

Emerging Trends Shaping the Healthcare Ecosystem in the Middle East and North Africa Region

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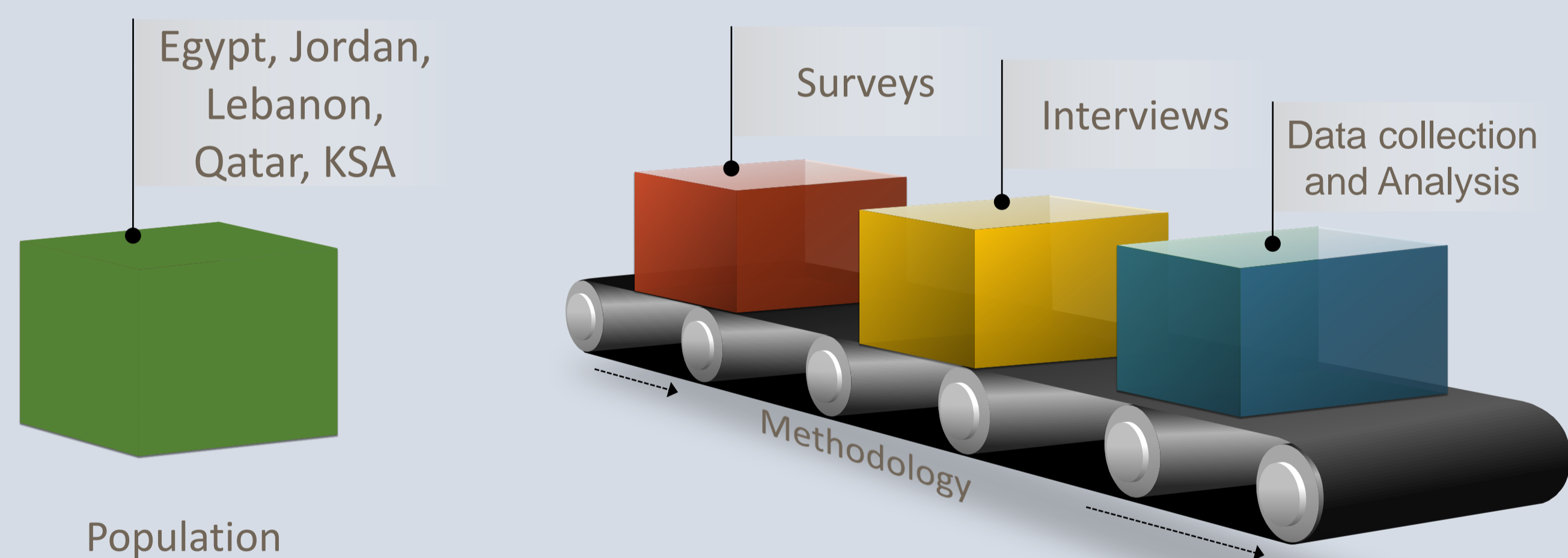
Introduction

- The Middle East and North Africa (MENA) healthcare system is very diverse with significant difference in the Gross Domestic Products (GDP) between countries.
- Differences in the GDP have direct impact on access to healthcare.
- The healthcare systems are greatly impacted by the global changes in healthcare ecosystem.
- The MENA countries are among the top countries in the world when it comes to access to internet.
- Global providers of healthcare products and services are targeting this region as a growth driver.
- Monitoring and tracking the trends that shape the MENA healthcare systems, the needs and the opportunities identified in the whole ecosystem is fundamental.

Objectives

- To understand, from a payer and policymaker perspective, emerging trends shaping the current and future healthcare system in the MENA countries as well as the unique needs in each country.
- To identify similarities and differences between neighboring countries in the region.
- To identify insights on key priorities shaping the emerging trends in the MENA countries.

Methods



- Public and private payers were identified through the ISPOR Arabic Network local chapters in five MENA countries.
- Survey was created specifically for this project (after pilot testing) listing 22 items to chose from with ability to add additional trends by respondents.
- 40 surveys were mailed to individuals responsible for making formulary and reimbursement decisions in their respective institutions.
- Reminders were sent to participants two weeks after initial mailing.
- Another reminder was sent to non-respondents with option to participate in virtual interview to complete the survey.

Conclusion

- Significant regional variations in disease priorities and main reasons were identified (Figures 2 and 3).
- Healthcare data, and Health Technology Assessment, healthcare financing were the top trends. In addition, healthcare financing, the need for new financing models with value assessment, and public health were selected as key trends and priorities in the MENA region.
- Furthermore, we hope that the results presented here will serve as an incentive to encourage greater participation in similar research studies in the future.
- This work represents an initiative toward providing a regional data source required to strengthen the healthcare ecosystem in the MENA region.
- Further assessment on a larger scale will inform potential future collaborations on Regional initiatives.

References

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Results

- Nine surveys (22.5% response rate) were completed and returned.
- The low response rate is not unusual in the MENA region since many decision makers are not used to filling out surveys. However, we believe the results are valid as they represent all participating countries.
- As shown in Figure 4, the biggest trend is greater focus on HTA followed by health data, healthcare financing, and new financing models.
- Interestingly, the need for new financing models and new business models ranked among the top trends. This is likely reflective of the difference in healthcare system setup (public, private, and out-of-pocket, and the varying GDP/capita).

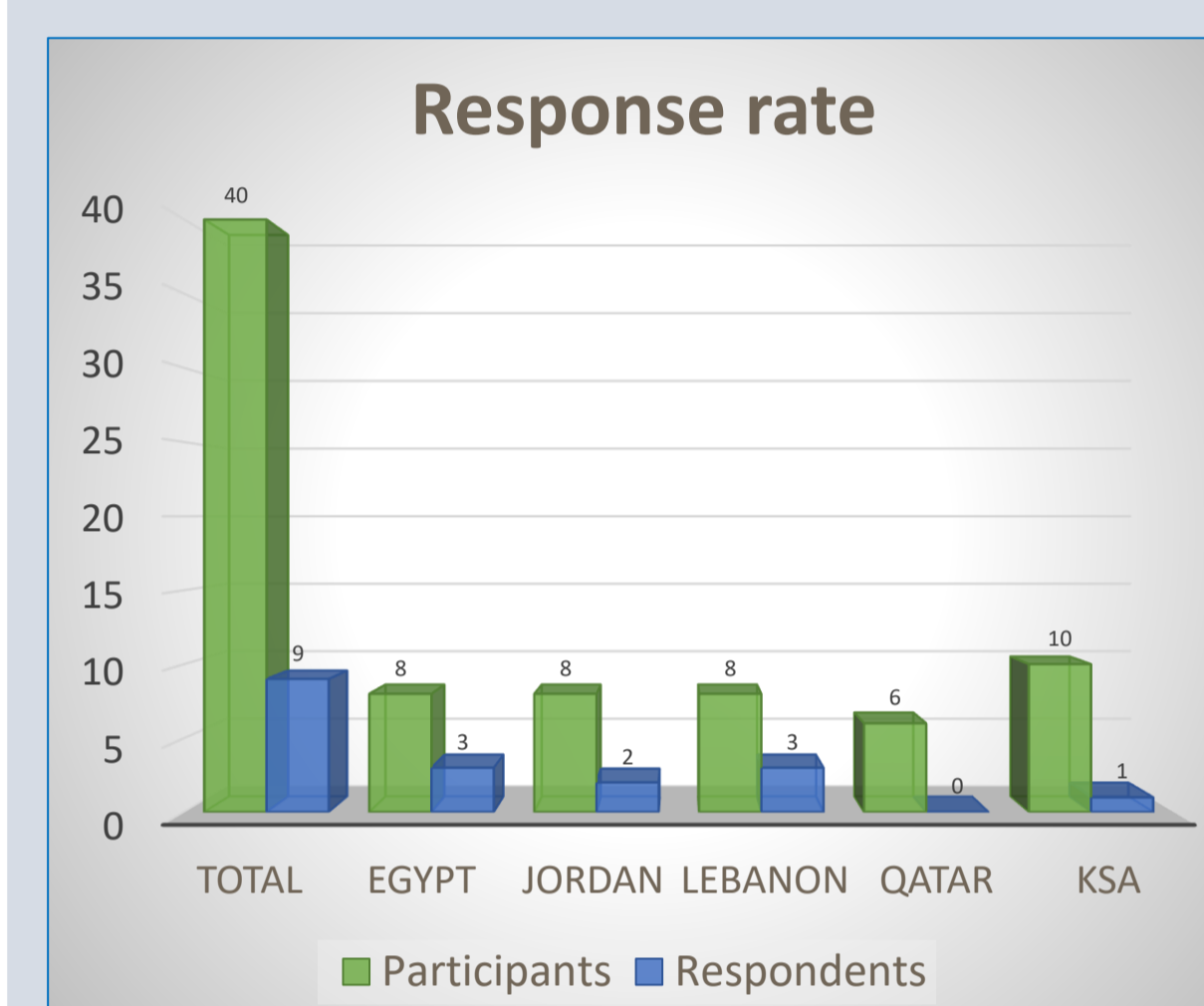


Figure 1: Summary by country for response rate

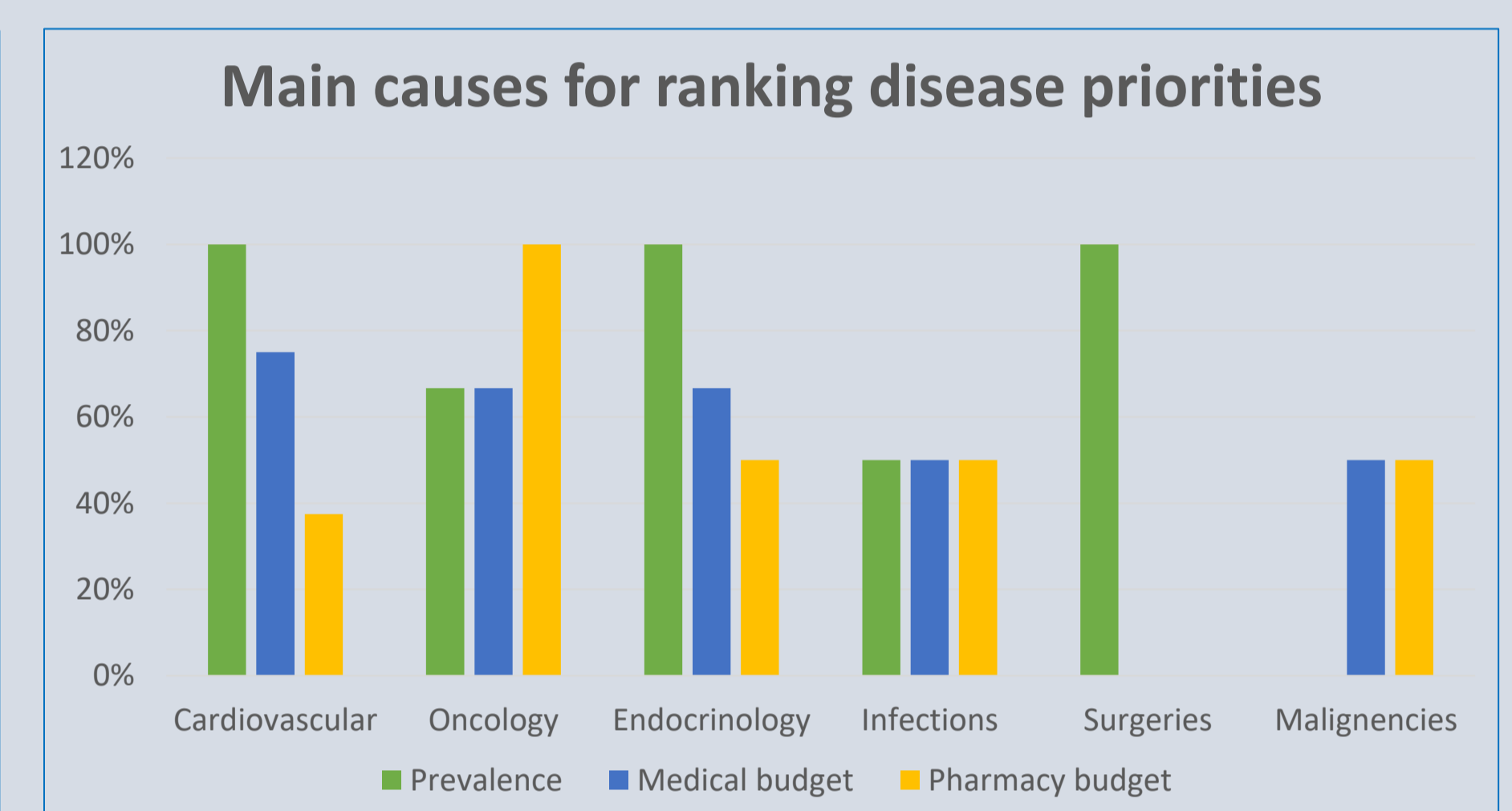


Figure 2: Disease priorities main causes

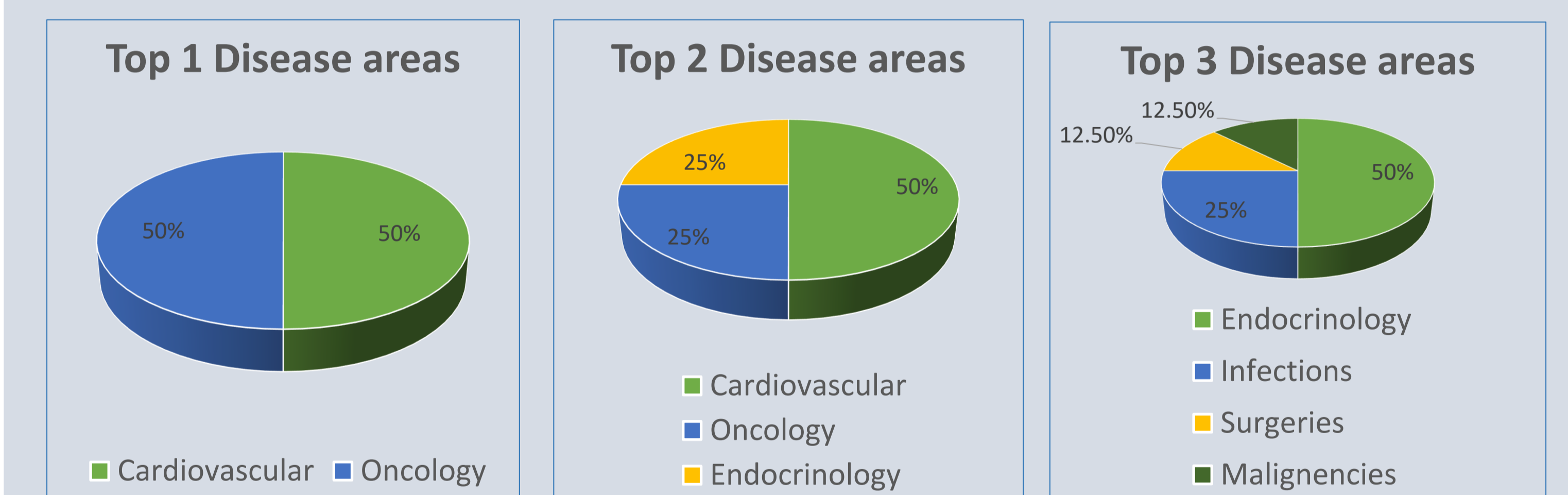


Figure 3: Top 3 Disease areas in the MENA Region

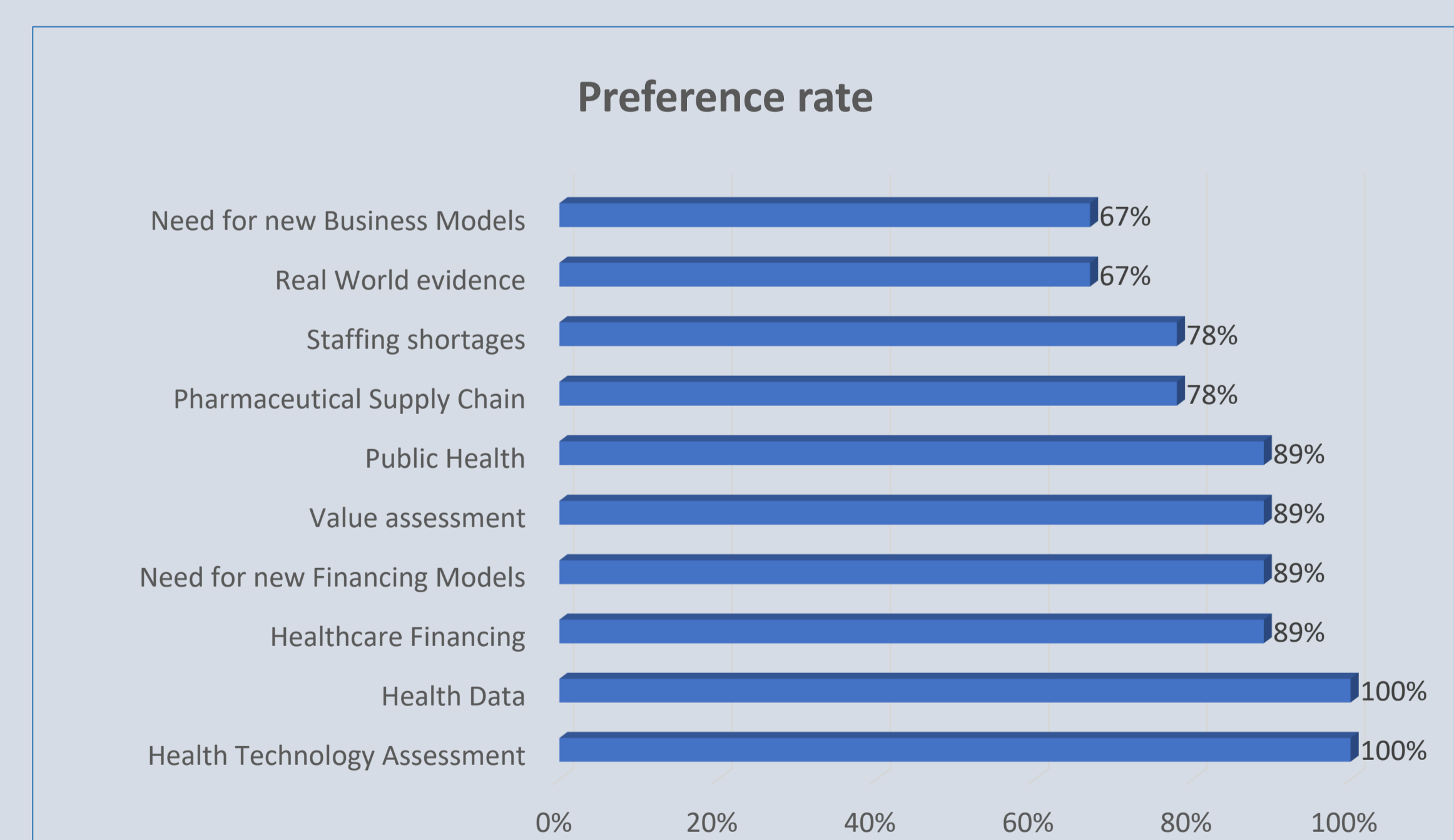


Figure 4: Key trends and Priorities preference rate