



**ABHI**

HealthTech for Life

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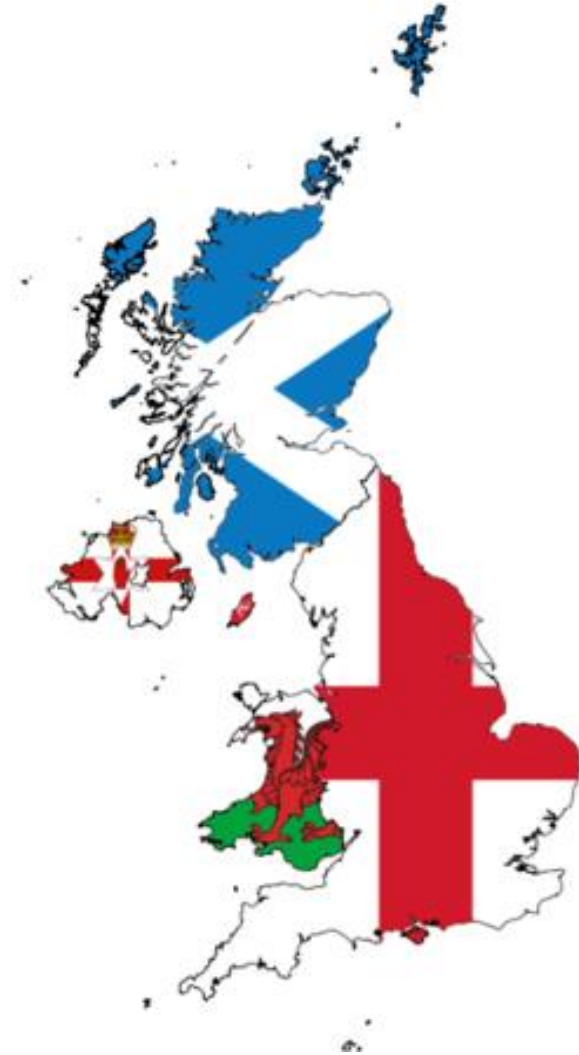
# **UK NHS MARKET ACCESS**

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**Luella Trickett**

**Executive Director, Medical Devices, Value & Access**

# UK NHS



Healthcare is devolved to the four nations



69.3 million



5.5 million



3.2 million



1.9 million

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# NHS LANDSCAPE IN ENGLAND

- › Department of Health & Social Care / NHS England merger
- › 7 Regions
- › ICB mergers from 42 to 26
- › These changes began last year and are expected to be concluded by April 2027
- › Neighbourhood Health
  - › Developing plans for implementation in 2027

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# ICBs

## Purpose and Role of ICBs

- › Become strategic commissioners, focusing on population health, reducing inequalities, setting long-term strategy and ensuring value from NHS spend
- › Act as “healthcare payers” – ensuring that resource allocation, contracts, incentives support outcomes and efficiency rather than simply volume or tradition

## Some functions stay core:

- › strategic planning, population health management, understanding local health needs, commissioning, oversight of quality, governance etc
- › Other functions may be transferred to regional teams or to providers (e.g. certain digital leadership, sustainability, workforce development, estates strategy, medicines optimisation) where better-delivered outside ICBs

# THE PROCUREMENT LANDSCAPE

- > NATIONAL PROCUREMENT SCOTLAND
- > PROCUREMENT AND LOGISTICS SERVICE NORTHERN IRELAND
- > PROCUREMENT SERVICES WALES



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# NHS ENGLAND

NHS England Central Commercial Function/DHSC Commercial & Growth Directorate

NHS Supply Chain

HealthTrust Europe  
Shared Business Services

Integrated Care Systems Procurement Collaboratives

Trust Collaboratives e.g. Shelford Group

Local Trust Procurement



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# BECOMING A SUPPLIER TO THE NHS

- › NHS Supply Chain has [extensive information](#) for suppliers
- › Public Procurement – Procurement Act 2023
- › NHS tends to use Frameworks as primary procurement vehicle
  - › Under the Procurement Act 2023 these can be as long as 8 years
- › Economic and Financial Standing Assessment
  - › Use of Credit Assessment Agencies
  - › Companies House reporting

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# NICE

- › HealthTech Programme Manual
  - › Life cycle approach
    - › Early Use
    - › Routine Use
    - › Existing Use Guidance (formerly named Late Stage Assessments)
- › Technology Appraisals
  - › Methods and Process has HealthTech specific elements
  - › Route for National HealthTech Access Programme (NHAP)
- › Interventional Procedure Guidance
  - › Statutory safety and efficacy assessment for novel procedures

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# NICE

- › National HealthTech Access Programme (NHAP)
  - › Capsule Sponge
  - › AI for detection of breast & prostate cancer
    - › AI to improve detection of endometrial cancer in women with unexplained vaginal bleeding
    - › AI-to help analyse chest X-rays for suspected lung cancer in primary care referrals
      - › 3-5 more.....
- › Existing Use Guidance
  - › Intraocular lenses
  - › Surgical mesh for hernia
  - › Endoscopic submucosal dissection knives
  - › Digital hearing aids

# DHSC MEDTECH STRATEGY



## Implementation

21 Key Initiatives

21 key initiatives across the four priorities to help deliver the vision of Right Product, Right Place, Right Price for Medtech.

DHSC Led	<span style="display:inline-block; width:10px; height:10px; background-color:teal;"></span>
NHSE Led	<span style="display:inline-block; width:10px; height:10px; background-color:lightblue;"></span>
NHSSC Led	<span style="display:inline-block; width:10px; height:10px; background-color:purple;"></span>
MHRA Led	<span style="display:inline-block; width:10px; height:10px; background-color:red;"></span>
NICE Host	<span style="display:inline-block; width:10px; height:10px; background-color:orange;"></span>
Paused	<span style="display:inline-block; width:10px; height:10px; background-color:lightgrey;"></span>
New initiatives	<span style="display:inline-block; width:10px; height:10px; background-color:yellow;"></span>

	<b>Dynamic Purchasing System (NHSE)</b>		
	<b>HealthTech Accelerator Fund</b>	<b>Category Strategy (DHSC)</b>	
	<b>Innovative Device Access Pathway</b>	<b>MedTech Compass (DHSC)</b>	
<b>Design for Life</b>	<b>Multi-tech Evaluations</b>	<b>National Product Information Management (PIM) Database</b>	<b>MedTech Green Book (NHSE)</b>
<b>Supply Resilience Plans</b>	<b>Innovation &amp; Value Classifications</b>	<b>National Equipment &amp; Inventory Tracking System</b>	<b>Medical Devices Regulations Amendment Programme (MHRA)</b>
<b>UK MedTech Capability and Capacity</b>	<b>Demand Signaling</b>	<b>MedTech Data Room</b>	<b>Part IX Tariff Consultation</b>
<b>Category Strategies &amp; Contracts</b>	<b>Medtech Funding Mandate (NHSE)</b>	<b>National Outcome Registries</b>	<b>National Diagnostics Programme</b>



## Priority One

Resilience and Continuity of Supply



## Priority Two

Innovative and Dynamic Markets



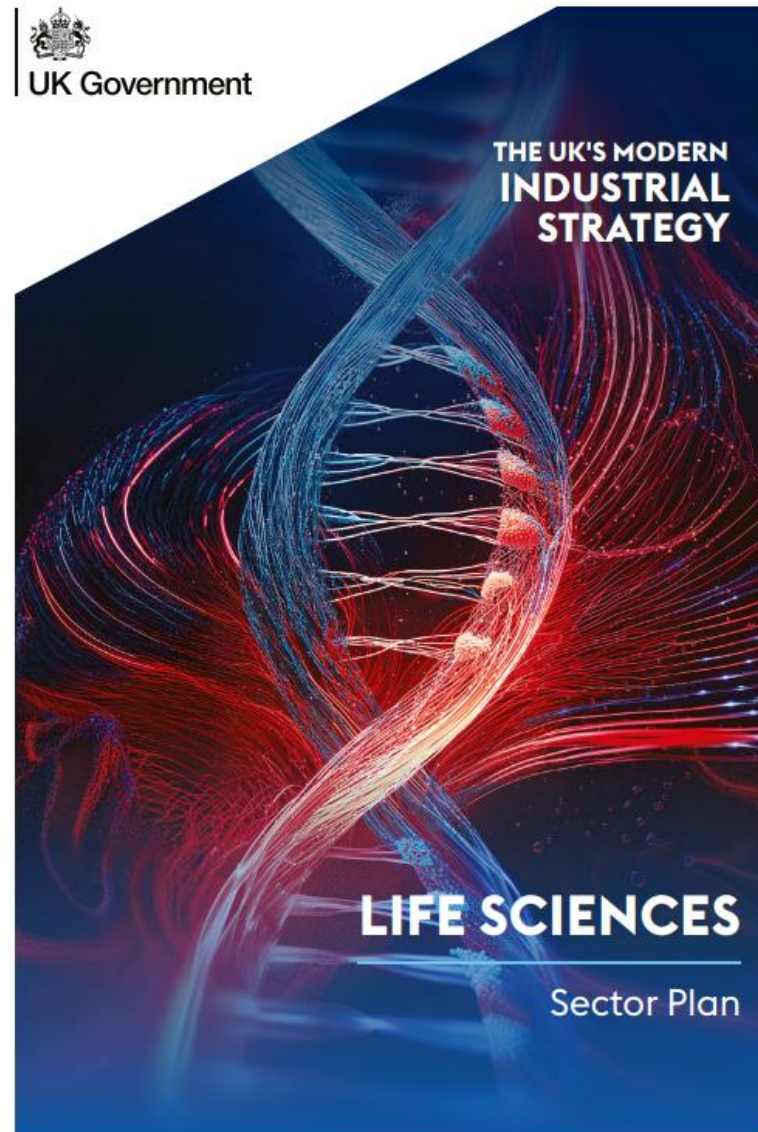
## Priority Three

Enabling Infrastructure



## Priority Four

Specific Market Focusses



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# THREE SHIFTS

- › Move care out of hospital to community
- › Move from an analogue to a digital service
- › Move from treatment to prevention

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# CORE ELEMENTS

- › Significant focus on the role of digital, data, AI etc
- › Healthtech is part of the solution
- › Streamline procurement – unwarranted variation, value and growth
- › NICE has a prominent role
  - › Roll out surgical robots in line with NICE Early Value Assessment Guidance
  - › Expand NICE’s remit for HealthTech & recommend removal of outdated technologies
  - › Dental focus on check up frequency
  - › Look at teledermatology
  - › Healthstore for Apps approved by NICE
  - › Virtual wards and medically approved wearables
  - › Rules Based Pathway **now named National HealthTech Access Programme**
  - › Single National Formulary
  - › Aligning pathways – closer working with MHRA

# MEDTECH COMMERCIAL STRATEGY

## Commercial Opportunity

### The Challenge

The **fragmented** operating environment leads to **duplication** of buying, causing internal (NHS) **inefficiencies** and missed value opportunities, **increased cost** to serve for suppliers and **lost innovation** opportunity for all.

### The Opportunity

Developing a conscious **overarching Medtech Commercial Strategy** for the circa £13bn of spend a year with detailed **sub-category plans** (medical consumables; implants; equipment; pathology and MedTech digital) to bring additional commercial **cohesion** to the operating environment.

## Commercial Strategy Development: Key Outputs

01

### Overarching Commercial Strategy

*Analyses MedTech commercial challenges and opportunities prioritising high-impact interventions, that drive value, savings, innovation, growth and better outcomes.*



02

### Sub-Category Plans

*For material areas of spend, market and industry landscape, spend analysis, routes to market, gaps and/or inefficiencies, future recommendations and interventions.*



03

### Implementation Plan

*A phased plan that details steps, RACI, governance and risks, mitigations, needed to mobilise the strategy and frameworks.*



# CONTEXT

## Current MedTech Initiatives

	Primary Care	Secondary Care				
Sub -category	Medical Consumables	Medical Consumables	Implants and Devices	Equipment	Pathology	MedTech Digital
Spend (£bn / year)	£1.5bn <sup>2</sup>	£1.9bn*	£2.4bn*	£4.1bn*	£2bn*	£1bn†
National Initiatives / programmes (DHSC / NHS E)	National HealthTech Access Pathway (NHAP)					
	National Product Information Management System					
	MedTech Compass Product Comparison & Innovation Passporting System					
	Medical Device Regulations					
	Design for Life Programme – Circular Economy					
	Intellectual Property Guidance					
	Sustainability and Evergreen					
	Value Based Procurement Standard Guidance					
	Home Delivery					
	NHS Supply Chain initiatives / programmes	Part IX Drug Tariff Reform		Loan Sets	NETIS	Pathology Guidance
Inventory System Programme					Robotics	
National (NHSSC) Category Strategies					AVT	

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# IMPLEMENTING INNOVATION

- › Health Technology Appraisals
  - › National Institute for Health & care Excellence (NICE).
  - › Health Technology Wales (HTW).
  - › Scottish Health Technologies Group (SHTG).

# IMPLEMENTING INNOVATION

[MedTech Support Tool.](#)  
[Innovation Service.](#)

## Organisations involved in the Service

The **AHSN** Network



**NICE** National Institute for Health and Care Excellence

**NIHR** National Institute for Health Research



**NHS**  
Supply Chain



[→ Find out more about the organisations behind the Service](#)

## About the NHS Innovation Service

The NHS is a large and complex system, and introducing new products and technologies can be challenging. Innovators must demonstrate the value of their product and navigate complex regulatory and procurement processes. For the NHS, finding new innovations that meet its needs can be equally difficult.

The NHS Innovation Service is a free, online platform created to solve both problems. To help the NHS find the best new innovations and provide innovators with the resources, tools and support they need to increase the chances of getting their product or idea adopted by the NHS.

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# IMPLEMENTING INNOVATION

## > HEALTH INNOVATION NETWORKS (HINs)

- > 15 organisations that act as a network
- > Bring together industry , academia & NHS
- > Act as local support – free and paid for services
- > Undertake initial needs assessments for technologies submitted to the Innovation Service

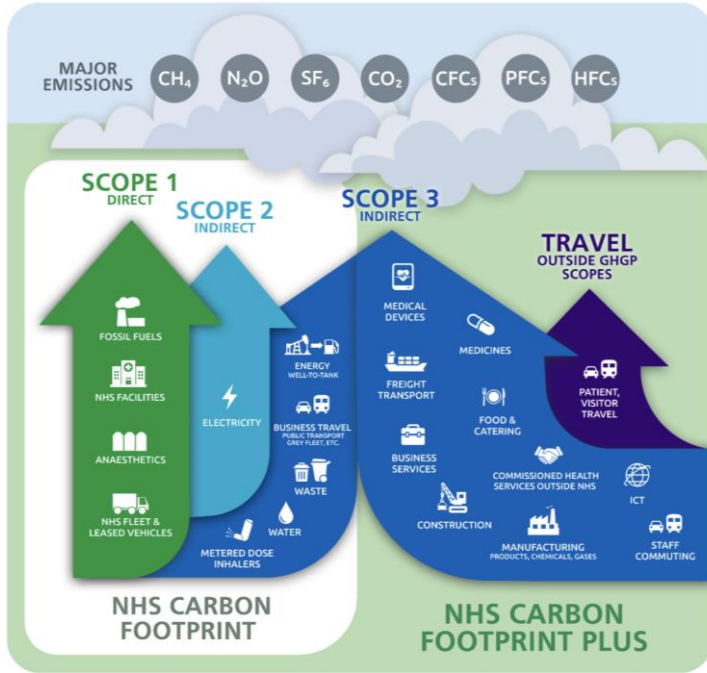
# DELIVERING A 'NET ZERO' NHS

- ›Published in October 2020.
- ›Evidence-based document outlining where improvements need to be made.
- ›First National Health Service to commit to net zero.
- ›Net zero by 2040 for emissions NHS controls directly.
- ›Net zero by 2045 for emissions NHS has ability to influence.
- ›NHS Net Zero Supplier Roadmap published in 2021

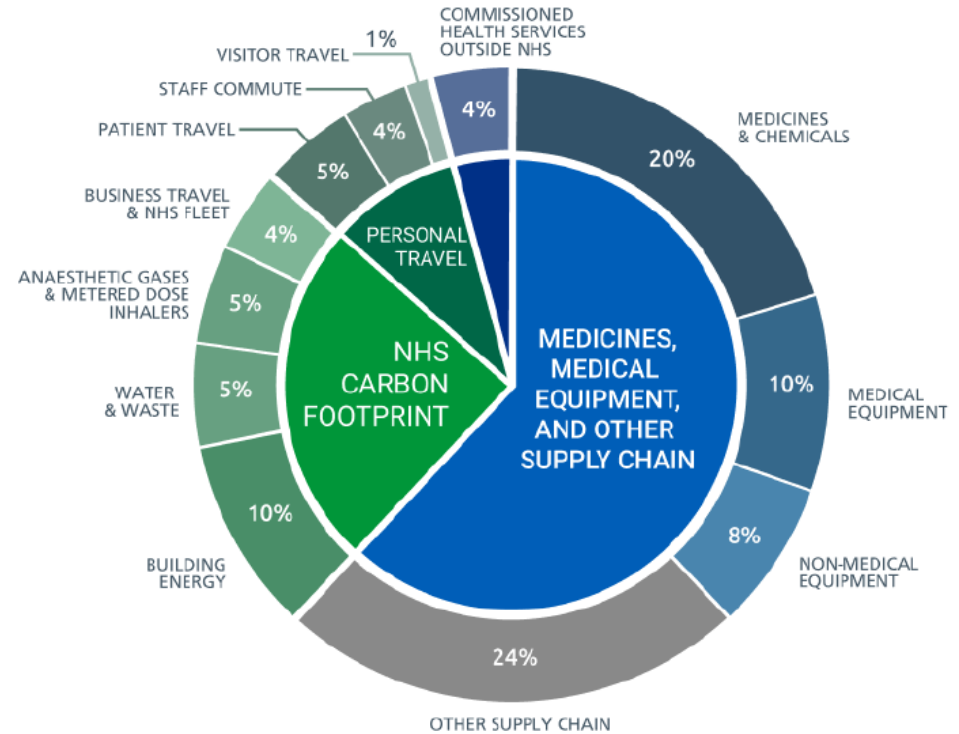
## Delivering a 'Net Zero' National Health Service



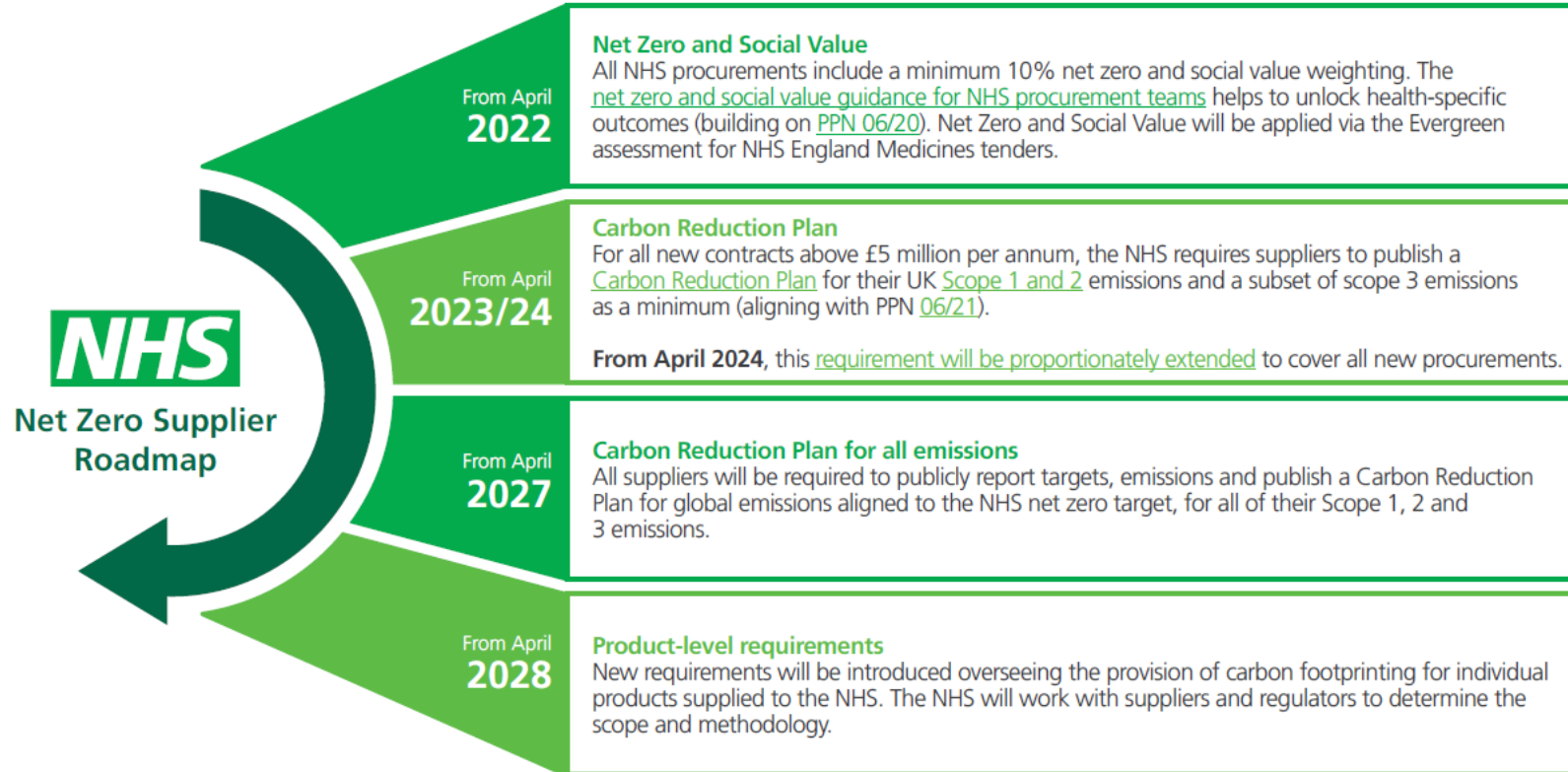
# NHS ENGLAND NET ZERO BY 2045



**Figure 2: Sources of carbon emissions by proportion of NHS Carbon Footprint Plus**



# NHS Net Zero Supplier Roadmap





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**THANK YOU**

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