Review of progress 2013-14

Business plan 2014-15
Review of first 18 months
Who we are

Department of Health

NHS England

UKTI

Healthcare UK Established January 2013

Knowledge Expertise Resources
The NHS is named the best healthcare system

<table>
<thead>
<tr>
<th>Category</th>
<th>UK</th>
<th>CHE</th>
<th>SWE</th>
<th>AUS</th>
<th>GER</th>
<th>NED</th>
<th>NOR</th>
<th>NZ</th>
<th>FRA</th>
<th>CAN</th>
<th>US</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall ranking (2013)</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>5</td>
<td>7</td>
<td>7</td>
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<tr>
<td>Quality Care</td>
<td>1</td>
<td>3</td>
<td>10</td>
<td>2</td>
<td>7</td>
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<td>11</td>
<td>4</td>
<td>8</td>
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<tr>
<td>Effective Care</td>
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<td>8</td>
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<td>Coordinated Care</td>
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<td>Patient-Centered Care</td>
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<td>5</td>
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<td>3</td>
<td>11</td>
<td>6</td>
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<td>8</td>
<td>4</td>
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<td>Access</td>
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<td>2</td>
<td>4</td>
<td>8</td>
<td>2</td>
<td>4</td>
<td>6</td>
<td>7</td>
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<td>Cost-Related Problem</td>
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<td>8</td>
<td>3</td>
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<td>5</td>
<td>11</td>
</tr>
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<td>Timeliness of Care</td>
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<td>1</td>
<td>9</td>
<td>6</td>
<td>4</td>
<td>2</td>
<td>8</td>
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<td>10</td>
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<tr>
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<tr>
<td>Equity</td>
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<td>10</td>
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<td>11</td>
</tr>
<tr>
<td>Healthy Lives</td>
<td>10</td>
<td>3</td>
<td>2</td>
<td>4</td>
<td>7</td>
<td>5</td>
<td>6</td>
<td>9</td>
<td>1</td>
<td>8</td>
<td>11</td>
</tr>
<tr>
<td>Health Expenditures/Capita, 2011**</td>
<td>$3,405</td>
<td>$5,643</td>
<td>$3,925</td>
<td>$3,800</td>
<td>$4,495</td>
<td>$5,099</td>
<td>$5,669</td>
<td>$3,182</td>
<td>$4,118</td>
<td>$4,522</td>
<td>$8,508</td>
</tr>
</tbody>
</table>

** Expenditures shown in $US PPP (purchasing power parity); Australian $ data are from 2010.
We secured £200m more than target

£556m

of business successes in 2013/14
Objective 1:
Engage the UK healthcare sector in exporting

Target 300
Objective 1:
Engage the UK healthcare sector in exporting

Target: 300

How did we do?
612

Service deliveries

455 Business
81 Public
76 NHS

over double!
Objective 2:
Raise the profile of the UK healthcare sector internationally

62 missions, high level meetings or events

6 missions led by ministers or business ambassadors

Launch events in Brazil, China, India and the Gulf

87% positive

- Very much more positive than before
- More positive than before
- No change – my opinion remains positive
- No change – my opinion remains neutral
- No opinion
Inspiring major overseas institutions to work with the UK
“Healthcare UK now has a strong identity which is recognised by its customers both in the UK and overseas and has helped it to achieve success in its first year of operations.”

Earl Howe
Parliamentary Under Secretary of State for Quality
Department of Health
“The Healthcare UK pavilion looked stunning at the recent convention in Hong Kong, and professional too! It portrayed the excellence of British healthcare extremely well in such a sophisticated environment as the Hospital Convention.

We have now established some very engaging dialogue with key stakeholders in the public hospital sector.”

Cecilia Chan
Assistant Trade Commissioner
British Consulate Hong Kong
Objective 3:
Identify the biggest international opportunities in healthcare

Target for 2013/14: £1.5bn
80 qualified leads

How did we do?
£10.8bn
82 qualified leads

Value of qualified leads in priority markets:
- Libya: £5.3bn
- Saudi Arabia: £1.9bn
- Kuwait: £307m
- UAE: £222m
- China: £125m
- Brazil: £133m
- Oman: £10m
- India: £3m
- Hong Kong: £203m

620% above target!
Objective 3:
Identify the biggest international opportunities in healthcare

<table>
<thead>
<tr>
<th>Proposition</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Infrastructure</td>
<td>£6.5bn</td>
</tr>
<tr>
<td>Health system development</td>
<td>£2.1bn</td>
</tr>
<tr>
<td>Education and training</td>
<td>£1.5bn</td>
</tr>
<tr>
<td>Primary Care*</td>
<td>£367m</td>
</tr>
<tr>
<td>Public Private Partnerships</td>
<td>£75m</td>
</tr>
<tr>
<td>Elderly Care*</td>
<td>£35m</td>
</tr>
<tr>
<td>Digital Health</td>
<td>£33m</td>
</tr>
<tr>
<td>Diabetes*</td>
<td>£5m</td>
</tr>
</tbody>
</table>

*propositions which have been subsumed into the clinical services proposition for 2014/15
Digital health in China – a significant opportunity for the UK

“The demonstrator centre is a groundbreaking initiative in China as part of long term collaboration between UKTI, Healthcare UK and Zhejiang. With the launch of the demonstrator centre, I am sure we will see abundant exciting opportunities arising for the two countries to explore collaboration on the healthcare front.”

Brian Gallagher
Counsellor and Campaign Strategy Director
Life Sciences in China
Objective 4:
Help the UK health sector access leads and convert them into business successes

Value of business wins (£m)

Target for 2013/14

£350m
Objective 4:
Help the UK health sector access leads and convert them into business successes

Target for 2013/14: £350m

How did we do in 2013/14? £556m

Value of business wins (£m)

- **£281m** Business
- **£218m** Public
- **£35m** NHS
- **£22m** Business and NHS/public
Objective 4:
Help the UK health sector access leads and convert them into business successes

Value of business wins (£m)

Target for 2013/14
£350m

How did we do in 2013/14?
£556m

Target for 2014/15
£500m

Target for 2015/16
£650m

£1.5bn trade or investment attributable to Healthcare UK over three years
UK organisations are successfully establishing partnerships overseas
“We’re now working on export deals in four different countries – without the help of Healthcare UK it’s very unlikely we’d have got this far in such a short space of time.”

Sue Sanders
Sales Director
TPP
Press release: 2nd December 2013

Sinophi Healthcare signs a letter of intent with Huaiyin District and the Huai’an First People’s hospital to build a 1,000 bed regional oncology hospital.

“The signing of this agreement is an exciting opportunity to bring together UK and Chinese expertise in cancer treatment to build a world-class cancer hospital in Huai’an City. The hospital will serve 20 million-plus patients in northern Jiangsu.

We are very grateful for the support the project has received from our partners, the Huai’an City Government, Jiangsu provincial authorities and from the UK Government, UKTI, and Healthcare UK.”

Simon McKinnon OBE
Co-Founder and Executive Chairman
Sinophi Healthcare
The vital partner in global health

For more information, visit gov.uk/healthcareuk or email healthcare.uk@ukti.gsi.gov.uk
Business Plan
2014/15
Stakeholders
The scale of the challenge

- **£1tr**: UK export target by 2020
- **£1.5bn**: Healthcare UK – triple healthcare business wins by 2020
- **£500m**: 2014/15 annual business wins target
- **£1.5bn**: 2020/21 annual business wins target
Our aim is supported by 4 objectives

1. Engage and develop UK healthcare organisations
2. Raise the profile of UK healthcare internationally
3. Identify leads and opportunities
4. Convert opportunities to business success
Objective 1:
Engage and develop the UK healthcare sector to maximise export potential

- Explore existing and potential products and services that can be marketed overseas
- Support the NHS family to prepare for overseas activities
- Support the NHS family to operate philanthropically overseas
- Assure good governance and delivery quality for overseas projects
Objective 2:
Raise the profile of the UK healthcare sector internationally

- Government-to-government initiatives
- Single gateway for international buyers
- Promote UK capabilities and partnerships
- Campaigns in priority markets
Objective 3:
Identify the biggest international opportunities in healthcare

Horizon scanning
priority markets and beyond

Develop relationships
local influencers, regulators and healthcare service providers

Prioritise opportunities
where the UK has a competitive advantage
Objective 4:
Help the UK healthcare sector access leads and convert them into business success

- Publicise specific opportunities
- Catalyse consortia formation
- Offer political, cultural and commercial insights
- Find local partners for market access
- Assistance with negotiation and tender processes

2014/15 annual business wins target
£500m

2020/21 annual business wins target
£1.5bn
Sector propositions
Priority markets

Map of priority markets including Turkey, Kuwait, Libya, Brazil, Saudi Arabia, Oman, UAE, India, China, and Hong Kong.
Accessing new markets
Accessing new markets
Have we got the markets right?

**UK capability**
- Size of the opportunity accessible to the UK?
- UK capabilities matched to market requirements?
- UK companies keen to engage?

**Market conditions**
- Significant investment programme?
- Favourable inter-government relationship?
- Validated high value opportunity (HVO) in market?
- UKTI active in market?
<table>
<thead>
<tr>
<th>August</th>
<th>September</th>
<th>October</th>
<th>November</th>
<th>December</th>
<th>January</th>
<th>February</th>
<th>March</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>India</td>
<td>Mexico</td>
<td>Singapore</td>
<td>UAE</td>
<td>Arab Health, UAE</td>
<td>India</td>
<td>NHS Innovation Expo</td>
</tr>
<tr>
<td>Colombia</td>
<td>Peru</td>
<td></td>
<td>Foundation Trust Network Annual Conference</td>
<td>Saudi Arabia</td>
<td>Brazil</td>
<td>Brazil</td>
<td>China</td>
</tr>
<tr>
<td>Turkey</td>
<td>MENA</td>
<td></td>
<td>Hong Kong</td>
<td></td>
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</tr>
<tr>
<td>Oman</td>
<td>China</td>
<td></td>
<td>Kuwait</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>India</td>
<td>Indonesia</td>
<td>Turkey</td>
<td>Brazil</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**UK-based event**
**Overseas mission**
We want your feedback

1. Have we identified the right things to sell?
   - Infrastructure
   - Healthcare systems
   - Education and training
   - Clinical services
   - Digital health

2. Have we identified the right countries to sell them?
   - Brazil
   - China
   - Hong Kong
   - India
   - Kuwait
   - Saudi Arabia
   - UAE
   - Oman
   - Libya
   - Turkey

3. Are we doing the right things to support organisations do business internationally?
The vital partner in global health

For more information, visit [gov.uk/healthcareuk](http://gov.uk/healthcareuk) or email healthcare.uk@uksi.gsi.gov.uk
Digital health in China

The opportunity and the challenge
An overview of the Chinese market

The dual burdens of developing countries have fallen hard on the population giant China: the fastest rate of population aging in the world accompanied by a dramatic yet inequitable rise of standards of living has led one-fifth of the world’s total population towards a diversifying portfolio of chronic diseases. The needs of this population, marked with the rise of a young urban middle class, are currently unmet by the Chinese public hospital system through the lack of access to care as well as dissatisfaction with the services provided. Consequently, this underserved market translates to opportunities for foreign and domestic investors, as urban Chinese grow increasingly affluent.

Emerging trends in Chinese healthcare
PWC market report 2012
Key characteristics of healthcare in China

- Heavily urban and hospital oriented care provision along with a general attitude of mistrust by people towards non-hospital settings
- An increasing dependency ratio with the ageing population on the rise and an increasing incidence of chronic disease
- Key elements of an ongoing healthcare reform within the country are universal insurance coverage and the introduction of structured primary care.
- There is a general lack of satisfaction amongst patients with the quality of healthcare services provided

<table>
<thead>
<tr>
<th>Causes</th>
<th>Rank by no. of deaths</th>
<th>%age Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stroke</td>
<td>2</td>
<td>21%</td>
</tr>
<tr>
<td>Ischematic heart disease</td>
<td>3</td>
<td>81%</td>
</tr>
<tr>
<td>COPID</td>
<td>1</td>
<td>-45%</td>
</tr>
<tr>
<td>Lung Cancer</td>
<td>6</td>
<td>81%</td>
</tr>
<tr>
<td>Liver Cancer</td>
<td>7</td>
<td>37%</td>
</tr>
<tr>
<td>Stomach Cancer</td>
<td>5</td>
<td>-11%</td>
</tr>
<tr>
<td>Road Injury</td>
<td>12</td>
<td>-</td>
</tr>
<tr>
<td>Lower respiratory infections</td>
<td>4</td>
<td>-</td>
</tr>
<tr>
<td>Oesophageal cancer</td>
<td>11</td>
<td>-1%</td>
</tr>
<tr>
<td>Hypertensive heart disease</td>
<td>14</td>
<td>21%</td>
</tr>
<tr>
<td>Diabetes</td>
<td>22</td>
<td>67%</td>
</tr>
</tbody>
</table>

Source: GBD 2010, March 2013, Institute of Health Metrics & Evaluation
## Contents

- Introduction
- Overview of the Chinese market
- Key characteristics of healthcare in China
- The UK’s potential digital health propositions for China
- The opportunity identification/qualification process
The strategic plan for digital healthcare in China

- The "Health China 2012" strategic plan to 2020, aims to provide access to basic medical and health services for every urban and rural resident.
- The 12th five-year plan to 2017 for IT-enabled healthcare services determined the roadmap for to support the strategic goal by defining the "35212 Project”.
  - 3 levels - national, provincial & city
  - 5 health systems - public health, medical systems, insurance, drug access & management systems
  - 2 health records - hospitals and community health centres
  - 1 network
  - 2 systems - information security & information standard system
Target of healthcare informatization in the 12th five-year plan

- **Services to residents**: optimise the public health, medical services, medical care, and drug supervision work processes. Fulfill the requirements of resident registration, continuous prevention, care, treatment, rehabilitation and other services, and participate in the management of personal health needs.

- **Services to medical staff**: make medical and health institutions to share high-quality medical and health resource. Normalise healthcare services behaviour. Improve efficiency, reduce duplication of inspection, reduce medical errors, improve grassroots especially in remote areas of medical and health services.

- **Services to management**: establish and improve disease reporting, medical services, health emergency, health surveillance, health statistics and other information systems. Realise real-time information and data submittal for the accurate knowledge of the progress of work, analyse problems, to provide evidence-based management and decision-making, to achieve the health real-time monitoring, dynamic management, scientific decision-making, improve the comprehensive management.
The UK’s digital health propositions for China

<table>
<thead>
<tr>
<th>Central systems &amp; services</th>
<th>Local systems &amp; services</th>
<th>Personal care solutions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Unique patient Identifier (UPI)</td>
<td>1. Electronic health record (EHR) interconnectivity</td>
<td>1. Self-care and automated triage</td>
</tr>
<tr>
<td>2. Centralised demographics service</td>
<td>2. Primary care systems</td>
<td>2. Telehealth</td>
</tr>
<tr>
<td>3. Centralised electronic health records</td>
<td>3. Clinical decision support systems</td>
<td>3. mHealth</td>
</tr>
<tr>
<td>4. Patient referral system</td>
<td>4. Telemedicine</td>
<td></td>
</tr>
<tr>
<td>5. Service quality management system</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Population health analytics solutions</td>
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</table>
# Central systems & services propositions

<table>
<thead>
<tr>
<th>Index</th>
<th>Proposition</th>
<th>Type</th>
<th>Description</th>
<th>The need in China</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Unique patient Identifier (UPI)</td>
<td>D&amp;I consultancy</td>
<td>The UPI is the basis for identifying patient records across healthcare IT systems</td>
<td>China does not have a national UPI although there are provincial / city level citizen identifiers for instance the local citizen id number in Nanjing.</td>
</tr>
<tr>
<td>2</td>
<td>Centralised demographics service</td>
<td>D&amp;I consultancy</td>
<td>The service would enable systems across the country to access the right patient record</td>
<td>Patients will need to be identified accurately across a number of EHRs.</td>
</tr>
<tr>
<td>Index</td>
<td>Proposition</td>
<td>Type</td>
<td>Description</td>
<td>The need in China</td>
</tr>
<tr>
<td>-------</td>
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<td>-------------</td>
<td>-------------------</td>
</tr>
<tr>
<td>1</td>
<td>Electronic health record (EHR) interconnectivity</td>
<td>Solution, service &amp; implementation consultancy</td>
<td>While the creation of centralised care records is one way of addressing the need for a single view of the patients health record interconnectivity of systems is an alternative solution</td>
<td>The digital health landscape in China is characterised by a variety of EHRs with little interconnectivity.</td>
</tr>
<tr>
<td>2</td>
<td>Primary care systems</td>
<td>Solution, service &amp; implementation consultancy</td>
<td>Electronic health records, clinical standards, operational processes, reporting tools and interoperability with other healthcare IT systems</td>
<td>With the current healthcare reforms being implemented in China, the need for high-quality, interoperable, primary care systems</td>
</tr>
</tbody>
</table>
## Personal care propositions

<table>
<thead>
<tr>
<th>Index</th>
<th>Proposition</th>
<th>Type</th>
<th>Description</th>
<th>The need in China</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Self-care and automated triage</td>
<td>Solution, service &amp; implementation consultancy</td>
<td>The willingness on people’s part to take ownership of their own health and their familiarity with computers and smartphones is also increasing the take up of a range of self care solutions over a combination of digital channels</td>
<td>The increasing burden on the Chinese health system by growth in chronic disease, an aged population, growing insurance coverage and high Internet and mobile internet penetration combine to make a self-care solution attractive to a regional government</td>
</tr>
</tbody>
</table>
Key digital health developments

Pilots in Nanjing and Ningbo

Ningxia project:
- platform design and scoping exercise underway
- likely to include:
  - electronic health record database and decision support system
  - public health and chronic disease management
  - other services

Neuroimaging informatics for earlier diagnosis of dementia in collaboration with Beijing Union Medical and Pharmaceutical General Corporation.

UK Digital healthcare demonstration centre, Zhejiang
The Zhejiang digital health demonstration centre - concept

• The Zhejiang demonstration centre is a ground-breaking initiative in China as part of a collaboration between the UK government (UKTI/Healthcare UK), the Provincial government of Zhejiang and the Municipal Government of Ningbo City.

• The Ningbo Health Bureau has provided 140 square metres of space in the city of Ningbo for the UK’s digital health companies to showcase their solutions to a large number of buying institutions. The demonstrator also represents a great opportunity for UK companies to “road-test” their solutions en route to making them China-ready.

• The space has been allocated in the Ningbo No.2 Hospital – one of the longest established and best known hospitals, located right in the middle of the city.

• A series of themed events will be run at regular intervals to draw visitors to the demonstrator while providing an opportunity for UK companies to highlight their insights through seminars and discussion forums. These events will also enable participating UK companies to plan their availability on site and follow up on leads and opportunities.
UK Digital Health Demonstration Centre, Zhejiang

Update

• Launched on 9th of June 2014 by
  • Brian Gallagher, China Director of Life Science, Healthcare and Social Care
  • Mr Zou, Vice Director of Ningbo Health Bureau etc.
• The Centre was visited by Mr Zhen, the Vice Mayor of Zhejiang Province.
• The UK companies participating in the launch event were: BT, TPP, Cerno Health, Ixico, ServMetric, Nine Health CIC, Grey Matters, CareShield, Yecco and Keele University.
  • A number of other companies are interested and on a waiting list.
• About 150 Chinese provincial and municipal officials, hospital chiefs and senior company representatives visited the demonstrator on the launch date generating a large number of important business leads for participating UK companies.
• The next demonstrator event will be held on the 12th - 13th August
  • Coincides with the China Health Forum, 15th- 17th August in Beijing
Thank you
The vital partner in global health

For more information, visit gov.uk/healthcareuk or email healthcare.uk@ukti.gsi.gov.uk
Future priorities for Healthcare UK?

How do we approach growing opportunities in the health sector in the Pacific?
Priority markets

- Allow us to focus resources, political intervention and precious NHS visits
- But many other parts of the world are growing fast
- Seeking ways to assess new markets and even to look at regional strategies
- Clear that the Pacific Rim countries have many common themes:
  - growth in middle classes
  - healthcare is often the next priority after a car
  - requirement for jobs for the children of the middle class
  - partnerships rather than a supplier/deliver relationship a common theme
- Want to share some of our findings so far
Pacific Alliance

- Created in 2011
  - Colombia, Peru, Chile and Mexico are members
  - Costa Rica and Panama in the process of joining
- Chile and Mexico members of OECD, Colombia joining
- Combined GDP of US$3tn
- A third of Latin America’s population
- All members rank in top 25% of WB “Ease of Doing Business” ratings
- 95% of all internal barriers to trade removed
  - Remaining 5% to be gone by 2017.
- Integration of stock exchanges virtually complete
Peru – small but interesting?

- Peru currently ranks close to the bottom of regional tables.
- But has a long history of private money in public infrastructure.
- Public health is taking a much higher profile.
  - Government is expanding the funding of the SIS to provide universal healthcare.
- Things are moving fast (for this region).
  - Growth at greater than 5%.
- Government has chosen to adopt a competition based PPP system.
- ProInversion is running the competition.
  - A government arms-length body.
Peru – Future Plans

Existing facilities

Piura
Pop 350,000 – Refurbish, equip and manage a 300 bed hospital

Lambayeque
Pop 330,000 – Refurbish, equip and manage a 250 bed hospital

Chimbote
Pop 330,000 – Refurbish, equip and manage a 250 bed hospital

Arequipa
Pop 900,000 – Refurbish, equip and manage a 300 bed hospital

New build projects

Community Care Centres
8 – 14 enhanced general practice clinics. Half in Lima, half built regionally

New Hospitals
Up to 25 new hospitals to be built in the next 7 years. Several regionally plus two large hospitals to cater for the growth in Lima

Small Medical Centres
Up to 700 new small clinics built across the country. Likely built as a regional service PPP.
Peru – other projects

**A National Blood Bank**
Currently 200 centres for blood donation. PPP to create a national Blood and Tissue centre is expected.

**Umbilical Cord Bank**
MoH currently seeking a company to run a detailed study into establishing a facility.

**Training**
Jointly funded MoH/MoE scheme to send students abroad for 3-6 mth training courses in world leading hospitals.

**Education and Standards**
MoH note that medical schools set their own standards and these are not internationally recognised. Seeking consultancy on redefining the system.

**Records Management**
The introduction of comprehensive SIS cover requires better management of its members.

**E-Health**
Requirement for distance monitoring of chronic conditions to reduce hospital visits.

MoH “roadshow”
9/10/11 October

Funding
US$3bn
Colombia – a valuable growing market

- The Colombian economy grew by 4.3% last year
  - inflation is low
- Outwardly looking, aware of its defects and keen to overcome them
- President Santos continues in power for the next 4 years
- UK has a long, sustained relationship with Colombia
- Colombia already has some of South America’s best hospitals
- Large scale revisions of the existing healthcare law planned
- Setting up business in Colombia is easy
Colombia - Opportunities

• There is a significant under provision of hospitals and clinics

• New hospitals are on the horizon
  • US$1bn over next 5 years

• Both primary and highly specialist care are particularly deficient

• Cost control is an issue

• Health systems are in need of revision

• More of the population are choosing to top up their health insurance

• Travel in Colombia is very difficult
  • e-health opportunities

• Oil and gas sector provides free healthcare insurance
Chile and Mexico

Both markets still to be reviewed

Chile

• High growth, low unemployment country
  • Performance linked to copper reserves (of up to 50 years)
  • UK exports rose 66% to over £1bn in 2013
  • Chileans like to buy British
• Government has extensive plans for healthcare infrastructure
  • PPP seems “out”.
  • Other delivery mechanisms may be under consideration.

Mexico

• A huge market
• Areas being investigate include:
  • Reforms to primary care
  • hospital efficiency
# The Pacific Alliance vs Mercosul

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**Note:** Rankings for Doing Business are based on 1=high, 100=low, and for Corruption are based on 1=low, 10=high.
Pacific Alliance – time for a regional strategy?

- Different countries have different requirements
  - strong public requirements in Peru and Chile.
  - many private opportunities in Colombia and Mexico.
  - e-health a common theme (unsurprisingly)
- UK Embassies are strong in each of these countries
  - we may be able to support them regionally
- Strategy?
  - find a low risk opportunity in one country,
  - find partners and establish a legal entity
  - consolidate and then decide whether to seek opportunities in other PA countries
  - increasingly there will be incentives to transfer technology and knowledge
Indonesia

- Many similarities to the eastern rim of the Pacific
- Indonesia is the fourth most populous country in the world
- Government has approved policies which will introduce universal care by 2019
- Over the next two years healthcare expenditure will rise by 25%
- Indonesia has a rising and aging population.
  - GDP is increasing at about 7% pa
  - disposable income is increasing at 10% pa
- A Frost and Sullivan report that has highlighted several areas where the UK is well placed to help the Indonesian market
Indonesia - Opportunities

• Frost and Sullivan identified:
  • complex hospital design, build, fit out and management
  • advanced medical and surgical equipment
  • IT systems including patient/hospital records systems and tele-health
  • pharmaceuticals
  • quality control technology and practices
  • clinical and non-clinical training for medical staff
• UKTI Indonesia is running GREAT Healthcare campaign
• Mission to the Indonesia Hospital Expo in Jakarta
  • 15-18 October 2014
Questions?
John Snowdon
The vital partner in global health

For more information, visit gov.uk/healthcareuk or email healthcare.uk@ukti.gsi.gov.uk