

Prague Sept 2004

Andy Black

Ambicentres Ltd.

Ambicentres Ltd.

New company to set up global
database of all Ambulatory Care
Centres.

Market review

Guide to International Best Practice

Message - Prague

1. England moves in one decade from zero to saturation in ambulatory surgical capacity.
2. Private sector takes a major position in treating "NHS" cases.
3. Next step is to increase capacity in "diagnostics."

England 1993

1st Purpose built NHS Ambulatory
Care Centre

Central Middlesex Hospital,
London

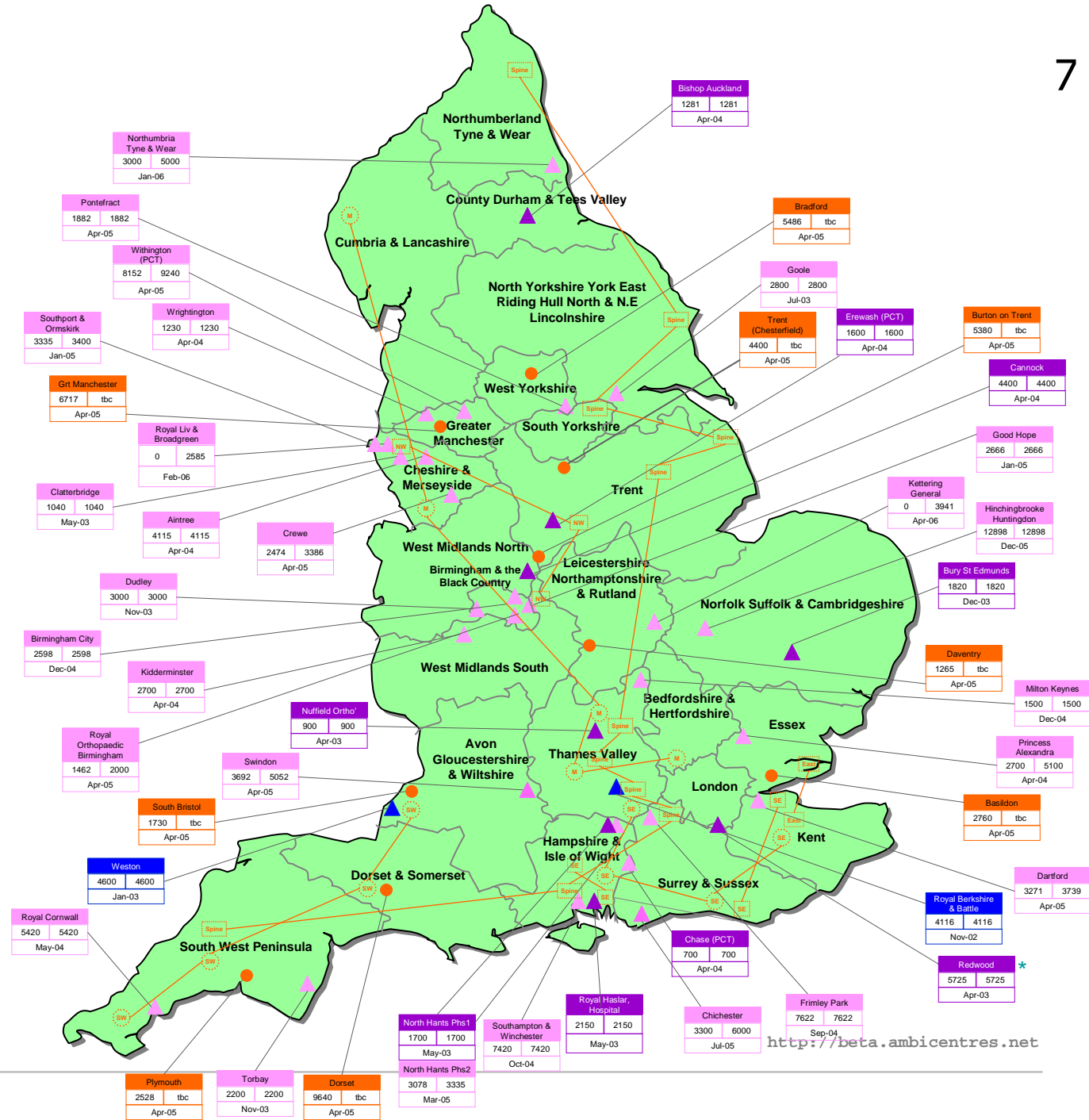


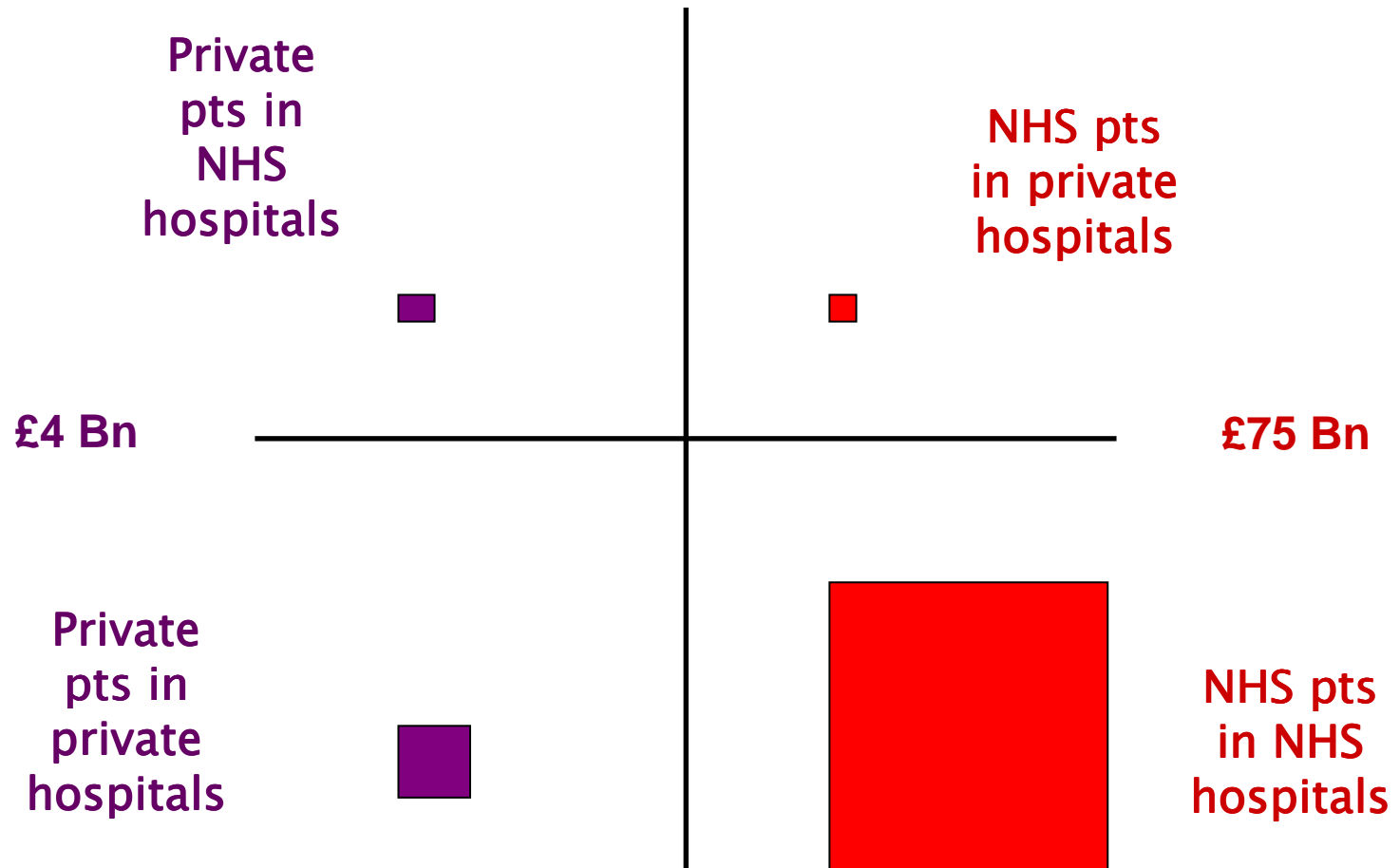


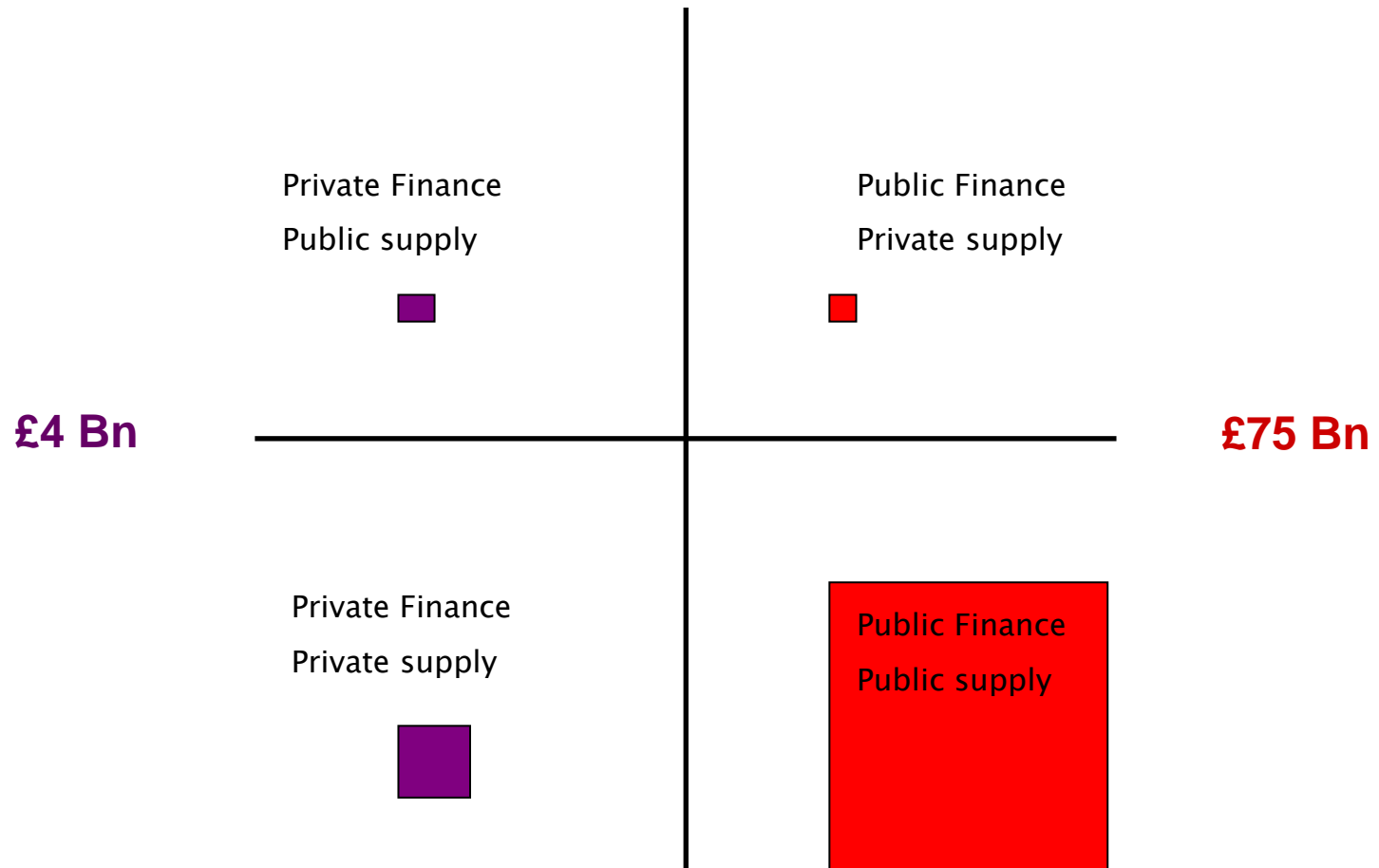
Central Middlesex Hospital Centre (ACAD)

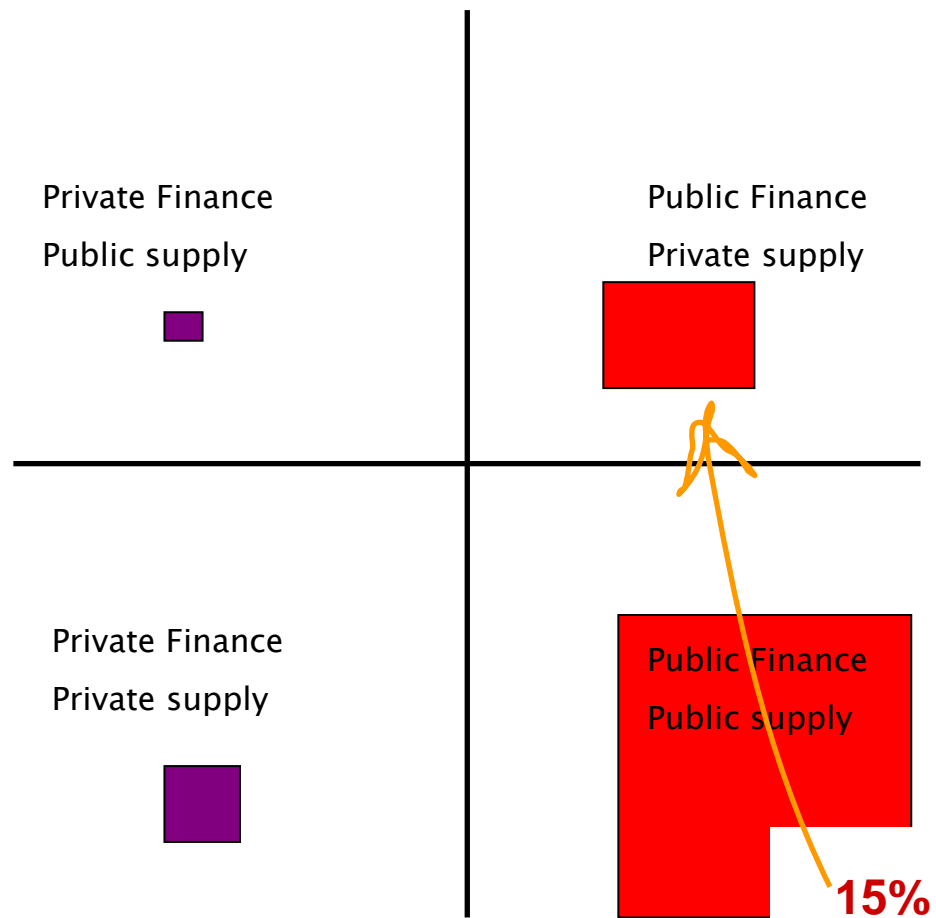


England 2003
 47 NHS Centres
 19 New Private
 Sector Centres









Example 1

1. OR International wins £100 million contract for 11,000 operations p.yr for 5yrs

Guaranteed price and volume
“Use or lose” deal

This company never yet treated pt in UK

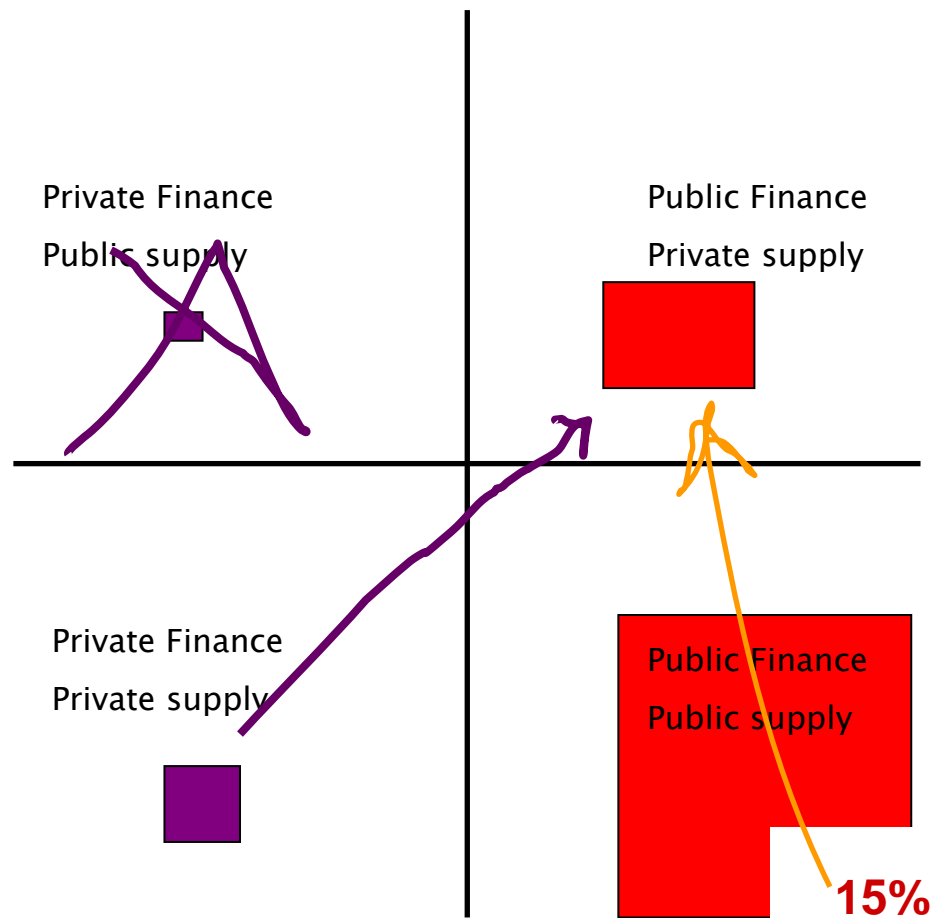
Example 2

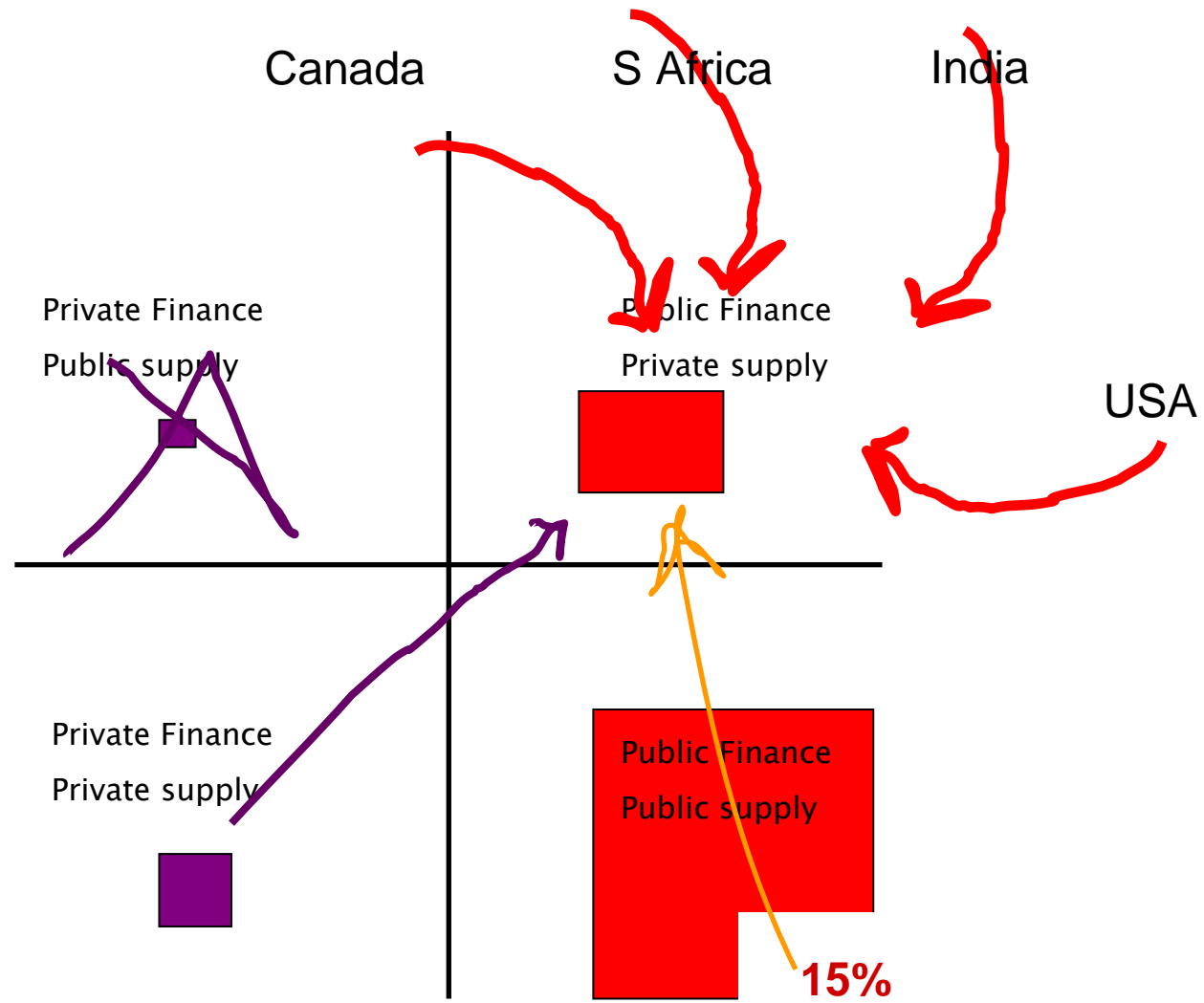
1. Alliance Medical wins contract for > 600,000 MRI scans over 5yrs

12 Mobile sets

50% of NHS price per scan

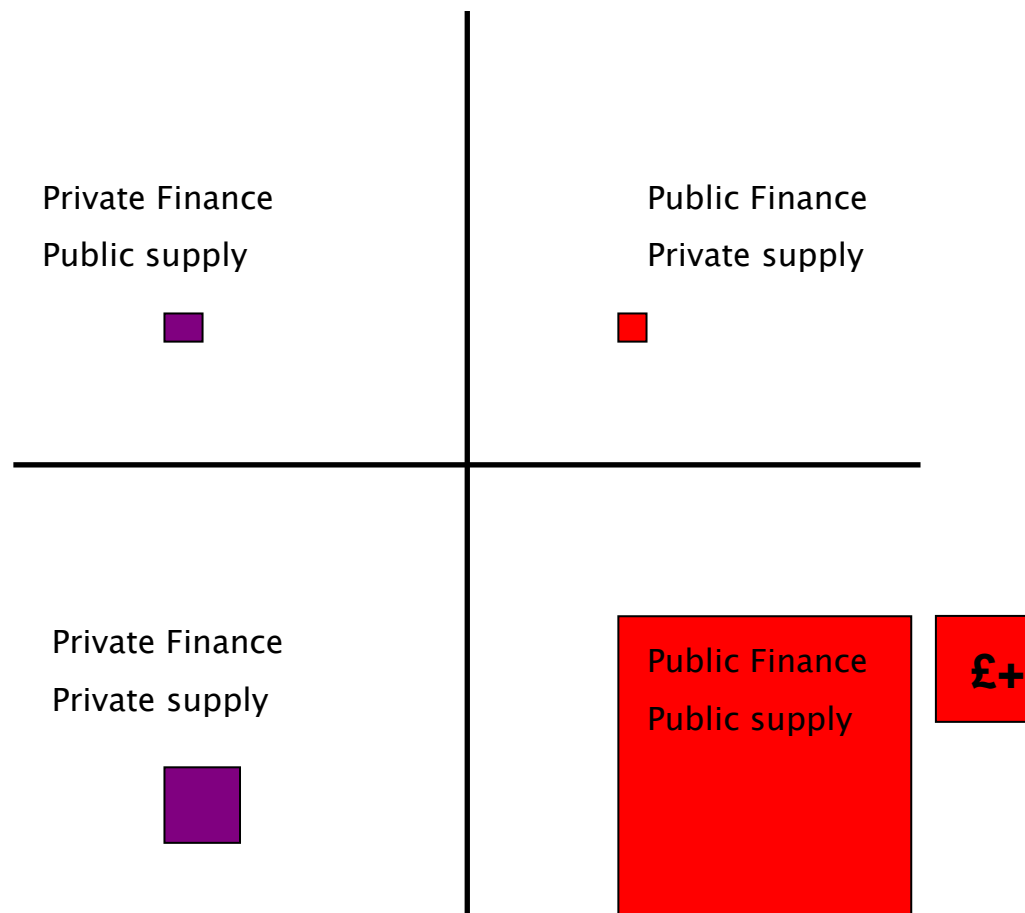
Increases volume by +15%





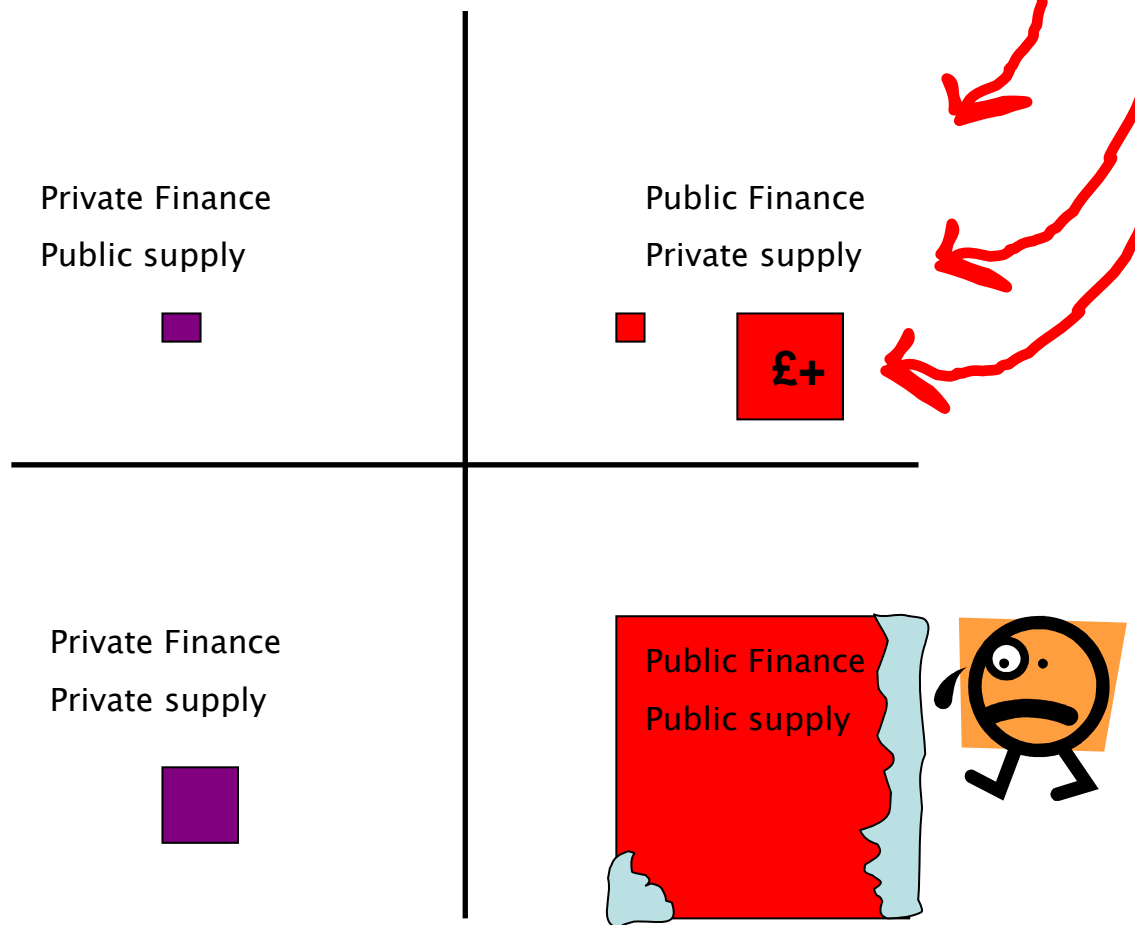
NHS has 900 Imaging Depts

Long waits, inefficient processes, insufficient capacity



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NHS England

1. \$150 Billions – 2007/8
2. Average revenue growth 7.6% (4yrs)

By 2008 the boundary between the NHS and the Private Sector providers will be changed dramatically to end the NHS monopoly of service

NHS becomes “Insurance Product?”

This pattern repeats in US and UK markets. Nearly all growth in surgery is in ambulatory care. Inpatient volumes static or declining.

Two thirds of surgery is ambulatory and increasing.

