Imagine innovative thinking. We do.
Advancing healthcare
In this moment in the history of our country, while we are grappling with the building of a healthcare system that enables access to quality healthcare for all, the Hospital Association of South Africa is committed to collaboration with all other stakeholders to build lasting, tangible solutions to this challenge.

We are therefore committed to engagement and collaboration with legislators, regulators, and other stakeholders in forums where we can contribute our experience, and our research-based and evidence-led insights. The Hospital Association of South Africa recognises its responsibilities as a key component of the healthcare system, and we are eager to make our contributions towards a brighter tomorrow. In recognising this, we recognise too our responsibility to contribute to our national development and growth imperatives and to always act according to our agreed values.

We invite you to read the following pages to better understand who we are, what we stand for, and how we contribute to our country’s health. We look forward to engaging with you and all others who are working collaboratively towards a healthier and more secure future.

“...the Hospital Association of South Africa is committed to collaboration with all other stakeholders...”

Dr. Biren Valodia
Chairman of the Board, Chair of the Operations Committee: Chief Marketing Officer for Mediclinic Southern Africa

In fulfilling our purpose, HASA is:

- Positively engaging with all healthcare stakeholders to collaboratively build solutions to the challenges facing healthcare in South Africa
- Contributing resources, insights, knowledge and experience to enable access to quality healthcare for all South Africans
- Serving the interests of patients by promoting transparency, quality care, and patient safety
- Helping to build a strong South African healthcare system through cooperative, collaborative, visionary, evidence-based partnerships
The Hospital Association of South Africa carries out its mandate under the leadership of an exceptionally qualified and knowledgeable Board of Directors that is drawn from the ranks of the most senior executives of our member groups. Aggregated, the Board has critical skills in medicine, hospital management, finance, economics, marketing, and the law. A number of Board members have experience working in, and with, the public sector. The Board complements its own abilities and knowledge through contracting on a project basis with external experts who are each best-in-class at what they do.

We are committed to sharing this pool of research, experience, and insight with all stakeholders who are seized with the need to meet the national objective of a continually improving healthcare system that benefits all South Africans. Our members are similarly committed to making our resources available in ways that benefit consumers directly – through utilising spare capacity, undertaking pro bono procedures to shorten waiting lists, and investing in leadership capacity building and research, for instance.

We are gratified to note that there is an increasing willingness among various stakeholders to similarly share their resources. In short, at HASA we look to the future optimistically, with a view that together, we can meet the healthcare system’s imperative of delivering access to quality healthcare for all.

“Our members are committed to making our resources available in ways that benefit consumers...”

Dr. Dumisani Bomela
Chief Executive Officer and Chairman of the Board Stakeholder Engagement Sub-Committee, not aligned to any member group

Our agreed values are to:

1. Act with integrity and dignity towards patients and stakeholders
2. Be caring in our approach
3. Engage with various parties for the greater good of healthcare
4. Act responsibly at all times
Imagine collaboration. We do.
Advancing healthcare
Our members comprise three securities exchange-listed hospital groups – Life Healthcare, Mediclinic, and Netcare – and the National Hospital Network, a voluntary association of privately owned medical facilities.

<table>
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<tr>
<th>OUR MEMBERS</th>
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<tr>
<td>Our members comprise three securities exchange-listed hospital groups – Life Healthcare, Mediclinic, and Netcare – and the National Hospital Network, a voluntary association of privately owned medical facilities. Aggregated, our members offer a range of services including acute and primary healthcare services such as renal centres, mental health support, and rehabilitation centres.</td>
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<td><strong>Life Healthcare</strong></td>
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<td>Life Healthcare offers specialist, focused, multi-disciplinary hospital and related healthcare services at 64 medical facilities in seven provinces. The group offers intensive care units and high-care facilities, dedicated cardiac units, dedicated acute rehabilitation units, mental healthcare units, and dedicated renal dialysis units with 304 renal stations. The Group also provides advanced oncology radiotherapy technology in three provinces, and business services including employee wellness and occupational health, as well as contracted healthcare management services to government facilities. Life Healthcare operates in Poland, the United Kingdom, and parts of Western Europe.</td>
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<td><strong>Mediclinic</strong></td>
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<td>The Mediclinic Group manages approximately 20% of the Southern African private hospital sector and holds a 29.9% interest in Spire Healthcare plc, a private hospital group in the United Kingdom. It comprises Mediclinic Southern Africa (including Namibia) with 51 full-service hospitals and 4 day clinics; Mediclinic Middle East, which operates through 7 hospitals and 22 clinics with more than 900 hospital beds; and Hirslanden, which operates 18 hospitals and 4 clinics in Switzerland. Mediclinic focuses on providing acute care, specialist-orientated, multi-disciplinary hospital and related services.</td>
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<td><strong>National Hospital Network</strong></td>
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<td>The National Hospital Network (NHNI), founded in 1996, brings together independently owned private hospitals in South Africa under one umbrella, with a view to gaining service and operational synergies from the resulting intra-hospital relationships. The Network boasts 214 institutions made up of 61 hospitals, 55 day clinics, 34 psychiatric facilities, 18 ophthalmology facilities, 44 sub-acute facilities and 2 rehabilitation facilities in Johannesburg, Pretoria, Durban, Bloemfontein, Cape Town, and Port Elizabeth.</td>
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<td><strong>Netcare</strong></td>
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<tr>
<td>Netcare operates the largest private hospital, primary healthcare, emergency medical services and renal care network in South Africa, as well as the largest private hospital network in the United Kingdom. Netcare operates through 58 hospitals, including four public private partnership (PPP) facilities, while National Renal Care (NRC) operates 843 renal dialysis stations. The Group offers national emergency medical services through Netcare 911, and operates 90 primary healthcare centres and travel clinics, 15 day clinics, three sub-acute facilities as well as occupational health and employee wellness services through Medicross. Mental health support and facilities are provided throughout the Akeso Group.</td>
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<th><strong>OUR MEMBERS</strong></th>
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<tr>
<td><strong>INDEPENDENT ASSOCIATE MEMBERS</strong></td>
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<tr>
<td>A number of independent hospitals and hospital groups from around the country enjoy associate membership status with HASA. These include general and specialist facilities, including psychiatric clinics.</td>
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The database of private healthcare sector facilities constructed is likely an underestimation of the total market, but is the most up-to-date analysis available, according to a study conducted in 2017 by Econex for the Hospital Association of South Africa (Private Hospitals Contribution to the South African Economy, 2017, Econex). Together, private sector hospitals provide critical services and world-class facilities to visitors and South Africans and play a crucial ambassadorial role overseas for the country.

<table>
<thead>
<tr>
<th>Facilities</th>
<th>Licensed Beds</th>
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<tr>
<td>524</td>
<td>40,514</td>
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<tr>
<th>JSE-listed HASA Members</th>
<th>HASA Members</th>
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<tr>
<td>26,731</td>
<td>30,549</td>
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</table>

The database of the private healthcare sector facilities constructed is likely an underestimation of the market, but is the most up-to-date estimate available (Econex).
Hospital Association of South Africa members, aggregated, offer services and facilities throughout the country and in all major metropolitan centres. Where member facilities are established, a range of services is available to consumers, including acute care facilities such as intensive care units, emergency services, renal care stations, cardiac care, and operating theatres on the one hand, and on the other, primary care facilities such as ophthalmology, mental care support, rehabilitation centres, and in some cases, pharmacies. Most member facilities are situated in areas of demand by medical scheme members.

The figures reflected on this page refer to Life Hospital, Mediclinic and Netcare, and are therefore an underestimation of the total number of institutions and beds provided by private hospitals around the country.
The HASA Board and office-bearers are nominated and elected annually from among member groups. The Board members serve voluntarily. The executive is represented on the Board by the Chief Executive Officer who is not aligned with any of the member groups. The Board oversees specific committees, namely the Communications and Advocacy Committee, the Stakeholder Relations Committee, the Research Committee, the Clinical Quality Committee, the Operations Committee and the Legal and Compliance Committee. The Board’s wide range of skills encompass the fields of medicine, finance, economics, marketing, law, hospital management, administration, and strategy.

**OUR LEADERSHIP**

Dr Biren Valodia  
Chairman of the Board and Chief Marketing Officer for Mediclinic Southern Africa

Matthew Prior  
Deputy Chairman and Funder Relations and Health Policy Executive at Life Healthcare

Tienie Van Den Berg  
Treasurer and retired hospital manager at Zuid-Afrikaans Hospital

Dr Dumisani Bomela  
Chief Executive Officer; not aligned to any member group

Melanie Da Costa  
Director of Strategy and Health Policy at Netcare

Lynelle Bagwande  
Company Secretary and General Counsel at Netcare

Amil Devchand  
Deputy Chief Executive Officer at Lenmed

Clara Findlay  
Chief Legal Officer at Mediclinic Southern Africa

Dr Paul Soko  
Executive Head of Clinical Services and Quality at Life Healthcare

Otto Wypkema  
Managing Director of Arwyp Medical Centre and Chairman of the National Hospital Network

Neil Nair  
Chief Executive Officer, National Hospital Network

Mark Peach  
Executive Head of Public Affairs
Imagine dialogue. We do.
Advancing healthcare
Together, aside from providing world-class care to consumers, HASA members make a significant contribution to the development and economic health of South Africa through job creation, skills development, taxes, procurement and social investments.

Private hospitals play a particularly important role in offering quality care, and so contribute to inward investment by making South Africa an attractive investment destination. In addition, member groups act as brand ambassadors for South Africa.

**ECONOMIC IMPACT**

The figures above are aggregated numbers from Netcare, Mediclinic, and Life Healthcare’s South African operations. They are therefore an underestimate of the total impact of all private hospitals.

- Capital stock to the value of **R144.1 billion**, equivalent to 1.8% of all capital stock in South Africa.
- **R16.4 billion** Government tax revenue of throughout the economy.
- **248 504 jobs** Private hospital groups supported jobs throughout the economy, equivalent to 1.57% of national employment.
- **53 500** Private hospital groups’ activities stimulated production of intermediate goods and services worth R130.9 billion throughout the economy.
- **5** For every person directly employed by the private hospital groups, almost 5 additional formal and informal jobs were supported in the South African economy.
- **R118 million** For every R100 of private hospital services delivered by private hospital groups, South Africa’s GDP grew by R1.3.
- **R10 million** For every R10 million worth of capital investment, private hospital groups created 20 jobs.
- **R118 million** In 2016/17, the groups spent over R118 million on CSI initiatives.

Private hospital groups contributed **R53.3 billion** to the national economy, equivalent to 1.3% of GDP. R26.4 billion in salaries to households and R29.1 billion in profits for local companies.
The private hospital sector has for many years been actively involved in supporting various health initiatives. Over the last few years our members have contributed significantly to community health, building capacity through bursaries, funding doctoral research in the medical sciences, providing critical care support, reducing treatment backlogs, funding healthcare procedures and helping non-governmental organisations.

**CORPORATE SOCIAL INVESTMENT**

> R632 million over the last 5 years

**Bursaries & Skills Development**
- including bursaries, employee support, leadership development, and healthcare skills training in various areas of delivery.

**Enhancing Public Health**
- through the Public Health Enhancement Fund to train more doctors, strengthen health management and fund local research.

**Community Health**
- including cataract removals, equipment donations, diabetic outreach, cleft lip and palate treatment, sexual assault centres and blanket drives.

**Support for NGOs**
- Breastmilk Reserve and various donations to institutions working for a healthier South Africa throughout the country, specifically in rural areas.
Over the last decade, we have built up a database of crucial research that has informed our position on the healthcare debate in the country. All research is freely available from the corporate website www.hasa.co.za and includes subjects such as:

**General Topics:**
- Quality Measurement and Reporting in the South African Hospital Industry (Insight Actuaries and Consultants)
- International Benchmarking of Hospital Utilisation: How Does the South African Private Sector Compare? (Insight Actuaries and Consultants)
- South Africa’s Burden of Disease (Econex)
- The Contribution of HASA Member Hospitals to the South African Economy (Econex)
- Rising Prices in the Healthcare Sector: Unpacking Health Inflation (Econex)
- Supply-Induced Demand in the Private Healthcare Sector: Theoretical Considerations (Econex)
- Identifying the Determinants of and Solutions to the Shortage of Doctors in South Africa: Is There a Role for the Private Sector? (Econex)
- Comparing the Cost of Delivering Hospital Services Across the Public and Private Sectors in South Africa (Shivani Ranchod)

**National Health Insurance Topics:**
- Estimating the Financial Cost of the NHI Plan
- Cancer and the NHI: Cost Constraints and Opportunities
- What Does the Demand for Healthcare Look Like in South Africa?
- Funding the NHI – Earmarked Tax
- Private Voluntary Health Insurance Under the NHI
- The Human Resource Supply Constraint: The Case of Nurses
- National Health Systems: Public Service versus Insurance-Based Models
- Integration of the Public and Private Sectors Under a National Health Insurance System in South Africa

**Three videos are also available in the Understanding Healthcare Series**
1. Mariné Erasmus on Health System Resources
2. Helen Kean on Supplier-Induced Demand
3. Helenya Fourie on the Consumer Price Index vs Healthcare Inflation
Every year, we host a world-class conference featuring global and local experts who are invited to contribute their expert knowledge to delegates that are drawn from the ranks of legislators, regulators, hospital group executives, hospital managers, consultants, civil society, suppliers to hospitals and the general healthcare sector, and the media.
Imagine optimism. We do. Advancing healthcare
Imagine practical, provable solutions. We do. Advancing healthcare