



Healthcare NKEA

The Economic Transformation Programme (ETP) consists of 11 economic sectors + Greater Kuala Lumpur NKEAs



Greater KL / KV



Education



Business Services



Oil & Gas



Healthcare



Wholesale & Retail



Financial Services



Palm Oil



Electronics & Electrical



Agriculture



Tourism



Communication Contents & Infrastructure



The Healthcare sector has seen robust growth over the past decade and has one of the highest multipliers in the economy

8.8

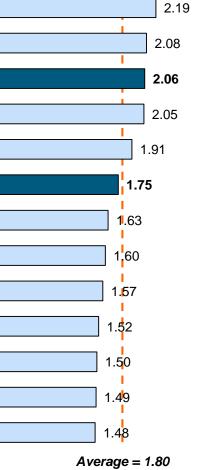
Historical growth rate, 2000-2009

| Health services and products | 8 |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------|
| Business services | 7.9 |
| Telecommunications | 7.8 |
| Financial services | 7.1 |
| Education | 6.8 |
| Tourism | 6.3 |
| Wholesale and retail Palm oil and related products Agriculture | 6.2 6.0 4.8 |
| Automotive and assembly | 4.5 |
| Real estate | 4.5 |
| Livestock and fisheries | 4.5 |
| Utilities | 4.3 |
| Transport and storage Metal products and equipment Construction Rubber and plastic products OGE and petroleum Forestry and related products Electrical and electronics | 3.6 3.4 1.9 1.5 1.4 0.1 |
| | |



Output multipliers of selected activities in Malaysia







2.34

Healthcare NKEA Entry Point Projects (EPPs) include products and services

Products

- Pharmaceuticals (EPP3)
- Medical Devices (EPP7-14)
- Hospitals (EPP4)
- Institutional Care Facilities (EPP16)
- Retirement Village (EPP17)



Services

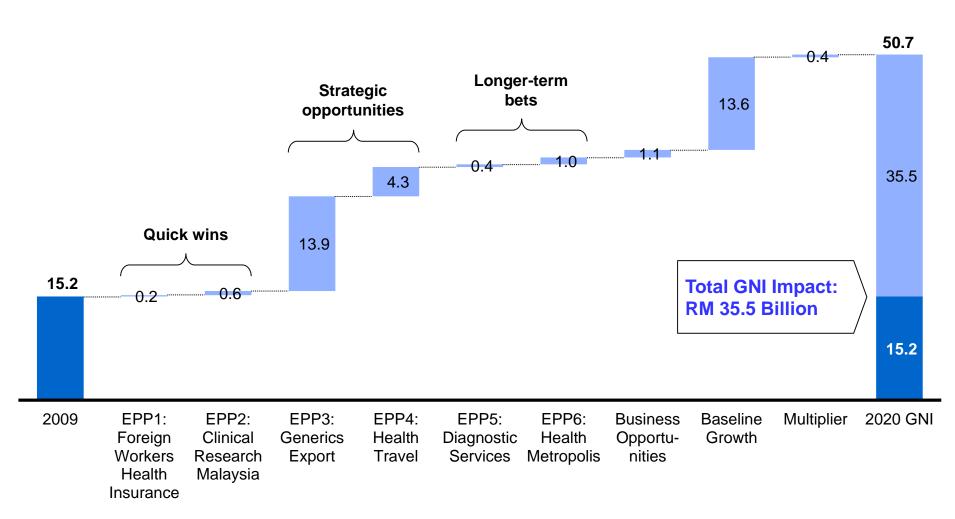
- Medical Insurance (EPP1)
- Clinical Research (EPP2)
- Healthcare Travel (EPP4)
- Teleradiology (EPP5)
- Research, teaching and services, UMHM (EPP6)
- Mobile Healthcare (EPP15)





Targets for Healthcare NKEA have been set at 2020

GNI contribution RM billion



Source: PEMANDU, Actual total GNI is 35.5 against 35.3 because of rounding up



5

The First EPP is a MOH led initiative, the rest by the private sector

EPP 1: Mandating Health Insurance for Foreign Workers



GNI by 2020: RM 171.3 mil



SKIM PERLINDUNGAN INSURANS KESIHATAN PEKERJA ASING (SPIKPA)

Mandating private health insurance for all foreign workers and improve workmen's compensation coverage.

In 2014, approximately 1.7 million foreign workers were insured under the Foreign Worker's Health Insurance Protection Scheme (SPIKPA), with the exception of domestic maids, and plantation workers, to reduce the strain on Malaysia's public healthcare system.



17 announced projects to-date under Healthcare NKEA, covering **14 EPPs**

EPP 2 Clinical Research Malaysia





Your Global Solutions in One Nation

Clinical Research Malaysia

GNI: RM578.4 mil Jobs: 1,000

EPP 3 M'sian Pharmaceuticals





Winthrop

Biopharmaceutical Manufacturing and Development Facility GNI: RM1.97 bil Jobs: 450

Hovid : Generic Pharmaceutical Drug Manufacturing

GNI: RM50 mil Jobs: 11

Greenfield Manufacturing Facility GNI: RM71 mil Jobs: 207

EPP 3 M'sian Pharmaceuticals (con't)





Metered Dose Inhaler Manufacturing GNI: RM26 mil Jobs: 53



Setting up of the first state of art vaccine formulation facility in Malaysia

GNI: RM115 mil **Jobs:** 105

Metered Dose Inhaler Manufacturing

GNI: RM42 mil **Jobs:** 102





Working to improve your health

Creating export platform for local private strategic pharmaceutical investment GNI: RM35 mil Jobs: 99 Metered Dose Inhaler Manufacturing

GNI: RM18.8 mil **Jobs:** 28

Local manufacturing of drugs for export market/ supply to public sector in Malaysia

GNI: RM39 mil Jobs: 7

Creation of an orphan drug manufacturing and export hub in Malaysia for Asia Pacific

GNI: RM48 mil Jobs: 34

BioCare Group Metered Dose Inhaler Manufacturing

GNI: RM47 mil **Jobs:** 125

EPP 4 Healthcare Travel







Amanjaya Specialist H'pital GNI: RM22.5 mil Jobs: 354



Sime Darby Medical Centre Ara Damansara (SDMC AD) GNI: RM107 mil Jobs: 785

Sime Darby Medical Centre Desa Park City (SDMC DPC) GNI: RM71 mil Jobs: 754

6 KPJ Hospitals (Klang, Sabah, Pahang, Pasir Gudang, Iskandar, Perlis)

GNI: RM268 mil Jobs: 3686

Diagnostic Services Nexus GNI: RM540 mil Jobs: 1,585

EPP 5 Diagnostic Services Nexus



EPP 6 Health Metropolis





UM Health Metropolis

GNI: RM986 mil **Jobs:** 10,400

9

EPP 7-14 Medical Devices EPPs



EPP 10: Create Malaysian Clinical Devices Champion



GNI: RM132 mil **Jobs:** 100

EPP 11: Medical Equipment Supply Chain Orchestration



GNI: RM191 mil Jobs: 2020

EPP 12: High value medical device manufacturing

TOSHIBA GNI: RM32.6 mil Jobs: 200

EPP 7: Upscale Medical Devices In-Vitro Diagnostic



GNI: RM31 mil Jobs: 60



GNI: RM6.8 mil Jobs: 38

EPP 8: Build Malaysian Showcase on Next Generation of SUD Products

GNI: RM51 mil **Jobs:** 145



GNI: RM7.4 mil Jobs: 146

EPP 9: Become the hub for high value medical device contact manufacturing



GNI: RM302 mil Jobs: 90

GNI: RM2.9 mil **Jobs:** 58

GNI: RM45 mil Jobs: 416

ABio Orthopaedics

GNI: RM161 mil **Jobs:** 1,102

EPP 7-14 Medical Devices EPPs (con't)



 EPP 13: Build Medical Hardware and Furniture Cluster



GNI: RM37 mil Jobs: 149

EPP 14: Renal Products



GNI: RM61 mil Jobs: 439



GNI: RM85 mil **Jobs:** 176



Senior Living EPPs



EPP 15: Mobile Healthcare Services



GNI: RM212 mil Jobs: 1,800

EPP 16: Institutional Aged Care



GNI: RM6.2 mil **Jobs:** 120

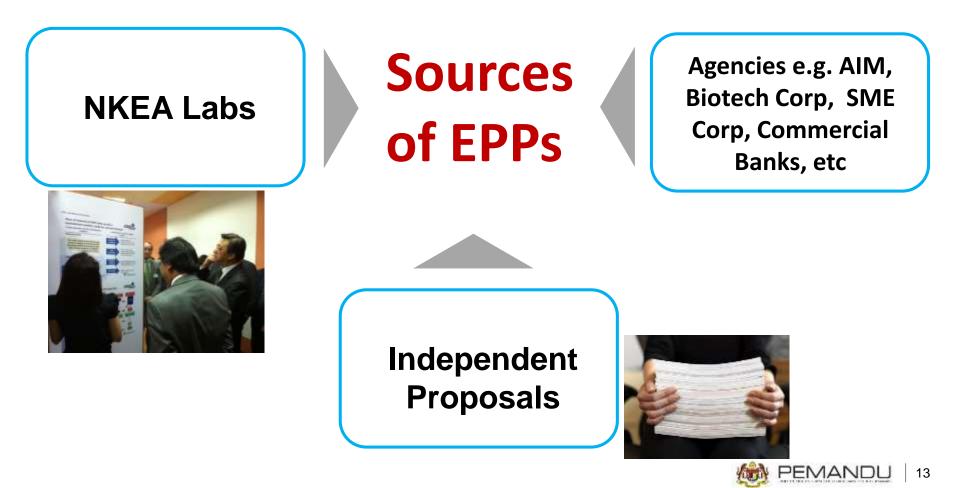
EPP 17: Retirement Villages



GNI: RM4.3 mil **Jobs:** 112

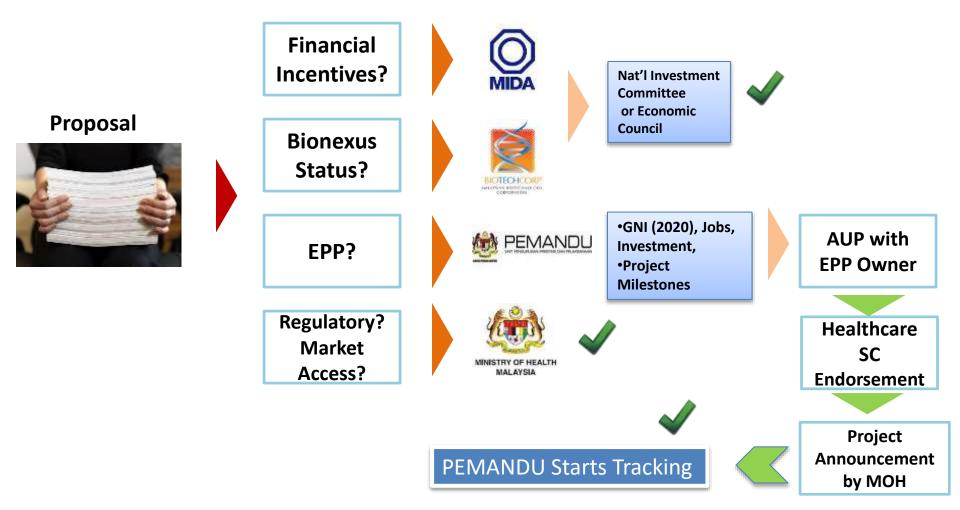


How can you participate in Healthcare NKEA?





Health Related EPPs - Proposals

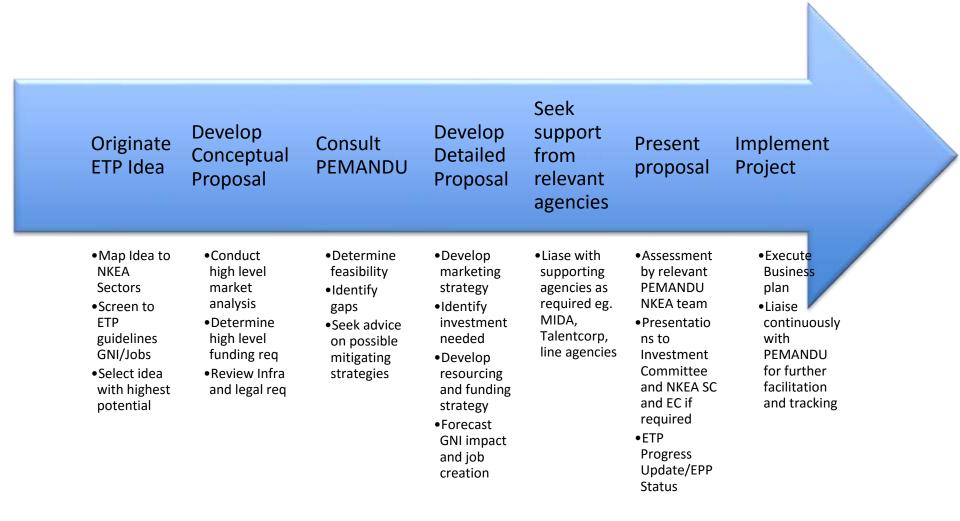




AUP Process: We validate your GNI, Investment and jobs numbers plus your business plans.

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7 Steps to ETP Success



When PEMANDU Starts Tracking

Implementation Plan and Project Milestones

Periodic Reports

Validation

- Forward implementation plans and significant miles stones to PEMANDU.
- Submit the following to PEMANDU on a monthly basis:
 - Progress of project against original plan
 - Actual investment to date
 - Actual jobs to date
 - Actual GNI (employee compensation after first hire/revenue after operational)

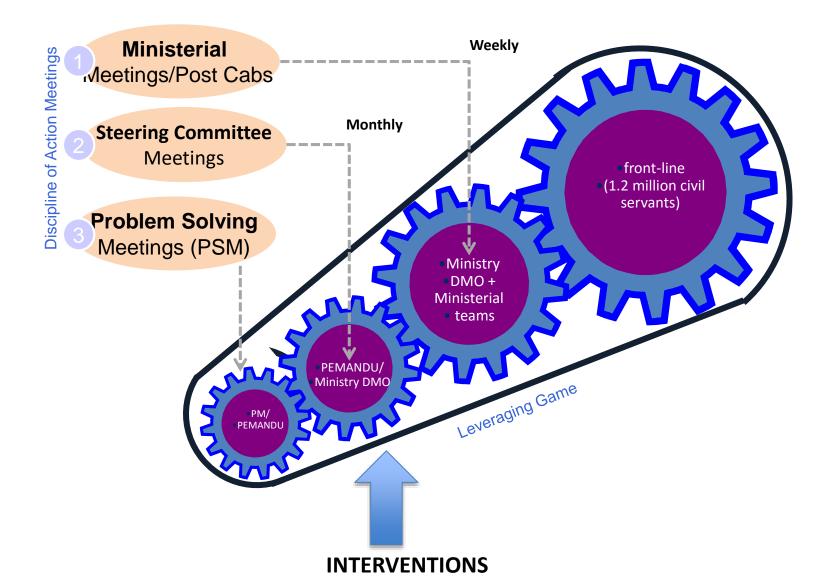
- Possible 'Audit' by independent auditors on annual basis to validate:
 - Assumptions/basis for GNI/Investment/Jobs (one time only)
 - Progress of project against original plan
 - GNI/Investment/Jobs results

We track all NKEA on weekly basis [Discipline of action]

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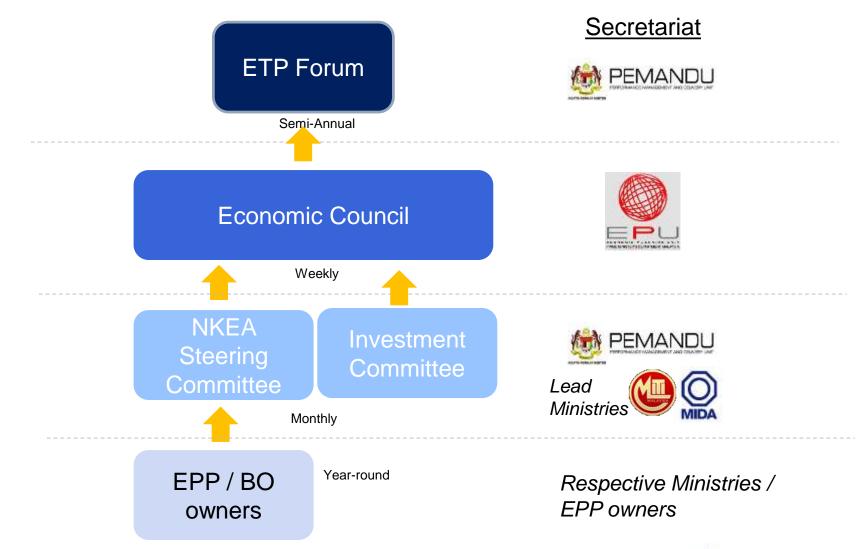
Implementation

Leverage + Discipline of Action





ETP Governance Structure to ensure delivery





PEMANDU's Role in ETP

Conduit between private Sector & Gov. 🗸

- 1
- Open doors to Other Depts./ Regulators
- 2
- Access to Top Decision Makers via NKEA SC, PSM and Other Forums
- Facilitation financing from both public & private sources
 - Facilitate market access and Off-take Agreement
- 5

Initiate Dialogue/Cooperation between both public and private sectors

Inter-NKEA Cooperation

Mandated by PM to drive Transformation Programmes





Cuts across all sectors and jurisdictions

Programme Manage

Track progress weekly



Facilitate smooth & Faster Execution

Business Matching



Publicity





3

NKEA Progress Updates

Press Releases/Public Forums

Thank You



ETP Homepage: http://etp.pemandu.gov.my/

Facebook: https://www.facebook.com/etpmalaysia

Twitter: @etp_roadmap

To become a part of the ETP: http://etp.pemandu.gov.my/getting_started.aspx