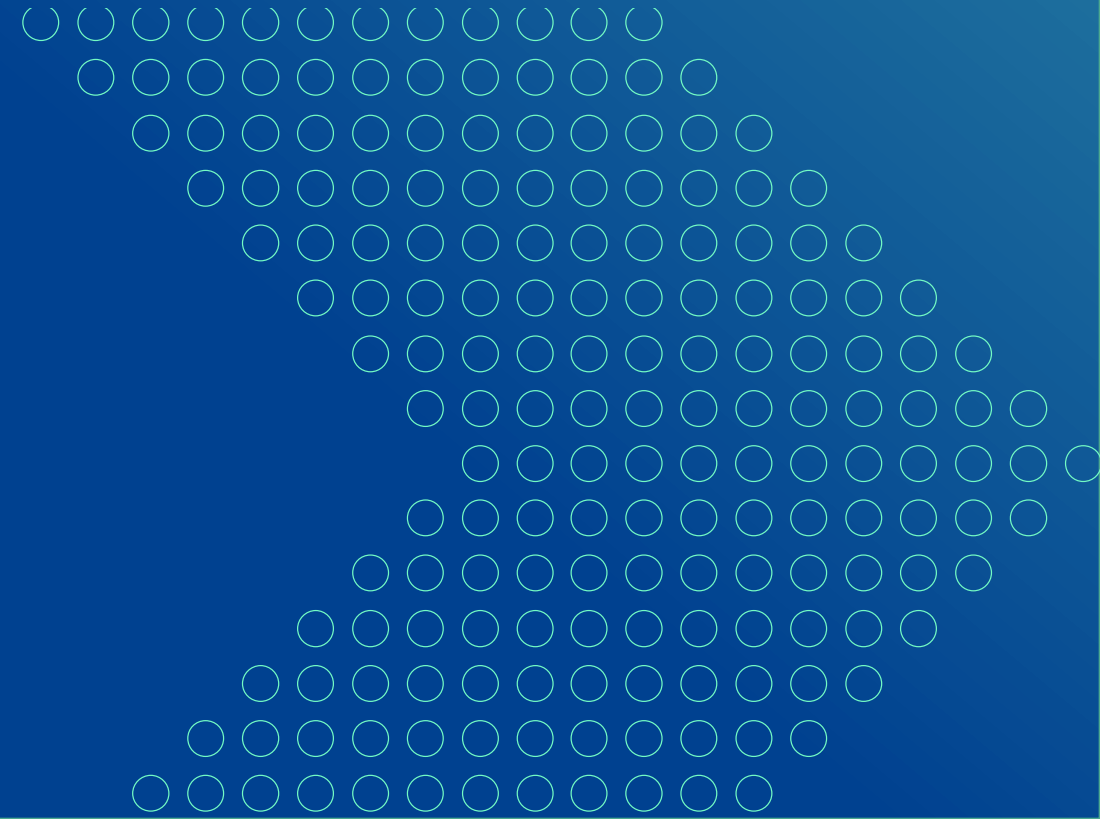


# What to Expect from the UK Life Science Sector Plan

Paul Blakeley

Government Affairs Director, Newmarket Strategy



# Who am I and what am I here to talk to you about?



I have over a decade of experience in the UK Civil Service, including working directly with ministers within the Office for Life Sciences (OLS)

I then spent several years at the Tony Blair Institute for Global Change (TBI), working with various governments on the future of health and life sciences

I am now the Government Affairs Director at Newmarket Strategy - a specialist market access consultancy working across health and life sciences

# Objectives

We are about to see two new national strategies launched:

1. The Life Sciences Sector Plan (LSSP)
2. The NHS 10-Year Health Plan (10YHP)

Both documents will have direct implications for how innovations, including orthopaedic and MSK technologies, are funded, evaluated, and adopted.

This session aims to:

- Explain what these strategies are likely to include
- Unpack how they relate to MSK and orthopaedics
- Outline immediate and medium-term opportunities
- Highlight what you and your organisations should do to align and respond



# 1. The Political and Policy Environment

# Growth is the goal

“Growth is the only game in town” – across all departments

In health, this means:

1. **Reducing long-term sickness**
2. **Increasing workforce participation**
3. **Supporting innovation-led growth sectors** (including life sciences)

**MSK identified as top 2 cause of working-age ill health** (with mental health) – 2.5m people out of work

Healthier population = more productive workforce = national growth

So MSK is no longer just a clinical priority — **it’s an economic and productivity challenge.**



# NHS reforms will be built around three major shifts



Reforms will be driven by three 'big shifts'

1

From Hospital to Community



2

From Analogue to Digital



3

From Treatment to Prevention





# Reality Check – the NHS Under Pressure

NHS target - **92% of elective patients treated within 18 weeks by March 2029** (interim milestone: 65% by March 2026)

To get there:

1. Elective activity must grow 2–4.9% per year
2. NHS must prioritise long waiters and reduce unnecessary referrals

The focus, at least in the short-term, will be **improving NHS day-to-day operational performance.**

Achieving this will require:

1. Increased surgical volumes
2. Prioritisation of long-wait patients
3. Better discharge flow and care coordination
4. Avoiding inappropriate referrals through better triage



# Reform + Recovery = Opportunity

NHS reforms and operational plans are **not separate** — they are interdependent. NHS leaders are looking for solutions that serve **both** the long-term vision **and** the immediate need to reduce waits.

System needs solutions that:

1. Boost elective throughput
2. Free up workforce capacity
3. Support community-based and preventative care

**MSK and orthopaedics is uniquely placed to deliver on all fronts** — if framed correctly

MSK innovations that demonstrate **measurable operational impact** — reducing long waits, increasing throughput, supporting community care — will gain traction.





## 2. What we Know and What We Can Expect

# Funding will be tight and targeted

## Spending Review 2025 outlines:

- Real-terms uplift for DHSC and NHSE
- 3% NHS funding uplift — below demand growth and historical average
- Capital budgets flatlining after 2026 (CDEL constraints)

## Key investment areas:

- Digital infrastructure (EPRs, data platforms)
- Tech for productivity (ambient voice, AI, automation)
- Innovation with measurable health *and* productivity impact

## The £10bn Tech Transformation Fund (over 5 years) will go to tools that:

- Save time and drive productivity
- Improve outcomes
- Reduce costs



# The Life Science Sector Plan will be Aligned to the New UK Industrial Strategy

## Life science ambitions



Driving early-stage science, including basic research



Improving access to finance, skills, and support for UK manufacturers



Driving health innovation and NHS reform



Prioritising frontier pharmaceutical and MedTech industries



Unleashing the economic potential of life sciences clusters

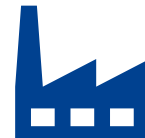
## Key Life Science Interventions



The creation of the Health Data Research Service



Acceleration of Clinical Trials, including <150 day set-up times



£250m to build domestic UK manufacturing capacity



Streamlining regulation via the MHRA and NICE



Reforming procurement, including the NICE Rules-based Pathway

# The 10 Year Health Plan will set out the vision and priorities for the future of the NHS

Key commitments may include:

1. **A return of National Service Frameworks** (e.g. for cardio-metabolic, MSK)
2. **Greater autonomy** for high performing trusts (a return of the FT-model)
3. **The introduction of a 'Year of Care' Tariff** – bundled pathway payments encouraging prevention and early intervention (but potential double running costs for ICBs)
4. **The reintroduction of Private Finance Initiatives** – likely focussed on community infrastructure
5. **New commissioning models including outcome-based payments** – aligned to workforce, health and economic productivity targets
6. **A growing emphasis on local and regional delivery** – with a smaller number of central targets

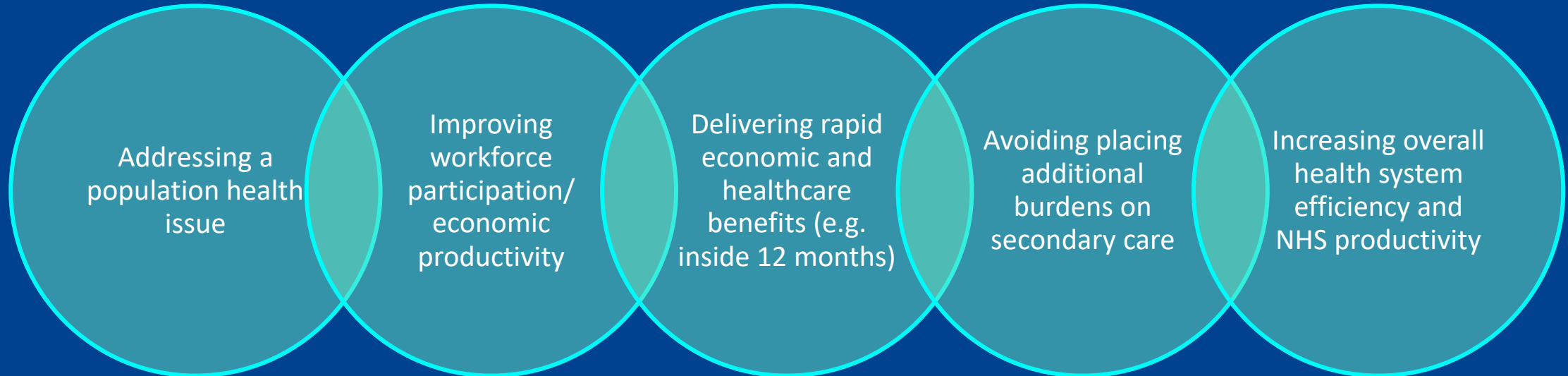


### 3. The MSK Opportunity



# Once these strategies are launched, government will want to show their impact

This means launching more large-scale partnerships with industry, with the ideal partnerships....



# What Can ORUK and Others Do?

## **Leverage existing policy commitments, for example:**

1. MSK is now officially linked to economic recovery
2. Advocate for trial accelerators to fast-track orthopaedic innovation
3. Collaborate with HDRS to build MSK data sets and outcome tracking

## **Position surgical innovation and digital rehab as exemplars of a modern and more productive NHS, for example:**

1. NHS and government looking for scalable MSK delivery models (new S&N Ambulatory surgical centre in Dorset)

## **Align with new funding and commissioning models:**

1. Work with ICBs on pilot programmes
2. Integrate with NHS App, virtual triage systems, and MSK primary care pathways



# Thank you

If you have any further questions, please contact  
Paul Blakeley

[paul.blakeley@newmarket-strategy.com](mailto:paul.blakeley@newmarket-strategy.com)

**Newmarket Strategy Ltd**  
179 Great Portland Street  
London | W1W 5PL

[www.newmarket-strategy.com](http://www.newmarket-strategy.com)

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