

stotles. x **techUK**

Health-tech health check  
**NHS suppliers' morning**

# Welcome 🙌



**John Witt**

Co-founder & CEO at Stotles

● **Aims of the day** 🎯

● **Diagnose** what's wrong with NHS supplier/buyer relationships 🤔

● **Prescribe** a remedy for achieving better outcomes for health-tech suppliers 💊

# Agenda.

- 09:00-09:20** | 'Check-up' with **John Witt**, CEO and Co-Founder of Stotles AND **Hassan Chaudhury**, Vice Chair for UK HIMSS Committee
- 09:20-10:00** | **Panel 1:** Are health-tech supplier & NHS relationships under the weather?
- 10:00-10:40** | **Panel 2:** How can we nurse NHS supplier/buyer relationships back to health?
- 10:30-11:00** | Break, pastries, coffee 🥐
- 11:10-12:00** | **Expert Hour:** Interactive challenge-solving workshop
- 12:10-12:25** | **Preventative care:** Concrete tactics for working with the NHS
- 12:25 - 12:30** | Close

# stotles.

The platform for  
doing business  
with government.

Trusted by thousands of public sector  
suppliers - big and small - including...

CIVICA



workday.

JUNIPER  
NETWORKS

M

 hippodigital

 freshworks

 snowflake

Medallia

ATKINS

M  
MOTT  
MACDONALD

 MultiTime

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# **Check-up**

## **Health-tech timeline**

# Health-tech timeline.

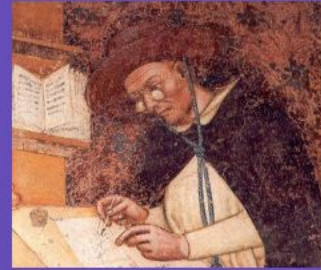
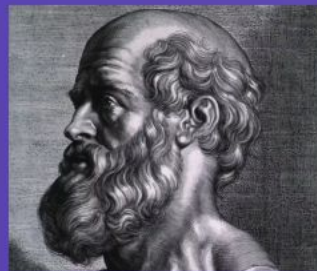


Scalpels, catheters, dental pliers, bone saws, specula, forceps, lancets and more...

**Ancient Egypt**  
4300-30BC

**Hippocrates**  
460BC

Used bone drills, forceps, scalpels

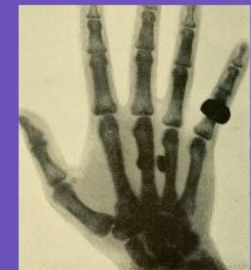


Glasses invented in Italy around 1000AD

**Medieval Period**  
470-1450AD

**19th Century**

Invention of the stethoscope and hypodermic needle, x-ray discovered in 1895



# Health-tech timeline.



Basic paper-based hospital and patient record-keeping became common practice

1900-1920s



Development of early statistics systems used to monitor public health

1930s-1940s

Iron lung invented to help patients paralysed by polio breath



1960

The first pacemaker is invented



# Health-tech timeline.



Introduction of mainframe computers in larger hospitals for managing patient records

1960s

1968

Clinicians at Massachusetts General Hospital establish telemedicine over closed-circuit television



First electronic patient record was developed

1972

Late 1970s

First attempts to standardise health IT systems and electronic health records





# Health-tech timeline.

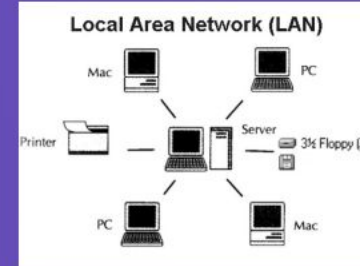


Adoption of personal computers in healthcare settings

1980s

1983

MRI scanners introduced to diagnostic healthcare

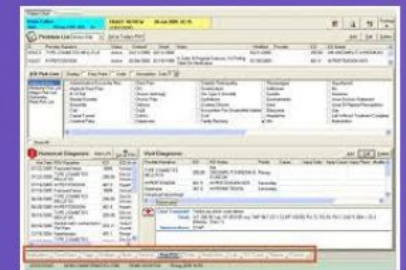


Introduction of LANs in hospitals to enable digital internal communications

1990s

Early 2000s

Rapid adoptions of electronic health records



# Health-tech timeline.



Launch of the NHS's 'National Programme for IT', one of the world's most ambitious health IT projects

2002

Mid 2000s

Introduction of NHS 'Connecting for Health' initiative, to bring in new IT infrastructure, including the Spine, and EHRs



NHS's 'National Programme for IT' faces significant challenges and criticisms, leading to restructuring and scaling back

Late 2000s

Shift towards a more localised approach to health IT, with individual NHS trusts making their own IT decisions



# Health-tech timeline.



Rapid growth in wearable health technology like fitness trackers and smartwatches



Accelerated adoption of telehealth and remote consultations due to the COVID-19 pandemic

2010s

2019

2020

Present

ICSs established which replaced all CCGs by 2022



Ongoing efforts to fully integrate and modernise EHRs, enhance patient data sharing across NHS services (Federated Data Platform) and improve patient access to digital health services



# What does this evolution tell us?

1. Health-tech looks like lots of **different things** (from medical devices, to IT infrastructure, to data-informed care)
2. Health-tech comes with **challenges to implementation** as much as it does success
3. There always has, and always will be, an **opportunity** for technology to progress healthcare

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# **Check-up**

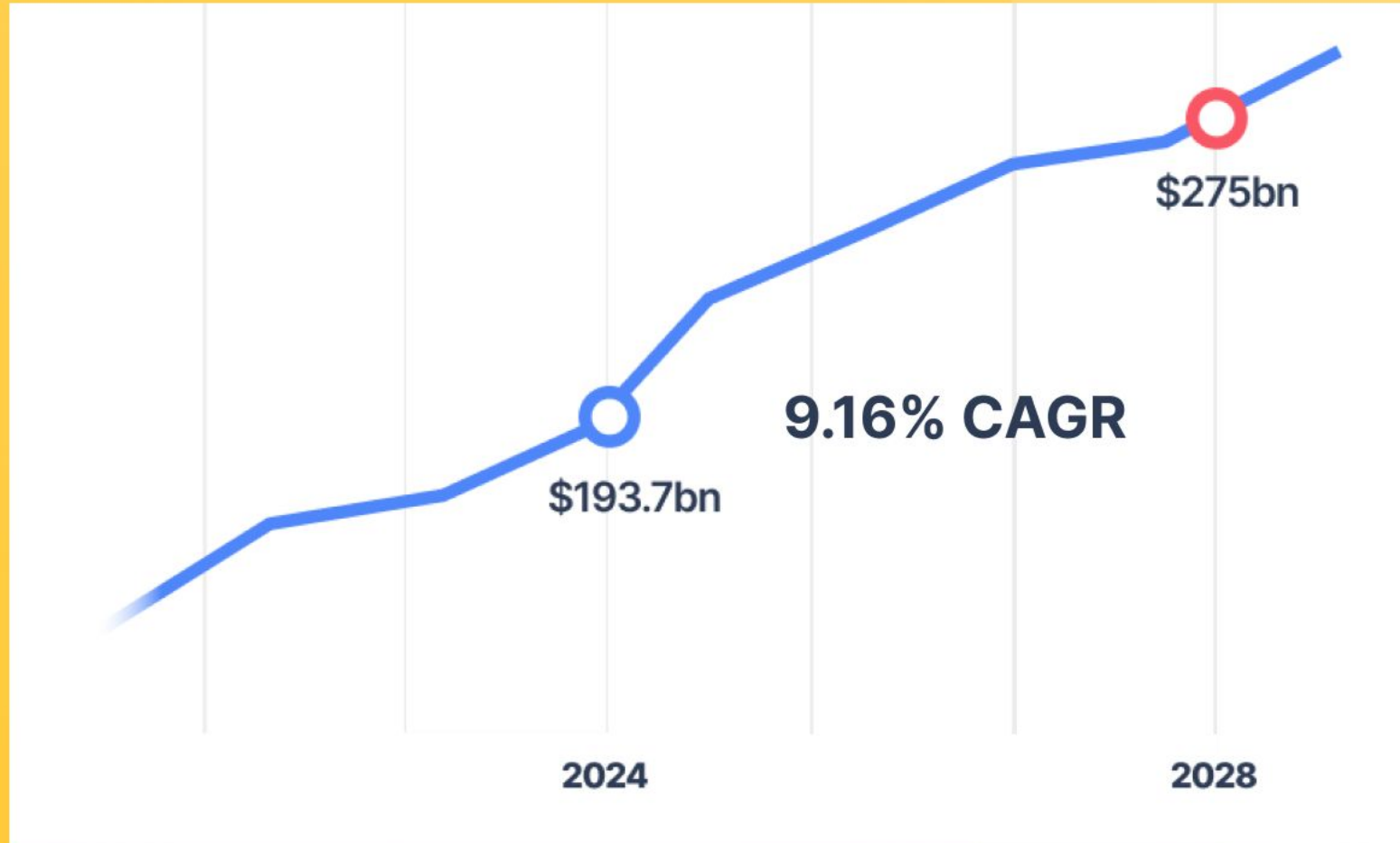
## **So, what's at stake?**

# Opportunity in the UK.



Revenue in the UK digital health market (USD)

# Opportunity globally.



Revenue in the global digital health market (USD)

But, opportunity means little....

...when you face **blockers to adoption.**



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# **Check-up** **Global digital maturity**

# Global Digital Maturity - 4 ways 🌍



**Hassan  
Chaudhury**

- Co-Founder of **Vita Health Care Solutions**
- Former Global Digital Health Specialist, Healthcare UK for the **Department for International Trade**
- Vice Chair of **UK HIMSS Committee**
- And the most well-known man in health-tech

# *Global Digital Maturity - 4 ways*

Hassan Chaudhury

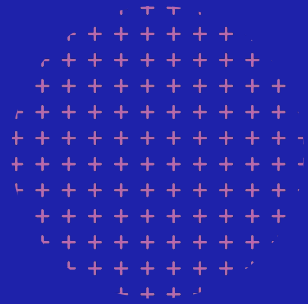
Vice Chair, HIMSS UK & Ireland

# *Vision*

To realize the full health potential of every human, everywhere.

# *Mission*

Reform the global health ecosystem through the power of information and technology.





# Global Leaders

Non-profit, 125,000+ individual members,  
430+ provider organisations, 500+  
nonprofit partners and 550+ health  
services organisations

# 6 HIMSS Maturity Models (i)

## Electronic Medical Records

Our Electronic Medical Record Adoption Model (EMRAM) helps you assess how you're adopting and using EMRs—to support patients and clinicians.

## Analytics

Our Adoption Model for Analytics Maturity (AMAM) helps you measure your analytics capabilities—and how you're using them.

## Infrastructure

Our Infrastructure Adoption Model (INFRAM) helps you improve your tech infrastructure, so you can smash your goals while meeting international benchmarks and standards.

# 6 HIMSS Maturity Models (ii)

## Community Care

Our Community Care Outcomes Maturity Model (C-COMM) assesses digital maturity across community care. That's vital, because most treatments are non-acute.

## Digital Imaging

Our Digital Imaging Adoption Model (DIAM) helps you evaluate and fine-tune *all* your digital imaging processes.

## Continuity of Care

Our Continuity of Care Maturity Model (CCMM) helps you assess how you're coordinating patient care across multiple sites, providers, and care settings.

# Digital Health Indicator (DHI) - <http://dhi.himss.org>

Here's what the Digital Health Indicator assesses:



## Governance and Workforce

You'll measure your data governance and security, and how well digital health is integrated into your workflows.



## Interoperability

You'll learn how connected your health systems are, and pinpoint hidden data interchange issues.



## Predictive Analytics

You'll uncover how advanced your use of predictive analytics is, across your clinical practice and operations.



## Person-Enabled Health

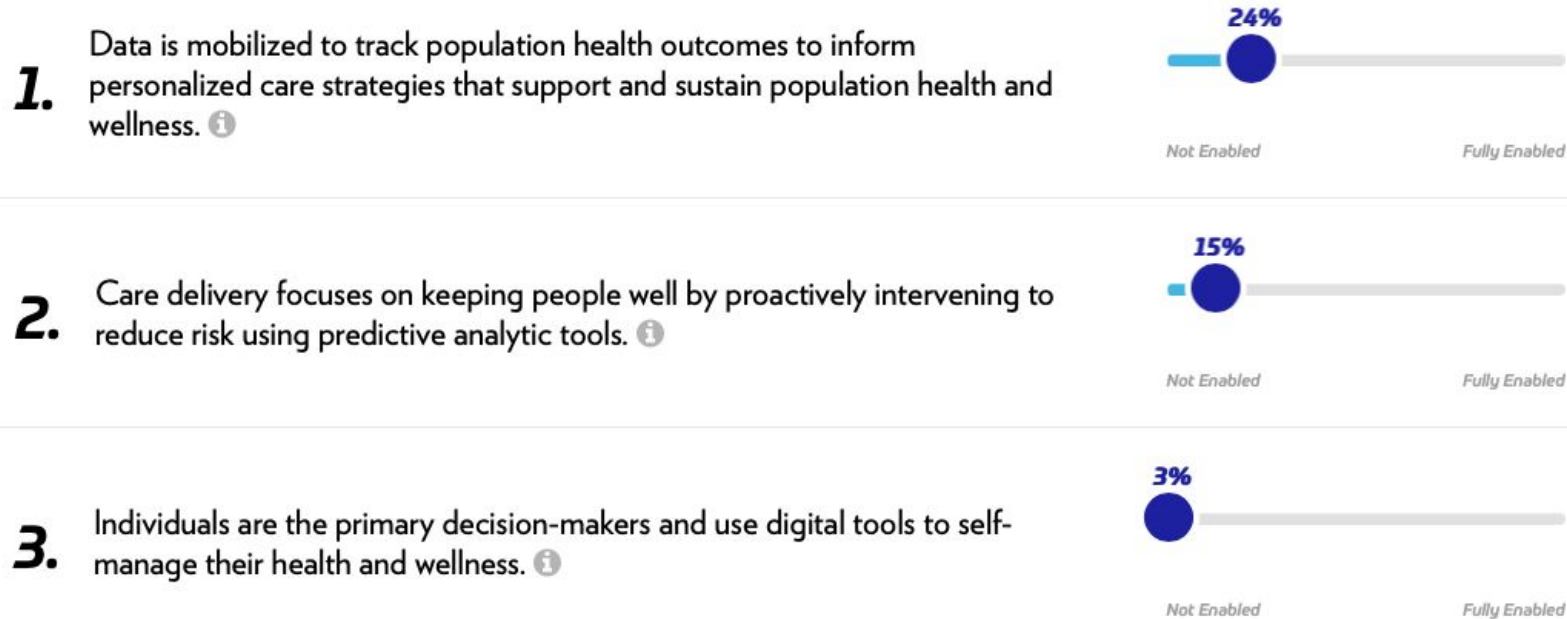
You'll assess your approach to person-enabled health, including patient portals and data-driven care.



- 1** Start
- 2** Interoperability
- 3** Governance & Workforce
- 4** Person-Enabled Health
- 5** Predictive Analytics
- 6** Maturity Models
- 7** My Report

## Person-Enabled Health i

The DHI measures personalized care delivery, proactive risk management and predictive population health through the Person-Enabled Health dimension. Rate your health system’s capabilities related to the following statements.

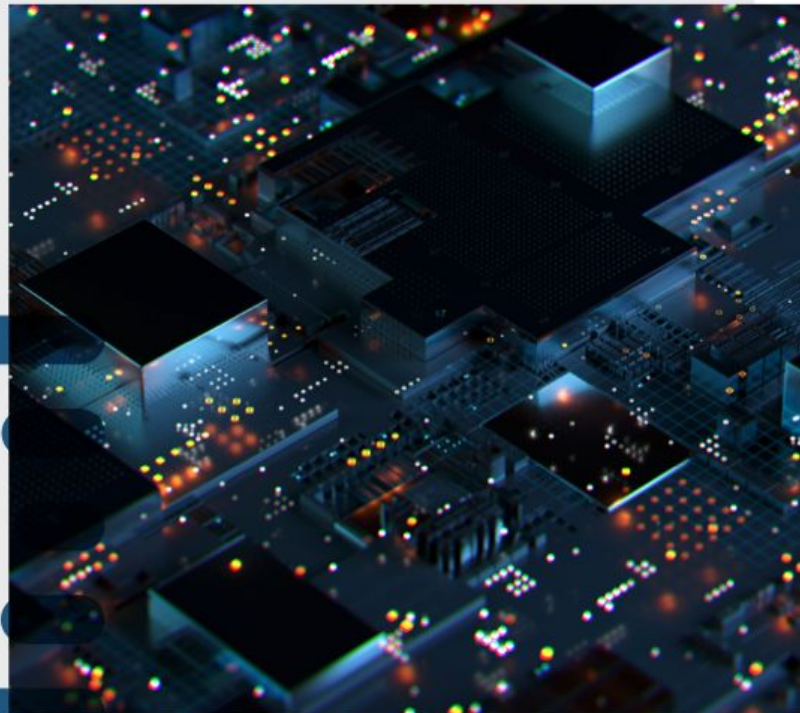


White Paper

## Switching On the Lights

*Benchmarking digital health systems across EMEA*

AURELIO ARIAS, ENGAGEMENT MANAGER, EMEA THOUGHT LEADERSHIP, IQVIA  
AARON WRIGHT, ANALYST, EMEA THOUGHT LEADERSHIP, IQVIA



## Initiatives Enabling Policies and Frameworks

### Policy

- Importance of digital health in policy
- Specific and temporal

### Funding

- Earmarked funding
- Transparency and ease of quantification

### Data governance

- Data security and privacy measures
- Control and ownership of data

### Institutions

- Named public and non-profit bodies with power to regulate and influence

## Infrastructure Platforms and Standards

### EHR

- Universal patient ID
- Type of info e.g. Vx, tests, scans, history
- Hospital and GP records

### Data standards

- Guidance on promoting common operating standards

### Interoperability

- Open standards and communication between different data owners

### Omics

- Genomics, Proteomics, transcriptomics, etc.
- Private and public
- Scale and quality

## Implementation Application of Data and Tools

### Telehealth

- Remote healthcare from diagnosis to medicine delivery
- Consultation to Doorstep remote services

### Artificial Intelligence

- All initiatives that use health data at a national scale
- Private ventures providing point solutions

### Information use

- Systematic collection of health data
- Measurement of patient outcomes
- Use of data by researchers and policymakers to make informed decisions

### Virtual studies

- Genomics, Proteomics, transcriptomics, etc.
- Private and public
- Scale and quality



**Initiatives**  
Enabling Policies and Frameworks

Policy	Funding	Data governance	Institutions
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**Infrastructure**  
Platforms and Standards

EHR	Data standards	Interoperability	Omics
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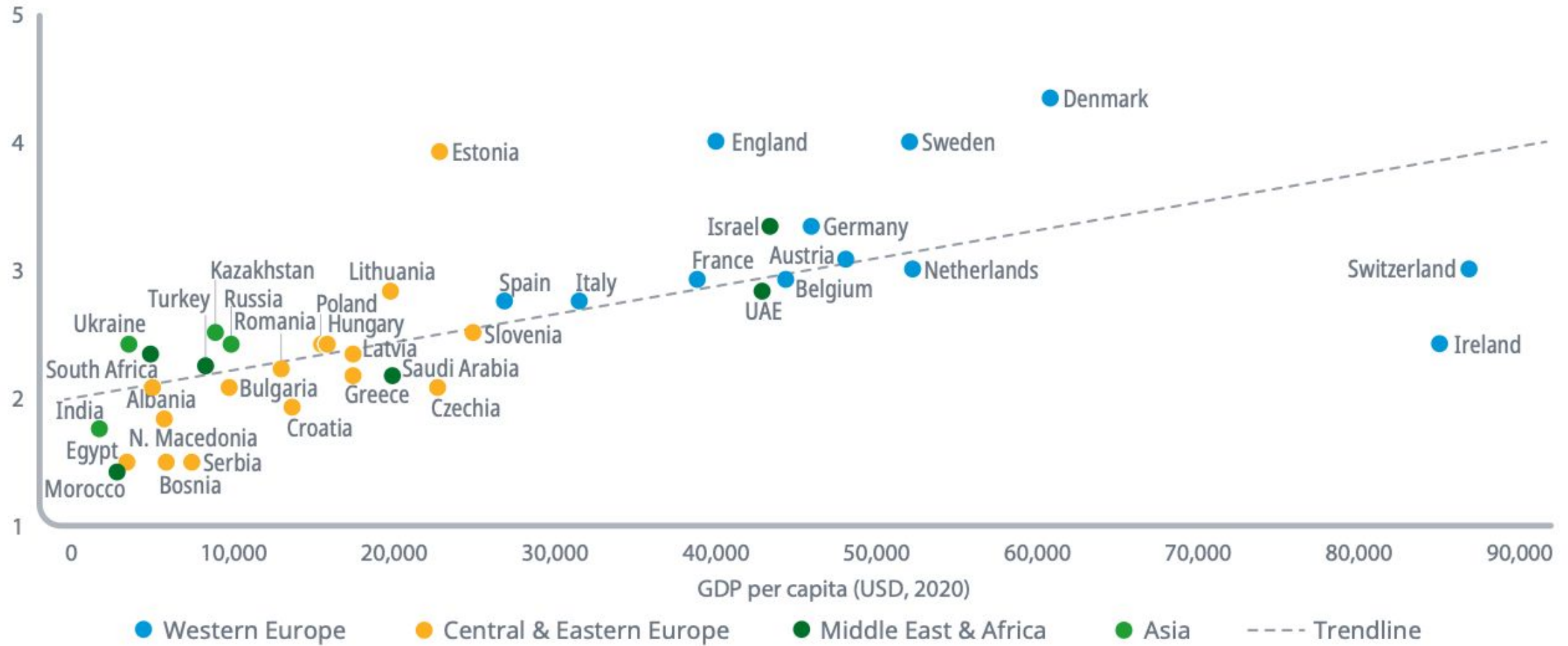
**Implementation**  
Application of Data and Tools

Telehealth	Artificial Intelligence	Information use	Virtual studies
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**Scored from 1 to 5**

- 5 - Sophisticated at a national scale
- 4 - Regional maturity and scaling
- 3 - Developing rapidly with potential
- 2 - Under-developed and challenged
- 1 - Very little digital progress

**Figure 2: Digital Health System Maturity Scores**



**Digital Health System Maturity Score**  
 A country's overall rating is constructed from 12 elements and scored against peers from 1 to 5

- 5 – Sophisticated at a national scale
- 4 – Regional maturity and scaling
- 3 – Developing rapidly with potential
- 2 – Underdeveloped and challenged
- 1 – Very little digital progress

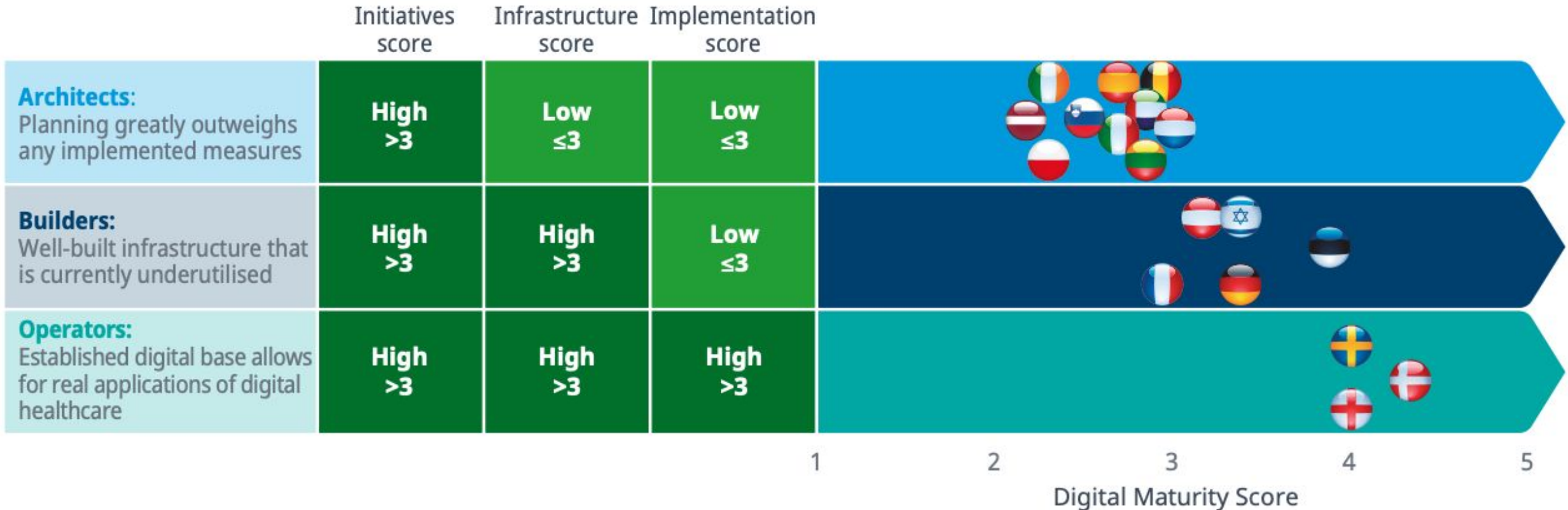


Smaller and centralised countries tend to fare well. Denmark, England, Estonia and Sweden are the largest positive outliers in our study. They are high on the maturity curve thanks to expansive genomic programmes, advances in decentralised trials and the use of national health data to make evidence-backed decisions.

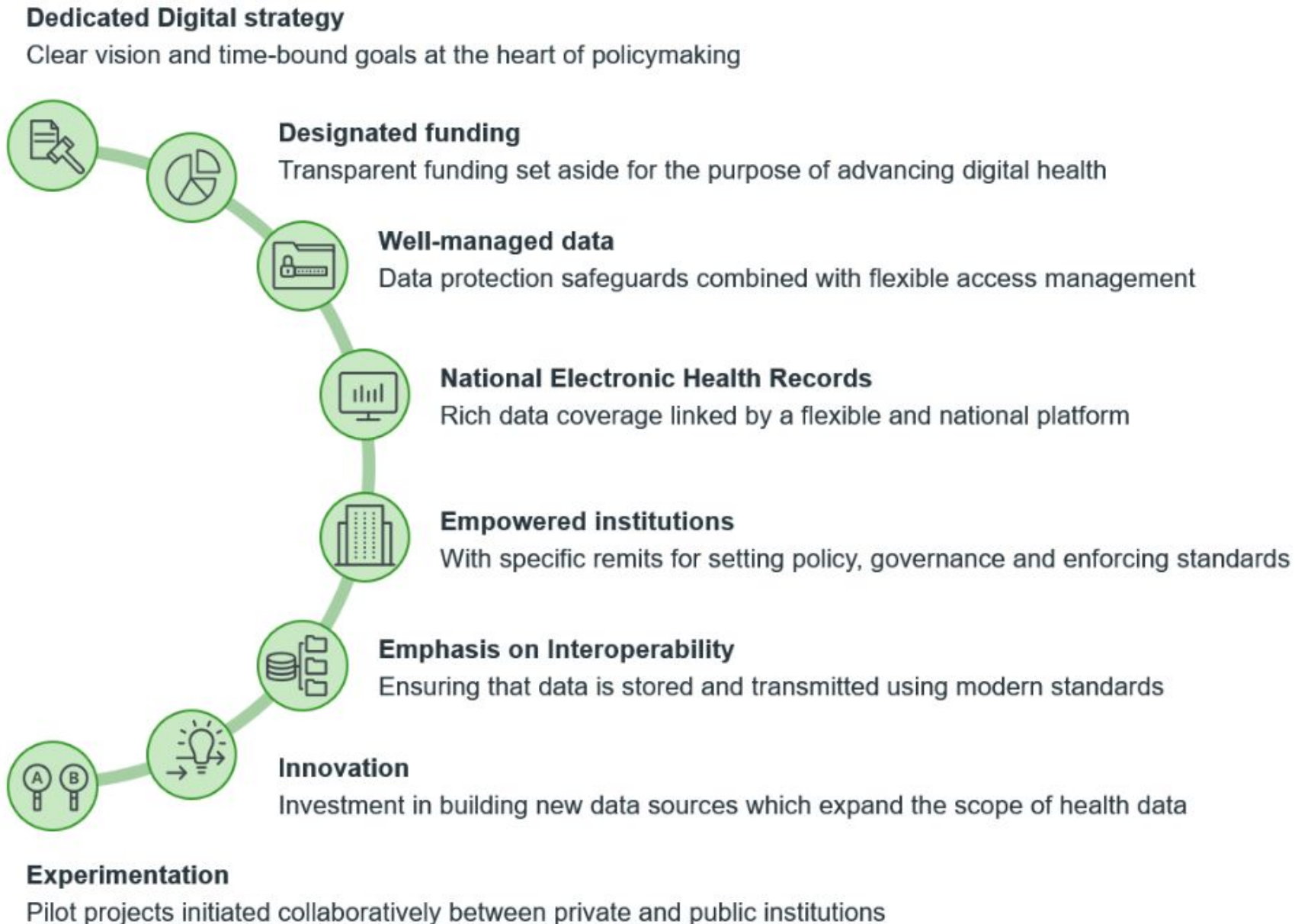
Aurelio Arias

*Director, IQVIA*

**Figure 5: Digital maturity archetypes**



## Figure 2: Digitally mature healthcare systems share common features



Source: IQVIA EMEA Thought Leadership



## **ELECTRONIC HEALTH RECORDS**

Nearly all countries covered in this paper have some form of EHRs in place. The key differentiators are the extent of coverage, ownership and data governance. The coverage includes domains such as physician visits, immunisation, infectious disease, pharmaceutical history, laboratory test results and medical imaging amongst others.

**Highest scoring countries:** Few countries excel in this area however Austria is one of note; their ELGA system links health records from multiple institutions into one system accessible by both patients and physicians and is very highly rated in this regard. Estonia launched its Electronic Health Record in 2008, the first in the world to fully implement a nationwide system<sup>7</sup> and is now used by 100% of patients. Additionally, it uses blockchain technology to further ensure the security of these records.<sup>8</sup>

**ECONOMIST  
IMPACT**

# Advancing the frontier of health and technology integration

**The 2023 Digital Health Barometer**



**Table 1: Individual country scores on the 2023 Digital Health Barometer**

Core pillar	Score range*	Australia	Brazil	France	Germany	Japan	Mexico	South Korea	Spain	UK <sup>†</sup>	US
Policy and governance	0-10	10	9	7	10	8	4	8	10	8	7
Adoption and acceptance	0-14	14	7	12	12	12	5	9	10	12	10
Implementation of digital health	0-10	10	8	8	9	7	4	6	7	9	5

■ 3-4/10 or 4-6/14    
 ■ 5-6/10 or 7-9/14    
 ■ 7-8/10 or 10-12/14    
 ■ 9-10/10 or 13-14/14

\*Higher scores are better

† As the UK has a devolved health provision for the four constituent countries - England, Scotland, Wales and Northern Ireland - the scores for some indicators are based on information relevant for England, which has the largest number of residents

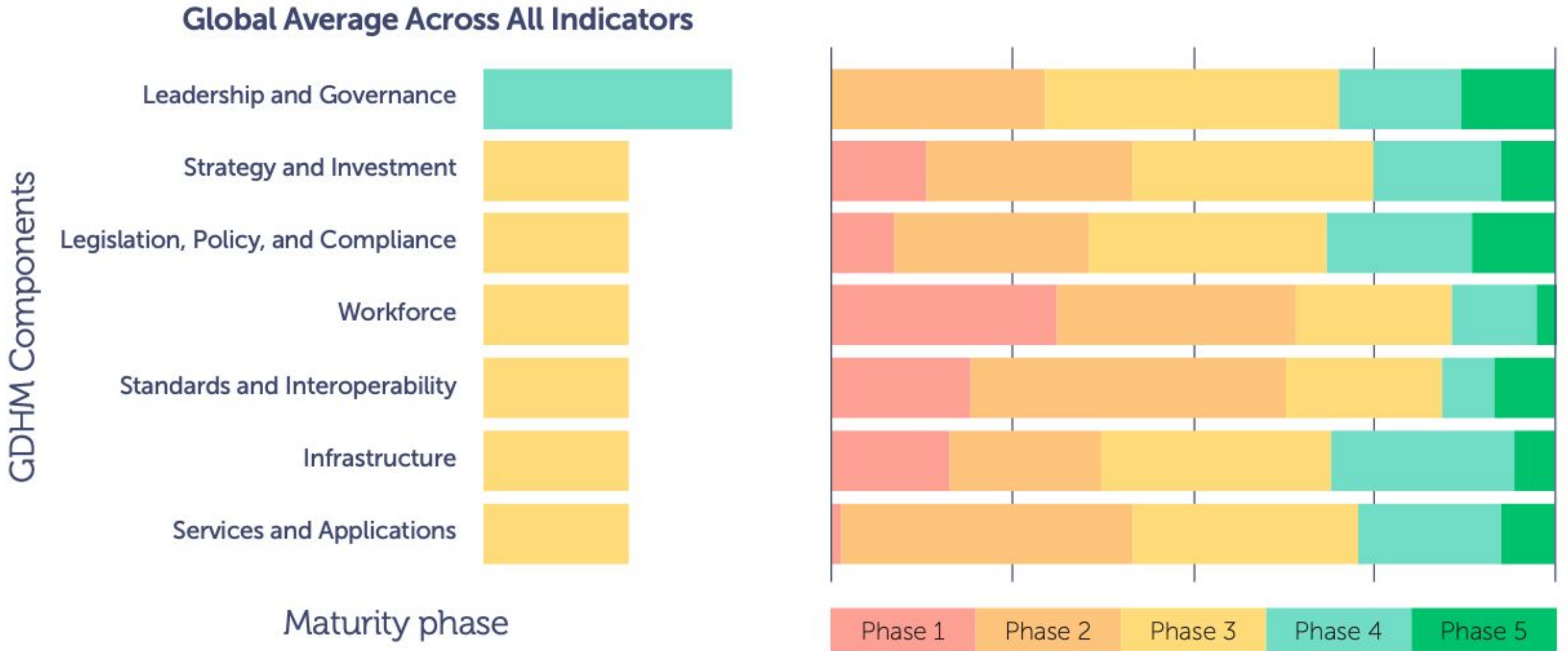
Source: Economist Impact

# The State of Digital Health 2023

## Global Digital Health Monitor



# GLOBAL DIGITAL HEALTH MATURITY PHASES BY COMPONENT



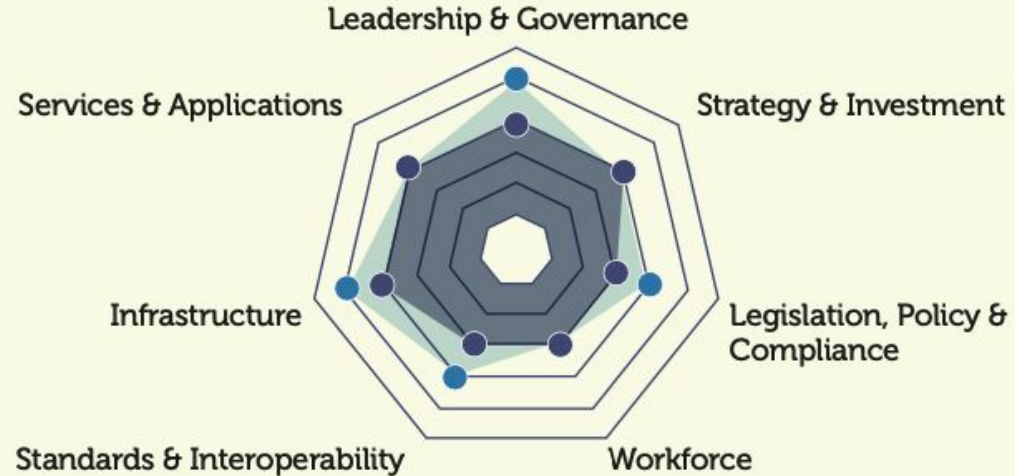
## CASE STUDY

# Zambia

Zambia underwent the GDHM assessments in 2021 and 2023, revealing overall stability in digital health maturity across most categories. Notable improvements were seen in Infrastructure, while there was a slight dip in Leadership & Governance. The GDHM served as a pivotal benchmark, providing a systematic evaluation of their digital health maturity. This evaluation became the foundation for the development of their national digital health strategy spanning from 2022 to 2026. A key takeaway from the GDHM process emphasized the imperative of concentrating on health workforce development in the realm of digital health, encompassing frontline health workers, health systems managers, and IT professionals. Additionally, the assessment shed light on the necessity for robust, supportive policies and the integration of digital health into broader government initiatives.

### PHASE OVERVIEW

- Zambia
- Global average



## CASE STUDY

# The Philippines

The Philippines completed the GDHM in 2018 and again in 2023. Over this five-year period, they recorded improvements in the areas of Legislation, Policy & Compliance; Infrastructure; and Services & Applications. They continued to score highly in Strategy & Investment; and noted a decrease in maturity in the areas of Leadership & Governance; and Standards & Interoperability. Key insights that came out of the process of completing the GDHM included a recognition of the major role that the private sector is playing in digital health within The Philippines. This provides an opportunity for the government to focus less on services and applications, and more on policies, standards and frameworks. In addition, they have noted a need (whether through the government or private sector) to increase attention towards patients, service providers, and health system managers, especially to use AI to improve efficiency in health service delivery and decision-making.

## PHASE OVERVIEW



## CASE STUDY

# Maldives

Upon completing the GDHM in 2023, stakeholders from the Maldives Ministry of Health uncovered invaluable insights that have guided a strategic approach to advancing their digital health maturity. The assessment revealed notable areas for improvement, particularly in Legislation, Policy, and Compliance; Standards and Interoperability; as well as Infrastructure. Armed with this knowledge, they have adopted a more deliberate focus on foundational investments, recognizing the importance of a holistic perspective beyond digital health applications. Notably, the GDHM facilitated the identification of 'quick wins,' exemplified by the commitment to ensuring gender representation on digital health steering committees. This comprehensive approach positions The Maldives Ministry of Health to not only address immediate needs but also build a resilient and sustainable digital health ecosystem for the future.

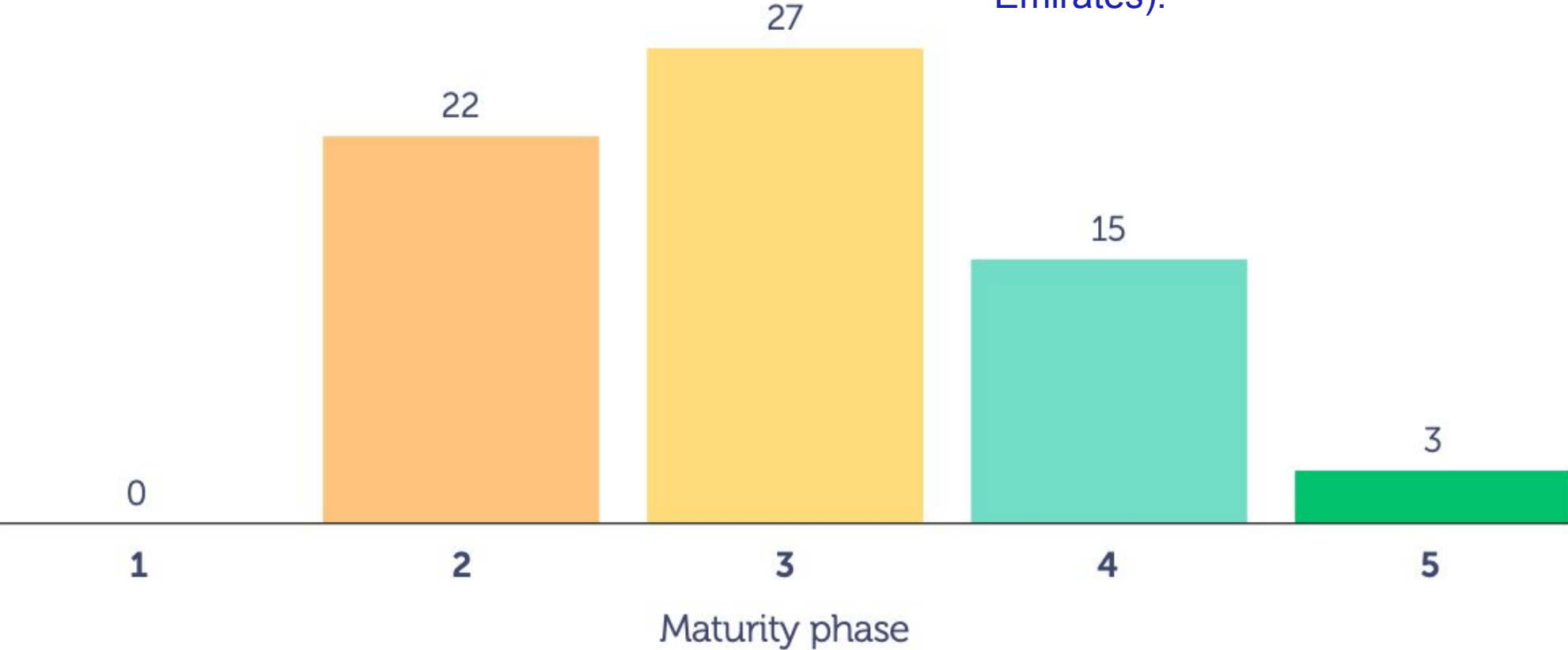
## PHASE OVERVIEW





# PARTICIPATING COUNTRY MATURITY BY PHASE

Number of countries



Three participating countries (4%) are in Phase 5 (Portugal, Saudi Arabia, and the United Arab Emirates).

### State of Digital Health around the world today

The Global Digital Health Monitor (GDHM) is an interactive web-based resource that aims to track, monitor, and assess the enabling environment for digital health throughout the world.

Phase 1 2 3 4 5 NA

#### Search Country



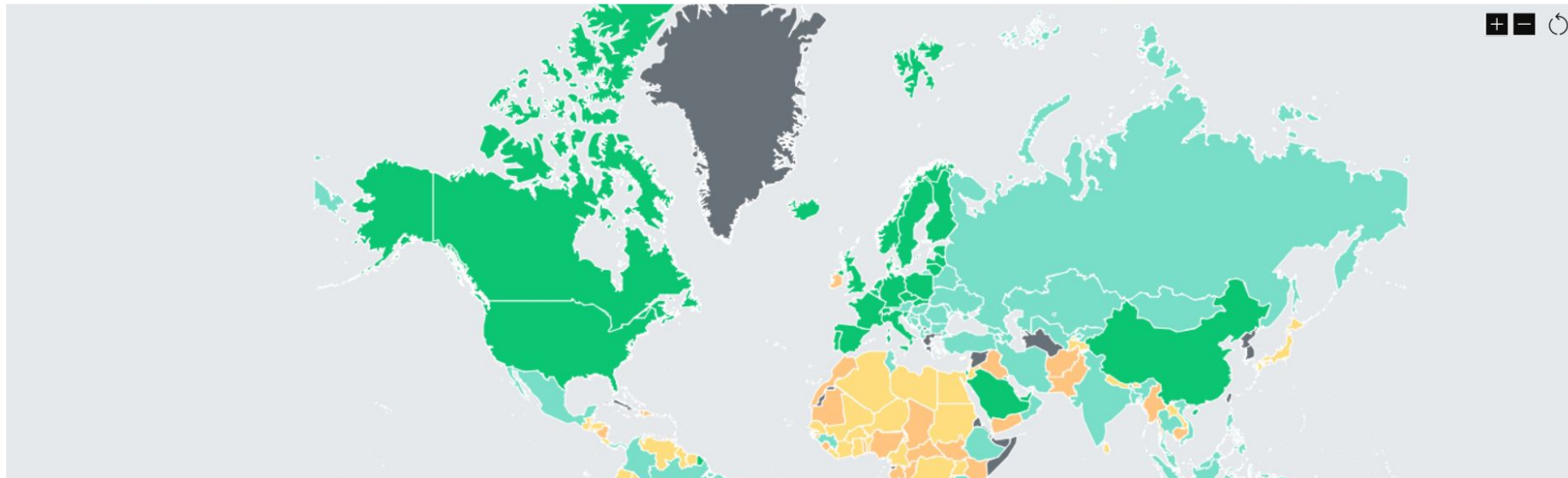
#### Indicator

Overall



#### Phase

All



# 4 Ways to Explore Digital Maturity

## We examined the following:

1. HIMSS models
2. IQVIA 'Switching on the Lights' - Benchmark for EMEA
3. Economist Impact – 2023 Digital Health Barometer – for 10 nations
4. Global Digital Health Monitor (GDHM) - 67 nations

*Thank you*

Hassan Chaudhury

Vice Chair, HIMSS UK and Ireland

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# **Check-up**

# **What's holding the NHS back?**

**That's why we're  
all in the room.**

# Rules of engagement.

- **Aims of the day** 🎯
- **Diagnose** what's wrong with NHS supplier/buyer relationships 🤔
- **Prescribe** a remedy for achieving better outcomes for health-tech suppliers 💊

# Rules of engagement.

**Diagnose**

**Prescribe**



**Be realistic**

**Be forward-looking**



# Rules of engagement.

## Realistic

We know what is, and isn't, within our power to change when it comes to adoption

Things are challenging and the NHS landscape is harder to navigate than ever before

Political and socioeconomic barriers to adoption must be changed from the centre

**BUT**

**BUT**

**BUT**

## Forward-looking

We *can* strategise how we respond to all of these challenges

This shouldn't prevent us from thinking about the things we *can* get right

We are a room of experts, and our experiences can help equip each other to navigate this

# Rules of engagement.

1. Be **constructive**

2. **Focus on the symptoms,**  
not the complaints

3. **Seize this opportunity** to  
use your collective expertise

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**Panel 1: Are health-tech supplier  
& NHS relationships looking  
under the weather?**

# Panel 1: Are health-tech supplier & NHS relationships looking under the weather?

Host



**John Witt**

Co-founder & CEO at Stotles

# Panel 1: Are health-tech supplier & NHS relationships looking under the weather?



**Alex Lawrence**

Head of Health and  
Social Care at TechUK



**Douglas Hamandishe**

Healthcare Digital Transformation  
Thought Leader, Labour Councillor,  
Health-Tech Consultant



**Janet Broome**

NHS Account Director at  
Snowflake



**Uko Umotong**

Co-Founder of UB Healthcare,  
Director of Clarity Health  
Systems

# On a scale of 1 to 10, how unwell to you think health-tech supplier relationships are with the NHS?

Where 1 is a clean bill of health and 10 is “on death’s door”?

**Panel 1:** Are health-tech supplier & NHS relationships looking under the weather?

# Contributing factors: What are the events that led us here?

**Panel 1:** Are health-tech supplier & NHS relationships looking under the weather?



# **Contributing factors: What are health-tech suppliers *and* the NHS doing wrong in their relationship with each other?**

**Panel 1: Are health-tech supplier & NHS relationships looking under the weather?**



**What is the biggest challenge health-tech suppliers need to overcome to get out of this state, and why?**

**Panel 1: Are health-tech supplier & NHS relationships looking under the weather?**

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**Panel 2: How can we nurse NHS  
supplier/buyer relationships back  
to health?**

# **Panel 2:** How can we nurse NHS supplier/buyer relationships back to health?

Host



**Jody Gilligan**

Growth Lead at Stotles

# Panel 2: How can we nurse NHS supplier/buyer relationships back to health?



**Leontina Postelnicu**

Policy and Public Affairs Lead at Feebris, Vice Chair of UK HIMSS Committee, Former Head of Health and Social Care at TechUK



**Steve Dunkerly**

Chief Commercial Officer NHS  
London Procurement Partnership



**Hassan Chaudhury**

Co-Founder of Vita Health Care Solutions, Former Global Digital Health Specialist, Healthcare UK for the DIT



**Liam Cahill**

Health-Tech Thought Leader  
and Advisor to the NHS

**What is the biggest challenge health-tech suppliers need to overcome to get out of this state, and why?**

**Panel 2: How can we nurse NHS supplier/buyer relationships back to health?**

# **How can health-tech suppliers better work with the things that are outside of their control?**

**Panel 2: How can we nurse NHS supplier/buyer  
relationships back to health?**

**What should health-tech suppliers  
be doing to work better with the NHS  
to get their solutions in place?**

**Panel 2: How can we nurse NHS supplier/buyer  
relationships back to health?**

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Preventative care

**Concrete tactics to stay in top shape**



# Concrete tactics

## How can we help?



**John Witt**

Co-founder & CEO at Stotles



**Carsten Schaltz**

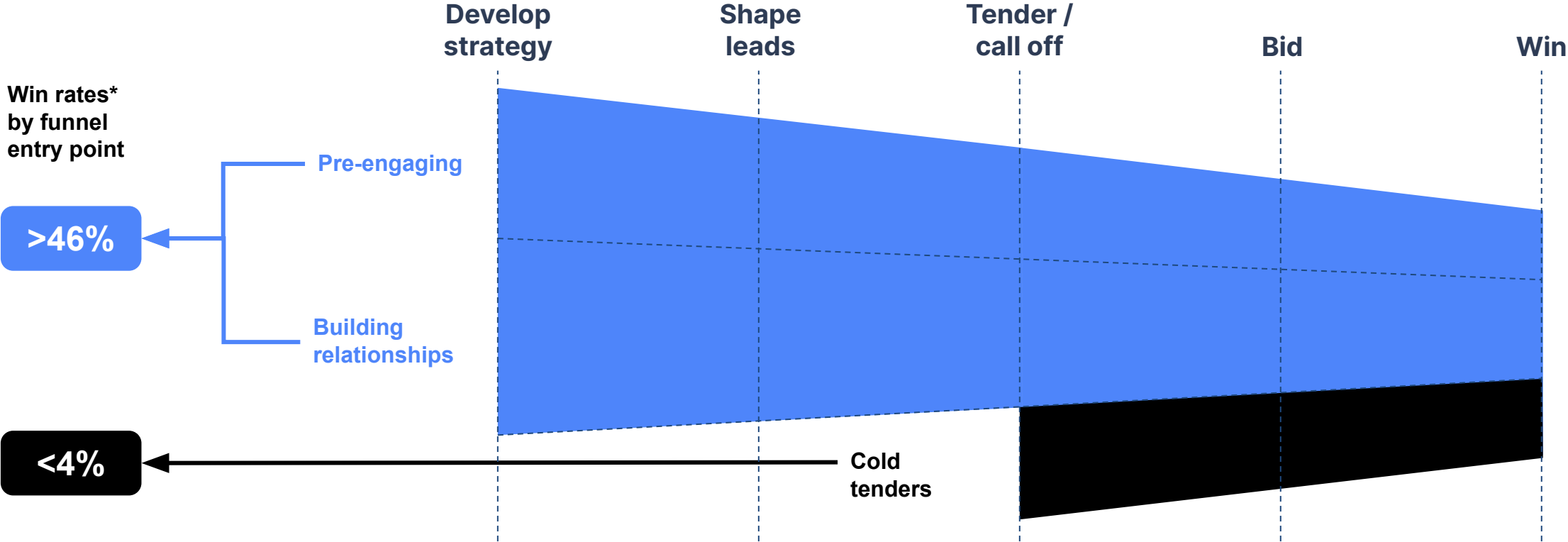
Co-founder & CPO at Stotles

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# How market-leading suppliers are **getting ahead in healthcare.**

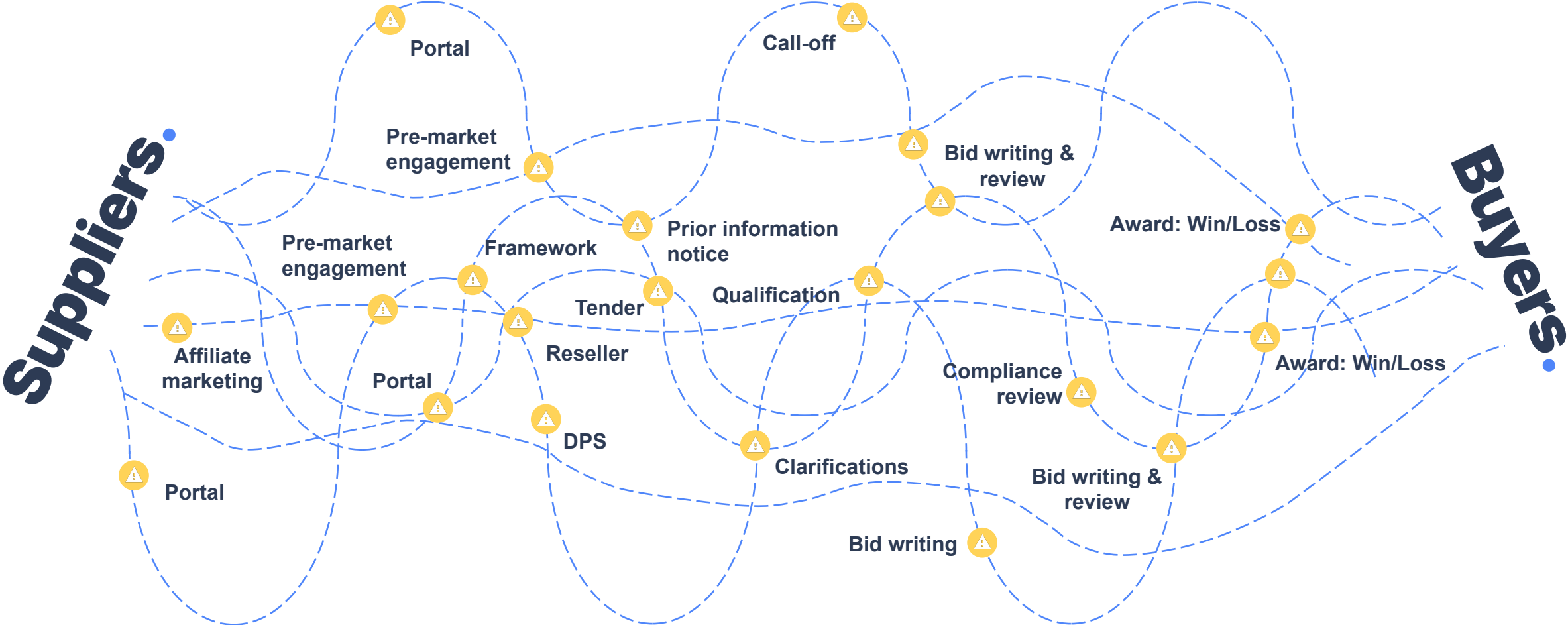


# Proactive strategies drive real revenue growth

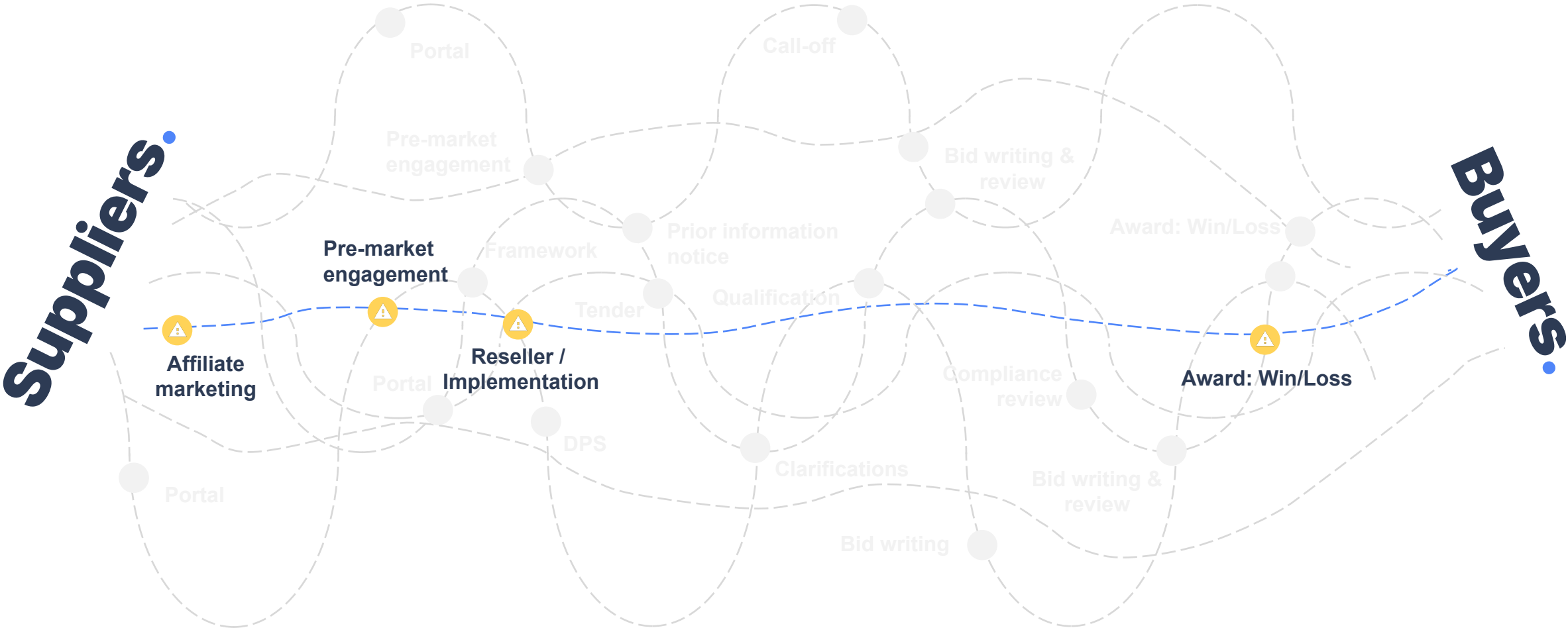


# Getting proactive is easier said than done.

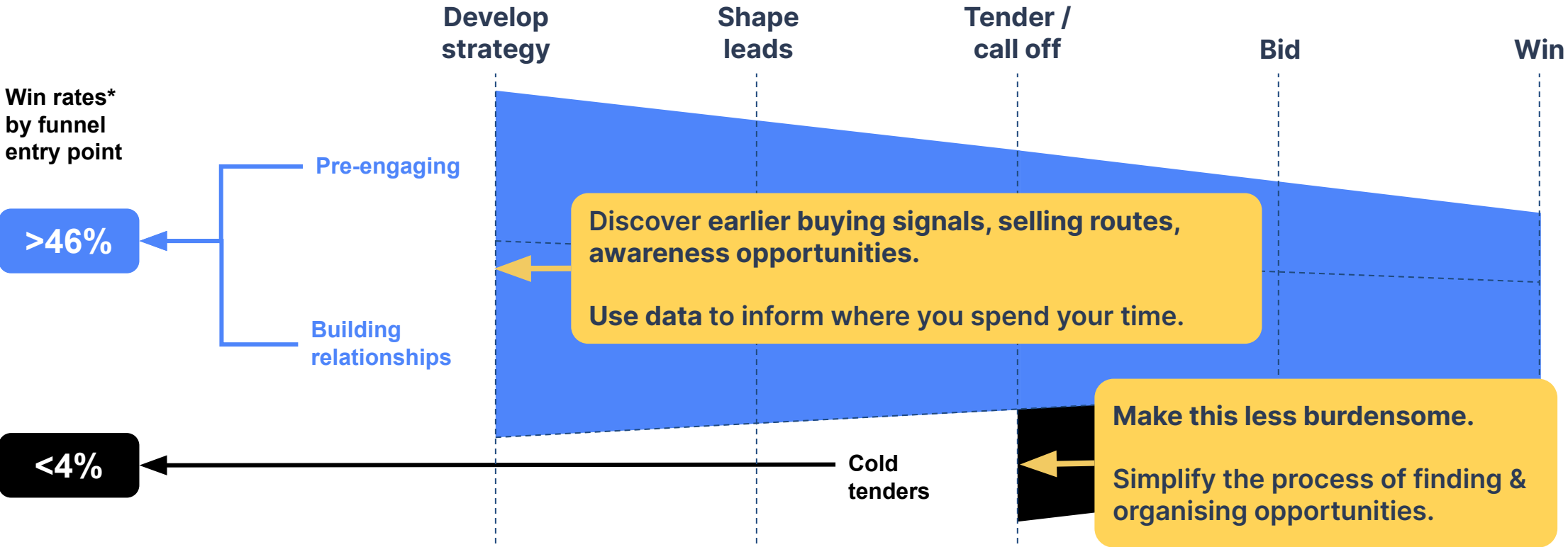
Most suppliers fall prey to a reactive "spray and pray" approach.



# Use focus to leapfrog complexity.



# But how, actually, can you focus to get proactive.



# 01 Right buyers

## Use early buying signals in data to sharpen your focus



### Buyer Strategy Document

Software Design  
Cloud based  
Cappgemini  
Deloitte  
Accenture  
Fujitsu

### Buying signal

Last active 1 year ago

Upcoming expiries

# 12

Keywords

### NHS Black Country NHS Trust

88% Relevance

### DHSC

58% Relevance


### ment

22% Relevance

## 02 Right people


# Map the influencers to build better relationships faster


Filter By: Seniority ▾ Function ▾


 **Head of Digital**


\_\_\_\_\_

\_\_\_\_\_

 \_\_\_\_\_


 \_\_\_\_\_


 \_\_\_\_\_


 **CDIO**

\_\_\_\_\_

\_\_\_\_\_


 \_\_\_\_\_


 \_\_\_\_\_


 **IT Manager**

\_\_\_\_\_

\_\_\_\_\_


 \_\_\_\_\_


 \_\_\_\_\_


 **Board Member**

\_\_\_\_\_

\_\_\_\_\_

 \_\_\_\_\_

 \_\_\_\_\_

 **Black Country NHS Trust**

\_\_\_\_\_


\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Partner**

 **Microsoft**

Last active 19 days ago

Relevant awards

**4**

Keywords

\_\_\_\_\_

\_\_\_\_\_



### 03 Right message

Use data to stand out with a more personalised approach



# In summary.

Faster path to healthy pipeline comes via focused systematic **early engagement**.

**01**

**Right  
buyers.**

Use early buying signals to  
sharpen focus

**02**

**Right  
people.**

Map relationships to  
find influencers faster

**03**

**Right  
message.**

Make your message more  
personalised & relevant

# Our product vision & roadmap.



## Frameworks

Know where you should be, and where others are

Q1

Q2



## Market analysis suite

Visualise your market to uncover trends & opportunities



## Document AI

Surface key insights from a mountain of data

Q3

Q4



## Topic search

Searching relevance brought to the next level





Notices ▾

Frameworks

Spend

Buyers ▾

Suppliers ▾

Reports

# Notices



## Relevant notices

All notices that match your signal settings.

## Open Opportunities

Open tenders that match your signal settings.


## Upcoming Contract Expiries

Contract awards matching your signal settings due to expire.

 Filters

17,221 Notices • Sorted by **Published date** • Filtered by

Signals 

Qualification 

 Clear Filters



Signal score



Notice Title & Buyer



Stage

# Our product vision & roadmap.



## Frameworks

Know where you should be, and where others are

Q1

Q2



## Market analysis suite

Visualise your market to uncover trends & opportunities



## Document AI

Surface key insights from a mountain of data

Q3

Q4



## Topic search

Searching relevance brought to the next level



# Get exclusive early access.

Be the first to access  
Stotles' framework intelligence



# What are the available remedies.

## **Diagnosis**

Suppliers can be better at....

**Acceptance** of reality

=

**Understanding** your counterpart

=

**Communication** that's relevant

=

**Objective** alignment

=

## **Prescription**

Doing this looks like...

**Building organisational resilience**  
(capital, culture, product)

**Doing the homework** to deeply understand  
(the system, the buyer, the person, the patient)

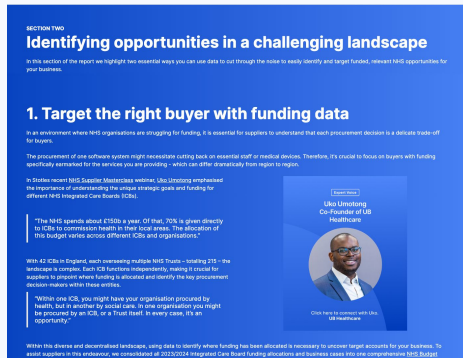
**Develop relevant and compelling messaging**  
(to aligns to your customer's pains/priorities)

**Staying "in the know" to shape your offering**  
(policy, programmes, goalposts)

# Resources to take action.

## Industry reports

### NHS 2024 Guidebook



[Click to access report](#)

## Best practices & ROI



## Exclusive early access

### Frameworks waitlist

5. Notices Frameworks Spend Buyers Suppliers Reports

Frameworks /  
Contract list - Expiring in 18 months  
**Audit & Assurance Services (A&AS)**

Overview Suppliers Buyers **Contracts**

Search supplier name and bids Filters

52 Call-offs - Sorted by Published date

Signal score	Call-off / Buyer	Supplier	Value
3	WP3037 - Internal Audit Services via RMR188 CCS Framework - ... Walsall Council e-Tendering	Mazzars LLP	£ 103,000
3	Internal Audit 2024 Board of Trustees of the Royal Botanic Gardens Kew	Mazzars LLP	£ 98,000
2	Auditor for Bus Reform Outline Business Case	KPMG LLP	£ 1,300,000

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Health-tech health check  
**NHS suppliers' morning**