

ABHI

MANIFESTO FOR HEALTHTECH 2019

Helping the Sector and the NHS Thrive Together



INTRODUCTION

ABHI IS THE UK'S LEADING INDUSTRY ASSOCIATION FOR HEALTH TECHNOLOGY (HEALTHTECH)

ABHI supports the HealthTech community to save and enhance lives. Members, including both multinationals and small and medium sized enterprises (SMEs), supply devices and diagnostics from syringes and wound dressings to surgical robots and digitally enhanced technologies. We represent the industry to stakeholders, such as the government, NHS and regulators.

HealthTech plays a key role in supporting delivery of healthcare and is a significant contributor to the UK's economic growth. HealthTech is now the largest employer in the broader Life Sciences sector, employing 127,400 people in 3,860 companies, with a combined turnover of £24bn. The industry has enjoyed growth of around 5% in recent years. ABHI's 300 members account for approximately 80% of the sector by value.

MANIFESTO FOR HEALTHTECH

It is just two years since we last published a Manifesto, yet in that short period of time the opportunities for our sector to contribute further to the health and wealth of our country have increased exponentially. The NHS has published its bold, ambitious Long Term Plan, redefining health and care services in our country for the next decade and beyond. As well as an admirable evidence-based stance on prevention and its forward-looking approach to innovation, the Plan also acknowledges areas where we need to do better.

For its part, the industry is rapidly delivering on the promise of "digital." New technology underpins exciting and important developments in 3D printing, robotics and earlier and more accurate diagnosis. More traditional HealthTech continues to deliver high quality, cost-effective care for millions of NHS patients every day.

There are, of course, challenges. The NHS continues to operate under serious financial pressures, and the lack of capability and capacity in the care sector places ever-increasing strain on our acute services. The NHS Long Term Plan, alongside the capability of the HealthTech industry, offer some cause for optimism. New ways of delivering care, however, demand new methods of regulation, assessment and finance, and the approach to collaboration between industry and the NHS is in need of modernisation.

This Manifesto lays out six big ideas, which can not only help the NHS deliver its Long Term Plan, but can help an important, innovation-driven industrial sector thrive in the global marketplace.

SIX BIG IDEAS

ON SPREADING INNOVATION

Our [work with the Nuffield Trust](#) in 2017 taught us that a significant barrier to the adoption of innovation is the fact that it is nobody's job. NHS Trust Boards see regular metrics on finance and performance, quality and safety, and workforce, with Executive Directors responsible for these important areas. As part of their "Well Led" inspection framework, NHS organisations are required to have robust systems and processes in place for learning, continuous improvement and innovation. But, with few exceptions, nobody at a Board level holds this portfolio.

- › ABHI believes that every NHS Trust should appoint a Board level Chief Innovation Officer.

ON DATA SHARING

One of the great opportunities for the NHS to realise its desire to become the most innovation friendly health and care system in the world, is through the use of data. The NHS is the largest single-payer health and care system in the world. Harnessing the power of the data it holds to improve the treatment of individuals and provide a testbed for research into new treatments is a noble ambition. We understand that people are anxious about how their private and personal information is used, and the basis for health and care data ownership and consent must be transparent. The first step in creating an NHS that can be truly "digital first" is gaining the confidence of the people it serves.

- › ABHI believes that funding should be made available for a public communications programme, informing citizens of the benefits to themselves and others of sharing data in the development and adoption of new technologies and treatments.

ON FUNDING INNOVATION

It is imperative that the NHS obtains the best possible value for each pound of tax payer's money it spends. Too often though, the approach taken is to focus on cost and not value. Products, such as examination gloves, can be too easily regarded as commodities when they are actually critical to the safety of both patients and health care workers. Diagnostics can be similarly undervalued, when their appropriate, early deployment can avert a plethora of downstream costs and ultimately improve patient outcomes. A holistic strategy that recognises the whole system benefits of investment in diagnostic technologies is needed. Such a strategy should allow system savings generated to be reinvested in diagnostic services themselves. For all technologies, the NHS should pursue a more strongly data-driven approach to procurement, and utilise the whole systems thinking inherent in Integrated Care Systems to inform the intelligent, outcomes-based procurement of HealthTech. For the newer generation of rapidly iterating, digitally-based technologies, flexible processes and payment criteria will need to be developed, including budgets that span discrete clinical pathways

- › ABHI believes that new approaches to payment should be co-developed with industry to allow value based, risk share and outcomes-based models to simultaneously facilitate the accelerated uptake of innovation and deliver best value for the NHS.

ON REGULATION OF NEXT GENERATION HEALTHTECH

The regulation of HealthTech continues to evolve across the world, taking account of the pace of development of technologies, whilst ensuring a robust and considered balance between risk and benefit. The challenges faced by industry and regulators alike in this ever-changing environment are serious and significant. Cost and capacity constraints threaten the presence of thousands of established products on the market, and new generation technologies bring a new set of potential issues. If the iteration of traditional devices is rapid, that of those based on deep learning is instantaneous. Safety standards can never be compromised, but new regulatory models can accelerate patient access to innovation. Programmes such as those based on the confirmation of Ethical Business Practice by innovators, take a more organisational and principled based approach to regulation. This process is more conducive to digital health technologies, allowing streamlined approaches, whilst still protecting patients through appropriate, risk-based levels of oversight.

- › ABHI believes that an appropriately constituted Digital Regulation Working Party should explore the applicability of such models of regulation.

ON TRADE

The potential for the HealthTech sector to support the economic growth of the UK is considerable. Exports of medical devices from the UK increased from £4.5bn in 2015 to £4.9bn in 2016. There is a huge opportunity for this growth to continue and even accelerate, with the global HealthTech market set to grow from \$364.4bn in 2017 to \$529.8bn by 2022. Uncertainties over our future trading status, and a reduction in the amount of Government funding to support companies on overseas missions, threaten to inhibit the ability of many smaller companies to realise their full growth potential. There is considerable experience and expertise that exists within both Government and Industry Associations, such as the ABHI. A degree of coordination, an increase in support for individual companies and the number of HealthTech specialists in overseas Consulates and Embassies, could all present a significant return on investment for the UK.

- › ABHI believes that industry and Government should work together to launch a "HealthTech Export Campaign," a long-term, appropriately resourced, strategy for UK companies, focussed on the most receptive and accessible countries and led by market specific HealthTech champions.

ON NURTURING THE UK HEALTHTECH SECTOR

The UK has much to offer the sector, from its world-leading Universities and reputation for science and innovation, to the commitment of successive Governments to initiatives designed to expedite the uptake of technology by the NHS. Set against this, the system is often regarded as poorly signposted and complex, with procurement activity focused disproportionately on short-term, transactional relationships with suppliers. The motives of industry are often viewed with suspicion, and small companies, in particular, feel that there are clear policy initiatives to nurture them on the one hand, whilst on the other, the business environment of the NHS seems intent on putting them out of business.

- › ABHI believes that the Government should appoint a high profile, cross-government HealthTech Champion to address policy anomalies and foster an easily accessible, integrated system that can support technologies from discovery and development to adoption and spread.

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