

# UK Healthcare IT

The UK has a strong market for healthcare technologies and services. Spending on healthcare IT in 2009 was around £2.8 billion and is expected to grow as technology is deployed more widely to reduce costs and improve services.

Source: Kable 2009

## Telecare/Telemedicine

Although Telehealth and Telemedicine are still in their infancy, the UK is the largest market in the EU and one of the largest globally, valued at over £140 million per annum. Telecare uses technology to manage chronic conditions such as diabetes and heart disease. With over 17 million people in the UK likely to suffer one or more chronic conditions by 2051, this is rapidly becoming an interesting market.

## Technology for Healthcare Services

Key growth areas include increased use of outsourcing and shared services, which has seen a move away from in-house software development towards turnkey applications from specialist advisers; summary care records; mobility enablers such as mPhones; and asset and contract management systems. The NHS outsources ICT contracts worth nearly £1 billion per annum with many large long-term contracts currently in place. There are around 30 shared business services established in the UK, often referred to as 'Health Informatics Services'.

Whilst there has been minimal progress on green IT in the NHS this is expected to change and will focus on ICT waste reduction and energy use. Management of clinical processes, particularly in the acute sector, are areas of potential growth as is remote/mobile working and web based applications.

## Business Intelligence (BI) Software

The NHS in England is making increasing use of BI software to plan services and monitor quality. It has enormous potential to help align the provision of services.

## National Programme for IT (NPFIT)

Connecting for Health, the £multi-billion 10 year programme, is now beginning to deliver savings and improved services. The aim of the programme

is to connect over 30,000 General Practitioners to almost 300 hospitals in the UK, enabling patients to gain access to their personal health information. The programme also incorporates a secure national communications spine, digital X-Ray archiving and messaging system.

## Private Healthcare

The private sector is playing an increasing role in healthcare delivery providing services both directly to patients and, on contract, to the NHS. These healthcare specialists also need specific IT related suppliers.


## Access to Talent and Technology

Over 27% of UK jobs are ICT-related, one of the highest in the world. A key challenge and opportunity for the sector is exploiting the rapid evolution of technology. The UK, having three of Europe's top five Technology Universities and many other world-class Research and Teaching Universities as well as an extensive industry ecosystem, is well positioned to respond to the talent and technology challenges. Examples of world-class research strengths include: information security; intelligence management; network security; and search technology.

## Technology Financing

The UK venture capital market is the largest in the EU, accounting for 40% of European fund-raising, and second only to the US globally. The economic impact of the private equity industry is substantial and is continually growing. Supported at one end by networks of Angel financiers and at the other by Public Markets, raising finance to support robust business propositions is rarely an issue.

In addition, a large amount of Government R&D spending is focused on ICT research and Knowledge Transfer Networks help to stimulate collaborative R&D between academia and industry in UK and internationally.

A black and white photograph of a scientist in a white lab coat, seen from the side, using a magnifying glass to inspect a sample in a laboratory. The scientist is positioned in the lower-left foreground, looking towards a large, illuminated piece of equipment, possibly a microscope or a specialized imaging station, which occupies the middle and right portions of the frame. The equipment has several bright, glowing circular areas. The background is dark and out of focus, suggesting a laboratory environment. The overall lighting is dramatic, with strong highlights from the equipment and the scientist's coat.

“I was aware that there were organisations in the UK with the capabilities we were looking for. Technology was the critical factor in our partnership search.”

**Shira Yair**  
Head of General Manager ProtAb