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Rethinking Arabian Healthcare

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#RethinkingArabianHealthcare

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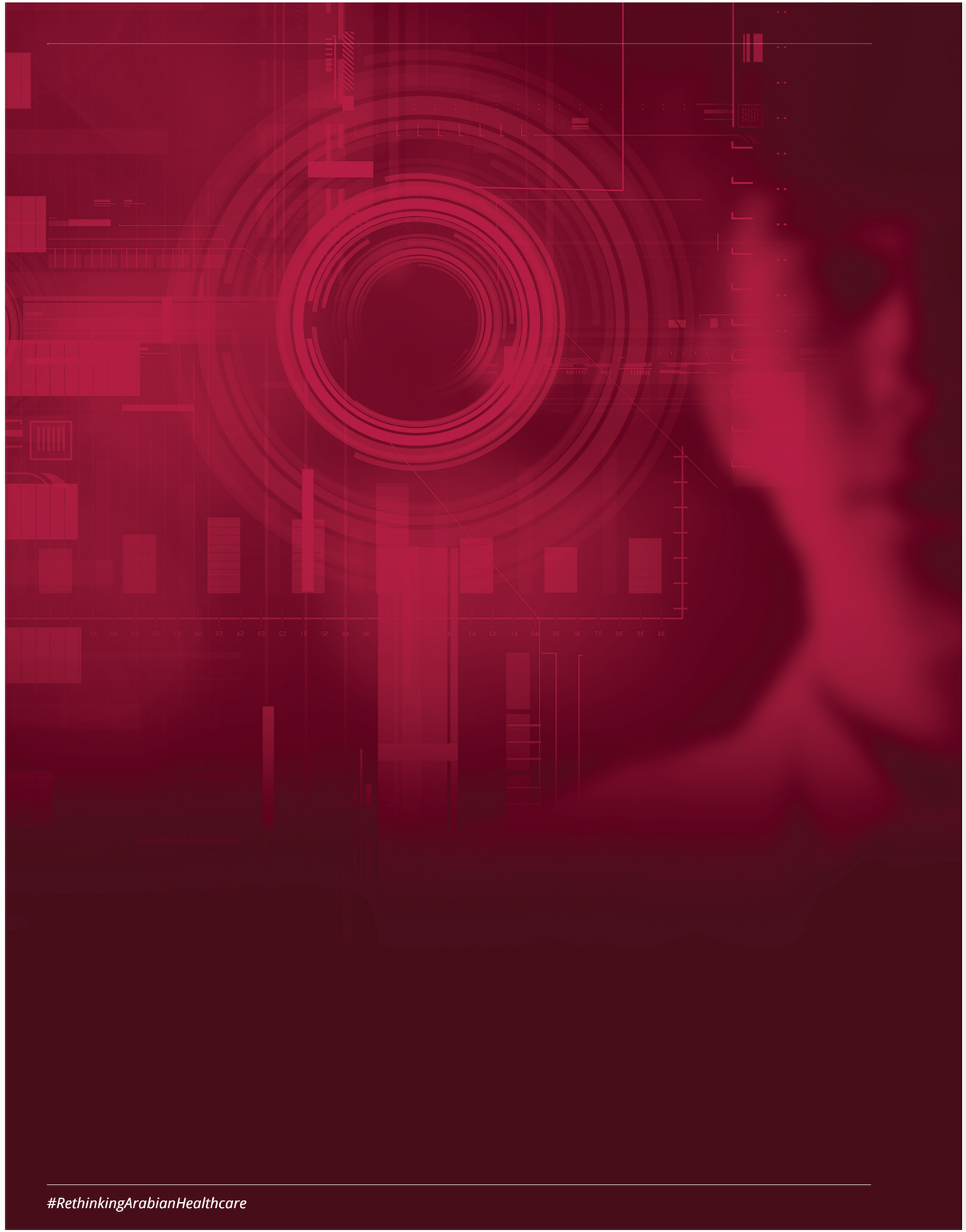

#RethinkingArabianHealthcare

Acknowledgements

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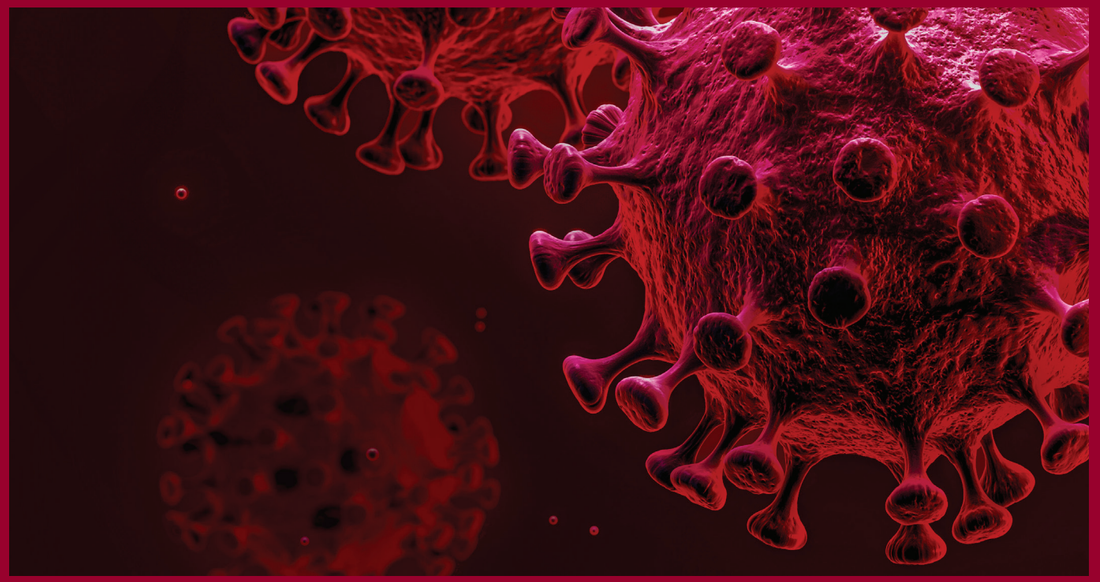
Rethinking Arabian Healthcare in a Post-Pandemic World



The coronavirus outbreak has put healthcare systems across the world under tremendous pressure, exposing shortcomings in service delivery. Twenty-eight million elective surgical procedures were cancelled globally in the first half of 2020, causing a huge backlog of around 45 weeks[1]. In the Gulf, 262,000 cases had been cancelled by mid-2020[2], placing a heavy burden on healthcare systems, hospitals, medical staff, first responders and patients.

As governments of the GCC continue to grapple with how to stop the spread of the novel coronavirus, they have taken unprecedented steps to limit the long-term impact of a faster-spreading variant of the virus.

1 World Economic Forum. 2020. 28 Million Elective Surgeries May Be Cancelled Worldwide: How Non-Covid-19 Medical Care Is Suffering. [online] Available at: <https://www.weforum.org/agenda/2020/05/covid-19-elective-surgery-cancellation-cancer-pandemic/>

2 Kas.org.kw. 2020. Kuwait Association of Surgeons [online] Available at http://kas.org.kw/covid-19.html

In the United Arab Emirates, over six million people were inoculated by the beginning of March 2021[3]– a figure that constitutes 60% of the population[4]. Saudi Arabia, which has taken the unprecedented move of suspending Umrah pilgrimages[5], launched its vaccination program across 550 clinics in Riyadh, 84 clinics in Jeddah and another 84 in the eastern city of Dhahran[6]. Other countries in the region, such as Kuwait, offered an electronic vaccination certificate- an "immunity passport" - to those who take the second dose of the vaccine[7] and imposed strict social distancing measures, with violators facing heavy penalties, including jail, for breaching safety rules.

Today, the opportunity arises to re-examine health systems to improve quality of care and increase efficiencies in service delivery, with the aim of better protecting populations from the long-term repercussions of the virus.

What lessons have governments in the Gulf learned from the pandemic? How can these learnings be implemented to future proof health systems, in a rapidly changing context?

In an attempt to answer these questions, the ***Rethinking Arabian Healthcare webinar series*** engaged with healthcare experts and thought leaders from across the Gulf and beyond[8] to re-examine healthcare systems and propose sustainable solutions.

3 The United Arab Emirates vaccinated over six million people by beginning of March 2021 (should be numbered as in the case of Q3) with the source included below with the other references (source - https://gulfnews.com/uae/health/more-than-6-million-covid-19-vaccines-administered-in-uae-1.76856645)

4 Mohap.gov.ae. 2020. UAE First Country Where Number Of Covid-19 Tests Exceeded Population: Official Spokesman - Ministry Of Health And Prevention - UAE. [online] Available at: <https://www.mohap.gov.ae/en/MediaCenter/News/Pages/2600.aspx>

5 Ft.com. 2020. Saudi Arabia Bans Mecca Pilgrimages Over Coronavirus Fears. [online] Available at: <https://www.ft.com/content/b57610e4-5926-11ea-abe5-8e03987b7b20>

6 Ramadan Al Sherbini, C., 2021. Saudi Arabia: Covid-19 Vaccine Jabs In 48 Hours After Registration. [online] Gulfnews.com. Available at: <https://gulfnews.com/world/gulf/saudi/saudi-arabia-covid-19-vaccine-jabs-in-48-hours-after-registration-1.76303315>

7 Yasmena Al Mulla, C., 2021. Kuwait: 20,000 Receive Covid-19 Vaccine. [online] Gulfnews.com. Available at: <https://gulfnews.com/world/gulf/kuwait/kuwait-20000-receive-covid-19-vaccine-1.76529656>

8 Refer to the acknowledgements section on pages 2 and 3 for the full list of participants

Investing smart in healthcare

Countries in the Gulf spend, on average, 4.4% of their GDP on healthcare[9], with healthcare-related expenditure growing from $60 billion in 2013 to $76 billion in 2019 and expected to reach $89 billion by 2022, according to a KPMG report[10]. These funds have gone to growing the number of hospitals, strengthening healthcare services and implementing new technologies among other focuses.

So what should be the first step towards investing smart in healthcare and what role should this play in improving hospital management, patient care and the overall healthcare system in the region?

1. Investing in structural reform

Covid-19 has provided an opportunity to further improve healthcare systems and engage in structural reform, agreed the panelists.

With the cancellation of 28 million surgeries globally and the ensuing global backlog this has created, hospitals have come under increased pressure to cope, necessitating the implementation of elements crucial for recovery. According to Richard Stolz, Associate Director at KPMG Lower Gulf, these factors include operational readiness, evaluating workforce capacity, and making sure that effective procurement methods and policies are in place at both the regional and global levels. "The workforce will come out of this pandemic very fatigued and it is key to have the volume of a motivated workforce and the right skills in place for hospitals to cope with the increased backlog."

Stolz went on to mention the importance of prioritizing the urgency and complexity of surgeries, to decide which ones are absolutely essential for the patients and which ones can be postponed.

The panelists agreed that when systems around the world reintroduce elective procedures, healthcare providers and systems managers should not go back to the way things were but seize the chance to do things differently.

"There is a great opportunity here to have a really good conversation about how and what we introduce from the past, rather than just turn it all back on again and get back up to capacity. I hope we can get to a far better place than we were," said Craig Barratt, Senior Advisor to the Centre for Improving Value in Health in KSA.

"Elective procedures have a bit of a naming problem; just because they are called elective does not make them less life-saving or important," he continued.

"It is very important that we are able to put the pandemic behind us because it is putting a lot of health issues and businesses on hold and that is just not sustainable," said Anastasia Amoroso, Executive Director and Head of Cross-Asset Thematic Strategy at J.P Morgan Private Bank. "This year, because people are not coming to the hospital, we have had 7% less cancer diagnosis done and it's not because cancer went away or declined by 7%, it's because people have not been going to their screenings and general checkups." Again, this is an opportunity to engage in structural reform moving forward post pandemic.

Another element that needs to be examined is the regulatory framework for digital healthcare now that solutions like predictive monitoring and telemedicine have become part of patients' lives, especially that of senior citizens. "Regulatory framework regarding what kind of diseases can get telehealth coverage and what the insurance model will look like will need to be enhanced moving forward," said Stolz.

"Telehealth solutions are developing very quickly in the UAE. We have a couple of private sector players who have completely embarked on the telehealth journey and enabled remote consultation and monitoring successfully," he said. "The question is still how will the policy and regulatory framework be built around that."

9 Statista. 2020. GCC: Share Of GDP Expenditure On Health By Country 2017 | Statista. [online] Available at: <https://www.statista.com/statistics/672429/gcc-share-of-gdp-spending-on-health-sector-by-country/>

10 KPMG. n.d. UAE Leading The Regional Healthcare Sector. [online] Available at: <https://home.kpmg/ae/en/home/insights/2019/06/uae-leading-the-regional-healthcare-sector0.html>

Investing smart in healthcare

2. Investing in cognitive diversity and people

The role of healthcare workers in innovation should not be overlooked. Dr Susie Perks-Baker, founder and programme director for Pioneer- the National Leadership Development Programme for senior Saudi women, underscored the important role of a global workforce that is receptive to these changes. "As massive as the transformation of how we think of healthcare is, none of it would make much sense without a global workforce that understands the transformation and their role in it," she explained.

What has really been impressive, says Perks-Baker, is the leadership and clinician adaptability during Covid-19: "In the Kingdom of Saudi Arabia, (...) the quick learning of the workforce has been impressive, same for the fact that different practices have quickly been implemented in healthcare delivery." A learning that has come out of the pandemic and that will be taken forward.

"There is this perception that others learn from what goes on in healthcare systems in the West. I was thinking actually Saudi Arabia and the Arabian Gulf have a great deal of experience in the Covid virus, both in this version and others before like SARS and MERS. If anything, the expertise lies in the Arabian part of the world, rather than other parts," she continued.

More than 80% of doctors in training in the United Kingdom say disruption caused by Covid-19 reduced their access to the learning they need to progress in their career, according to a survey by the General Medical Council (GMC) published in October 2020[11]. Referred to by Perks-Baker, the study indicated that investments in medical training were neglected during the pandemic: "The business of still maintaining and not taking your eye off the ball of investing in your people is pretty crucial in my opinion," said Perks-Baker. "We also need to invest in massive global appreciation of the healthcare workforce and in cognitive diversity."

Moving forward, an important question to be kept in mind is 'who else should we invest in who will have something really helpful to offer, as we take new health systems forward?'

3. Investing in public and private partnerships

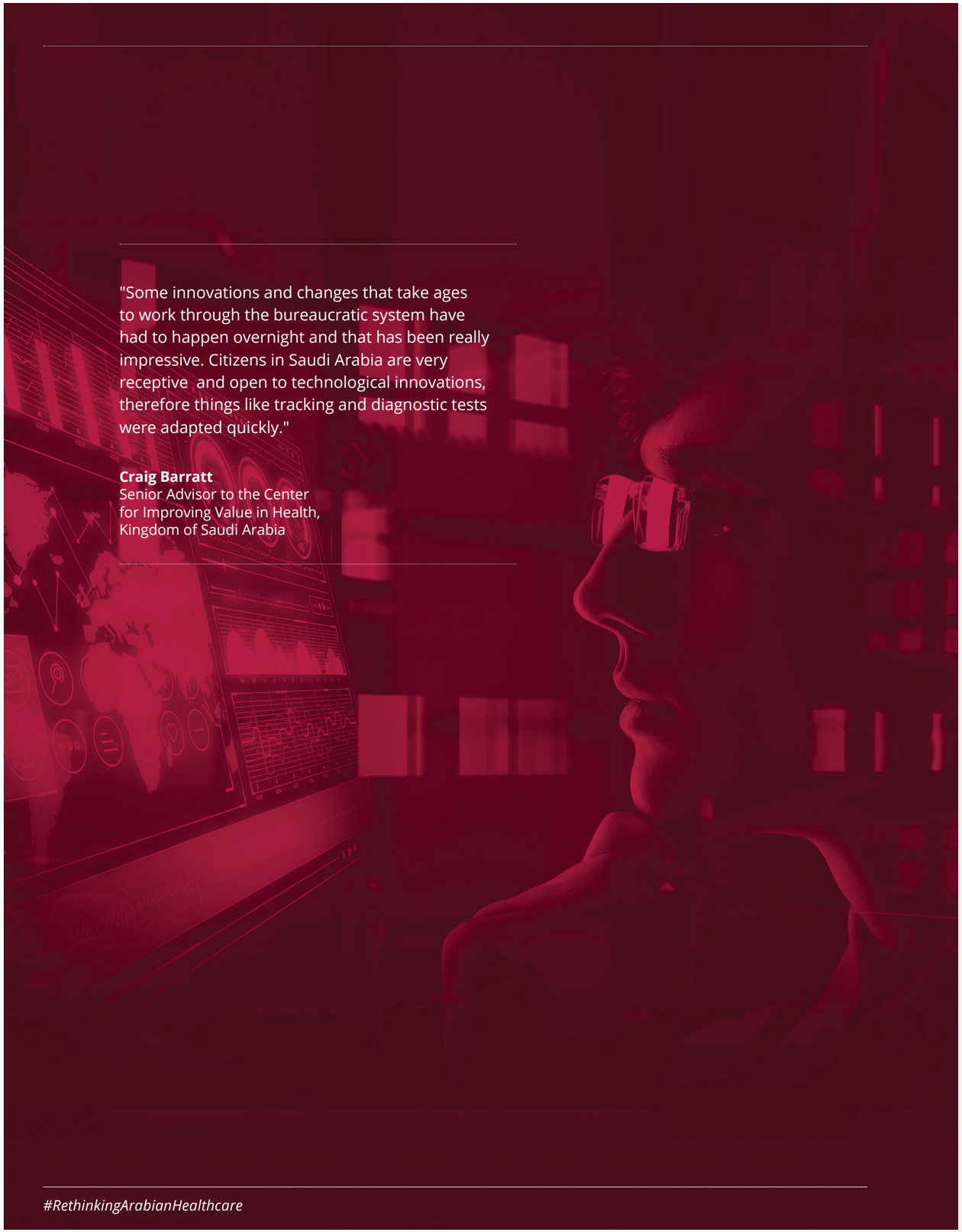
According to Barratt, public and private partnerships (PPPs) are a key component in the path to smart investment in healthcare. "One of the areas where Saudi Arabia has been particularly successful in the way it has handled Covid-19, is in its collaboration with the private sector. And this is valid across the three main areas that you would expect the need for collaboration within a pandemic: securing extra bed capacity and doing that incredibly quickly, (ramping up) testing capacity, massive expansion in testing and on very high levels of national coordination, along with local production of personal protective equipment."

Echoing the importance of a multi-stakeholder perspective when investing in healthcare, Amoroso stressed that the private sector can't go at it alone and neither can the public sector. "I'll give you just a few examples: when it comes to the Covid-19 vaccine development, the private sector could not have done it without the public funding. Also, the private sector couldn't have done it unless the FDA in the United States and other regulatory authorities were willing to accelerate the timelines for approval, to use emergency use authorization for some of the vaccines and the antivirals; therefore this is a very important collaboration."

Another example of successful PPP mentioned during the webinar sessions was around precision medicine. "Precision medicine is about getting enough data, whether it's medical or genomic records (...) as the government authorities are going to play a key role in allowing the collection of some of the genetic databases", explained Amoroso. "For some of the gene and cell therapies, the true breakthroughs for the unmet medical needs is the fact that governments are prioritizing finding treatments and maybe cures for those needs, which means that they are able to help place it on the accelerated path."

"In terms of where PPP can and should go now post pandemic, we need to both review existing deals in the new context and look at new deals through a new lens acknowledging that the facts on which we make such decision has changed," added Barratt.

11 Gmc-uk.org. 2020. Covid Disruption Hits Training For Eight In Ten Doctors GMC Surveys Shows. [online] Available at: <https://www.gmc-uk.org/news/news-archive/covid-disruption-hits-training-for-eight-in-ten-doctors-gmc-surveys-shows>



"Some innovations and changes that take ages to work through the bureaucratic system have had to happen overnight and that has been really impressive. Citizens in Saudi Arabia are very receptive and open to technological innovations, therefore things like tracking and diagnostic tests were adapted quickly."

Craig Barratt
Senior Advisor to the Center
for Improving Value in Health,
Kingdom of Saudi Arabia

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Investing smart in healthcare

4. Investing in healthcare innovation

Innovation in healthcare is happening at lightning speed and is driven by both the urgency Covid-19 has created and the recent advancements in medical technology in Artificial Intelligence (AI).

“The fact that we are able, in a matter of seven to eight months, to produce 44 different vaccines which are now in clinical human trials is a significant step forward for healthcare innovation,” said Amoroso, comparing this to how it took five years to get the vaccine for Ebola virus, a rare disease which had widespread outbreak in Western Africa in 2013, approved.

“Some innovations and changes that take ages to work through the bureaucratic system have had to happen overnight and that has been really impressive,” explained Barratt, “Citizens in Saudi Arabia are very receptive and open to technological innovations, therefore things like tracking and diagnostic tests were adapted quickly.”

The investment community is taking notice of the opportunities in healthcare innovations, according to Amoroso. These innovations go beyond coronavirus related ones and into cardiovascular disease and cancer, the top contributors to healthcare burden of disease. “We are on the cusp of innovations to treat those diseases. Investors are looking to invest in diagnostics and testing but also on the therapeutic side,” Amoroso continued. Some of these innovations include minimally invasive technologies, which have thrived in recent years, contributing to hospital efficiencies, reducing recovery time for patients as well as ICU dependencies.

On his part, Stolz highlighted that investing smartly in responsible innovations leads to outcomes such as increasing the sustainability of healthcare systems, fighting healthcare inequalities and reducing the burden on hospitals. “Recent developments were aimed at reducing hospital footfall. An example of that is the delivery of healthcare services in the UAE where patients were wary of visiting hospitals because of the pandemic,” he explained. “Telehealth solutions are developing very quickly with key private sector players embarking on the journey of enabling remote consultation and monitoring successfully.”

5. Investing in outcome-driven and value-based health systems

Governments have become much more aligned around outcomes, value, prevention and thinking at population health level. Barratt pointed out the increased level of personal ownership demonstrated by the population over its healthcare, to wear a mask and maintain safe distance.

“This transformation has been going for almost three years now and the pandemic is only going to accelerate this change towards more value-based outcomes. The true innovation that supports Saudi Arabia’s move towards being a value-based healthcare system is around understanding and measuring outcomes and then responding on the back of it,” he explained. “Measurement is fundamental to start being able to transform the system.”

“In the United States, we spend a lot of money on healthcare and we don’t necessarily get the best results. Looking at our metrics around obesity, cancer and diabetes we know we are not getting the best results that we can. So the true success is the patient outcome and making sure that we are as efficient with our healthcare dollars as we can be”, added Amoroso.

By investing smart in healthcare, leaders can protect their countries against the health challenges of the future, build strong economies and promote thriving communities.

Chasing value as AI and technology reshape the healthcare sector

In the Arab world, there has been a great focus on the adoption of technology. However, can this lead to better outcomes for Covid-19 patients, and also in areas such as cardiovascular disease? By investing smartly, how can the burden be reduced to improve efficiencies and increase sustainability of healthcare systems?

And what can the healthcare industry learn from technology and AI solutions created to fight coronavirus to improve patient care across the globe and beyond coronavirus to chronic diseases such as heart disease?

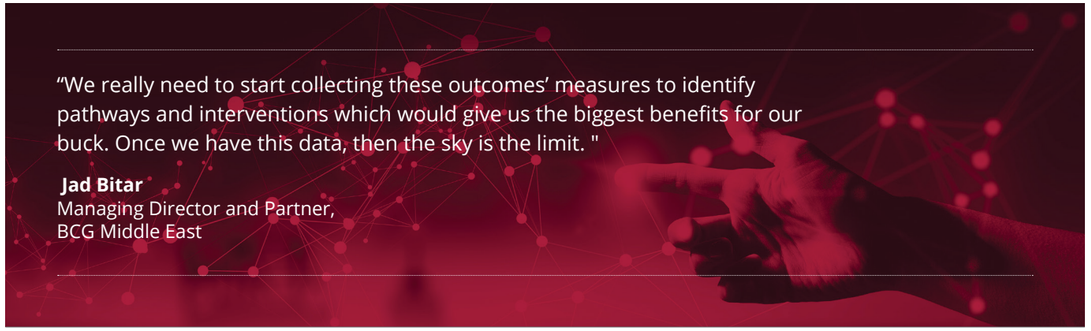
1. Focusing on protecting our future

The UAE has focused on adopting AI in the past few years, and effectively demonstrated it could leverage it to minimise the impact of Covid-19. “Predictive analysis is one of the key benefits of AI and deep machine learning and has proved effective during the pandemic. By using increasingly sophisticated algorithms, it can be used to create an accurate picture of a fast-moving pandemic,” said Marwan Abdulaziz Janahi, Managing Director of Dubai Science Park.

As a result, AI was deployed to track and analyse the virus, as well as support scientific research in order to understand disease pathogens and synthesise vast volumes of data. “Developing AI-powered solutions – especially predictive modelling and automated services – could certainly help governments, non-governmental organisations, research groups, academics and other stakeholders spot the writing on the wall of a future pandemic,” he continued, citing the example of the World Health Organization, who has deployed AI-enabled services to offer accurate information to millions of people and respond more quickly to Covid-19.

Janahi also highlighted the importance of integration: “We have to be able to integrate all of these decisions on a symptom level or a trend level. It is really a collective effort between governments, physicians, scientists, technology providers and researchers.” Integration which would enable data sharing in a city, country or region can contribute to better decision-making, hence better outcomes for patients. It is not a question of adopting the technology which constitutes the challenge, according to Janahi, highlighting the importance of putting the best practices together to create a model that works for the region.

On a national level, the UAE has continued to invest significantly in its healthcare infrastructure to create a world-class medical ecosystem. At Dubai Science Park, a new neuro-spinal hospital that will provide specialist radiosurgery treatments will open its doors in the near future, contributing to the provision of high-quality patient care in the country.



Chasing value as AI and technology reshape the healthcare sector

2. Focusing attention on the 20% of the population that consumes 80% of the medical cost

“History is going to judge leaders around the world in respect to how they balance between saving lives and saving livelihoods,” said Raouf Khalil, CEO and Founder of Trudoc 24x7, a population health management provider which offer telemedicine and telemonitoring services. “Based on this, we decided to focus our attention on the 20% of the population that consumes 80% of the medical cost. So, we simply were able to use technology to focus on that population group because if you don’t impact that 20%, you will not be able to move the needle in terms of cost and patient satisfaction,” he added.

According to Khalil, healthcare is all about the relationship between the patient and doctor. “Our primary focus is elderly patients with chronic conditions. We really need to understand what they need from their perspective, rather than what we can give them through technology. I am a big believer in technology, but I am also a believer in giving people what they want, not what we think they want.”

Prior to the Covid-19 pandemic, the adoption of teleconsultations in the US or China was limited. “During the pandemic, in China, we saw the adoption of technology multiplied by 11 times, both from the physicians’ and patients’ side,” explained Jad Bitar, Managing Director and Partner at the Boston Consulting Group, underscoring the impact Covid-19 had on creating the urgency to adopt technology which will likely remain in place post pandemic. “If we assume that a General Practitioner in the GCC can see 20 patients a day, with teleconsultation this can be taken up to 40 without loss of quality. The equivalent of 2.5 times improvement in terms of productivity.”

With the technologies available today, capacities can be managed at the national, regional level and hospitals level almost in real time. “We has developed web-based tools with almost an inherent rules-based engine that allows us to identify capacity at any one of our facilities and be able to identify where volumes are coming and hence be able to manage supply and demand,” Bitar mentioned.

The goal of matching supply and demand allows to reduce waiting lists and also better plan resources in terms of caregivers, beds and equipment. On the other hand, the ability to predict surge or future demand will allow for better preparedness. “One of the biggest concerns in being able to serve the current demand is the sub-optimal management of our resources such as length of stay in hospital or occupancy,” Bitar continued.

3. Leveraging data and measuring outcomes

Covid-19 has highlighted the importance and power of data, particularly outcomes data which play an essential role in harnessing the power of AI and technology, according to Bitar. “We really need to start collecting these outcomes’ measures to identify pathways and interventions which would give us the biggest benefits for our buck. Once we have this data, then the sky is the limit. We can really start intervening very early on at the behavioural level to encourage prevention.” Intervention at treatment level would also prove effective to identify which treatments are effective and which ones healthcare providers continue to use without any proof of added value to patients. “Today, health systems rely on trial and error but with the right incomes data, this will be greatly reduced. This will save time and be more efficient for patients’ well-being and for saving cost on healthcare providers, the patients and the national level.” Outcomes data can also be used to reduce length of stay for certain procedures to the national standards.

Bitar claims that data is readily available in the UAE, specifically Dubai and Abu Dhabi, but less so in other countries in the GCC. “I am involved with a few governments in the region where we were able to come up with models to predict, measure and forecast some of Covid’s impact, which could serve as a guideline for other diseases, such as cardiovascular diseases. It also helps identify which programmes could work on which microsegments and finally which treatments are effective and which are not,” he continued.

Dr. Ahmad Nabeel, Founder of Gulf Medical Technologies and Researcher at the Institute of Global Health Innovation believes that having good quality data is the fundamental basis for smart technology. “We in the Middle East are making the first steps towards having solid infrastructure for collecting data. For instance, in Kuwait, we had two conferences: the first telehealth conference in the GCC and another on digital health.”

“Something being driven by the Saudi Council for Health Insurance which is a platform called Nafees is basically bringing all of the public and private providers’ data together. In my opinion this will be revolutionary not only for Saudi Arabia, but for the Gulf,” continued Bitar.

Janahi, for his part, echoes the importance of data in research, clinical trials and training, among other areas, and points out the need for awareness surrounding the disclosure of personal information. “We have to remember privacy of data; the information that belongs to me is as private as my bank account. This is one of the key things that a lot of governments are asking for; local data storage,” he said. “Data is definitely important, but we have to be aware of how we protect it because today, data is everywhere in our lives and we need to make the best use of it while preserving it in the right way.”

Chasing value as AI and technology reshape the healthcare sector

4. Building a strong digital infrastructure to foster innovations

Kuwait is making interesting progress in terms of investing in smart technology and in building the digital infrastructure needed to grow these innovations. “One interesting outcome is the platform that was applied in Al Amiri hospital in Kuwait, which was utilised during the pandemic and was very helpful. It featured the telehealth services where you had virtual clinics, online delivery services for drugs, booking appointments etc.”

According to Nabeel, investing in smart technology is not just the responsibility of governments; the private sector has a bigger role to play. “I believe we need to shift the focus of investments towards innovation. We should ask ourselves why aren’t there enough investments in our region in healthcare? Without investments, ideas will remain ideas. We need to encourage people who are willing to take the risks to make ideas happen,” he continued, with the risks not only being financial, but also encompassing time and effort. “We need to find people who are willing to do that and de-risk the process for them as much as possible.”

Keeping an eye on maintaining a steady flow of innovators and ideas is as important as securing investments in innovation, according to Nabeel. “Approximately only 2% of patents become prototypes and only 1% of those become successful products in the market. We need to keep that flow running so that we can have a wide selection of inventions,” he continued, “building a system where innovators are encouraged to take risk and transform their idea into something tangible.”

“As the healthcare industry continues its path towards digital integration, the UAE has ensured there is an enabling environment and robust regulatory ecosystem to protect patients and promote ease of doing business,” added Janahi.

"Hospitals will be under pressure to cope with the backlog from cancelled surgeries going forward, therefore the path to recovery calls for operation readiness, looking at workforce capacity, temporary expansion of workforce and making sure that effective procurement methods are in place."

Richard Stolz
Associate Director,
KPMG Lower Gulf

The path forward

With vaccines being rolled out across multiple countries, the Arab world has moved into a more hopeful phase of dealing with the pandemic.

Healthcare regulators, however, are faced with the challenging task of ensuring that the lessons learned during the worst of the pandemic in 2020 are not forgotten and that the clock is not re-set to the pre-coronavirus default way of delivering services to patients.

1. Catalyzing policy changes

"Covid has been a very positive disruptor for the healthcare system within the UAE. The coronavirus crisis was a catalyst for major changes in our policies and regulations in relation to telemedicine and the utilisation of virtual platforms for the delivery of healthcare," said Dr Omniyat Al Hajri, Director of Community Health at the Center of Public Health Abu Dhabi.

"That has been in the pipeline for many years and we've had small projects that were on the ground, but Covid-19 coming and disrupting the whole healthcare delivery model resulted in a very positive adaptation," she continued.

Al Hajri gives the example of how, early in the pandemic in March, the Department of Health in Abu Dhabi authorised all healthcare workers to use the remote digital platform it had developed to interact with their patients in everything from scheduling their appointments to delivering their medications and even conducting telemedicine appointments.

"Another interesting change was the ability for healthcare professionals to support other institutions that they had not been licensed to work in previously. So we had that fluidity of healthcare professionals from one institution to the other, based on the goodwill and agreement between institutions to deliver the best services where they are needed," said Al Hajri.

2. Data sharing

Dr Panco Georgiev, Partner, Healthcare Systems and Services Practice at global consulting firm McKinsey & Company spoke of the importance of sharing big data which allows for many additional benefits, including predictive monitoring of patients, which can reduce complications, hospital lengths of stays and costs overall.

"Coronavirus accelerated the central availability of information across the Gulf. When you think of topics like clarity around supply chain or availability of workforce, the acceleration of information we have in the GCC is amazing. These are topics that a lot of policymakers have wished to have for over a decade and suddenly it is starting to be available," said Georgiev.

Abu Dhabi relied on connecting the bits and pieces of data they had on their population to create a comprehensive unified database which facilitated communication with senior citizens and those with chronic conditions and essentially allowed for the creation of personalised healthcare.

"In Gulf countries, we were lucky because our leadership stated the priorities from the beginning with human life coming first, second and third. The first question we had in mind was not only how we would deal with the crisis but also what will happen to the rest of the community that needs attention, such as senior citizens and people with chronic diseases," said Al Hajri.

Abu Dhabi Health piloted a project where they communicated with 2,000 senior citizens across the Emirates, said Al Hajri, to gauge sentiment. "That pilot made us realise that a lot of those patients were delaying treatment because of their fear of catching Covid in the hospital. So we actually identified from our database all the citizens above 60 and those that have chronic diseases and we divided them among five major providers and allocated them with the responsibility of reaching out to these patients to identify their needs and support them in either getting the appointments they need or using telemedicine and have their medication delivered to their houses.

"In worst-case scenarios, we asked for the mobilisation of healthcare providers to those patients who have needs that cannot be attended to virtually. We learned a lot from this programme and we would love to see elements of it continue after the crisis," explained Al Hajri.

The path forward

3. Ensuring continuity of care

While healthcare facilities were dealing with coronavirus, a backlog of elective surgeries was created, with one report indicating that 31,000 elective surgeries were cancelled in Kuwait over 12 weeks. It was in part created because of patients' wariness of visiting healthcare facilities when faced with health issues, and in part due to the halt of elective procedures during the pandemic.

At the beginning of the pandemic, Kuwait paused elective surgeries for emergency cases but resumed them in July, in order of priority. "What is unique in Kuwait is that the private sector played a major role. Since they were not allowed to admit Covid-19 patients, they were allowed to play the role of free-zone hospitals and admitted elective surgeries, after ensuring safety of course," said Dr Salman Al Sabah, Assistant Vice President for Research and External Collaboration at Kuwait University and Advisor to the Minister of Health in Kuwait.

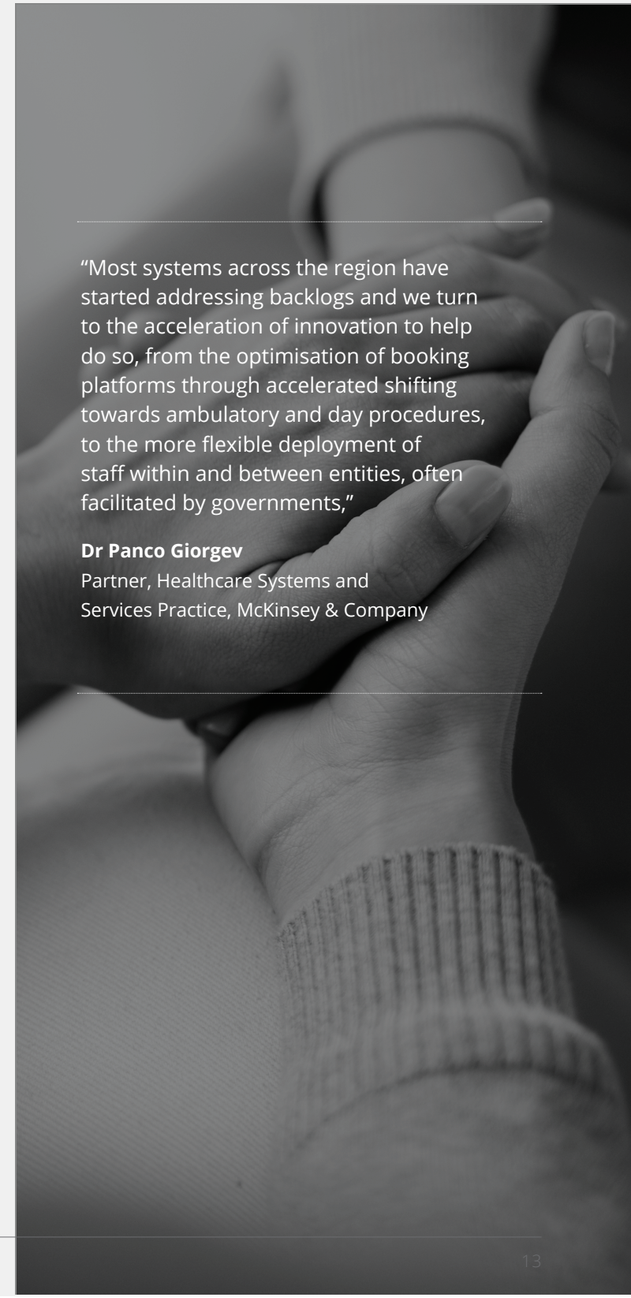
"We established committees within each hospital and they would decide, based on their own hospital needs, resources and number of Covid-19 cases, when to resume elective surgeries. These reports were presented to leadership to oversee them and make sure we are not overdoing it and risking increasing the number of Covid-19 cases again," he continued.

The UAE trusted in the resiliency and judgement of its healthcare system to determine whether or not to take on elective surgeries, said Al Hajri. "What we decided to do as a regulatory body was to allow businesses and healthcare providers within their institutions to decide [whether to have elective surgeries or not]. This allowed us to better navigate during the critical period and we did not block businesses or ask them to stop elective surgeries, but what we did was call for the best judgement of healthcare providers on the ground to assess the risks," said Al Hajri.

"We had robust inspections throughout to ensure that maximum measures are taken for safety. We then allowed the community to communicate with their providers through the digital platform and ensured the continuous dialogue between them on deciding what procedures need to be carried out," she continued.

McKinsey & Company's quarterly healthcare consumer sentiment survey indicated that 47% of patients in the UAE and 43% in KSA are planning to delay elective procedures due to coronavirus, said Georgiev.

"When we asked people what would instill confidence for them to go to the hospital or physician they said they wanted to feel safe, to see a clean facility and no crowding," Georgiev explained. "Healthcare facilities are trying to reassure them and we have the examples of those that re-configured their waiting areas or pharmacies that were providing 24-hour services in Saudi Arabia. But we really need to continue working on that considering the stark number of people who are not comfortable going back to hospitals," he continued.



"Most systems across the region have started addressing backlogs and we turn to the acceleration of innovation to help do so, from the optimisation of booking platforms through accelerated shifting towards ambulatory and day procedures, to the more flexible deployment of staff within and between entities, often facilitated by governments,"

Dr Panco Giorgev
Partner, Healthcare Systems and Services Practice, McKinsey & Company

Key Recommendations

Below is a summary of the key recommendations discussed during the *Rethinking Arabian Healthcare* webinar series:

Investing smart in healthcare

1. Investing in structural reform:
- Investing in operational readiness
- Evaluating workforce capacity
- Ensuring effective procurement methods and policies are in place
- Ensuring the right regulatory framework for digital healthcare

2. Investing in cognitive diversity and people:
- Investing in a workforce receptive to change
- Investing in a workforce capable of implementing practices quickly
- Maintaining investment in medical training during Covid-19
- Investing in massive global appreciation of the healthcare workforce

3. Investing in public and private partnerships:
- Utilizing PPPs to fill gaps in niche areas in the provision of healthcare services
- Investing in PPPs to facilitate access to data for research
- Joining forces to accelerate approval timelines and facilitate emergency authorizations

4. Investing in healthcare innovation:
- Going beyond Covid-19 to cardiovascular diseases and cancer, top causes of death in the region
- Investing in diagnostics and testing
- Investing in minimally-invasive technology
- Investing in responsible innovation to increase sustainability of health systems

5. Investing in outcomes-driven and value-based healthcare:
- Understanding and measuring outcomes
- Focusing on patient outcomes
- Focusing on smart spending

Chasing value as AI and technology reshape the healthcare sector

1. Focus on protecting our future:
- Leveraging AI to minimize the Covid impact
- Utilizing predictive analysis to create an accurate picture for treatment
- Supporting scientific research to understand pathogens and synthesize data
- Integration at symptom or trend level for better decision-making
- Putting best practices together to create world-class medical ecosystem

2. Focus attention on 20% of population answering 80% of the medical cost:
- Focusing on how to balance between saving lives and livelihoods
- Focusing on elderly patients with chronic conditions and what to give them through technology
- Focusing on capacity management through technology to reduce waiting lists and better plan resources (caregivers, beds, equipment)

3. Leveraging data and measuring outcomes:
- Start collecting outcomes' measures to identify the most beneficial pathways and interventions
- Using data to intervene early at the behavioral level to encourage prevention
- Identify which treatments are effective and which ones healthcare providers continue to use without any added value to patients
- Using outcomes data to reduce length of stay for certain procedures to the national standard
- Building solid infrastructure to collecting data
- Being aware of how we protect and preserve data

4. Building a strong digital infrastructure to foster innovations:
- Shifting the focus of investments towards innovation
- Maintaining steady flow of innovators and ideas
- Building a system where innovators are encouraged to take risks and transform their idea into something tangible
- Creating an enabling environment and robust regulatory ecosystem to promote ease of doing business and protect patients

Key Recommendations

The path forward

1. Catalyzing policy changes:
- Related to telemedicine and the use of virtual platforms for the delivery of healthcare
- Encouraging healthcare professionals to support other institutions to deliver the best services when they are needed

2. Data sharing:
- Allowing for predictive monitoring
- To reduce complications
- To reduce hospital lengths of stay
- To reduce overall cost

3. Ensuring continuity of care:
- Partnering with private sector to help ensure hospital safety to reopen elective surgeries during the pandemic
- Establishing hospital committees to decide, based on needs, when to resume elective procedures
- Regulatory bodies allowing healthcare providers to decide whether to reinstate elective surgeries or not to better navigate the critical period
- Turning to innovation to help in addressing backlogs

4. Sustaining innovations post pandemic:
- Maintaining continuity of innovations
- Looking at which innovations are needed now and that will make a difference
- Investing in the workforce of the future
- Accelerating investment in digital health solutions
- Investing in R&D in order to have more data that would guide decision-making

For more information:

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