Customers

NHS Scotland	NHS Health Boards (Scotland) Healthcare provision by 14 geographically-based local NHS Boards & 7 National Special Health Boards	Housing Associations	CUSTOMERS	Insurance Companies - Employ 23,000 people in Scotland (7% of UK total) - **Private Health Insurance, 10%** market	The Life Sciences Industry - **£2.4bn** sector, 41,,000 employees, **7%** growth p.a.

Primary Healthcare — HEALTH AND SOCIAL CARE SCOTLAND — Public Contracts Scotland incl. NHS tenders

NHS 24 | Social Services | Hospitals | NHS (other UK regions) National healthcare provider serving 60 million.

Private Individuals

Local Authorities — Convention of Scottish Local Authorities – COSLA — Scotland Excel: Procurement Local Councils

MARKET ACCESS

ACCESS TO DATA
- eDRIS - national data safe haven service NHS Electronic data
- NHS Scotland Open Data & Statistics
- Usher Institute - Interdisciplinary study of designing, developing, using IT solutions
- Innovation Healthcare Delivery Programme Scotland – linking NHS data to innovation
- Data Lab – Value from data for companies
- iCAIRD – Radiology & Digital Pathology

(Public Health Scotland, Usher Institute, iHDP, THE DATA LAB, iCAIRD)

TRIAL TECHNOLOGY
- NHS Research Scotland (NRS) Supports Clinical Translational Research. Single point of contact for clinical trials. Access to leading clinicians.
- Precision Medicine Scotland (PMS-IC)

(NHS SCOTLAND NHS RESEARCH SCOTLAND, Precision Medicine Scotland.)

> Digital Health & Care Centre conduit between digital health tech & NHS *(Digital Health & Care Innovation Centre)*

TECHNOLOGY ADOPTION
- Small Business Research Initiative (SBRI) - pan-UK funding calls for SMEs to deliver innovation
- Scottish Health Innovations (SHIL)
- Health Innovation Assessment Portal (HIAP) - submit your innovation & have it assessed by NHS Scotland
- Scottish Health Technologies Group (SHTG)
- NHS 24 – Scotland's Telehealth & -care organisation

(NHS 24 TEC, Health Innovation Assessment Portal, Healthcare Improvement Scotland)

INNOVATION CHALLENGES
- DHI – Funding calls
- SBRI – Funding calls for healthcare
- Industrial Strategy Challenge Fund
- SHIL Funding

(Digital Health & Care Innovation Centre, SBRI HEALTHCARE)

DIGITAL HEALTH COMPANY LANDSCAPE - over 280 companies

MOBILE HEALTH
novarum, Talking Medicines, cohesion medical, careBUILDER, NEATEBOX, current, cojengo, Storii CARE, waracle, Safe Shores, TalkingMats, MiME, carezapp, PAL technologies Providing the Evidence, MUSEMANTIK enhancing experience

HEALTH ANALYTICS
Exscientia, Nugensis, aridhia, FUJITSU, workstreme, ORION HEALTH, Craneware, ideagen, Atos, formedix, Synopsis, brightree, stormid, sopra, steric, IBM, Spiritus, Triscribe, CYAN FORENSICS, Holoxica, nooQ, OracleBio, Antibody Analytics

DIGITAL HEALTH SYSTEMS
sitekit, myway, Canon, Blackford analysis, touch bionics BY OSSUR, LBASOFT, DI4D, relaymed, ultrasound manager, viocare, AxSys, voice TECHNOLOGIES, Atos, ajenta, DYSIS, 3M Science. Applied to Life., CLINPAL, InterSystems, GE Healthcare, INTELLIMED, leidos, SYMPHONIC

TELEHEALTHCARE
openbrolly roc, hmedics, PHYSIO WIZARD, BT, egton, MetixMedical, ARMED, tactuum, microtech, Tactical Wireless, current, lumiraDx, ajenta, care sourcer, waire, communicare247

SUPPORTING INDUSTRIES

Product Design
shoredesign, iDE8, 4c°, daysix, i-4, wideblue, bitwise, A2E Embedded Design, PLEXUS, designled

Scottish Tech Sector
- 1,500 tech businesses, £4.5 billion industry
FANDUEL, encompass, ORACLE, Axios SYSTEMS, CISCO, amazon, skyscanner, Atos, Capgemini, pureLiFi, IBM, HUAWEI

Precision Medicine
£9.5 million investment into the Precision Med Innovation Centre
Precision Medicine Scotland., Canon, illumina, lumiraDx, edinburgh genomics, ThermoFisher SCIENTIFIC, aridhia, REPROCELL

Cyber Security
- 220 companies, strong academia
CYBER ACADEMY, cyborn, CYAN FORENSICS, accenture, ADARMA, Atos, BARRIER, YOTI

Specialist Consultancies
bitwise, iDE8, EY, stormid

Imaging
DYSIS, TOSHIBA Leading Innovation, Canon CANON MEDICAL RESEARCH EUROPE LTD., imv imaging, DI4D, optos

Data & AI
- Over 180 companies, using AI
my customer lens, ClinSpec Dx LIQUID BIOPSY FOR CANCER, Think Analytics, RedStar, PHARMATICS, InGAME, Exscientia, sentinel, RASA

Gaming Industry
- Top Gaming location, Abertay Univ. ranked no. 1 in Europe for Gaming
- InGAME is a £11.5m R&D Centre
Abertay University, SCHOOL OF SIMULATION AND VISUALISATION THE GLASGOW SCHOOL OF ART, InGAME, CHILLI CONNECT, deltaDNA

Cloud Computing
ORACLE, cloudsoft, flexiant, IFB, Pulsant Business Unlimited, Castle computer services, iomart hosting

Database / Patient Records
sitekit web excellence, LBASOFT Healthcare Informatics, CAMBRIC SYSTEMS LIMITED

INDUSTRY ENABLERS

INNOVATION CENTRES & UNIVERSITIES
- Digital Health & Care Innovation Centre
- NHS 24 Scotland's Telehealth & -care organisation
- ICAIRD AI Research in Digital Diagnostics
- Precision Medicine Scotland Innovation Centre
- SINAPSE – Scottish Imaging Network
- The Bayes Centre Innovation hub for Data Science & AI
- The Data Lab Access expertise in data
- SICSA Scottish Informatics & Computer Science Alliance
- CENSIS Innovation Centre for Sensor Technology & IoT
- Fintech Scotland Scottish Fintech Ecosystem
- ScotlandIS – Digital Association & Ecosystem
- Usher Institute Population & Public Health Data
- eDris – Electronic Data & Innovation Service
- EPCC – Edinburgh Centre High Performance Comp.
- Scottish Universities – digital health degrees & strong IT expertise
- Interface – connecting companies to academics

(Digital Health & Care Innovation Centre, NHS 24, iCAIRD, Precision Medicine Scotland., SINAPSE, THE DATA LAB, BayesCentre, SICSA, FinTech Scotland, CENSIS Sensing · Imaging · IoT, SCOTLANDIS cyber, SCOTLANDIS data, Public Health Scotland, Usher institute, epcc, Interface, Universities Scotland)

E-HEALTH SOLUTIONS NEEDED IN SCOTLAND
- Digital Health & Care Strategy Scotland - **Integrating Health & Care**
- **NHS Priorities:** Remote Access Diagnostics (e.g. cancer detection), Preventive & Proactive Care, Integrated Unscheduled & Planned Care
- Digital Health & Care Innovation Centre Priorities: Cancer, Cardiovascular, Covid-19, Chronic Respiratory, Citizen Empowerment, Demand & Capacity Management, Diabetes, Digital Skills Training, Healthy Aging, Mental Health

(The Scottish Government, NHS SCOTLAND)

CAPABILITIES	ENABLERS	APPLICATIONS
- Device Design & Manufacture - Genomics - Computer Games Design & Development - Data Science - Information & Communicaton Tech (ICTs)	- Wearables - Electronic Patient Records - App Development	- Digital Health Systems - Assisted Living - Telehealthcare & Monitoring - mHealth - Personalised Medicine

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About Scottish Development International (SDI)

SDI is Scotland's economic, enterprise, innovation and investment agency, assisting Scottish firms with their trade-activities and supporting foreign companies who would like to do business, invest or are looking for collaboration partners in Scotland.

WHY SCOTLAND FOR DIGITAL HEALTH
- ✓ **UK Digital Health Market** forecast to reach $ 28.3 bn by 2025
- ✓ **Ideal test-bed conditions** in remote & rural as well as urban areas
- ✓ **Strong collaborative** triple helix between **the NHS, Industry & Academia** to foster innovation
- ✓ Single **centralised healthcare & telehealth** provider
- ✓ Excellent **digital health records**
- ✓ Expanding cluster of over **280 digital health companies**
- ✓ **Attractive Talent Pool** – Excellent Universities & Innovation Centres (21,000 graduates per year in IT / 41,000 people work in life sciences)
- ✓ Scotland is the **most attractive UK region for foreign direct investment** after London.**

* 4 of the top 200 universities globally are from Scotland - The Times Higher Education Ranking
** EY Scotland Attractiveness Survey 2020

HOW WE SUPPORT COMPANIES
- Advice & access **to R&D grants** and other **financial support** schemes
- Advice on **how to access the NHS** with an innovative digital health product or service
- Access to Scottish **companies, research institutions**, the Scottish **Government**, public agencies and potential **investors**
- **Market & location advice**, how to set up in Scotland

This Map is not intended to provide an exhaustive overview!

Digital Health Map Scotland

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SCOTTISH DEVELOPMENT INTERNATIONAL