

HEALTHCARE SYSTEM SURVEY	
1	General information concerning the demographic and economic structure of the country
	<p>*Population of the country, official languages of the country, age-gender dispersion in the country, the share of older persons in the total population</p> <p>The Republic of Lebanon is a democratic, parliamentary state of 10452 sq. km. located in the Near East on the Mediterranean Sea. The official language is Arabic and population is estimated at approximately 4.2 million inhabitants (410 individuals per 1 sq. km). Majority (85%) lives in urban regions with gender dispersion Male 48% and Female %52. There is a strong transition at the demographic level, with 24.6% of the population below the age of 15 and 9.7% older than 65, indicating that almost half of the population is active with a dependency rate of 52%. Population growth rate is 1.5 and life expectancy is 74 years, ranging between 71 years for men and 77 years for women (source: WHO).</p>
	<p>*Main economic activities and sectors, general import and export figures and their ratio to Turkey</p> <p>The economy of Lebanon is generally classified as a developing economy. The nominal GDP was estimated \$54.1 billions in 2018 [1], with a per capita GDP amounting to \$12,000. Government spending amounted to \$15.9 billion in 2018[11], or 23% of GDP.</p> <p>The Lebanese economy significantly expanded after the war of 2006, with growth averaging 9.1% between 2007 and 2010[12]. After 2011 the local economy was affected by the Syrian civil war, growing by a yearly average of 1.7% on the 2011-2016 period and by 1.5% in 2017[12]. In 2018, the size of the GDP was estimated to be \$54.1 billion [1]. Lebanon is the third-highest indebted country in the world in terms of the ratio of debt-to-GDP. As a consequence, interest payments consumed 48% of domestic government revenues in 2016, thus limiting the government's ability to make needed investments in infrastructure and other public goods.[13]</p> <p>The Lebanese economy is service-oriented. Lebanon has a strong tradition of laissez-faire, with the country's constitution stating that 'the economic system is free and ensures private initiative and the right to private property'. The major economic sectors include metal products, banking, agriculture, chemicals, and transport equipment. Main growth sectors include banking and tourism. There are no restrictions on foreign exchange or capital movement. For more details in foreign trade figures see http://www.customs.gov.lb/Trade_Statistics/Yearly/Yearly_Statistics.aspx</p>
2	Main healthcare system and financial models for healthcare expenditures
	<p>The Lebanese health system is mainly oriented toward curative care (treatment). It has witnessed a rapid growth in the number of private hospitals and high-tech medical centers.</p> <p>The Lebanese government has made significant efforts to strengthen the capacities of its institutions and promote the public health sector role in providing health services. However, the private sector still accounts for over 90% of hospital beds and the bulk of healthcare infrastructure with a 17% of hospitalization rate that depends on medical insurance coverage.</p> <p>Also, most emergency services are either provided by the private sector or by private clinics, and most of the primary health care services are provided by health centers run by NGO's. (CDR Progress Report 2015 http://www.cdr.gov.lb/eng/progress_reports/pr102015/Epub.pdf).</p> <p>Encl 1 - Health Strategic Plan for the medium term (2016 to 2020) Ministry of Public Health (MOPH), Lebanon Beirut, December 2016</p>
	<p>*What is the role of government in healthcare provision and funding? (Federal state, Territory and Local governments role and Primary-Secondary and Tertiary healthcare)</p> <p>The Ministry of Health is the Government ministry with the most important responsibilities with regards to the provision of health care in Lebanon. However, the Ministry's major role is in financing and not in the direct provision of services, and most of its budget is spent on financing the hospitalization of patients in private hospitals. The Ministry of Health has not been prepared for this role in its legislation. The existing legislation, promulgated in 1961, still defines the role of the Ministry, as a 'public health' entity (i.e. the provider of non-personal health services) to communities and the country in addition to its regulatory responsibilities (licensure, inspection and control). Moreover, from its original role to provide care for the poor, the Ministry has evolved to be the safety net, to cover, in principle, the medical care of all the non-insured, and to promote access and equity.</p>
	<p>* What is the ratio of total healthcare expenditures to GDP?</p> <p>Health expenditure, public (% of GDP) is 3.05 % for the year 2014 (http://data.worldbank.org/indicator/SH.XPD.PUBL.ZS?locations=LB)</p>
	<p>* Who is covered and how is insurance financed in healthcare delivery? (Publicly financed health insurance, private health insurance, etc)</p> <p>1- Public employees and teachers are covered by the Cooperative of Government Employees. Workers and Employees at the private sector are covered by the Social Security Funds. The Cooperative is financed from the Treasury and a premium collection of 6% on wages of public employees. The Social Security Fund is financed through premiums collection from companies with a rate of 23.5% on paid salaries (2% paid by the employee). 2- Private health insurances are self financed through sold plans with different classes and in-out coverages.</p>
	<p>* Is there any public social insurance organization covering healthcare expenditures? If yes, please explain its structure and operations.</p> <p>Public Sector: Public Employees and teachers are covered by the Cooperative of Government Employees with 90 % coverage on hospitalization and 85% coverage on medical tests and medications). Lebanese Armed Forces (Army) are receiving free of charges health care at Military Hospitals, as for the Police, Internal Security and other Security Forces are receiving healthcare at private hospitals that are agreed with at a coverage of 100% provided that admission permission for each single case is approved by both sides . The same coverage and conditions are applicable for medication and tests done at private laboratories.</p>
	<p>*Is there a private healthcare insurance system in the country? If yes, what are the major private insurance companies? What are the main operational principles of the system? Do the policies cover the healthcare expenditures abroad?</p> <p>Under The Insurance Law promulgated by Decree No. 9812 of 4 May 1968 (last amendment - Law No. 94 of 18 June 1999) providing for the Organization of Insurance Companies operating in Lebanon the private healthcare insurance system exists. This system/sector is monitored and regulated by The Insurance Control Commission (ICC - http://www.isc.gov.lb/) whom is a regulatory body in the Ministry of Economy and Trade mandated to the monitoring and regulating of the insurance sector to protect the interest of policy holders, subscribers and beneficiaries against eventual unfair market practices, and to promote the maintenance of an efficient fair, safe and stable Insurance market that would enhance public confidence in this sector. the staff is in charge observing, testing, and enforcing solvency requirements for insurance companies licensed to operate in Lebanon and is vested with certain powers of intervention towards these companies. According to the Insurance Control Commission Annual Report 2015 (http://www.isc.gov.lb/) in term of Gross Earned Premium Bankers is the 1st with a market share of 9.3%, Medgulf the 2nd 8.9%, AXA ME 3rd 7.6%, Libano Suisse the 4th 6.0% and Fidelity is the 5th with 5.9% market share. Among the offered medical care policies, there are products that cover the healthcare expenditure abroad. The list and profiles of private insurance companies operating in Lebanon are available on the web site of the Association of Insurance Companies in Lebanon http://www.acal.org.lb</p>
	<p>* Do public funds cover treatment abroad? If yes, please provide information concerning the relevant bureaucratic steps.</p> <p>Mainly no public funds cover treatment abroad. However there are few cases that are covered by public funds only when no treatment is available in the country.</p>
	<p>*What is the coverage ratio of healthcare expenditures financed by public funds, private insurance companies and out-of-pocket expenditures? (Please specify the ratio for each source of supply)</p> <p>Studies have shown that the overall spending of the Treasury through the Ministry of Public Health's budget and its share of insurance spending, as well as the budget of other insurance funds, including state employees and military hospitalization, do not exceed 20% of total spending on health.</p> <p>The budget of the MOPH does not exceed 3% of the government's budget. MOPH spends 68% of its budget on hospitalizations and medications which constitute half of the bill, but the major source of health funding remains family budgets, constituting 44% of overall health spending. This poses a heavy burden on low income families. Expenditure on health services and goods constitutes an average 14% of family budgets. However, this percentage varies between 20% for the poorest families and 8% for high-income families.</p>
3	Main healthcare indicators and informations about health tourism

* What is the number of hospital beds per patient? (private and public sector separately if available)
34.3 Beds / Per 10 000 population (MOPH 2014)
* What is the number of doctors and other healthcare staff per patient? (private and public sector separately if available)
30.67 Physicians, 29.59 Nurses, 3.43 Midwifery and 12.92 Dentists / Per 10 000 population (MOPH 2014)
Are there any foreign national health staff working in the country? From which country foreign medical personnel mainly come from? What is the legal procedure to employ foreign national physicians in the country?
Under the provisions of the Law Regulating the Practice of Medicine (No: 204 / dated March 2, 1993) Foreign national health staff are allowed to act in Lebanon . However, foreign national health staff occupy a very small employment share, majority are Syrians and mainly work as nurses and technicians. Foreign physicians should get licensed from: Colloquium, Ministry of Health, and the Lebanese Order of Physicians. Aside of the required certificates and documents, a foreign Physician should pay a none refundable fees of 500 Millions LP (approx: 335.000 US Dollars) for registration and required membership at the Order of Physicians in Lebanon.
* What are the most commonly seen diseases in the country?
The Lebanese Ministry of Health in Lebanon has conducted an assessment study for the most common health problems seen in Primary Health Care (PHC) facilities. The assessment aimed at identifying areas of strength and gaps in the current system. Data were drawn from 23 PHC centers in various regions of Lebanon, in addition to an 8-year review of the experience of the Department of Family Medicine at the American University Hospital. In general, 46% of all visits to PHC centers did not include any kind of diagnosis. Most centers provided data on large categories of diseases without breakdown into specific entities. The most commonly identified health problems were hypertension, diabetes and asthma, in addition to eye and ear diseases, cardiologic conditions, and dermatologic problems. Other health problems included ill-defined signs and symptoms associated most likely with mental distress. Dental caries, skin and hair parasites, and respiratory tract infections topped the health problems among children. The ongoing conflict in Syria continues to force masses of Syrians into neighboring countries. Lebanon counts the greatest number of displaced Syrians in the Middle East: according to UNHCR, there are currently more than 1.2 million registered Syrian refugees in Lebanon, 76% of whom are women and children. Unofficial numbers suggest a count in excess of 2 million, constituting around 45% of the Lebanese population. Many Syrian refugees are arriving in Lebanon having had no or limited access to health care for months and children have missed vital routine vaccinations. These vulnerable populations are at high risk of contracting communicable diseases, particularly when living in crowded conditions with limited access to safe water and sanitation facilities. Lebanon is taking all steps necessary in order to maintain its polio-free status (since 2002). Measles and Hepatitis A remain a major public health concern, particularly since the country witnessed a significant measles outbreak and at least a five-fold increase in hepatitis A incidence in 2013.
* What is the average time limit for access to treatment of the most common diseases?
Usually the treatment is immediate, there is no waiting list.
* What are the main diseases of which medical treatment is inadequate?
All available treatments in Lebanon are adequate. However, a report of the assessment of the mental health system in Lebanon using the World Health Organization - Assessment Instrument for Mental Health Systems (WHO-AIMS) found that mental health services are inadequate and are not given the attention they require. Lebanon is a small country which has suffered from various wars and political conflicts throughout its history. Consequently a considerable number of Lebanese people have been exposed to war-related traumatic events at some point in their lives. Many display symptoms of mental disorders - mainly anxiety and mood disorder as per the latest local study. Unfortunately, the number of individuals with mental disorders not receiving a treatment is considerably high - 9 out of 10. Moreover, more than 90% of MH services are provided by the private sector & therefore paid out-of-pocket by service users. The budget for Mental Health constitutes 5% of the general health budget, mainly devoted to cover long stay inpatient cost in private mental hospitals whereas outpatient community based services are the responsibility of the private sector with no budget except for those providing certain psychotropic medicines for free. However, expenditures on mental health are still far below the needs.
* What are the main procurement methods for medical devices (import, donation, aid, etc.)?
Import of medical devices is subject to free market rules, and monitored by the Ministry of Public Health. Donations and aids are accepted and exempted from duties through the High Relief Committee, a public institution affiliated to the Prime Minister's Office.
*For which reasons and for which treatments do patients go abroad? (Waiting lists, insufficiency of health staff, inadequacy of healthcare providers, high cost, relaxation purposes etc.) Which counties do they prefer frequently?
All kind of medical treatment and healthcare are available in Lebanon. However, some patients with high financial capabilities go abroad to receive treatment at international medical centers for heart diseases, cancer, organ transplants, neurosurgery, etc. Patients with less financial capabilities go abroad to receive treatments or surgeries that are not covered by public insurance and have high cost in Lebanon like Esthetic treatments and surgeries.
* What are the main dominant international accreditation certifications in healthcare sector in the country?
In order to strengthen the growth of the health sector in general and the governmental sector in particular along with enforcing the role of governmental hospitals to be able to compete with other health care institutions, improving the quality of health care services provided by Primary Health Care (PHC) centers across Lebanon has become a priority to the Lebanese Ministry of Public Health (MoPH). For this reason, MoPH in collaboration with Accreditation Canada implemented the Accreditation program on PHC centers chosen from across Lebanon. This program started during 2008 with Phase 1 of implementation reaching Phase 5 of implementation planned for 2016.
* Are there any legal and actual obstacles when the government sends (its citizen) patients to abroad (other country/healthcare institution) ?
No there are no legal and actual obstacles implemented when government sends patients to receive healthcare abroad.
4 Main Information about healthcare education and bilateral cooperations
*Are there any faculties of medicine and/or institutions providing healthcare education in the country? If yes, how many public and private university do have medical faculties? Please provide information concerning the geographical distribution and quality of these institutions as well as the general content of the education provided.
The medical field became known in Lebanon around the middle of the 19th century. It was a characteristic of big cities and included a few qualified doctors or surgeons mostly missionaries, or members of the Ottoman Army, the governing power at that time. Missionaries played an essential role in the introduction of medical education in the country, mainly through two universities, one English-speaking and the other French-speaking.
According to the official list of universities and institutes of the Ministry of Education and Higher Education, Lebanon counts 19 universities and 2 institutes awarding diplomas in the health sector. The terminologies used in the diploma names for the same specialization differ from one university to another; the situation is similar regarding affiliation to faculties.
There is one public university, namely Lebanese University (UL) with Faculties of Medicine Dentistry, Pharmacy, Agriculture and of Public Health. As for the private universities, there are 5 universities that have Faculties of Medicine; namely: American University of Beirut (AUB), Saint Joseph University (USJ), Holy Spirit University of Kaslik (USEK), University of Balamand and Beirut Arab University. The rest are universities awarding diplomas in dentistry, pharmacy, health sciences, nursing and agriculture.
*Are there any health agreement, protocol or Memorandum of Understanding (MoU) with Turkish government ?

	Agreement on Cooperation in the Field of Health (11 January 2010).
5	Main operational principles of the pharmaceutical sector
	<p>* What is the general legal framework concerning the pharmaceutical sector ? (Production, import, export, investment, medication)</p> <p>According to the Law No. 530 issued on 16.07.2003, Drugs registration follows a chain of links that are all submitted to the control of a Drug Registration Technical Committee (TC) at the MOPH. All pharmaceutical products must be registered at the MOPH whether being manufactured locally or imported. Any importation or distribution of drugs that is not submitted to the control of the MOPH is considered illegal and therefore is subject to confiscation. Manual for Administrative Procedures for Drugs & Pharmaceutical Products Registration is available on the Ministry's web site: www.moph.gov.lb</p> <p>Guidance and List of Requirements for Registration of Biosimilars Products: Lebanon chose to follow the "Guidelines on Evaluation of Similar Biotherapeutic Products (SBPS)" issued by the WHO, as adopted by the 60th meeting of the WHO Expert Committee on Biological Standardization, 19-23 October 2009 to evaluate the submitted SBS Files. Guidance for Registration of Similar Biological Medicinal products (Biosimilars) and the List of Requirements for the registration of Biosimilar products according to CTD format are available on www.moph.gov.lb</p>
	<p>* Is there any pharma manufacturing industry in the country (local-international) ?</p> <p>There are 11 pharmaceuticals manufacturing industries in Lebanon, some of them are owned by Lebanese and foreign entities and some others have signed agreements with notable multinational pharmaceutical companies for toll manufacturing, in license and out license.</p>
	<p>* Is there any medication that can not be provided within the medical treatment?</p> <p>Almost all kind of medications and molecules are available in Lebanon.</p>
	<p>* What is the total size of the pharmaceutical market and its composition in terms of therapeutic groups?</p> <p>According to Business Monitor International (BMI) in its most recent Pharmaceuticals and Healthcare report for Lebanon, estimated pharmaceutical sales in Lebanon reached \$1.63B in 2015 and are expected to grow to \$1.75B in 2016. Healthcare spending was estimated at \$3.59B in 2015 and is also expected to rise to \$3.91B in 2016.</p> <p>The largely urbanized Lebanese population spends a lot on pharmaceuticals. BMI projects pharmaceutical per capita spending to increase further from \$279 in 2015 to \$374 in 2016. Lebanon is likely to continue to disburse a large portion of its GDP (3.22% by 2020) on pharmaceuticals over the medium term. This portion is the largest in the MENA Region.</p>
	<p>* What are the top 5 pharmaceutical companies, distributors & molecules?</p> <p>The top five pharmaceutical companies are: Pharmaline (www.pharmaline.com.lb), Mediphar (www.medipharlabs.com), Benta (www.bpi.com.lb), Algorithm (www.algorithm-lb.com) and Arwan (www.arwanlb.com).</p> <p>Top five distributors are: Mersaco (http://www.mersaco.com/), Droguerie Fattal (http://www.fattal.com.lb), Omnipharma (http://www.omnipharma.com), Droguerie R, Pharaon & Fils (http://www.pharaon.com.lb). Abela Freres (http://abela-freres.com.lb)</p> <p>As far as molecules; Blood pressure, cholesterol, diabetes, oncology, neurology, urology and psychiatry medications.</p>
	<p>* Is there any tendering, if yes, what are the percentages of tender & free market as market shares (%)?</p> <p>N.A.</p>
	<p>* How many pharmaceutical companies are there in the market?</p> <p>There are 11 pharmaceutical manufacturers and more than 100 importers and distributors operating in the Lebanese market.</p>
	<p>* What are the generic and originator product market shares?</p> <p>The campaign promoting the use of generic drugs is fairly recent in Lebanon, therefore patented drug sales are still dominant on the Lebanese market. In 2015, sales of patented drugs reached \$800M and as such accounted for 61.8% of prescription drug sales and 49% of the total market. BMI believes that the generic drugs are perceived as inferior to patented drugs which leads to the estimate that patented drugs will still represent 51% of total medicine sales in 2020 and 52.2% by 2025.</p> <p>Lebanon's Generic Drug Market For the time being, generic drugs are marginalized on the market. In 2015, spending on generic drugs totaled \$494M or only 30.3% of the total market and 38.2% of total prescription drug sales. In 2016, the generic drugs sector is expected to grow to \$539M and will register a compounded annual growth rate (CAGR) of 8.2% over the forecast period to reach \$734M in 2020. According to the Health Ministry and BMI, 21% of generic medicines are available and manufactured in Lebanon. In spite of this, consumer demand for generic drugs remains low for the time being. However, that is likely to change when awareness campaigns take full effect and when consumers realize that they could be saving significant amounts of money.</p>

Additional Information

	What are the main foreign and local investments in healthcare sector? (Please indicate in each areas of hospital, pharma manufacturing, medical and medical devices)
	<p>There are 2 hospitals; The American University Hospital of Beirut and Hotel Dieu Du France were established by Missionaries from the USA and France. Few other private hospitals and medical clinics are affiliated to international medical centers. For instance, Beirut Clemenceau Medical Center CMC and Johns Hopkins Medicine International. In pharmaceuticals industry, among the 11 manufacturers there is only one company Arwan Pharmaceutical Industries Lebanon S.A.L. that has investors/business partners from United Arab Emirates.</p>
	<p>* Healthcare providers: The institutions that provides medical treatments with an experienced, specialized health staff such as hospitals,clinics.</p>
	<p>List of such institutions is available on: www.moph.gov.lb under heading "Health Facility Locator" and on the web site of the Syndicate of Private Hospitals in Lebanon http://www.syndicateofhospitals.org.lb</p>