

A close-up, macro photograph of a microscope lens. The lens is cylindrical and metallic, with a yellowish ring near the bottom. The background is blurred, showing other parts of the microscope. The lighting is dramatic, highlighting the texture and reflections on the metal.

BUSINESS SWEDEN

HEALTHY CHOICES

HOW SWEDISH HEALTHCARE COMPANIES CAN MAXIMISE GROWTH
IN THE WORLD'S LARGEST SINGLE PAYER HEALTHCARE MARKET

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INTRODUCTION

A PLAN FOR THE FUTURE

The recent challenges to healthcare systems across the globe have escalated the need to implement long-term strategies that can meet the demand of increasing populations and growing prevalence of chronic diseases while also being able to react to and maintain levels of care during times of crisis. As the world's largest single-payer healthcare system in the world, NHS England faces challenges common to most providers, but often on a larger scale.

Even before the current crisis, NHS England had already set into motion an ambitious long-term plan for becoming a digitalised, data driven and outcome focused service provider. The long-term plan is supported by the largest cash settlement in the history of the NHS and puts the organisation on a path to redesign and transform its services to meet the changing healthcare needs of today, and tomorrow's society. The cornerstones of the plan are clear with patient focused objectives aimed to care for the population for the duration of their lives by:

- Making sure everyone gets the best possible start in life
- Delivering world-class care for major health problems
- Supporting people to age well

While 2019–20 was outlined as a transition period, some ambitions have been accelerated by the impact of the Covid-19 pandemic. The work towards making the plan come to life will continue and regional operating plans are currently being co-created by the NHS and its collaborating partners.

To deliver on the ambitious but realistic goals, NHS England are committed to collaborations with partners who can bring valuable tools and solutions to the table. Within the NHS, Swedish healthcare companies and products enjoy a reputation for providing high quality and cutting-edge technology and this solid foundation is the perfect launchpad to further deepen stakeholder relations.

However, the NHS is a complex system and is sometimes perceived by Swedish companies as difficult to understand – especially when it comes to finding out how to access the wide range of diverse organisations with different roles and responsibilities. Consequently, many companies struggle to establish their presence in the UK and reach their full potential in the market. Companies that put effort into understanding the market, how their product fits into the system, and who their buyers are, have a significantly higher chance of succeeding in their international expansion.



CHALLENGES AND OPPORTUNITIES

REALISING AMBITIOUS GOALS

Investment in innovation, digitalisation and efficient purchasing are high on the priority list for NHS England, and this urgency is reflected within many healthcare markets. The specific market conditions within the NHS means change is often slow and laborious. And while the goals of the long-term-year plan may seem modest in their simplicity, the implications for delivering cradle to grave healthcare, free at the point of service, are vast and costly. However strategic investment has already started to meet the goals which are set to become a reality in the next five years

A FUTURE DRIVEN BY DIGITALISATION

As with most healthcare systems around the world, NHS England needs go beyond improvements, to transform both administrative and clinical practice to take advantage of the global digital revolution. This means a move away from reactive practice to a preventive data-driven healthcare model that can meet the demands of changing population demographics and deliver better outcomes for patients. Three major areas stand out as potential challenges for the NHS in transforming their services to meet the demand of today's society:

- 1** As technologies shape the future of health, better utilisation of technology and data will be central if the improvements set out in the long-term plan are to be achieved. The digitalisation of the NHS aims to reach a digital first approach for patients, which, will allow patients to proactively manage their own health and identify symptoms early to help prevent the onset of disease.
- 2** Transformation into a person-centred service model is set out in the plan and will be achieved by starting with the individual, identifying needs by preferences and aspirations on how they want to be supported throughout their

lives. Personalising services across the NHS will be a complex process as transforming multiple systems and processes will need to occur.

- 3** Meeting goals to implement change to lower cost and reduce waste in staffing, estates and equipment while still delivering the same or higher standard of quality.

Digitalisation has secured strong investment and prominence in the long-term plan which will cover nearly all aspects of both the operational supply chain and patient pathway. However, the Covid-19 pandemic has been the catalyst for digital leaps across the healthcare provision ecosystem and maybe accelerate the already established goals set out in the NHS England long-term plan. This is not limited to the UK, but it is a market that has the potential to set global standards given its sheer size and capacity.

The NHS has investment plans to upgrade technology so that all secondary care providers will become fully digitalised by 2024, including the full implementation of electronic health records. Further, NHS England has promised that over the next five years, every patient will have the right to online 'digital' GP consultations, with projected estimated savings for the NHS of over 1 GBP billion per year (in averted new expenditure by avoiding up to a third of current outpatient appointments). The plan further promises efficiencies to drive down NHS administrative costs by 700 GBP million by 2023/24.

To achieve this, NHS England will need to collaborate with external partners. Sweden's proven digital health ecosystem is of great interest to the NHS and Swedish companies with expertise and technological solutions are in a prime position to support development and implementation. Companies who establish a presence in the UK will have a distinct advantage and be able to engage with key decision makers at both national and local levels.

“Our digital-first approach means that we want to mainstream digitally enabled care across the NHS – such as receiving advice, managing appointments, having consultations and order repeat prescriptions. We want to give patients the tools so that they can manage their own health to a larger extent. LIVI (Kry) is a great example of a Swedish solution helping us with this.”

Phillipa-Rose Hodgson, NHS Online Digital Delivery Lead at NHS England

Digitalisation is making progress and one example of a step towards achieving this is the NHS app which offers more convenient access to some services. However, it is far from being fully developed. The long-term vision for the app aims to gather data that supports a more comprehensive analysis of the population which will drive improvements to NHS services. It is the NHS’s intention to expose the app’s APIs to build an ecosystem with a goal for it to become a platform for innovation.

However, there is recognition from within the NHS that the digital transformation will only be realised if the NHS works closely with CCGs, GP practices, local authorities as well proactively engaging and collaborating with external partners.

Within the digital landscape, there are opportunities for solutions to provide:

- New features to improve the NHS App
- Advance communication technology for staff
- Monitoring tools for doctors to track progress
- Provide tools supporting clinical transparency
- Develop predictive diagnosis tools through AI

ACADEMIC HEALTH SCIENCE NETWORK (AHSN) FOR SOUTH LONDON

AHSN supports companies who provide digital or technology solutions or medical equipment to access relevant NHS departments. Their remit has shifted since the global pandemic and they are primarily focused on Covid-19 projects. They aim to drive lasting improvements in patient care by sharing innovations across the health system and capitalising on teaching and research strengths. AHSN has a number of programmes that companies can apply to. Each application is assessed against their innovation criteria to help accelerate those solutions and products that can offer improve patient care, deliver cost savings and drive economic growth.

Lesley Soden

Programme Director – Innovation Theme at Health Innovation Network, Academic Health Science Network for South London

“The NHS values evidence, products that meet a need, and working with companies that can support implementation of innovation. Understanding clinical pathways, what transformations are required, and how this can be integrated into the current platforms are essential requirements if companies are going to work successfully with the NHS.

The current healthcare pandemic has shifted our focus from innovation to immediate solutions that are tackling the burden of Covid-19, but there is still planning for the future and how the NHS systems and operations can be better prepared.

The increased demand on mental health services has highlighted the need for innovation. Many services are moving online and with the current strain, there is a need for solutions that can help more people, retain or better existing levels of patient care, while also being cost effective.”



Lesley Soden

PREVENTION: A LIFE AND COST SAVER

To deliver on these ambitions, the NHS aims to take a clear, preventive and personalised approach. NHS England will focus on major conditions prevalent in England. Top clinical priorities set out by the plan include cancer, cardiovascular disease, maternity and neonatal health, mental health, stroke, diabetes and respiratory care. Children and young people's health have also been mentioned as particularly important.

"People in the UK are increasingly demanding more personalised care so we definitely have a demand to meet. We got a dedicated partnership team and a wide range of stakeholders, and we are always interested in finding new partnerships."

Rich Watts, Strategy Lead for Personalised Care at NHS England

The above areas also represent the key areas of investment outlined in the long-term plan:

- Preventive care spending on primary medical and community health services will be at least 4.5 GBP billion higher in five years
- A new investment fund of at least 2.3 GBP billion will enable mental health services to grow faster than the overall NHS budget
- In the same period, 2.5 million more people will benefit from personal health budgets and new support for managing their own health.

Additional areas of investment include NHS staff, an upgrade of the NHS's technology and a strong digital shift, as well as funding to secure a sustainable financial path for the coming years.

OXFORD ACADEMIC HEALTH SCIENCE NETWORK

Oxford Academic Health Science Network is an innovation exchange working with individuals and companies who have ideas for transforming clinical practice, and improving patient safety, outcomes and experience, and generating economic growth through collaboration between the NHS, industry and universities. The Network aims to secure early clinical involvement so companies can carry out real world valuations and build a strong business case. Adoption of scale is also an area of focus, and through three separate programmes, Oxford Academic Health Science Network works with companies who have a strong clinical and financial case to get innovation adopted at scale.

Paul Durrands

Chief Operating Officer, Oxford Academic Health Science Network

"Navigating the NHS is difficult, and companies must have a strong business case, know how to get commissioned, and how to scale their product or service. Unlocking the first door is always the hardest. Once successful implementation has happened in one area of the NHS, others are more willing to try or adopt it.

Proven success in Sweden doesn't always translate, as patient pathways may differ or the need for local evaluation becomes a barrier. But these hurdles can be overcome by accessing grants, building relationships with Trusts, demonstrating value and cost efficiencies, and getting their product or solution used in the UK.

Historically, change in the NHS has been notoriously slow. But in the past six weeks, the primary healthcare system seems to have changed more than in the past 15 years. There is huge interest in tools that optimise the primary care case, and that make the most of the GP consultations. The speed of recent change shows that it can happen, that the system can cope. In the area of mental health, the impact of Covid-19 means remote consultations have become acceptable, removing deeply entrenched barriers that have prevented change in the past. However, remote consultation is not right for all our patients and we need to carefully listen and evaluate new ways of working."



Paul Durrands

PURCHASING POWER CONSOLIDATED

As global strategies emerge to deal with the challenges facing healthcare provision, this is creating the need for strategic assessment and procurement at a macro level. Within the NHS England framework, this means there will be accountability for adopting standards of best practice at board, governing body and local integrated care system (ICS) level. A critical part of this success will be the shift towards the centralised procurement organisation, Supply Chain Coordination Limited (SCCL). This will enable the organisation to leverage its significant purchasing power to reduce overall expenditure, and by 2022, deliver on the specific aims of:

- Doubling the volume of products through central procurement to 80% – the current annual spend on hospital consumables is GBP 6 billion by NHS England alone
- Extend the number of nationally contracted products, and
- Consolidate the way procurement teams operate.

Reducing duplication during the delivery of clinical services and in procurement is a critical area which will support the long-term goals. Currently, there is a lack of technology alignment between hospitals, GPs and pharmacies. The introduction of electronic patient records and integrated administrative systems will provide shared insights into conditions and enable accurate data-driven decision support for treatment options. Integrated systems and shared information will also improve procurement to save money by the NHS fully leveraging the combined buying power.

The ultimate goal for the NHS is to improve patient services, and these measures aim to support that by improving the quality of data and information that local systems and providers have access to, which can inform their purchasing needs and practices.

“This year will definitely be a big year and we’ll see a lot of things happening. I see a lot of opportunities for improvement when it comes to NHS staff, both in training and other support that offers them a more efficient way of engaging with communities.”

Jennie Symondson, Project Manager at NHS England & NHS Improvement

UCL PARTNERS

UCL Partners are a partnership of world-leading academic and clinical research centres, NHS organisations, industry, patients and others. We aim to harness research and innovation for excellent patient care and a healthier population. Their purpose is to translate cutting-edge research and innovation into measurable health and wealth gain for patients and populations – in London, across the UK and globally.

Dina Makar

Health Technology Advisor, UCL Partners

“When you pitch your product to the NHS, make sure you have a clear and compelling value proposition, which must include how your product solves a significant and defined problem in the NHS. This very basic requirement is used commonly as a starting point in health technology appraisals within the NHS.

Cost is a critical deciding factor in the NHS, so ensure that you can demonstrate cost-effectiveness in relation to current clinical practice. NHS Commissioners will want to know: what is the cost saving to the NHS and what is the return on investment? There also needs to be a good understanding of the workings of the NHS, so you can approach the right budget holder for your product.

The impact of COVID-19 cannot be overlooked and any technology or digital application that can optimise workflow, support remote monitoring or diagnosis, or self-management of long-term conditions, is of interest now, and will continue to be long after the current healthcare crisis.”



Finally, as the largest employer in the UK, the power and importance of the workforce cannot be underestimated. To increase staff retention, the long-term plan lays out a strategy to make the NHS a better place to work, as well as enabling staff to better use their skills through additional training and support. Swedish companies who have experience and knowledge in these areas are in a strong position to support to help drive efficiency improvements through services and products that:

- Develop integrated administrative systems
- Improve procurement procedures
- Develop interactive face-to-face training
- Provide networking pathology and diagnostic services



THE NHS NEEDS:

1

Integrated cross-functional technology and innovation that addresses structural solutions

2

To make the NHS accessible and empower patients to own and drive self-care

3

Digital solutions that empower physicians in clinical and administrative functions

4

Improved digital management functions that enable efficient resource and workforce allocation

5

A proven and fast business intelligence command centre to manage capacity and waiting times in A&E



SWEDISH COMPANIES NEED TO:

1

Identify the purchasing owner for their product

2

Provide an evidence-based case for the product's clinical value

3

Demonstrate a compelling financial case on the whole cost of expenditure

MARKET ENTRY STRATEGY

THREE STEP APPROACH TO NAVIGATING THE COMPLEX MAZE OF THE NHS

While there are clear and vast opportunities for Swedish companies interested in supporting the NHS in becoming more digital, personal and effective, the NHS remains a complex system and companies interested in supporting the NHS need to be prepared before attempting to engage with stakeholders.

- 1** Identify who your customer is, who is going to raise the order, and push it forward
- 2** Define how they benefit from your solution, present evidence of these in a powerful and compelling way to identified customers
- 3** Make a compelling economic case by highlighting savings potential of available funds

“You have to be very specific when approaching the NHS – you need to break it down to know exactly who and what level you are selling to, who is your audience and why, what funds are available and how to access the money. It really is hard for anyone to understand who to contact and what to approach them with – but if companies do their pre-work there are plenty of funds and NHS organisations constantly looking for new innovations”

Phillipa-Rose Hodgson, NHS Online Digital Delivery
Lead at NHS England

KEY TAKEAWAYS

NHS-SWEDEN INNOVATION SYMPOSIUM

On the 11th and 12th February 2020, Business Sweden held a symposium between the NHS England and Sweden as part of our work to support Swedish MedTech and healthcare companies grow revenue, expand into new markets, and strategically position themselves to seize large global opportunities.

The NHS-Sweden Innovation Symposium brought together some of Sweden's most innovative and forward-thinking healthcare companies to meet key stakeholders within the Swedish and British healthcare systems.

Rapid change is sweeping across the NHS, which is now being accelerated by the current global healthcare pandemic, and innovative companies are being sought to support the transformation. During the symposium, Blake Dark, Commercial Medicines Director at NHS England and the person responsible for the approximate £18 billion budget for medicines, highlighted the following six areas, all part of the NHS long term plan, as particularly important for the NHS continual development:

- 1 New service models**
Funding programs to upgrade technology and digital enabled care, including expanding and facilitating accessible, self-care
- 2 Primary care networks**
Provide patients with more options for better support delivered at the right time, in the optimal setting
- 3 Improve population health**
Open to partnering on large-scale clinical trials in areas such as obesity, smoking and medicine access to help reduce health inequalities and increase preventive care
- 4 Improvements and outcomes**
Increasing the quality of care and ageing process for individuals with cancer, poor mental health, diabetes, co-morbidities, and cardiovascular and respiratory conditions as well as early prevention with children's health
- 5 People plan**
Efficient and productive use of NHS staff and expertise to alleviate workforce pressures and support staff to have long, meaningful careers
- 6 Best use of NHS resources**
Maximise every single pound spent on medicine, facilities and equipment to put the NHS back on a sustainable financial path

CONTACT

GROW YOUR FUTURE IN GLOBAL HEALTHCARE MARKETS

Many Swedish companies are already making an impact in the UK market and Business Sweden's unique position has been pivotal in:

- Supporting a MedTech equipment manufacturer to grow revenues in the UK
- Assessment of the UK market potential for a large healthcare service provider
- Public affairs support to position a MedTech manufacturer as best-of-breed and securing deals, and
- Sales acceleration support for a manufacturer of orthopaedic implants

Contact our team today to learn about opportunities within the NHS, how to engage key stakeholders and expand globally.

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