



SECTOR PROFILE

Healthcare

Overview of the Healthcare Sector in Jordan

The Jordanian healthcare sector is known for its high-quality services, both regionally and internationally, due to the presence of world-class internationally qualified medical workforce and accredited hospitals and facilities equipped with state-of-the-art medical machinery and equipment.

Moreover, Jordan is considered one of the Middle East's most preeminent medical tourism destinations and a regional leader in pharmaceuticals production, with further growth likely to materialize in the upcoming years as a result of factors such as increased medical tourism from Saudi Arabia and other Gulf Cooperation Council (GCC) countries. Medical tourism alone attracts at least 250,000 patients¹ to Jordan per year, generating 66% of the country's overall tourism revenues.

The sustained growth in the number of publically and privately owned hospitals, the construction and upgrading of existing hospitals and medical centers, expanding health insurance coverage, and the shift from older conventional methods to modern treatment ones drive the demand for medical equipment and services. Moreover, imports currently supply approximately 80% of Jordan's demand for medical equipment.²

The Government of Jordan (GoJ) recognizes the competitive strength of Jordan's healthcare sector, which is reflected in Jordan's Vision 2025, which puts specific emphasis on the development of the healthcare and medical tourism clusters. In addition, the GoJ has implemented the e-health care initiative, which aims to ensure the accountability of the health care system and shall operate the storage, retrieval, and updating of patients' electronic health records by all participating healthcare facilities in Jordan. The healthcare in Jordan also meets international standards in terms of accreditation, the Health Care Accreditation Council (HCAC) is accredited The International Society for Quality in Health Care (ISQua). These factors all together contributed to the increase in medical tourism over the years.

Altogether, Jordan's healthcare proposition comprises the availability of top-tier medical staff, world-class hospitals and facilities, a strong proposition for medical tourism, and a wide clinical base, which collectively allow for the expansion of services offered to both foreign and domestic patients and drive investment opportunities.

¹ Medical Tourism Index, 2017.

² The International Trade Administration (ITA), U.S. Department of Commerce manages Export.gov, 2016.

	Number of Hospitals	Number of Hospital Beds
Private	62	4,496
Public	48	9,235
Total	110	13,731

Sources: Ministry of Health 2017

Investment Opportunities

Jordan’s healthcare industry totals about US\$ 3.58 billion, representing approximately 10% of GDP (as spent on this sector), which is among the highest in the Middle East and North Africa (MENA) region.³ Given the country’s existing competitiveness in terms of medical tourism; a healthcare-minded workforce; renowned hospitals and facilities; reforms on the private hospitals’ regulatory framework; and a growing market with increasing demand for world-class healthcare services in the region; a number of investment opportunities exist across a variety of healthcare niches.

01. Hospitalization

Nearly 86% of the Jordanian population is covered by health insurance originating from either public, private, military, or United Nations Relief and Works Agency for Palestine Refugees in the Near East (UNRWA) schemes - which is a high percentage compared to the MENA region. Jordan’s continued urbanization and population growth, together with the growing need for healthcare services and medical supplies in neighbouring countries, all turn the country into a regional platform for healthcare services. Moreover, the large influx of Syrian refugees during the last seven years demand suitable, sustained healthcare infrastructure and services.

To accommodate this growing healthcare market demand, a need exists for new private/public hospitals and medical centers in Jordan in the next five years, thereby particularly focusing on the larger cities of Amman, Zarqa, and Irbid. The construction of new hospitals will also trigger demand for both professional services and medical products.

The hospitalization segment does not only include basic healthcare infrastructure (such as hospitals and medical centers), but also provide investment opportunities in more high-end segments. This concerns companies looking to establish specialized therapeutic or medical centers that offer all specialties or a specific therapeutic ones, as well as medical centres and hospitals with 5-star services.

³ The International Trade Administration (ITA), U.S. Department of Commerce manages Export.gov, 2016.

02. Pharmaceuticals & Medical Devices

The demand for pharmaceuticals, medical devices, and medical supplies evolves along the increasing demand for new hospitals, medical centers, and healthcare facilities. Prospects include the manufacturing and production of human medicine, pharmaceutical drugs from medicinal plants, and medical supplies (such as medical gauzes, cylinders, instruments, needles, adhesive, diagnostic imaging equipment, testing equipment, cardiology and kidney dialysis equipment, equipment and supplies for plastic surgery, medical surgical sterilizers, medical x-ray, alpha, beta, and gamma ray equipment, orthopedic and prosthetic appliances, clinical lab diagnostic equipment, clinical laboratory equipment, organ transplant equipment, and consumables for clinical laboratories).

Jordan's existing Medical and therapeutic industries comprises more than 100 domestic factories, generating about 8,000 employment opportunities, covering all administrative and technical levels. The sector's output reached about US\$ 880 million in 2014, of which 80% was targeted for exporting purposes.

Moreover, the Jordanian pharmaceutical sector has accrued suitable manufacturing and technical expertise. Jordan has become a center for Good Manufacturing Practices (GMP) in the MENA region and expanded its pharmaceutical exports to more than 60 countries worldwide, including the Gulf, the US and Europe, all due to their high quality, excellent reputation and affordable prices.

The Jordanian medical device market is also projected to grow at an above-average rate of 9.3% per annum, the size of the pharmaceutical market in Jordan is estimated at \$ 1.3 billion.

The pharmaceutical sector in Jordan has benefited from the growth in MENA economies (mainly the Gulf countries) in recent years and is expected to do so in the near future, henceforth resulting in an increased government spending on the healthcare sector. Indeed, one of the main drivers for growth in Jordan's healthcare sector includes the continuing high-volume of medical export activity generated by the country's domestic drug manufacturers.

03. Medical Education & Services

The Kingdom hosts a rapidly growing laboratory segment, which is increasingly applying more sophisticated capabilities. In fact, less than one percent of the samples are sent out of the Kingdom for analysis, which is mostly the case of very specific medical testing not offered throughout Jordan. Nevertheless, investment opportunities emerge in education and services related to healthcare as the sector progresses. Examples of such services relate to consulting in hospital administration, education and training in quality control and certification standards, laboratory and hospital administration software, and laboratory reagents and diagnostics.

As the GoJ is implementing its e-health strategy, investment opportunities exist for a number of applications and services, including healthcare management systems, software modules for specific fields and applications, integrated medical insurance solutions, customer relations management, mobile healthcare applications, and online medical content providers.

04. Medical Tourism & Cosmetics

Medical tourism in Jordan, including patients' expenditure on medical procedures, accommodations, transportation and other types of services, generated more than US\$ 1.7 billion in 2015 and is expected to continue to grow over the next years, due to global ageing and the increasing expenditures on healthcare and tourism. As such, investment opportunities, such as medical tourism facilitators, health spas, wellness centers, physiotherapy, Dead Sea cosmetics, and mud processing and refining are prevalent in order to accommodate medical tourists and cater to their needs.

Why is Jordan the right location for your next corporate investment?



The Kingdom of Jordan is a stable, business-friendly, modern, and prepared location for your next engineering, manufacturing, information technology, or life sciences activities in the Middle East and North Africa (MENA) region. This dynamic nation provides a sound environment from which companies can find key talent, business assistance, and a willing Government partner who will help enable their growth into the MENA region and beyond.



Stable Focal Point for the MENA Region

A business-oriented Government and reliable public and private institutions.



Comprehensive Network of Trade Agreements

Features privileged access to over one billion consumers around the globe.



Ease of Doing Business

In terms of utilities, taxation, and trading across borders.



Attractive Incentive Packages

Investment and fiscal incentives, guarantees, and loans are available for investors.



Sound Investor Protection Regulation

Investment Law No. 30 of 2014 sets out privileges and guarantees for investors.



Advantageous Development Zones, Free Zones, and the Aqaba Special Economic Zone



Stable Financial Market

Featuring ease of access to loans and venture capital.



Competitive Labor Market

A strong focus on higher education, training, innovation, and business sophistication.



Unique Treatment of Investors

Welcomes investors into Jordan with a red carpet treatment as well as via customized support from the Investment Window dedicated to provide a soft landing of investment.

QUICK FACTS



Capital
Amman



Time Zone
GMT +2



Population
9.5 million (2016)



Currency
Jordanian Dinar (JOD)



Total GDP
US\$38.65 billion (2016)



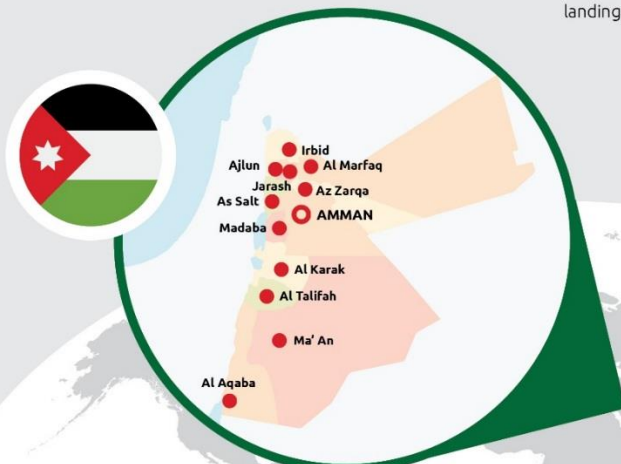
Annual GDP Growth
2.0% (2016)



Exports
US\$13.58 billion (2016)



Imports
US\$21.62 billion (2016)



Sector-Specific Location Advantages

The healthcare sector in Jordan is featured with sound policies and enabling regulations for business operators and investors alike: the infrastructure is solid and the national policies customized to healthcare operations and cutting-edge technologies both empower Jordan’s business environment for guaranteeing a prosperous healthcare sector.

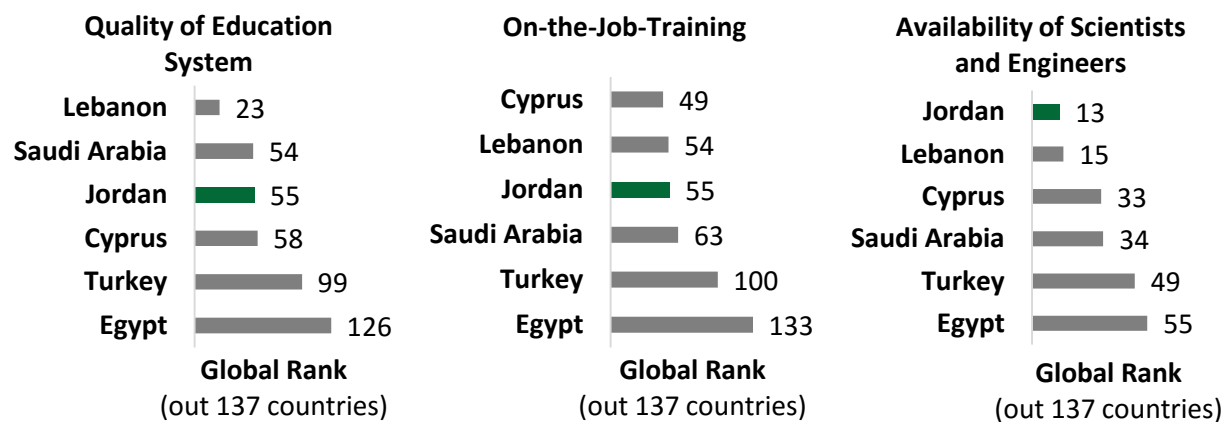
The sector is highly sophisticated compared to the rest of the MENA region. Rising health expenditures elsewhere together with Jordan’s position as the MENA’s premier and preferred destination for quality, world-class healthcare seekers are helping to drive the need for expanding and investing in the Kingdom’s healthcare sector.

The competitiveness of Jordan’s healthcare sector specifically revolves around the highly skilled workforce as the sector benefits from the availability of over 57,000 well-trained medical staff (considered to be of high-density, relative to population), in combination with comparatively low treatment fees (which are lower than those in Europe and the US). Jordanian professionals in the healthcare sector are also highly sought after based on for their solid education, training, qualification, and creativity. Jordan has the largest pool of physicians, dentists, and nurses per capita compared to the region.

Occupation	Workforce presence in Jordan	Ratio per 10,000
Physicians	26,019	27.3
Dentists	6,806	7.1
Nurses	12,872	13.5
Pharmacologists	12,076	12.7
Total	57,773	60.3

Source: Ministry of Health, 2017

Compared to its regional peers, Jordan’s labor market ranks high in terms of quality of higher education and on-the-job-training. It ranks first for the availability of scientists and engineers and among the top countries in the world in terms of numbers of engineers, physicians, and nurses per capita.



Source: World Economic Forum, Global Competitiveness Report, 2017

Jordan offers a regionally competitive environment for innovation, research, and development, which further supports the country's strong proposition for its healthcare sector.

	University & industry research collaboration		State of cluster development		Scientific & technical articles	
	Score (0 to 100)	Global rank (out of 128)	Score (0 to 100)	Global rank (out of 128)	Articles (per billion PPP\$ GDP)	Global rank (out of 128)
Cyprus	39.2	73	46.7	55	41.0	15
Egypt	23.8	121	54.5	31	9.7	67
Jordan	47.3	37	54.7	30	16.0	46
Lebanon	43.9	48	47.2	53	15.7	48
Saudi Arabia	41.9	54	60.6	22	8.0	74
Tunisia	32.8	98	36.3	97	31.8	24
Turkey	41.2	60	47.0	54	17.5	43

Source: World Intellectual Property Organization, Global Innovation Index, 2017

Healthcare facilities in Jordan are highly advanced. One of the largest private hospitals in the Kingdom (Jordan Hospital) was the first general specialty hospital to receive the Joint Commission on Accreditation of Healthcare Organizations' (JCAHO's) international accreditation in 2007, while another nine hospitals and cancer centers are currently accredited by the Joint Commission

International (JCI).⁴ Moreover, the King Hussein Cancer Center is the only specialized cancer treatment center in the MENA and ranks among the top cancer treatment facilities worldwide.

The Jordan University of Science and Technology has its own health center, which not only provides healthcare according to international standards, but also operates as a training, teaching, and research center; holding the Health Care Accreditation Council (HCAC) since 2011. Nationwide, more than 30,000 students are currently undertaking courses in para-medical sciences, medicine, pharmacy, and physical education, underpinning a well-educated and experienced workforce in healthcare.

Jordan is also considered a regional leader in medical tourism and as a regional medical treatment hub as 110 hospitals serve both its domestic population and over 250,000 foreign patients per year.⁵ In fact, Jordan is ranked first in the MENA region as a best healthcare service provider and a top destination for medical tourism, according to the World Bank.⁶

Finally, the King Hussein Business Park (in Amman) and the Irbid Development Area, two of Jordan's Development Zones, focus on attracting healthcare opportunities and services, offering high quality infrastructure and a streamlined business operating environment, boosted by attractive incentive packages for businesses operating within these zones.

Testimonials

JIC Support Services

JIC provides a host of services geared towards providing investors with a trustworthy sustainable and rewarding environment for their investments.

These services include:

- Providing comprehensive information about investment in the kingdom.
- Providing provisional feasibility studies for potential projects.
- Providing registration, licensing and other services through an accessible Investment Window.
- Regulating incentives and privileges in accordance with the Investment Law.
- Providing after-care services.

⁴ Medical Tourism Index, 2017.

⁵ Medical Tourism Index, 2017.

⁶ Medical Tourism Index, 2017.

- Supporting exports and promoting them to new markets in a bid to gain bigger shares of global markets.

Investment Window – Fast Track

The Investment Window at JIC, or the so called “Fast Track”, empowers local and foreign investors by working to simplify the registration, licensing and procedures of investment projects in various economic activities.

The Investment Window includes commissioners from all government agencies authorized to grant the necessary approvals and licenses and have the authority to deal with the investment projects.

Investment Window “Fast Track” services include:

- Providing information and technical advice to investors.
- Registering activities covered by the Investment Window services and granting the necessary licenses to operate its various activities.
- Granting of sectoral and environmental approvals.
- Facilitating regulatory approvals (construction licenses, work permits, vocational licenses).
- Issuance of the investor card, recruitment and use of foreign labor, visas and residence approvals and certain private approvals.

License guide for investment projects

The Investment Window provides a license guide. This comprehensive guide includes procedures for investment projects, starting from registration to obtaining organizational and sectorial approvals and licenses. Additionally, the License Guide offers Information on how to qualify for investment incentives as stipulated in the investment law.

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