

2024-2025 Emerging Markets Healthcare Outlook

A time to unlock the potential of collaboration
to tackle health challenges.

S P E Y S I D E

CORPORATE AFFAIRS & PUBLIC POLICY



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Over the past few years, health systems have focused on responding to the challenges presented by the COVID-19 pandemic and its aftermath. Although the pandemic seems far away now, its effects on healthcare systems still echo for all healthcare players aiming to be better prepared and mitigate potential risks, while solving challenging situations on chronic conditions and budget restraints. Paradoxically, many of the answers to the problems that healthcare systems face come from beyond their confines and decision makers are increasingly aware of the need to build solutions from a multisectoral perspective. This report explores the multifaceted dimensions of this evolution, especially from an emerging countries' perspective, highlighting the imperative for a more inclusive, multidisciplinary approach to tackle the complexities of healthcare challenges while bringing some insight from our regional trends on industry-wide trends.

Although policymakers have discussed the 'One Health' approach for many years, emerging markets are exploring new ways of multidisciplinary and multi-sectoral collaboration across human and animal health and agri-food systems. This has enhanced the participation of nontraditional stakeholders in health policy creation processes and has proven that the traditional siloed approach is no longer sufficient. It is becoming

increasingly common that solving a healthcare problem requires the use of technological tools, for example, the management of clinical information. What used to be a challenge for physicians providing healthcare services now involves the collaboration of computer technology companies and cloud service providers. Thus, health policy decisions have become more complex since they involve different sectors, but collaboration can contribute to building solutions that enhance healthcare system resilience in the long term.

Healthcare policy discussions are often confined within specific sectors or ministries, limiting the scope of consideration, and hindering effective policy solutions. For example, healthcare systems in emerging markets have tried to enhance their health and social care workforce, but shortages are still a significant threat that can only be addressed by coordinating with national education, labour, and economy authorities. It would also be convenient to think of international cooperation mechanisms to close the gap between human resources needed and available. According to the Organisation for Economic Cooperation and Development (OECD) in some countries, especially emerging markets, high inflation has eroded health sector wages, making it harder to attract and retain health professionals.¹ This is just an example of how a

more holistic and multidisciplinary approach is essential to fully grasp the interconnectedness of healthcare with other sectors, such as industry, technology, economy, education, and environmental sustainability.

From our perspective as a leading global emerging markets consultancy, we have witnessed how many engagement strategies often lack adequate multidisciplinary representation necessary to help decision makers adopt informed policy interventions. We strongly encourage industry actors to seek collaboration with a health-in-all policy approach and engage with policymakers and influencers focused from the technology, finance, environmental, urban planning, agricultural and food sectors, among others. Additionally, we identify that there are great opportunities to strengthen with patient advocacy organizations with innovative projects, but we also consider that reaching out to civil society organizations with a broader human rights scope could create stronger initiatives for developing comprehensive and sustainable healthcare policies.

A broader vision that encompasses multiple sectors and perspectives is essential to improve policy development, engagement, and outcomes. By adopting a multidisciplinary, multi-stakeholder, and multi-criteria approach, policymakers can craft more effective and inclusive healthcare policies that address the needs of diverse populations and align with broader societal goals. The trends of AI and data integration, environmental sustainability, and healthcare affordability exemplify the need for comprehensive and inclusive policies to ensure the well-being of diverse populations and the need for multi-actor engagement to ensure the industry's voice as these trends contribute to shaping the policy landscape. A clear example of this is the revolutionary impact that AI has had on the diversification diagnostic and treatment options which at the same time has brought challenges for the regulation of data privacy, data storage and copyright protection for software developers, to mention some.

It is also important to consider that, as some health challenges transcend borders, it is now more important than ever that national healthcare systems establish collaboration mechanisms that not only allow best practice sharing, but also sharing data and resources.ⁱⁱ For example, the European Union is debating a new law that will make it easier to exchange and access health

data at the regional level.ⁱⁱⁱ It is important to leverage the use of technology to promote this type of collaboration.

We usually think in terms of communicable diseases driving cross-border health collaboration, but there are now many similar challenges among healthcare systems. For instance, access to diagnosis and treatment for rare diseases has been only recently prioritized in most countries. In emerging markets with gaps in health coverage making rare diseases visible for decision makers is a significant challenge since they can easily argue that low prevalence diseases that require high-cost interventions are not viable. However, we believe that a lot can be done by sharing resources—such as healthcare personnel via telemedicine or laboratory testing capabilities—, information, and best practices across different nations.^{iv} For example, bilateral or multilateral cooperation could shorten the patient's odyssey to access diagnosis and treatment and improve health outcomes by optimizing scarce human and material resources.

By adopting a multidisciplinary, multi-stakeholder, and multi-criteria approach, policymakers can craft more effective and inclusive healthcare policies that address the needs of diverse populations and align with broader societal goals.



**Ian
Herbison**
CEO

Regional view - a glimpse on Asia, EMEA and LATAM

As the Asia Pacific (APAC) region emerges as a key global healthcare market, global healthcare companies face a dynamic and challenging landscape. Amidst rising costs, technological advancements, and evolving regulatory frameworks, staying ahead of the curve is crucial for success. Speyside offers a comprehensive suite of services to help our clients navigate this intricate market, ensuring they are well-positioned to capitalize on opportunities and navigate the complexities

The pandemic has accelerated the adoption of digital healthcare solutions across APAC, driven by the need to improve access, efficiency, and patient engagement. Governments and healthcare providers are increasingly embracing electronic health records (EHRs) to facilitate seamless data sharing and improve patient care coordination. Policymakers are increasingly introducing regulatory sandboxes by to foster innovation and trial new digital health solutions in a controlled environment. Our clients have benefited from our expertise in supporting the adoption of digital health technologies, navigating regulatory frameworks, and building patient engagement strategies.

The increasing cost of healthcare, fuelled by factors such as aging populations, rising healthcare spending, and supply chain disruptions, is putting

pressure on governments to implement cost-control measures. Generic drug substitution initiatives, price negotiations with pharmaceutical companies, and reforms in insurance schemes are gaining traction. In markets like Vietnam and Indonesia, local governments have highlighted a preference for locally manufactured generics. Meanwhile, in China and Japan, regulatory changes have varied with a focus on incentivizing innovation in Japan and balancing cost containment with ensuring access to essential medicines in China.

Despite the challenges, the APAC region remains an attractive market for pharmaceutical companies. The growing middle class, increasing prevalence of chronic diseases, and rising disposable incomes are driving demand for high-quality healthcare products and services. As you navigate the evolving healthcare landscape in APAC, Speyside's service offerings can provide invaluable support.



Malminderjit Singh
Regional Director APAC

The EMEA region is experiencing a shift in healthcare policy trends, with a continued push for localization and production capacity and a rise in competitor partnerships with local stakeholders. These trends are having a significant impact on the way global healthcare companies operate in the region

In 2023, the UAE and Saudi Arabia both established public drug manufacturing corporations, a move that signals a continued push towards self-reliance and increased control over pharmaceutical production in the region. This move is in line with broader efforts by regional governments to improve healthcare outcomes and reduce reliance on imports.

The region is also starting to have a stronger global leadership on health issues. As the region hosted the first COP conference to feature a "health day", regional countries will seek to build on this leadership. For

example, Egypt is currently chairing the discussion on local production and tech transfer occurring at the intergovernmental bureau negotiating a Pandemic Agreement showing their interest in these topics.

Global healthcare companies respond to these trends by entering non-commercial partnerships and agreements with local stakeholders. These partnerships aim to leverage local expertise and informal networks to shape healthcare policies. Such initiatives usually involve disease awareness programs, continuous medical education, diagnostic pilot initiatives, among others.

This trend is linked to an increasing emphasis by governments in the region on developing a skilled healthcare workforce. Governments recognize the importance of a skilled healthcare workforce to meet the growing demand for healthcare services and are

open to collaboration with global pharma companies. As the push for capital-intensive local production initiatives rises, these types of collaborations could be implemented by a larger group of companies.

Meanwhile, in Europe, the healthcare sector is bracing for the effects of ongoing discussions on significant reforms to the pharmaceutical policy landscape, involving a wide array of important issues for the industry including digital health, procurement, and incentives for innovation. The ongoing overhaul of pharmaceutical regulations represents a pivotal moment in shaping the course of healthcare innovation in the EU as MPs seek to achieve a balance between innovation, research, and patient access.

As global healthcare companies look to navigate the evolving healthcare policy landscape in the EMEA region, Speyside can provide valuable insights and support. We have a deep understanding of the region's regulatory environment and can help clients develop strategic partnerships with local stakeholders.



Fiona McCollum
Regional Director EMEA

The Latin American healthcare landscape has undergone significant transformations in 2023, driven by the aftermath of the COVID-19 pandemic, civil unrest, the evolving role of governments, and changing macroeconomic conditions. These trends have significant implications for global healthcare companies operating in the region.

Governments across Latin America have been actively reconfiguring their healthcare systems to incorporate lessons learned from the pandemic. A key trend has been the growing influence of radical and political thinking on policy decisions, leading to divergent approaches in different countries.

In Mexico and Colombia, we have seen a push for centralizing health spending at the federal or national level, respectively, and reducing the role of the private sector. This reflects a desire for greater control over healthcare resources and a focus on universal coverage. In contrast, the Argentine government is likely to make efforts to dismantle the universal public healthcare system, while Brazil is expected to maintain its more moderate trajectory of universal healthcare coverage. In Argentina, the newly elected government's proposed dollarization of the economy could bring about significant reductions in public spending and welfare programs, potentially affecting healthcare services and access to medicines.

Governments are also striving to improve the organization of high-complexity healthcare services, particularly for expensive interventions like cancer

treatment. This is evident in the pending presidential sanction for Brazil's National Cancer Prevention and Control Policy and the ongoing discussions in Mexico regarding a General Cancer Law. These initiatives aim to guarantee patients' rights and organize cancer care at the national level, often through legislative action.

As a leading global emerging markets corporate affairs and public policy consultancy, Speyside has been at the forefront of assisting healthcare companies navigate the ever-evolving Latin American healthcare landscape in 2023. As we look ahead to 2024, we remain committed to providing our clients with the strategic guidance and support they need to thrive in the dynamic Latin American healthcare landscape and continue to be a trusted partner for global healthcare companies as they navigate the challenges and seize the opportunities of this dynamic region.



Silvia Ardila
Regional Director
Latin America

Speyside Healthcare Outlook 2024-2025 shares the most relevant regional and industry-wide trends to watch out across the globe.

THE CHALLENGE OF HEALTHCARE AFFORDABILITY AND INCREASING PUSH FOR PRICING CONTROLS, IP FLEXIBILITY AND TECH TRANSFER:



Escalating healthcare costs pose challenges in all healthcare systems, but emerging markets face these challenges, while striving to achieve universal coverage. Rising costs prompt governments to explore and implement measures to enhance healthcare affordability for their populations but also to prevent disease so health risks are not materialized. This is the reason why, for example, health authorities in emerging markets constantly call for the implementation of a preventive approach and the strengthening of primary care but struggle to implement effective measures. This is the case for Bangladesh, Cameroon, Colombia, Ethiopia, Georgia, Ghana, Indonesia, Kenya, Lebanon, Mexico, Mongolia, Nigeria, Pakistan, Peru, Rwanda, South Africa, Sri Lanka, Thailand, Uganda, and the United Republic of Tanzania, among others.^v

Also, the traditional siloed approach to healthcare policy is no longer adequate to address this complex

issue. Instead, a holistic and multidisciplinary approach that encompasses the interconnectedness of healthcare with other sectors is essential. National governments are increasingly questioning the value of innovative therapies but are also failing to alleviate the pressure that regulatory authorities create with the backlog of pending processes. There is a need to raise awareness among National Regulatory Authorities on their role in the accessibility of healthcare. The COVID-19 pandemic has catalysed movements towards improving regulatory harmonization and reliance mechanisms,^{vi} and we are likely to see progress on these fronts in 2024. This is key for regulatory authorities in emerging markets to create pathways to help their populations have easier access to innovative therapies.

To curb healthcare costs, pricing controls on pharmaceuticals and medical technologies are gaining traction in emerging markets. Governments

are implementing measures to regulate drug prices and negotiate better deals with pharmaceutical companies. Increasingly, Finance and Planning Ministries are involved in these processes and payers are prioritizing prevention and budget control. There are varying levels of success in the implementation of these measures, but during 2024 we are expecting increasing pressure from payers and even from the World Health Organization (WHO) that recently announced the creation of technical advisory group that will advise it on pricing policies for medicines, particularly the prices of medicines on the essential medicine list (EML).^{vii}

In the realm of intellectual property (IP), emerging markets are considering or implementing flexibilities to expand access to affordable generic medications and medical technologies. This includes measures such as compulsory licensing and parallel importation. Colombia has a recent example of compulsory license issued for an antiretroviral drug^{viii} and there are calls in Brazil for it to follow.^{ix} This trend may even have impact in the United States^x and the European Union.^{xi} If compulsory license discussions advance in high income countries, the innovative global pharmaceutical industry shall prepare for an active dialogue with patent offices and regulatory and health authorities during 2024.

We are also anticipating further advancements in the “nearshoring” tendency activated after the COVID-19 pandemic. Technology transfer initiatives are being pursued to strengthen local production capabilities and reduce reliance on costly imported healthcare products.^{xii} Policymakers are focusing on these initiatives to foster self-sufficiency and empower emerging markets to address their healthcare needs independently. Countries like Brazil, Colombia, Mexico, and South Africa are leading conversations on tech transfer in the global health arena. On the ground, discussions are being activated on compulsory tech transfer and on the safety risks that establishing operations on emerging markets imply.^{xiii}



THE IMPORTANCE OF AI AND DATA FOR THE CURRENT AND FUTURE POLICY LANDSCAPE:

The transformative power of AI and data is revolutionizing healthcare in emerging markets. These technologies are being harnessed to enhance the efficiency and effectiveness of healthcare systems, enabling the development of personalized treatments, and fostering improved disease surveillance. As governments in emerging markets increasingly recognize the potential of AI and data to strengthen their healthcare systems, they are taking proactive steps to promote their adoption. This includes developing supportive policies and regulations, investing in AI and data infrastructure, and fostering collaboration among stakeholders.

There are some successful initiatives being implemented in emerging markets, but the following years will be crucial to transit from the implementation of successful pilots to the construction of sustainable projects. Some international organizations offer advisory services such as the World Bank Group's International Finance Corporation (IFC) that partners with governments to foster best practices in healthcare and life sciences by promoting the deployment of innovative technologies.^{xiv} The IFC also participates in several public-private partnerships in healthcare. Considering this could help unlock the potential of technology in different emerging markets.

However, the integration of AI and data into healthcare presents ethical and regulatory challenges that require careful consideration. Data privacy, bias in algorithms, and transparency in decision-making processes are among the critical issues that warrant attention to ensure responsible and equitable implementation. Across the globe, governments are discussing the limits to impose on the use of AI to contain its risks while still incentivizing its many benefits. For example, the U.S. authorities are debating a proposed rule to



require electronic health record systems using AI and algorithms to provide information to users about how those technologies work.^{xv} The WHO is starting to outline considerations for regulation of artificial intelligence for health.^{xvi} As this debate progresses, stakeholders in emerging markets shall closely follow it to look for opportunities at the local level.

Healthcare companies are increasingly interacting with data regulators and Technology/Communications Ministries. Furthermore, there are more interactions with local startups, partners, and innovation ecosystems in the healthcare industry than ever before. This means that leaders within healthcare companies must develop new capabilities and knowledge in AI and Data and that engagement plans must plan for a wider array of stakeholders.

Implementing the use of innovative technologies in emerging markets will also generate data to better understand and approach their health needs. For example, genomic medicine has been developed based on data from population with European ancestry, limiting the development of precision medicine for other ethnic groups.^{xvii} Some Asian countries are taking steps towards generating data to better address the needs of their populations.^{xviii} In the Americas, there is an initiative called the Pan-American Highway for Digital Health.^{xix} The project –backed by the Inter-American Development Bank (IDB), along with the Pan American Health Organization (PAHO)– would allow individuals, wherever they are, to access their international medical history (International Patient Summary) with relevant health data. This would enable physicians to provide quality care by knowing the patient's medical history regardless of their origin.



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INCREASED LINK TO ENVIRONMENTAL/ SUSTAINABILITY COMPLIANCE AND CLIMATE CHANGE REDUCTION:



The growing concerns surrounding environmental and sustainability issues are prompting governments in emerging markets to act. Governments are enacting regulations to curb pollution, conserve natural resources, and promote sustainable development. This shift in policy aligns with the escalating recognition of the inextricable link between climate change and human health. The healthcare industry, with its significant environmental footprint, is subject to increasing scrutiny and regulations aimed at reducing its impact on the planet. Pharmaceutical companies, especially consumer healthcare companies, shall also consider that consumers are increasingly interested in environmental issues. During 2024 and beyond it will be important for healthcare companies to think of how to communicate their commitment towards a more sustainable future.

Greenhouse gas emissions, as a major contributor to climate change, demand attention from the healthcare sector. Healthcare organizations are undertaking initiatives to reduce their environmental footprint, adopting sustainable practices, and investing in renewable energy sources. Governments are implementing measures to minimize the environmental impact of pharmaceutical manufacturing and waste disposal. But the most impactful actions stem from joint efforts. For example, in China and India, key markets for pharmaceuticals manufacturing and estimated to account for up to 50% of materials for medicines, global pharmaceutical companies have come together to pursue agreements with energy providers and approach net zero health systems.^{xx}

Environmental issues are being considered as critical for decisions of international public/ private partnerships at the global scale. For example, Gavi's 2024 Vaccine Investment Strategy (VIS) will consider climate change risk as key criteria for the assessment process that determines which vaccines will join the Gavi portfolio in coming years.^{xxi} This will benefit companies that have substantially invested in sustainability initiatives and will increase pressure on those that have not accelerated their pace towards better environmental efficiency. It is also worth considering that governments in emerging markets are increasing the implementation of "green taxes". So, this also creates incentives to invest in improving sustainability practices.

Finally, while planning the agenda for 2024 it is also important to consider that the 28th United Nations Climate Change Conference (COP 28), that took place in Dubai by the end of 2023, unveiled the 'COP28 UAE Declaration on Climate and Health'. This Declaration is aimed at placing health at the heart of climate action and accelerating the development of climate-resilient, sustainable and equitable health systems.^{xxii} The COP28 conference established a set of finance commitments on climate and health including a USD 300 million commitment by the Global Fund to prepare health systems, USD 100 million by the Rockefeller Foundation to scale up climate and health solutions, and an announcement by the UK Government of up to GBP 54 million. These funding commitments represent opportunities for collaboration with governments in emerging markets that will pursue further actions to improve the intersection between climate and health with a One Health approach.

We are happy to help our clients seize the opportunities that the next two years will bring. Our team is ready to help you connect the dots between global, regional and local level agenda, challenges and opportunities. The availability of expert consultants on the ground makes Speyside an ideal partner to design and implement strategies that prepare the landscape for sustainable business results and healthcare outcomes. Our expertise includes landscape assessment, strategic plan and stakeholder engagement to build long-term results.

Please [visit our website for more information](#).

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