

Q1 2025 Health Policy Update



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DHSC

Department of Health and Social Care



NHS Reform & the Future of the Health Service

[Wes Streeting MP at the University of East London, 25 March 2026](#)

"The NHS is in a better state today than I found it, and I'm just getting started."

-374k

Waiting list
reduction since
2024

77%

Patient satisfaction
with GP access
(up from ~60%)
[Source](#)

2.7%

Productivity growth
achieved
(target was 2%)

£26bn

Additional NHS
investment
this Parliament

- ✓ Best 4-hour A&E waits in 4 years; best ambulance response for heart attack/stroke in 5 years
- ✓ 2,000 additional GPs delivered (promise was 1,000); highest number of GPs on record
- ✓ 1.8m extra NHS dentistry appointments in H1 (promise was 700,000)
- ✓ 900,000+ more children with NHS-funded mental health support teams in schools

Intensive Recovery Programme

- High-performing trusts masking chronic underperformance
- Targets worst-performing providers nationally
- Deploying top leaders into struggling trusts
- Structural interventions incl. breaking up trusts
- “No more turning a blind eye to failure”

Major GP Contract Reform

- Significant GP contract overhaul confirmed imminent
- Primary care as leaders of neighbourhood health
- Supports hospital-to-community shift
- Aligns with 10 Year Health Plan
- Builds on highest GP numbers on record

Integrated Health Organisations

- “Most radical reform in the history of the NHS”
- First wave holding full health budget for a population
- Responsible for all health services within it
- Addresses lack of incentive for prevention
- Devolution deals: Gtr Manchester & South Yorks

“AI will transform healthcare more than any other sector or industry”

NHS App & AI

- NHS App: more registered users in England than Netflix
- 330m messages sent via App last year, double previous year
- Vision: transform the App into a “doctor in your pocket”
- AI to speed diagnostics, imaging, free clinicians from paperwork
- “Big leaps” on tech for patient care & efficiency coming shortly

Patient Empowerment

- New “Patient Power Payments” to be trialled over next year
- Patients decide whether provider deserves full payment
- From April: patients choose whether/when to attend follow-ups
- Easier choice and booking of appointments rolling out
- Goal: same ease and convenience as other aspects of daily life

0%

Tariffs on UK pharma exports to the US for 3+ years

25%

Increase in NICE cost-effectiveness threshold

14.5%

2026 VPAG rebate for newer medicines (down from 22.9%)

- ✓ UK is the first country globally to secure 0% tariffs on pharmaceutical exports to the US
- ✓ NICE QALY threshold increased to £25k–£35k (from £20k–£30k), first rise in 20+ years
- ✓ Government commits to doubling innovative medicines spend as % of GDP (0.3% to 0.6%) over 10 years
- ✓ Preferential terms for medtech exports with no additional new tariffs for at least 3 years

BB

This commitment by the MHRA and FDA to deepen regulatory cooperation is an important step forward for patients and for the UK's health sector. Greater alignment between trusted regulators will give innovators clearer, more predictable pathways and help ensure that safe, cutting edge technologies reach patients more quickly.

techUK has long called for smarter, internationally connected regulation, and this announcement shows real momentum toward reducing duplication while maintaining the highest standards of safety and effectiveness. Closer cooperation will be especially valuable for UK innovators and SMEs, helping them navigate regulatory requirements more effectively and bring breakthrough products to market faster.

We look forward to working with both regulators, industry, and the wider health system to help realise the benefits of this approach and strengthen the UK's position as a global leader in medical technology.

DD

Julian David – Chief Executive, techUK

NHS England SME Playbook

- Practical guide for SMEs navigating NHS procurement
- Covers compliance, evidence generation, market segmentation
- Aligns with Procurement Act 2023 (1 April 2026)
- Aligns with techUK's SME Evidence Pack

Pandemic Preparedness Strategy

- £1bn investment in health protection during spending review
- All Pandemic Hazards Bill to be drafted
- UKHSA new mass testing & contact tracing services

565k+

Women waiting
for gynaecological
care

9yrs 4mo

Average diagnosis
time for
endometriosis

-30k

Gynae waiting list
reduction
since June 2024

Flagship Reforms

- ✓ Patient Power Payments trial: women can decide if provider funding is withheld
- ✓ Single referral point to streamline gynae care and cut waits
- ✓ New pain relief standards for hysteroscopies, coil fittings and invasive procedures
- ✓ Redesigned clinical pathways for heavy periods, urogynaecology and menopause
- ✓ NHS Online, gynaecology confirmed as first specialty

New Investments & Programmes

- ✓ £1m menstrual education programme for schools
- ✓ £1.5m Femtech Challenge Fund to accelerate innovation
- ✓ Women's Voices Partnership to inform future policy
- ✓ Specialist regional centres for group-based care
- ✓ NHS Health Check: menopause question added (up to 5m women)



Office for Life Sciences

Life Sciences Competitiveness Indicators 2026

4th

Globally for
Govt health R&D
budget (% GDP)

0.32%

GDP from pharma
business R&D
(3rd highest)

2.7%

Global share of
commercial trial
recruitment

10.8%

Share of global
medical sciences
citations (3rd)

Key context: Updated comparator methodology aligns with the LSSP target for the UK to lead European commercial R&D by 2030. Share has gradually declined from 13.6% in 2017.



NHS England

Digital Transformation & Operational Priorities

Outpatient Reset

Full reset of outpatient care, expand Advice & Guidance, reduce unnecessary follow-ups

Tech-Enabled Productivity

National rollout: AVT, theatre utilisation tools, RTT validation, e-prescribing

NHS App Expansion

95% of appointments available via App (after triage) across all care settings

Federated Data Platform

All acute, community & mental health providers onboarded to FDP

Proactive Neighbourhood Care

Reduce hospital bed days for highest-risk cohorts through community models

Urgent Care Booking

Easier appointment booking to reduce avoidable emergency attendances

Launch confirmed for 2027, projected to deliver 8.5m virtual appointments in first 3 years

Ophthalmic

General medicine

Women's health

How it works: GP referral → triage via NHS App → specialist video consultations anywhere in England → remote monitoring. Tests/scans at local sites. Face-to-face always available.

19

Suppliers listed
on initial registry

+23.5%

Increase in direct
patient interaction

-8.2%

Reduction in overall
appointment length

+13.4%

More patients seen
per A&E shift

Supplier Registry (Jan 2026)

- Self-certified registry: MHRA Class 1 + DTAC assessment
- Applications reopened 3 Feb 2026, open indefinitely
- Not a commercial framework, procurement by individual NHS bodies

Guidance (Updated Q1 2026)

- Developed with National Data Guardian
- Explicit consent not required for individual care, but transparency essential
- Clinicians retain full responsibility for record accuracy



Devolved Nations

NHS Wales & Scotland

NHS Wales Planning Framework 2026–2029

Published 13 March 2026

- Three-year strategic framework with six priorities
- Digital and data mandated as key enablers
- Prevention, self-management & care closer to home
- Quality and Safety confirmed as strategic priority
- Aligned with Community by Design Programme

Devolved Nations Elections & Pre-Election Period

Polling Day: 7 May 2026

Scottish Parliament, Welsh Senedd, and England's Local & Mayoral Elections.

Impact for industry:

- No new policy initiatives, procurement launches or strategic announcements from devolved governments during the period
- Ministers remain in post but must exercise discretion; civil service impartiality strictly enforced



Regulators

MHRA Consultations & MHRA-NICE Pathway

AI Regulation in Healthcare

National Commission publishes recommendations Summer 2026. Focused on adequacy of rules, accountability for AI decisions, adapting oversight for evolving systems.

Indefinite CE Mark Recognition

Proposes indefinite recognition of EU MDR/IVDR CE-marked devices in GB. ~90% of devices are CE-marked. UKCA repositioned for innovative/AI products.

MHRA–NICE Aligned Pathway

Synchronises licensing and value assessment. Patients receive new medicines 3–6 months sooner. 27 early-adopter companies signed up; first guidance expected June 2026. New Integrated Scientific Advice service provides single-entry point for coordinated MHRA/NICE guidance early in development.

Closing remarks!

22

workshops, roundtables, briefings & consultation responses

direct dialogue with senior public sector leaders



Workshops

Co-production with senior leaders

- NHSE TSAS: Technology Blueprint session with Sonia Patel
- Digital public infrastructure readiness workshop
- Digital Care Hub process mapping social care
- 4 Single Patient Record roundtables



Consultation Responses

Coordinated policy advocacy

- MHRA Call for Evidence on AI Regulation submitted
- AI & Digital Technology in Children's Social Care
- Meetings with Prof Alastair Denniston (MHRA Commission)
- HoL Personalised Medicine & AI inquiry



Roundtables

Senior-level frontline discussions

- NHSE Connectivity: resilience in community settings
- 1:1 meetings with NHS connectivity leads
- OLS roundtable on Life Sciences Sector Plan delivery
- Health wearables, data standards & NHS integration



Industry Briefings

Early, practical intelligence

- Single Patient Record industry briefing
- MHRA webinar on SaMD regulatory journey
- DTAC Reform with DHSC/NHSE Joint Policy Unit
- NHS LPP procurement + NHSE Cyber Resilience

OPEN

AI & Digital Technology in Children's Social Care

techUK response to DfE Call for Evidence

Gathering industry input on current use cases, barriers to adoption and ethical considerations. Member input session held 14 April 2026, written contributions still welcome. Deadline: 1st May.

Contact Lewis Stewart to contribute to techUK's submission

DEADLINE 20 APR

Personalised Medicine & AI Inquiry

House of Lords Science & Technology Committee

Chaired by Lord Mair CBE. Uses personalised medicine and AI as case studies to examine NHS innovation adoption barriers (e.g. procurement, regulation, commissioning, infrastructure).

Contact Viola Pastorino to contribute to techUK's submission

Upcoming Health & Social Care Events

[Event Directory Link](#)

22 Apr

Public Sector SME Partnering & Networking

30 Apr

Leeds Health & Social Care Industry Dinner

11 May

Attitudes to technology and AI in health care

14 May

NHS Urgent and Emergency Care (Pre Market Engagement)

15 June

Scotland's Digital Health Priorities with Jonathan Cameron

23 June

CareTech Conference

Thank you

