ABHI

2026 SCOTTISH PARLIAMENT ELECTIONS: HEALTHTECH'S MANIFESTO

ABOUT ABHI

ABHI is the UK's leading industry association for health technology (HealthTech).

ABHI supports the HealthTech community to save and enhance lives. Members, including both multinationals and small and medium sized enterprises (SMEs), supply devices and diagnostics from syringes and wound dressings to surgical robots and digitally enhanced technologies. We represent the industry to stakeholders, such as the government, NHS and regulators.

HealthTech plays a key role in supporting delivery of healthcare and is a significant contributor to the UK's economic growth. HealthTech is the largest employer in the broader Life Sciences sector, employing 196,000 people in 4,360 companies, with a combined turnover of £48bn. ABHI's 400 members account for approximately 80% of the sector by value.

OUR HEALTHTECH MANIFESTO

NHS Scotland, and the thriving ecosystem of HealthTech companies that support it, are entering a period of significant transformation, guided by the publication of Scotland's Population Health Framework, the Service Renewal Framework, and NHS Scotland's Operational Improvement Plan. Together, these documents set ambitious goals for improving population health and modernising services.

HealthTech has a central role in realising these ambitions, from advancing digital innovation and supporting earlier diagnosis to enabling home-based care that improves outcomes and drives system efficiency. As we move into the first year of these frameworks, this is a pivotal moment to recognise both the structural barriers that continue to limit HealthTech adoption and the clear, demonstrable benefits that follow when innovation is embraced: greater efficiency, long-term savings, and improved health and economic prosperity.

This Manifesto sets out four key recommendations to support the 250 HealthTech companies operating in Scotland. These companies form a critical, innovation-driven sector with global growth potential, and their success is essential to achieving Scotland's health improvement ambitions. By acting on these recommendations, Scotland can strengthen a globally competitive industry while delivering high-quality, cost-effective care for thousands of patients every day.

THE HEALTHTECH OPPORTUNITY

Jacqui Young
Senior Public Affairs Manager, Access & Innovation, Roche Diagnostics and Chair, ABHI Scotland

> "HealthTech innovation is central to delivering Scotland's ambition for a healthier population and a more sustainable health service. By strengthening collaboration between industry, academia and the NHS, we can accelerate research, unlock the power of data, and ensure that cutting-edge technologies reach patients faster. This Manifesto rightly highlights the strategic actions needed to realise these opportunities and secure Scotland's place as a global leader in health innovation.

Prof. David Lowe
Emergency Medicine Consultant NHS GGC, Clinical Director Innovation University of Glasgow

> "The integration of new technologies into everyday clinical practice is essential for improving outcomes and creating capacity within our health system. Scotland's HealthTech sector is already delivering solutions that support earlier diagnosis, remote monitoring and more proactive care. By addressing adoption barriers, as this Manifesto sets out, we can accelerate the benefits for citizens and staff across Scotland.

Michelle Beukes
Business Development Manager, HealthTech, Heriot-Watt University

> "Scotland possesses the talent, research excellence, and industrial base to lead the next wave of HealthTech innovation. With the right policy framework, we can scale breakthrough technologies, attract global investment, and support the NHS to deliver more personalised, efficient and predictive care. The recommendations set out in this Manifesto provide a clear roadmap to turn this potential into reality.

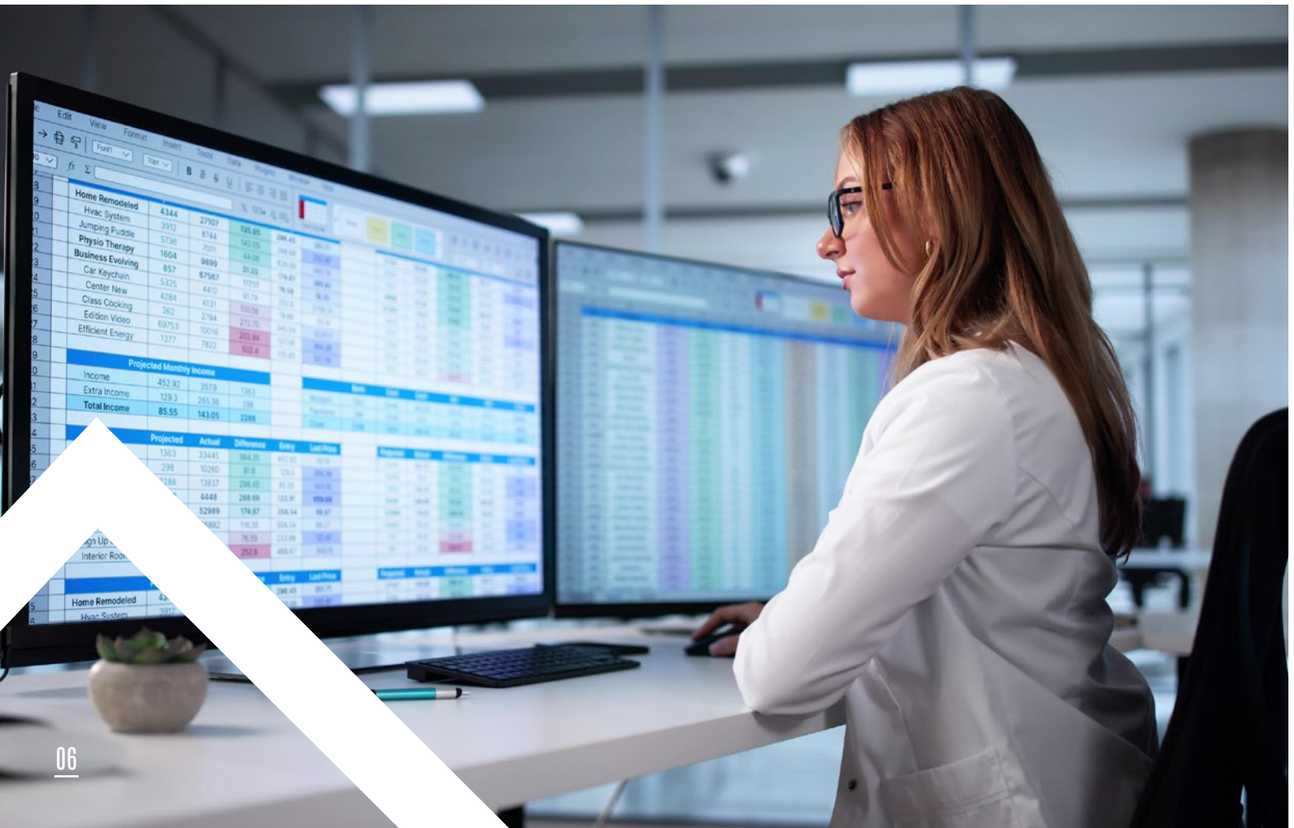
DATA

Scotland's HealthTech industry is supported by 9,000 employees across more than 250 companies, ranging from home-grown SMEs to leading multinationals. The country is also home to world-renowned universities who contribute much to improvements in the NHS. Together, industry, academia, and NHS Scotland generate a significant volume of data. Harnessing this data to produce insights that drive research, innovation, and ultimately improve patient care represents a major opportunity to position Scotland at the forefront of global innovation and adoption.

However, accessing this data remains cumbersome. Datasets are diverse and fragmented, and governance processes vary across organisations. As a result, a valuable national resource is being underutilised. This creates particular challenges for HealthTech companies in Scotland, which, despite a strong desire to work with Scottish data, often find themselves outsourcing data from other countries to progress their research and product development.

#1

ABHI recommends that Scotland enables rapid, federated access to validated, high-quality health data for research and innovation. Doing so will unlock significant economic, societal and health benefits, while strengthening Scotland's position as an international leader in data-driven healthcare.



DIGITAL RESPIRATORY CARE SYSTEM

This technology has not been adopted by NHS Scotland.

What is a Digital Respiratory Care Solution?

Digital respiratory care systems are designed to deliver warmed and humidified respiratory gases to spontaneously breathing patients, supporting those with chronic respiratory conditions in both hospital and home settings. These systems enable healthcare professionals to monitor treatment adherence and efficacy remotely through secure, cloud-based platforms. By combining advanced respiratory therapy with digital connectivity, they promote continuity of care and data-driven clinical management across healthcare settings. This solution is currently being tested in NHS pilots, with promising results seen at NHS Greater Glasgow and Clyde.

How does it support the NHS Scotland Operational Improvement Plan and Service Renewal Framework?

Shifting the Balance of Care

This device is designed for a home care setting providing a clinical management pathway from therapy initiation to care. As it enables safe continuation of therapy in the home environment, the digital respiratory care solution supports earlier discharge and reduces the need for prolonged hospital stays. This shift from hospital to community care lowers pressure on acute services while maintaining clinical oversight through remote monitoring. Patients benefit from increased independence, improved continuity of care, and reduced readmission risk.

Improving access to health and social care services through Digital and Technological Innovation

The secure cloud-based system integrates with existing digital health infrastructure, such as Electronic Health Records (EHRs) and patient management platforms. It provides real-time data on therapy adherence and patient-reported outcomes, allowing clinicians to make informed decisions remotely. This digital approach supports NHS Scotland's vision of technology-enabled care and aligns with its national digital health and care strategy.

Working with people to prevent illness and more proactively meet their needs

By enabling healthcare professionals to identify early signs of deterioration, non-adherence, or treatment inefficacy, digital respiratory solutions support proactive intervention. Recent studies have shown this early response helps prevent exacerbations, reduces hospitalisations, and improves long-term disease management—particularly for patients with chronic respiratory conditions such as COPD. In doing so, it contributes to improved population health and prevention of disease progression.

Potential Financial Impact on the NHS

Digital respiratory care solutions have demonstrated the potential to reduce healthcare costs by lowering hospital readmissions and exacerbation rates in chronic respiratory patients. Studies indicate that preventing even a small number of COPD exacerbations can yield significant savings, given the high cost associated with frequent hospital admissions. Additionally, by enabling earlier discharge and reducing time spent in acute settings, these solutions can help alleviate hospital capacity pressures and optimise resource utilisation.

Barriers to Adoption

Barriers to adoption include the current lack of formal clinical pathways for home-based high-flow therapy and the reimbursement framework. Establishing clear clinical guidance, data governance models, and integration standards for remote monitoring is essential. Furthermore, continued evidence generation, particularly real-world data and patient-reported outcomes, will be crucial in demonstrating long-term clinical and economic benefits to support widespread adoption across NHS Scotland.

FINANCE

Outside of the Accelerated National Innovation Adoption (ANIA) pathway, decision makers are driven by short-term cost savings. Budgeting restrictions and immediate cost saving targets limit the ability for innovation to be appropriately valued, even when investing in innovative products would save resources in the longer-term. Successful procurement is often measured on savings in comparison to previous years, rather than accounting for the full value an innovation can bring.

A mechanism should be developed to allow the adoption of innovation with transitional finance relief over multiple years to allow for benefits to be realised while systems move to new technologies. The current system is, at a Health Board level, systemically resistant to innovation on cost grounds, despite the benefits that could be achieved for patients and the Scottish economy. Despite the frameworks outlining some ambition to align finance with service needs and rebalance budgeting to support the framework's intent, there is need for increased funding in the short-term to allow for the plans ambitions to be realised.

#2

ABHI recommends extending cash-releasing savings targets from one to five years, recognising the upfront investment often required to implement HealthTech solutions. A mechanism that accounts for the longer-term cost-saving potential of innovative products will deliver benefits for patients and strengthen the Scottish economy.

AUTOMATED MEDICATION DISPENSING AND MANAGEMENT SYSTEM

This technology has been adopted by NHS Scotland.

What is a Medication Management System?

Automated medication dispensing cabinets digitise and streamline medication management in hospitals by securely storing, tracking and dispensing medicines at ward level. Integrated with electronic prescribing and patient records, the technology guides nurses to the correct medication, dose, and timing, reducing errors and improving patient safety. It automates inventory tracking, ensures timely restocking, and enhances visibility of stock across the hospital. By digitising and connecting the medication administration process, this system can free up clinical staff from manual tasks, allowing more time for patient care. It also supports compliance, traceability, and efficient use of resources, contributing to safer, smarter, and more cost-effective healthcare delivery.

How does it support the NHS Scotland Operational Improvement Plan and Service Renewal Framework?

Shifting the Balance of Care

Reduction in medication errors and missed critical doses helps reducing the length of stay in hospital, enabling quicker transfer to community. By integrating with electronic prescribing and patient records (HEPMA), it facilitates continuity of care and supports remote and community-based services.

Access to health and social care services through Digital and Technological Innovation

By digitising medication storage, dispensing, and tracking, this system represents a key enabler of digital transformation in healthcare. It integrates seamlessly with prescribing and patient record systems to provide real-time visibility of medicines across sites. This connectivity enhances safety, reduces wait times, and reduces administrative burden on staff.

Working with people to prevent illness and more proactively meet their needs

Reduction in medication errors and missed critical doses reduces the risk of adverse events occurring and complicating existing diseases further. For example, taking a medicine at the wrong time may reduce its efficacy and taking subsequent doses too close together may increase the risk of side effects. Delayed or omitted doses are particularly challenging with a number of diseases including Parkinson's Disease. This medication management system reduces avoidable harm, prevents deterioration, and supports better clinical outcomes.

Potential Financial Impact on the NHS

While it is difficult to gather insight into the value of medication that is consumed in Scottish Acute Hospital, spending on medicines constitutes 13.1% of the overall health budget totalling £1.76bn, representing one of the NHS's largest areas of expenditure. Automated medication dispensing can reduce medicines wastage and improve inventory management, allowing wards to store 20% less medication.

By automating routine tasks, this system also frees up clinical staff for higher-value tasks and boosts workforce efficiency, potentially saving the equivalent of hundreds of full-time pharmacy and nursing roles. An example of financial and non-financial savings can be seen in this brief case study that highlights the financial impact at a single ward in an Acute NHS Hospital. Scaling this up across Scottish hospitals could revolutionise patient safety, workforce efficiency, supported by strong cashable benefits and return on investment.

Barriers to Adoption

This technology has been adopted by NHS Scotland, demonstrating a win-win situation for patients and the NHS. However, there are still barriers to scaling up the adoption of medication management technologies in Scotland including limited capital funding, fragmented implementation, slow scaling of success, perceived regulatory complexity (especially around controlled drugs), and workforce shortages to implement e.g. IT.

There was a forum established, Automating for Better Care (A4BC), to advise on the adoption and use of automation technology in the medication pathway. The forum is looking at whether data can support the strategic case for deployment of automated medication technology.

ADOPTION

Currently, individual Health Boards assess business cases independently (unless the innovation is part of ANIA), a process that consumes significant time and resources and delays the availability of new technologies across Scotland. Introducing a once-only approach, either at Health Board level or within a future tier of the ANIA programme, whereby HealthTech approved for use in one area becomes automatically available to others, would streamline decision-making, accelerate adoption, and ensure that patient and system benefits are realised far more quickly.

Currently the Scottish model of adoption mirrors the English one, where the NHS operates at a local or regional level. An approach which involves automatic reciprocal approval in Scotland, where a product adopted in one Health Board can be immediately disseminated in others would save industry the considerable time and resource that is put into writing multiple business cases for individual Boards, as wel as benefitting patients through making innovative technology more accessible sooner.

Additionally, although we highly commend ANIA and its success to date, it favours transformational innovation, but the reality in the HealthTech sector is that innovation is a long-term iterative process. A shift in mindset is required to adapt to the needs of the technology adoption.

#3

ABHI recommends a 'Once for Scotland Approach' with a single pathway for the assessment of innovation could introduce new technology to the wider health system much faster. Furthermore, we propose a dedicated section of ANIA to consider iterative innovation. Iterative innovations could deliver enhanced productivity and efficiency as well as cost savings.

ANTIBACTERIAL SUTURE TECHNOLOGY

This technology has been adopted by NHS Scotland.

What is Antibacterial Suture Technology?

Antibacterial sutures are synthetic absorbable sutures coated or impregnated with an antimicrobial agent to inhibit bacterial colonisation at the surgical site. Designed to reduce the risk of surgical site infections (SSIs), these sutures support faster recovery, reduced postoperative complications, and improved patient outcomes. Evidence from multiple studies and health technology assessments indicates that antimicrobial sutures significantly reduce the incidence of SSIs compared with standard sutures, contributing to safer and more cost-effective surgical care across health systems.

How does it support the NHS Scotland Operational Improvement Plan and Service Renewal Framework?

Shifting the Balance of Care

By helping to prevent surgical site infections, antibacterial sutures reduce complications that often lead to extended hospital stays, readmissions, and delayed recovery. This frees up hospital capacity and supports faster discharge. Reducing infection-related complications supports NHS Scotland's ambition to improve patient flow, reduce bed pressures, and enhance continuity of care post-surgery.

Access to Health Services through Digital and Technological Innovation

When combined with bespoke surgical site digital surveillance tools and outcome monitoring platforms, antibacterial suture use can be tracked as part of a comprehensive surgical quality improvement strategy. Such systems can capture real-time SSI data, reduce face-to-face follow-up hospital appointments, and measure the effectiveness of infection prevention interventions. Digital integration enables better decision-making, significant cost savings, and data-driven infection control management aligned with NHS Scotland's digital health ambitions.

Working with people to prevent illness and more proactively meet their needs

As an infection-prevention technology, antibacterial sutures directly address a key driver of hospital-acquired infection. By reducing SSI risk by nearly 30%, these sutures reduce morbidity and extended hospital stays associated with SSIs. Along with the rise in antibacterial resistance (which may make SSIs more difficult to treat) – this makes avoidance a key priority.

Potential Financial Impact for NHS Scotland

Economic modelling has demonstrated that antibacterial sutures are cost-saving compared with standard sutures due to their impact on reducing SSIs. NICE estimates the average cost of treating an SSI to be £6,016. Cost modelling (NICE) shows that antibacterial sutures is cost saving compared with standard sutures by an average of £13.62 per patient, from reduced surgical site infections. To give context, for every 10,000 patients treated with antibacterial sutures, a saving of £136,200 could be achieved. Reducing infection-related readmissions and length of stay also enhances theatre efficiency and resource utilisation, supporting NHS Scotland's financial sustainability goals.

Barriers to Adoption

The cost of these antibacterial sutures is approx. 30% greater than standard sutures. However, these sutures have been adopted due to best practice and the additional cost demonstrated to be outweighed by the cost saving generated by reducing SSI. This adoption was also supported by growing clinical evidence, national guidance, and inclusion in infection-prevention bundles. Integration with digital surveillance systems can further strengthen the evidence base and demonstrate cost-effectiveness in real-world NHS settings.

Additional Considerations

By helping prevent SSIs, it also contributes to environmental and sustainability objectives through reduced use of antibiotics, lower waste generation from additional procedures, and decreased hospital energy consumption due to shorter patient stays. This innovation demonstrates how small-scale surgical technology changes can yield large-scale benefits for resource efficiency and sustainable healthcare delivery.

MEDICATION FLUSH ADMINISTRATION SET

This technology has not been adopted by NHS Scotland.

What is a Medication Flush Administration Set?

A Medication Flush Administration Set is an infusion set designed to ensure that patients receive the full prescribed dose of intravenous medication. Traditional infusion lines can retain up to 40% of a drug's prescribed dose after administration, leading to underdosing and reduced therapeutic effect. This device integrates air-stop technology and a needle-free injection port that allows a controlled post-infusion flush, ensuring that the full volume of medication is delivered to the patient. It improves dosing accuracy, clinical outcomes, and supports best practice.

How does it support the NHS Scotland Operational Improvement Plan and Service Renewal Framework?

Shifting the Balance of Care

The Medication Flush Administration Set can be used safely in both acute and community care, particularly within Outpatient parenteral antimicrobial therapy (OPAT) services—a strategic focus for NHS Scotland. Evidence from a large London Trust across multiple ITU departments indicates that full-dose administration contributes to shorter hospital stays and reduced readmissions for patients initially presenting with sepsis, allowing care to be moved into the community quicker.

Working with people to prevent illness and more proactively meet their needs

Accurate dosing of antibiotics is essential for preventing antimicrobial resistance (AMR), a global public health issue. Administering antibiotics at subtherapeutic levels may be a significant contributor to the development of resistant strains. Therefore, this administration method set reduces this risk, contributing to long-term infection prevention and public health protection that directly aligns with NHS Scotland's Antimicrobial Stewardship Strategy.

Potential Financial Impact for NHS Scotland

The introduction of this medication administration method can have a number of financial benefits from a value based procurement perspective. Evidence from a UK Trust identified a £60,000 per annum saving on antibiotic usage, 53% reduction in administration set usage and 312kg reduction in single use plastic wastage. Furthermore, post medication flush can support a timelier switch from IV to oral antibiotics, therefore further reducing medical device costs, consumable waste, length of stay and creates nursing efficiencies, all of which offer environmental and financial benefits.

Barriers to Adoption

The main barrier preventing adoption is the upfront cost investment in order to implement the technology. This technology is typically more costly compared to alternatives currently used by most Health Boards. However, although initial investment is required, the evidence provided indicates that there a longer term, value-based benefits and savings that should be considered.

Furthermore, a study commissioned by Baroness Bennett of Manor Castle in November 2023 found that despite Scotland leading the way in having a line flushing policy, compliance with these policies at a NHS Health Board level is inconsistent, with few achieving compliance supported by audit data with their policy. Widening access to the appropriate technology would support policy alignment, facilitate best practice, and accelerate progress toward value-based care.

EXPORT AND GROWTH

Scotland's HealthTech sector has significant potential for global growth. With more than 250 companies, including a strong base of innovative SMEs, the country is well positioned to compete internationally. However, companies frequently cite barriers that prevent them from scaling at pace, including difficulty accessing key global markets, high regulatory and market-entry costs and limited support for international commercialisation.

A strong export environment is essential to attracting inward investment, promoting innovation and enabling Scottish companies to scale. Whilst Scotland benefits from world-class research, clinical excellence and a trusted global reputation, too many HealthTech businesses struggle to translate local adoption into success in international markets. This constrains competitiveness and limits Scotland's ability to secure a greater share of global Life Sciences growth.

ABHI is committed to supporting the growth of Scotland's HealthTech industry in international markets. Building on our strong partnerships with Scottish Development International and Scottish Enterprise, we are keen to continue helping Scottish HealthTech companies access, compete in and form meaningful partnerships across some of the world's largest and most dynamic healthcare markets. By leveraging ABHI's global networks, international programmes and UK Pavilion platforms, we can accelerate export ambitions, strengthen Scotland's international presence and ensure Scottish innovation reaches patients worldwide.

#4

ABHI recommends enhanced, sector-specific export support to help Scotland's HealthTech innovators enter and grow in priority global markets. This support should build on existing programmes, avoid duplication, and ensure that promising Scottish SMEs receive the targeted backing they need to scale internationally.

CASE STUDY: THE MIDDLE EAST ACCELERATOR

Scottish Enterprise Funding Four Scottish Businesses On The ABHI Middle East Accelerator
This case study highlights ABHI's strategic role in advancing UK HealthTech at home and abroad, showing how collaborative initiatives and targeted programmes help UK businesses access global opportunities, drive innovation, and strengthen the UK's leadership in HealthTech.

ABHI International & The Middle East Accelerator
A core part of ABHI's mission is creating a positive global environment for UK HealthTech. Through UK Pavilions and dedicated accelerator programmes, ABHI International showcases UK innovation and strengthens international partnerships.

Growing demand from UK companies for support in the GCC, particularly around our UK Pavilions at the Global Health Exhibition in Saudi Arabia and the World Health Expo Dubai (formerly Arab Health), led to the launch of the Middle East Accelerator in April 2025. This 12-month programme supports market access in Saudi Arabia and the UAE.

It offers a structured introduction to both markets, including three trade missions, a UK-based event, and participation in the region's two flagship shows, alongside a learning series, tailored support from the ABHI team, and access to our network of regional experts.

Support for Scottish Business Growth in The Middle East
In 2025, Scottish Enterprise provided targeted funding for Scottish businesses participating in the ABHI Middle East Accelerator. Eligible SMEs received targeted support for travel, accommodation, and participation fees for trade missions to Saudi Arabia and the UAE. This support has enabled companies to meet key regional stakeholders, showcase their HealthTech solutions at major international exhibitions, and build strong commercial relationships with prospective customers.

By reducing the financial barriers, Scottish Enterprise has empowered Scottish companies to accelerate market entry and establish a sustainable presence in the fast-growing Middle East healthcare sector. This backing has been instrumental in helping businesses maximise the opportunities of the programme, engage in high-impact networking, and benefit from ABHI's comprehensive support and expert guidance throughout the accelerator journey.

"We were there to listen and learn about the system, but we were blow away by the trip. All the meetings had value, and it was great to start building a relationship with Ascend as we would like to be able to access and contribute to their dashboards of national health data."

Sarah Marsh, COO, Infix Support
(Glasgow based HealthTech business and ABHI Middle East Accelerator member)

The Case for Ongoing Support
Given the positive impact of Scottish Enterprise's targeted funding for Scottish businesses participating in the ABHI Middle East Accelerator Programme, it is strongly recommended that this support continues in future years. Sustained and, where possible, expanded investment in market access initiatives will further strengthen Scotland's international reputation for HealthTech innovation and entrepreneurship. Ongoing funding will not only enable more businesses to seize global opportunities but also drive sustainable economic growth and help ensure Scottish companies remain competitive on the world stage.

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