcare access to all expatriates, and improve the quality of care provided in both the public and private sector. With patients placed at the centre of the reforms, the focus will be on preventive care rather than curative treatment since the UAE is burdened by chronic diseases such as diabetes.

Greater involvement of private insurers through compulsory employer financed health insurance will mature the health insurance industry. Datamonitor believes that insurers will emerge as the dominant influencer of the healthcare industry as relationships between providers, payers and Pharma change as a result of the reforms.

With the implementation of tighter pricing and reimbursement controls, the pharmaceutical market is expected to evolve, driven by initiatives to increase the use of generics and stricter prescribing practices. However, consumer attitudes towards generic drugs will need to be changed for such cost-containment measures to be fully realized.

Key reasons to purchase this title

- Understand how the development of the UAE insurance industry will impact your business
- Anticipate stakeholder interactions that will change as a result of the healthcare reforms
- Identify opportunities to increase revenue streams by developing corporate strategies that are in line with The recommendations

Contents:

CHAPTER 1 EXECUTIVE SUMMARY
Scope of the analysis
Datamonitor insight into P&R in the UAE
Key opinion leaders interviewed
Related reports

CHAPTER 2 OVERVIEW OF THE HEALTHCARE SYSTEM IN THE UAE
UAE healthcare reforms designed to support countrys future needs
Access to healthcare is universal for nationals but varies for expatriates in the UAE
The Ministry of Health is becoming increasingly concerned about the UAEs ability to support its future healthcare needs
The Registration and Drug Control Department - responsible for approval and pricing of drugs
CHAPTER 3 HEALTHCARE REFORMS IN THE UAE
The need for international-standard healthcare in the UAE
Abu Dhabi and Dubai have adopted similar health reforms with subtle differences
Healthcare reforms in Abu Dhabi
The Abu Dhabi Health Insurance Bill
Insurance in Abu Dhabi
Basic health insurance policy (Abu Dhabi Plan)
Enhanced health insurance policy
Health insurance for nationals
The role of DAMAN in Abu Dhabi
The 2005 health insurance law requires private medical coverage for all expatriates working and residing in Abu Dhabi
Healthcare reforms in Dubai
Reforms undertaken by the Dubai Health Authority
Universal healthcare for nationals
Healthcare reforms for expatriates
Structural reforms - focus on primary healthcare
Financing healthcare reforms
Mechanism of the new system
Insurance in Dubai
Insurance coverage - greater cost for certain employers
The role of third party administrators
CHAPTER 4 PRICING AND REIMBURSEMENT IN THE UAE
Overview of P&R and cost-containment in the UAE
Controlling the cost of high priced drugs in the UAE
Price controls implemented in the UAE
Price cuts and profit controls in the UAE
Reference pricing in the UAE
Future strategies to control drug prices and healthcare costs
Reimbursement controls in the UAE
Insurers will introduce more patient co-payments for prescription drugs
Rx-to-OTC switching provides little benefit to payers in the UAE at present
Formulary lists are effective cost-containment tools that will be used widely in the UAE
A change of attitude and incentivization will be necessary to increase use of generics
Patient generic education is key
Managing expatriate healthcare expectations
Pharmacists in the UAE need to be empowered to substitute brands for generics
The need for fixed national treatment guidelines
The UAE should look to Japan for generic reform inspiration
CHAPTER 5 IMPACT OF HEALTHCARE REFORMS ON BUSINESSES
Health reforms will impact all companies operating in the UAE
Employers in the UAE are feeling the pressure of providing healthcare coverage for their employees
Reforms will promote the development of the health insurance industry
The governments role will be to ensure that the new health systems are sustainable
The UAE pharmaceutical market will open up to generics as the health insurance industry develops
Pharmaceutical importation for personal use is widespread due to the UAEs high drug prices
Product positioning will be critical for Big Pharma
Healthcare reforms will increase competition between both public and private providers, improving service quality
CHAPTER 6 BIBLIOGRAPHY
Datamonitor reports
Exchange rates
List of Tables
Table 1: Health economics indicators in the UAE ($)
Table 2: Comparison of insurance reforms in Abu Dhabi and Dubai for nationals and expatriate residents, 2009
Table 3: Comparison of basic health insurance plan in Abu Dhabi with the basic health insurance package in Dubai for 2009.
Table 4: Abu Dhabi Plan - Basic health insurance policy, 2009
Table 5: Total number of Inpatient and outpatient claims details for Basic and Enhanced health insurance policies in Abu Dhabi, 2007
Table 6: DAMAN - comparison of health insurance products, 2009
Table 7: Price comparison of branded and generic drugs used to treat three major chronic illnesses in the
UAE, 2009
Table 8: Exchange rates, 2009

List of Figures
Figure 1: Division of public and private expenditure on healthcare in the UAE, 2001-06
Figure 2: Breakdown of private healthcare expenditure in the UAE, 2006
Figure 3: Regulatory hierarchy of the principal regulators in the UAE, 2009
Figure 4: The main responsibilities of the Registration and Drug Control Department in the UAE, 2009
Figure 5: Healthcare objectives of Dubai Strategic Plan 2015
Figure 6: Relationships between payers, providers and the population, UAE, 2009
Figure 7: Health Authority of Abu Dhabis (HAAD) vision for the healthcare system in Abu Dhabi
Figure 8: Percentage of population covered by the Basic product(Abu Dhabi Plan) versus the Enhanced policy, Abu Dhabi, 2007
Figure 9: Market share of health insurance by insurer, Abu Dhabi, 2009
Figure 10: Comparison of the effect of the reforms on Dubai residents seeking treatment at public and private providers
Figure 11: Dubai Health Authoritys health model, focusing on primary care, Dubai, 2009
Figure 12: Dubai Health Authoritys new health funding system for expatriate residents, Dubai, 2009
Figure 13: Dubai Healthcare Benefits Contribution (HBC) Basic insurance and top-ups, 2009
Figure 14: Drug prices in the UAE before the price reform of 2008
Figure 15: Chronology of drug price changes in the UAE, Q1 2004, Q2 2004 and 2008
Figure 16: Ministry of Healths proposed pharmaceutical pricing in the UAE
Figure 17: Recommendations made by the General Authority of Health Services (GAHS) following the survey on the price of drugs in Abu Dhabi
Figure 18: Comparison of drug prices for selected statins in the US and Abu Dhabi, 2006
Figure 19: Shift in relationships between providers, payers, pharmaceutical companies and patients in the UAE

Ordering:
Order Online - http://www.researchandmarkets.com/reports/888998/
Order by Fax - using the form below
Order by Post - print the order form below and send to

Research and Markets,
Guinness Centre,
Taylors Lane,
Dublin 8,
Ireland.
Fax Order Form
To place an order via fax simply print this form, fill in the information below and fax the completed form to 646-607-1907 (from USA) or +353-1-481-1716 (from Rest of World). If you have any questions please visit
http://www.researchandmarkets.com/contact/

Order Information
Please verify that the product information is correct and select the format(s) you require.

Product Name: Pricing and Reimbursement in the United Arab Emirates
Web Address: http://www.researchandmarkets.com/reports/888998/
Office Code: SCD21WNX

Product Formats
Please select the product formats and quantity you require:

<table>
<thead>
<tr>
<th>Product Format</th>
<th>Quantity</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hard Copy</td>
<td></td>
<td>USD 3895 + USD 57 Shipping/Handling</td>
</tr>
<tr>
<td>Electronic (PDF) -</td>
<td></td>
<td>USD 3800</td>
</tr>
<tr>
<td>Single User:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Electronic -</td>
<td></td>
<td>USD 9500</td>
</tr>
<tr>
<td>Enterprisewide:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* Shipping/Handling is only charged once per order.

Contact Information
Please enter all the information below in BLOCK CAPITALS

Title: Mr  □ Mrs  □ Dr  □ Miss  □ Ms  □ Prof  □
First Name: ___________________________ Last Name: ___________________________
Email Address: * _______________________
Job Title: _____________________________
Organisation: _________________________
Address: _____________________________
City: ________________________________
Postal / Zip Code: _____________________
Country: _____________________________
Phone Number: _________________________
Fax Number: __________________________

* Please refrain from using free email accounts when ordering (e.g. Yahoo, Hotmail, AOL)
Payment Information

Please indicate the payment method you would like to use by selecting the appropriate box.

☐ Pay by credit card: You will receive an email with a link to a secure webpage to enter your credit card details.

☐ Pay by check: Please post the check, accompanied by this form, to:
Research and Markets,
Guinness Center,
Taylors Lane,
Dublin 8,
Ireland.

☐ Pay by wire transfer: Please transfer funds to:
Account number 833 130 83
Sort code 98-53-30
Swift code ULSBIE2D
IBAN number IE78ULSB98533083313083
Bank Address Ulster Bank,
27-35 Main Street,
Blackrock,
Co. Dublin,
Ireland.

If you have a Marketing Code please enter it below:

Marketing Code: ____________________________

Please note that by ordering from Research and Markets you are agreeing to our Terms and Conditions at http://www.researchandmarkets.com/info/terms.asp

Please fax this form to:
(646) 607-1907 or (646) 964-6609 - From USA
+353-1-481-1716 or +353-1-653-1571 - From Rest of World