

Annual Review 2017/18

(for the year ended 31 March 2018)



HealthcareUK

A joint initiative between



Department
of Health &
Social Care



Department for
International Trade



Healthcare UK is a joint initiative of the Department for International Trade, NHS England and the Department of Health and Social Care. We help UK healthcare providers to do more business overseas, by promoting the UK healthcare sector to overseas markets and supporting healthcare partnerships between the UK and overseas healthcare providers. We partner with a wide range of UK private and public sector organisations, ranging from NHS Trusts, to academic institutions and the Department of Health and Social Care arm's length bodies.

We work with the NHS to strengthen its capability and capacity to operate and succeed internationally. International healthcare organisations work with us because we offer a trusted route for developing world-class health services. We use our networks to facilitate government-to-government engagement for large healthcare programmes.

As part of the Department for International Trade, we work with our overseas network of Trade and Investment Advisers located in British Embassies, High Commissions and Consulates in over 100 markets, providing tailored support to UK companies.

Contact us at:

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Contents

Introductions		Why the UK?	26
Baroness Rona Fairhead	4	Importance of the NHS to Healthcare UK	28
Ian Dodge	6	The UK Strengths	30
Deborah Kobewka	8	Regional Outline:	
Key Achievements	10	Middle East	32
Our Mission	12	Central and Eastern Europe (CEN)	34
Who are we? Our Purpose	14	China	36
Who we work with - our network	16	India	38
The Healthcare UK Advisory Board	18	Latin America	40
Healthcare UK Objectives	20	Looking Forward to 18/19	42
1. Identifying the biggest healthcare opportunities	22		
2. Engaging the UK healthcare sector in maximising export potential	23		
3. Promoting the UK Healthcare sector internationally	24		
4. Converting opportunities into export success	25		

Introduction

The UK's Department for International Trade (DIT) has overall responsibility for promoting UK trade across the world and attracting foreign investment to our economy.

As Minister of State for Trade and Export Promotion, I am tasked with promoting UK business overseas. This is a task made easy thanks to the formidable reputation UK businesses carry across the world. We possess world-leading companies in many sectors, but none more so than in healthcare. As the NHS celebrates its 70th birthday, I am delighted to champion ambitious and innovative UK companies delivering pioneering healthcare products and services across the globe.

DIT's mission is to enable the UK to trade its way to prosperity, stability and security by helping businesses export, driving investment, opening up markets and championing free trade. Supporting firms in the healthcare sector, a sector with enormous potential for future international growth, is integral to this mission. This is particularly true as countries look to UK businesses to help them diversify their economies, improve their public services and manage demographic change.

UK exports continue to grow at healthy rates, rising 4.4% to £621bn in the 12 months to June 2018. In the same period, Britain's renowned service sector (including healthcare) continues to thrive and is the second largest in the world based on export value.

To build on this success, in August, the Secretary of State for International Trade and I launched the Government's Export Strategy. This establishes a new national ambition to transform our export performance, raising exports as a proportion of GDP from 30% to 35%, taking us from the middle of the G7 to near the top. This is ambitious, but achievable. We have also recently established new approaches to supporting Outward Direct Investment and Foreign Direct Investment.

We have a world-leading healthcare sector, one that we should all take pride in. This is a sector with the potential to bring instrumental change to populations across the world, and this Government is committed to helping UK businesses take the lead in this challenge.



Baroness Rona Fairhead

Department for International Trade
Minister for Trade and Export Promotion

Introduction

In 2018 the National Health Service (NHS) celebrated 70 years since its foundation: an important milestone for the world's largest integrated health system. Today the NHS treats one million patients a day, for the 64.6 million residents of the UK.

The NHS continues to be ranked by the US-based Commonwealth Fund as the leading health system in the world. It has an extraordinary array of capabilities and experiences that are of great interest to other nations around the globe - whether our outstanding research and life sciences base; our education and training systems; our work on prevention and public health; the ground-breaking programmes on genomics, digital, AI, data and informatics; or service delivery such as in primary care, integrated and personalised care, mental health, and specialist services; as well as our system reforms - both operational efficiency programmes, as well as system transformation as we respond to the challenges posed by an ageing society.

Of course, high quality care for patients at home will always be the top and over-riding priority for NHS organisations. For many local NHS leadership teams, facing significant quality, operational or financial challenges, international exports will be a distraction from the day job. At the same time, a number of trusts are proving how their international projects can generate revenue for reinvestment in domestic facilities and services, for the benefit of patients in England. NHS England will continue to back this important work. And through the increasingly impressive work of Healthcare UK, we will look to accelerate the scale of NHS export wins.

Ian Dodge

NHS England
National Director - Strategy and Innovation



Introduction

2017/18 has been another busy year for Healthcare UK as we approach our sixth anniversary. We have supported 250 UK business export projects in over 20 countries. Over the last two years, with our support, UK organisations have won £1.3 billion of export contracts.

Our mission is to fully mobilise the best of UK Healthcare expertise by increasing the UK's access to the fast-growing international markets for healthcare services. Market research this year identified numerous countries that required UK capability and expertise.

Healthcare UK prioritises its activities through High Value Campaigns in geographies where there is most opportunity for UK organisations. Through our network of healthcare experts located in markets, we identified £3.4 billion worth of lead opportunities during 2017/18 and connected them to UK suppliers.

This year we also developed an offer strategy and a suite of eleven offers to identify where UK healthcare strengths align with suppliers. These UK healthcare offers support and educate our colleagues in embassies and consulates and promote our offer to overseas customers using marketing and events.

Aligned to our High Value Campaigns we ran events overseas to bring together overseas buyers with UK organisations and showcase UK expertise. We hosted ministerial and bilateral meetings and showcased UK capability and expertise at international exhibitions including Arab Health and Hospitalar. Additionally, the team led 13 successful inward and outward trade missions, for the UK, India, China, Latin America (LATAM) and the Middle East.

As part of our strategy to encourage more UK companies to begin or increase their export activities we introduced a UK Key Account Management programme. 120 healthcare companies and NHS organisations now have a dedicated account manager.

The programme delivered over 400 supplier engagement meetings giving better understanding of how Healthcare UK can support their export needs, and matching suppliers with overseas opportunities and buyers. We have expanded our supplier network to over 500 organisations during 2017/18.

We also completed a successful pilot that will lead to the launch of a new Export Catalyst service in September 2018. This will offer a range of services to better support NHS organisations as they embark on their export journeys. In 2017/18 we saw more NHS organisations than ever before winning overseas business and we expect the Export Catalyst service to increase export wins.

It remains a great privilege to lead the Healthcare UK team at such an interesting time. We have ambitious plans for 2018/19, some of which are described in the forward view section of this report. I look forward to continuing to work with healthcare organisations both overseas and in the UK as well as our many and varied stakeholders.

Deborah Kobewka

Department for International Trade
Managing Director of Healthcare UK



Key Achievements

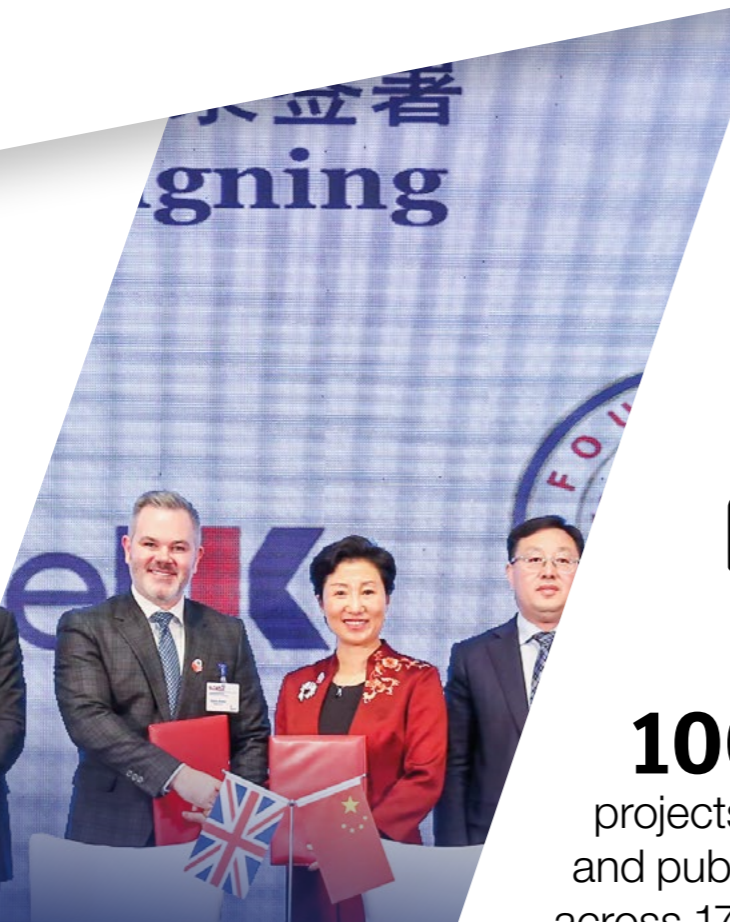
2017/18

UK has the best healthcare system in the world

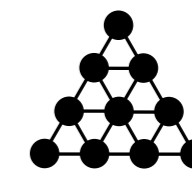
Commonwealth Fund
2014, 2016, 2017



Achieved **£700m+** Export wins, greater than 16/17



Supported **100+** Export projects with private and public UK suppliers across 17 countries



Developed suite of **11** UK healthcare offers and supporting strategies

Delivered **£100m+** Export wins for the NHS



Led **7** successful outward Missions to India, China, Latin America and Middle East

£1.3bn Export wins supported by Healthcare UK so far between 2016-2018



Delivered over **400+** supplier engagement meetings in 17/18

Our Mission

Healthcare UK's mission is to fully mobilise the best of UK Healthcare expertise to improve the economic and social well-being of the UK through global trade.

We achieve this through increasing the UK's access to fast-growing international markets for healthcare services.

In 2017/18, we focused our activities on 18 priority markets

- China
- Hong Kong
- Bulgaria
- Czech Republic
- Poland
- Romania
- Slovakia
- Brazil
- Chile
- Colombia
- Mexico
- Peru
- India
- United Arab Emirates
- Saudi Arabia
- Kuwait
- Qatar
- Oman

We concentrate on 5 aspects of healthcare where there is growing international demand.



Education & Training



Clinical Services



Healthcare Systems Development



Digital



Infrastructure Services



Who are we? Our Purpose

Healthcare UK is a joint initiative of the Department for International Trade, the Department of Health and Social Care and NHS England

Our aims are:

- helping overseas healthcare organisations find a UK healthcare provider to supply the services and expertise they need
- helping UK healthcare providers raise their international profile and win contracts overseas
- encouraging UK healthcare providers to work together in consortia so they can bid for major overseas projects
- working with governments to make it easier for UK healthcare providers to do business overseas
- developing the UK public health sector's ability to work internationally.

Escala

"It was a pleasure to work with DIT. Everyone we encountered were very professional, and the connections they have helped us make has boosted the scope of Escalla's work in the UK, the Kingdom of Saudi Arabia and globally".

Siva Singh, EMEA Director of Escalla

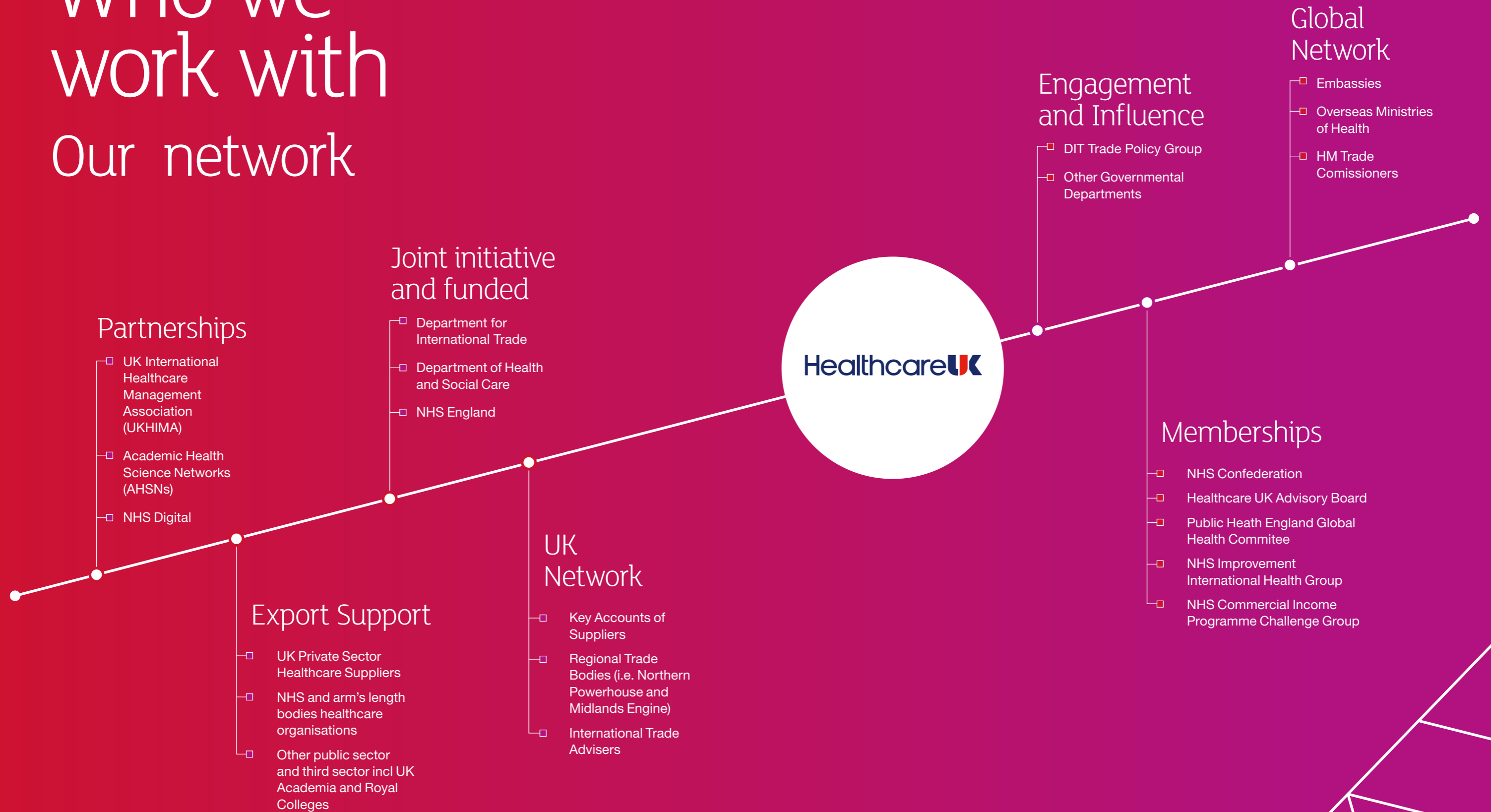
Since we were founded in 2013, we have supported 250 UK business export projects in over 20 countries. With our support, UK organisations won over £1.3bn of export wins in 2016/17 and 2017/18.



£1.3bn

Export wins supported by
Healthcare UK so far between
2016-2018

Who we work with Our network



The Healthcare UK Advisory Board

The Board comprises a broad spectrum of NHS and industry leaders who help Healthcare UK articulate and capitalise on the UK's healthcare export offer, mobilise the UK supply chain around international opportunities, and proactively generate demand for our healthcare services.

I am proud of the progress Healthcare UK has made in the last two years and the central role it has played in building new markets, new offers and a strong brand internationally. Our mission in the next year will remain very focussed on providing a showcase for great, British, health and care services and realising the export potential of our world class health system.

Noel Gordon, Chair, Healthcare UK

The Healthcare UK Advisory Board supports the development and delivery of Healthcare UK's strategy by sharing its international trading expertise and geographic strategic insights to help Healthcare UK deliver impact.

Noel Gordon, NHS Digital, Chair

Deborah Kobewka, Healthcare UK, Managing Director

Dilip Chauhan, Department of Health, Commercial Policy Advice & Capability

Duncan Selbie, Public Health England, Chief Executive

Gill Morgan, NHS Provider, Chair

Ian Crichton, Serco, Managing Director

Ian Cumming, Health Education England, Chief Executive

Ian Dodge, NHS England, National Director - Strategy & Innovation

Lord Kakkar, Department for International Trade, UK Business Ambassador for Healthcare and Life Sciences

Matt Sowrey, Healthcare UK, Head of Healthcare Supplier and engagement & capability

Natalie Bain, Healthcare UK, Head of Strategic Planning and Performance

Robert Oldham, Department of Health, Policy Lead

Roland Sinker, Cambridge University Hospitals NHS Foundation Trust, Chief Executive

Steve Melton, mydentist Managing Director

Tessa Green, Moorfields Eye Hospital NHS Foundation Trust Chair

Wayne Close, BUPA International Chief Executive.

“

Healthcare UK are fundamental in facilitating international healthcare collaborations. They not only identify, but also initiate and help to sustain health and business endeavours between the UK and our counterparts overseas. Their efforts have seeded the need for prevention on a global scale, which is something I am very happy to see.

”

Duncan Selbie
Chief Executive, Public Health England

“

Healthcare UK performs a vital role in supporting commercialisation abroad of Britain's considerable Health Care capabilities. Given global healthcare challenges today this is as ethically as it is economically desirable. It has been brilliant to see the organisation mature so much over the last few years. The board has provided me with very useful insight into the challenges of balancing the needs of patients, businesses, NHS Trusts, foreign countries and the UK government both at home and abroad.

”

Ian Crichton
Serco, Managing Director (Health).

“

Healthcare UK's combination of experienced civil servants and industry specialists brings a diverse range of expertise to both public and private UK organisations. This delivers real value in raising the profile of UK healthcare services overseas and supporting them in developing their export capabilities.

”

Roland Sinker
Cambridge University Hospitals NHS Foundation Trust, Chief Executive

“

The NHS has a lot to offer the rest of the world. Some NHS organisations are already active overseas. Healthcare UK is helping these organisations and working with others interested in this activity. I would encourage interested people to talk to the Healthcare UK team.

”

Dame Gill Morgan,
NHS Providers, Chair.

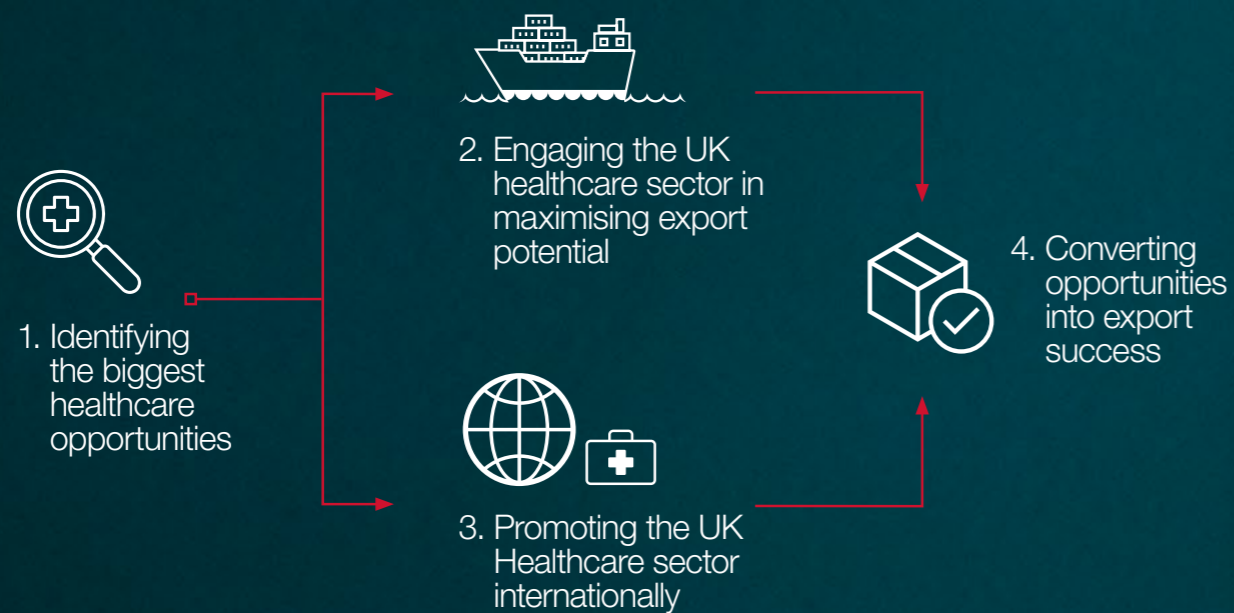


Healthcare UK Objectives

Healthcare UK has the following export objectives to increase the UK's share of exports in Healthcare services:

- 1. Identifying the biggest healthcare opportunities:**
enhancing and sharing our in-depth market knowledge and experience of commercial opportunities for UK healthcare
- 2. Engaging the UK healthcare sector in maximising export potential:**
raising awareness of the vast range of exporting opportunities to suppliers and developing the capability of public sector healthcare organisations to respond to international demand for their expertise

- 3. Promoting the UK Healthcare sector internationally:**
engaging potential buyers and influencers on UK capabilities overseas through campaigns and events
- 4. Converting opportunities into export success:**
connecting overseas decision-makers and buyers to UK organisations that can meet their needs, helping them to build lasting and fruitful partnerships



South London and Maudsley NHS Foundation

South London and Maudsley NHS Foundation Trust started to provide clinical services in the UAE. Maudsley Health worked with a local partner to fill a gap in child and adolescent mental health provision services, gaining access to local knowledge and logistics and opening doors for Maudsley Health in the region. DIT and the British Embassy facilitated the opening of the Abu Dhabi clinic by the Duke of York, gaining positive publicity and engagement at the highest Abu Dhabi government level.

1. Identifying the biggest healthcare opportunities

£3.4bn export value of qualified leads identified

£3-7bn potential contract value annually for the UK over the next ten years

Healthcare UK focused on a diverse portfolio of five key High Value Campaigns in 2017/18. These were selected based on the size and scale of the opportunities, the openness and receptiveness of UK suppliers to doing business in each market.

This year we continued our existing campaigns in China, India, Latin America and Middle East and launched a new campaign to eastern European markets.

Through our extensive network of DIT contacts across these HVCs, we identified £3.4bn worth of qualified lead opportunities. All these markets are undergoing major healthcare changes and are seeking UK healthcare expertise. We used our **in-market experience** to identify key areas of need and demand across health economies and systems in these markets and connect them with suitable UK suppliers.

In 2017/18 we conducted **external market research** to focus our efforts and resources on the most accessible overseas opportunities for UK organisations.

We also continue to **gain advice from our experts**, including our advisory board and the Department for Health and Social Care and NHS England boards. We are also engaged with our networks of experts in DIT, including International Trade Advisers (ITAs) and UK based regional trade teams.

2. Engaging the UK healthcare sector in maximising export potential

Delivered over 400+ supplier engagement meetings in 2017/18

500+ total UK healthcare suppliers in our network

Delivering seven products for Export Catalyst pilot

We have continued to develop strong relationships with UK healthcare organisations.

In 2017/18 we focused on developing our supplier engagement strategy. We want to build and develop the supply of UK healthcare organisations to respond to **overseas commercial opportunities**, in the short, medium and long term.

As part of this, we have fully implemented a **Key Account Management (KAM)** team and system who have delivered 400+ supplier engagement meetings including promoting exporting, giving advice and matching them with potential buyers. A third of these have been with the NHS and arm's length bodies. We have expanded our supplier network to over 500 UK healthcare suppliers in 2017/18.

Additionally, we completed our successful pilot for our new **Export Catalyst initiative** which will be launched in September 2018. This new programme will offer a range of services that will better support NHS organisations as they embark on their export journeys. In the last half of 2017/18 we delivered our initial seven products and received great feedback from NHS Trusts in the pilot.

We powerfully raised the profile and appeal of exporting for UK healthcare organisations at **NHS Expo 2017**. Through the event's stand-out exhibition stand and a rich programme of well attended events, the team engaged with over 5,000 attendees from the UK, and the 52 overseas delegates, from seven countries hosted by the UK government.

Our partnership with **UK International Healthcare Management Association (UKIHMA)** allows us to continue to identify attractive opportunities for the membership to consider. 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.



3. Promoting the UK Healthcare sector internationally

Developed a suite of eleven UK healthcare offers and supporting strategies

Completed six successful inward trade missions

Completed seven successful outward trade missions

Healthcare UK participated in or managed over 20 high-level events, missions and meetings in 2017/18. These included ministerial visits, inward visits, outward missions and exhibition conferences.

The strategy to identify where UK strengths in healthcare align with suppliers willing to export, led us to develop a suite of eleven offers.

In India, NHS Trusts and partner companies met potential customers marking the 70th anniversary of both the NHS and independent India. The delegation met senior healthcare leaders from private and government sectors at round tables, meeting over 250 potential customers in three cities.

In China, the UK government facilitated more than £70 million of business between the health sectors in Britain and China at the annual **UK-China High-Level People-to-People Dialogue** event. The event, hosted by former Health Secretary Jeremy Hunt, brought together delegations from the business, academic, science and policy sectors.

In Latin America, Healthcare UK and NHS Digital helped build new relationships and trade openings in Brazil on an eight-company mission to Sao Paulo to **Hospitalar 2017**, the biggest healthcare trade event in Latin America, with the UK presence making a significant impact.

In the Middle East, Healthcare UK and four outstanding UK companies showcased digital applications in prevention, quality and innovation at **Arab Health 2018**. A major contract between Babylon and the Saudi Ministry of Health was signed on the event stand, and other contract discussions are proceeding.

4. Converting opportunities into export success

Year on year growth in export wins

£700m+ Export wins

£100m+ of Export wins for the NHS

£20m+ of Export wins for Academia

Over 100+ Export deals with private and public UK suppliers across 17 countries

Clinical services contributed the most export wins with £200 million, while infrastructure followed closely behind with £180 million. Digital health and education and training exports also rose, with £40 million and £50 million of export wins won respectively, with both increased from 2016/17.

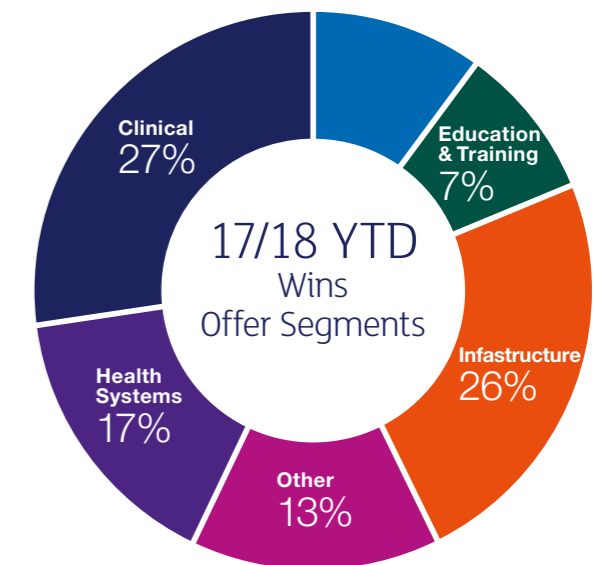
China was by far the most successful market in terms of value with export wins trebling, while in our second biggest market Middle East export wins increased by 50%

HVC	EW Actual 17/18 £	16/17
China	363m	▲
CEN	32m	▲
LATAM	71m	▼
India	60m	▲
Middle East	186m	▲

We have supported year-on-year growth in export wins by continuing to help UK healthcare businesses to grow into global markets.

We have helped win £160 million more of business in 2017/18 than in 2016/17. The value of export wins has increased significantly in most of our priority markets compared with the previous year. The time taken for commercial opportunities to progress from lead to contract can take many months, so this momentum reflects the significant efforts of the Healthcare UK team over recent years.

We have also helped to increase NHS exports, supporting the winning of £100 million of exports for the NHS.



Why the UK?

The global market for healthcare services is growing as governments deliver more healthcare capacity and quality to their populations. Global healthcare spend is growing at around 7% a year and recent research estimates that there is a winnable contract value of between £3-7 billion annually for the UK over the next ten years.

The UK has the largest integrated health system in the world and with its expertise in demand globally, is well placed to realise this opportunity.

Why the UK?

- The UK is at the forefront of research and innovation across life sciences, healthcare, medical devices and digital technologies
- The NHS has clear strategies to improve prevention, diagnosis, treatment and care until the end of life
- The UK has many world-famous hospitals and universities and a thriving private sector for healthcare, technology, training and infrastructure
- 70 years of an integrated, comprehensive healthcare system, rated the best in the world for patients, population and taxpayers (Commonwealth Fund, 2017)
- Continuous innovation (e.g. New Models of Care, Pioneer sites, Accountable Care Systems).



Importance of the NHS to Healthcare UK

The NHS is widely respected as a world-leader of high quality healthcare, consistently ranked as the top healthcare system in the developed world.

To help the NHS respond to the demand for UK healthcare services and expertise and to generate income to be reinvested into the NHS, NHS England and the Department for Health and Social Care have funded Healthcare UK since 2013 to develop NHS export capacity.

In 2017/18, as well as support resulting in £100m of export wins, DIT's in-depth review of where Healthcare UK could offer greatest value to NHS organisations has resulted in a step change bringing new forms of tailored support.

We developed the concept of the Healthcare UK Export Catalyst and tested initial products in a pilot programme, run in partnership with Yorkshire and Humber AHSN and delivered to NHS Trusts in the North.

This specialist NHS export support service features bespoke consultancy and training sessions, support in identifying priority markets, facilitating networking and mentoring and an export library. We also improved understanding and awareness through promotion of case studies and by founding an Exporters Forum, to be launched at the Health and Care Innovation Expo 2018.

Many of our new workstreams show encouraging results, such as the positive feedback gained from participants of the Healthcare UK Export Catalyst pilot programme.

Alder Hey Children's NHS Foundation Trust

Alder Hey Children's NHS Foundation Trust began exporting innovative clinical and managerial expertise to Dubai in 2015. Healthcare UK provided comprehensive support, training and advice plus networking and introductions to key healthcare organisations and provided invaluable local knowledge about differences in business cultures.

"The Trust strategy for 2014-19 included expanding international patient services and developing an international presence. The plan was to build on the international profile of our clinicians and explore opportunities to develop strategic partnerships with the support of Healthcare UK," Louise Shepherd, CEO Alder Hey Children's NHS Foundation Trust

The UK Strengths

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



Clinical services.

As an established system with innovative ways of dealing with common healthcare challenges, governments and healthcare providers across the world can draw on NHS expertise in healthcare services including:

- | | |
|------------------------------|--------------------|
| a. Cancer | e. Genomics |
| b. Diabetes | f. Integrated Care |
| c. Urgent and Emergency Care | g. Mental Health |
| d. Fertility | h. Primary Care |



Healthcare infrastructure services.

The excellence of UK health planners, architects, engineers, facility operators and managers underpin the success of our NHS. UK expertise supports infrastructure projects of all sizes, to deliver care which is safe, responsive, high quality and designed around patients' needs.



Digital health.

The NHS is unique because it has evolved to meet the varying needs of local patients, whilst being able to link up at a national level and make the best use of its vast estate of national assets and resources. Dynamic technology companies work with academics, clinicians and policy makers in a culture of collaboration to develop solutions that meet the needs of patients and clinicians alike. By using tried and tested solutions from the UK, overseas clients can meet the needs of patients, clinicians and payers throughout the patient pathway in areas such as telecare, telehealth, mHealth and eHealth.



Education and training.

Governments and healthcare organisations worldwide are turning to the UK for support in new ways to deliver high quality education and training in healthcare for growing and ageing populations. The UK education and training sector is well-positioned to export:

- Multidisciplinary clinical education & training
- Healthcare leadership & management training
- Consultancy & advisory services
- Bespoke education & training
- English language training for healthcare professionals

The UK's international healthcare education and training offer comprises a wide range of colleges, universities, Royal Colleges, NHS Trusts, private and public providers.

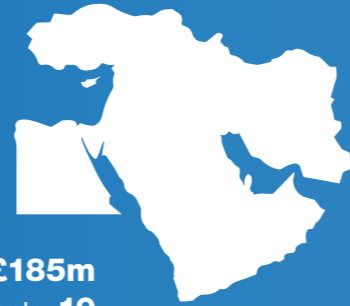


Health systems development.

In the UK, expertise in areas such as regulation, quality improvement, new models of care and innovative clinical protocols 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.

Regional Outline:

Middle East



Total export wins: **£185m**
Total projects: **19**

Opportunities for UK organisations – the Middle East

Healthcare spend by 2024 is set to be:

\$3.3bn in Bahrain, \$4bn in Oman, \$8.5bn in Kuwait, \$11.9bn in Qatar, \$25.7bn in the UAE and \$61.2bn in Saudi Arabia.

- The Middle East's healthcare challenges feature rapidly growing populations and income levels, rising life expectancy and a high incidence of long term conditions
- Digital health is high on the agenda of Middle East providers, and opportunities range from electronic patient records to solutions that help manage chronic diseases
- There are capacity-building healthcare education and training opportunities as reliance on staff from other countries reduces and healthcare expertise is developed locally, with the UK being looked upon as a go-to partner for programmes in this area
- Middle East health providers look to the UK to develop clinical partnerships ranging from consultancy opportunities to hospital management, in relevant areas such as oncology, mental health, cardiology and women's health.

Healthcare UK performance

An ambitious target of £250 million was set for 2017/18 healthcare exports to the Middle East.

£179 million was achieved - a 40% increase from FY2016/17.

Digital Health has comprised a large part of the target achieved as well as new opportunities coming into the pipeline.

There was significant activity in clinical services where partnerships were formed such as The South London and Maudsley and the UAE Ministry of Health and Prevention to deliver mental health services in the UAE, as well as new primary care opportunities. The opening of several new hospitals in the Middle East resulted in concluded deals with UK facilities management suppliers.

For the 2018/19 pipeline we plan to increase clinical services opportunities, and are focusing on UK organisations that can collaborate to meet the demand for public private partnerships (PPPs) across the Middle East.

Key Highlights

Arab Health January 2018, Dubai

- Healthcare UK delivered a wide-ranging programme of activities at Arab Health 2018, including showcasing four digital health innovators – Babylon, i5 Health, iamYiam and Helicon Health. All our activities enabled UK companies to gain a better understanding of the healthcare opportunities in the Gulf and develop contacts with future partners.

Joint Executive Committee (JEC) - March 2018

- Caroline Dinenage MP, Minister of State at the Department of Health and Social Care hosted a delegation from Saudi Arabia led by His Excellency Dr Tawfiq Al Rabiah, Minister of Health for the first Joint Executive Committee. The meeting, which took place during the visit of His Royal Highness the Crown Prince of Saudi Arabia, included contract and MOU signings and policy discussions on digital health, patient safety and Public Private Partnerships (PPP).

Trade Mission to Qatar, March 2018.

- Sixteen UK healthcare organisations visited Qatar on a trade mission. British Embassy Doha colleagues organised a programme to introduce the Qatar market and its healthcare opportunities, as well as introducing key buyers.

"Healthcare UK have helped Helicon Health enormously. The sheer organisation in terms of introducing us to people within the market who understand the challenges but are also interested in helping us has been fantastic."

Tony Bowden, Helicon Health

"Healthcare UK has been brilliant in bringing us here. The organisation has been impeccable. I have been here before and I have never seen such a good set up as we have here provided by Healthcare UK." **Ian Davies, i5**

"Healthcare UK has been a tremendous partner for us. They helped us build bridges with different countries and different continents to help us expand and grow our business."

Lorena Puica, iamYiam

"Healthcare UK has been a big part of Babylon's journey since we first began. A very forward-thinking organisation which is very proactive at finding organisations like ourselves and so far, have helped us in Asia, the Middle East, the US and Africa. We're always welcoming to the partnerships and opportunities they provide to us."

Ollie Finding, Babylon

Regional Outline:

Central and Eastern Europe

Total export wins: **£32m**
Total projects: **6**



Opportunities for UK organisations – CEN

(Poland, Czech Republic, Slovakia, Bulgaria and Romania)

- Economies among the highest annual growth rates in the EU - typically 3%
- Total spending on health per capita c.£1413
- Accounting for almost 8% of GDP
- Many healthcare projects supported by EU funding
- Challenges in upgrading healthcare infrastructure to bring them up to western EU standards
- Digital health opportunities for national digital health strategies, including electronic patient records
- Central government control of healthcare budgets
- Governments wish to rapidly improve care for ageing populations placing strain on welfare services far behind western EU countries
- The NHS, UK welfare models, governance, equipment and suppliers are well respected

Healthcare UK performance

The CEN 2017/18 campaign target was £30m, surpassed by achieving £32m.

A strong pipeline of opportunities was developed through stakeholder engagement, market intelligence and promoting the UK healthcare offer which will continue to deliver results in future years. Digital Health formed a major part of the total result.

Fake drugs are a massive problem worldwide and UK expertise was promoted by winning multimillion pound tenders across the region. For example, a UK supplier implemented their certified National Blueprint Solution supporting the EU Falsified Medicines Directive to ensure all medicines have a unique identifier and tamper-evident seal.

For 2018/19 we will continue to promote digital health as well as new opportunities for clinical services, infrastructure and education and training.

Key Highlights

Falsified Medicine Engagement Events

Stakeholder events in Bulgaria and Czech Republic to support a UK digital health supplier engage with Health Ministers, Drug Control Authorities, Drug Manufacturers, wholesalers and distributors.

Papworth Hospital NHS Foundation Trust visit to Poland, February 2018

The Director of Nursing from Papworth presented the UK model of patient participation in healthcare decisions at Patient Model Conference in Poland.

Digital Hospital Conference, Slovakia, April 2018

Speakers from NHS Digital visited Slovakia along with a mission of UK digital health suppliers to present the UK offer. The reception was attended by hospital and medical Directors, government decision makers and tech companies.

“Working internationally is an important aspect for Imperial College Health Partners (IChP) both to spread best practice and create export markets for UK companies but also to learn from other healthcare systems. Amongst other countries, we have focused on Slovakia supporting the local Government in developing a Life Sciences strategy as well as regional health groups to move towards integrated care systems. Healthcare UK and the British Embassy in Bratislava have been incredibly valuable in building relationships and navigating the Slovakian healthcare system and we are grateful for their ongoing support.”

Dr Axel Heitmueller, Imperial College Health Partners

Regional Outline:

China



Total export wins: **£363m**
Total projects: **52**

Opportunities for UK organisations – China

- Primary care is in great demand as China attempts to shift from hospital care to tertiary and primary care models
- Of the £350 million export wins in healthcare in 2017/18, a significant proportion were private international patients or training contracts between Chinese multipliers and UK NHS hospitals.

Healthcare UK performance

The campaign for China in 2017/18 was the most successful for Healthcare UK, generating £200 million of export wins – from private international patients, working with agents and NHS trusts.

The promotion of the UK as a destination for Chinese private patients has been successful. And the campaign has supported universities to meet Chinese counterparts to develop joint campuses or courses. Additional activity has been focusing on building on Chinese interest and demand for UK oncology expertise.

In high level training and education, we have supported observerships for doctors and bespoke courses for organisations such as BHGF. We have also been supporting development of NHS-led consortia through Northumbria's work with Rongqiao group.

Key Highlights

Healthcare Education and Training mission

In November 2017 we brought 13 UK companies to China. The Prime Minister visited China in January 2018 bringing the Secretary of State for International Trade Liam Fox, who presided over a Future of Medicines event which saw ten MOUs signed.

Future of Medicine event

The Secretary of State for Trade witnessed UK-China deal signings with TPP and Medopad at the event in Beijing. The event celebrated the future of medicine through stronger relationships between our two countries in personalised medicine, artificial intelligence and digital health.

People-to-People Dialogue

Healthcare UK was integral in facilitating more than £70 million of business between the health sectors in Britain and China at the annual UK-China High-Level People-to-People Dialogue event.

“It is incredibly exciting to exchange ideas and knowledge with such an important partner. Our relationship is built on mutual trust and respect and this year’s dialogue has only strengthened our bond”

Former Secretary of State for Health, Jeremy Hunt at annual UK-China High-Level People-to-People Dialogue event

Regional Outline:

India



Total export wins: **£59m**
Total projects: **14**

Opportunities for UK organisations – India

- The Indian healthcare market:
 - estimated to be around £100 billion
 - growing to around £280 billion by 2020
 - per capita spend of around \$70 - compared to around \$4000 in the UK
 - this significant gap will narrow further
 - Challenges exist on ease of doing business and low-cost operations
 - Low-margin, high-volume market
 - Fragmented landscape of buyers and strong domestic and international competition.
- The growth of large scale, direct to patient digital platforms for healthcare such as Reliance Jio's Jio Health and Ask Apollo from Apollo Hospitals
- Fast-growing home-healthcare featuring companies such as Call Health which relies on a combination of trained personnel, advanced technology and innovative care pathways
- A greater shift towards specialist care with a focus on oncology and cutting-edge therapy such as Proton Beam
- Increasing growth of venture capital and private equity investor interest in the past 5 years, with transaction value increasing from 94 million USD (2011) to 1,275 million USD (2016) .

Healthcare UK performance

The India campaign achieved £59.5 million of export wins. This is a 25% improvement from £47.1 million in 2016/17.

Healthcare UK pursued two areas of focus:

- trade missions to generate new opportunities in innovative digital health and equipment/ diagnostics and specialised clinical services such as Cancer and Diabetes.
- the Indo-UK Institute of Health project: a grand vision to build 11 medical cities supported by a large clinic network.

Key Highlights

Trade Missions

- We delivered three trade missions in India:
- February 2018: 70 years of NHS innovation led by Sir Malcolm Grant (chair of NHS England), Sarah Wilkinson (CEO of NHS Digital) and featuring 15 leading innovators from the UK.
- November 2017: Back-to-back trade missions on Diabetes and Cancer, featuring leading UK clinical centres of excellence such as the Christie Hospital, Great Ormond Street Hospital and Bupa Cromwell Hospital.

Indo UK Institute of Health (IUIH)

- Healthcare UK continued its robust support for the major Indo UK Institute of Health (IUIH) programme to build 11 Medicities and up to 5000 clinics in India in partnership with NHS Trusts, global and UK suppliers. As the programme progressed with agreements with state governments and land acquisitions in India, Healthcare UK supported the programme in identifying and introducing UK suppliers, supporting the dialogue with NHS Trusts, working with Health Education England on an Earn Learn and Return Scheme for IUIH, identifying the UK component of agreements with global suppliers of medical equipment, clarifying the conditions for UK Export Finance support, responding to the IUIH Information Systems and Workforce strategies and working with the Indian High Commission on the Access India Programme.
- The programme produced export wins with a value of £46m in 2017/18, the major contributor to Healthcare UK's target for the India Campaign.

"I was pleased to lead Healthcare UK's 70 Years of NHS Innovation trade mission to India in February to promote collaboration and mutual trade in tackling India's healthcare challenges. Healthcare UK identifies real excellence in the NHS Trusts and companies that they recruit to the mission. They work with their colleagues in the British High Commission to bring genuine and valuable potential customers and government representatives to meet with them and they provide me with excellent briefing and support during the event." **Professor Sir Malcom Grant CBE, Chair, NHS England**

"We could not have made the progress we have without the support of Healthcare UK. They have consistently given us good advice on developing our programme for Available, Affordable, Accountable Healthcare for All in India. They have introduced us to suitable partners and suppliers, supported our engagement with the NHS and worked with colleagues in the British High Commission India to give us access and support to top flight UK and Indian ministers and officials to help progress the programme. This includes the Joint Task Force, ceremonial foundation stone events and the 70 Years of NHS Innovation trade mission. Healthcare UK's support is highly appreciated." **Ajay Rajan Gupta, CEO, Indo UK Institute of Health**

92% of participants of the Healthcare UK's trade mission to India gave the team the highest rating for "the professional, helpfulness and overall service of DIT representatives during the mission." Comments and feedback received included:

- "Team DIT, Healthcare UK... have been exceptional, both with their knowledge and contacts; glad we have them on our side." **Rau Kumar, Cyber Liver**
- "Team were excellent, very professional and helpful. All events ran smoothly." **Barry Graham, Reader, Clinical Proteomics, University of Manchester**
- "At the moment it's [the] beginning of a long journey so the introductions we got... may be invaluable. Excellent organisation and support. A big thank you." **Dzidek Sambat, CMM**

Regional Outline:

Latin America

Total export wins: **£71.8m**
Total projects: **10**



Opportunities for UK organisations – Latin America

(Brazil, Mexico, Chile, Peru and Colombia)

Opportunities for UK organisations –Latin America (Brazil, Mexico, Chile, Peru and Colombia)

- Public private partnerships are an essential part of healthcare delivery
- Digital health an increasing priority for governments, particularly around health records, service design and transformations, electronic document management and data analytics
- Opportunities brought by the need to tackle non-communicable diseases resulting from new affluence
- Focus on staff training and retention means the UK has opportunities to promote observerships, online courses and visiting programmes
- Healthcare programmes trending to preventative care, reducing cost and pressure on clinics and hospitals.

Healthcare UK performance

The Latin America campaign delivered export wins worth £71.81 million – comfortably surpassing its £45.5 million target.

The focus was to build market intelligence in unfamiliar regions and BUPA benefitted from this in Chile, where we supported its large export win for the provision of healthcare services across the country.

After success in PPP hospital developments in Brazil last year, we expanded our reach for similar opportunities in other regions. In Columbia we focused on showcasing UK expertise in PPPs and building strong relationships between local governments and UK infrastructure specialists. A UK consultant secured a contract providing technical advisory services to Bogota in its hospital PPP programme.

The Latin American countries continue to look to the UK for expertise and delivery, and our aim in 2018/19 is to promote the UK's world-class offer areas in clinical services and education and training, by mobilising resources such as the Prosperity Fund.

Key Highlights

Hospitalar, Sao Paulo Brazil, May 2017

Healthcare UK and NHS Digital led a mission to showcase the UK's innovative digital health sector at Hospitalar, the largest healthcare trade show in Latin America, resulting in a UK digital health supplier securing a first export win in Brazil.

LATAM Healthcare PPP Mission, London April 2017

Healthcare UK hosted an inward mission for senior healthcare leaders and government officials from Colombia, Mexico and Peru. UK specialists informed delegates of UK shared best practice to support Latin America PPP healthcare projects worth £1.5bn being launched in 2017/18.

“Healthcare UK invited Capita Healthcare Decisions to attend the Hospitalar event in Brazil in May last year as part of their delegation. In being introduced to Sharecare Brazil, we recognised their vision and goals for the industry which are perfectly aligned to our healthcare technology solutions. Adding Capita's teletriage product to Sharecare's digital health technology ecosystem has facilitated a joint working ethos to further develop our product and has forged an excellent collaborative experience. I am delighted that Healthcare UK facilitated this relationship and has continued to work with us to expand our portfolio of global customers.”

Tracey Francis, MD, Capita Healthcare Decisions

Looking Forward to 18/19

In 2018/19 Healthcare UK will continue to focus on our core objective of **Driving and Promoting Exports** in Healthcare through high value campaigns, building UK healthcare offers strategy and with additional focus on the following two objectives:

- **Addressing barriers and incentives to trade** for UK Suppliers including building capability and growing the UK supplier base
- **Supporting the Global Britain agenda** in health through the wider prosperity agenda, promoting UK PLC, bi-lateral deal generation and policy

In 2018/19, the initiatives to achieve these objectives will be:

- Launching a new High Value Campaign in the emerging market of South East Asia
- Continuing to develop bilateral approaches to deal generation particularly in the Gulf
- Building commercial opportunities and reputation for UK healthcare suppliers through the government's international aid initiative of the Prosperity Fund in Health
- Repositioning and enhancing our offers in infrastructure and education and training to maximise emerging opportunities and ideas
- Developing new offers based on demand from markets like elderly care
- Identifying longer term Overseas Direct Investment (ODI) opportunities with DIT support
- Promoting UK and exporting at key 2018/19 healthcare events at home including, NHS Expo, NHS Confederation, NHS Providers, THET annual conference and overseas at Medica and Arab Health
- Developing our capabilities and influence in Health trade policy
- Fostering innovation in UK Digital Health including looking at opening opportunities in Artificial Intelligence
- Officially launching and delivering our Export Catalyst programme to help UK suppliers build capability to be export ready



The UK's Department for International Trade (DIT) has overall responsibility for promoting UK trade across the world and attracting foreign investment to our economy. We are a specialised government body with responsibility for negotiating international trade policy, supporting business, as well as delivering an outward-looking trade diplomacy strategy.

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