TABLE OF CONTENTS

EXECUT	IVE SUN	MMARY AND HIGHLIGHTS	1	
1.	MARKET			
	1.1	Healthcare	11	
	1.2	Digital health	13	
	1.3	Market size 2020	16	
	1.4	Market definition, spending and segmentation	19	
		1.4.1 England	19	
		1.4.1.1 Digital health in England	21	
		1.4.2 Scotland	24	
		1.4.2.1 Digital health in Scotland	25	
		1.4.3 Wales	25	
		1.4.3.1 Digital Health in Wales	26	
		1.4.4 Northern Ireland	27	
		1.4.4.1 Digital Health in Northern Ireland	28	
	1.5	LaingBuisson Digital Health survey – acute hospitals in England	28	
		1.5.1 Spending split in 2020	28	
		1.5.2 Spending split in 2021	29	
	1.6	New technologies	31	
	1.7	Market forecast	32	
2.	POLITICS AND REGULATION			
	2.1	Politics overview	33	
		2.1.1 Devolved nations	35	
	2.2	Regulation – overview	35	
		2.2.1 Digital health regulation	36	
	2.3	Payment by Results (PbR) (England)	37	
	2.4	Competitive tendering (England)		
	2.5	Integration (England)		
	2.6	National regulators		
		2.6.1 Frameworks	43	
		2.6.2 Information governance	44	
	2.7	Regional regulators		
		2.7.1 England	45	
		2.7.2 Scotland	46	
		2.7.3 Wales	46	

3.

4.

	2.7.4	Northern Ireland	46	
	2.7.5	Other UK-wide regulators	46	
	2.7.6	Professional bodies	47	
	2.7.7	Trade bodies	48	
PAYO	RS		49	
3.1	Overvie	ew	49	
	3.1.1	Proposed National Insurance health and social care levy	49	
3.2	Distrib	ition of funding		
3.3	Comm	ssioners 5		
3.4	Integra	Integration efforts		
3.5	Digital	support for commissioning	56	
MAJO	R PROVI	DERS	59	
4.1	Overvie	ew	59	
4.2	Provide	ers in the UK nations	60	
	4.2.1	England	60	
		4.2.1.1 Overview	60	
		4.2.1.2 Complexity	63	
		4.2.1.3 Main market landscapes	63	
	4.2.2	Scotland	64	
	4.2.3	Wales	65	
	4.2.4	Northern Ireland	65	
4.3	Market	t structure	66	
	4.3.1	Acute hospital PAS/EPR systems	66	
	4.3.2	Mental health and community PAS/EPR systems	70	
	4.3.3	Primary care practice management systems	74	
		4.3.3.1 Scotland	74	
		4.3.3.2 Wales	74	
		4.3.3.3 Northern Ireland	74	
		4.3.3.4 England	74	
	4.3.4	Other markets overview	81	
		4.3.4.1 Care markets	83	
		4.3.4.2 Interoperability services	84	
		4.3.4.3 Social prescribing	85	
		4.3.4.4 Pharmacy stock control and Electronic Prescribing and Medicines Administration (ePMA)	86	
		4.3.4.5 Clinical portals	89	

			4.3.4.6 Patient facing services	92
			4.3.4.7 Children's services	95
			4.3.4.8 Radiology Information Systems (RIS) and Picture Archiving and Communications Systems (PACS)	96
			4.3.4.9 Pathology systems	98
5.	INVES	TORS		101
	5.1	Opport	unities in the UK	101
	5.2	Historic	al investments in UK healthcare	102
	5.3	Digital i	investment opportunities	104
		5.3.1	First generation technologies	107
		5.3.2	Second generation technologies	108
		5.3.3	Third generation technologies	109
6.	MARKET POTENTIAL			115
	6.1	A perio	d of acquisition	115
		6.1.1	Oracle – Cerner	115
		6.1.2	Optum – EMIS Health	116
		6.1.3	Access Group – Servelec	117
		6.1.4	Dedalus – DXC	117
		6.1.5	System C - Wellsky	118
		6.1.6	Other, smaller scale, deals	118
	6.2	Digital	systems – coming of age, though not on a universal basis	119
	6.3	Investo	rs are coming of age	121
	6.4	Establis	shed technologies – second generation	122
	6.5	New tee	chnologies – third generation	123
		6.5.1	AI – artificial intelligence	124
		6.5.2	IA – intelligent automation	125
		6.5.3	Blockchain	126
		6.5.4	Digital health apps	127
		6.5.5	At home monitoring	129
		6.5.6	Telehealth	131
		6.5.7	Drone technology	131
APPEND	91X 1. GL	OSSAR	(133
APPENDIX 2. REGULATORS			RS	137
APPENDIX 3. TRADE BODIES AND ASSOCIATIONS			DIES AND ASSOCIATIONS	139

APPENDIX 4. NHS SPECIFIC NETWORKS AND ORGANISATIONS	143
APPENDIX 5. DIGITAL HEALTH – THE THIRD GENERATION OF HEALTH TECHNOLOGY	145

LIST OF TABLES

Table ES1	Covid-19 cases and deaths, to August 2022	1
Table 1.1	Total health expenditure, £bn, UK, 2021	11
Table 1.2	Total social care expenditure, £bn, UK, 2021	12
Table 1.3	Digital health market size, £m, 2020/21-2021/22	17
Table 1.4	NHS budget and segmentation, England, 2022/23	19
Table 1.5	NHS budget and segmentation, Scotland, 2022/23	25
Table 1.6	NHS budget and segmentation, Wales, 2022/23	26
Table 1.7	HSCNI budget and segmentation, Northern Ireland, 2022/23	27
Table 2.1	NHS core allocations to Integrated Care Board, 2022/23	39
Table 2.2	Ten key frameworks	44
Table 3.1	NHS England and Improvement budget, £bn, 2022/23-2024/25	50
Table 4.1	Total GP appointments, May 2019 and May 2022, England	93
Table 6.1	Digital health market recent acquisitions, December 2022–June 2022	115
Table 6.2	First time internet usage during the Covid-19 pandemic	120















Print - Online - Digital - Mobile







Healthcare Markets UK is the leading journal covering the UK independent healthcare sector. Drawing upon LaingBuisson's unique data, the title combines high-quality journalism with in-depth analysis and contributions from key industry associations and sector experts. Digital and print subscriptions include access to an online archive dating back to 1998.

For further information on these titles visit laingbuissonnews.com where you can sign up for a trial, or contact our account managers on sales@laingbuisson.com or +44 (0)20 7841 0045

Independent. Intelligent. Insightful.

Ten print editions - delivered through the year **News insight** - taking stories beyond the headlines In depth features - written by authors with a deep understanding of the markets

Interviews - with leading healthcare figures

Unique data tables - presenting LaingBuisson figures on market sizes

Special supplements - including roundtable reports, cost surveys, infographic posters

Online archive - news and features dating back well over a decade

News e-alerts - delivered to your inbox

Additional subscriber benefits

Early registration window for LaingBuisson conferences and seminars, with fixed 'early bird' rate 5% discount on all additional LaingBuisson product or event purchases made throughout your subscription

Subscribe now

Subscribe to a single printed hard copy title for just £499 a year, or upgrade to receive print and digital copies for £749^{*}, or take out a subscription to both Healthcare Markets and Care Markets and pay just £749 for print and £999^{*} for the digital package.

Company-wide subscription packages also available including multiple print copies and online subscription accounts - call to discuss prices.

SUBSCRIBE NOW

***** +44 (0)20 7841 0045

⊠ sales@laingbuisson.com

Iaingbuissonnews.com

LIST OF FIGURES

Figure ES1	Covid-19 vaccination rates, August 2022	2
Figure 1.1	Digital heath vendor landscape, 2022	14
Figure 1.2	The NHS digital health market, 2021	17
Figure 1.3	The place board model – Joining up care for people, places and populations,	
	February 2022	20
Figure 1.4	United Tech Fund, available funding, £m, 2021	24
Figure 1.5	Revenue spending by IT category	29
Figure 1.6	IT spending as a percentage of turnover, percentage of trusts, 2021/22	30
Figure 1.7	Capital spending as a percentage of trust spending, percentage of trusts, 2021/22	31
Figure 1.8	Digital health market value, UK, 2016-2024e	32
Figure 2.1	NHS waiting list, UK, September 2008–June 2021	34
Figure 2.2	Department of Health and Social Care spending, UK, 2007/8–2024/25	34
Figure 2.3	Proportion of NHS trusts in financial deficit, UK, 2009/10-2019/20	36
Figure 4.1	PAS supplier market share by instance, England, 2022	67
Figure 4.2	EPR supplier market share, England, 2022	69
Figure 4.3	EPR supplier market share, UK, 2022	69
Figure 4.4	Mental Health EPR market share by instance, England, 2022	71
Figure 4.5	Community EPR market share by instance, England, 2022	71
Figure 4.6	Mental health and community supplier market share by instance, Scotland, 2022	72
Figure 4.7	Mental health and community supplier market share by instance,	
	Northern Ireland, 2022	74
Figure 4.8	GP systems supplier market share by instance, England, 2022	78
Figure 4.9	GP systems supplier market share by instance, Scotland, 2022	78
Figure 4.10	GP systems supplier market share by instance, Wales, 2022	79
Figure 4.11	GP systems supplier market share by instance, Northern Ireland, 2022	80
Figure 4.12	GP systems supplier market share, UK, 2022	81
Figure 4.13	Pharmacy stock control supplier market share by instance, England, 2022	87
Figure 4.14	ePMA acute supplier market share by instance, England, 2022	89
Figure 4.15	General practitioners FTE, 2016–2022, England	94
Figure 4.16	RIS market share by installed base, %, UK, 2020	96
Figure 4.17	PACS market share by installed base, %, UK, 2020	97
Figure 4.18	LIMS market share by installed base, %, UK, 2020	98
Figure 6.1	Top ten EHR vendors by number of inpatient hospitals, global	123



Do you want to understand the global healthcare market?



Healthcare Markets *international*, the latest journal from business intelligence provider LaingBuisson, delivers comprehensive, reliable and independent reporting on the full range of acute and primary healthcare services markets operating around the world. This digital journal covers medical and surgical hospitals and clinics, psychiatric hospitals, fertility, dentistry, primary healthcare and temporary/flexible staffing. Embracing the latest business activities across the healthcare sector, HMi delivers interviews with leading names in the sector, in-depth features and business news coverage, providing invaluable insight and analysis.

SUBSCRIBE NOW

An annual digital subscription is just \pm 749 and provides you with online access to the latest market intelligence, ten PDF issues and a subscription to the International Medical Travel Journal.

*****+44 (0)20 7841 0045

- 🖂 sales@laingbuisson.com
- 🕆 laingbuissonnews.com

To find out more visit www.laingbuissonnews.com

REQUEST YOUR FREE TRIAL TODAY