



SPOTLIGHT ON... ONCOLOGY

Achieving growth as part of NHS England's pandemic recovery and innovation drive

A long-term plan and opportunities for investment, innovation, and collaboration

As the world's largest integrated health system and fifth largest global employer, NHS England manages one million patients a day which gives unique unified clinical data assets on well-defined patient groups. While this unrivalled position places the NHS in a strong position for research and development, it is also under considerable pressure to deliver clinical innovation, meet operational objectives, and improve and embrace HealthTech.

The NHS is serviced by approximately 1.7 million staff, however like many healthcare systems around the world, the pandemic has put substantial pressures on resourcing to keep up with the huge surge in demand for critical care. Oncology is a critical treatment area, and the pandemic has further accelerated the need for the organisation to invest in technology and services that can restore services and resources and ensure resilience for the future.

The opportunities for Swedish companies in the UK healthcare market, particularly within the NHS and oncology services, are extensive; with a spend of GBP 130 billion a year, with GBP 6 billion dedicated to HealthTech, and long-term government initiatives aimed at innovation and R&D including a commitment of 2.4 per cent GDP, the equivalent of GBP 95 billion, the time to explore the potential is now.

Recovering from diverted resources

The impact of the pandemic has reverberated across the NHS, with cancer diagnosis, delivery of care, and access to services all being negatively affected. In hospital care and treatment was disrupted with many resources being redirected to the critical care needs of Covid-19 patients. Clinicians and patients were forced to consider the risks of delaying treatment, being exposed to the virus against the benefit of cancer treatment. This has resulted in an immediate need to accelerate and increase diagnostic and treatment capacity to higher than before the pandemic to mitigate the impact.

Early detection screening programmes were also put on hold and the urgent need to ramp up screening services to catch up on the disruption is still pressing.

The context of past, current, and future care delivery patterns is critical for Swedish companies to understand if they are going to be active partners within the NHS and deliver solutions that can meet both historical challenges but also the more recent issues that have been created by the pandemic. The post-pandemic landscape is also forcing the review of planned services to ensure capacity will be able to meet the inevitable surge in cancer diagnosis once screening and diagnostic services have recovered.

NHS Cancer Alliances

Cancer care is a strategic priority for the NHS and to meet the operational challenges at both local and national levels, a framework for meeting diagnostic and treatment goals has been implemented nationwide. Across England, 21 Cancer Alliances have been created to improve care locally and bring together clinical and managerial leaders from across trusts and health and social care organisations to transform the local cancer pathways.

The collective aims and objectives of the Alliances are to:

1. Encourage presentation for early diagnosis
2. Optimise and reduce variation in diagnosis and treatment
3. Provide high quality personalised support and care for all patients diagnosed with cancer
4. Restore services after the covid pandemic, and ensuring resilience to future waves

Funding agreements with NHS England and NHS Improvement (for both national and regional teams) have been secured for Cancer Alliances and these set out the funding they will receive to deliver against the key priority areas. In 2019/2020, funding for Cancer Alliances exceeded GBP 115.9 million and this figure is expected to increase to further combat the challenges caused by the pandemic.

While the scope for delivery is vast, Swedish companies who can partner with NHS providers to deliver rapid diagnostic services, remote monitoring, and improved screening processes will be in a strong position to play a role in meeting cancer care targets.

Connecting to supporting organisations a strategy for success

NHS England is a complex organisation that is supported by a vast array of supporting organisations and networks that help to maintain and exceed care standards as well as improve cost efficiencies. Understanding the role these networks play can define success or failure as part of a tender or collaboration process.

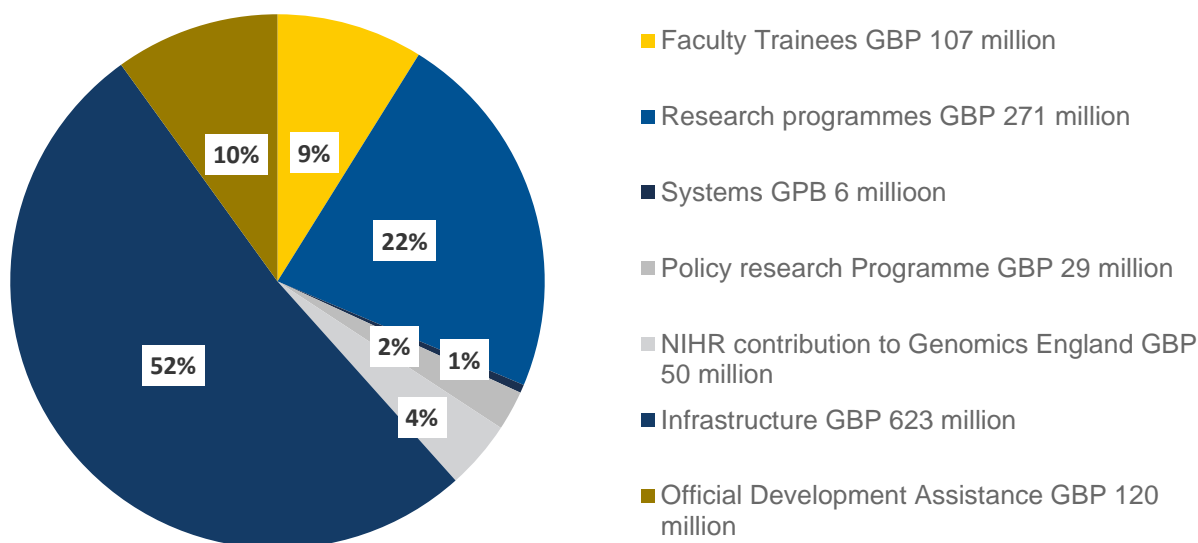
The Academic Health Science Network (AHSN) and the National Institute for Health Research (NIHR) are particularly critical.

The AHSN drives the adoption of innovative technology into the NHS and pathway changes and their programmes have the goals of improving lives, saving the NHS money, and driving economic growth. The 15 regional AHSNs are a valuable tool for Swedish companies and can offer substantial support in driving technological change with digitalisation solutions.

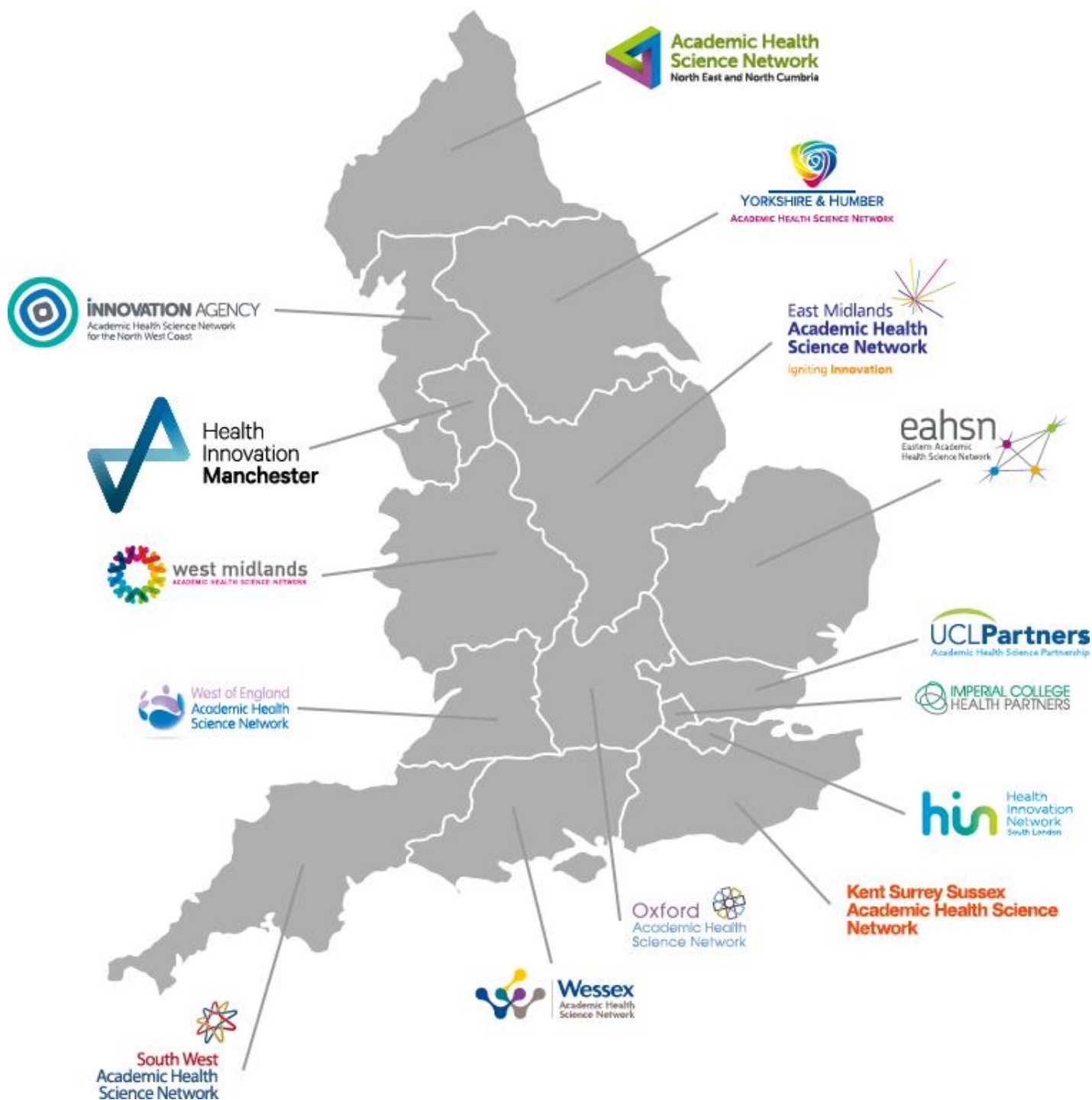
The NIHR supports industry with research in oncology is the largest funder of health and care research in the UK. With an overall drive to improve the health and wealth through research, the NIHR is a vital organisation supporting clinical research and management of clinical trials across the NHS and partner universities. This extends to supporting collaborative projects between industry, charities, academia, other funders and the NHS, as well as supporting the development of therapeutics, medical devices, in vitro diagnostics (IVDs), and digital technologies.

Both the AHSN and NIHR networks attract substantial funding and in the 2019/20 period attracted GBP 1,205.3 million to focus on their objectives.

NIHR Funding Allocation – 2019/20



The AHSN Network



NIHR offer to industry

The NIHR supports life science companies to translate their new therapeutics, medical devices, diagnostics, and digital technologies into the clinic environment and then onto market.

They provide a full range of support to innovators throughout their clinical pathway, from early-stage translational research through to later stage clinical trials in the NHS and social care settings.

NIHR oncology offer

- Biomedical research centres
- Clinical research facilities
- Experimental cancer medicine centres
- MedTech and in vitro diagnostic cooperatives
- NIHR National Patient Recruitment Centres
- Data provision, patients, and samples
- Research funding

Navigating the complex funding structures

The complexity of the NHS also extends to understanding the funding structures and scope for securing innovation and digitalisation investment. But with leading universities and a well-established R&D infrastructure including NIHR, AHSN, Innovate UK, and others, the potential for small and mid-sized Swedish companies cannot be overlooked. The government commitment of spending 2.4 per cent GDP means GBP 95 billion is earmarked for R&D.

SBRI Cancer Call

SBRI Healthcare is an NHS England and NHS Improvement initiative supported by the AHSN and managed by LGC Group. Based on the *NHS Long Term Plan*, early detection and diagnosis of cancer is a priority and in detail, this means focus and investment will prioritise partners who can deliver solutions that:

- Identify and test asymptomatic patients who are identified as most at risk
- Encourage early symptomatic patients to self-assess and present to primary care or other appropriate services
- Assess risk in early symptomatic patients presenting to primary care, and
- Increase/improve effective referral rates in historically low referral rate areas.

Diagnostic efficiency is also high on the agenda and there is a need to:

- Identify and triage of patients at the highest risk of developing cancer or, identify and triage patients with the greatest likelihood of benefit
- Increase diagnostic capacity
- Implement appropriate safety netting

Funding streams

NIHR program i4i and i4iConnect

- Product Development Awards not capped but up to GBP 15 million per round with two rounds per year
- i4i Connect up to GBP 150,000 per award, twice per year

NHS Artificial Intelligence in Health and Care Award

- GBP 160 million over three years, with two to three calls per year

NHS Innovation Accelerator program (NIA)

- NHS engagement program - no funding but c-suite access

KEY RECOMMENDATIONS

Swedish companies must take a strategic approach to identifying specific projects and areas of development and investment to actively participate in tender and procurement processes.

This should include:

- Identifying growth and development areas within NHS England's oncology framework where proven solutions can help deliver against targets
- Keeping up to date with the most relevant funding allocations and where new opportunities are arising
- Actively pursue relevant partners and collaborations that will boost attractiveness in procurement processes
- Understanding the funding programmes including how they will be added to both the national and local budgets

Our Business Sweden team in the UK are constantly mapping the opportunities, funding allocations, and tender processes, as well as engaging with key stakeholders.

CONTACTS



Charlotte af Klercker
Program Manager Life Science Ecosystem
charlotte.afklercker@business-sweden.se



Fanny Nordström
Consultant, London, UK
fanny.nordstrom@business-sweden.se

WEB: business-sweden.se/markets/Europe
LINKEDIN: [business Sweden Europe](#)

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BUSINESS-SWEDEN.COM

*BUSINESS SWEDEN Box 240, SE-101 24 Stockholm, Sweden
World Trade Center, Klarabergsviadukten 70
T +46 8 588 660 00 F +46 8 588 661 90
info@business-sweden.se*



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