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UK Medico-Legal and Insurance Market 2017

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Rehabilitation and allied medical services (RAMS)
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MARKET STRUCTURE

A market in three layers

MARKET DEVELOPMENTS AND DRIVERS

Rehabilitation boosts the bottom line
While medical expertise assists in assessing the validity of claims and expediting legal cases
But pre-med offers persist
Growing focus on rehabilitation and psychological rehab
Increased NHS Recovery cost charges
Labour market changes do not help the MILS providers
But problems in the NHS could boost demand
Medco and the Claims Portal
Reform of the personal injury market
Insurers press for curbs to Noise-induced hearing loss (NIHL)
Expert opinion gets harder to give

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THE KEY PLAYERS

Bodycare Clinics Ltd/ Doctors Chambers (UK) Ltd
Broadspire Rehabilitation
Bush & Company Rehabilitation
Exam Works/Premex
FL360 companies (Corpore-TTN, Speed Medical Examination Services)
Health & Case Management Ltd (HCML)
IPRS Group
The Integrated Care Clinics Ltd (TICCS)
Injury-QED Ltd (I-QED)
On Medical Ltd
Premier Medical (formally Capita Medical Ltd)
RehabWorks Ltd
Slater & Gordon Solutions
Other providers

MARKET SIZE AND TRENDS

A £650 million market
The addressable market for MLIS declines
Medco report generate £100 million in revenue
Employers liability and motor, the areas where most money is paid out
Demand for expert witnesses grows over 2015/16
Number of personal injury claims heard in court declines
Almost eight-in-ten insurers funding rehab
Proactive rehabilitation grows in importance
Leading to a greater focus on low value claims

THE FUTURE

Less personal injury work
The ME sector could lose £37 million or could gain £11 million
Rehab will also be hit
Future Market Size depends on the MoJ Options
A reduction in the number of personal injury lawyers
And Brexit adds to the uncertainty
But could making the Rehab Code compulsory save the day?

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And could rehabilitation replace financial payouts by insurers?
The introduction of fixed fees, a threat to expert witnesses and rehabilitation
Expert witnesses will need to become more IT savvy
New opportunities in the occupational health sector

ASSOCIATIONS

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