

Annual review 2015/16



Key achievements 2015/16

Service deliveries

970

service deliveries achieved.

367

service deliveries to the NHS and other public sector bodies.

Business leads

£9.2bn

worth of leads identified.

Raising the profile of the UK healthcare sector

48

events and high-level meetings.

Business wins

£3.7bn

value of contracts signed for 67 projects.

Priority markets 2015/16

In 2015/16, we focused our activities on 10 priority markets as well as extending into Latin America. We concentrate on 5 aspects of healthcare where there is growing international demand.

Priority markets

- + China
- + Saudi Arabia
- + UAE
- + Qatar
- + Oman
- + Kuwait
- + Turkey
- + Algeria
- + India
- + Brazil
(and Latin America, including Mexico, Chile, Peru and Columbia)

Healthcare sectors



Clinical services



Education and training



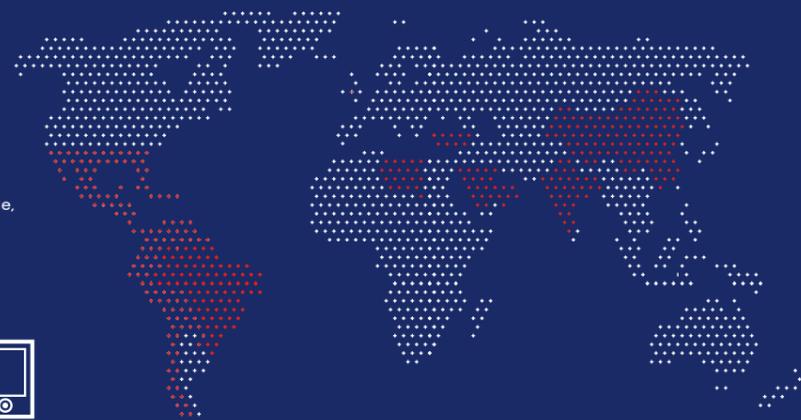
Digital health



Health systems development



Healthcare infrastructure services



Foreword

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I am delighted to report on Healthcare UK's achievements in its third year of operation. We have seen impressive results, far outstripping the already excellent performance of its first two years. Major contracts have come to fruition during the year, building on progress made in many countries over the three years of Healthcare UK's operation and contributing to the growth of our own economy.

Healthcare UK's programme of activities, delivered in partnership with our colleagues in Embassies and High Commissions, has assisted even more British organisations this year than last. Both private enterprises and public sector organisations, ranging from NHS Trusts, Department of Health arm's-length bodies and academic institutions, work closely with Healthcare UK. We have received unstinting support from government ministers, our business ambassadors and officials at home and abroad. Healthcare collaboration featured in the high-profile China and Mexico state visits as well as the visit of the Indian Prime Minister.

The outcome has been a record number of contracts signed by UK organisations, bringing the total value of business won in the last three years to over £5bn. UK organisations, both public and private, have been selected as the partner of choice for substantial projects in countries as diverse as China, Saudi Arabia, India and Brazil. Increasingly, the UK is a potential partner for a large or complex project which needs a range of organisations to come together to make a unified offer. We have responded to this by facilitating the founding of the UK International Healthcare Management Association (UKIHMA).

Building on the momentum of the last three years, we are now embarking on a new phase, working with the UK's entire healthcare sector to position us even more strongly as a strategic partner at the early stage of project development. We will be working with UKTI's extensive overseas network to identify an even wider range of opportunities which capitalise on the diverse expertise and capabilities of the UK's healthcare sector. Confidence is high that the UK's skills and expertise will continue to improve the quality of healthcare for our valued international partners for mutual benefit, and I am very eager to work with all of our stakeholders and collaborators to boost the success of the sector overseas in the years to come.

About Healthcare UK

We help UK healthcare providers to do more business overseas. We do this by promoting the UK healthcare sector to overseas markets and supporting healthcare partnerships between the UK and overseas healthcare providers.

We work with the NHS and public sector bodies to strengthen their capacity to operate and succeed internationally. Healthcare UK is a joint initiative of the Department of Health (DH), UK Trade & Investment (UKTI) and NHS England.

Deborah Kobewka

Deborah Kobewka,
Managing Director, Healthcare UK

Our purpose

Healthcare UK aims to increase the UK's share of the growing global healthcare market. As specialists in healthcare partnership working, we act as the bridge between international demand for healthcare services, systems and infrastructure and the rich pool of UK know-how and capability in these fields.

We achieve this by promoting the UK healthcare sector in overseas markets, building strong links with overseas governments, businesses, healthcare providers and academia. We connect these organisations with the unrivalled expertise of the NHS, the UK's thriving commercial healthcare industry and our world-renowned academic sector.

Healthcare UK works with NHS institutions and public sector bodies to help refine their international offer and find delivery partners. We link these organisations with individual overseas opportunities, provide insights into political, commercial and cultural issues and facilitate market access.

Healthcare UK supports partnerships between UK and overseas purchasers and providers in five key areas of healthcare provision:

- + Healthcare infrastructure services
- + Clinical services
- + Digital health
- + Education and training
- + Health systems development

International healthcare organisations work with us because we offer a trusted route for developing world-class health services.

As a joint initiative of the Department of Health, UKTI and NHS England, we use our influence to facilitate government-to-government engagement for large healthcare programmes.

We also have excellent local connections, with UKTI offices operating in over 100 markets around the world.

Healthcare UK currently has a pipeline of qualified leads and opportunities worth £9.2bn in its priority markets. With our support, UK organisations have contracted over £5bn of business overseas in the last three years.

Our objectives

Healthcare UK has four objectives:

01

To engage the UK healthcare sector in maximising export potential

We reach out to every part of the UK healthcare sector, raising awareness of the vast range of exporting opportunities and encouraging providers to work together to bid for major overseas projects. We also develop the capability of public sector healthcare organisations to respond to international demand for their expertise.

02

To raise the international profile of the UK healthcare sector

We promote the UK's capabilities overseas, running campaigns under the Healthcare UK banner. We raise awareness among international partners about the capabilities of the UK healthcare sector, and act as a single gateway to access these capabilities.

03

To identify the biggest healthcare opportunities

We use our in-depth market knowledge and relationships with local influencers, regulators and healthcare service buyers to identify the biggest commercial opportunities worldwide. We share this market intelligence with the UK sector and keep it apprised of the evolving needs of health services around the world.



04

To help the UK health sector access leads and convert them into business success

Healthcare UK connects overseas decision-makers and buyers to UK organisations that can meet their needs, helping them to build lasting and fruitful partnerships. We provide insights on political, cultural and commercial drivers in priority markets and help UK organisations navigate negotiation and tender processes successfully. We help UK organisations develop and deliver solutions, catalysing the creation of consortia where appropriate.

01

To engage the UK healthcare sector in exporting

Target 2015/16

600

service deliveries¹ in total.

100

service deliveries to NHS or public sector organisations.

Achievement 2015/16

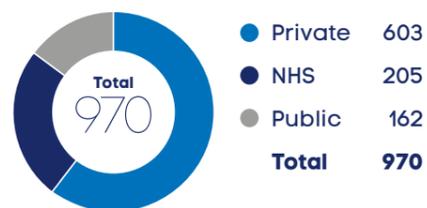
970

service deliveries¹ in total.

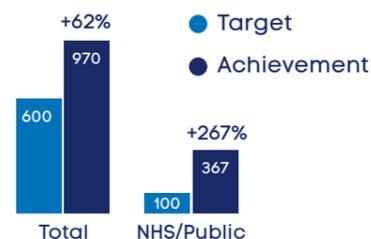
367

service deliveries to NHS or public sector organisations.

Number of service deliveries



Service deliveries: achievement against target



We have continued to develop strong relationships with UK healthcare organisations during 2015/16.

We exceeded our service delivery target by 62% overall, including reaching over three times as many NHS and other public sector organisations than planned. The total number of service deliveries achieved in 2015/16 are up by 25% compared with last year.

Continuing to achieve more service deliveries than our target for NHS and public sector organisations is testament to the success of Healthcare UK's [NHS International Development Team](#).

The team was set up to develop the capacity of public sector healthcare providers to operate commercially overseas. They provide the full range of Healthcare UK services, but have the expertise to tailor additional support for organisations that lack experience in the international arena.

Supporting NHS organisations to develop international revenues: intensive training programme

The NHS Development Team has rolled out an innovative programme to support NHS and public sector healthcare organisations interested in either starting to create international revenues or taking a more strategic approach to current activities. In association with Learning Impact, the team have supported 29 senior business development staff with limited experience of exporting healthcare services. Starting with an intensive workshop, participants follow a six-month development programme, reconvening with their fellow participants at the end of the programme to review progress and share experiences.

Enabling NHS and private sector partnerships: UK International Healthcare Management Association

Increasingly, the UK is seen to be a potential partner for a large or complex project which needs a range of organisations to come together to make a unified offer. We have responded to this by facilitating the founding UK International Healthcare Management Association (UKIHMA).

The mission of UKIHMA's 20 NHS Trusts and 30 commercial partners is to share, promote and grow the capability of UK providers to win contracts to manage healthcare services overseas, with members specialising in everything from design to delivery and ongoing improvement of healthcare facilities and services. Healthcare UK continues to identify attractive opportunities for the membership to consider.

02

To raise the profile of the UK healthcare sector internationally

2015/16

48

high-level events, missions and meetings.

Healthcare UK participated in or managed 48 high-level events, missions and meetings in 2015/16. These included ministerial visits, inward visits, outward missions, exhibitions and conferences. Most activities were targeted at our priority markets, but we also responded to requests for support in other markets on a case-by-case basis.

We have continued to nurture relationships at the highest level with overseas governments and healthcare providers to support our sector.

Highlights include healthcare-focused discussions as part of the visit of [China's Vice Premier and Minister of Health](#) in September, and the State Visit of the [President of China](#) in November. Building on these, a group of senior NHS leaders made a visit to China in January to learn first-hand about the Chinese health system and the opportunities for the NHS to work with it.

[Mexico's Vice Minister of Health and the Health Minister from New Delhi's regional government](#) both spoke at the NHS Health and Care Innovation Expo held in Manchester in September. At the event, over 100 UK healthcare providers participated in a series of Healthcare UK seminars on opportunities in Saudi Arabia, Turkey, South East Asia and China as well as Mexico and India.

Healthcare UK organised a week of international seminars during the [Milan Expo](#) in September, hosted by George Freeman MP, Parliamentary Under Secretary of State for Life Sciences. The Healthcare and Life Sciences GREAT Week in Milan focused on three areas of scientific and technological advancement that will transform care in the UK and have the potential to address the biggest global healthcare challenges of our age. These include:

- + the integration of digital technologies into healthcare
- + the emergence of personalised medicine, driven by advances in genomics
- + the importance of designing health and care facilities, and the surrounding buildings, in ways that foster better health patterns and a safer and more rapid healing environment.

All three areas stimulated considerable interest among the international delegates, with representatives from the UK's world-leading genomics industry in particular demand.

In March, Healthcare UK collaborated with Wilton Park (an executive agency of the Foreign and Commonwealth Office) and the Science and Innovation Network, to run a conference and study tour on [genomics and personalised medicine](#), building on the discussions held in Milan. At the event, The Rt Hon Alistair Burt MP, Minister of State for Community and Social Care at the Department of Health, joined 27 representatives of governments, healthcare providers, academia and industry from 13 countries who gathered in the UK to meet with over 40 British experts in genomics. Their aim was to explore collaborations to develop their local genomics capability.

03

To identify the biggest international opportunities in healthcare

Target 2015/16

£3bn

total value of qualified leads identified.

Achievement 2015/16

£9.2bn

total value of qualified leads identified.

Healthcare UK continued to focus its activity in 10 key markets in 2015/16. These were selected on the basis of the size and scale of the opportunities, and the openness and receptiveness to provision of healthcare by UK organisations. During the year, activities in Brazil were extended to include other countries in Latin America, including Mexico, Peru, Chile and Columbia.

Each of these markets is experiencing significant investment to improve the quality and coverage of healthcare in areas that the UK has strong capabilities. Our aim is to identify high-value opportunities with an accessible value of over £250 million for UK organisations (representing a cumulative total of contract values rather than a single contract).

Qualified leads by market

Priority country/region	Value of opportunities
China	£3,710m
Middle East & Turkey	£3,576m
India	£994m
Brazil & Latin America	£954m

Healthcare UK also works in other markets on a case-by-case basis. We resist spreading our resources too thinly, however. Business wins come from building strong relationships and in-depth market knowledge over time and prioritising markets is the only way to achieve this.

Our relationship with UKTI is invaluable. Connecting UK organisations with UKTI gives ready access to over 100 markets and advisers who can introduce providers to opportunities wherever they exist.

04

To help the UK health sector access leads and convert them into business success

Target 2015/16

£650m

worth of business wins.

Achievement 2015/16

£3.7bn

worth of business wins from 67 projects.

Target 2013-2016

£1.5bn

worth of business wins.

Achievement 2013-2016

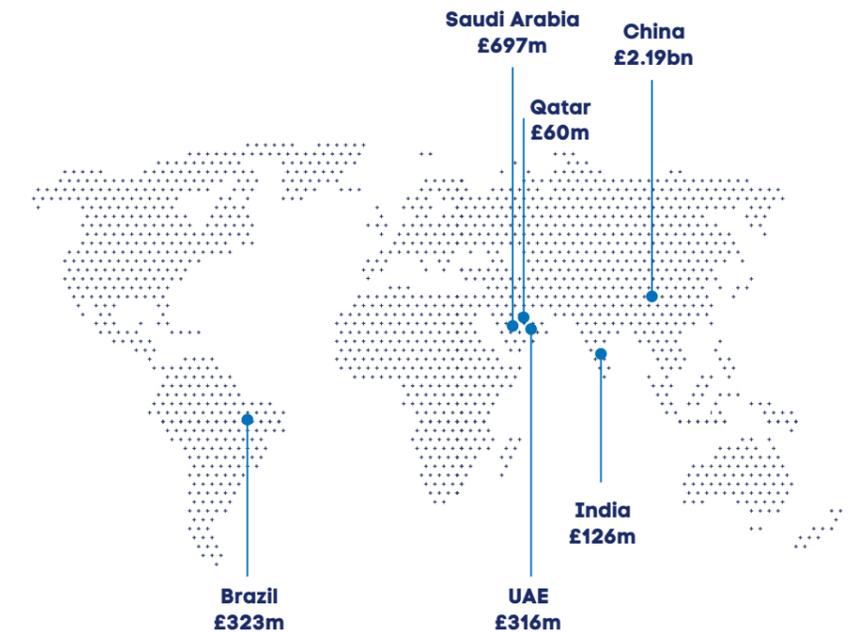
£5.03bn

worth of business wins.

Percentage of target achieved 2013-16

235%

Business wins measure the values of contracts signed, where Healthcare UK has helped a company or organisation to win the contract.



When Healthcare UK was established in 2013, the ambition was to support the UK healthcare sector to win at least £1.5bn worth of business over three years. During this time, each annual target has been exceeded and in this third year, the sector has had outstanding success, signing over £3.7bn worth of contracts in a single year. In the last three years, over £5bn worth of business has been won, more than 3.3 times the level envisaged when Healthcare UK was established.

The value of business wins increased significantly in all our priority markets this year compared with last. This reflects the groundwork done over the years to complete on significant deals. Contracts signed in China have quadrupled in value and major projects in Saudi Arabia came to fruition during the year. China was by far our most successful market with 18 wins registered, followed by Brazil (11), Saudi Arabia (9) the UAE (7) and India (4).

Business wins related to healthcare infrastructure services were the highest by value of the five key areas that Healthcare UK focuses on, followed by clinical services, digital health and then education and training.

Healthcare sector	Total business wins
Healthcare infrastructure services	£2,665m
Clinical services	£899m
Digital health	£142m
Education and training	£17m
Health systems development	£0.05m

China

Performance overview

£2.19bn

total value of 18 business wins.

£3.7bn

value of qualified opportunities.



The opportunities

China's 13th Five Year Plan (2016-2020) delivered a roadmap for the country to deliver its target of creating a "Healthy China". This provides a rich source of opportunities for UK healthcare organisations to develop productive collaborations with Chinese partners.

China is planning to:

- + Increase the number of qualified doctors and medical assistants to 2.5 per 1,000 people.
- + Increase the number of GP doctors to 2 per 10,000 people.
- + Systematically train 500,000 resident doctors to adequate standards.
- + Establish 1-2 public hospitals in each county.
- + Focus on providing universal basic health insurance for both of urban and rural citizens.
- + Reduce premature mortality from critical chronic diseases by 10%.
- + Reduce the infant mortality rate to 7.5%, the mortality rate for children under five years to 9.5% and the mortality rate for childbirth to 18 per 100,000.

Healthcare UK performance

China has continued to deliver strong business success for UK organisations. UK public sector interest in the market continues to grow, highlighted by a visit to China in January 2016 by senior NHS leaders. Key Memoranda of Understanding signed between UK organisations and the Chinese Health Ministry and regional partners have continued to set the framework for increased collaboration.

Highlights

[The Secretary of State hosted Vice Premier Liu at the 3rd People to People \(P2P\) Dialogue, September 2015.](#)

The Rt Hon Jeremy Hunt MP, Secretary of State for Health, welcomed Madam Liu Yandong and Health Secretary Madam Li Bin to the UK and held healthcare discussions during the P2P meeting. The discussions involved Dr Margaret Chan, Director-General, WHO and an imposing line-up of global health leaders. UK organisations were included in the discussions and Mr Hunt committed to support China in the development of a multi-tier health system. In support of this commitment, Healthcare UK will contribute to a pilot programme on delivering primary care in Zhejiang Province later in 2016.

[The State Visit of President Xi Jinping, October 2015](#)

George Freeman MP, Parliamentary Under Secretary of State for Life Sciences, addressed a distinguished audience on UK capability in the field of genomics at the business summit attended by the Prime Minister and the Chinese President. Mr Freeman witnessed a signing ceremony covering healthcare, life science and science and innovation collaborations. 17 individual contracts were signed with a value approaching £2bn.

[NHS Leaders Trade Mission to China, January 2016](#)

Fourteen senior leaders representing the NHS visited China in January to receive a briefing on the Chinese healthcare system and deepen their understanding of a range of healthcare projects identified by Healthcare UK. The projects were varied in scope. Some require clinical advice or training and others a turnkey approach to establishing new hospital facilities. An extensive programme, visiting four cities in five days, has been followed up to maintain dialogue and support relationships between the Chinese and British participants.

China

Case study:

10 hospital co-operation project IHG and Wanda Group

In January 2016, International Hospitals Group (IHG) and Wanda Group, one of China's largest conglomerates, signed a 10-year exclusive global hospital partnership. This was witnessed by the Rt Hon Philip Hammond MP, the UK's Secretary of State for Foreign and Commonwealth Affairs.

The relationship between IHG and Wanda began in 2014 with meetings between the companies in the UK that were actively supported by UKTI, Healthcare UK and the China British Business Council (CBBC).

Following complex negotiations, a co-operation was established and the first project will be to build and manage the new 200-bed IHG Qingdao International Hospital. This is now under construction and due to open in 2018. It will be followed by projects in Chengdu (500 beds) and Shanghai (600 beds).

Wanda will invest up to £1.5 billion in the first three projects, with IHG targeting revenue of at least £300 million.



I'm very pleased to witness this very significant agreement. It highlights the UK's leading position to meet growing demand for healthcare co-operation in China and as a partner of choice in a range of sectors. Our strong bilateral relationship positions us well for collaboration in a range of fields as we pursue our global strategic partnership.



The Rt Hon Philip Hammond MP,
Secretary of State for Foreign and Commonwealth Affairs



We are delighted to partner with IHG. They have an excellent track record in managing hospitals throughout the world. We look forward to harnessing UK expertise to bring healthcare opportunities to China and beyond. Wanda is bringing world-leading hospitals to China to benefit people with premium healthcare demands and fuel the ongoing development of the market in China.



Wang Jianlin, Chairman,
Wanda Group

Case study:

Developing China's healthcare capability through training Annie Barr International

The international arm of Annie Barr Associates, the healthcare training and development consultancy based in the North East of England, has experienced rapid growth in business with China. The company has signed several agreements this year to deliver an extensive portfolio of training projects. This expansion has led to Annie Barr appointing their first representative in China, based in Beijing, with plans to open an office in Hangzhou in the coming year. Healthcare UK and its partner CBBC has supported Annie Barr since 2014, to build relationships in China. This included participation in the mission accompanying the Chancellor last October, and the business summit organised as part of the state visit to the UK of China's president.

Projects signed this year include:

- + A series of courses for managers, clinicians and support staff for the high-end nursing home market, in partnership with Darwin of Beijing.
- + Courses for nurses in elderly care and home care in Zhenjiang.
- + An agreement with TBF Healthcare in Shanghai to provide strategic consultancy, design and implementation of several projects, including elderly care facilities and public health initiatives.
- + MoU with the China Hospital Association to provide a series of training courses for clinicians and CEOs of hospitals.



This year alone we have been in China every month progressing our various projects. We have recruited a number of staff from the UK to deliver our projects. We have also signed agreements with two NHS Trusts to help achieve our outcomes and we plan to involve other high-quality organisations, including from the NHS. We would not have been able to achieve this without the help of Healthcare UK and CBBC.



Annie Barr, CEO and Clinical Director,
Annie Barr Associates

The year in pictures

**China**

Wang Jianlin, Chairman, Wanda Group, and Chester King, Chairman IHG Asia prepare to sign their global hospital partnership agreement, witnessed by the Rt Hon Philip Hammond MP, Secretary of State for Foreign and Commonwealth Affairs (centre).

**Middle East and Turkey**

The Rt Hon. Alistair Burt MP, Minister of State for Community and Social Care at the Department of Health with Sally Heath, Trade and Investment Advisor- Healthcare for the UAE at Arab Health 2016.

**Latin America**

Dr Eduardo Gonzales Pier, Mexico's Vice Minister of Health and colleagues visiting Boundary House Medical Centre in Greater Manchester, hosted by Dr Paul Grey (far left).

**India**

University of Derby Online cements its partnership with Renaissance eServices to provide progression routes to psychology courses. (L to R) Stuart Kay and Shabd Mistra of Renaissance eServices with Natalie Court, Rosy Banwait and Dr Alice Doherty of the University of Derby.

Middle East and Turkey

Performance overview

£1.08bn

total value of 31 business wins.

£3.6bn

value of qualified opportunities.



Opportunities for UK organisations

- + The Middle East is characterised by rapidly growing populations and income levels, rising life expectancy and a high incidence of long-term conditions.
- + A number of ambitious medical infrastructure projects are driving healthcare expenditure.
- + Shortage of local physicians and qualified allied healthcare staff that poses an obstacle to the sector's growth.
- + Healthcare expenditure in Saudi Arabia was estimated at \$35.9bn in 2013, 4.8% of GDP.
- + The United Arab Emirates spent an estimated \$14bn on healthcare in 2013, 3.5% of GDP. Spending is expected to increase by 6.9% a year to reach \$19.6bn in 2018.
- + Healthcare spending in Turkey is set to rise by approximately 10.5% annually through Turkey's Health Transformation Program.
- + Saudi Arabia's healthcare budget in 2014 included funding for 11 new hospitals, 11 medical centres and two medical complexes, in addition to the 132 hospitals and healthcare centres already under construction.
- + The Saudi Arabian Ministry of Health has established the National Transformation Office, tasked with reviewing all aspects of healthcare in the Kingdom.
- + Turkey needs more than 95,000 new hospital beds by 2023, with investment of more than \$14bn required in the public sector to achieve this.
- + The Turkish government has launched an ambitious PPP programme called The Hospital Campus Project. It aims to build between 36 and 40 healthcare campuses, with a total bed capacity of 30,000 within the next 5–8 years.

Case study:

Extending ophthalmology services in Abu Dhabi

Moorfields Eye Hospital NHS Foundation Trust and United Eastern Medical Services LLC

Moorfields Eye Hospital Centre officially opened in April 2016 at Abu Dhabi Marina Village. It is the first Moorfields medical facility to open with a partner and the second in the UAE, following the opening of Moorfields Eye Hospital Dubai in 2007.

It is a partnership between Moorfields Eye Hospital NHS Foundation Trust and United Eastern Medical Services LLC, a leading privately owned healthcare development and investment company in Abu Dhabi.

The facility in Abu Dhabi provides a comprehensive range of specialist ophthalmological services, carried out on a day case basis. A team of highly experienced and qualified consultant ophthalmologists provides treatment and follow-up to patients, using advanced equipment and technology for the diagnosis and treatment of the most complex eye conditions. They are supported by medical staff and a customer services team.

Healthcare UK and the Embassy in the UAE supported Moorfields to reach its goal of successfully launching a standalone facility in Abu Dhabi, and in particular helping to secure vital meetings with key contacts in the Abu Dhabi markets.

Healthcare UK performance

We have continued to invest considerable effort in opening up the opportunities in the Middle East and Turkey for UK organisations. This is now paying dividends as our support enabled UK companies to win over £1bn worth of business in these markets in 2015/16.

Healthcare UK's involvement in business-to-business and government forums (notably Kuwait Joint Steering Group, UAE Healthcare Working Group and the Saudi Joint Ministerial Committee) ensures that we have high-level access to ministries and senior decision makers to facilitate business engagement.

Increased engagement with the Gulf States on healthcare is a strategic priority to support UK regional interests, and Gulf States' own national transformation plans. Healthcare UK has actively involved leading UK healthcare organisations in developing and implementing the government's strategic approach to:

- + Increase trade and investment activity
- + Explore strategic partnerships in genomics, including a joint action plan with Kuwait
- + Support development of Gulf capabilities, including emergency medicine, an example of this was a high-level programme delivered with the Ministry of Defence, which demonstrated frontline UK practice and shared our pioneering expertise with Gulf delegates.

During the year, mental health has become an increasing priority in the Gulf. We supported mental health conferences in the region, linked NHS institutions and British private companies to specific commercial opportunities, and organised an inward visit of the UAE Ministry of Health to discuss partnerships with UK organisations.

Highlights

Joint Ministerial Committee (JMC) - November 2015

His Excellency Eng. Khalid bin Abdulaziz Al-Falih, Minister of Health for Saudi Arabia hosted the Joint Ministerial Committee. He subsequently visited the UK for a series of meetings to understand the NHS's transformation journey with a view to modelling the Saudi Arabia system on the NHS.

Arab Health 2016, Dubai

Healthcare UK delivered a wide ranging programme of activities at Arab Health 2016, including highlighting genomics as an area for collaboration with the UK and the international launch of the UK International Hospital Management Association (UKIHMA). All of our activities enabled UK companies to gain a better understanding of the healthcare opportunities in the Gulf and develop contacts with future partners.

Genomics and personalised medicine study tour and conference, March 2016.

A delegation from the Gulf took part in the study tour and conference which showcased UK expertise in this burgeoning field and explored collaborations to develop their local genomics capability.

Middle East and Turkey

Case study:

Establishing a new medical facility in the UAE

King's College Hospital NHS Foundation Trust and the Ashmore Group

Healthcare UK has supported the public private partnership (PPP) between King's College Hospital NHS Foundation Trust (KCH), the Ashmore Group (a UK-based specialist emerging markets investment management company) and two Emirati organisations, Al Tayer Group and Dubai Investments. The aim was to establish a new 100-bed hospital and three clinics in Dubai, in addition to acquiring the existing KCH clinic that has been operational in Abu Dhabi since 2014.

The total value of the project is £130m and demonstrates a genuine partnership between a leading UK NHS Trust and financial institutions. It also highlights the support that Healthcare UK is able to give to NHS organisations looking to internationalise.

Healthcare UK introduced and facilitated the partnership between Ashmore and KCH, and the team at the British Embassy in Abu Dhabi. Advice was offered on local strategic choices, including choosing the right investment partners and sites for the hospital, shaping the communications strategy and providing validated introductions to UAE government stakeholders. Healthcare UK and the British Embassy also facilitated the high-level engagement of UK ministers in the announcement of the project.

The first of the new clinics will open in early 2017, followed by a multi-speciality hospital in 2018. The hospital will focus on acute and general medical services and four main specialities:

- + Paediatrics
- + Endocrinology
- + Orthopaedics
- + Obstetrics and gynaecology

In line with the operating model of the current clinic in Abu Dhabi, all staff and services will be fully integrated with KCH in London to ensure provision of quality, evidence-based healthcare to UAE and regional consumers.



The UK public and private healthcare system is considered among the top in the world. We are extremely excited to expand British healthcare internationally, particularly within the UAE. Our long-standing ties with the UAE will continue to strengthen with the presence of King's College Hospital and Clinics in Dubai, combined with the specialist emerging markets investment management experience of Ashmore Group plc.



The Rt Hon Alistair Burt MP,
Minister of State for Community and Social Care
at the Department of Health

Case study:

Facilities management of a prestigious new clinic in the UAE

OCS Group

OCS Group is a UK-based international business focused on delivering sustainable solutions to complex facilities management issues. OCS takes care of essential support services, enabling their clients to concentrate on their core activities.

OCS was selected to provide facilities management solutions for a prestigious new clinical facility in the UAE. OCS will be providing all services including central sterile services (CSSD), mechanical, electrical and plumbing (MEP) engineering services, building testing and commissioning, biomedical, engineering and security services. All of the OCS services provided will be linked to their smart computer aided facilities management (CAFM) solution, matching technology and service excellence with the exacting high-quality standards that the client requires.

After fully scoping and qualifying the opportunity, Healthcare UK were delighted to introduce OCS to the buyer at the very early stages of their project, including arranging a UK site visit for the buyer. This support continued throughout the procurement process. Healthcare UK's support for OCS continues, both in the UAE and other markets globally.

Case study:

Advising the Turkish Government on hospital development

Strategic Healthcare Planning

The UK is recognised for its expertise in managing the procurement and delivery of PPP hospitals. The Turkish Government has embarked on a major programme to expand hospital provision using a PPP model and therefore approached Strategic Healthcare Planning (SHP) for assistance to benefit from the UK's expertise.

SHP worked with Healthcare UK and several NHS Trusts with whom they have established relationships on a number of initiatives that support:

- + the procurement and delivery of contracted PPP hospitals
- + the transition and occupation of PPP hospitals from existing hospitals

SHP are working with Alder Hey NHS Foundation Trust, Leeds Teaching Hospitals NHS Trust, Mersey Care NHS Trust, University Hospitals of North Midlands NHS Trust, University Hospitals Birmingham NHS Foundation Trust, Royal Wolverhampton Hospitals NHS Trust and Worcestershire Acute Hospitals NHS Trust.

With the support and assistance of Healthcare UK and UKTI staff in-country, SHP's business in Turkey has developed, working with the Ministry of Health to support the development of 14 hospitals and advise on the emerging strategies for forensic medicine.

Brazil and Latin America

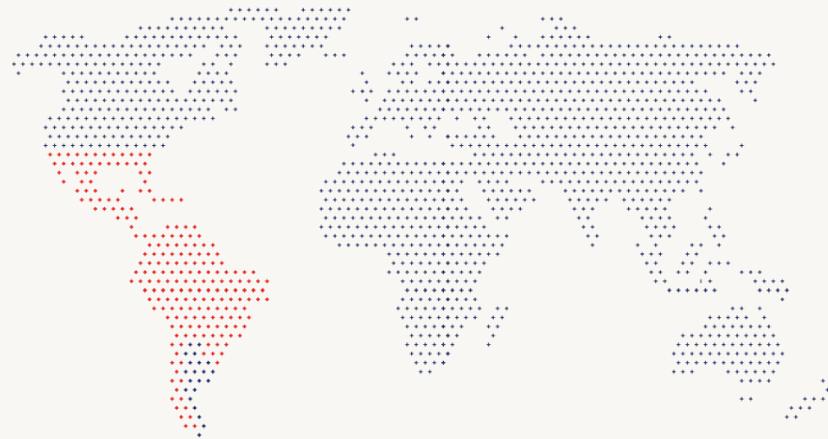
Performance overview

£329m

total value of 14 business wins.

£953m

value of qualified opportunities.



Opportunities for UK organisations

- + Brazil's healthcare expenditure of around \$190 billion is among the highest in the world, with more than half coming from private healthcare.
- + Brazil needs to tackle the growth in non-communicable diseases that has accompanied the country's increasing wealth and the rise of the middle class.
- + Financial pressures and public demand to modernise services is stimulating interest in the UK's capabilities in cost-effective, universal healthcare.
- + Public private partnerships (PPPs) are becoming an essential part of healthcare delivery, opening doors to UK expertise in this area.
- + Brazil has recently established an executive secretariat on infrastructure aimed at removing barriers to external investment in social infrastructure, which should lead to the Ministry of Health seeking greater private sector involvement and commercial expertise.
- + Throughout Latin America, concern over the Zika virus is leading to renewed interest in mosquito control, treatment of patients and research into the virus.

Case study:

Cancer patients in Brazil benefit from British technology

Paxman Coolers and EPTCA

Paxman are pioneers of scalp-cooling technology, which enables patients undergoing chemotherapy treatment for cancer to retain their hair.

The company identified Latin America as an important region for their growth and joined the UK delegation to Hospitalar, the largest medical exhibition in Latin America. This was the springboard to establish links with potential partners. Paxman and EPTCA became partners for the Brazilian market.

Having gained regulatory approval, the number of scalp-cooling installations throughout Brazil continues to increase, including one at the prestigious Albert Einstein Hospital in São Paulo. Through EPTCA, Paxman now have an exclusive deal with the largest chain of private oncology clinics in Brazil to install the technology in all their sites over the next three years.

Healthcare UK performance

During the course of the last financial year, Healthcare UK's activities were expanded beyond Brazil to include healthcare opportunities in Mexico, Chile, Peru and Colombia.

The prospects in Brazil remain focused on PPP hospital developments at the state level rather than the federal. This has been our most successful year in the region with contracts valued at more than £323m secured by British organisations.

A strong pipeline of opportunities related to the country's peace process after decades of civil war is beginning to emerge from Colombia. We recently hosted an inward delegation of state health ministers and officials to the UK. In addition, we have spoken at high-profile events in Chile and Mexico and are following up leads that offer extensive opportunities in these markets.

Highlights

The State Visit of the President Enrique Peña Nieto.

During the state visit of the President of Mexico, an MoU was signed between the two countries, providing the framework to develop more opportunities for British healthcare businesses in Mexico. Proposed areas for cooperation include primary care, infrastructure, clinical services and health systems development.

Launch of Healthcare UK in Peru.

Healthcare UK was formally launched at a ceremony in Peru in 2015 which featured the re-creation of the NHS dance scene from the opening ceremony of the London 2012 Olympic Games. The ceremony also hosted the signing of a healthcare MoU, promising bi-lateral co-operation in areas of mutual interest. The Embassy's strong ties with the national government, including with the President, have allowed us to fully understand the government's plans for the development of healthcare infrastructure. We will continue to work with the new government to exploit partnership opportunities for British business.

Royal visit to Brazil

Our highlight event of the year in the region was the Royal visit of HRH The Duke of Gloucester to Brazil. The Duke undertook an active programme of more than 20 engagements over the course of 4 days, and the visit supported the delivery of contracts valued at £297m. He will be visiting Chile and Peru in November 2016, once again in support of Healthcare UK.

Inward mission from Mexico to the NHS Health and Care Innovation Expo.

The Rt Hon Jeremy Hunt MP, Secretary of State for Health welcomed Eduardo Gonzales Pier, Mexico's Vice Minister of Health and Mikel Arriola, Head of COFRPRIS (Mexico's Commission for the Protection against Sanitary Risk) and colleagues to the NHS Health and Care Innovation Expo in Manchester held in September.

These senior decision-makers had the unique chance to see the best of NHS innovation under one roof at the Expo and visit Manchester's outstanding healthcare facilities. They saw first-hand how clinical services

Brazil and Latin America

are provided in the UK, in both hospitals and primary care. The delegation also visited the Innovation Centre at Manchester University.

Around 100 UK healthcare providers participated in seminars on overseas business opportunities organised by Healthcare UK at the Expo. They were able to hear directly from Dr Gonzales Pier about the potential for partnership with NHS organisations in Mexico.

Brazil Health Week

Twelve state health ministers from across Brazil visited London in November. They were hosted at Windsor Castle. The event was an excellent opportunity for NHS leaders and private healthcare companies to develop relationships directly with the ministers and understand how their healthcare needs could be addressed by collaboration with the UK. During the mission, the visitors were also hosted at the Institute of Global Health Innovation, Imperial College, London.

Case study:

PPP Supervision: supporting partnerships to improve healthcare in Peru

Currie & Brown and the Peruvian Ministry of Health

The National Institute for Child Health-San Borja (NICH) is the first hospital developed by the Peruvian Ministry of Health (MINSa) as a public private partnership (PPP).

The NICH is a 253-bed facility built by the public sector and operated through a 10-year PPP contract. The private partner maintains the facility and provides non-clinical services ranging from sterilization to hospital waste management; the MINSa remains in charge of delivering medical care.

In an effort to achieve the benefits of PPPs, public authorities are increasingly interested in establishing supporting mechanisms to monitor standards of service and manage the PPP contract. In preparation for this challenge, the MINSa commissioned Currie & Brown, a British firm dedicated to advising organisations in asset management and construction, including PPP advisory services, as the Contract and Operational Supervisor. They have been tasked with ensuring that performance and availability indicators are reached throughout the contract term. This commitment with a supervisory team stands out among similar PPPs for its duration throughout the contract term.

Currie & Brown also assisted in the transition toward a PPP model. Healthcare UK and UKTI staff in Lima have been supportive in fostering partnerships with the MINSa, bringing together expertise from both countries for the improvement of healthcare in Peru.

At the pre-operational stage, Currie & Brown's supervisory team contributed its expertise to ensure that all resources were in place and activities had been completed to begin operations. At the operational stage, the firm continues to facilitate processes to ensure the smooth running of the hospital.

India

Performance overview

£126m

total value of four business wins.

£994m

value of qualified opportunities.



Opportunities for UK organisations

- + India's healthcare market is estimated to grow to \$280 billion by 2020. It has identified a shortfall of 2.5 million hospital beds and 1 million doctors, compared to world-average per-person ratios.
- + India needs more doctors, nurses and paramedics to assure the availability of healthcare in the future. By 2017 the country will need 765,000 additional nurses and 110,000 professionals specialising in traditional (Ayurvedic) medicine.
- + India's health needs are changing. Cancer, obesity, diabetes and heart disease are all placing greater demands on the existing healthcare infrastructure.
- + India's private hospital chains are looking at partnering with organisations bringing international expertise into the country as a means of offering a world-class service and gaining competitive advantage.
- + India has just announced the first 20 of the proposed 100 smart cities programme which will involve an overall investment of £10bn. It is expected to significantly upgrade the healthcare infrastructure in these cities. The smart cities programme represents a wide-ranging large-scale opportunity for entire supply chains from the UK to commercially export their expertise.
- + The Indo-UK Institutes of Health (IUIH) initiative is a smart-cities-related opportunity where 11 healthcare ecosystems will be created across India, comprising general hospitals, teaching hospitals, a network of 89 polyclinics, a research institute and various related infrastructure. The initiative will enable 1.2bn Indians to access healthcare facilities equivalent to the best of the NHS. The plan represents an opportunity worth over £1bn and has already generated business worth £125m.

India

Healthcare UK performance

2015/16 has been Healthcare UK's most successful year in India, driven by the recent success of the IUIH initiative. This has not only provided the UK's supply chain with a clear commercial opportunity, but also paved the way for stronger engagement between the UK and the central and state governments in India.

The IUIH initiative has also demonstrated the opportunity for NHS trusts to commercialise their expertise in the Indian market. While the long-term opportunity remains to be established, this is an ideal starting point for greater engagement by NHS trusts with opportunities in India.

Healthcare UK has been providing intensive support to the project to assist IUIH in identifying NHS and private UK suppliers to contribute to this ambitious programme. Due to the size of the programme, India Healthcare is deemed to be a high-value opportunity.

Highlights

NHS Health and Care Innovation Expo September 2015

Senior representatives from the Government of Delhi attended the Expo and visited University Hospital South Manchester and The Christie Hospital. They were very impressed with what they saw as they are planning a major set of hospital and healthcare developments. The contact is being actively pursued to see how the UK can work with the State Government in its development programme.

Indian Prime Ministerial visit, November 2015

The development of the IUIH project reached a significant milestone during the visit of Prime Minister Modi to the UK in November. In the presence of Mr Modi and David Cameron, Ajay Gupta, MD & Group CEO, IUIH and Lord Kerslake, Chairman, King's College Hospital NHS Foundation Trust (KCH) exchanged the commercial agreement on the first IUIH-King's College Hospital partnership. KCH will be providing the NHS expertise to set up the institute and ensure its continuing quality management.

University of Derby Online

University of Derby Online has established a collaboration with Renaissance in India, an e-learning company that also supports the UK's e-Integrity online medical training products from Health Education England's e-Learning for Healthcare (e-LfH) programme.

Case study:

Taking the Best of the NHS to India

King's College Hospital NHS Foundation Trust and Indo-UK Institutes of Health

When KCH signed an agreement in November 2015 with the IUIH to develop a large-scale medical city project in India, it signalled a significant breakthrough for NHS trusts pursuing major opportunities in India.

KCH's role will primarily be designing and approving the clinical and governance structure in the hospital. It will establish the quality assurance framework to ensure that the delivery of services in KCH India is consistent with the quality of the hospital in London.



We would not have reached this point had it not been for the role that Healthcare UK played both in introducing us to the IUIH and in remaining closely involved at every stage. Their support and that of the British Government – here and in India – has been instrumental in this success and an important factor in our approach to pursuing such an ambitious project. The Board of KCH is excited about the prospect of contributing to the healthcare of the people of India and to bringing the learning that we experience back to the UK to further improve our domestic services. We therefore hope that this is just the start of a long and successful partnership with IUIH in India.



Richard Miller, Commercial Director,
King's College Hospital

Case study:

Technological solutions suitable for rural populations

Tumour Trace

Tumour Trace has developed a service which uses advanced technology to provide cervical smear results in ten minutes in a battery-powered box. The service needs only a minimum of training and no requirement to return samples to a lab. This is especially valuable for India which has a large rural population. Healthcare UK supported Tumour Trace to enter the Indian market through participation in a trade mission to India, followed by further visits which lead to trials of their service with clinical partners in Mumbai and New Delhi.

Overseas demand for UK expertise

Healthcare UK focuses on five aspects of healthcare where there is growing international demand and the UK offers a wealth of experience and innovative solutions.



Healthcare infrastructure services



Clinical services



Digital health



Education and training



Health systems development



Healthcare infrastructure services

UK companies are innovation leaders in all aspects of healthcare infrastructure services, from modelling, financing and design to construction and operation. Governments and healthcare organisations worldwide draw on UK expertise to support infrastructure projects of all sizes, from state-of-the-art medical cities to front-line community facilities.



Clinical services

As an established system with innovative ways of dealing with common healthcare challenges, the NHS is the model that governments and healthcare providers across the world turn to. International healthcare organisations can draw on expertise across the whole spectrum of medical, surgical and mental health services, from the management of long-term illnesses in primary care to diagnosing and treating rare conditions in specialist centres.



Education and training

Growing and ageing populations are requiring governments and healthcare organisations worldwide to find new ways of delivering high-quality education and training. Many are turning to the UK for support.

Close collaboration between a wide range of UK organisations (including universities, Health Education England and the Royal Colleges) ensures the seamless delivery of high-quality education and training. Healthcare UK helps our prestigious and cutting-edge clinical training facilities form international partnerships, enabling overseas healthcare providers to benefit from world-class doctors, nurses and the full range of allied health professionals, medical scientists and managers.



Digital health

The UK develops some of the most sophisticated systems in the world for tracking, managing and delivering patient-centred services. We help international healthcare providers tap into the UK's unique innovation environment, where academics and clinicians from world-renowned institutions work with policy makers and dynamic private sector technology companies. These partnerships can access the resources of the NHS to enable patients to benefit from tried and tested technology in areas such as telecare, telehealth, mHealth and eHealth.



Health systems development

World-class healthcare can only be delivered through an integrated system in which every part works to improve outcomes for patients. In the UK, expertise in areas such as funding, strategy, regulation, training, innovation and delivery comes together to make the NHS one of the world's very best healthcare systems. We work with the UK's rich ecosystem of public and private sector bodies to support international partnerships in every aspect of health system-development.

Healthcare UK helps British healthcare providers to do more business overseas. We do this by promoting the UK healthcare sector to overseas markets and building strong links with overseas governments, businesses, healthcare providers and academia. We connect these organisations with the unrivalled expertise of the NHS, the UK's thriving commercial healthcare industry and our world-renowned academic sector.

As specialists in healthcare partnership working, we act as the bridge between international demand for healthcare services, systems and infrastructure and the rich pool of UK know-how and capability in these fields.

Healthcare UK is a joint initiative between the Department of Health, UKTI and NHS England.

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