+HBI 2019

HEALTHCARE BUSINESS INTERNATIONAL 2019

QUALITY, INNOVATION, COST:

Squaring the Healthcare Circle

QEII CENTRE

April 8-10, 2019

Queen Elizabeth II Conference Centre, Westminster, London SW1P 3EE

+HBI POLICY SUMMIT

Monday, April 8

In association with

McKinsey&Company

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BUSINESS INTERNATIONAL
Covering private healthcare, care + outsourcing internationally

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HBI 2019 - the only CEO-level event to bring together the sector globally

CEOs and investors in for-profit health care operators have huge opportunities over the next decade. There are also many challenges. To maximise revenue and profits operators need to:

- ☑ **Execute well on M&A**
- ☑ **Build a culture that delivers quality**
- ☑ **Build brands that deliver**
- ☑ **Incorporate AI and digital health into service offerings**
- ☑ **Build international businesses**
- ☑ **Recruit and retain the right people**

HBI 2019 focuses on these challenges. Whatever sector you are in, and whether you are an operator, an investor, a supplier or an advisor, you will find huge relevance in our programme.

STATISTICS FROM 2018:

Over 600 delegates in 2018

Over 160 investors attended

50 countries

44% CEO or equivalent

95% CEO, CXO or senior management

Click here to see what delegates say about this event

What's new in 2019?

HBI 2019

100% relevance – We've redesigned the programme to ensure you can attend sessions which are completely relevant to your business right through the event!

Policymaker sessions – Join us on Monday April 8 for a forum where policymakers look at the impact of digital health and telemonitoring on healthcare systems and payments.

More on digital health and AI – We look at how innovators are combining physical and digital services.

More networking – Our awards dinner is now a buffet, leaving you free to network with far more people. And we have a better networking app.

More sub-sectors covered – New this year – post-acute rehab, veterinary, primary care, cardiology and oncology!

WHY SAY **YES**

We understand just how hard it is to get time out to attend a two day event! We have taken this into account in putting together this year's content. The agenda brings together the best speakers to look at the burning issues you face today.

HERE ARE JUST SOME OF THE REASONS WHY YOU SHOULD ATTEND:

Find new partners meet over 160 investors and 330 major operators

Understand trends in the sector and how they will affect you

Identify new markets and opportunities

Understand AI and digital health and their impact on your business model

Analyse the landscape of the industry nationally, regionally and globally

Get practical advice on how to best finance new projects

WHO SHOULD ATTEND

HBI 2019

Investors
Private equity, institutional investors, REITs, fund managers, family offices

Operators
CEOs and CXOs from private hospitals, nursing homes, medicalised homecare, dentistry groups, diagnostic laboratories, cosmetic surgery groups, psychiatric groups, outpatient networks, imaging services, ehealth and ophthalmology providers

Advisers
Lawyers, consultancies, surveyors, investment banks/M&A boutiques

Suppliers
IT providers, medtech, pharma

HBI 2019

HEALTHCARE BUSINESS INTERNATIONAL

MONDAY, APRIL 8
HBI Policy Summit + Reception

TUESDAY, APRIL 9
HBI 2019: Day One

WEDNESDAY, APRIL 10
HBI 2019: Day Two

11:00 – 18:00

Join us on Monday, April 8 for a forum where policymakers look at how digital health and telemonitoring will force the redesign of healthcare systems and payments over the next decade. What will this mean for your business and its prospects?

Click here to see the HBI Policy Summit

19:00 – 22:00

Welcome reception

The HBI cocktail party the evening before the conference has become a real tradition. Hundreds of delegates come in off flights from around the world to meet old friends and make new ones. It is also a chance to attend break-out sessions on specific themes.

HBI 2019

QEII CENTRE

TUESDAY, APRIL 9
HBI Policy Summit + Reception

TUESDAY, APRIL 9
HBI 2019: Day One

WEDNESDAY, APRIL 10
HBI 2019: Day Two

9.00 - 09.30

PLENARY SESSION

What is REALLY possible in AI, digital health and integrated care?

Prof. Ran Balicer, Director, Innovation Division, Clalit Health Services & Founding Director, Clalit Research Institute

Who better to answer that question than Clalit, an integrated payor/provider with complete electronic medical records going back over 15 years covering 4.5m people, over half the Israeli population? Here Ran shows how Clalit has deployed AI and digital health and developed really effective data-driven integrated care. What does all this mean for outcomes and costs (hint: medical inflation in Israel is around 1.3%). And what are the lessons for payors and providers in less advanced health care systems?

9.30 - 10.30

Plenary Discussion

A panel of payors (NHS, statutory insurers, long-term/elderly care and private medical insurers) on how they see the for-profit sector. What do they like? What do they dislike? What new payment mechanisms will work, where and when?

Penny Dash, Senior Partner, McKinsey Penny leads McKinsey's European healthcare work and has deep expertise in redesigning healthcare and payor strategies in both public and private sectors. *Joris van Eijck, Director of Care, Menzis* One of the largest statutory insurers in the Netherlands, Menzis is pioneering value health and innovation. *Anthony Cabrelli, Senior Vice President, UnitedHealthcare, part of UnitedHealth Group*. Having previously worked for Bupa for 20 years and currently charged with developing new markets for UHC outside of the States, Anthony has many years' experience developing new insurance businesses globally. *Sonja Wehsely, Head of Strategy & Government Affairs, Europe, Middle East & Africa, Siemens Healthineers.*

10:30 – 11:00

Networking Break

Using our sophisticated networking app, you can pinpoint precisely who you want to meet at this session.
This is your opportunity to link up with potential investors, investments or advisors.

Sector streams

After a sector overview presentation, CEOs from several operators present case studies on a range of issues.

11:00 – 12:00

Private Hospitals

Moderated by:
Max Hotopf, Founder & Chairman, Healthcare Business International

The future of for-profit hospitals
Dr Ronnie van der Merwe, CEO, Mediclinic International plc
Mediclinic, one of the largest international healthcare service providers, operates acute hospitals and ambulatory facilities in Southern Africa, Europe and the Middle East and across a wide range of reimbursement and clinical business models. Here Ronnie looks at why global operators have emerged, the benefits and challenges that scale and broad operating experience brings to the Group, along with future opportunities for international expansion and across the continuum of care.

Integrated care and reaching lower income groups
Dr Shrey Viranna, CEO, Life Healthcare
Having aimed for high quality and cost-efficiency, private hospital groups are looking for their next evolution. Here Shrey talks about integrated care and outpatient models. He also looks at how groups like Life can better serve a spectrum of income groups using the airline model as an analogy.

Continues...

Homecare Models

This session explores various models for delivering care to the home ranging from high acuity to domiciliary care. How can operators monitor and deliver quality? What new reward models are payors adapting?

Moderated by:
Eilert Hinrichs, Partner, L.E.K. Consulting

Panelists Include: *Gustavo Fodrini, CEO, Palcare*
Argentinian homecare provider Palcare is positioning itself to be a one-stop-shop for chronic and palliative care, with recent expansion into Ecuador. Gustavo discusses how Palcare is looking to lead the consolidation of the homecare market in Argentina and replicate its model elsewhere.
Martin Jones, Managing Director UK, Home Instead Senior Care
Martin discusses the benefits and limitations of Home Instead's national franchise model, which has seen it expand from the U.S. into seven European countries as well as to Australia, Japan, China and Canada.

Imaging Services

The CEOs of the three largest imaging services groups in EMEA discuss the sector. The last decade has seen the emergence of major imaging chains. Can they evolve to offer a broad range of outpatient and primary care services. What will be the impact of teleradiology and AI on their business models? How likely are public hospitals to outsource to for-profit players?

Moderated by:
Rachel Lewis, Reporter, Healthcare Business International

Panelists include: *Mark Chapman, International CEO, Alliance Medical Group*
Anchored in the UK and Italy, Alliance Medical operates across much of Western Europe working in the public and private sectors and pioneered the introduction of PET-CT scanners in the UK.
Giuseppe Recchi, CEO, Affidea
With extensive experiance in PPPs, pan-European group Affidea offers diagnostics and cancer treatment in 15 countries and is moving further into the general outpatient sector.
Jos Lamers, CEO, Unilabs
The Pan-European lab group has the largest imaging business in the Nordic and is pioneering teleradiology.

12:00 – 13:00

For-profit hospitals in Europe - the Future?

Pascal Roché , CEO, Ramsay Générale de Santé

Political hostility and falling tariffs mean that for-profit hospitals have had a tough time in much of Europe. Here Pascal, who as well as running France has a wider European remit, looks at what is really happening at ground level and at the sort of partnerships which can be forged. He goes on to look at opportunities for hospitals to extend into outpatient, rehabilitation and speciality care.

From fragmentation to Modicare – India under the microscope

Dilip Jose, Managing Director & CEO, Manipal Hospitals

With a focus on affordable care and over 6,000 beds across India, as well as a world-class teaching arm, Manipal is one of India's leading hospital groups. Dilip shares his insights on the Indian private hospital market and considers how Modicare is likely to reshape healthcare in the region – and where Manipal will fit into this new landscape.

Does the German hospital market still have chances?

Hafid Rifi, CFO, Asklepios

At over €21bn, Germany is the largest and most sophisticated for-profit hospital sector in Europe. Here Rifi looks at how Asklepios, one of the top two players with 2017 revenue of €3.3bn sees the market.
How do legal and political regulations affect the market? Are there any growth opportunities? Hafid Rifi explains how Asklepios faces the challenges and what the future may look like.

Brand and Quality

There is a trend from brands focused on individual doctors or on the local reputation of a specific facility to the growth of powerful corporate brands based on the delivery of better, more high quality service (B2C brands). Payors and policymakers are also increasingly aware of differences between operators (B2B brands). How do you build such brands, where do they work best and what are the limits to brand promise?

Building brands that deliver

Justin Ash, CEO, Spire Healthcare Group

Unusually, Justin had a background in retail before becoming first CEO of Oasis Dental Care (sold to Bupa in 2017). He has strong views on brands, health care and the development of the private pay market.

Alex Zimmerman, Head of Marketing, Siemens Healthineers

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Dentistry

Pan-European and global dentistry groups are emerging and some markets, such as the UK, Sweden and Belgium, have been consolidated. In emerging markets heavily branded national chains are emerging. What advantages do big dentistry groups have over small operators?

Moderated by:

Tobias Koesters, Partner, L.E.K. Consulting

Panelists include:

Tom Riall, CEO, MyDentist

IDH Group is the largest vertically-integrated dental provider in Europe. Made up of mydentist, a network of more than 600 dental practices, and Dental Directory, one of the country's largest dental suppliers in the country, IDH Group is going through significant changes as it seeks to shape the future of dentistry in the UK. Tom will discuss the challenges in dentistry, the strategic direction of IDH Group, and the opportunities for the future.

Lars Armback, Group Chief Dentist, Colosseum Lars is responsible for dentistry quality and standards across Colosseum's business which operates dental chains in eight countries across the Nordics, Germany, Switzerland, Italy and the UK. How do you build a common corporate culture and standards across countries with very different payor and regulatory structures?

Pieter Lathouwers, CEO, Dentius Dentius is a fast-growing association of dental practices in Belgium where the market is beginning to consolidate.

Vikram Vora, CEO, Sabka Dentist

Vikram founded Sabka (formerly Mydentist) in 2010 and since then it has grown to nearly 100 clinics across five cities and is one of the largest chains in India.

13:00 – 14:00

Networking Lunch *Hosted by*

Medical Properties Trust

Sector streams

After a sector overview presentation, CEOs from several operators present case studies on a range of issues.

14:00 – 15:00

What really works in B2B Digital Health?

Here we look at three case studies where digital health can be shown to be delivering real value. A panel discussion looks at how the main sectors are likely to deploy digital health in the next five years.

Panelists include:

Magnus Liungman, CEO, Doctrin

Swedish start-up Doctrin wants to radically improve healthcare, by helping providers to intelligently digitalise the patient journey. Their platform is serving over 1 million patients and customers include Capio and Praktikertjänst, two of Sweden's largest providers.

Andy Fischer, CEO, Medgate

Since 1999, the Swiss telemedicine provider Medgate has been treating and triaging patients in managed healthcare systems, saving insurers between 15-20%. Medgate uses digital options and provides easy access to medical care of highest quality anytime and anywhere. Today, Medgate is also present in South East Asia, the United Arab Emirates, Australia and Eastern Europe.

Dr Snehal Patel, Co-Founder & CEO, MyDoc.

Six-year old Singaporean digital platform MyDoc has positioned itself as a one-stop-shop for insurers and corporates to provide GP and pharmacy consultations, prescription and other services to their customers and employees. Now operational across Asia, it has benefited from the great move from out-of-pocket to insurance systems.

Opportunities in Oncology

This sessions explores how and where oncology is opening up to the for-profit sector across Europe and Emerging Markets. It also highlights the impact of powerful new diagnostic platforms and looks at how they will shape treatment and delivery. The panel brings together an expert consultant, major new platforms (GE/Oxford AI Consortium & GE/EMRAD) and two large international operators, HCG and GenesisCare, who together are already delivering treatment across six countries in three continents.

The shape of oncology to come

Michael Sandhu, CEO, RemediumRT

In this short overview Michael looks at where and why the for-profit sector will play across Europe and main emerging markets. He goes on to look briefly at how patient pathways and experience will change and the move to outpatient.

Oncology: The new platform

Prof Dr Mathias Goyen, Chief Medical Officer, GE Healthcare Europe

GE Healthcare is working with the Oxford AI Consortium (lung cancer) and EMRAD (breast cancer) to create a new way to predict the most effective treatment for an individual by applying data analytics to in vivo and in vitro and medical records as well as integrating data from electronic medical records, medical best practices and the latest research. Smart algorithms looking for insights in terabytes of medical information will help physicians better serve their patients with earlier diagnoses and customised treatment plans.

Panel Discussion:

This will bring together two major operators: GenesisCare and HCG who deliver radiotherapy, surgery and chemotherapy in Australia, India, Ireland, Kenya, Spain and the UK, together with GE to focus again on the real opportunity. What will cancer care look like in 3-5 years time? How will 5-year survival rates change? What is the shape of the opportunity and the business models that will deliver it?

Dr Ajaikumar, CEO, HCG Group
Aldo Rolfo, Executive Manager – Europe, GenesisCare (Australia, UK, Spain, Ireland)
Prof Dr Mathias Goyen, Chief Medical Officer, GE Healthcare Europe
Michael Sandhu, CEO, RemediumRT

15:00 – 17:00

Elderly Care

Demand for residential nursing home places will explode across Europe and Emerging Markets, although the state, particularly in northern Europe, is doing its best to limit it. Meanwhile, assisted living, day centres, homecare and a range of other options are developing. Here CEOs of major elderly care operators look at how they see markets and business models changing the delivery of elderly care. What impact will new technology have on service delivery?

Moderated by:
Arnaud Sergent, Partner, L.E.K. Consulting

Creating continuous care
Sophie Boissard, CEO, Korian
Europe's leading senior care provider Korian is filling the gap in the "step-down" intermediate care market. What are the main opportunities and threats for its business model in this area? And how do the issues raised by policymakers differ in each country?

Innovation across a wider care spectrum
Yngvar Tov Herbjørnssønn, CEO, Norlandia Care
Here Yngvar explores the advantages of offering a wider care spectrum from homecare through to rehabilitation as well as residential nursing homes and even hospital hotels. He gives his views on the step-down market in Scandinavia. He then explores Norlandia's soft innovations which have enabled it to halve drug use for elderly residents, provide palliative care and new work methods which improve standards and outcomes. He also looks at how Freedom of Choice is affecting the market.

Low-cost, good quality
Dr Sanjeev Kanoria, Chairman, Adivinia Health Care
What do you need to prioritise in order to run a low-cost care home chain without losing quality? Sanjeev discusses the issues and how he sees the sector evolving.

From mom-and-pop providers to specialist care
Costis Prouskas, CEO, Aktios
What are the opportunities in a highly fragmented and relatively unregulated elderly care market like Greece's, where mom-and-pop providers and live-in carers are still the mainstay of provision? Costis, from Greek dementia care specialist Aktios, shares his views on the changes and challenges ahead.

Outpatient Networks

This session looks at the growth of outpatient players – what are their business models and how fast are they growing?

Building a value-based outpatient ecosystem
Dr Hendrik Hanekom, CEO, Intercare Group
Over 20 years, the Intercare Group has undertaken a conscious journey towards becoming a value-based healthcare organisation. Now encompassing polyclinics, wellness centres, day hospitals, sub-acute and rehabilitation facilities and specialized hospitals, the group is an example of a diversified yet integrated outpatient ecosystem. Through its strategic partnership with Mediclinic, one of the largest acute hospital groups in South Africa, Intercare has been able to create a truly unified care continuum which reaches beyond the outpatient setting while keeping it at its core. Hendrik will provide unique insights into how Intercare leads the change in both care delivery and funding models and as a result delivers significant value to patients, doctors and insurers.

The evolution of the Chinese outpatient sector
Roberta Lipson, CEO & President, United Family Hospitals (UFH)
Since its inception in 1997, UFH has grown into a multi-city, integrated hospital system in China, providing premium healthcare in state-of-the-art facilities. Roberta gives an overview the Chinese outpatient sector and how it is likely to develop over the next 10 years – and explains how UFH is developing outpatient activities within its hospital network.

Embracing technology in India
Rajit Mehta, MD & CEO, Max Healthcare
Leading Indian integrated private healthcare group Max Healthcare offers a full suite of services. Here, Rajit talks about outpatient networks in India and how Max healthcare is leveraging technology to grow outpatient opportunities in the next 10 years.

Delivering affordable healthcare in Mexico
Juan Moctezuma, Co-founder and CEO, Reina Madre
Founded in 2015 and based in Toluca and now also in Mexico City, Reina Madre provides affordable ObGyn services using an innovative business model that enables it to cut consultation costs by 30-50% compared to private competitors. Juan examines the outpatient market in Mexico and shares his views on the opportunities he expects to see in the next decade.

AI and big data

Better, lower cost diagnosis, more effective treatment and the ability to strip out massive wastage. AI and big data promise all of this and more. Operators and payors look at what the technology is delivering today and what will be achievable in 3-5 years. What are the implications of this for corporate strategy?

How do you make money in health care using big data and AI?
Nicolaus Henke, Senior Partner, McKinsey & Company, Global leader, McKinsey Analytics.
As an investor or CEO how do you maximise the impact of big data and AI on your health care business over the next three years? Nicolaus looks at the tangible ways in which these new technologies will add value to your business either operationally or on exit.

Presentation title tbc
Yan Beynon, President of Digital Services, Siemens Healthineers

16:00 – 17:00

Fertility

Although at national level fertility remains unconsolidated, it is a sector where we have seen the rapid growth of international chains such as NMC, Vertus and IVI. How much real advantage do these chains have against local players? Where and how do brand, technology leadership and price collide? We hear from a panel of CEOs from the major operators.

Moderated by:
Katya Zubareva, Partner, L.E.K. Consulting
Panelists include:
Richard Banks, European Managing Director, Virtus Healthcare Virtus Health was the first publicly listed fertility business in the world and now has clinics in Australia, the U.K., Ireland and Singapore, with plans to expand further into Europe. Currently Virtus has clinics in Denmark where they are a significant private provider having a clinic in Copenhagen and another in Aarhus.
Gleb Mikhailik, CEO, AVA-Peter
With 20 facilities, AVA-Peter is the largest IVF clinic chain in Russia with ambitious plans to expand across the country.
Dr Ajaikumar, CEO, HCG Group.
India's largest cancer care provider also owns the fertility group Milann, which is expanding nationwide as well as planning to open a centre in Oman. It aims to provide affordable, value-based fertility treatments to patients.

17:00 – 17:30

Networking Break

Using our sophisticated networking app, you can pinpoint precisely who you want to meet at this session. This is your opportunity to link up with potential investors, investments or advisors.

Investor regional and sector landscapes

17:30 – 18:30

DACH

Moderated by:
Dr Alexander von Friesen, Partner and co-head Mergers & Acquisitions, PWC Germany
The 100m population of wealthy German-speaking Europe is by far the largest market for health care services in Europe. What will be the trajectory for future consolidation, who are the players and what is the opportunity?

Panelists include:
Stephan Rau, Partner, McDermott Will & Emery. Stephan focuses his practice on mergers and acquisitions (M&A) transactions and regulatory advice in the health and life science sector. He is the head of the Firm's Health Law Practice Group in Europe.
Stefan Eschmann, CEO, KMG Kliniken plc KMG is one of the top ten hospital groups in Germany. The group is also active in the post-acute rehabilitation and the elderly care market. Stefan has a deep knowledge of the German health care market and formerly worked for Fresenius Helios.
Ralph Hefti, CEO, MedEuropa
Ralph was previously CEO of Affidea in Switzerland and is now building a pan-European radiotherapy chain backed by Phillipe Jacobs and Telemos Capital.
Philipp von Hammerstein, Health & Care Partner, Gimv
Based in Gimv's Munich office, Philipp has extensive expertise in M&A and deal advisory in the DACH healthcare market.

South Asia

Lack of private medical insurance has forced operators to price services to consumers' ability to pay. This had led to the development of some fascinating low cost models. Meanwhile, the hospital sector is developing outpatient specialist chains and assessing the opportunity in tier 2 and 3 cities. In India, Modicare could also be an opportunity. But all this begs the question of how many South Asians can really afford quality healthcare services? Discussion panel of investors, operators and advisers.

Panelists include:
Dilip Jose, Managing Director & CEO, Manipal Hospitals
India's third largest hospital group is one of the pioneers in affordable, quality healthcare, with multi-specialty hospitals across India, as well as more recent acquisitions in Malaysia and Nigeria.
Vikram Vuppala, Founder & CEO, NephroPlus
India's largest dialysis network - NephroPlus runs 150 clinics in 90 cities across 18 states, and through its focus on lean operations, massive scale and standardised clinical protocols, has made quality dialysis accessible to Indian dialysis patients.
Rajit Mehta, MD & CEO, Max Healthcare
With 14 hospitals across North India, Max Healthcare is one of the country's leading integrated healthcare providers.

Middle East and North Africa

Historically, the wealthy have left MENA for treatment abroad. That is no longer the case. GCC states are building massive for-profit capacity on the back of mandatory insurance schemes. Saudi Arabia promises to radically outsource almost everything. North Africa has seen the growth of regional players in labs and hospitals. And everyone looks to Turkey as an example of how to best build decent health care from scratch. But what is the real quality of care in MENA? Will overtreatment lead to a backlash? Discussion panel of investors, operators and advisers.

Panelists include:
Helmut Schuehsler, CEO & Chairman, TVM Capital Healthcare
TVM Capital invests in healthcare businesses across the Middle East and North Africa, as well as Asia.
Dr Ronnie van der Merwe, CEO, Mediclinic International plc.
Beyond Southern Africa and Europe, Mediclinic is also a market leading operator of private healthcare facilities in Dubai and Abu Dhabi with seven hospitals and a network of 22 clinics.
Dr Osama Elhassan, Director of e-Health Section at Health Data & Information Analysis Department, Dubai Health Authority
An expert in healthcare information systems and leader in the roll-out of e-health at the DHA, Osama shares his perspective on the future of healthcare in the MENA region.

Nordic Region

Moderated by
Pia Hardy, Partner, McKinsey & Company

Finland and Sweden show the future for the sector, offering citizens great welfare packages, often delivered by the for-profit sector. Its large operators are sophisticated players who offer a vast range of services to counties and municipalities. They are also world-leaders in the deployment of digital health.

Panelists include: ***Fredrik Gren, CEO, Ambea.*** Swedish social and elderly care provider Ambea is one of the largest care organizations in the Nordics. With the recently announced acquisition of Aleris care, pending clearance from competition authority, Ambea will be the largest care operator in the Nordics with leading market positions in Sweden, Norway and Denmark. The company has a strong focus on greenfield growth and digitalilzation and is traded on Nasdaq Stockholm.
Alexander Wennergren Helm, CEO, Aleris Healthcare. Aleris is one of Scandinavia's leading healthcare providers in primary care, specialist care and diagnostics, and has many collaborations with the public healthcare systems in the region.
Yrjö Närhinen, CEO, Terveystalo. Finland's largest private healthcare service provider Terveystalo offers primary and secondary outpatient healthcare services to corporate, private and public sector customers, as well as having a comprehensive digital platform for patients.

Russia and CIS

Moderatoed by:
Emmett Moriarty, Managing Director, Ennismore Advisory
Big quoted groups like Georgia Healthcare Group, MD Medical and European Medical Center have listed or are considering listing on the London Stock Exchange. And genuinely national chains are beginning to emerge in Russia. There are also big opportunities for the brave in Ukraine and Khazakstan. This panel looks at the market opportunities, how favourably governments view the private sector and at barriers to entry.

Panelists inlclude:
Andrey Yanovsky, CEO, Member of the Board of Directors, European Medical Center (EMC) EMC has eight clinics in Moscow and is one of the pre-eminent hospital systems in Moscow, covering 56 specialties. With JCI Accreditation, it offers the latest international protocols to patients and is considering an IPO in the next 12 months.
Ekaterina Timofeeva, Partner and Managing Director,The Boston Consulting Group Ekaterina is an expert in private healthcare advising operators and investors on market entry strategy, operations and M&A.
Michail Radutsky, CEO, Boris Clinic, Ukraine With estimated sales of £41m (HBI estimate) in 2017, Boris Clinic is the second largest private hospital in the Ukraine and offers a full suite of services to their national and international patients.
Yuri Leonov, CEO, KDL In 2012 the EBRD joined forces with private equity groups UFG and CapMan to buy Russia's third largest private laboratory chain KDL, which in 2017-18 has become the second largest one with annual revenue of 75mln USD, while medical testing identified as one of the fastest growing sectors in the region.

LatAm

Moderated by:
Maurício França, Partner, L.E.K. Consulting

European and US companies like UnitedHealth, Bupa, Fresenius Helios, Orpea and Unilabs have all bought operators in LatAm in the recent past with United making a huge multi-billion dollar investment in hospital chains in half a dozen countries. It is easy to see the attraction: governments are generally supportive, there is a fast-growing middle class and developed PPP and HMO models. But difficulties remain particularly around regulation and control of quality. This session looks at opportunities from Mexico to Argentina.

Panelists Include:
Gustavo Fodrini, CEO, Palcare
Argentinian homecare operator Palcare's roots are in the palliative care sector, but it is moving towards residential care - and expanding its model to other Latam countries.
Anthony Cabrelli, Senior Vice President, UnitedHealthcare Group. UHC sees Latin America as a new frontier and has been busy making big acquisitions there in the last six years - first in Brazil with Amil, and then with Banmedica in 2017, which operates in Chile, Peru and Colombia.
Juan Moctezuma, Co-founder and CEO, Reina Madre
Using Indian healthcare models as inspiration, Reina Madre is able to offer affordable private ObGyn services in Mexico. Juan shares his insights of the Mexican healthcare market.

18:00 – 19:00

Drinks reception
Hosted by Rothschild, this reception is the networking event of the year and a great opportunity to meet your fellow delegates.

Rothschild & Co

19:00 – 22:00

Buffet networking evening
The networking continues over a buffet dinner giving you a chance to network with new contacts and to meet old friends.

9:00 – 9:30

Investment Landscape

A detailed overview of M&A across Europe and Emerging Markets. What are valuations at a sub-sector level? How do they differ from country to country? Where are they heading? And who are the main types of buyer?

Health care services M&A and valuations - where now?
Hedley Goldberg, Managing Director, Rothschild & Co

The public markets have given health care services a rough ride over the last year and whilst M&A multiples have held up, many deals remain unconsummated. Here Hedley gives a detailed overview of regional and sub-sector valuations and M&A activity. Where are valuations heading and why? And how is the profile of acquirers changing?

9.30 – 10.30

Investing in Europe

This discussion panel looks in detail at investment strategies in Europe. Participants include specialist investors from private equity, listed companies, institutional investors and infrastructure funds

Moderator: ***Martin Henrichs, Managing Director, UBS***

Panelists include:
Stefan Drago, Partner Healthcare, PAI
Stefano joined PAI in 2005. Transactions include Atos Medical, DomusVi and Cerba Healthcare.

Ulrich Köllensperger, Partner, EQT Infrastructure
Infrastructure funds are becoming major owners of health care operators in EMEA. So it will be fascinating to hear from Ulrich. One of Europe's largest infra funds, EQT Infrastructure owns Charleston, a German nursing home group with 4,000 stationary care beds in 46 facilities in Germany.

Johan Liliiehook, Managing Director, Head of Healthcare EMEA, Blackstone
Johan has been involved with a number of health care transactions including recruitment firm Pulse Healthcare.

Andrea Ponti, Executive Partner and Founder, Global Healthcare Opportunities
Andrea founded GHO in 2014 to specialise in healthcare across Europe. Investments include Linimed, the big German intensive care clinic group. A former Goldman Sachs partner, he has over 30 years of investment banking experience.

Investing in Emerging Markets

These offer massive opportunities, but, all too often, very high valuations. The panel will explore values and where they are heading. What is the greenfield alternative? And what will be the impact of new players that combine digital and service offerings?

Panelists include:
Hareesh Nair, Managing Director, Fosun Healthcare Holdings Fosun is a Hong Kong-listed investment group (HKG: 0656), managing over US$80 Billion in assets across healthcare, wealth, and happiness related ecosystems. Fosun is experienced at investing in healthcare globally, including: China's Fosun Pharma and Sinopharm; India's Gland Pharma; hospital groups including United Family and Luz Suade; as well businesses across regions at the forefront of new medical therapies, health insurance, and health tech.

Chinta Bhagat, Executive Director, Investments, Khazanah Nasional
Chinta oversees Khazanah's holdings in IHH Healthcare, the largest emerging markets hospitals operator, and is an experienced healthcare investor and professional.

Abrar Mir, Founder and Managing Partner, Quadria Capital
Abrar is a strong advocate of bringing high quality healthcare at an affordable price to those that need it the most. He is leading a study on effective, scalable business models for low cost healthcare delivery and how these can be adapted across various developing countries.

Fernando Pereira, Healthcare Portfolio Manager, Patria
Fernando Pereira is the healthcare services portfolio manager of Patria Private Equity, the largest healthcare-focused private equity firm in Latam, with US$ 10 billion in AUM.

10:30 – 11:00

Coffee

HEALTHCARE BUSINESS INTERNATIONAL

Sector streams

After a sector overview presentation, CEOs from several operators present case studies on a range of issues.

11:00 – 12:00

Diagnostic Laboratories

Three sessions give lab groups and investors a clear view of the future:

Session 1: Where we are today

The for-profit lab market - threats and opportunities

Max Hotopf, chairman, Healthcare Business International

In a provocative presentation, Max looks at market size and forecasts for the lab sector across EMEA countries, India and China. What are the real prospects for growth from B2C, genetic testing and outsourcing? This will be followed by a lively Q&A session.

Session 2: Changing the payor and medical profession's mindset

In all countries what tests are carried out, and by whom, is best seen as a socio-cultural construct, rather than scientific rationality. Many tests that would add great value are not carried out. Many that have little value are executed and then ignored. And budgets for diagnostic testing are defined by history and politics, rather than any attempt to measure real utility.

Adding value by Breaking Barriers: How the lab can move to the forefront of healthcare

Savyon Amit, Head of Global Market Insights*, *Abbott Diagnostics

Savyon looks at Abbott commissioned research on the current role of labs and how it needs to change.

Discussion panel:

Jos Lamers, CEO, Unilabs

Savyon Amit, Head of Global Market Insights, Abbott Diagnostics

Psychiatry and Mental Health

Moderator: ***Dr Michelle Tempest, Partner, Candesic***

Heavily influenced and defined by local culture, mental health remains a taboo subject across many Emerging Markets. That taboo is lifting in Europe, but state payors often fail to support care. This session looks at how inpatient care is evolving, at the likely impact of digital offerings and the emergence of international groups.

Panelists include:

Zoe Blake, CEO, XenZone Group Founded in 2001, XenZone is the largest provider of digital therapy in England where 40% of 11-19 year-olds now have access to Kooth, its text based offering via contracts won with NHS organisations. Other offering cover adults and the privately insured.

Ole Andreas Underland, CEO, Incita Holding AS.

Norwegian psychiatric group Incita runs three nursing homes and 12 inpatient and outpatient facilities and is planning to open 10 more hospitals in the next three years.

Andreas Ludowig, Executive Director Hospitals, Schoen, one of the leading inpatient mental players in the German market, has developed MindDoc, a web-based solution giving online therapy both to new patients and online follow-ups to former patients. Andreas talks about MindDoc and also how the German psychiatric system is changing more generally.

Ophthalmology

The sector remains extremely fragmented, and yet we've seen the emergence of international chains, notabaly Aier, Optegra and several Indian chains. Growth rates should be high as the public sector outsources cataracts and as the middle-aged pay to surgically fix long-sightedness. But can national operators build real competitive advantage in unconsolidated markets?

Moderated by:

Victor Chua, Partner, Mansfield Advisors

Panelists include:

Dr Dirk Knueppel, COO, Artemis Eye Clinics

Artemis is one of Germany's two largest ophthalmology players, bought in 2015 by Montagu Private Equity.

Amaury Guerrero, CEO, Opty

The largest eye clinic chain in Brazil with 2018 revenue of $100m+, Opty is now looking expand across Latam, as well as entering the budget market.

Dr Peter Byloos, CEO, Optegra International

Ophthalmology group Optegra has dedicated hospitals and clinics in the UK, the Czech Republic, and Poland. With 25 years' experience in various healthcare sectors, Peter joined Optegra a year ago and shares his insights on the market and Optegra's direction of travel.

Investing in Property

Investors, in pursuit of steady returns and limited risk, are in love with the healthcare sector. How can operators best exploit this and what impact does divesting property really have on valuations? What is likely to happen to yields in the near future and how much appetite for risk do specialist investors have? What do good partnerships between opco and propco owners look like? This session answers all these questions and more.

Continues…

12:00 – 13:00

Session 3: The future

What tests are start-ups working on and what does this mean for the sector?

The future of testing

Jerome Thill, Deputy CEO, Cerba HealthCare

Cerba runs the largest for-profit reference lab operation in Europe. Here Jerome looks at the test pipeline, genetic and non-genetic, over the next 3-5 years. Where does he see opportunities and who will pay for the new tests? He also looks at the development of big data analytic platforms and what they are likely to achieve.

Reaching the Consumer and the Genetic Revolution

Daniel Hefel, VP Business Development, Commercial Excellence and eCommerce, Medicover

Medicover which owns Synevo and IMD, the Pan-East European and German lab group, sold lab tests through its online stores to +400,000 consumers in 2018, making it by the far the largest player in the online consumer market for lab tests in Europe. Here, Hefel looks at how this was achieved by understanding consumers and patients' needs. He goes on to look at how genetic testing will open up further growth opportunities and at the role of the doctor in interpreting complex test results.

Discussion panel:

Jos Lamers, CEO, Unilabs,
Savyon Amit, Head of Global Market Insights, Abbott Diagnostics
Jerome Thill, Deputy CEO, Cerba HealthCare
Daniel Hefel, VP Business Development, Commercial Excellence and eCommerce, Medicover

Post-Acute Rehabilitation

Essential if the patient is to fully recover, post acute care is often a Cinderella sector that is ignored and underfinanced, even in Europe. It is all but non-existent in most emerging markets. But the opportunities in this unglamorous sector are extraordinary.

Panelists include:

Helmut Schuehsler, CEO, TVM Capital (UAE)

TVM Capital invests in healthcare businesses across the Middle East and North Africa, as well as Asia.

Emmanuel Masson, CEO, Clinea (Orpea)

Clinea, part of Orpea, is the only Pan-European post-rehab platform and is active across France, Germany, Poland, Austria, Nederland, Portugal, Italy and Switzerland. Emmanuel is particularly involved in the group's move into outpatient and digital services.

Dr André Schmidt, CEO, Median Kliniken

André has led a team that has created the largest rehabilitation group in Germany and has now extended the patient pathway to cover outpatient centres and digital health apps thus increasing its reach and leading to better outcomes.

Paolo Migliavacca, CEO, Istituti Cinici Scientifici Maugeri

Italian private hospitals group Maugeri is leader in specialised medicine and rehabilitation. Paolo sees great opportunities in consolidation of the highly fragmented sector, and hospital partnerships for elderly acute care and rehab.

Political and Regulatory Risks

A bolt from the blue. All too often, new laws, regulations and political changes emerge unexpected. Here, McDermott Will & Emery, the law firm with the biggest global health care practice, presents its overview of the current situation across EMEA.

Hamid Yunis, Partner, McDermott Will & Emery &
Dr Stephan Rau, Partner, McDermott Will & Emery

This intriguing presentation looks systematically, sector by sector, at risk across the 10 main EMEA national markets. Where does politics and law present new opportunities? And what are the threats the industry faces?

Panel discussion with operators and investors analysing implications and solutions.

Panelists include:

Giuseppe Recchi, CEO, Affidea As the former chairman of Telecom Italia, Giuseppe has worked closely with government policymakers. Affidea's major customers are the public sector across 16 CEE and Southern European countries.

Procurement

Cutting procurement prices in Europe

Dieter Zocholl, CEO, InMEDiG

InMEDiG plans to launch a Pan-European ecommerce platform that enables operators to massively cut the prices they pay for medtech, consumables and pharma. This will be based on his work for big European operators such as Capio (launching the first Pan-European Healthcare Purchasing Project), Mediclinic/Hirslanden, Median, Ameos which found massive discrepancies of up to 5fold in the amount paid for the same product in neighbouring countries. Why is this? And what steps do companies need to take to reduce the difference?

Jens Knoblich, Director of Services, Median Group

As head of procurement and non-medical services at MEDIAN, Jens is in charge of over €200 million annually. He has been credited with revolutionising procurement at Median by eliminating decentralised purchasing and installing powerful IT systems to benchmark and control spending between clinics, delivering big savings. Driving patient satisfaction and increasing the level of quality while realising standards are the key fundamentals of all activities.

13:00 – 14:00

Networking lunch

Investor regional and sector landscapes

14:00 – 15:00

China

The government seems clear that it wants the for-profit sector to play an important role in the delivery of decent healthcare to its 1.2bn citizens. But huge problems remain. Chinese ciitzens are still extremely distrustful of for-profit players and payment models remain skewed to big pharma leading to over-prescription. Many Chinese groups have bought foreign expertise in Australia, Singapore and Europe. How will these be deployed in China? And what are the opportunities in elderly and post-acute care?

Panelists include:

George Schutte, Consultant - Hospital Commissioning & Management, Vamed
George has over 25 years experience in the private hospital management in South Africa for Mediclinic, the UAE as a consultant for several hospitals, and most recently in China for Vamed, where he is the Operational Project Leader and Consultant for the Unicare International private hospital in Haikou.

Roberta Lipson, CEO & President, United Family Hospitals (UFH). With more than 30 years' experience in the Chinese healthcare market, first as founder of Chindex (the hospital equipment distribution company) and then CEO of UFH - China's first and largest foreign-invested healthcare system, Roberta is both a true pioneer and expert in the Chinese market.

Saul Gitlin, Senior Director, Global Business Development - China - Mount Sinai
Mount Sinai is currently the largest healthcare system in the Greater New York City area. With many decades of experience in the Chinese market, Saul leads Mount Sinai's expansion in China, including administering Mount Sinai's recently signed long-term partnership with Taikang Insurance, which will provide clinical and management knowledge transfer services, training, and affiliate co-branding for Taikang's Xianlin Drum Tower Hospital in Nanjing, Jiangsu Province.

Sub-Saharan Africa

Indian and European groups have entered Africa in large numbers over the last few years. But Abraaj has struggled to fulfil its dreams for a $1bn investment in the continent's megacities, partly reflecting the lack of assets to buy. Given its poverty, what is Africa's real potential and risks? And how are new, tech-based business models backed by development banks faring?

Panelists include:

Teo Sarda, CEO, Sphera Healthcare
Sphera has rare Pan-African experience managing and running hospitals and large outpatient networks. Currently it has projects in Rwanda, Gabon and Angola, with plans to expand to Mali, Morocco, Madagascar and Senegal.

Dr. Shrey Viranna, CEO, Life Healthcare
As former CEO of Discovery, and having taken the reins at Integrated Hospital group Life in February, Shrey has a wealth of experience in the region.

Dr Stuart Bennett, CEO Healthcare, Family Office to UAE Royal Family Member
As an Emergency Physician (Military Surgeon) turned healthcare investor and operator, Stuart has a strong understanding of emerging markets healthcare with a particular focus on Sub-Saharan Africa. In his previous role as Head of Africa Operations at the Abraaj Group, Stuart led programs to screen and treat Non-Communicable Diseases including Diabetes, Hypertension and Heart Disease, the fastest growing health issue globally, killing 10 times more people per year that Malaria, HIV and TB combined.

Audrey Obara, Head of Healthcare, Swedfund
The Swedish state's development finance institution's African arm is currently focusing on healthcare investments in the region.

CEE & Turkey

Reasonably stable mid-market economies with a population of 120m, the CEE has seen the development of a substantial for-profit healthcare services sector over the past decade. More recently, a swing towards populist politics has left the sector vulnerable in Poland and Hungary. But there is plenty of potential in former Yugoslavia and futher privatisation opportunities in the Czech Rep. This session looks specifically at opportunities over the next five years across sectors as varied as elderly care, PPP and occupational healthcare.

Panelists include:

Dr Odrich Šubrt, CEO, Program Health Plus. Czech polyclinic Program Health Plus is one of the country's premium integrated healthcare providers, with a strong focus on eHealth.

Burcu Ozturk, CFO, MLP Care. Turkey's largest hospital group MLP Care, which runs the Medical Park chain, opened two new hospitals in 2018 and is looking to expand further though M&A acquisitions.

Mesut Goral, SVP Chief Operations Officer CEE and Turkey, Affidea
Mesut oversees Affidea's operations in 10 countries from Lithuania and Poland, to Greece and Turkey.

SE Asia

Major groups are forming in all the big economies, buouyed by a relentless rise in living standards and a general willingness of governments to engage with the for-profit sector. SE Asia is also home to the some of the fastest-growing outpatient and lab groups in the world. Across the region, operators are early adopters of new technology.

Moderated by:
Thalia Georgiou, Managing Partner, Healthcare Advisory – Asia Pacific, Asia Care Group

Panelists include:

Hareesh Nair, Managing Director, Fosun Healthcare Holdings
Hareesh is responsible for Fosun Healthcare Holdings investments across the Asia Pacific region.

Dr Snehal Patel, Co-Founder & CEO, MyDoc.
Pan-Asian platform MyDoc provides virtual managed care to the fast-growing standalone healthcare insurance industry and corporates in the region.

Dr Tan Jit Seng, CEO, Lotus Eldercare.
Jit Seng, from Singaporean start-up home care provider Lotus Eldercare, shares thoughts on the opportunities of the residential versus home care market in Singapore and beyond. What are the cultural and staffing issues, and how advanced is e-health for elderly care in the region?

United Kingdom & Ireland

Europe's largest private equity invested market, these obscure islands off the coast of Europe face an uncertain future and much higher costs after Brexit. Much hangs on whether governments are willing to reform unaccountable NHS organisations. In any case, a swing to private pay should fuel the for-profit sector. Big hospital and nursing home chains face a big squeeze and need to move to new and more efficient ways of delivering services.

Moderated by:
Max Hotopf, Founder & Chairman, Healthcare Business International

Panelists Include:

Sharon Lamb, Partner, McDermott Will & Emery. Sharon focuses her practice on health care transactions, investments and projects, as well as comprehensive health care regulatory advice. She has advised private and public health care clients for more than 16 years.

Sanjeev Kanoria, CEO, Adivinia Healthcare. Adivinia provides quality low-cost residential care for the elderly in the UK as well as a full range of home care services.

Dr Brian Donley, CEO, Cleveland Clinic London.
With nine hospitals throughout northeast Ohio, plus facilities in Florida, Nevada, Canada and the UAE, the London hospital is Cleveland Clinic's first foray into Europe. The new outpatient facility will open in 2020 in London, followed by a 200 bed inpatient facility in 2021. How does Brian see the UK market and what is Cleveland Clinic's USP?

Christian Dubé, Partner, August Equity.
Christian heads up August Equity's healthcare and education investments, which include Dental Partners, The Dermatology Partnership and Orbis Education and Care.

15:00 – 16:00	**DIgital Health. What works and what doesn't: operator perspectives** Digital health has the potential to transform services. But where and how does it really add value and what pitfalls have operators encountered? These frank presentations give you a clear idea of the experiences of some of Europe's most innovative groups. ***Anssi Hartiala, Business Unit Director, Mehiläinen***. Bought by CVC in May, Finnish health and social care group Mehiläinen is the largest private healthcare group in the country by revenue and oneof the most innovative in terms of digital offerings. ***Richard Sands, Group Strategy Advisor, Medicover*** presents on Medicover’s experience of using an AI-driven app to provide an initial diagnosis and patient pathway, and on substituting teleconsultations for traditional consultations. What are the lessons learnt and what has been the impact on customers and patients?

16:00

Conference ends

HEALTHCARE BUSINESS INTERNATIONAL

" For health care services, this is much better than the JP Morgan conference. The only trouble is that people like the content so much that it is hard to get them into meetings!"

Hedley Goldberg, Managing Director, Healthcare Services, Rothschild

" The biggest health investor conference. If you want to meet people this is where you come"

Mathias Loening, European Bank of Recontruction and Development

"I'm an Asian healthcare investor working across emerging markets. This is the one place which is a perfect sweet spot, everything I'm looking to get done, happens here. It is very global. I meet more top people from Asia than I meet in Asia!"

Chinta Bhagat, Kazanah Capital, Malaysia

" It's very good from a European point of view; it is a place where everybody can meet with good seminars, discussions and networking within the industry"

Annette Kumlien - COO - Diaverum Group

" The conference has been of an extraordinary quality. On very few occasions do you encounter material which can help you make business decisions. Healthcare Business International is of marvelous quality in terms of speakers, and exceeds my expectations in terms of knowledge, business models and opportunities "

Jaime Cervantes – CEO - Vitalmex, Mexico

" Excellent levels of networking with many people in senior positions"

Fredrik Gren, CEO, Ambea, Sweden

" An absolute must. A very balanced mix of providers, innovative disruptors and investors. All the staekholders are here."

Ilian Grigoriev, Darzelos Capital

" Very rare, very unique to find an event like this on services. A lot of people with great minds. Great for strategy"

Gildas Bonduelle, Head of Homecare, Linde, Germany

" I thoroughly enjoyed the conference. It was wonderful interacting with some of the delegates and learning from their perspectives."

Rajit Mehta, CEO, Max Healthcare, India

" Unique in the world in bringing together operators, payors and investors."

Carsten Belanich, Columbia Partners, USA

" Managed to cover a very broad range of subjects and provide good practical examples. A lot of very senior people came as delegates."

Jaime Santos, Luz Saude, Portugal

" A great quality conference! Astonishing list of delegates."

Andrey Mishakin, CEO, KDL, Russia

" A really special event. You meet people from other facets and streams of healthcare services from Europe and the rest of the world. Really insightful content, gave us new ideas and allowed us to test our own ideas."

Eng Aik Meng, TE Healthcare, Singapore

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