

Annual Review 2019/20

(for the year ended 31 March 2020)



 **HEALTHCARE
IS
GREAT**
BRITAIN & NORTHERN IRELAND

HealthcareUK

A joint initiative between



Healthcare UK is a joint initiative of the Department for International Trade, NHS England and Improvement (NHSE/I) and the Department of Health and Social Care (DHSC). 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 Advisors located in British Embassies, High Commissions and Consulates in over 100 markets, providing tailored support to UK companies.

Contact us at:

Web: www.gov.uk/government/organisations/healthcare-uk

Email: healthcare.uk@trade.gov.uk

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Introduction

It has been a great pleasure to lead the DIT Healthcare, Life Sciences and Bio-economy Cluster over the last year. I feel a great sense of pride in the way the team has responded to the COVID-19 crisis. The whole cluster has been pivotal in working across government to secure the procurement of vitally needed equipment and medicines including paracetamol, PPE and ventilators for the NHS. The team have worked relentlessly to overcome trade barriers, developing policy and working with our teams in embassies overseas to secure supplies.

The UK is a world leader in all three sectors with a wide range of internationally renowned private, public and academic organisations. UK entities play a leading role in finding solutions to the world's biggest challenges, including climate change, food security, an ageing society and universal healthcare coverage. To support trade internationally, we position the UK as a world leader in emerging innovations and trends such as digital health, genomics, personalised medicine, AI, battery technology, precision agriculture and the transition away from plastics. We also support our sectors to prepare for the UK's exit from the European Union, maximise opportunities through future free trade agreements and assist the government to develop and implement policies as effectively as possible.

Focusing specifically on healthcare, our team achieved its export win target, but also delivered an increase in export wins compared to 2018/19. We successfully delivered an international engagement programme of 13 inward and 9 overseas missions, which included such large-scale events as NHS Expo, Confed and Arab Health. We held a range of high-level government to government meetings and engaged key regional stakeholders on both existing areas of UK strength as well as new UK offer strategies in Diagnostics, Women & Children's Health and Healthy Ageing.

The Export Catalyst has gone from strength to strength since its launch in 2018, with over 20 NHS family organisations now being supported through our multitiered programme which has enabled them to build their strategic capacity and to respond successfully to international opportunities. In combination, we are working with DHSC and NHSE&I on the development of the Export Collaborative initiative, where we continue to develop the operational, legal, and commercial plan for the programme, as well as engaging the NHS family.

We remain heavily involved in the cross-governmental Prosperity Fund "Better Health Programme" which continues to provide technical collaboration in eight lower to middle-income countries. We have drawn on the specialist capability and experience of the sector to deliver over 30 activities which has brought together an ever-growing number of overseas partners and UK suppliers.

Finally, as we move into the next, post-COVID era of global health, I am keen that we build on our experiences, continue to establish new ways of working and to pursue excellence and further international success through our diverse work.

Harjinder Kang

Director Healthcare, Life Sciences and Bioeconomy Sector Team
Department for International Trade



Introduction

The Department for International Trade (DIT) is responsible for securing UK and global prosperity by promoting and financing international trade and investment, and championing free trade. We help businesses export into global markets and help overseas companies locate and grow in the UK. We also use trade and investment to underpin the government's agenda for a Global Britain and its ambitions for prosperity, stability and security worldwide, of which healthcare is a key theme.

We have all been challenged by the COVID-19 pandemic and DIT, (in particular, Healthcare UK), adapted quickly to work across government with the NHS, Department for Healthcare and Social Care (DHSC), Foreign and Commonwealth Office (FCO) and our teams globally to tackle export barriers and to identify new sources of supply of essential medical products for the NHS.

Since the UK's departure from the EU at the end of January 2020, we have taken our independent seat at the World Trade Organization (WTO), outlined our proposed approach to negotiations with priority partners, and launched new digital services, as well as a global advertising campaign. DIT will play a key role in delivering our promise to have 80% of UK trade covered by free trade agreements within the next three years.

As Minister for Exports, I am responsible for the promotion of UK goods and services abroad including the financial arrangements that ensure UK-based companies succeed in the global economy. Export support forms a key part of the government's drive to increase productivity and growth across the country, through the new Industrial Strategy and I am delighted to see the positive impact this is already having, with UK Exports increasing by 4.8%* in 2019. I am also extremely pleased that the department directly helped UK firms win over £27 billion in export deals, and supported 1,400 individual investments in the UK**. The Healthcare sector continues to go from strength to strength - proving itself as a world leader.

Our NHS and private sector in healthcare are global leaders in digital innovation, universal healthcare coverage and pioneering new models of care. I am pleased to acknowledge the key role Healthcare UK has played in sharing this expertise overseas, in helping DIT achieve its global objectives and I very much expect the team to continue to build on this success in the future.

* <https://www.ons.gov.uk/economy/nationalaccounts/balanceofpayments/bulletins/uktrade/march2020>

** <https://workspace.trade.gov.uk/news-and-views/antonia-view-from-my-seat-19/>

Graham Stuart MP
Minister for Exports



Introduction

The NHS is admired around the globe and is widely seen as an exemplar of universal health coverage, being ranked consistently as the world's best healthcare system by US-based think tank the Commonwealth Fund^{***}. It is the third time in a row that the study, which is undertaken every three years, has found the UK to have the highest-rated health system.

^{***} <https://www.commonwealthfund.org/chart/2017/health-care-system-performance-rankings>

Due to its strong global reputation, there is high demand from international buyers who are keen to access UK expertise, experience, and innovative solutions.

Healthcare UK has been supporting NHS family organisations on their export journeys, realising benefits for UK patients, over the past seven years. They have successfully developed their support offer to UK healthcare providers during that time, including the bespoke support programme now offered through the Export Catalyst to the NHS. However, together we identified that it is time for a step change and plans are underway to broaden and deepen the support available. The NHS set out its vision in the Long Term Plan, published in January 2019, to use the support and networks of Healthcare UK to spread its innovations across the globe.

The NHS Long Term Plan highlighted the value of collaboration, pledging that:

“As UK-led innovations are proven as ‘ready for spread’ in England, we will support their global export through the work of Healthcare UK. We will also form an NHS Export Collaborative with Healthcare UK by 2021, working with selected trusts to export NHS innovations”

NHS Long Term Plan, January 2019 (ch. 3, p.77)

Leading on from this, Healthcare UK, NHS England and Improvement and Department of Health and Social Care developed the principles of the new NHS Export Collaborative, and this year have been working on its co-development with a range of stakeholders in the NHS, looking to launch the initiative by 2021. The initiative will support the NHS family to benefit from improved efficiency and economies of scale and help them to access a higher share of international business through working collaboratively.

The NHS Export Collaborative will complement, rather than replace, existing support provided by Healthcare UK, including the Export Catalyst which has successfully scaled up this year. The Export Catalyst empowers NHS organisations to build the export skills required to deliver projects successfully overseas; improving capacity and capability whilst strengthening understanding to ensure the benefits to the NHS are realised. This programme offers a range of services to enable capability development, as well as bespoke, additional, expert resource quickly and when it is needed.

Healthcare UK also helps the NHS to fulfil its important role in international health development. Through the Prosperity Fund's Better Health Programme, the UK is supporting eight middle income countries to strengthen their health systems as they progress towards achieving universal health coverage. Healthcare UK is working with the NHS to support these countries on a long term basis. The development goals set by the United Nations for 2030, underline the global role the NHS plays, and the practical ways in which it can support health system strengthening in lower and middle income countries.

Healthcare UK achieved its export win target for 2019/20. This figure comprises work covering Clinical Advisory, Education & Training, International Private Patients - with Arm's Length Bodies contributing largely through health system strengthening and landing 10 advisory projects. An impressive array of skill and experience.

We are pleased that the NHS continues its commitment to maintaining the UK's position as a global leader in healthcare.

Dr Emily Lawson

Chief Commercial Officer
NHS England & NHS Improvement



Key Achievements 2019/20



Contributing to the healthcare sector's part of DIT's overall **£27bn** export wins*



Supporting UK business and NHS in **22 countries**

Delivering export wins for a diverse range of NHS Trusts and ALBs

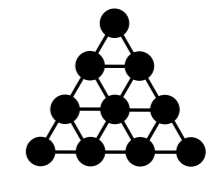
Delivered a range of export wins for academia sector



Delivered over **2000+** supplier engagement meetings

UK has the best healthcare system in the world

Commonwealth Fund
2014, 2016, 2017



Completed **13** inward missions connecting UK organisations with overseas partners



The UK Government is committed to supporting UK public and private organisations to build dynamic partnerships in healthcare across Asia Pacific. Now more than ever, strong healthcare systems are vital and the UK's world-class science and research expertise serves as a solid foundation for innovation. There are opportunities for closer cooperation with our Southeast Asian partners, and we look forward to building a more robust global health system together through mutually beneficial relationships that create better patient outcomes.



Natalie Black CBE, Her Majesty's Trade Commissioner, Asia Pacific



Completed **9** successful outward trade missions to China, Middle East, South East Asia, and India

* <https://www.gov.uk/government/publications/statistics-on-dit-export-support-objectives-2019-to-2020/statistics-on-dit-export-support-objectives-2019-to-2020>

Healthcare UK responding to the COVID-19 crisis

Healthcare UK rose to the global challenge posed by COVID-19 at the end of 2019/20. Healthcare UK worked with teams across DIT and wider government provide support to the UK Healthcare sector and the wider UK response to the crisis.

This included:

- Leading responses to over 800+ enquiries for requests for support from UK business and overseas partners, as well as offers from both for supporting the UK response to COVID-19
- Working with DHSC and FCO as part of the Global Strategic Sourcing and Engagement Project (GSSEP) on sourcing and identifying new suppliers of critical medical equipment in international markets
- Working with DHSC and leading on issuing over 600+ PPE Export Controls authorisations for UK companies
- Working with wider DIT teams and the NHS Supply chain on unblocking barriers of crucial medical products heading for the UK from overseas
- Working with other governmental departments to facilitate international COVID-19 science and innovation opportunities
- Development of a UK Digital Health COVID-19 not for profit offer. This features over 30+ leading UK companies which we are promoting around the world to support other health systems

We are continuing our work in support of the UK COVID-19 crisis, as well as finding opportunities to help our overseas partners.

“ The India-UK Partnership was strengthened during the COVID-19 pandemic as DIT colleagues in India and the UK worked together with the Indian Government to ensure critical supplies of drugs and PPE reach the UK, totalling: 3 million packets of Paracetamol; 21.2 million tablets of Hydroxychloroquine; over 2,000 metric tonnes of Paracetamol-related and other essential pharmaceutical ingredients; and 10.95 million face masks. The UK and India are perfect healthcare partners and have opportunities for increased collaboration in vaccine development and distribution; the production of key medicines; PPE manufacturing to international standards; and fully digitally-enabled healthcare systems.

Alan Gemmell
HM Trade Commissioner South Asia

”

“ Turkey embraced the UK experience of PPP (Public Private Partnership) Healthcare projects and delivered on a vast scale – building new 2,000 to 5,000 bed City Hospital Projects across the country. Turkish companies have since become a dominant player in global healthcare infrastructure projects, opening up UK partnership opportunities. The recent signing of a MoU with the Turkish Ministry of Health has further increased collaboration and partnership opportunities. Covid-19 has demonstrated how well the DIT team in Turkey and HCUK can work under unusual circumstances, meeting urgent NHS PPE requirements, and identifying credible alternatives for long term supply. The scope and vibrancy of the Turkish healthcare sector has made a lasting impression. As we look ahead, life sciences, health tourism and digital healthcare are all flourishing in Turkey, and areas in which the UK has much to offer. We look forward to continuing our broad-ranging relationship with HCUK.

Judith Slater
HM Trade Commissioner EECAN
Eastern Europe and Central Asia



“ As an organisation, HCA has benefitted enormously from working with the Department for International Trade in terms of support to expand into new locations in the UK and networking for our existing operations. Throughout the recent pandemic peak, as we partnered with the NHS to deliver complex surgeries to patients whose treatment couldn't wait, DIT facilitated engagement with EU based suppliers of PPE on behalf of our purchasing arm, Health Trust Europe. Our International Services Group has also benefited from accessing UK and in-country knowledge to deliver healthcare to overseas patients who are seeking high-quality care.

Rebecca Pullen, Corporate Affairs Director,
HCA Healthcare UK

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 three 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, Chair, NHS Digital

Daljit Lally, Chief Executive, Northumberland County Council, Northumbria Healthcare NHS Foundation Trust

Harjinder Kang, Director Healthcare, Life Sciences and Bioeconomy Sector Team

Ian Crichton, CEO, Servelec

Ian Dodge, National Director – Strategy & Innovation, NHS England and Improvement (NHSE/I)

Lord Kakkar, UK Business Ambassador for Healthcare and Life Sciences, DIT

Keith Davies, Managing Director, i5 Health

Matt Sowrey, Deputy Head, Healthcare UK

Dr Mike Short, Chief Scientific Adviser, DIT

Natalie Bain, Deputy Head, Healthcare UK

Niall Dickson, CEO, NHS Confederation

Peter Ellingworth, CEO, ABHI

Richard Cantlay, Global Head of Healthcare Facilities, Mott MacDonald

Richard Stubbs, CEO, Yorkshire and Humber AHSN

Roger Spencer, CEO, The Christie Foundation NHS Trust

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

Steve Oldfield, Chief Commercial Officer, Department of Health and Social Care

“

Without HCUK, our partnership-based Local Authority/NHS organisation would not have regular, direct access or support to international opportunities of relevance. For us, this is where the core NHS standards of patient centricity, kind, compassionate, safe, and well governed care are what the clients wish to emulate in their service - albeit in their local context. Most of our business pipeline has come from HCUK and is supported by them, often through multiple years. Working commercially internationally is not without challenges, some of which HCUK can and has helped with. However, there is so much more to gain than the profitable financial income from supporting international customers delivering care to NHS standards. For us we have seen huge personal development of staff, great pride in the local offer having international relevance, and mutual learning - we have brought many ideas back to our practice in the UK.”

Daljit Lally, Chief Executive, Northumberland County Council, Northumbria Healthcare NHS Foundation Trust

“

Healthcare UK provides a critical forum for discussion by senior stakeholders across government, the NHS and industry which enables both oversight of policy and the development of activity to benefit the UK economy.”

Peter Ellingworth, CEO ABHI

“

Sharing internationally the expertise of the NHS, is critical to emerging nations, the patient and the income from working internationally that can help fund improvement within the NHS itself.

Keith Davies, Managing Director, i5 Health

“

The Christie has an international reputation for the highest quality cancer care, research, innovation and teaching and a long-standing international network of former staff, patients and supporters. Working with HCUK gives us that added edge of understanding local priorities and opening doors to business opportunities across the globe.”

Roger Spencer, CEO The Christie NHS Foundation Trust

“

There has never been a more important time for the world to work together, share innovation and improve health around the globe. Healthcare UK enables the NHS to engage internationally where its expertise is most needed, as well as supporting the growth of our world-class health and life sciences sector.”

Richard Stubbs – CEO Yorkshire and Humber Academic Health Science Network



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

In 2019/2020, we focused our activities on 16 priority markets:

Priority markets are determined with those with a high propensity to export and successive year on year exports and also looking at emerging markets.

- China
- India
- Egypt
- Kenya
- South Africa
- Saudi Arabia
- UAE
- Qatar
- Bahrain
- Oman
- Kuwait
- Indonesia
- Malaysia
- Philippines
- Singapore
- Vietnam

We concentrated on five aspects of healthcare where there is growing international demand:



Education & Training



Clinical Services



Healthcare Systems Development



Digital Health



Infrastructure



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 /Improvement](#)

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

Since we were founded in 2013, we have supported UK export deals in over 25 countries.

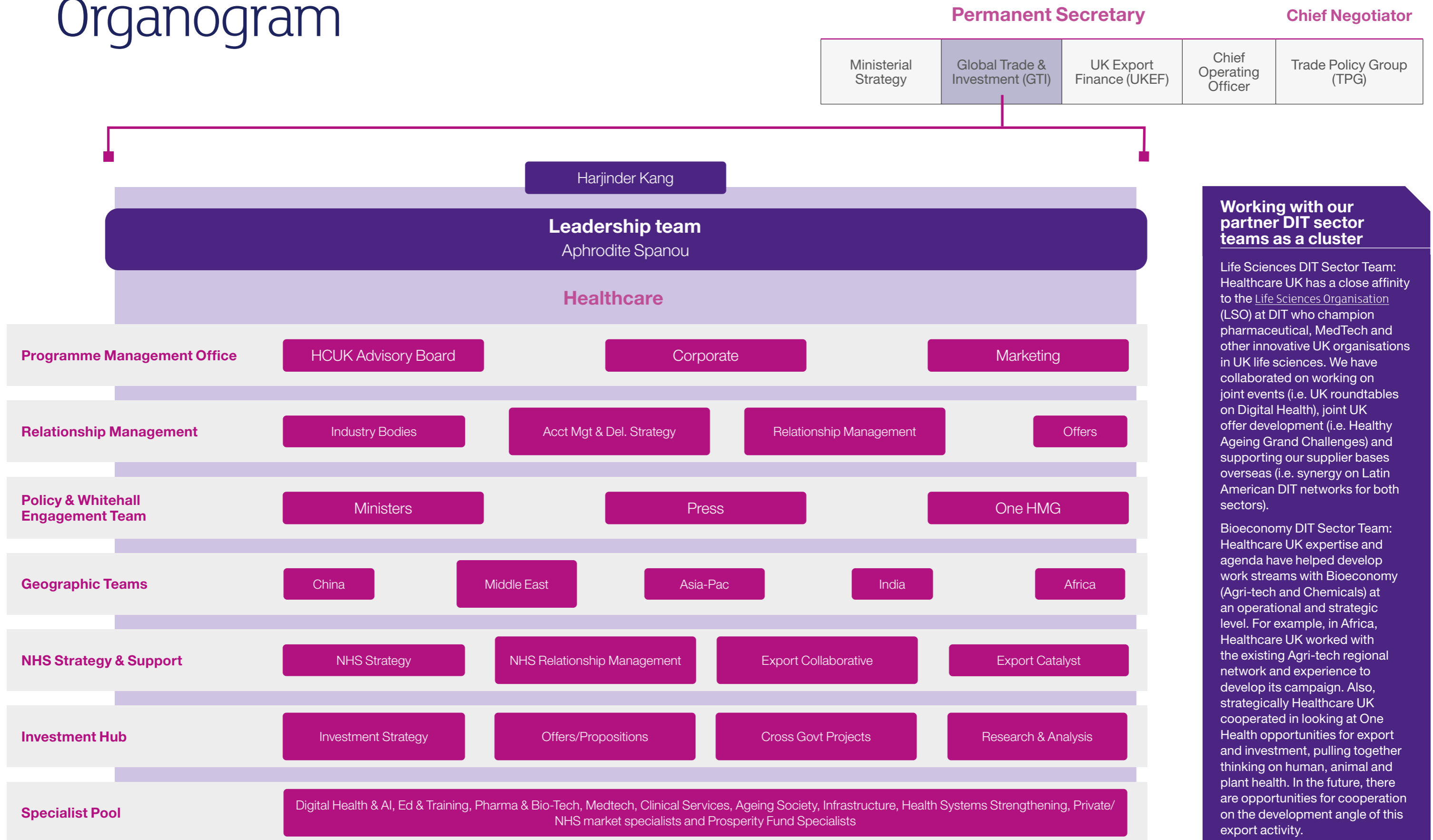


The next decade will see huge investment in healthcare systems around the world – in low to middle income countries this will be to establish much needed healthcare systems. Healthcare UK will play a pivotal role both in terms of identifying commercial opportunities and facilitating the UK response to these opportunities.



Richard Cantlay, Global Head of Healthcare Facilities, Mott MacDonald

Organogram



Working with our partner DIT sector teams as a cluster

Life Sciences DIT Sector Team: Healthcare UK has a close affinity to the [Life Sciences Organisation \(LSO\)](#) at DIT who champion pharmaceutical, MedTech and other innovative UK organisations in UK life sciences. We have collaborated on working on joint events (i.e. UK roundtables on Digital Health), joint UK offer development (i.e. Healthy Ageing Grand Challenges) and supporting our supplier bases overseas (i.e. synergy on Latin American DIT networks for both sectors).

Bioeconomy DIT Sector Team: Healthcare UK expertise and agenda have helped develop work streams with Bioeconomy (Agri-tech and Chemicals) at an operational and strategic level. For example, in Africa, Healthcare UK worked with the existing Agri-tech regional network and experience to develop its campaign. Also, strategically Healthcare UK cooperated in looking at One Health opportunities for export and investment, pulling together thinking on human, animal and plant health. In the future, there are opportunities for cooperation on the development angle of this export activity.

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:

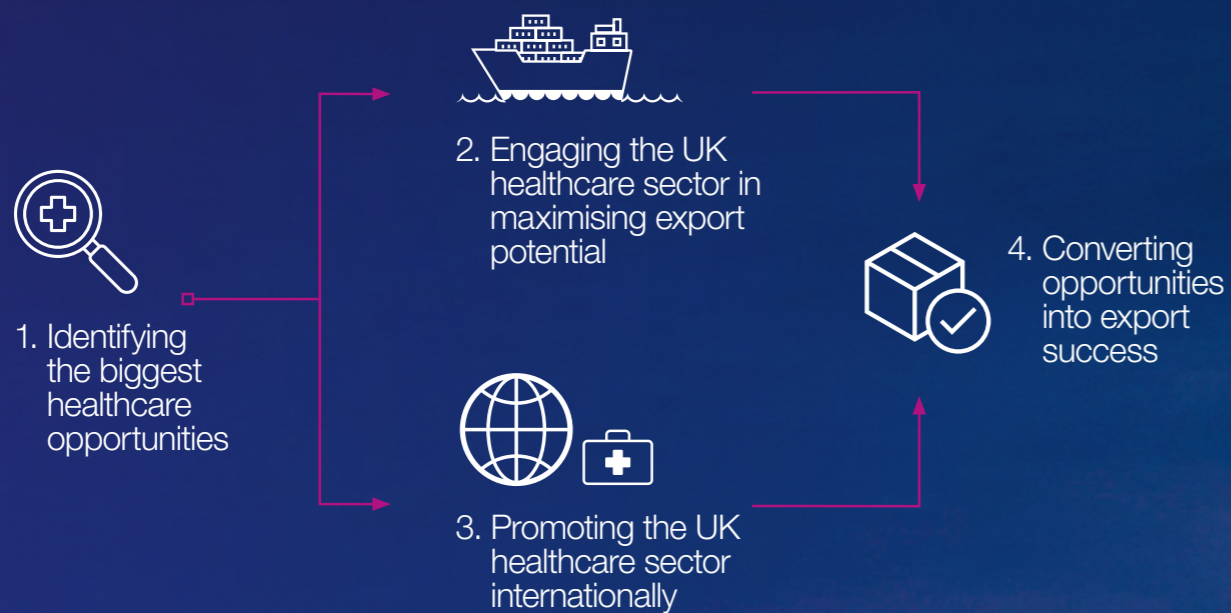
raising awareness of the vast range of export opportunities to suppliers and developing the capability of public sector healthcare organisations to respond to international demand for their expertise

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



1. Identifying the biggest healthcare opportunities

Year on year growth in export wins

- £3-7bn potential contract value annually for the UK healthcare sector over the next 10 years
- Five geographical campaigns
- Suite of 16 UK Healthcare Offers and supporting strategies

Healthcare UK focused on a diverse portfolio of five key High Value Campaigns in 2019/20. These were selected based on the size and scale of the opportunities and openness and receptiveness of UK suppliers to doing business in each market.

This year we continued our existing campaigns in China, India, South East Asia and Middle East, and launched a new campaign in Africa.

Through our extensive network of DIT contacts across embassies, high commissions and consulates, we identified a diverse range of qualified lead opportunities. All these markets are undergoing healthcare challenges and are seeking

UK expertise. We used our in-market experience to identify key areas of need and demand across health economies and systems in these markets and to connect them with suitable UK suppliers.

Additionally, we have now developed a portfolio of 16 healthcare offers summarising and demonstrating the UK strengths and potential suppliers in healthcare. This includes development of three new offers in Diagnostics, Women & Children's Services and Healthy Ageing, as well as refreshing and building out our UK digital offer with over 100 companies featured.

We also continue to gain advice from our experts, including our HCUK Advisory Board and the Department for Health and Social Care and NHS England boards. We engage with our networks of experts in DIT, including our Sector Specialists, International Trade Advisors (ITAs) and UK-based Regional Trade Teams. This also includes exploring opportunities with UK Export Finance for UK healthcare.

Finally, we have also developed new routes to market including trade and development with the Prosperity Fund Better Health Programme with our partners in the FCO and NHS, and exploring Aid Funded Business working with the non-profit sector.

New Policy Team

In 2019/20, a new Policy Team was established to support Healthcare UK. The intention was to link the sector more closely to the policy decisions that affect it, including connecting with policy teams across government and with international trade policy within DIT.

This function was developed at a crucial time for significant shifts in trade policy, including the UK's exit from the European Union, and the negotiation of new trade agreements as the UK becomes an independent trade partner.

It ensures that the trade and investment interests of the healthcare services industry are considered in these shifts, as well as supporting the sector to adapt with timely information and troubleshooting on new policy positions. The team has also boosted the ability of DIT to work in closer partnership with other government departments and arm's-length bodies, through bilateral relationships and cross-government policy governance structures.

2. Engaging the UK healthcare sector in maximising export potential

- Delivered over 2,000 supplier engagement meetings across DIT network in 2019/20
- 1,500+ total UK healthcare suppliers in our network
- Export Catalyst client-base of 19 NHS family organisations
- Export Catalyst average rating of 8/10 for consultancy and 9/10 for academy

We have continued to develop strong relationships with UK healthcare organisations and delivered valuable DIT services to support their export journeys.

Our **Relationship Management team and wider DIT network in regions** have delivered over 2,000 supplier engagement meetings. This includes promoting exporting, giving advice and matching them with potential buyers. A third of these have been with the NHS and arms-length bodies. We have also expanded our supplier network to over 1,500 UK healthcare suppliers.

[The Export Catalyst](#) was launched in 2018 to provide support to NHS family organisations on their export journey to build their capability

and capacity to succeed. In 2019/20, the programme has now become established and successfully grown its client base, providing highly valued support to a total of 20 clients.

In 2019, we supported the development of the [NHS Long Term Plan](#) pledge to create a new initiative to provide a 'front door' for NHS family organisations. We have been working with our partners in DHSC and NHSE/I to launch this **NHS Export Collaborative**. This initiative will look to grow and coordinate NHS international commercial engagement, and for other countries wishing to access its extensive expertise.

We again raised the profile and appeal of exporting for UK healthcare organisations at **NHS Expo 2019**. Through the event's interactive exhibition stand, sessions and reception, the team engaged with over 5,000 attendees from the UK. This included multiple overseas delegates from Europe, China, South Africa, Egypt, Mexico and Myanmar hosted by the UK government.

Additionally, we established a new policy team to link the sector to trade policy and increase our **cross-Whitehall engagement**. Our team has represented DIT and fostered collaboration on wider HMG objectives such as the Global Health Oversight Group, PHE Global Health Committee and wider bilateral forums such as JETCOs.

Finally, Healthcare UK rose to the **global challenge posed by COVID-19** at the end of 2019/20. Healthcare UK colleagues worked with colleagues across DIT to provide support to the UK healthcare sector and the wider UK response to the crisis.

3. Promoting the UK healthcare sector internationally

- Completed 13 successful inward trade missions

- Completed nine successful outward trade missions

Healthcare UK participated in or managed over 35 high-level activities and events in the UK and overseas 2019/20. These included ministerial visits, inward visits, outward missions, and exhibition conferences to promote UK export in healthcare. We also exceeded our export win target for 2019/20.

In India, we identified over 150 opportunities including government tenders and philanthropic institutions and exceeded our target, including key wins for the NHS. We also delivered a Artificial Intelligence mission led by Lord Prior, Chairman of NHS England, with 15 organisations and with 80 leads generated. Finally, The **Healthcare Artificial Intelligence Catalyst (HAIC)** was set up by Healthcare UK with the Government of India to address the shortage of healthcare professionals through Artificial Intelligence.

In China, we continued to focus on matching UK expertise to the growing demand and the Health China 2030 policies. This included a **China Digital Health Mission and China Oncology Mission**. The former showcased NHS and private sector to national forums in Shanghai, Chengdu and Wuxi, focusing on hot topics such as artificial intelligence and digital integrated primary care. The latter involved 14 keynote speeches, six panels and three sessions of business matching across four cities.

In Africa, we built a solid foundation for the new campaign with activities in Egypt, establishing an MOU to train medical professionals with NHS

practitioners to delivering panel discussions at the South African Digital Health Conference 2019 with key stakeholders. Additionally, Healthcare was one of the UK sectors showcased at the inaugural **UK Africa Investment Summit**.

In the Middle East, an ambitious target was exceeded focusing on digital health, healthcare systems and clinical services. There was a successful mission to Saudi Arabia with 14 organisations showcasing primary care, digital health, and non-communicable diseases. Furthermore, Healthcare UK delivered a wide-ranging programme of activities at **Arab Health 2020** showcasing UK expertise, including an Embassy Reception, seminars on Value-based Healthcare, the Saudi Healthcare Transformation, Education & Training and Market Opportunities in the Middle East.

In South East Asia, we strengthened our campaign for its second year, exceeding our target for 2019/20. The campaign built a pipeline focusing on clinical services, digital health and education and training. We worked on Government-to-Government partnerships on how the UK experience can help on extending universal healthcare coverage. Moreover, we delivered two key missions to **HI.TEC Singapore and Digital Mission to Vietnam and Indonesia**, both promoting UK digital excellence to Ministries of Health and wider local influencers.

Although not a priority campaign, we also engaged in activities in Latin America such as Hospitalar 2019 in Brazil and a series of UK round-tables with businesses led by our LATAC DIT colleagues. Finally, we have been harnessing marketing campaigns. This includes GREAT, our own “Hospital of the Future” campaign and the **Grand Challenges** set out in the UK Industrial Strategy, particularly Healthy Ageing, to promote UK expertise in this emerging global issue.

4. Converting opportunities into export success

- Delivered export wins for the UK healthcare sector

We have supported export wins by continuing to help UK healthcare businesses to grow into global markets since 2013.

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 helped to increase NHS exports, supporting a more diverse range of the NHS family to win deals overseas.

In terms of trends we have seen infrastructure wins contributing the most, and significant growth in digital health. Clinical services and health systems are also strong sub-sectors, while more NHS organisations are also participating in education and training projects.

Middle East, India and China remain strong markets for demand for healthcare services and where our long term activity is based, including NHS projects. However, we are building the pipeline for the UK in South East Asia and Africa as emerging markets and have already seen success here in the last two years.

An export win record is created using a digital framework which registers information entered by a lead officer from the DIT network. Lead officers are responsible for the quality and accuracy of the data they enter. Once the win has been entered, the UK customer which received support in exporting is required to confirm the win through a separate online form. A win counts once it has been confirmed by the customer and this must be done within 12 months of the company winning the deal.

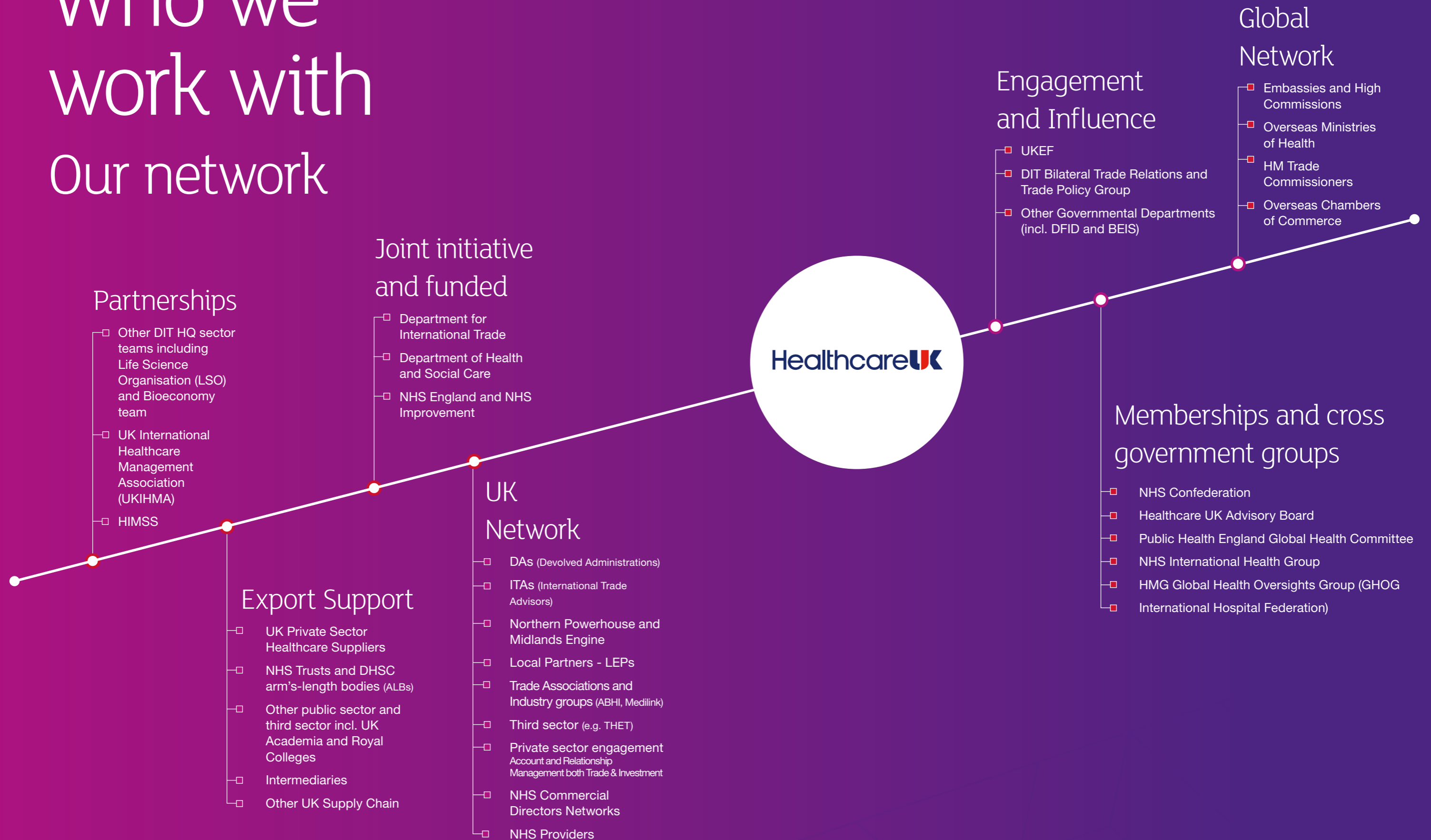
HVC

Middle East
Southeast Asia
China
India
Africa



Who we work with

Our network



Why the UK?

The global market for healthcare services is growing as governments deliver more healthcare capacity and quality to their populations. Global health care spending expected to rise at a CAGR of 5 percent in 2019-23* a year and recent research estimates that there is a winnable contract value between £3-7bn annually for the UK over the next 10 years**.

* <https://www2.deloitte.com/global/en/pages/life-sciences-and-healthcare/articles/global-health-care-sector-outlook.html>

** Healthcare UK research 2017

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)

Working with NHS Innovation Accelerator

Healthcare UK has been working closely with our colleagues in the NHS Innovation Accelerator to ensure that the NHS has access to some of the world's leading innovation. Through our network of overseas Embassies across the globe, we publicised the NIA's call for fellows for the year 2020, garnering significant interest from a range of stakeholders with innovations to be accelerated across the NHS



Healthcare UK's 5 core offers:

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 | g. Elderly care |
| b. Diabetes | h. Urgent and emergency care |
| c. Integrated care | i. Cardiology |
| d. Primary care | j. Mental health |
| e. Fertility | k. Women and children's |
| f. Genomics | |



Healthcare infrastructure services

We have the experience and expertise to deliver whole solutions for overseas partners, tailored to their needs. Healthcare UK helps pull together the support and skills of the UK supply chain, the NHS and UK Government Departments to make it easier for procurers to buy an integrated solution, and one which meets the requirements of UK Export Finance so that they can benefit from significantly cheaper loans.



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:

- | | |
|--|-----------------------------------|
| a. Data analytics | d. Telehealth and telecare |
| b. National digital health systems and infrastructure | e. Artificial intelligence |
| c. Electronic health records | |



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 offer:

- a. Multidisciplinary clinical education and training**
- b. Healthcare leadership and management training**
- c. Consultancy and advisory services**
- d. Bespoke education and training**

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



Health systems strengthening

The UK is working with international partners to strengthen their health systems, through our extensive health ecosystem of the NHS, Academic Health Science Centres and Networks, regulators, and Universities. The UK offers a range of support, primarily to middle income countries health systems as they journey towards Universal Healthcare Coverage (UHC), including:

- a. Policy and strategy**
- b. Financial incentives and regulation**
- c. Innovation and research**
- d. Workforce development**
- e. Public health and promotion**
- f. Clinical protocols and patient safety**
- g. Environmental sustainability**

Highlights of 2019/20 Offers activity

- Development of three new offers: Diagnostics, Women & Children's Services, Healthy Ageing (Trade and Investment), and Investment Offer
- Health Systems Strengthening offer scoped in consultation with NHS and ALBs, and in development
- New approach to Infrastructure, focusing on working with third market lead contractors and UKEF, and including an extensive mapping of the UK supply chain. Healthcare UK has worked to establish and deepen relationships with UKEF, lead contractors and the UK supply chain
- New approach to Education and Training offer development, with a Nursing Education sub-offer in development and exploring a more coordinated approach across Royal Colleges
- A new UK digital health offer, for overseas buyers
- New approach to identifying priority offers and sub-offers – not only matching UK expertise to overseas demand, but also identifying future need, based on market insights, and working with overseas partners to better shape demand
- Existing offers and sub-offers continue to be reviewed and updated, to best reflect the UK's current expertise and experience

New Offers developed in 2019/20

Diagnostics: This is a joint offer between Healthcare UK and DIT's Life Sciences Organisation, centred on the Diagnostics 'AI Revolution', encompassing:

- Services
- AI, Digital & Data
- Diagnostic Equipment
- Patient Focused Solutions
- Design, Conceptual & Consultancy
- Research & Development
- Education & Training

Women and Children's Services: This offer was developed in response to the rising trends and demand for UK excellence across the globe, and particularly China. The UK is home to some of the world's leading women and children's hospitals, including Great Ormond Street Children's Hospital and Liverpool Women's Hospital. Furthermore, the regulatory environment allows innovation to flourish whilst ensuring safe and effective care, particularly within areas such as Fertility and Paediatrics. This offer includes:

- Obstetrics & Gynaecology
- Fertility
- Antenatal care
- Perinatal care
- Postnatal care
- Neonatology
- Paediatrics

Healthy Ageing Trade and Investment: Healthcare UK has played a leading role in the trade and investment response to the Ageing Society Grand Challenge of the Industrial Strategy, with one of our specialists being the DIT Ambassador for the programme. A working group has been established, with dedicated resource focused on Europe and input from China and Japan Geo Teams. This group has worked with colleagues across Government, including BEIS, DHSC, Innovate UK and other DIT sectors, to develop the international offer and events for Healthy Ageing.



Healthcare UK as a part of DIT has been an invaluable source of market knowledge, and a key facilitator for building networks across countries as well as industries. They have certainly proven their worth to our business by establishing links to local healthcare hubs in the UK, thus promoting professional connections and knowledge transfer.

Roberto Marconi,
Senior Hospital Manager, VAMED



Digital Health Malaysia (DHM) has been extremely lucky to have collaborated with Healthcare UK and DIT. Both have been consistent in their support of the DHM conference since 2016, facilitating engagement with many eminent stakeholders in digital health such as Professor Richard Luxton, Professor Lars Sunstrom, Miss Elizabeth Dymond and Mr Hassan Chaudhury. Their presence has enriched the DHM conferences and digital landscape in Malaysia in many ways. For example, these engagements have led to the 6th International Conference on Bio-Sensing Technology being held in Malaysia in 2019 and the latest engagement with Mr Chaudhury has laid the groundwork for further collaboration with Healthcare UK in setting up an academy with NHS Digital Academy in Malaysia. DHM believes these will be the start of many global collaborations"

Professor Dr. Chee Piau Wong, President,
Pro Tem Committee, Digital Health Malaysia



Working with UKEF

Healthcare UK are working closely with UKEF (UK Export Finance) in supporting Prime Contractors constructing hospitals internationally to engage the UK Supply Chain around Medical Equipment. They have had success in Africa recently on this and during these conversations we also raise the options of Digital Health and Education and Training.

When UKEF supports an opportunity they require the Prime Contractor to deliver a minimum of 20% UK Supplier content. With UK supply chain mapping, and engagement with the wider DIT network, Healthcare UK are well placed to support helping organisations grow their export of products and services to markets that they may not have considered previously through this. This includes additional benefit of UKEF supported opportunities guaranteed payment to UK suppliers.



Responding to worldwide healthcare trends...

Universal Healthcare Coverage (UHC):

- The UK is working to support the UN's 2030 goal of UHC. By developing a collaborative approach with governments to achieve their UHC ambitions, Healthcare UK is supporting countries to identify priorities and provide a whole-NHS approach through the Health Systems Strengthening offer.

Non-Communicable Disease (NCD):

- NCD remains the leading cause of premature death and disability in the world today, and in 2018 accounted for over 70% of all deaths globally. Each year, 15 million people die from an NCD between the ages of 30 and 69 years; over 85% of these 'premature' deaths occur in low- and middle-income countries*. Cardiovascular disease, common cancers, respiratory disease, and diabetes account for 80% of these deaths, many of which are because of tobacco use, physical inactivity, the harmful use of alcohol and unhealthy diets. These behaviours all increase the risk of dying from an NCD. Drawn from evidence, the UK has introduced several policies designed to counter these causes, through taxation and regulation, along with targeted support programmes, for example the Diabetes Prevention Programme and smoking cessation initiatives. From this experience of implementing a broad approach covering policy, prevention and treatment, the UK is well positioned to offer expertise, learning and hands-on support to respond to NCD challenges faced by healthcare systems around the world.

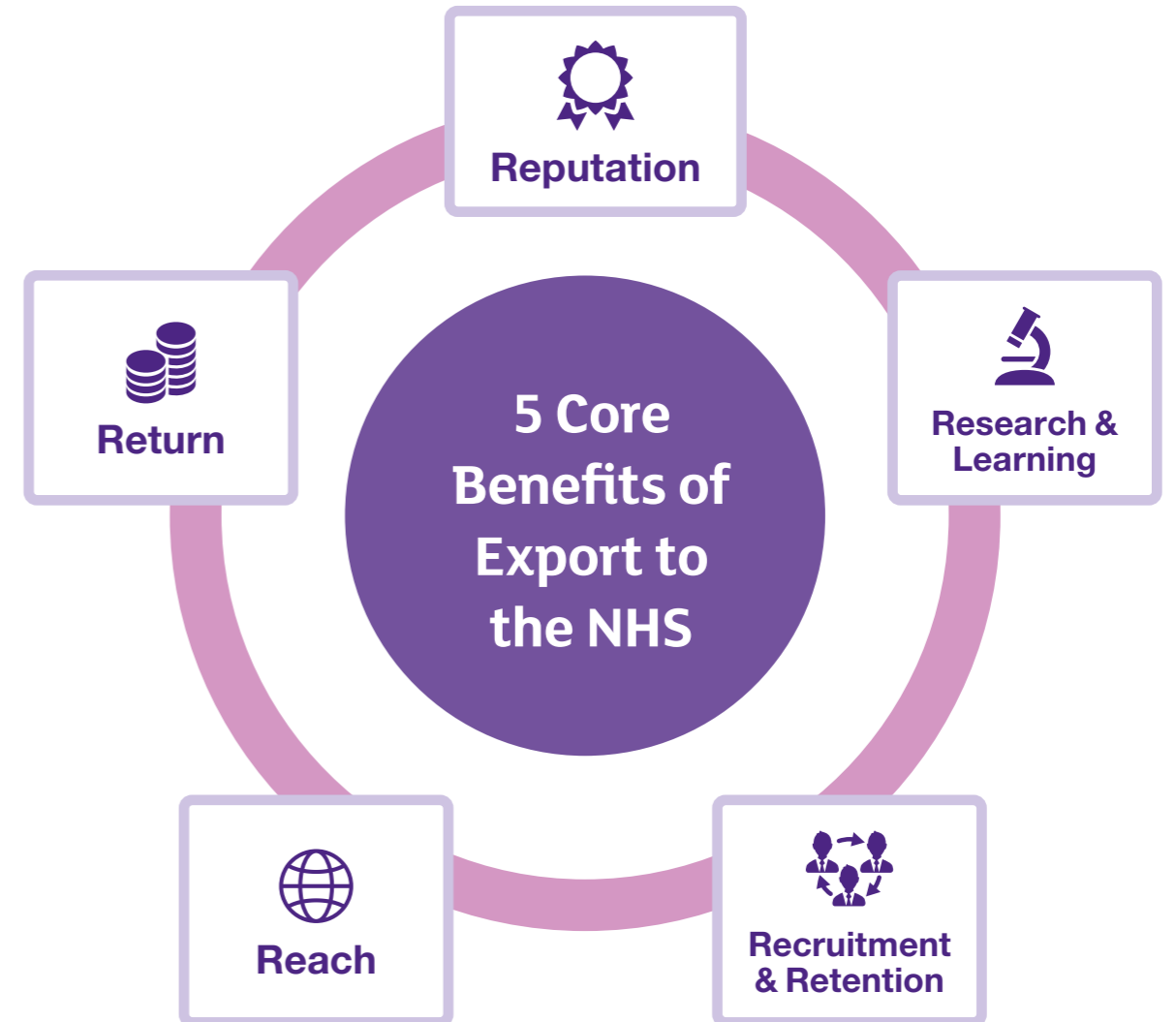
* https://www.who.int/topics/noncommunicable_diseases/factsheets/en/

Importance of the NHS to Healthcare UK

One of Healthcare UK's core remits is to support the NHS to grow its international commercial activity, through developing NHS family organisations' capability and capacity to engage in export opportunities, sustainably. We have worked with a broad range of NHS family organisations over the years and, although each organisation will have its own reasons for engaging in international activity, together we have identified five core benefits:

- **Reputation:** international activity enhances the global reputation of the NHS.
- **Research and learning:** experience in providing services for overseas patients and populations can also improve the delivery of services to diverse patients within the UK. Staff can learn a lot from overseas work and more formal research partnerships can contribute to breakthroughs in healthcare delivery.
- **Recruitment and retention:** operating internationally will give the NHS a larger footprint in the global health labour market, increasing the availability of highly trained staff and bringing benefits to both the UK and partner institutions. Offering staff the potential for overseas experience also aids staff recruitment and retention within the UK's competitive labour market.
- **Reach:** the NHS is one of the best health systems in the world. Sharing expertise internationally ensures that a greater number of people benefit from access to world-class healthcare and means that the values and quality associated with the NHS have a global reach.
- **Return:** income generated from international sources can alleviate pressure on budgets and be reinvested in innovation and improvement within the UK. This will improve the quality of domestic services and ensure that the NHS continues to be a world leader in the future.

Healthcare UK works with NHS family organisations to enable them to maximise the benefits they can realise from international commercial activity, whether they are just starting their export journey or have a well-established reputation overseas. We do this through several programmes and initiatives, including the Export Catalyst, Export Collaborative, Better Health Programme (as part of the Prosperity Fund) and NHS Regional Commercial Directors Network.



NHS Regional Commercial Directors Network

Working with NHS England and Improvement, Healthcare UK has supported the setting up of a regional network of NHS commercial leads, drawn principally from NHS Trusts and Academic Health Science Networks. However, attendance is increasingly drawn from other parts of the NHS ecosystem – including Universities and arm's-length bodies. The aim is to increase awareness of international opportunities, whether commercial, research and development, or bilateral engagements. All parts of England are covered with the aim that the Networks become locally owned.

Export Catalyst

The Export Catalyst was launched in September 2018, to provide more support to NHS family organisations on their export journey, specifically around capability and capacity. In 2019/20, the programme has become established and successfully grown its client base, providing highly valued support to a total of 19 clients.

The Export Catalyst is a multitiered service programme, tailored to the needs of NHS organisations and Department of Health and Social Care arm's-length bodies. Its primary aim is to help these organisations strengthen their expertise to develop a comprehensive and robust international strategy, as well as their ability to respond to international opportunities and deliver sustainably at scale. The programme is made up of several different elements, some delivered at no charge, whilst other, more tailored, elements are delivered on a cost recovery basis, in line with Her Majesty's Government directives.

Export Consultancy

This specialist, bespoke consultancy service offers additional, expert resource to improve capability as well as provide extra capacity and hands-on help quickly when it is needed. From developing an international strategy or helping to identify a clear value proposition which is aligned with market demand and need, to pricing services and assessing risk, the Export Catalyst helps to ensure organisations can respond to opportunities and grow overseas experience that is scalable and sustainable.

The Export Catalyst currently offers five export consultancy products, which can be delivered in line with the organisation's need:

- Export readiness diagnostic
- Proposition development
- Market selection
- Pricing
- International strategy

Our consultants have specialised commercial and exporting skills, successful commercial and international industry experience across the public and private sectors and are experts in their fields with backgrounds in healthcare and international operations, within the NHS and wider healthcare market.

Export Catalyst consultancy products received average feedback scores of **8/10**, and **Export Academy** sessions received **9/10**, demonstrating that both are valued services to our clients

In 2019/20, we delivered a range of export consultancy products to clients, including:

Full International Strategy Development, delivered through several sessions, to Alder Hey Children's NHS Foundation Trust

“ Informative and stimulating session. It was all excellent, the trainers were generous with their knowledge and experience. ”

Alder Hey Children's NHS Foundation Trust

An Export Readiness Diagnostic session to Cambridge University Hospitals NHS Foundation Trust

“ The Export Readiness Diagnostic session I attended at CUH allowed me the opportunity to hear from the experts, and the day gave me the opportunity to network and share ideas with my colleagues and the Export Catalyst team. The ongoing contact, advice and support from our Key Account Manager has been most valuable. ”

Cambridge University Hospitals NHS Foundation Trust

Proposition Confirmation and Market Selection sessions to a King's College Hospital NHS Foundation Trust

“ After working with the Export Catalyst team, our international strategy has put us in a much better position to both win new international business and be better prepared to evaluate opportunities. We are still early in our journey post-engagement, but having a strategy is the most important step in being better prepared. ”

King's Commercial at King's College Hospital NHS Foundation Trust



The Export Catalyst...

- is now an established programme, offering a professional, branded high quality service.
- has a client-base of 19 NHS family organisations, from NHS Trusts and Foundation Trusts (including General Acute, Mental Health and Specialist Trusts), to Commissioning Support Units, GP Partnerships, Royal Colleges and NHSE/I teams
- continues to broaden its product range and is in the process of developing an additional three export consultancy products, based on feedback from Export Catalyst clients
- has developed, tested, and launched the Export Academy
- has developed the Export Catalyst website (due for launch in 2020/21), which will host the Export Library, MentorNET and Market Map

Export Academy

In 2019, we launched the Export Academy, which provides individuals from NHS family organisations the opportunity to attend one-day workshops, focusing on key areas within exporting. This is an effective way of undertaking training with NHS peers, enabling shared learning and relationship building around commercial work.

Export Academy workshops focus on the challenges that NHS family organisations face during their export journey and develop foundation level skills to start thinking about how to export successfully and sustainably. They address some of the key skills gaps often found within the public sector and enable delegates to:

- Obtain a big picture overview of the key capabilities needed to be successful in international export
- Understand their organisation’s export readiness and key next steps required
- Get answers to questions and learn from our experts
- Access key tools for building export capability within their organisation and participate in exercises on how best to use them

In 2019/20 Export Academy sessions were successfully delivered to six clients, with excellent feedback and an average feedback score of 9/10.

“Initially I found exporting a confusing and daunting area to get into. As an organisation, we felt very underprepared in this region. After the Export Academy workshop, I feel much more likely to pursue exporting. It was a really helpful session with lots to learn and, as I found out, there is plenty of support available. It is good to have time to consider our options before discussing future works with the Export Catalyst.”

Head of Business Development, Royal United Hospitals Bath NHS Foundation Trust

“We are very excited to engage with Healthcare UK to develop future partnerships on our exporting strategy... I found the materials and the discussion informative and worthwhile as it has increased our confidence in exporting... Healthcare UK has helped provide the tools to understand our value proposition better when reviewing our market position and launch of new services.”

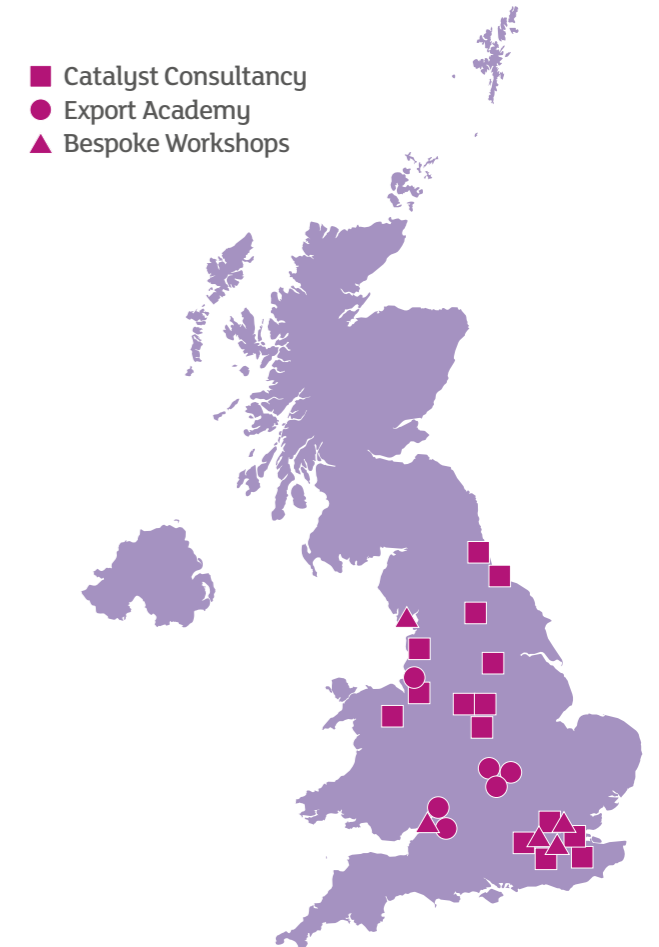
All Wales Medical Genomics Service, Cardiff and Vale University Health Board



Website

The Export Catalyst website has been developed during the year and will be launched in 2020/21. The website will host additional resources such as:

- **The Export Library** which will provide generic templates for a variety of documents for Export Catalyst members to download and use.
- **MentorNET** which will be a mentoring network, supporting organisations to learn from the experiences of others, providing essential peer-to-peer support and channels through which to discuss opportunities, challenges, and approaches. This network will also offer the opportunity to strengthen links across the UK healthcare sector, helping NHS family organisations and DHSC arm’s-length bodies to find UK export partners, spreading both expertise and risk.
- **Market Map** which will offer top level information on each of the Healthcare UK priority markets, and provide international healthcare trade insights to support organisations through their market selection process.



In 2019/20, we delivered:

- 19 export consultancy products to 10 clients
- Export Academy sessions to 6 clients
- 5 bespoke workshops

Plans for 2021/22

- Focus on working more closely with existing clients, while continuing to build our client base
- Officially launch the website, MentorNET and online resource library
- Develop a marketing strategy and partnership strategy
- Develop and test new products and approaches in line with client needs and demands
- Further develop the Export Academy
- Work closely with our sister programme – Export Collaborative

Export Collaborative

Many NHS organisations offer advice, training, and clinical services internationally. However, this activity can be reactive, consisting of individual organisations responding to specific opportunities. In 2019, the [NHS Long Term Plan](#) pledged the creation of a new initiative to provide a ‘front door’ for NHS family organisations looking to grow and coordinate their international commercial engagement, and for other countries wishing to access the NHS’s extensive expertise.

The ambition behind the Export Collaborative is to markedly increase the benefit the NHS receives from overseas commercial work by bringing together multiple UK organisations, validating overseas opportunities, brokering deals, and potentially acting as a prime contracting body where needed.

We believe that by convening specialists from across the system, the NHS will be more successful in winning and delivering ambitious international projects, which will:

1. **help improve the lives of more people, especially as a growing number of countries transition to universal healthcare coverage**
2. **make it easier to share knowledge generated by these projects**
3. **capture a greater proportion of income that can be re-invested into domestic NHS services**

The programme team, including colleagues from the Department of Health and Social Care and NHSE/I, spent the second half of 2019/20 developing the strategy and engaging with a variety of leaders from organisations across the NHS family. Mindful of the importance of prioritising the NHS’s response to Coronavirus (COVID-19), we continue to develop the operational, legal, and commercial plan for the programme, and build a library of resources to support organisations in the future. We expect to resume engagement with key NHS and other stakeholders when capacity returns to the system.



As UK-led innovations are proven as ‘ready for spread’ in England, we will support their global export through the work of Healthcare UK. **We will also form an NHS Export Collaborative with Healthcare UK by 2021, working with selected trusts to export NHS innovations.**



NHS Long Term Plan, 2019

Prosperity Fund

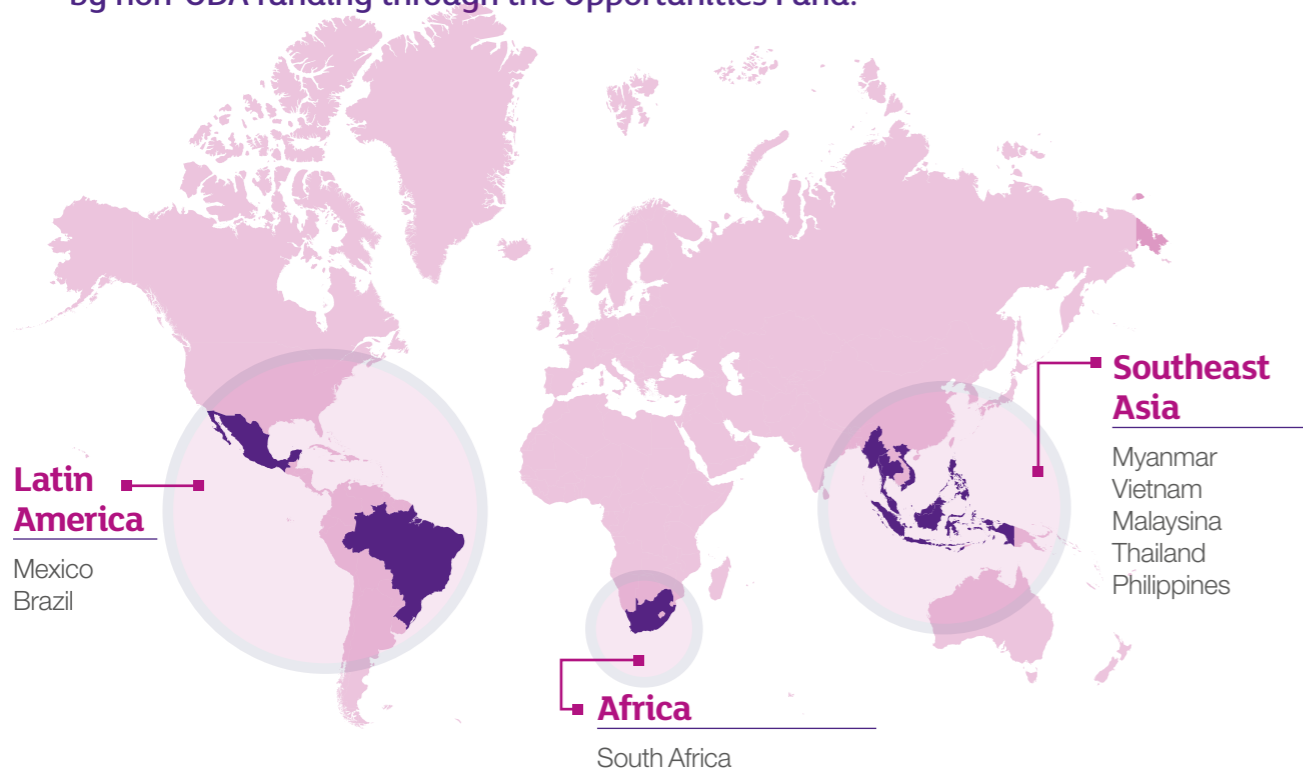
The **Prosperity Fund** is a £1.2bn Overseas Development Assistance (ODA) funded programme supporting inclusive economic growth and poverty reduction in 23 middle income countries. It is split across 12 thematic and bilateral programmes. DIT are working with the Foreign & Commonwealth Office (FCO) and the NHS to support the introduction of the Prosperity Fund's Better Health Programme (BHP).

The programme will provide technical collaboration in the eight countries with a £79.3m ODA budget, supported by non-ODA funding through the Opportunities Fund.

30+
Activities to promote UK as a partner overseas and engage UK suppliers

500+
UK organisations engaged

700+
Partner stakeholder individuals engaged (gov and private sector)



- Life Sciences & R&D
- Education & Training
- NCD Strategies
- Provider Quality Improvement
- Digital Health



Through the Better Health Programme, the UK isn't just providing technical assistance but rather enabling collaboration and facilitating debate on technical solutions to health challenges which many countries are facing simultaneously*

Vageesh Jain, Public Health Registrar, BMJ

* www.bmj.com/company/global-health-ii/mobilising-institutional-health-partnerships/



The countries are all on a journey towards meeting the UN's 2030 ambition of Universal Healthcare Coverage, and this Programme will provide technical assistance to strengthen their health systems.

Meeting these objectives will not only help advance economic development in the partner countries, but will also create opportunities for international and UK businesses and NHS as a secondary benefit. We are leading on this long-term trade and development relationship, facilitating support drawn from the NHS and private sector to assist countries with health systems strengthening, digital health interventions, education and training programmes, and research and development. Provisional estimates are that the programme could generate an average £1.30 for each £1 invested locally, and a similar amount in terms of exports for the UK.

During 2019/20 we worked on a range of high impact initiatives to help support the ongoing development of the BHP through Non-ODA funding or integrating with other DIT events. This included:

In summer

- Promoted BHP at NHS Confederation Annual Conference and at NHS Expo 19 supporting inward delegations from three partner countries
- Hosted a delegation from Brazil to understand the UK's approach to medicines regulation and health technology assessment and hosted an event on UK digital health at Hospitalar 2019 in Sao Paulo
- Facilitated the visit of the Mexican Minister of Health to a primary care centre in East London
- Organised speaking sessions at digital health conferences in Kuala Lumpur and Johannesburg
- Supported a multi-country visit to attend a symposium at Wilton Park, followed by a visit to Kings College London Hospital, and the Care Conference in London



Thailand

Following inward visits to the UK and in-country visits, DIT met with the Ministry of Public Health and Thai Government agencies to help support development of a potential 'Genomics Thailand'



Brazil

DIT supported a workshop in Brasilia, Brazil, with 85 stakeholders delivered by the UK National Institute for Health and Care Excellence (NICE), covering topics around Health Technology Assessment (HTA) with the aim of establishing a longer-term relationship



South Africa

The Government of the Western Cape have developed a vision for UHC. DIT supported discussions and information exchange, with the potential of supporting the development of UHC in the Province by helping the Government to strengthen their health system

In winter

- Supported a delegation from the Vietnamese Ministry of Health to meet with NHS officials and promoted UK Digital Healthcare excellence in Ho Chi Minh City
- In conjunction with the Foreign & Commonwealth Office and the British Embassy in Bangkok supported meetings at the annual Prince Mahidol Award Conference, a leading UHC conference.
- Led a workshop to scope a UK offer around Health Systems Strengthening with HMG, NHS, and other UK leaders to respond to emerging opportunities
- Promoted the UK sector to Brazilian stakeholders at CONAHP 2019

* <https://www.gov.uk/government/news/jeremy-hunt-calls-for-global-focus-on-patient-safety>

Major Events showcase



Key to Healthcare UK objectives are events and activities to promote the UK overseas and inform UK suppliers of opportunities. These are some of the key Highlights from Healthcare UK in 2019/20.

13 events
Inward missions

9 events
Outward missions



14 events
Conferences with stand/speaker

Part 1: Trade Missions





📍 Delhi, Bangalore and Mumbai

👥 14 UK companies, 22 Delegates

Trade Mission to India AI in healthcare

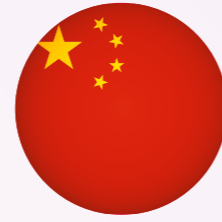
The trade mission focussing on AI in healthcare was led by Lord Prior, Chairman of NHSE/I, and attracted 13 companies and an NHS organisation. We saw the success of the Future Tech Fest mission in December 2018 and agreed this mission would advance our market development for new technology, showcasing innovation. We were able to showcase UK expertise to leading Indian hospitals, diagnostic laboratories, medtech companies & Healthcare as well as promoting the UK's strengths to state

governments.

The high level participation from Indian companies resulted in 80 leads, top level meetings with national and state Ministries of Health and Family Welfare, engagement with the top leadership of private healthcare, including Apollo, Biocon, Reliance, Radiant, Hinduja and Tata which were key highlights of this trade mission.

Nearly all delegate companies are now engaged with the market with export wins expected.





📍 Beijing, Tianjin, Shanghai and Wuhan

👥 16 delegates

Trade Mission to China Oncology Mission

A week-long mission brought UK companies and organisations with Oncology related products, services and expertise to China with the purpose of business development, investment, and collaboration. In total, 16 UK companies, NHS trusts, hospitals and research organisations were represented here alongside innovative Chinese partners. These UK organisations are at the forefront of the UK's cancer pathway from diagnostics used in early detection to palliative care.

Delegates included global experts from the Christie and Royal Marsden NHS Trusts and the world's largest cancer charity, Cancer Research UK. In each location they discussed best-practice in tackling cancer and explored collaborative opportunities with policy makers, hospitals, researchers, and businesses. The mission was delivered in partnership with Peking Union Medical College and School of Public Health and the Chinese National Cancer Centre. Sponsors included Santander, Relx-Elsevier, Circle Harmony and St Lucia Consulting.

There was a total of 14 keynote speeches, 6 panels and 3 sessions of business matching for 16 delegates from the UK.

Key highlights included:

- **Wuhan** – UK-China Oncology Forum: HMTC Richard Burn gave the opening speech for the UK-China Oncology Innovation seminar followed by a group of leading UK oncology experts attending an interactive roundtable session
- **Beijing** – seminar on UK-China Shared Oncology Challenges and B2B business matching, and networking lunch to celebrate 100 years of the UK Department of Health and Social Care
- **Beijing** – MOU signed between Royal Marsden and Auro Medical
- **Tianjin** – Workshop on Tianjin healthcare sector opportunities and UK oncology expertise and MOU Signing Ceremony of Circle Harmony on International Research Centre Project
- **Shanghai** – Seminar: UK- China Oncology Innovation Mission in Shanghai and Santander hosted the Business Reception





📍 Jakarta and Ho Chi Minh City

👥 10 UK companies

Trade Mission to Vietnam and Indonesia Digital Health Mission to Southeast Asia

Vietnam and Indonesia are high growth emerging markets with young populations using smart technology more and more in all aspects of their lives. Healthcare UK led a Digital Health Mission to these two markets focusing on remote monitoring, telemedicine, AI and diagnostics and digital primary care. The delegation was a diverse set of organisations from small SMEs to large multinationals. Using the momentum generated by the Better Health Programme, they were able to showcase UK expertise to leading government officials, digital health companies, hospitals, insurers and SMEs from across Indonesia and Vietnam.

Highlights of the event included high-level participation from over 350 government and business stakeholder individuals leading to high quality conversations and promotion of UK excellence in 'whole system' digital health system. This included:

- Working lunch with leading Indonesian health-tech company Halodoc
- Large workshop with Ministry of Health and hospital providers sponsored by leading UK companies Serco and Prudential in Jakarta
- Innovation sharing session with Saigon Innovation Hub
- Event in Ho Chi Minh in collaboration with Ministry of Health, FPT and Ho Chi Minh Medical University with over 200 Vietnam stakeholders

Nearly all delegate companies are now engaged with the market and interested in exploring neighbours. The UK has also made multiple connections to share its digital health expertise to both health systems.



Part 2: Major Exhibitions and Conferences



Manchester, UK

NHS Expo

Health and Care Innovation Expo 2019

Healthcare UK has been attending NHS Expo annually to promote the benefits of the NHS to engage internationally and promote the support DIT can provide. This year we had another successful year at a conference that attracted 5,000 people from the NHS, social care, local government, the third sector and the commercial sector.

The 2019 theme was the NHS Long Term Plan, and Healthcare UK showcased how international collaboration can help deliver on these commitments. Healthcare UK delivered an interactive digital pavilion where NHS stakeholders could discover DIT services to help them develop capacity and capability to export and meet DIT advisors and subject specialists on a one-to-one basis. We also shared information on how to get involved in the Export Catalyst and Export Collaborative programmes, as well as case studies on successful projects delivered by NHS trusts and digital health SMEs.

Other key highlights included:

- Over 150 quality interactions and meetings with NHS and private sector suppliers
- Hosting international delegations from Africa, Europe, Latin America, and SE Asia with 30+ meetings with UK suppliers including themed roundtables
- Joint NHSE and DIT reception hosted by Baroness Dido Harding and Noel Gordon with over 100 key NHS influencers attending including Simon Stevens
- Primary care pop up session with NHS leaders including Sam Shah, Murray Cochrane and Mark Baumfield



 Dubai, United Arab Emirates

Arab Health

Arab Health 2020

Healthcare UK had another successful year at Arab Health, meeting with healthcare providers from the region. Arab Health 2020 saw over 55,000 attendees, with more than 4,250 companies exhibiting their latest products and a total of 159 countries represented at the show. Over 200 UK companies were exhibiting at Arab Health, with delegations from England, Scotland, Northern Ireland, and Wales.

Healthcare UK delivered a campaign of events highlighting UK expertise and capability in 'prevention, quality and innovation' and supported UK businesses to identify new export opportunities across several countries. Healthcare UK's programme also offered UK organisations the opportunity to gain a better understanding of regional healthcare demands.

Healthcare UK held successful Government-to-Government engagements with Ministries and Health Authorities, as well as senior-level engagements with key stakeholders from across the region.

Numerous high-profile events were successfully delivered, including:

- A very well received evening reception at the British Embassy with over 500 guests, including over 150 regional stakeholders, that provided an excellent opportunity for networking
- A panel discussion with a keynote speech by Noel Gordon, Chair of NHS Digital, and UK, Emirati, and Saudi speakers on delivering value-based healthcare aimed to provide a starting point for discussion on best practice and introduce opportunities for collaboration
- A collaborative event with the Saudi Ministry of Health on the 'Saudi Healthcare Transformation', giving UK organisations an overview of the rapidly developing Saudi healthcare market and major upcoming opportunities
- A seminar on Education and Workforce training was hosted, with the panel comprising of prominent UK figures including from Universities and Royal Colleges

Hospital of the Future

Healthcare UK's campaign, Hospital of the Future was the theme for Arab Health and for two Singapore events. The aim was to promote NHS and industry solutions including how digital solutions are improving healthcare in the UK, along with case studies to reflect NHS Trusts work in the markets such as Kings Liver Disease Pathway, GOSH, diabetes pathways and prevention. Press articles were published and social media further supported the promotion to audiences. Promotional marketing collateral to promote at the shows includes: brochure, case studies and a digital tool to find UK suppliers.



London, UK

Health Plus Care 2019

Health Plus Care is the UK's largest collaborative event for the entire health and social care community held annually in ExCel London. The event focuses on health and care integration, digital health and patient safety exhibitions and speaking events with 6,000 attendees, nearly 40% of which were NHS trusts.

Healthcare UK hosted a theatre space for the first time at this event with a two-day programme of speakers promoting international healthcare collaboration and innovation. Healthcare UK's objectives at this event were raising awareness of the commercial and other benefits available through exporting products, services and intellectual property in our sector offers.

Our aim was to build confidence amongst those companies and trusts new to exporting, deliver thought provoking panels and showcase successful companies and trusts to encourage UK organisations to think internationally.

Our programme included a variety of speakers from the public and private sector such as associate partners from EY, the DIT Chief Scientific Advisor, the CEO of the Yorkshire & Humber Academic Health Science Network as well as an engaging panel session led by our HCUK geo-leads.

We also hosted key UK innovators to speak about their international journeys including: Dr. Ben Maruthappu of Cera Care, Mindy Daeschner of Doctorlink and Sheriff Abdullahi of GE Healthcare Partners.



Regional Outline:

Africa



Opportunities for UK organisations

- Healthcare improvement programmes are among the top priorities for most of our partner governments in Africa.
- The incredible ambition to deliver better health outcomes for their population means that healthcare spending is increasing at a faster rate than in high income countries.
- Many are planning to roll out universal access to healthcare in this decade, with the UK a natural partner for those looking to benefit from our expertise in implementing healthcare solutions that increase quality, efficiency and deliver better outcomes for populations.
 - Education and training in Egypt
 - Infrastructure in Kenya
 - Digital health in South Africa
- We see our strong partnership with UK Export Finance (UKEF) as being key to our current and future success in Africa, with our staff sourcing infrastructure contracts, connecting with prime contractors and using our extensive supply chain mapping of UK excellence to exceed UK content requirements.
- We know that markets in Africa can be challenging to enter, which is why the advice and support of our network is so valuable to those UK-based organisations considering business opportunities in Africa.

Healthcare UK performance

The Egyptian government has enlisted British companies to help the country reform its healthcare system. Vodafone, the British telecom operation has won a major £100m contract that will form a key-part of the Egyptian government's push to roll out NHS-style universal healthcare for every man, woman and child in the country.

The focus on African markets has been a new area for Healthcare UK, with strategic projects such as Vodafone winning a major contract which will form a key-part of the Egyptian government's push to roll out NHS-style universal healthcare across the country.

For the year ahead, we have identified focus areas to include digital health, education and training, clinical services, infrastructure and health systems strengthening, which have also been informed by our discussions with UK stakeholders. Priority markets include Nigeria, Egypt, Kenya and South Africa.

Our move into these markets has coincided with the initial development of the Better Health Programme in South Africa, with a focus on the secondary benefits originating from the programme expected to provide us with promising leads for UK business.



As Africa grows and develops, international partnerships and investment will be key to unleashing that potential and delivering a better future for all those young people. That is why we have held the UK-Africa Investment Summit. We want the UK to be the investment partner of choice for Africa.



Alok Sharma, International Development Secretary at AIS 2020



There is a compelling logic to HCUK's argument that the UK health sector could be generating greater income flows from engaging internationally. At THET we have been glad to make common cause, exploring the need to manage complex transitions in parts of Africa and Asia where great poverty persists but it is trade, rather than aid, that is increasingly defining those countries relationships with the wider world



Ben Simms, Chief Executive, THET

Key Highlights

Digital healthcare services platform in Egypt, May 2019

Vodafone's programme in partnership with DXC is to provide a digital healthcare services platform to facilitate the roll-out of Egypt's universal health insurance scheme. It will begin as a pilot in Port Said, before being rolled out to four other governorates and then nationwide.

The NHS is also sharing its world-leading healthcare expertise with doctors and nurses from Egypt, thanks to a healthcare Memorandum of Understanding (MOU) that offers training to medical professionals in Egypt. NHS practitioners have already trained the first group of 33 GPs in Egypt, with plans for a total of 300 doctors to be trained by 2020.

UK-Africa Investment Summit 2020

Healthcare was one of the UK sectors showcased at the inaugural UK Africa Investment Summit. The summit was a demonstration of the UK ambition to become Africa's investment partner of choice, benefitting people and businesses across the UK and Africa.

THET Conference 2019

The annual THET conference in London attracts high profile international speakers in healthcare and global development. This year they deliberated the contradictions and challenges faced as we work towards quality Universal Health Coverage (UHC) and the transformational role Health Partnerships are playing in ensuring health for all. Healthcare UK were pleased to exhibit and deliver a 'world cafe' event introducing the work of Healthcare UK in Africa and networking.

Digital Health trip to South Africa, October 2019

Healthcare UK's Digital Health Specialist Hassan Chaudhury gave the international keynote speech and participated in panel discussions at the South African Digital Health Conference 2019 in Johannesburg, the premier event for digital health in South Africa. Healthcare UK also hosted a digital health roundtable in Cape Town with stakeholders and decision makers in the Western Cape to discuss how the UK and South Africa could join forces to establish new forms of digital health leadership using the NHS Digital Academy as an example. An official request was made for the NHS Digital Academy to partner with the roundtable attendees. This was accompanied by two additional days of meetings and engagement following up with both public and private sectors including those following on from the NHS Expo inward delegation leading to multiple opportunities for UK businesses. We were accompanied by British digital health firm, Xenzone, who explained their 19-year history of supporting the NHS covering over 70% of the country with mental health counselling.

MoU between Kenya and the Christie

In the sidelines of the Africa Investment Summit, the Christie NHS Foundation Trust and the Government of Kenya signed an MoU on improving oncology services in Kenya. The partnership will enable collaboration between the Christie and the Kenyatta University Teaching Research and Referral Hospital on both prevention and treatment of non-communicable diseases. The trust followed up on the signing of the MoU with a meeting later in January with the President of Kenya, Uhuru Kenyatta, to discuss how to embark on the collaboration to improve outcomes in Kenya.

Regional Outline:

China



Opportunities for UK organisations

There are huge opportunities in healthcare as China's growing middle classes become more demanding of international standards in healthcare and through central government policies such as Healthy China 2030, which aims to develop the highest international level standards in healthcare and clinical standards.

Opportunities for UK organisations include:

- **Clinical Services** for several diseases including respiratory and COPD, genetics testing, elderly care and dementia, oncology, stroke services, emergency care and major trauma, cardiac services, children's services, screening, and mental health.
- **Healthcare Infrastructure** providing innovative hospital design, finance, build and operation models, planning/delivering clinical services, and management systems.
- **Digital Health**, valued at £70 billion by 2020, driven by the Chinese population's willingness to adopt technology with a vast internet infrastructure already in place, and the need to reduce cost and improve access to quality healthcare.*
- **Healthy Ageing**, with 35% of the population forecasted to be over 60 by 2050, national level policies are encouraging the take up of smart elderly care and better integrated elderly and medical care systems. In 2017, the market value of the elderly care market in China was RMB 5,600 billion, and is predicted to rise to RMB 14,000 billion by 2024**.

Healthcare UK performance

We have continued to build our campaign in China this year and have a widespread network regionally in China to explore opportunities. We have had some good successes in the market. The COVID-19 outbreak has unfortunately had a significant impact on activity in China from January 2020 onwards.



This Mission exceeded all my expectations. DIT introduced us to valuable contacts every day, which will enable us to potentially land several projects in iCampus in Wuxi. The level of support with introductions and following up with partners really has been marvellous

Elaine Taylor-Whilde CEO, Ninehealth Global



Healthcare UK has been instrumental in facilitating new market opportunities in several countries, including China and India. Healthcare UK is uniquely positioned to support companies such as Inavya scale-up internationally, and we commend Healthcare UK to others!

Michael Wilkinson, Founder and CEO, Inavya Ventures Ltd



Healthcare UK and DIT have supported in many ways, for example, mission/trade trips which are crucial for SME's to navigate what can be a daunting process if not supported. As well as all the support, this has obviously influenced revenue generation, and this has increased significantly over the past year and revenue from the app alone will generate £52,769,000 additional revenue in the next year.

Annie Barr MBE, Clinical Director/Founder, AB Health Group

Key Highlights

**China Digital Health Mission
29 August –7 September 2019**

DIT led a delegation of UK digital health companies and key opinion leaders from the NHS to showcase UK expertise in national forums in Shanghai, Chengdu and Wuxi, focusing on hot topics such as artificial intelligence, digital integrated primary care, and the Internet of Things. One of the highlights of the Wuxi IoT Expo was the opening ceremony of AstraZeneca (AZ) and Wuxi municipal government's iCampus.

This also included a visit to the WAIC (World AI conference in Shanghai) and a visit to Wuxi, China's designated IOT Capital, where a health forum led by AstraZeneca showcased leading healthcare solutions that have been piloted in the surrounding healthcare system of Jiangsu.



China and Hong Kong are highly attractive markets for UK healthcare and life sciences. Opportunities are driven by ambitious reforms, ageing societies and the emergence of middle-class health consumers. China is interested in the UK's innovative pharmaceutical assets, med-tech and clinical excellence as it manages the shared global challenge of Covid-19. International travel has changed, but China and Hong Kong are open for business. Our DIT team in-market combines clinical expertise with a strong grasp of the regulatory environment and a network of contacts across Chinese companies, investors and government agencies. We are using innovative online tools to build awareness of the NHS and UK business offer in the market and to make connections with Chinese partners.

John Edwards, Her Majesty's Trade Commissioner for China and Hong Kong

**DIT China Oncology Mission
28 October –1 November 2019**

Total 14 keynote speeches, 6 panels and 3 sessions of business matching for 16 delegates from the UK. Toured Beijing, Tianjin, Shanghai, Wuhan.

- Wuhan – UK-China Oncology Forum – HMTC Richard Burn gave opening speech for UK-China Oncology Innovation seminar followed by a group of leading UK oncology experts attending an interactive round table session afterwards.
- Beijing – seminar on UK-China Shared Oncology Challenges, B2B business matching and a networking lunch to celebrate 100 years of the UK Department of Health and Social Care.
- Beijing – MOU signed between Royal Marsden and Auro Medical.
- Tianjin – Workshop to match Tianjin healthcare sector opportunities with UK oncology expertise.
- Tianjin - MoU Signing Ceremony of Circle Harmony on International Research Centre Project
- Shanghai - UK– China Oncology Innovation Seminar, an evening reception sponsored by Santander.



Although BMJ is already active in China, DIT was able to open up friendly and effective opportunities for us and other UK companies to jointly engage local government and businesses, something that UK companies can benefit from at various stages of development.

Yuyan Kong, Managing Director, BMJ Publishing Group

* Boston Consulting Group 'China's Digital Health-care Revolution'

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Regional Outline:

India



Opportunities for UK organisations

- Healthcare is one of the fastest growing sectors in India, with an expected value of \$280 billion this year. India spends around 5% of its GDP on healthcare when the private sector is added in, and public health spending will see an increase from 1.5% to 2.5% by 2025.
- The hospital industry alone is forecast to increase to US\$ 132.84 billion by 2022 at a CAGR of 16%**.
- Modi government's major health investment in its Ayushman Bharat or National Health Protection Scheme, will cover over 100 million poor families (approximately half a billion beneficiaries) providing coverage for secondary and tertiary care hospital care. 150,000 new Health and Wellbeing Centres are planned for more remote communities.
- There are major challenges for the healthcare system in India, including the need for increased and upgraded infrastructure and medical technology, digitisation, especially to reach more remote populations, upskilling doctors and nurses and developing new approaches to personalised medicine e.g. genomics and drug discovery. This all must be achieved at a comparatively low price point, especially for government services.
- An analysis of the health and life sciences opportunities for the UK concluded that the main opportunities lay in healthcare infrastructure, digital health, medical technology, and biopharma.

* <https://www.ibef.org/industry/healthcare-India.aspx>** <https://www.ibef.org/industry/healthcare-india.aspx>

- Indian government campaigns like 'Make in India' and 'Vision 2020' aim to promote Indian based manufacture and development leading to opportunities for outward direct investment to support UK exports.

Healthcare UK performance

The India campaign is an integrated healthcare and life sciences programme with a single target in 2019/20. This result includes wins that combine medical technology with digital systems which confirms the value of an integrated approach. The wins attributed to healthcare include an export win won by Cumbria, Northumberland, Tyne and Wear NHS Trust.

The team worked on a pipeline of 158 opportunities across the year, mainly from private healthcare providers but also included some government tenders and philanthropic institutions. The focus has been on opportunities especially in infrastructure and digital health, as well as training.

Major opportunities for the coming year lie in new infrastructure projects (e.g. new cancer centres), remote assessment, diagnostics, treatment and case management, smart diagnostics, patient-facing education and monitoring and cutting-edge medical technology. The COVID-19 pandemic has also led to increased interest in surge hospital projects and remote healthcare systems.

“Excellent mission with dedicated staff keen to support afterwards. Very grateful for the opportunity. Brilliant to get to understand the developing public system here. Such high-quality individuals that were met.”

Stephanie Campbell, CEO, OKKO Health

“

Leading British healthtech specialists are working with Indian tech and clinical leaders to establish how Artificial Intelligence can be used to drive early diagnosis of fatal and severely life-limiting diseases, as part of the India-UK Tech Partnership. As part of this, the UK Government is investing £1 million in an initial pilot stage of the Healthcare Artificial Intelligence (AI) Catalyst. The Catalyst—established by Healthcare UK—will focus on exporting UK health expertise and is jointly backed by the Department of Health and Social Care and the Department for International Trade. The initiative is designed to support Prime Minister Modi's socio-economic priorities and the UK's Industrial Strategy.

”

Noel Gordon,
Chair of NHS Digital and of Healthcare UK's Advisory Board about the HAIC

Key Highlights

AI in Healthcare Trade Mission to Delhi, Bangalore and Mumbai, 9 – 13 December 2019

The trade mission focussing on AI in Healthcare was led by Lord Prior, Chairman of NHSE/I, and attracted 14 companies and an NHS Trust. 80 leads were identified for follow up. Through the mission, Healthcare UK was able to showcase the UK's strength in cutting-edge innovation expertise to leading Indian Hospitals, Diagnostic Laboratories, MedTech companies and State Governments.

Healthcare Artificial Intelligence Catalyst, 2018 -2020

The Healthcare Artificial Intelligence Catalyst (HAIC) was set up with the Government of India to address the shortage of healthcare professionals for the Ayushman Bharat programme through Artificial Intelligence. The project was announced during PM Modi's visit in April 2018 and aims to demonstrate the impact of AI solutions, such as those being developed in the UK, across the Indian health system. The project is also aimed at establishing AI as a key area for UK-India collaboration.

Inward visit by the Tamil Nadu Chief Minister and Health Secretary, 29 August 2019

We welcomed the Tamil Nadu Chief Minister and health secretary to a visit to London Healthcare (including Kings College Hospital and London Ambulance Service). Memoranda of Understanding were signed with International Skills Development Corporation, London School of Hygiene Tropical Medicine and Kings College Hospital NHS Foundation Trust, and an introductory meeting held with Health Education England.

Second India – UK Healthcare Conference, Birmingham, 11 February 2020

Healthcare UK co-organised this conference with the Indian High Commission. It brought UK companies and NHS organisations together with leading national and state government leaders and Indian healthcare companies and attracted major speakers from the Indian National Health Authority, Tata, Madya Pradesh and Haryana Health Ministries together with NHS CEOs and industry leaders.

“

I thought the recent trade mission to India was exceptionally well organised and made a very favourable impression on the wide range of Indian healthcare companies and government officials that we met. You handled a complex and challenging programme with great aplomb and charm, supported by a first-class team.

Lord Prior, Chairman of NHS England

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“

I just wanted to say thanks to you at DIT and Healthcare UK for all the support you have given us in working in India and encouraging us to make the breakthroughs we have.

”

Lydia Saunders, Director of Health, Northgate Public Services

Regional Outline:

Southeast Asia

Opportunities for UK organisations

Southeast Asia is a diverse and high growth region, with different healthcare priorities and challenges in each country. Countries span from small city states like Singapore to large, archipelagos such as the Philippines and Indonesia.

Across APAC, healthcare spending is predicted to recover with growth of 7.8% in 2021* and these nations' rapid changes are presenting opportunities to improve healthcare including:

- In countries such as Singapore and Thailand with ageing populations, there are opportunities in healthy ageing, particularly in the use of digital innovation to enable monitoring and management of long-term conditions.
- Progressing Universal Healthcare Coverage with new care models, funding and policies
- The rise of non-communicable diseases and focus on primary care, prevention and quality of care are seen as government priorities
- Healthcare responding to a digital acceleration with young populations across Asia
- Digital innovation in healthcare is an opportunity across the region from telemedicine, to electronic patient records such as in Vietnam, to big data to medical simulation in training. This increases ease of access for healthcare across large geographies
- Education and Training is a key focus across the region, a number of UK universities have active and successful partnerships in Southeast Asia

It takes the right UK organisation to work in the region, and we are building the market by promoting the NHS and wider UK private and academic sectors who have a great reputation and historical links.

* EIU: <https://www.eiu.com/r/campaigns/covid-19-the-impact-on-healthcare-expenditure>



Healthcare UK performance:

The South East Asia campaign has focussed largely on three main thematic areas: clinical services, digital health and education and training. 2019/20 was the second year of the healthcare campaign.

Healthcare UK is also continuing its work on generating and realising secondary benefits of the Better Health Programme within the wider HMG Prosperity Fund in Southeast Asia. This includes working on Government-to-Government partnerships on how the UK experience can help on extending universal healthcare coverage. This was a key strand of work in 2019/20 and will continue to be built on in the coming years.

In 2019/20 the team worked with organisations to respond to a wide range of digital health, education and training, clinical services, and infrastructure opportunities across the region.

For the 2020/21 pipeline, we plan to increase digital health, health systems strengthening and clinical services opportunities. We will be looking at how we can also leverage the UK Grand Challenges assets as set out in the UK Government's Industrial strategy, particularly ageing society. Finally, we will be looking at how we can promote our innovative life science sector in the region in 2020/21.



Healthcare UK and the DIT has been invaluable towards Serco's ambitions to expand into South East Asia. DIT Singapore has assisted us in establishing high value Healthcare business contacts as well as the co-creation of workshops in Singapore. We look forward to the continued support of the DIT to assist Serco in establishing an operational presence in South East Asia.

Nicolas Yap, Head of Business Development, Singapore & Malaysia, Serco



Healthcare UK has been a supportive partner in Malaysia's journey in digital health. They have consistently been on hand to collaborate, sharing best practice and offering introductions to exciting UK innovations. Healthcare UK has done an exemplary job in promoting global trade and investment. Their advisory role and facilitation benefits not only the UK but also UK's trading partners as well. Together, we work towards global prosperity.

Dr. Fazilah Allaudin, Senior Deputy Director, Ministry of Health Malaysia



Key Highlights

HI.TEC Singapore, April 2019

Healthcare UK were delighted to facilitate the UK presence at HI.TEC 2019 in April in Singapore as MOH Holdings (MOHH) international partner for the event. The event was opened by Dr Amy Khor, Senior Minister of State in the Ministry of Health and Ministry of the Environment and Water Resources. Keynote speeches were given by Noel Gordon, chair of NHS Digital and the Healthcare UK advisory board, and Simon Corben, NHS England and NHS Improvement, sharing UK expertise in healthcare. We were also joined by a range of UK organisations offering innovative solutions to Singaporean hospital settings.

Inward visit by the Malaysian Minister for Health, May 2019

In May 2019, Healthcare UK hosted a series of meetings for the Malaysian Minister for Health on digital healthcare including meetings with senior healthcare officials, a roundtable with healthcare organisations and a meeting with Her Majesty's Trade Commissioner, Richard Graham MP. This was built on with our Digital Health Specialist promoting the UK Digital health sector at the 2019 Malaysia Telemedicine Conference in Kuala Lumpur in June.

Trade Mission to Indonesia and Vietnam, November 2019

In November 2019, we delivered a trade mission with organisations working in digital innovation in healthcare visiting Jakarta, Indonesia and Ho Chi Minh City, Vietnam. Eight organisations joined us for pitching sessions, public facing events, B2B meetings and meetings with key stakeholders both in the public and private sectors. We partnered with Serco and Prudential who already have great healthcare presence in the region.

Prince Mahidol Award Conference in Bangkok, January 2020

In January 2020, we promoted the UK at the Prince Mahidol Award Conference in Bangkok, working with FCO and BMJ on the theme of UK experience in 'Universal Health Coverage' through the Better Health Programme. The aim was to create new opportunities for international health partnerships including for our world-leading UK health sector.



The 10 countries within the Association of Southeast Asian Nations are an intoxicating mix of advanced digital health technologies and cities through to expansive rural communities with limited access to health provision.

They are united through open and welcoming cultures, emerging markets leapfrogging dogmatic and entrenched thinking within healthcare, bold pioneers taking advantage of the incredible advances in digital health.

PatientSource is exceptionally fortunate to work closely with Healthcare UK who expertly guide and advise on the region, making valuable introductions, keeping momentum of discussions and interjecting with valuable insight at opportune times thus ensuring a beneficial and successful outcome for all parties.

Lee Francis, International Sales and Marketing Director PatientSource



Regional Outline:

Middle East



Opportunities for UK organisations

In line with longer-term transformation plans across the GCC, healthcare is a key focus area for development. Projections of healthcare spend across the GCC are expected to reach US\$ 104.6 billion by 2022, though with oil prices significantly impacting public spending power, this remains continually in flux.

The Middle East's healthcare challenges feature rapidly growing populations, rising life expectancy, and a high incidence of chronic health conditions and non-communicable diseases.

There are several key areas for opportunities across the GCC, including:

- Digital health is high on the agenda of Middle East providers, and opportunities range from telemedicine to solutions that help manage chronic diseases
- In healthcare education and training, there are opportunities to support the capacity building in-country 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 and cardiology
- Healthcare systems development is another area where UK expertise has been welcomed to support the introduction of new forms of regulation and improving the effectiveness of healthcare services delivery

- Solutions that will help support the GCC population in relation to preventive care and healthy ageing will also be prominent on the healthcare agenda

Healthcare UK performance

An ambitious target of £215 million was set for 2019/20 healthcare exports to the Middle East.

Significant new opportunities were added to the pipeline this year, and the development of several new hospitals in Oman has resulted in opportunities for UK service providers and facilities management suppliers.

We have also successfully extended education and training offers to new parts of the Middle East, including to Saudi Arabia and Kuwait.

For the 2020/21 pipeline, we plan to increase digital health, including AI and Big Data, and clinical services opportunities, as well as exploring new areas of collaboration to support healthcare systems development across the Middle East.



NHS Health Education England runs the International Medical Post-Graduate Training scheme to provide access to the NHS' world-class training environments to partner governments overseas. HCUK's input and support in expanding this programme into Kuwait was hugely valued. Their team's professionalism, insight into the health system, and facilitating introductions to relevant senior stakeholders.

Prof. Ged Byrne, OBE, Director of Global Engagement, Health Education England



GOSH has a longstanding presence in the Middle East and we are grateful for the ongoing collaboration with Healthcare UK. Over the last year, Healthcare UK has supported GOSH in a number of ways including initiating introductions with potential partners, raising the GOSH profile through local discussions and by their consistent commitment in promoting GOSH as a leading centre of excellence in paediatric healthcare. We are thankful for the dedication and co-operation of the whole team and look forward to future association.

Trevor Clarke, Director of International Services, Great Ormond Street Hospital for Children NHS Foundation Trust



Key Highlights

Arab Health, January 2020, Dubai

Healthcare UK delivered a wide-ranging programme of activities at Arab Health 2020 showcasing UK expertise, including an Embassy Reception, seminars on Value-based Healthcare, the Saudi Healthcare Transformation, Education & Training and Market Opportunities in the Middle East. All our activities enabled UK companies to gain a better understanding of the healthcare opportunities in the Middle East, discuss current trends and develop contacts with future partners.

Trade Mission to Saudi Arabia, September 2019

14 public and private sector UK healthcare organisations from across the fields of primary care, digital health and non-communicable diseases took part in HCUK's trade mission to Saudi Arabia in September 2019. Over the course of three days, the organisations visited both Jeddah and Riyadh for a programme of meetings and events that provided a comprehensive overview of current and upcoming healthcare opportunities in the Kingdom, as well as introductions to a significant number of key Saudi stakeholders in the healthcare space.

Inward AI and Big Data in Healthcare Mission from Qatar, March 2020

A senior delegation from across the Qatari healthcare system visited the UK to meet with leading UK organisations in the AI and Big Data in Healthcare space. Over a two-day programme of meetings and receptions, the delegation met with 15 innovative public and private sector organisations and identified opportunities for UK expertise to support strengthening and developing the application of AI and Big Data within the healthcare sector in Qatar.



The Middle East, and in particular the Gulf, is a key region of focus for the UK government to promote UK expertise and capability in healthcare. Governments in the GCC are working to deliver the best healthcare provision for their people, transforming their healthcare systems to meet the ambitions outlined in their Country Vision strategies. UK companies with high-quality, innovative healthcare solutions continue to add value in the Gulf, building on the strong foundations of our UK-GCC relationship. The demand for remote healthcare services from telemedicine to remote diagnostics will only increase beyond the COVID pandemic. It is through knowledge-sharing, collaboration and partnership that we can move forward together to provide better outcomes for patients in the UK and here in the region. The UK's presence at Arab Health each year demonstrates this commitment, and we look forward to continuing to work with our partners in the Gulf – and across the wider region – as they strengthen their healthcare systems.

Prof. Ged Byrne, OBE, Director of Global Engagement, Health Education England



Imperial College Healthcare NHS Trust supported a number of trade missions to the Middle East in 2019/20. The trade missions provided an effective platform to research opportunities and markets, promote our services and to develop a delivery network. It has also provided an opportunity to collaborate with other UK exporting organisations. Healthcare UK in-country posts have also supported us to follow up and look out for new business opportunities. Being a small UK based commercial team, Healthcare UK has supported us to have a much greater reach and depth in the region.

Alistair Russell, Director of Business Development, Imperial College Healthcare NHS Trust

* <https://worldhealthcarejournal.com/newsdit-article/34f9abf6572088b022bcb60ac3d9661a/>



Northumberland, Tyne and Wear NHS Foundation Trust

NTW has launched a partnership with one of India's largest providers of mental health services, Cadabams Group.

The partnership offers both organisations the opportunity to share expertise in the delivery of mental health care to different populations. As part of the partnership, NTW will provide support for the Cadabams Group to develop new ways of working within areas including addictions, smart prescribing, school mental health, community and home-based care.

While NTW will not be directly involved in clinical care, the Trust will support the Cadabams Group on the development of new services and also work on monitoring and reporting systems, so that other organisations can effectively evaluate the benefits of working together.

Both organisations will share expertise in the delivery of mental health care to different populations. I am excited that an association with such an outstanding NHS organisation will bring a quantum leap in the quality and accessibility of mental health and learning disability services across India, as well as providing a huge opportunity for us to mutually learn from each other.

Sandesh Ramesh Cadabam,
Director Cadabams Group

Our Trust is excited to be working with the Cadabams Group. Our partnership is based on shared values including the importance of compassionate care as well as embracing innovation, and I am looking forward to seeing how it develops and how we can learn from each other.

John Lawlor, Chief Executive, NTW



Cambridgeshire and Peterborough NHS Foundation Trust

Cambridgeshire and Peterborough NHS Foundation Trust (CPFT) have partnered with a leading healthcare provider in the Middle East to support them with their training and service development needs. They are working closely with them to provide training in evidence-based treatment and to develop their psychotherapy training programme for residents.

The value of this partnership lies in the recognition that sustainable development relies upon both the acquisition of new skills, and the development of the service and organisational infrastructure, to support continued learning and development. A key element of CPFT's work has been to grow the service and training infrastructure, which will provide their partners with the foundation for continued improvement in the delivery of patient care.

The partnership has provided CPFT staff with an opportunity for professional development and has given them a new perspective, to review and improve their own service delivery. CPFT has reinvested the profit earned from the partnership into their own services, enabling further development and improved care for their local population.

Healthcare UK have supported the Trust from an early stage of our commercial opportunity – they have provided advice to the Trust Board in managing the business relationships within the Gulf States and how to overcome any challenges as well as understanding the implications of working in what can be perceived as a complex area.

Recently we have been working extremely closely with our key account manager, who has been incredibly supportive. She has remained in close contact with our project team to support us with any operational problems we encounter. She has been working hard to support us in developing future relationships and collaborations with other NHS Trusts. In addition to looking for other international work for our team. We are very excited for future business opportunities facilitated by Healthcare UK.



South London and Maudsley NHS Foundation Trust (SLaM)

South London and Maudsley (SLaM) is one of the leading NHS mental health trusts and provides the most extensive portfolio of mental health services in the UK.

Maudsley Health was formed as a joint venture between South London and Maudsley NHS Foundation Trust and the local United Arab Emirates (UAE) partner, MACANI.

Maudsley Health outpatient clinics in UAE were established in 2015. The clinics serve schools, private organisations and self-funding or private health insurance - funded patients. In 2018 Maudsley Health were awarded a three-year contract by the Ministry of Health and Prevention to provide quality improvement services to the public Al Amal Mental Health Hospital in Dubai.

An opportunity was identified for a high-quality child and adolescent mental health provider. There were local entrepreneurs experienced in UAE ventures who were looking for expert partners to fill the need. The partnership with MACANI has been invaluable in building relationships, gaining access to local knowledge, managing local infrastructure and allowing SLaM to focus on clinical expertise.



escalla



escalla are a learning and change management company, with over 20 years' experience supporting client healthcare transformation programmes in the UK and on a global basis. In 2019, DIT helped them work with the Egyptian Minister of Health and Population (EMOH) supporting their Universal Healthcare Insurance Scheme (UHI).

escalla showcased the various projects it has completed with every NHS Trust and GP in the country. They scoped the ways that escalla could best support the Egyptian Family Doctors, who would be the primary gatekeeper and point of contact as all Egyptian citizens were eligible for healthcare. The result was escalla using its network of subject matter experts and experience to create a 10-day experiential learning course in the UK and Egypt that showed how to create care pathways, manage the patient referral process and run an offer of integrated services within the context of a GP Practice.

escalla worked with NHS partners including Royal Free, Guys & St Thomas and Central London Community Healthcare to deliver this, providing a route to market for the NHS to deliver their expertise and generate income. They also worked with a variety of private health sector partners as well.

“escalla have found working with Healthcare UK and the Department for International Trade to be straightforward and beneficial. The advice of how to trade in the region was incredibly useful and they also brokered meetings when in-country funding partners were needed. escalla welcomes further input from Healthcare UK and the Department for International Trade as we continue to expand our footprint within Egypt and the wider region.

Siva Singh, Global Healthcare Director Escalla



TPP

TPP worked with the Supreme Committee for Delivery and Legacy (SCDL), an organisation responsible for delivering the Qatar 2022 Football World Cup. The SCDL was seeking a market-leading integrated health record platform to integrate medical records to improve Workers Welfare. TPP deployed a fully functional primary care Electronic Health Record solution and patient app for all administrative and clinical processes across eight sites on a central cloud infrastructure.

They partnered locally with IS Holding due to their local expertise in delivering healthcare projects in Qatar. TPP suggest identifying local partners early as an essential component to doing business internationally as they aid with navigating local relationships and customs.

Healthcare UK and DIT were instrumental in helping during the initial stages of exporting to the region.

The UK team and local DIT teams provided critical support for identifying local partners, facilitating business contacts and making the necessary introductions. They have invaluable insights into the region, customs and business practices to ensure success can be achieved.

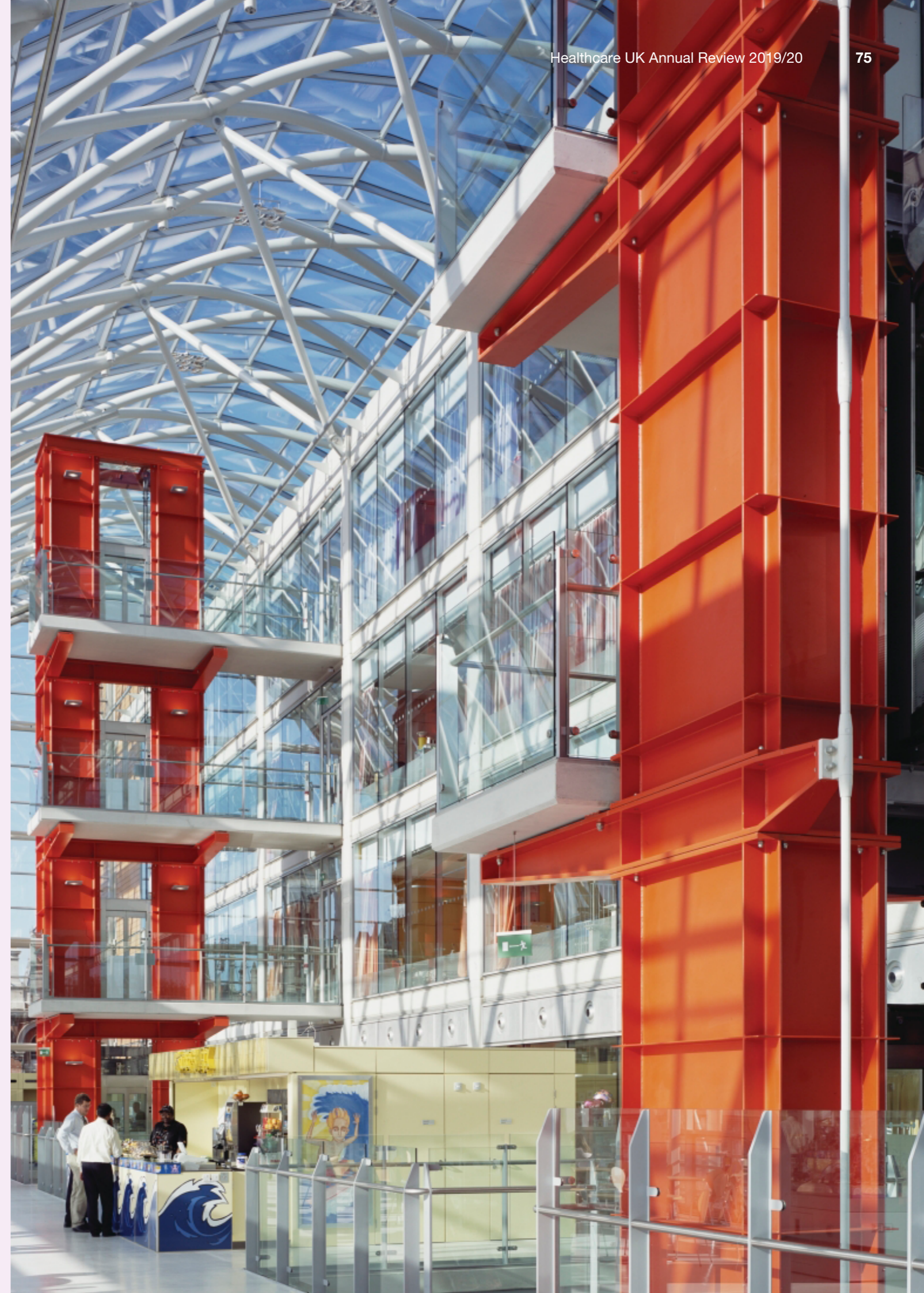


Royal College of General Practitioners

The Royal College of General Practitioners (RCGP) is the professional body for general (medical) practitioners in the UK. RCGP represents and supports GPs on key issues including licensing, education, training, research, and clinical standards. As part of its growing international activity and focus, the RCGP took part in the Healthcare UK Mission to SE Asia. This provided the opportunity to scope possible funding opportunities and identify potential partners/ways of building profile. This was particularly important in Vietnam; a key target country where we had no significant track record. During the visit, a key contact was made at Hanoi Medical University.

Following the visit and securing financial support from an official UK institution in Vietnam and RCGP's business development fund, an RCGP consultant undertook work at the University. The work focused on Curriculum Design & Faculty Development, aligning undergraduate/postgraduate medical curriculum with national training priorities, including primary healthcare and supporting teaching in both. The work was strongly commended by both the University and the main funding partner.

There have been further activities including: a project for a public body responsible for (CME/CPD) training for healthcare professionals, work with a team of in-country Consultants to revise a circular regulating training in this area and a national Vietnamese newspaper published an article on GP training and the RCGP role following the Healthcare Mission and RCGP presentation. All of this has helped to build relationships and raise RCGP's profile. The mission was invaluable to learn about the SE Asian markets and the support provided by DIT Healthcare staff in country.



Looking Ahead to the Future

Healthcare UK will continue to focus on our core objectives supporting UK businesses to grow internationally in a sustainable way. We will also continue opening markets for UK healthcare, addressing barriers and incentives to trade including building

capacity and capability for the NHS and private sector. Finally, we will use trade to underpin the government's agenda for a Global Britain and its ambitions for prosperity, stability, and security worldwide.

The initiatives to achieve these objectives will be:

- Continuing to build on our existing five overseas campaigns, including building our new campaign in Africa
- Supporting the government response to the UK COVID-19 crisis and finding opportunities to assist our overseas partners
- Developing new offers based on demand from markets including enhancing our health systems strengthening, NCD and Healthy Ageing offer based of the Grand Challenges
- Encouraging new innovations from the UK to be exported overseas, particularly the burgeoning UK digital health sector
- Focusing on working more closely with existing Export Catalyst clients, while continuing to build our client base and launching additional services and digital resources
- Building the Export Collaborative Programme with DHSC and NHSE/I ready for launch including engaging key NHS and other stakeholders
- Fostering trade and development opportunities for UK healthcare suppliers through the government's Prosperity Fund Better Health Programme and other development initiatives
- Promoting the UK at key 2020/21 healthcare events in UK and overseas including virtual activities
- Ensuring trade interests of the healthcare services industry are considered in emerging trade policy and building our influence through our cross-Whitehall groups
- Continuing to develop bilateral approaches to deal generation



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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