



White Paper: Nashville Health Care Council's 2017 United Kingdom Study Mission Findings

Healthcare systems in any country are complex, spanning politics, business and public policy, the intersection of which creates the plethora of health systems found globally. This complexity creates a challenge for healthcare companies looking to work across borders. Yet, whilst it is true that each system is specific to its context, many parallels can be drawn across systems, and there are lessons for businesses looking to enter new markets.

It is in this vein that the Nashville Health Care Council, a premier association of healthcare industry leaders, set out to run an international study mission to the UK. Building on the Council's commitment to gather insights from across the globe, the three key objectives for this study mission were:

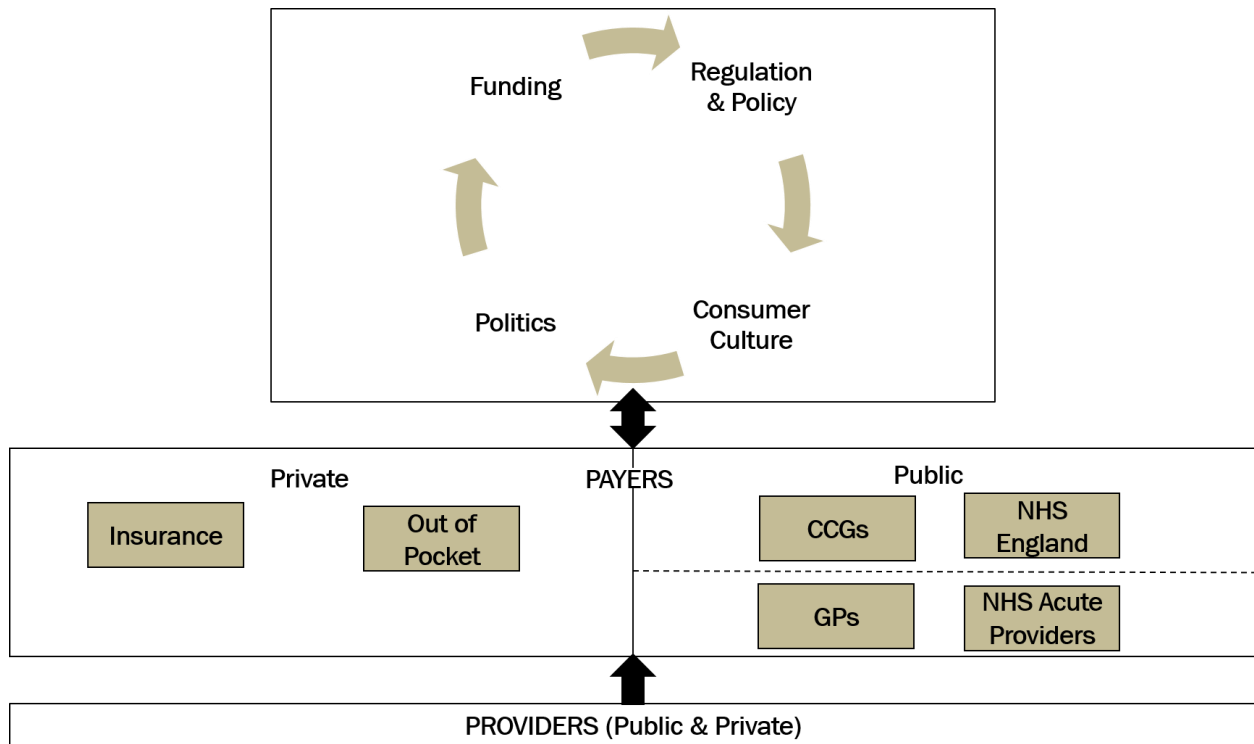
1. To provide trans-Atlantic educational and business opportunities for its members
2. To give its members a chance to develop deeper relationships abroad and with one another
3. To showcase Nashville's healthcare industry on a global stage and establish the region as the healthcare capital of the US

This document developed by the Marwood Group, a healthcare specialist advisory firm, follows this study mission. It seeks to answer the question '*what is the opportunity for international players in the UK healthcare market?*' To do this, the document builds on the diverse dialogue of those who attended the mission, including health system and political experts, business leaders, operators, and individuals from the financial industry. It builds on the content and themes developed through the study mission highlighting the health system's strengths and weaknesses and identifying areas of shared opportunity, including:

1. Supporting the NHS to achieve its efficiency objectives
2. Supporting the NHS to transform services – such as the development of population-based healthcare models
3. Providing a healthcare offering for individual consumers

What's the Nature of the Opportunity for International Players in the English Healthcare Market?

The English Market



Key Factors

The healthcare system in England is dynamic, shaped principally by four factors:

- Funding
- Regulation and Policy
- Consumer Culture
- Politics

These four factors interact, creating evolving opportunities and risks for companies looking to participate in healthcare markets. As stands today, the key factor shaping English healthcare markets is funding. A scarcity of Government funding relative to demand has caused changes in both regulation and policy as well as in consumer culture. Conversely, the impact of politics on healthcare markets is currently static in light of a political focus on wider domestic issues.