

Who is the customer?

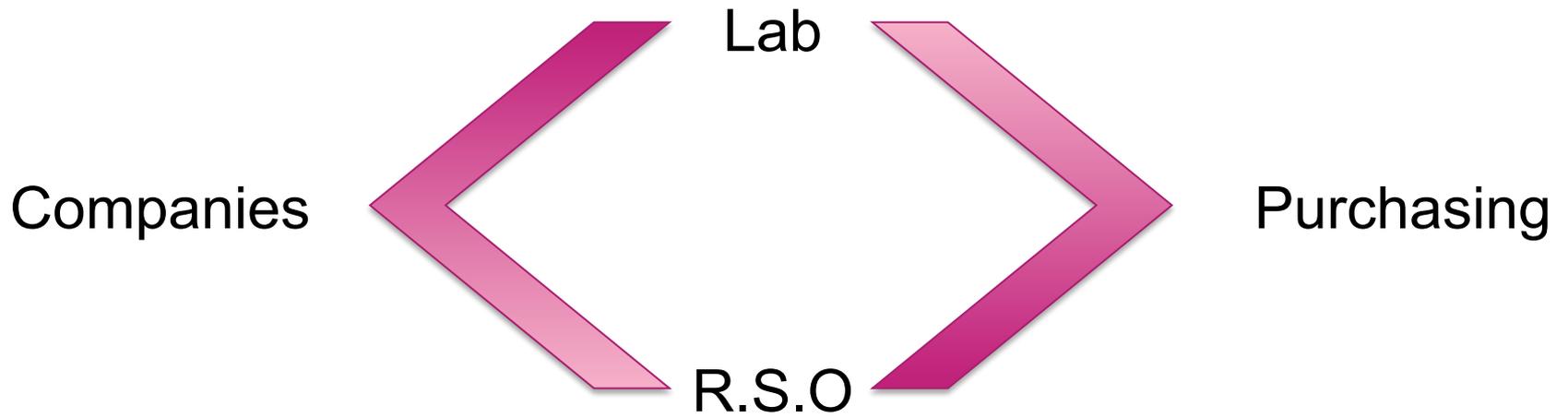
How government can support industry?

Changing the landscape / The Changing Landscape

*David Horne, Alere Ltd*



# The good old days (ante POCT)



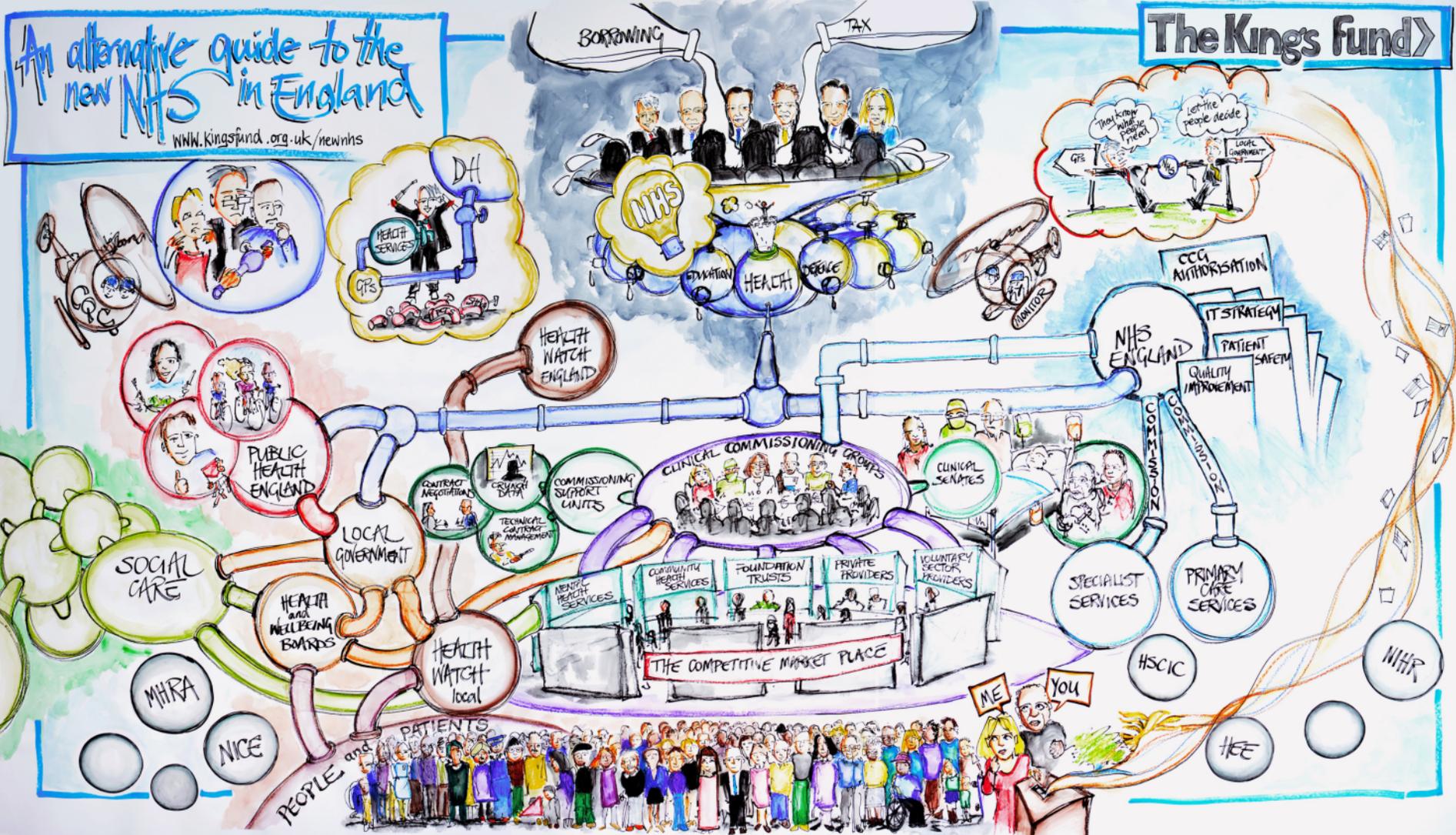


# 2009 - Progress?

## The Innovation Landscape - POCT Market Access



# An alternative guide to the new NHS





# Landscape 2014

Who is the customer?

Depends where you

START ...

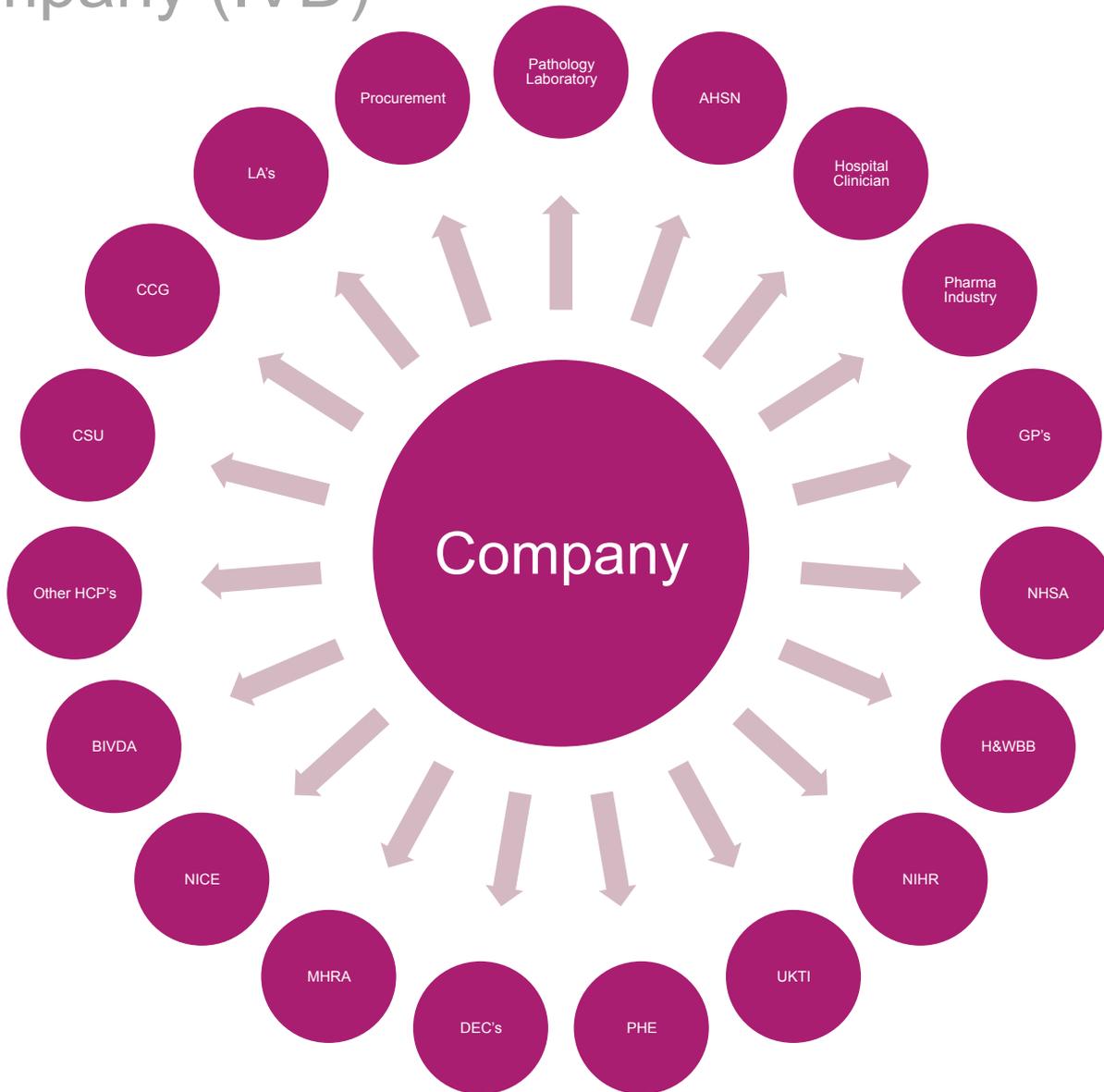


# Citizen (Patient)



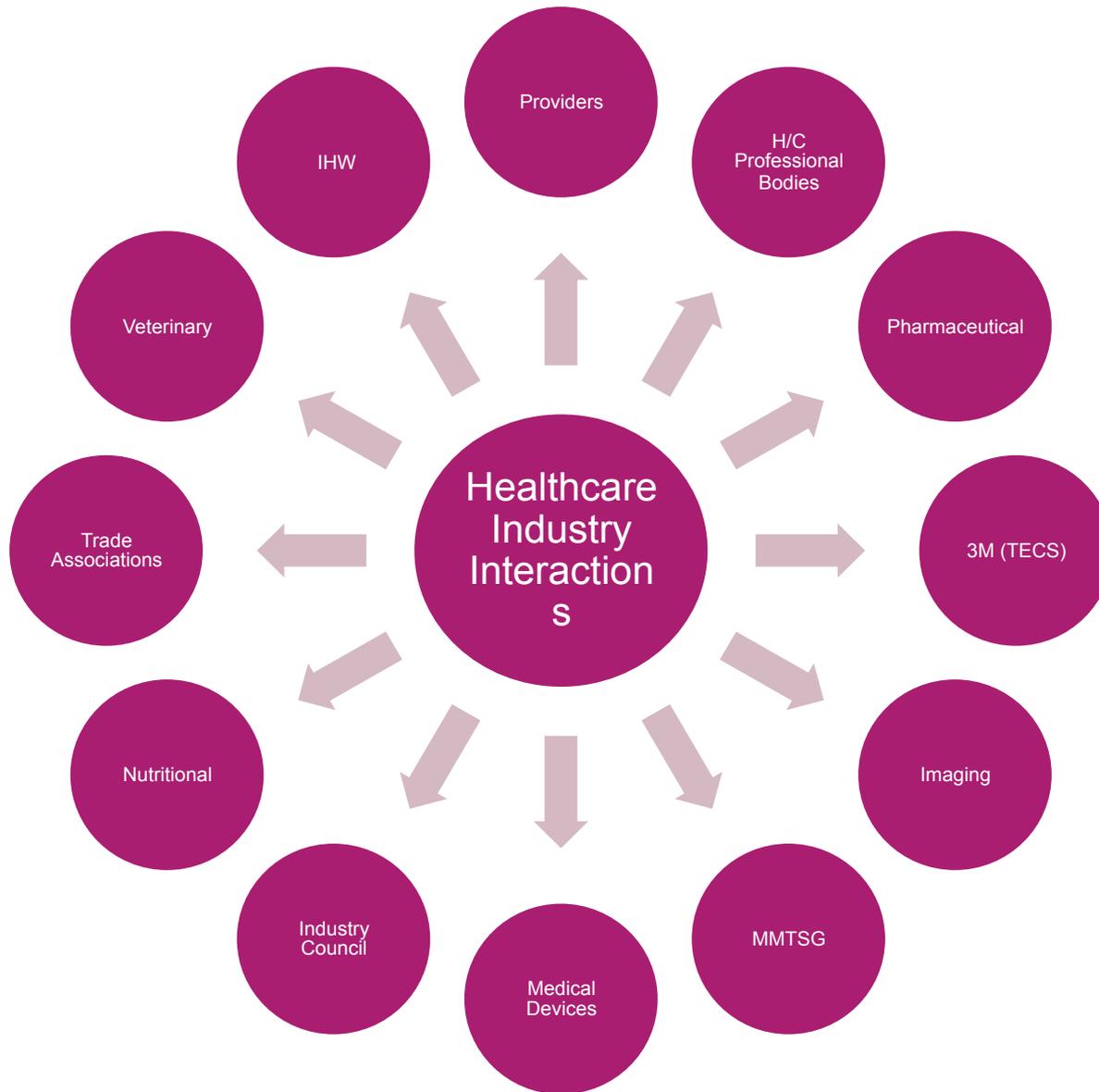


# Company (IVD)





# Healthcare Industry





## 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



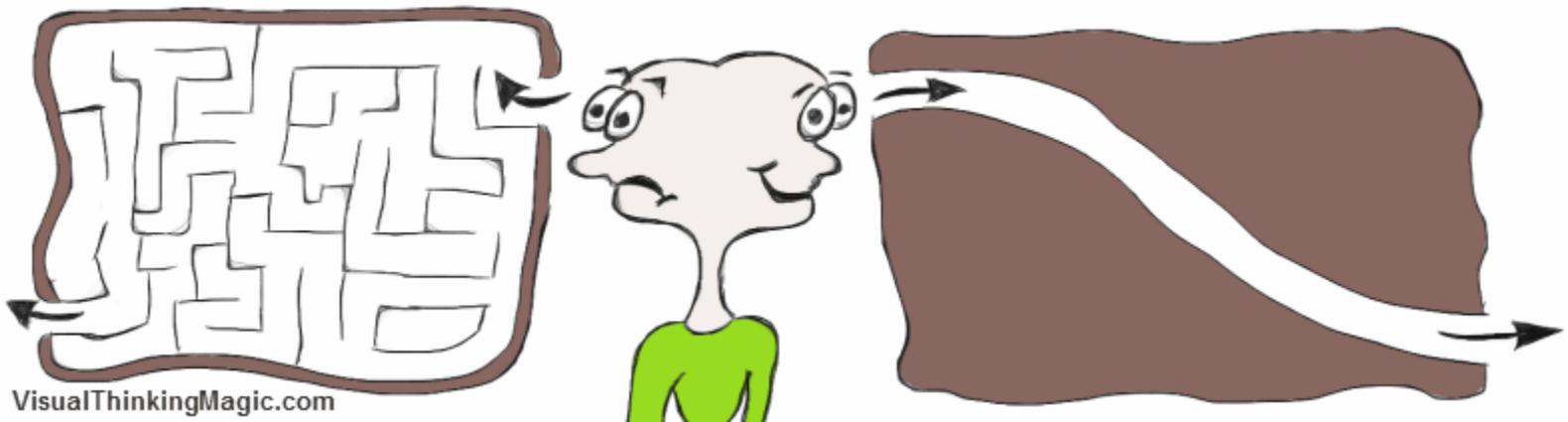
## LE's

- 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.

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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?