



What our client wanted

Yorkshire Forward saw the economic development potential through the uptake of telehealth as a means to meet increasing demand for healthcare services. Frontline, in partnership with Shared Intelligence, was commissioned to review the proposed 'Connecting Health' e-health programme for Yorkshire and to carry out an economic impact assessment.

What Frontline did

The Connected Health programme sought to capitalise on the range of telehealth suppliers in Yorkshire, enabling the region to be a 'first mover' in the UK telehealth market by adopting new approaches to commissioning and procurement for this innovative technology. The aim also was to support the development of a cluster built around this innovative service provision and manufacturing. Our review of this proposal comprised:

- assessment of the context for telehealth, understanding the management of long term conditions the e-health market and telehealth in the UK
- extensive stakeholder consultation to validate the Connected Health concept, covering experience of the Whole System Demonstrators across England, buyers of telehealth services in technology, and equipment manufacturers

This insight enabled us to assess the economic impact on the basis of potential supply and demand in the future UK context for telehealth. We developed growth scenarios, estimating gross added value, employment impacts and value for money.

What difference we made

Our findings showed a significantly under-developed market, though with significant upside potential, major barriers of growth that would require a rebalancing of government policy, and a tipping point some way in the future. However, our robust analysis of economic impact showed that the forecast net economic impacts of the medium and high growth scenarios would be modest. This was in line with Department of Health macro funding projections, leading Yorkshire Forward to take forward Connecting Health to the next stage of concept development.