

Q2 2025 Health Policy Update

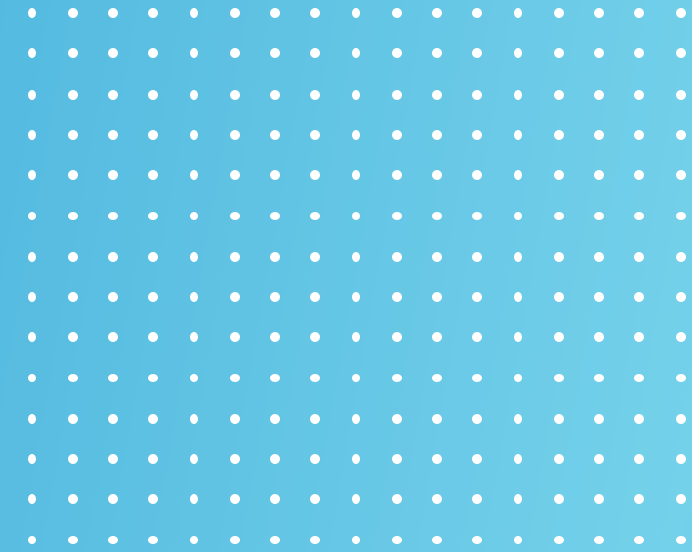
Positioning for opportunity amid rapid reform



Introduction

Agenda

1. Government-wide initiatives
2. Department of Health & Social Care (DHSC) highlights
3. NHS structural & digital shifts
4. Devolved-nation priorities
5. Legislation in flight
6. Regulatory landscape (MHRA & NICE)
7. Implications & next steps



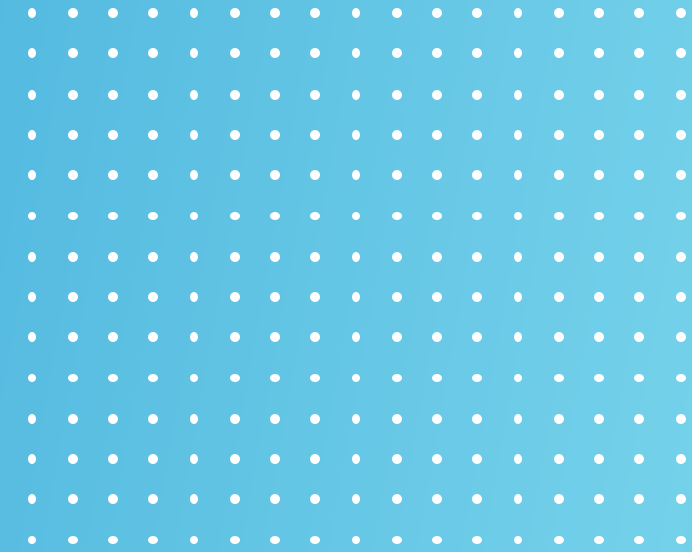
Government-wide initiatives

Industrial Strategy (Life Sciences)

- Life sciences named one of eight growth engines
- Vision: UK #1 in Europe by 2030; global #3 by 2035
- £650 m Genomics England | up to £354 m Our Future Health | £520 m Innovative Manufacturing Fund
- Emphasis on R&D-friendly regulation and advanced manufacturing hubs

Spending Review 2025

- £2 tn total public spend; departments +2.3% pa
- Record £29 bn uplift for NHS (+3% pa)
- 2025/26 health budget £277 bn – second only to social protection



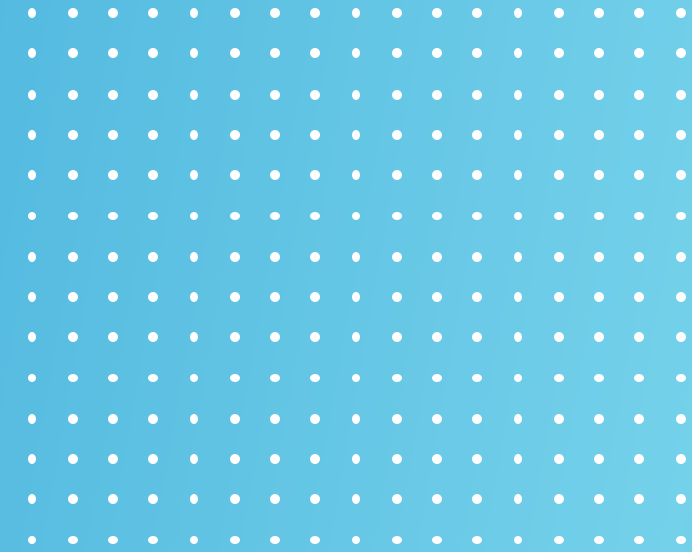
Strategic Supplier Relationship Management (SSRM)

- Joint DHSC/NHSE/Cabinet Office programme launched May
- 15 critical suppliers; 4 Health Crown Reps appointed

10-Year Health Plan

- Hospital → community care
- Analogue → digital systems
- Treating sickness → preventing illness

Early focus on working-class & coastal communities; faster clinical-trial access



10 Year Health Plan

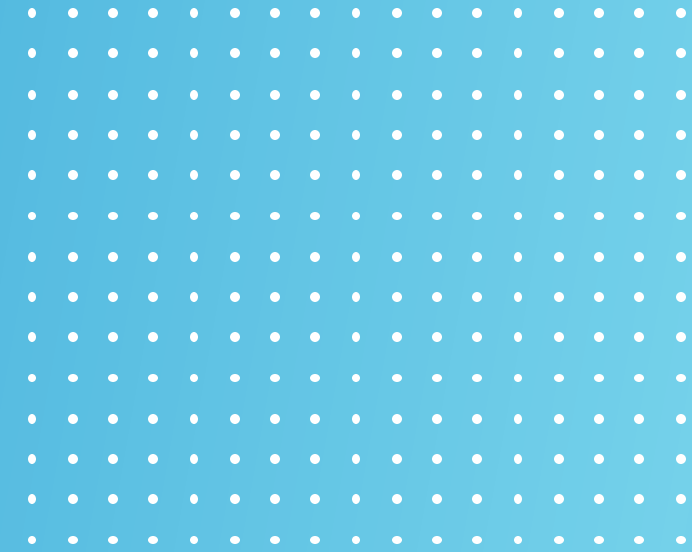
Shift	Headline	Key Moves & Milestones (select)
Hospital → Community	Neighbourhood Health Service	<ul style="list-style-type: none">• Every community gets a 12-hr/6-day Neighbourhood Health Centre (NHC).• Same-day GP appointments via app.• 95 % of complex-needs patients on a co-created care plan (2027).• £120 m for mental-health.
Analogue → Digital	“Doctor-in-your-pocket”	<ul style="list-style-type: none">• Single patient record & single staff sign-on.• NHS App the full “front door” by 2028: self-referral, booking, meds, feedback.• AI scribes cut admin time.
Sickness → Prevention	Power to choose health	<ul style="list-style-type: none">• Tobacco & Vapes Bill: smoke-free generation.• “Moonshot” to end obesity: junk-food ad bans, sugar-levy 2.0, weight-loss drugs at scale.• New health-rewards scheme, healthy-food reporting law.

NHS Merger Structure

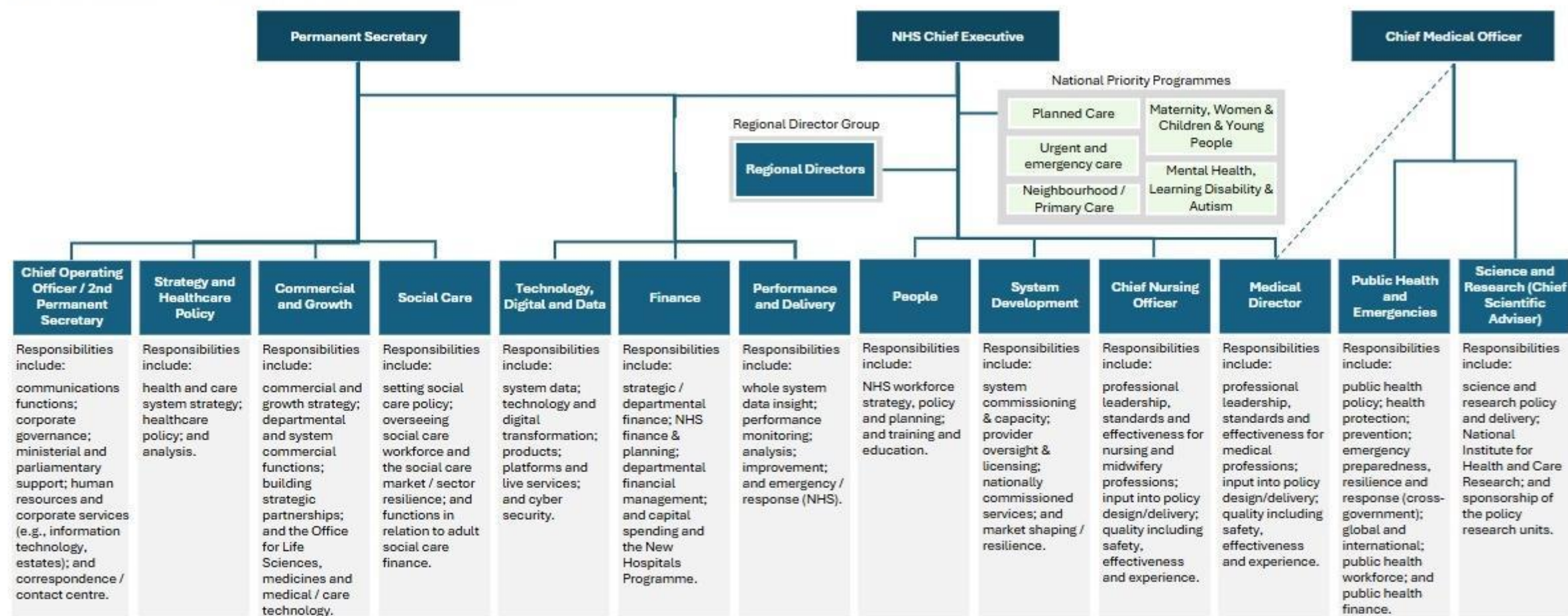
Integrated DHSC-NHSE Leadership

- The new organisational framework includes:
- 13 Director Generals at the senior leadership level
- 5 'National Priority Programme' leads with director general status
- 7 Regional Directors who will also hold director general status

This creates a total of 25 senior leadership positions with director general status across the integrated organisation.



Proposed future DHSC senior structure



Regional Teams:

Responsibilities include: providing leadership and capability to support local health and care system delivery; and supporting systems in managing specific local issues.

Notes

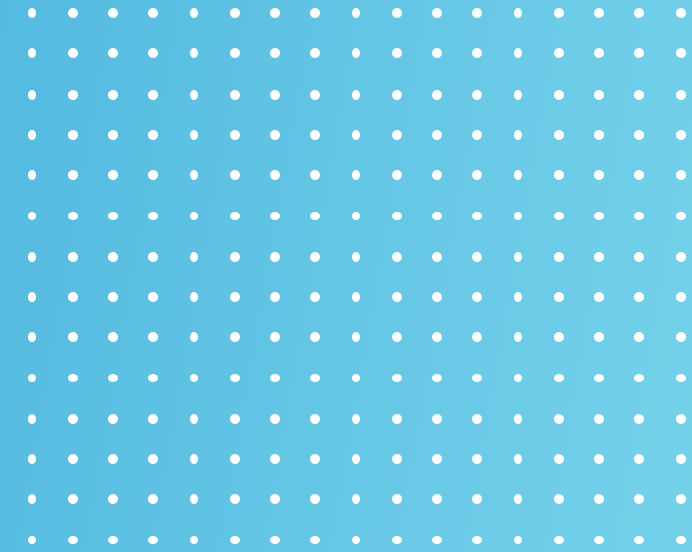
- Details of where functions and teams sit – including between national, regional and outside of the centre – will be confirmed over the coming months.
- All those in the Executive will have 'dotted lines' to the Permanent Secretary, NHS Chief Executive and the Chief Medical Officer.
- Accountable for their individual programmes, the National Priority Programme Leads will work with and through Director General groups to ensure delivery is coordinated across the organisation. Neighbourhood / Primary Care lead will dually report to the Permanent Secretary & NHS Chief Executive.
- Further detail of how quality will be shared between Chief Nursing Officer and Medical Director to be confirmed.
- Additional clinical / professional leadership roles will be determined as part of detailed design work.

NHS App Roadmap

- Enhancements across records, bookings, prescriptions, comms & analytics
- Target: 70 % of elective appointments bookable via app

Single Patient Record (SPR)

- Market consultation open; draft minimum functions published (May)
- Vision: longitudinal record spanning all care settings



Devolved-Nation Priorities

Scotland | [Population Health Framework 2025-35](#)

Five prevention drivers:

- 1 Prevention-focused system
- 2 Social & economic factors
- 3 Places & communities
- 4 Enabling healthy living
- 5 Equitable access

Wales | [Health & Social Care Act 2025](#)

Ends private profit in looked-after-children's care; embeds corporate-parenting duty; enables National Care Service roadmap

Northern Ireland | [PHA Corporate Plan 2025-30](#)

Four pillars: pandemic preparedness; systematic inequality reduction; ageing well; mental-health improvement (WHO age-friendly roll-out)

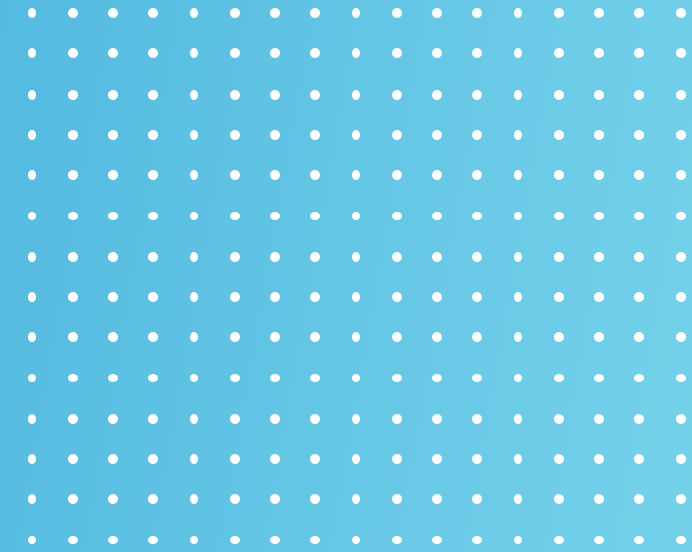
Key Bills & Acts

Data Use & Access Act 2025

- Royal Assent 19 Jun; modernises data-sharing, privacy, innovation access

Mental Health Bill 2025

- 2nd reading 19 May; updates 1983 Act (choice, parity, detention safeguards)

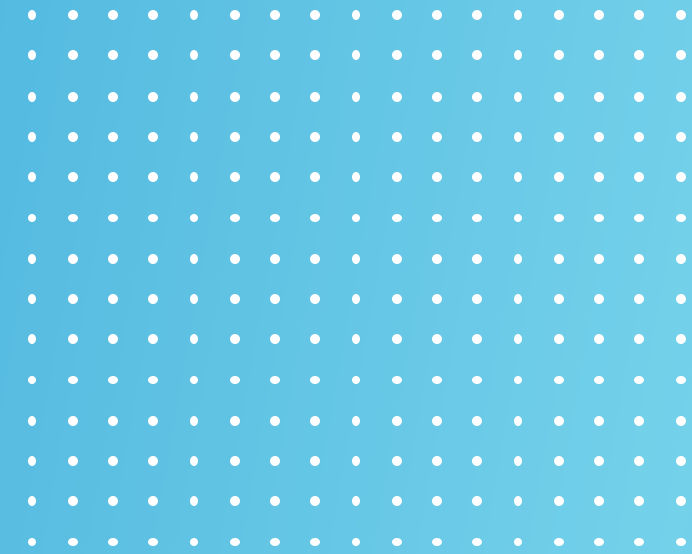


MHRA

- FY 25/26 Business Plan: risk-proportionate regulation, faster market access, “AI Airlock” sandbox
- Founding member, HealthAI Global Regulatory Network
- Clinical-trials regulations signed Apr 10; approval times cut to 150 days
- New Post-Market Surveillance rules live 16 Jun (broader data capture, faster incident reporting)

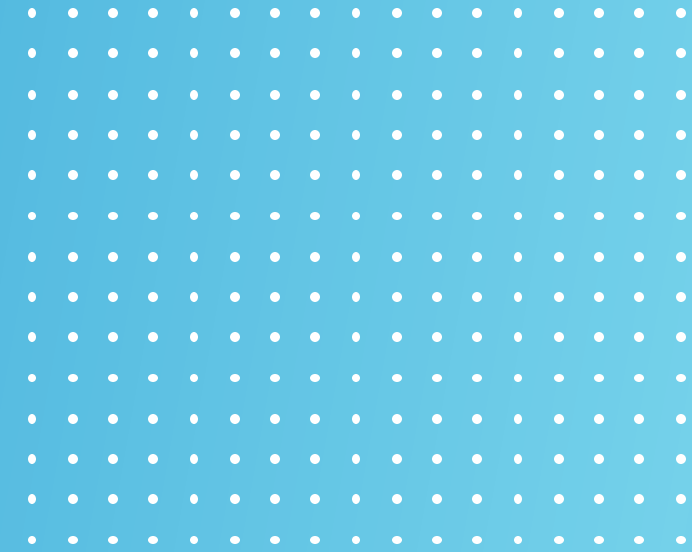
NICE

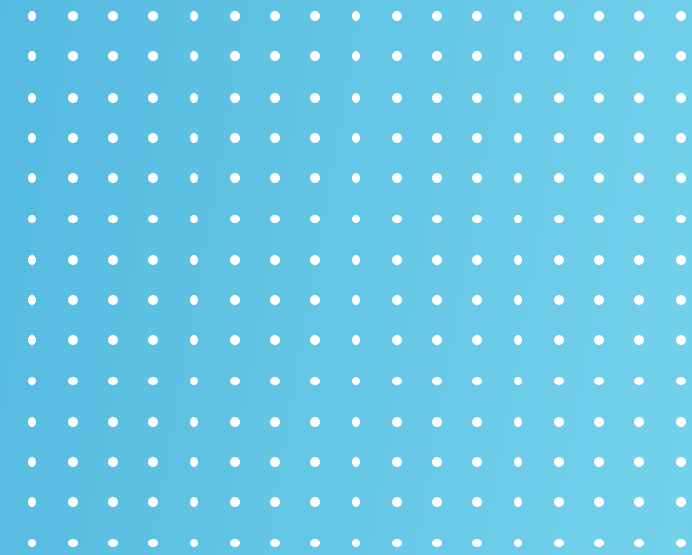
- 2025/26 Corporate Business Plan approved May
- Annual progress on tackling health inequalities; new guidance platform in development



What This Means for Industry

- **Digital readiness is table stakes:** suppliers must align to NHS App, SPR, and AI safety expectations
- **Value-based partnerships favoured:** SSRM selects few strategic vendors with demonstrable outcomes & equity impact
- **Faster regulatory pathways:** exploit shorter clinical-trial timelines & AI sandbox, but prepare for stricter PMS duties (Q2 2026)
- **Place-based innovation:** target coastal & deprived communities for pilots; aligns with 10-Year Health Plan funding streams
- **Watch devolved trends:** non-profit care (Wales) and prevention frameworks (Scotland, NI) signal divergent procurement asks





Thank you

