

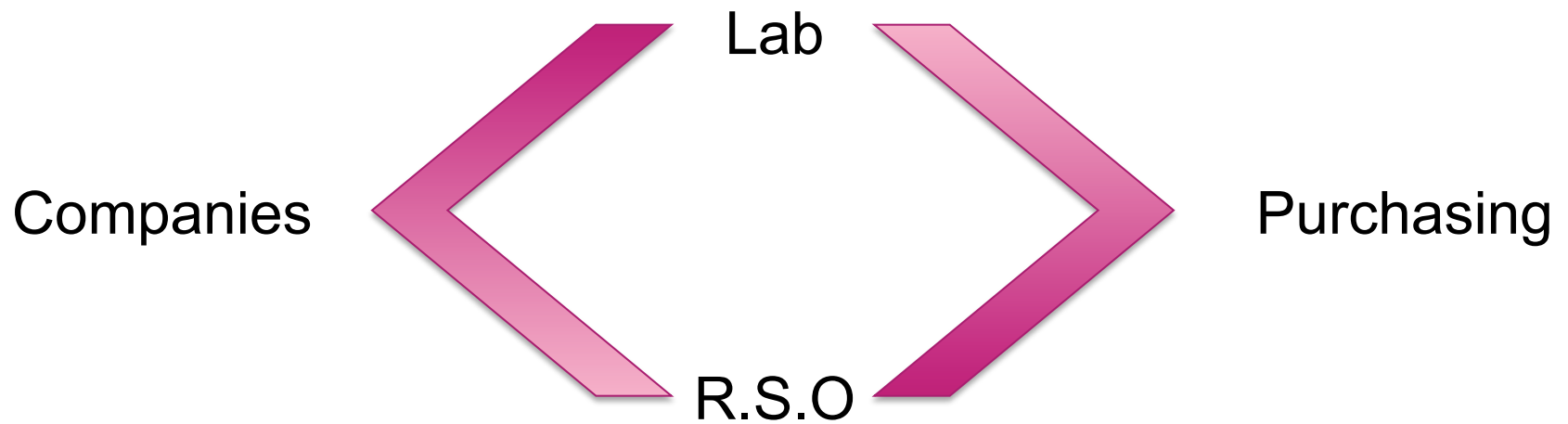


Who is the customer?
How government can support industry?
Changing the landscape / The Changing Landscape

David Horne, Alere Ltd



The good old days (ante POCT)



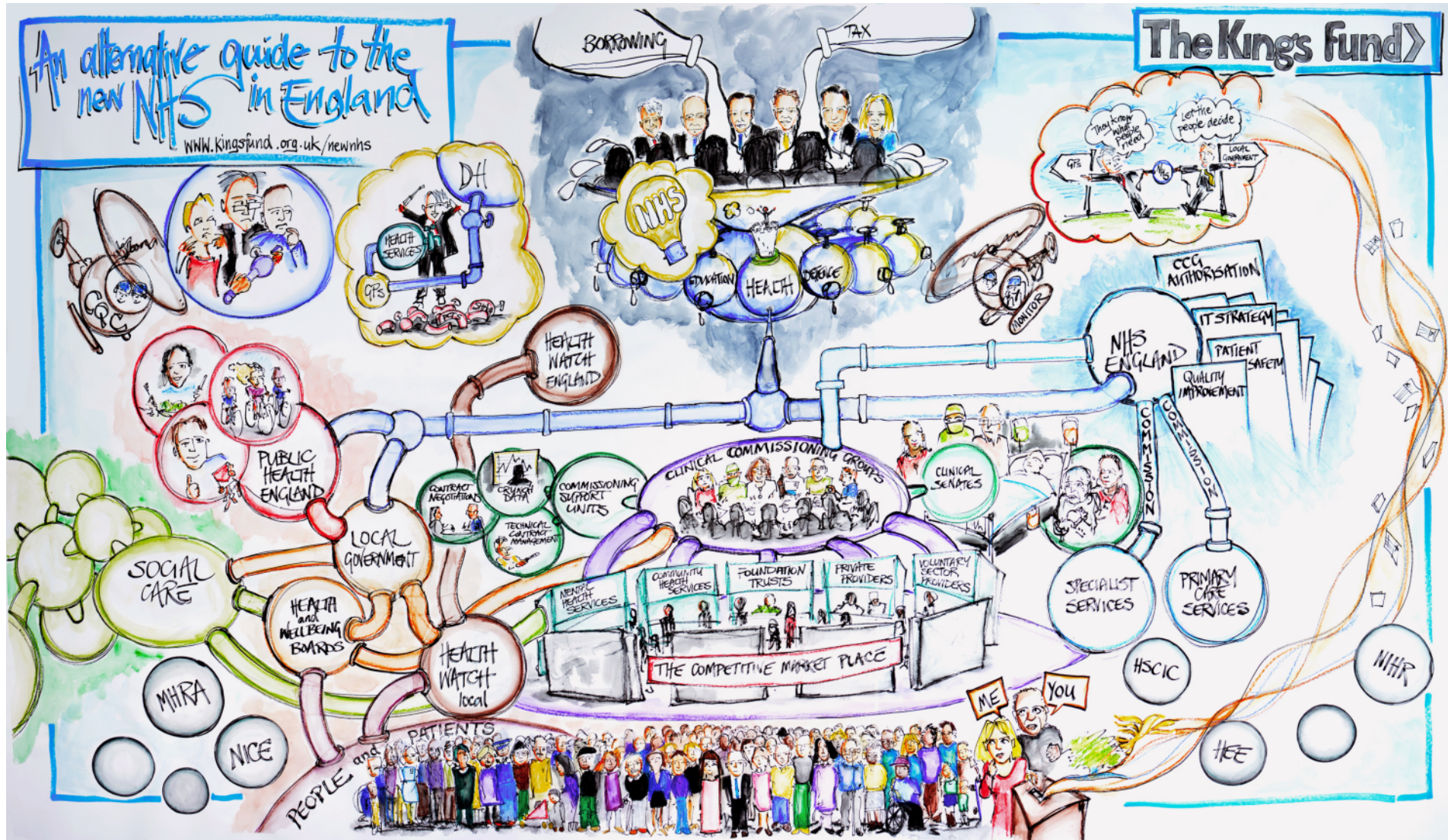


2009 - Progress?

The Innovation Landscape - POCT Market Access



An alternative guide to the new NHS





Landscape 2014

Who is the customer?

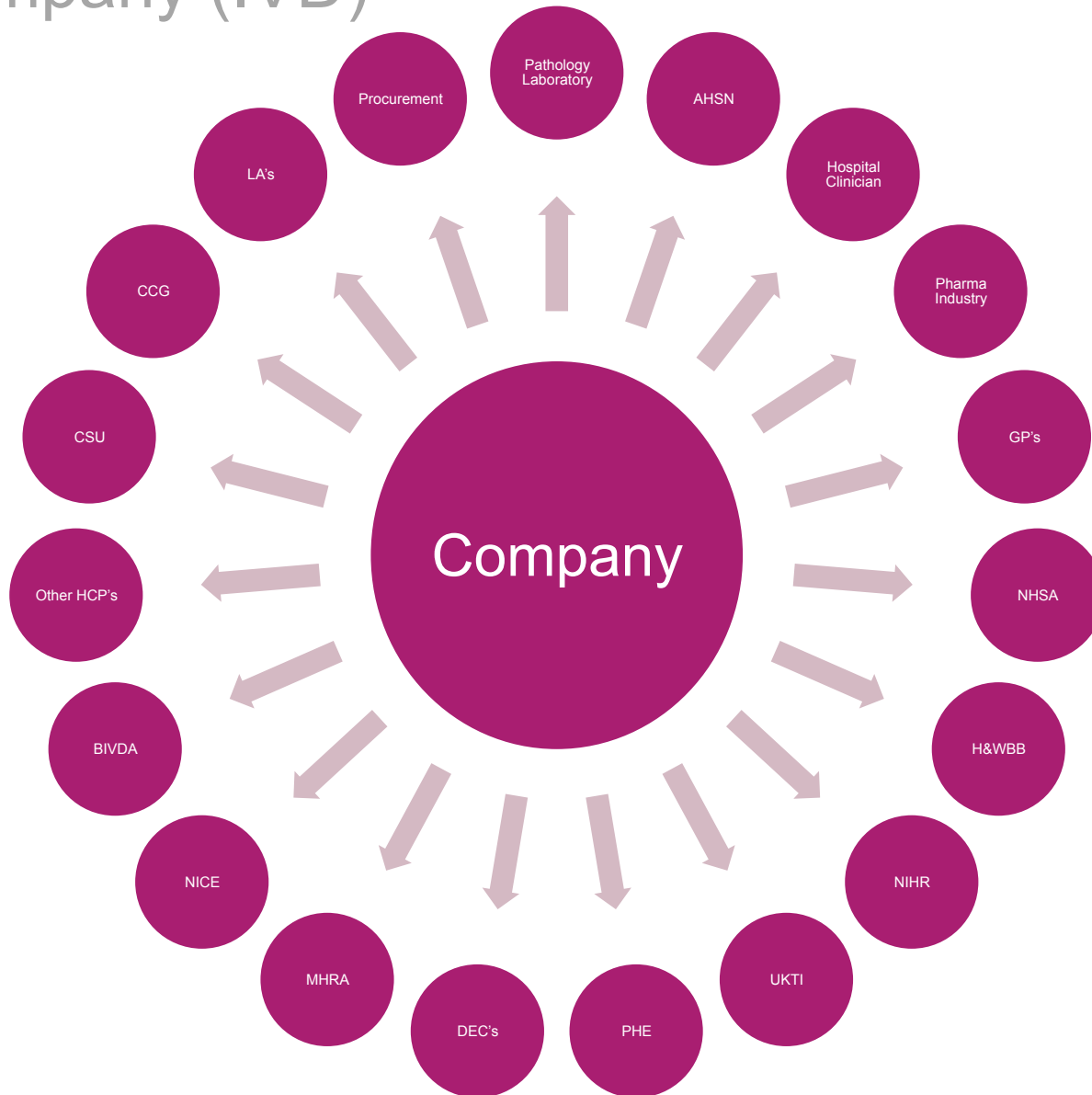
Depends where you

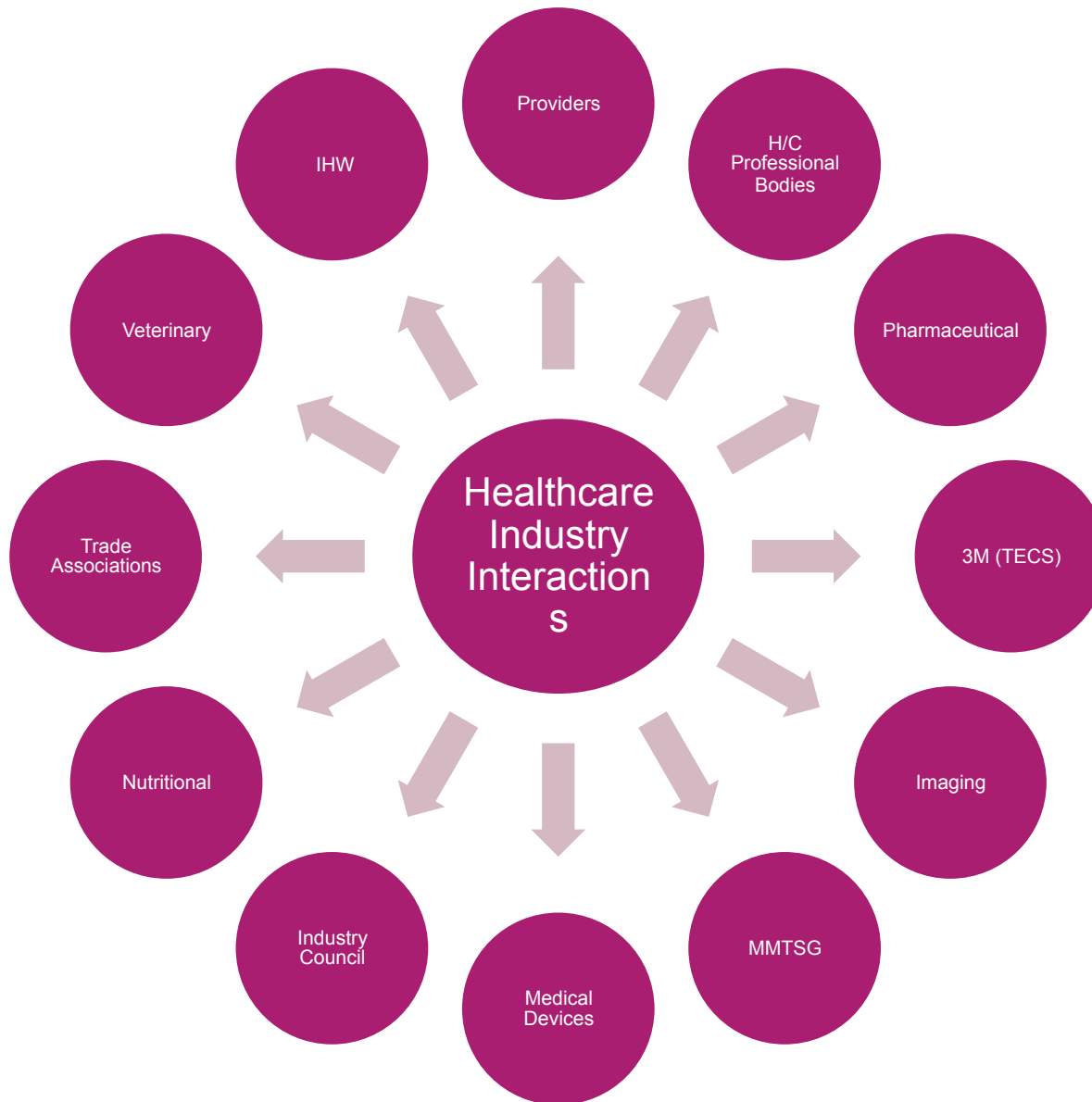
START...

Citizen (Patient)



Company (IVD)







Changing the landscape of Adoption

How government can support industry

- Help SME's!
- Help LE's
- Simplify the landscape
- Remove/Reduce the barriers



Help SME's

- IP (Patent Box)
- Funding (HICF, TSB, NIHR, AMSCI, EU)
- R&D Climate (Precision Medicine Catapult)
- Competitive tax rates
- DECS

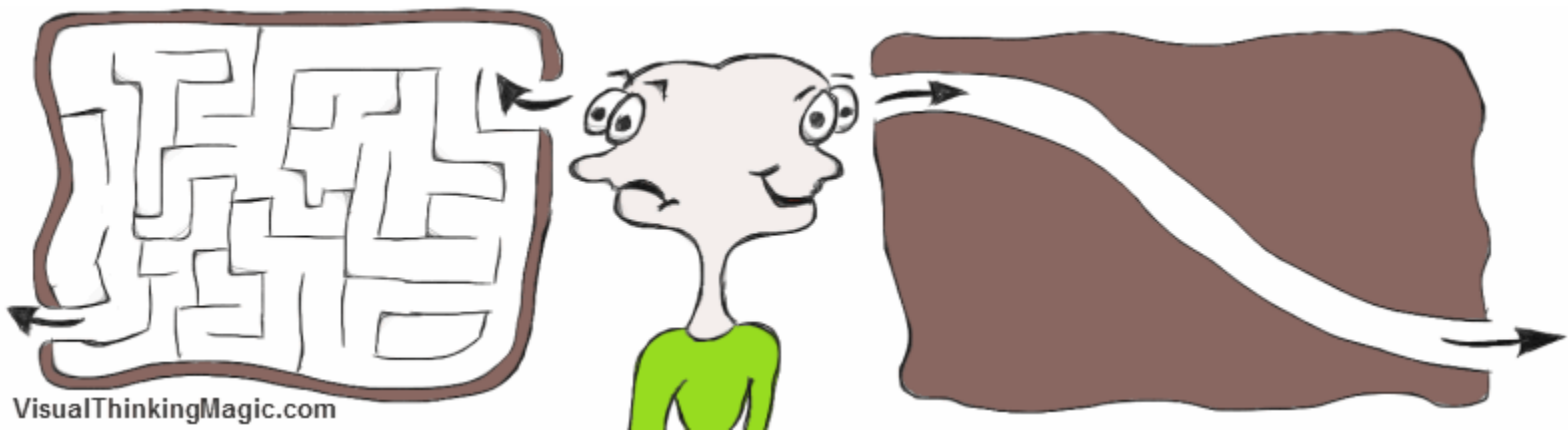


LE's

- Competitive tax rates
- Educated and competent workforce
- Positive attitude to industry
(Are we partners or adversaries?)
- Good transport infrastructure
- Work with DEC's across product lifecycle

Simplify the landscape (17 years)

1. AHSNs
2. DEC's
3. Commission intelligently at scale
(Commission by evaluation)
4. Procure intelligently at scale
5. Remove competition law barriers to NHS reconfiguration





Remove/Reduce the barriers (17 years)

- Think > 1 year
- Mandate more (“guidance” versus localism)
- Join 1° and 2° care into one organisation/one budget (ACO's)
- Commission around the patient journey – outcomes, patient experience
- Provider/Payer split



Remove/Reduce the barriers (17 years)

- Base all incentives/levers on outcomes
- Sort out IG issues
 - Data belongs to the patient not the NHS
 - Data must be shared (Data traps)
- Evidence - diagnostics are not therapeutics ---- but
- Incentivise adoption (innovation budget for AHSNs)
- Better clinical education regarding Pathology and IVD's



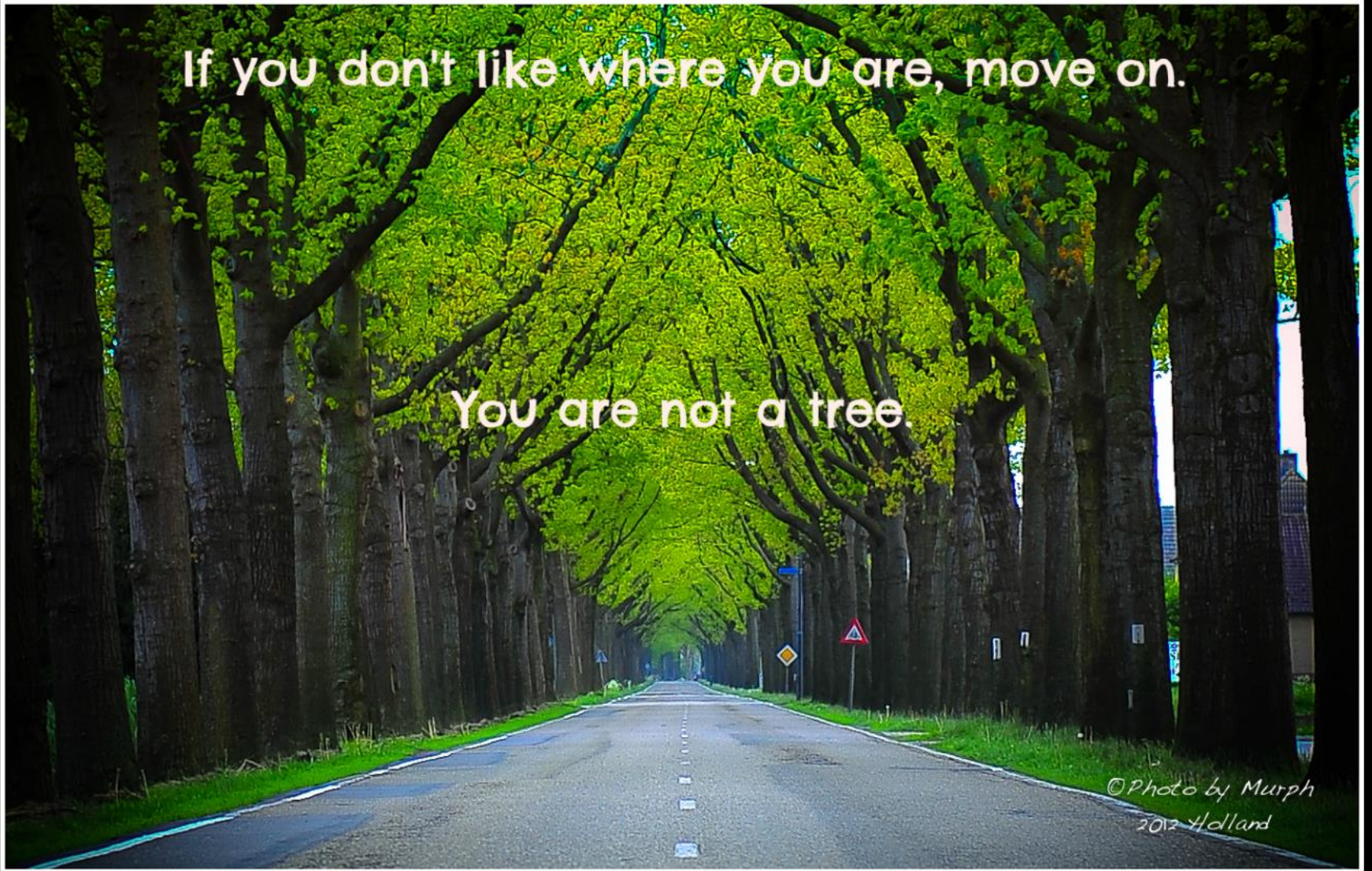
Industry needs to change too!


- > Transparency (pricing, HCP funding)
- > Evidence (Clinical outcomes/Health Economics)
- Learn to partner (joint leadership development, More secondment)
- More seminars like this
- Above all demonstrate value not price!

If you don't like where you are, move on.

You are not a tree.

©Photo by Murph
2012 Holland



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- A close-up photograph of several red ants working together to move a large, dark, textured object (possibly a piece of wood or bark) across a light-colored surface. The ants are positioned in a line, with some pushing and others pulling the object. The background is a blurred blue and white.
1. As transactional adversaries we will not make it work
 2. Together we can change the landscape and begin to address the barriers

Thank you - Any Questions?