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SECTOR OVERVIEW:  
June 2013

India's healthcare sector remains a strong and growing area of opportunity for British businesses. Over the past few months, the UK and India signed a MoU on strategic and technical cooperation in the health sector, and British Cabinet Minister Kenneth Clarke visited India in the context of a UK health business delegation to the country.

Only last week, the UKIBC, in cooperation with BT and ABHI, hosted an event focusing on India's healthcare sector and health tech, where we heard from the experts about opportunities, challenges, and routes to the Indian market.

In this quarterly report you will find information on upcoming events in India in the healthcare space, and an insightful case study of TPP, a technology company in the healthcare sector that recently joined high-level delegations to India, including with the Prime Minister's mission. TPP recently joined a partnership that will launch primary health centres in India.

I hope that you will find this report interesting, and please do feel free to send us your comments.

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**In Focus: Indian Health Tech**

The Indian healthcare sector presents many opportunities for UK companies in areas beyond primary healthcare, which has often received the greatest attention. Health technology is a segment of growing importance, forecasted to be worth US\$ 11 billion by 2020 and growing at double digit rates. Key areas in health tech include tele-health, and internet and electronic medical records, to name a few.

*Healthcare India 2013*

With an interest to learn more about these opportunities, last week the UKIBC, in cooperation with BT and ABHI, hosted an event focusing on India's healthcare sector and health tech in particular. The event provided attendees with a very clear overview of India's healthcare market and a comprehensive view of the challenges that can be encountered. Speakers also discussed ways to enter the market successfully.

Mr George MacGinnis from PA consulting gave an insightful presentation with a profile of India's healthcare sector. Statistics show an urgent situation, with a very significant burden of disease and large proportions of the population who remain untreated. As George mentioned, a recent study revealed that 47% of diabetics in India do not receive treatment.

India is a growing market, with increasingly more access and provision of sophisticated treatments. In fact, medical tourism is a rapidly growing sector. However, most of the expenditure on health remains as out-of-pocket: current public expenditure

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is only 1.1% of GDP, and 70-80% of the total is out of pocket. This presents opportunities, particularly for innovative solutions in healthcare provision. Mr MacGinnis highlighted some of the areas where the UK can explore opportunities in Indian healthcare, such as:

- Affordable technologies
- Public-private partnerships to deliver innovative care
- Innovation in primary care including IT enablers
- Education, Professional development & Governance

A remaining concern however, is the fact that India is indeed a challenging marketplace. It is highly fragmented and there are complex regulatory and IP frameworks. Local partnerships can therefore be very useful to navigate through such complexities.

If you wish to learn more about how the UKIBC can help you connect to opportunities in Indian healthcare, please contact [Radhika.pandey@ukibc.com](mailto:Radhika.pandey@ukibc.com).

## Market Update

### **UK Intellectual Property Office launches IP toolkit for India**

*By Anshika Jha, Senior Intellectual Property Liaison Officer, UK Intellectual Property Office, British High Commission, New Delhi*

The UK Intellectual Property Office, working alongside Indian partners, has developed and launched an IP toolkit to help support the management of intellectual property in Indo-UK research collaborations. The toolkit aims to facilitate increased levels of productive research collaborations between the two countries by providing model agreements and guidance on issues such as IP ownership, licensed or assigned agreements, exclusive licences and dispute resolution. The toolkit will potentially be very useful for IP practitioners, academics and businesses working on cross-border R&D collaborations between the UK and India.

To read more about the UK Intellectual Property Office toolkit and consult the model agreements, [click here](#).

### **UKIBC Roundtable on opportunities in India and Oncology summit**

*By Ashish Mehta, First Secretary, UKTI Mumbai*

On the 10<sup>th</sup> of June, the UKIBC held a roundtable with Ashish Mehta, First Secretary, from UKTI Mumbai. The roundtable was attended by 6 delegates from companies across the healthcare and life sciences spectrum, all interested in the India opportunity. Apart from answering specific questions from companies regarding their India entry, Ashish was in the UK to promote and recruit companies for three upcoming events in the life sciences sector in India:

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*The UK-India Oncology Summit at the back of the Indo British Health Initiative*

This event will focus on everything related to the Oncology space and promote opportunities for collaboration between the two countries, from research to delivery. This event will also have a delegation going to India (1-8 Sep), visiting Mumbai, Bangalore and Chennai.

*The CPhI in Mumbai*

UKTI is proactively working to plug supply chain gaps in Indian Pharma and generic manufacturers. This year they aim to bring chemical, tech transfer and research focussed companies to work more with India. The event CPHI will help deliver these objectives as the leading pharma event in India, to be held in Mumbai from the 3<sup>rd</sup>-5<sup>th</sup> of December. For more information, visit:

<http://www.cphi-india.com/>

*Bangalore India Bio*

India Bio is a large biotech-focussed event in Bangalore which will take place in February 2014. UKTI is also in the early stages of planning a delegation for this event. For more information, visit: <http://www.bangaloreindiabio.in/>

For more details about any of these events, please get in touch with Ashish Mehta at [ashish.Mehta@fco.gov.uk](mailto:ashish.Mehta@fco.gov.uk). First Secretary - Trade and Investment, UKTI, Mumbai.



**Investment Update**

**UK-India cooperation in healthcare growing**

As was reported in a piece by [The Hindu Businessline](#), UK healthcare is eager to partner with India in achieving low-cost, high quality care. Realising the potential in this market, the sector is witnessing growing activity. In May, a UK health business delegation to India was led by Kenneth Clarke, British Cabinet Minister and trade envoy, who also attended the Indo-UK health conference hosted by the CII.

In another good example of cooperation in the healthcare space, [India and the UK signed a MoU](#) on strategic and technical cooperation in the health sector. This follows the signature of an overarching health agreement that India and the UK signed in Geneva at the World Health Assembly recently.

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**Amway invests £44 million in new plant near Madurai**

Amway, the direct sales giant, recently announced [plans to invest in a new manufacturing plant](#) in India. The facility will be the firm's second overseas facility after China, and is expected to be completed by 2015. The new plant is planned to have nine production lines, including nutrition and oral-care, with installed capacity for 1.2 billion tablets and softgel, 60 million tubes of toothpaste, and several other cosmetic products.

**Case Study: TPP**

[www.tpp-uk.com](http://www.tpp-uk.com)

TPP is a technology company in the healthcare sector currently exploring opportunities in a number of international markets. The company's successes with the NHS in the UK have provided great examples of transformational healthcare, which can be adapted to any health economy in the world. TPP was one of just three technology UK companies taking part in the Prime Minister's delegation to India last May, and earlier this year, the company secured a partnership with Brit Health, a consortium of GPs, who are launching a group of primary health centres across India.



**1. Please give us a brief description of your business and your product offering.**

TPP are a UK based IT company, dedicated to delivering world class healthcare software through our innovative product, SystemOne. Our philosophy is to join up healthcare across communities based on a single patient record ethos, improving access to clinical data and empowering patients to take part in their care. We are known for our outstanding achievements in the UK, providing electronic patient records on a single instance database for nearly 30 million patients.

After 15 years of success in the UK, we are looking to expand our offering to deliver connected care to new markets abroad, tackling global problems like the rise in non-communicable diseases and ageing populations. We believe we are the only software company in the world to offer an integrated EPR across all health settings.

The SystemOne database is now one of the largest real time healthcare databases in the world. The rich clinical data available has facilitated research projects in the UK. We also offer an infrastructure model to connect existing systems already in use. This allows all data to be stored in a central repository to create a unified health record from disparate systems.

**2. When did you first enter the Indian market? Can you please describe your entry strategy?**

We are collaborating with Brit Healthcare, a consortium of GPs from the UK, on the launch of numerous primary care centres in India. The first centre opened in February 2013 and is set to provide health services to more than 25,000 patients in the Greater Noida region.

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We have adjusted our market entry strategy for India to be focused on two main methods:

The private sector in India makes up a large percentage of the market; hence we are currently working closely with a number of private providers to deliver SystemOne to smaller clusters of health centres.

There are also wider government programmes set out by state and central governments. We are keen to get involved in these programmes and feel we are able to advise based on our experience with the NHS.

**3. What motivated your business to foray into India?**

From initial discussions, we identified that many of the health issues that exist in India are similar to those in the UK. These include the monitoring of child health and maternity data, hospital management and the rapid rise of non-communicable diseases such as diabetes. In the UK, SystemOne is an advanced system for recording all clinical and administrative data in any health setting. It has transformed the way in which patient care is delivered, and we feel that there are patients across the world who could benefit from our innovative technology.

We have a strong relationship with UKTI and the UKIBC who have introduced us to key people in India. We were then personally invited on a trade mission led by Prime Minister David Cameron showcasing the 'Best of British' companies.

Following the trade mission, we have been on several visits to the country. We have seen how passionate the people we have met are about changing healthcare for all Indian citizens. This has motivated us further to pursue opportunities in the country.

**4. What adaptations did you make to meet the intended Indian market? How did you localise your global brand?**

There were some minor changes that we made to the system to accommodate the privatised model of healthcare in the country, for example, the concept of payment systems. We understand that there is no 'one size fits all' model for everyone. Each country has different aims and objectives for their citizens.

**5. What is your candid view on future opportunities in India?**

There are great opportunities for British businesses in India. The market is thriving and is open to looking at companies who are exemplars in their respective industries. We are keen to build long term partnerships with key stakeholders in the country and continue producing innovative technology for the benefit of India's citizens.