

# Healthtech Strategy

2022–2027



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# Foreword



**Tracy Brabin**

Mayor of West Yorkshire



## **Sir Roger Marsh OBE DL,**

Chair of the Leeds City Region  
Enterprise Partnership

## **Foreword**

Healthtech runs deep and wide across West Yorkshire. Our clinical, academic and business innovators have a remarkable track record in developing world-class healthtech that makes a difference to treatment and care – building highly successful businesses in the process.

Years of research document the cluster of strengths we have in healthtech, around both medtech and digital health. We also know there is more we can do in partnership to create the best environment for success for our innovators, and to ensure we are finally recognised fully as a leading player in this field. We have a truly unique opportunity to capitalise on our assets, and one which must be acted upon with pace and determination. I welcome this strategy as the next step towards realising our healthtech ambitions and delivering long-term economic growth across our region.

# Introduction

This strategy aims to capitalise on the exceptional regional Healthtech strengths across West Yorkshire and the Leeds City Region to drive both future economic prosperity and improve health outcomes. Ultimately improving population health and wealth through healthtech innovation.

The Covid-19 crisis has laid bare the need and desire for a step change in tackling entrenched health and economic inequalities. Tackling this with new health innovations – accelerated into the health system – will support both economic (business) growth and the health outcomes of patients.



# Introduction

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West Yorkshire has the raw ingredients to be an engine of health ideas and innovation that can drive levelling up; not just for the region's economy, but for the nation's health. It is able to contribute significantly to the post COVID economic and health recovery.

The West Yorkshire Health and Care Partnership 5 year plan has already identified this critical opportunity. 'Better health and wellbeing for everyone' highlights the transformative opportunities that healthtech and innovation can bring across health provision to deliver a healthier economy.

Our region has a unique healthtech innovation ecosystem with its strengths across medtech, digital and data – and connectivity across and between these strengths – and is leading the way with the translation of research into commercialisation.

The region has been recognised by central government as a high potential opportunity area for woundcare, regenerative tissue, AI and data analytics. However we are not currently seen as the leading Healthtech cluster nationally, due to the fragmented nature of the system and the lack of adoption of products and services into practice. This means our region does not currently reach its full potential for residents and businesses.

There are other well-known health and innovation clusters across the country. However, **none boast the level of assets that we possess in West Yorkshire and Leeds City Region** – assets across industry and academia, plus unique strengths within our public sector infrastructure. The Opportunity section of this strategy focuses on these assets, demonstrating the **prime opportunity** for West Yorkshire and the City Region to become *the leading healthtech cluster* nationally and to partner, where appropriate, with other healthtech clusters across the UK and globally.

**We must act now to capitalise on these strengths**, the market opportunity and to deliver the health and wellbeing outcomes needed post COVID.

In 2019, the global healthtech market was worth an estimated \$175 (US bn), expected to rise to \$660 billion by 2025. Even before COVID, which sharply increased the need for digital health tools to be used, adoption has been steadily increasing.

The healthtech sector faces significant challenges post COVID and the City Region with its dominance of micro businesses and SMEs is no exception. To achieve the full potential of this market, collaboration between the NHS, industry, universities, the third sector and government requires a unified approach. Only through collaboration and connection will we overcome barriers to healthtech innovation, translation and adoption.

Driving excellence in science and innovation will play a key part in addressing the Leeds City Region productivity gap, and the challenges that underpin this.

# Introduction

This strategy provides the framework for that unified approach. It sets out a common language, a shared vision and priorities, and a framework for activity and investment in healthtech, which all partners can work towards.

It is not intended to displace or disrupt all the existing initiatives and programmes underway, but to add value by setting out an agreed roadmap to reach our ambitions.

This is a regional partnership strategy and therefore engagement across partners has been critical throughout the development of this strategy and agreement of the vision and approach.

Our region is not coming to this from a standing start. This strategy builds on the Science and Innovation Audit in 2017, and the subsequent regional healthtech Memorandum of Understanding developed in 2019. This underpinned the region's first cross-sector healthtech partnership, comprising senior representation from the healthtech industry, the health and care system, five universities and the LEP. The MoU functions as a call to action for the range of stakeholders in the region involved in supporting and growing the healthtech ecosystem.

## The Healthtech Cluster

The Region's first cross-sector Healthtech Leadership Group (now titled the Healthtech Cluster), which evolved from the MoU, continues to grow and thrive. Facilitated by Leeds Academic Health Partnership, the Healthtech Cluster involves numerous regional partners, supports shared healthtech programmes, events, promotion and partnerships with other regions, and reduces duplication of work.

This strategy outlines *how* we (the whole partnership/ecosystem) will align our strategic and collaborative approaches. This will begin to reduce fragmentation and bring together the region's universities, health and care system, LEP, Combined Authority and healthtech industry to develop an integrated healthtech innovation system in West Yorkshire.

It will position the region as a locus of healthtech expertise, that will deliver **both high quality patient outcomes, alongside economic and productivity gains**. The strategy sets out high-level ambitions, which will be underpinned by a detailed accompanying 'live' and dynamic action plan owned by the partnership.

# Defining Healthtech

The 2018 Digital Health and Healthtech study agreed definitions of healthtech, medtech and digital health based on a review of existing definitions. A working definition was agreed as:

**Healthtech** the broadest possible definition of new products and/or services relating to the health sector and/or the health and wellbeing of individuals.

Within the umbrella of healthtech are the following:

## Med-tech

A subset of healthtech that involves the design and manufacture of physical products or technologies used primarily in medical settings, encompassing medical devices, and medical equipment as defined by the World Health Organisation.

## Digital health

A subset of health technology that involves the use of electronic or mobile digital technologies via applications, software and / or online platforms.

Put simply, it is about innovation in healthcare **through the improved use and application of technology to better support patient outcomes.**



# West Yorkshire Driving NHS Innovation

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Below are examples of innovations driven nationally by NHS England and the Academic Health Science Network (AHSN) which have been adopted across the region, showing how effective adoption and deployment can be achieved with the right conditions in place.

## Medtech

### Minimally-invasive approach: Urolift

Leeds City Region was one of the early adopting sites of this new innovation (requiring pathway redesign) to convert a three day urology intervention into minimally-invasive day case surgeries. £33k was secured from the Pathway Transformation fund for this innovation to support the pathway re-design.

### Non-invasive approach: GammaCore and SecurAcath

GammaCore and SecurAcath are also in use in the region. These are all examples of innovations endorsed nationally by NHS England and driven into the system by the AHSN, with West Yorkshire and Harrogate being particularly receptive.

## Digital Health

### Transfer of Care Around Medicines (TCAM)

TCAM has been adopted in Leeds City Region for some time now, creating an IT bridge between acute and community care. This ensures patients being transferred out of hospitals into the community have their medication reviewed by a community pharmacist – preventing medicines errors and unplanned re-admissions.



## The Impact of COVID

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The COVID-19 crisis has laid bare the need and desire for a step change in tackling health and economic inequalities. Health outcomes and economic performance are intrinsically linked, and this forms a central part of our wider regional economic recovery plan. There needs to be a focus across the UK in tackling these issues and, within this, West Yorkshire can play a significant role through our unique strengths in health innovation.

We have the raw ingredients to be an engine of health ideas and innovation that can drive levelling up, not just for our region's economy, but the nation; and contribute significantly to the post COVID economic and health recovery.

**This strategy will provide a focus for making these ambitions a reality.**



## The Opportunity

The opportunity for our region is clearly set out in the following reports:

[Science and Innovation Audit \(2017\)](#)

[Digital Health Sector Report \(2019\)](#)

The region has a high concentration of knowledge-based, innovative health sciences organisations, alongside broader healthcare industries. It has recognised strengths and pedigree in digital health innovation and the manufacture of medical and dental instruments.

-  Industrial Strengths
-  Academic Strengths
-  Public Sector Assets

**ECONOMY** **OPEN** **NHS**  
**CORPORATES** **SCALABLE**  
**HOSPITALS** **INFRASTRUCTURE**  
**UNIVERSITIES** **COLLABORATIVE**  
**LEADERS** **HERITAGE** **SME'S**  
**INDUSTRY** **PASSIONATE**  
**CO-LOCATION**

# Workshop findings strengths and assets

In December 2020, a workshop was convened to support the development of this strategy. The following sets out the strengths and assets as previously identified by the group.

## Joined up approach,

### collaboration across sectors

- Co-location
- Aligned strategic intent
- Strong leaders
- Culture of openness
- Willing to partner
- Passion across sectors to become world leading region

### Known areas of excellence across healthtech

- Niche areas/specialisms
- Digital
- Orthopaedics, robotics, surgery & many others...

### Size & scale

- Real world, whole system evidence
- Manageable
- Scalable
- Big but self contained

### History & heritage

- Hospitals
- Industry – corporates, SME's
- Inventions

### Rich in healthtech assets

- Research infrastructure
- Academia/universities
- NHS Industry

“ This is the place where **innovation** happens, where the relationships are established and where attitudes **enable** rather than block.

“ Big enough to matter, small enough to care.

# Industrial strengths

**The region is a nationally regarded leader in med-tech research and development,** and med-tech firms in the region have enjoyed steady growth in recent years. The Office for Life Sciences has published data showing there are substantially more value-adding med-tech firms in the region than in any other UK Local Enterprise Partnership (LEP) area – over 20% more.

**Traditional industry strengths** in the region include implants, surgical instruments, and devices, e.g. DePuy Synthes, Surgical Innovations, Xiros and Brandon Medical.

More recent start-ups and high growth companies are based on emerging technology areas, including biological materials and digital health, e.g. Tissue Regenix, Neotherix and Avacta; TPP and EMIS.

The Yorkshire and the Humber Region, and particularly Leeds City Region, is **one of the foremost UK locations for digital health business.** The combination of a solid digital health business base, and associated leadership and cross-sectoral strengths, mean that the area has a vital role to play in the development of the UK's digital health industry.

Over three-quarters of the region's digital health firms deliver either healthcare provider communication solutions (internally oriented), or data collection, management and interoperability products and services.

Known firm revenues in the healthcare provider and data collection categories amount to just under £500m, with employment of just under 5,000 (almost 90% of total revenues and just over 90% of employment).

These businesses proactively chose Leeds City Region because of the broader strengths of the region set out in this strategy:

- ✓ Data
- ✓ Fintech
- ✓ Environmental tech
- ✓ Agritech
- ✓ Talent and job opportunities
- ✓ NHS Digital, EMIS & TPP
- ✓ YHCR
- ✓ Data-CAN
- ✓ NPIC

**Digital health businesses in particular have seen considerable growth** in the last two financial years (pre pandemic), of which almost half is within data services businesses (£55m), one third are among businesses that deliver healthcare provider products and services, and one fifth are among more client facing products and services.

The two categories of interoperability and healthcare provider solutions include some of the region's most significant businesses, such as:

- Egton Medical Information Systems (EMIS)
- The Phoenix Partnership (TPP).

They clearly represent strengths in the region and **provide a critical advantage because they are also the foundation for advancing other sub-sectors.** The world leading Yorkshire and Humber Care Record for example has interoperability as a core aspect.

The region is home to some of the most innovative patient-facing digital health businesses, including '**Advanced Digital Innovation**', which offers a broad portfolio of patient facing solutions such as:

- 'Mypathway' A secure patient/clinician/service provider digital communication channel
- 'Painsense' A persistent pain self-management application
- 'Medsfinder' A medication self-management application
- 'Stepup' co-produced digital service for supporting young people's mental health
- 'LMSU' A digital platform supporting transition of young people with disabilities from child to adult services

Similarly, the region has several examples of **innovative health system management solutions**, including:

- Smartgate Solutions (now Radar Healthcare) quality and compliance focussed software,
- Lablogic detection and measurement of radioactivity,
- DocAbode clinician resource management software
- RX Systems (now part of EMIS) pharmacy prescription and supply chain management software.

Investment data suggests that these two digital health categories (patient facing solutions and health system management solutions) represent major future growth areas, and have the potential to advance the UK's position as a world-leading digital health economy. (Healthtech and Digital Health report, 2020)

## Academic strengths

Regional universities, and a broad base of wider research and business incubation actors, have played and will continue to play a major role in advancing the region's healthtech sector in areas such as remote patient monitoring, patient engagement, AI, data etc.

West Yorkshire universities have been responsible for securing nationally significant levels of academic and health research funding. They hold the knowledge and expertise required to maintain the region's position nationally, and the UK's position on the international stage. Since 2009, universities within Leeds City Region have attracted c.£675m in academic research funding for innovation from UKRI bodies relevant to the healthtech ecosystem, including:

- Engineering and Physical Sciences Research Council (EPSRC)
- Innovate UK (IUK)
- Medical Research Council (MRC)
- Directly from UKRI

Since 2006, Yorkshire and the Humber has attracted a total of 447 NIHR research projects to the value of £278m, spanning every aspect of NIHR funding. The region has delivered more Health Technology Assessment (HTA) projects; hosted more NIHR fellowships; delivered more Health Service and Delivery Research (HS&DR) projects; and delivered more Public Health Research (PHR) projects than any other region outside London. Per head of population, the region has received the highest proportion of NIHR funding outside of London (£163php compared to the next highest proportion £140php in the West Midlands).

Our region has been recognised by central government as a high potential opportunity area for woundcare and regenerative tissue. Regenerative tissue technologies were pioneered by University of Leeds.

Underpinning everything is the move to digital and remote care. **Leeds City Region is well placed to lead the way here, with significant assets and a long history of academic excellence** in AI, machine learning and data analytics.

We also have **significant strengths in longitudinal data studies** such as Born in Bradford – helping to unravel the reasons for the high level of childhood illness in the UK and bring new scientific discovery to the world – now rolling out to Leeds, Wakefield and Doncaster.



The University of Huddersfield welcomed Tracy Brabin, Mayor of West Yorkshire, to share their vision and plans for the forthcoming National Health Innovation Campus.

November 2021

## Public sector assets

The region is uniquely positioned as home to a cluster of national health organisations. Our public sector assets – hospitals and universities - double up as assets for the private sector; **Leeds City Region is home to no fewer than seven significant government health headquarters**, including NHS England, NHS Digital, Public Health England, NHS Leadership Academy, Health Education England, NIHR Clinical Research Network, and NHSX.

As such it is the decision-making centre for national policy and c.£130bn in funding for NHS commissioning, leadership and digital advancement (via major initiatives such as NHS Spine), as well as education and training of England's health and public health workforce and the protection of public health and wellbeing. There is a significant opportunity around increased collaboration to drive the region's health innovation ambitions.

### West Yorkshire Health and Care Partnership

In May 2021, the West Yorkshire Health and Care Partnership (WYHCP) formally signed a partnership with the Yorkshire and Humber Academic Health Science Network (AHSN) to **deliver a system-wide program for innovation and improvement for its health & care partners**. The Health and Care Bill puts this on a more statutory footing. The new **Innovation and Improvement Hub** formed between the WYHCP and AHSN will

provide strategic direction, leadership and guidance around the innovation agenda.

The Hub will consolidate existing work across key players in the region to better understand and coordinate health care need, and match these to innovative technologies and improvement methodologies.

The partnership works on a subsidiarity model, performing activities at a regional level where most appropriate with area-specific work driven locally. In this way, areas within the partnership will be supported to articulate the needs of the local area and, where needs align, will work via the Hub to achieve economies of scale.

It is the region's ambition for the WYHCP to be the leading ICS on innovation and improvement. **Developing, implementing and adopting innovation, and striving for continuous improvement, leads to improved care;** and to better health and wellbeing, greater service efficiency and improved workforce capability and capacity.

West Yorkshire is ideally placed to realise this ambition, with a vibrant life sciences industry in the footprint and a wealth of expertise and enthusiasm that is not only within the WYHCP but across our partners, including the voluntary and community sector.

The commitment to collaborate across all these assets is a significant strength for the region. Via the Healthtech Cluster and its expansion, there is real commitment and drive to further develop and deepen collaborative relationships - to drive activity as a collective, rather than operating in isolation.



## The Challenge

There is no doubt that West Yorkshire boasts the assets and the opportunity to lead in the healthtech space – particularly in the whole-system approach to discover, develop and deploy.

However, the nature of the system, with the array of organisations and bodies involved has historically at times resulted in fragmentation and lack of coherence.

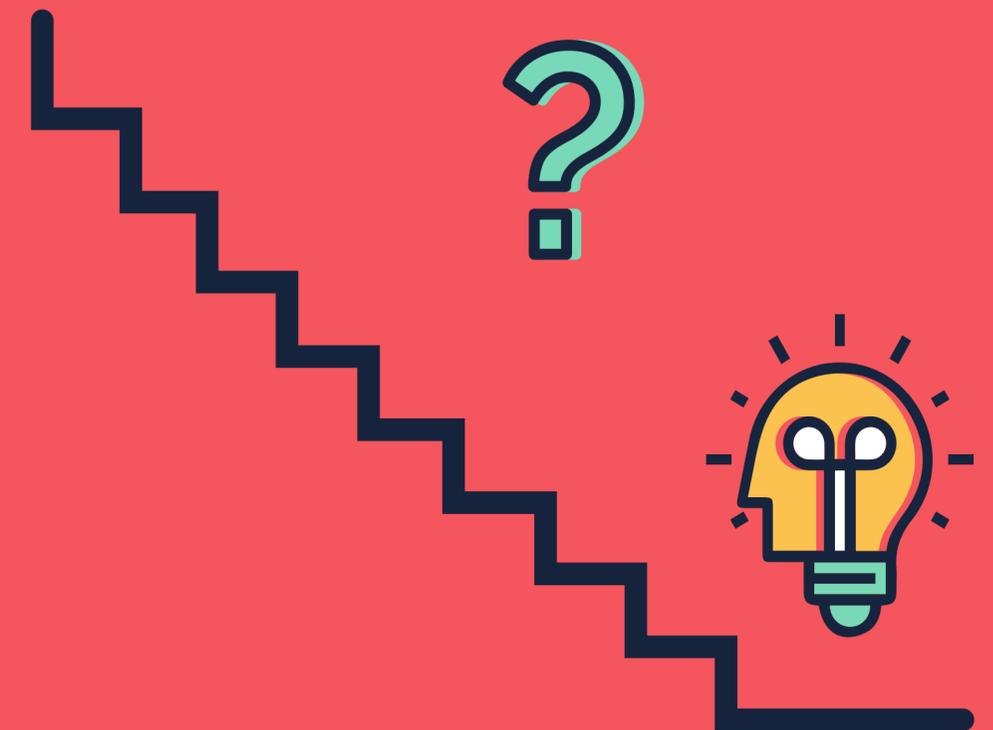
Despite significant health sector leadership and a very strong base of health sector assets in the region, efficiently and effectively navigating the health and care system presents a significant challenge, particularly to start-up and smaller scale businesses (note that this has been identified as both a regional and national issue). This assertion is borne out in the survey data (Digital Health report) collected from regional businesses, in which none of the micro businesses (1-9 employees) identified public procurement as a route to market. As one micro business respondent put it: “selling into the NHS is too hard for start-ups”.

Numerous consultees highlighted the need for an agreed and obvious way of accessing the NHS health system, or a ‘front door’ that would support smaller firms to develop and test new and / or alternative digital health and care solutions.

Consultees also suggested that **finding an effective solution to this challenge was more likely within this region** than in other parts of England because of the well-connected and significant influence of the regional ecosystem. **Regionally, the challenge to date has been in co-ordinating and effectively positioning the region’s assets so that they are widely known among innovators and businesses.**



“ Selling into the NHS is too hard for start-ups



# Healthtech Leadership Group

To begin to tackle this, and building on the recommendations of the Science and Innovation Audit, a Healthtech Leadership Group was established in 2019, bringing together the key stakeholders in the region to reduce fragmentation and maximise the opportunities identified above.

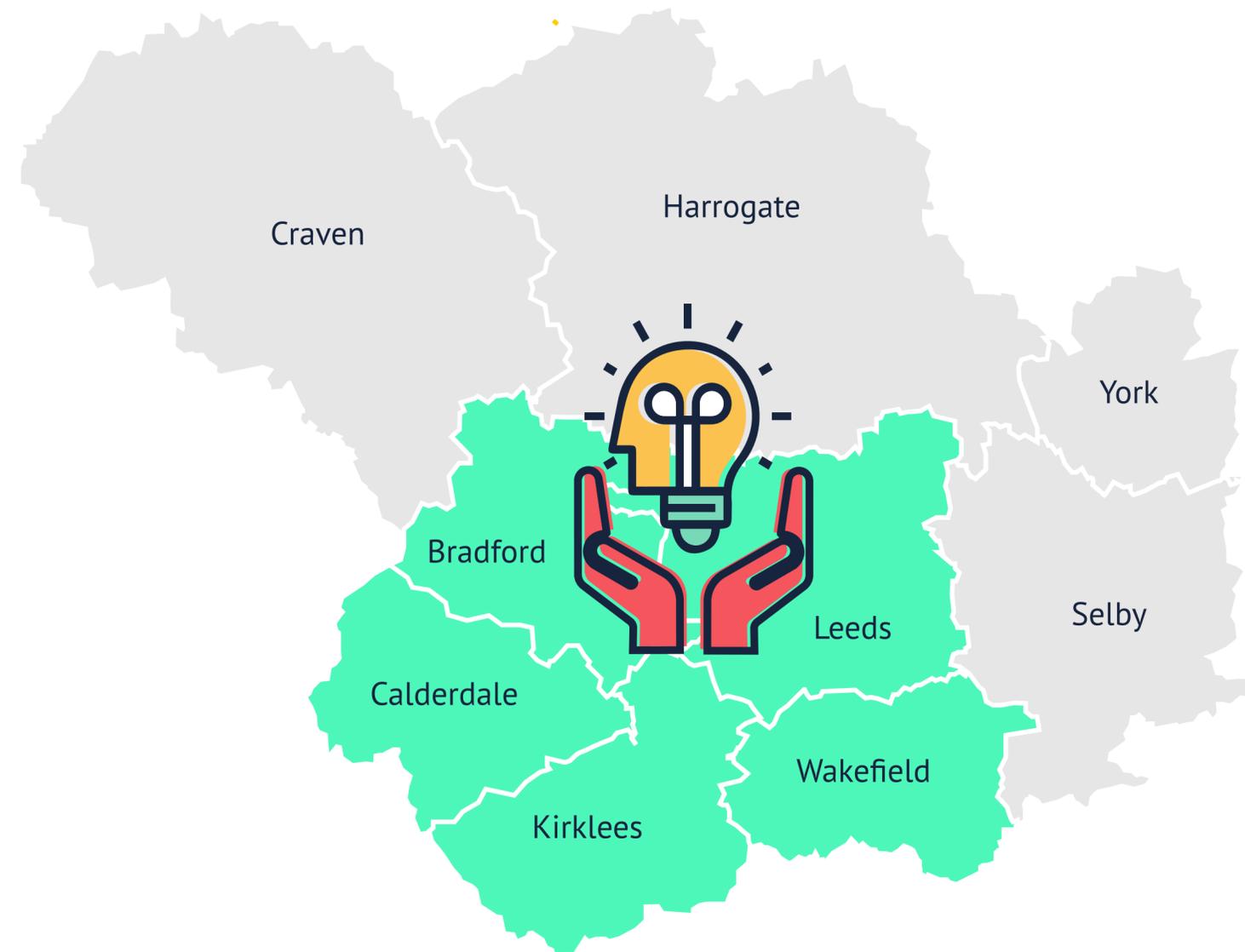
**The group identified the following problem statement:**

*The region has a strong history of innovation in healthtech, however it is not systematic or at scale. There is an opportunity as a partnership to learn from successes and build on these as a region to create spin outs, support existing SME; trade internationally and secure investment – whilst also adopting our home grown innovations.*

*There is also more to be done to create and support a more diverse pool of healthtech innovation-driven enterprises in the region.*

*Misaligned objectives and resources are the major issues preventing the initiation and success of programs, as is a focus on piloting rather than deploying at scale, all hindering potential partnerships.*

*Collectively this means the innovation culture required needs support to strengthen. The ecosystem misses out on opportunities as industry does not always see the region as a magnet for healthtech innovation, regarding other global systems as potentially being easier to navigate.*



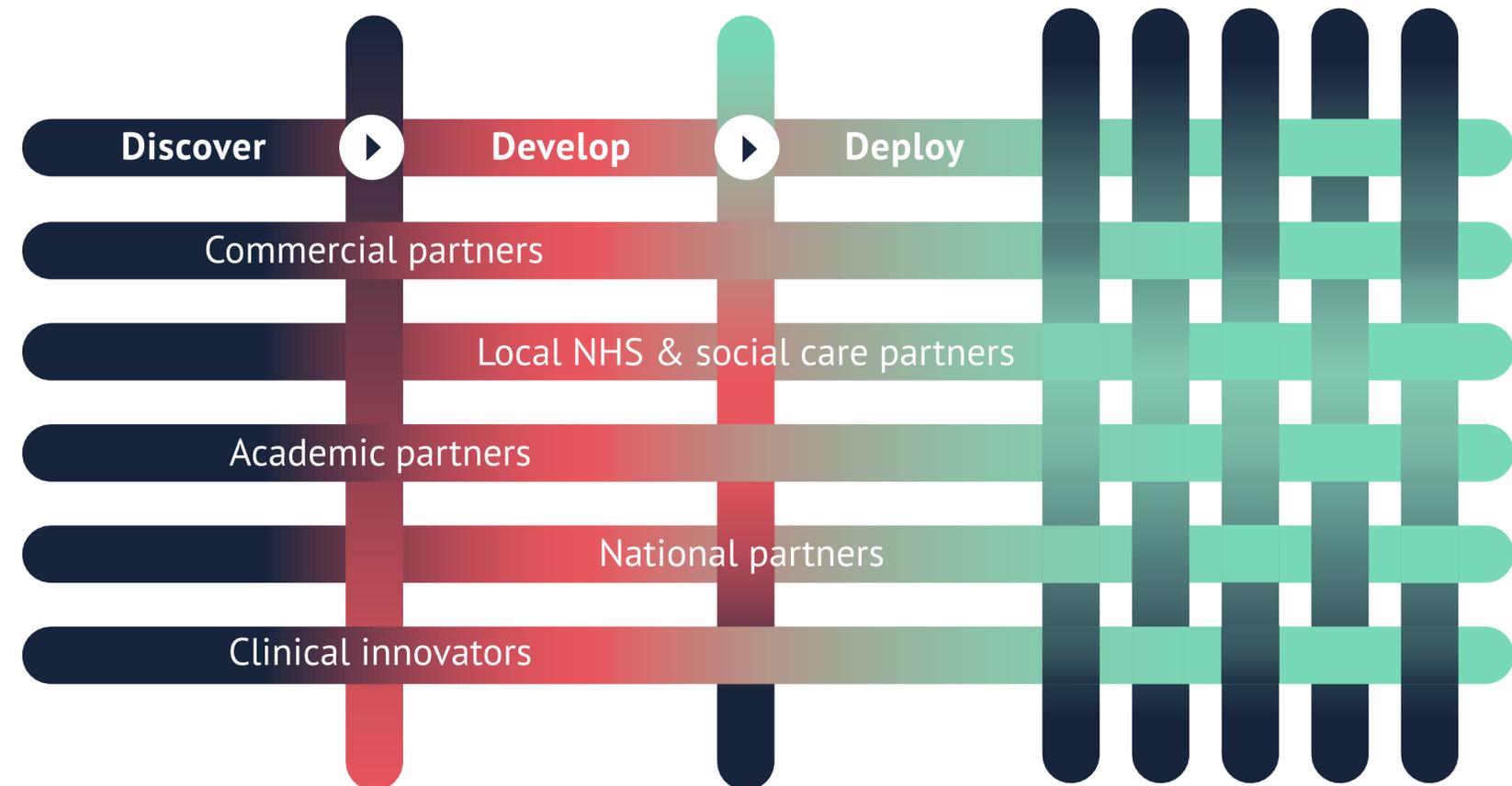
# The Ecosystem

It is important to clearly articulate the range of partners involved in delivering against our regional healthtech ambitions. Each partner has a different role to play in each of the stages and in creating an effective journey through from discovery to deployment.

**Connectivity and the creation of a shared purpose and knowing 'who does what' across our assets is essential.** Good connectivity drives innovators to the right place at the right time – and partners need to have effective referral routes to 'hand on' where appropriate.

Central to this is the new West Yorkshire Innovation Hub. The West Yorkshire Health and Care Partnership, working with the AHSN through the new Hub, will clearly set out the innovation needs and challenges of the health system in the region. In doing so, **the clear articulation of unmet needs will drive discovery and development in the region**, supporting local SMEs and start-ups and attracting inward investment. This clear **system pull** will drive the adoption of innovation and help with strengthening the system wide culture.

The West Yorkshire Health and Care Partnership operates on a principle of subsidiarity where each of the five places in the region will articulate the specific health and care needs of their area. **Organisations such as Leeds Academic Health Partnership will support health and care businesses in this needs-driven approach** and more broadly support the discovery of new and novel ideas across academia and the business base, which may be globally scalable or of global relevance.



A Collaborative Model for the Whole System

## Our HealthTech USP

### Capitalising on the opportunity

**No other country** is as well placed as the UK to foster innovative product development in both medical technology and digital health solutions (Healthtech) at scale, largely because of the potential within the NHS.

**No other region** is as well placed to unlock that potential meaningfully and sustainably because of **the strengths and uniqueness of our cluster of industry assets, university assets and public health assets.**

#### The Leeds City Region offer

Discovery, development, evaluation and adoption of proven innovation that delivers improved health outcomes and reduces inequalities



# Vision for Healthtech in West Yorkshire

We will be the number one place for Healthtech entrepreneurs, innovators and industry.

Our Healthtech ecosystem will be the best-connected and most innovation-driven in the country, providing unrivalled prospects to partner, locate and grow.

We will be the national engine of ideation, development and adoption of proven healthtech innovation. Through connectivity and synergy in our systems, we will drive levelling up – in economic and health terms.

The positive impact of our Healthtech ecosystem will be felt by citizens and communities across the region, the country and the world.



## High Level Priorities

To achieve this vision, our focus needs to be twofold;

### Business Enablement:

We must focus on developing and supporting connectivity across our regional Healthtech cluster to focus on start-ups, SMEs and inward investment opportunities for economic growth.

### Improved Health Outcomes:

Given the assets we have in the region, we must focus on the opportunity for translation and diffusion into the health system across the region (and beyond) to support patient and end user health benefits and reduce health inequalities.

To deliver against these priorities we will commit, as a regional partnership, to driving activity in the following areas. Details will be set out in the linked action plan.



## 14 Point Plan

- 01 We will utilise the new West Yorkshire Health and Care Partnership Innovation and Improvement Hub as the **mechanism to signal the needs of the health system** and drive a cultural shift. The I&I hub will articulate regional NHS system need, support innovative interventions to meet these needs including developing an understanding of existing routes to market, barriers to entry and opportunities to develop evidence of effectiveness to support business grow and secure further investment.
- 02 We will work collaboratively across the partnership (ensuring we have the breadth of representation) to ensure **support conditions are appropriate** across discover, develop and deploy and put in place dedicated resource to facilitate this (Regional Healthtech Lead post and Leadership Group).
- 03 Addressing and **tackling health inequalities** will feature as a central focus and commitment of all health innovation activity in the region across the partnership, with strong alignment to Mayoral priorities for a just and fair recovery.
- 04 In partnership, focus on delivering a cultural shift across organisations to support **adoption at scale**, not limited to those developed in the region.
- 05 The partnership will agree **clear roles across the ecosystem** to ensure the access points for businesses are effective and easy to navigate, and duplication and fragmentation are reduced, working through the I&I Hub.
- 06 The partnership will support the **establishment of the Healthtech Catalyst** to support both health innovation and health outcome objectives, linking in with the West Yorkshire Innovation Network as vertical focused network. The Catalyst will support businesses, innovators, entrepreneurs, healthcare providers and commissioners, and researchers to accelerate economic growth through the development and adoption of healthtech.
- 07 Through the West Yorkshire Innovation Network, we will work collaboratively to **align existing** activity to better meet business requirements in the healthtech space across discovery and development.

Continued on page 23...

## 14 Point Plan

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- 08** Collectively we will ensure that **gaps** in support for businesses and academics are **mapped out and resources identified** to address these, particularly focusing on scaling up interventions with a strong track record of impact.
- 09** To support ideas development we will identify **funding gaps**, particularly venture capital, equity, and explore opportunities to establish an early stage **proof of concept funding pot**.
- 10** We will develop a cohesive **pipeline of projects** across our collaborative partnership to support our vision e.g. ActEARLY, and the National Health Innovation Campus, and explore joint funding opportunities to better support business innovation.
- 11** We will continue efforts to attract the best **inward investment opportunities**, focusing activity around three core sub sectors;
- Woundcare and Regenerative Tissue
  - Diagnostics and Personalised Medicine
  - Digital Health.
- 12** We will put resources into **better articulating impact and opportunity** in the region, by showcasing exemplar activity and developing a suite of case study/demonstrator projects to support further investment. This will raise the national and international profile of the region as a leader in healthtech.
- 13** We will work collaboratively across West and South Yorkshire to develop the concept of a **Healthtech Innovation Corridor**, building on health and innovation strengths across a Yorkshire footprint.
- 14** We will work with related partnerships and organisations to ensure that there is a **focus on the skills** needed to support successful Healthtech innovation, enabling a diverse workforce, and ensuring accessibility and inclusion for citizens.



# Action Plan

The action plan will be a live document and will be used to track and monitor progress. It will be owned and maintained by the Regional Healthtech Lead working with partners within the Healthtech Cluster.

A live version can be found here:

[www.westyorks-ca.gov.uk/healthtech-cluster](http://www.westyorks-ca.gov.uk/healthtech-cluster)



# Indicators

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The below indicators will be owned by the partnership and support bids for future investment.

- Number of new healthtech start ups
- Number and value of regional healthtech inward investment wins
- Number of HT SMEs supported through the various programmes
- Number of new products developed
- Number of new products deployed into the system
- Clinical outcomes, such as improved health through healthtech interventions
- Number of case studies produced and socialised
- Number and impact of regional marketing and comms opportunities realised
- Value of funding bids / investments secured to support regional activity
- Number of jobs created/ safeguarded
- Quantification of health and care service implementations that improve health outcomes over the long term



## Contact us

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