



UK Government

LIFE SCIENCES SECTOR PLAN

Year One Update

Contents

Secretary of State Foreword	4
The Objectives and Targets	6
Supporting a UK wide Life Sciences Sector	10
Enabling World Class R&D	17
Making the UK an outstanding place in which to start, grow, scale and invest	21
Driving Health Innovation and NHS Reform	28
What comes next	36
Annex – Action by Action Delivery Updates	37

Secretary of State Foreword



**Rt Hon Liz Kendall MP,
Secretary of State for Science,
Innovation and Technology**



**Rt Hon James Murray MP,
Secretary of State for Health
and Social Care**



**Rt Hon Peter Kyle MP,
Secretary of State for Business
and Trade**

The UK's life sciences sector is one of our greatest national assets. It is a sector that not only saves lives, but creates jobs, drives investment and powers innovation across our economy. From world-leading research institutions to dynamic start-ups and global pharmaceutical firms, our ecosystem is rich with potential.

Last year, we set out how we would unlock that potential. The Life Sciences Sector Plan was developed hand in hand with the NHS 10 Year Health Plan and our wider Industrial Strategy, bringing together our ambitions for economic growth and better health outcomes. It is a plan rooted in partnership and driven by a clear commitment to deliver.

The Life Sciences Sector Plan set out a clear ambition: to make the United Kingdom the leading life sciences economy in Europe by 2030, and the third strongest globally by 2035.

One year on, our focus on delivering this bold ambition is yielding tangible results.

There are clear signs of momentum:

- We have secured over £3 billion of investment since publication of the Plan,¹ including through targeted interventions such as the Life Sciences Innovative Manufacturing Fund, which is unlocking significant private investment while creating and safeguarding high-skilled jobs across the UK.
- Clinical trial set-up times have fallen from 169 days to 122 days,² accelerating the pace of research and helping to bring innovative treatments to patients faster.
- We are strengthening the UK's global competitiveness and improving the commercial environment for innovation, including delivering on

our commitment to double spending on innovative medicines as a proportion of GDP, from 0.3% to 0.6% over the next 10 years.³ This will support faster access to cutting edge treatments for patients, including for cancer and other life limiting conditions, while signalling clearly to global investors that the UK is a serious, long-term partner for the life sciences industry.

- We are taking a more strategic approach to landing globally mobile investment, which plays a key role in anchoring supply chains and driving wider sector growth, through the Life Sciences Large Investment Portfolio.
- An aligned pathway is now in place across NICE and MHRA, enabling same time decisions and bringing some treatments to patients up to three to six months sooner.⁴
- We have launched the National HealthTech Access Programme (NHAP),⁵ enabling people across England and Wales to receive faster, fairer access to innovative HealthTech. Alongside this we have published the Value Based Procurement standard guidance to help the NHS assess the wider value when buying medical technology, not just purchase price.⁶

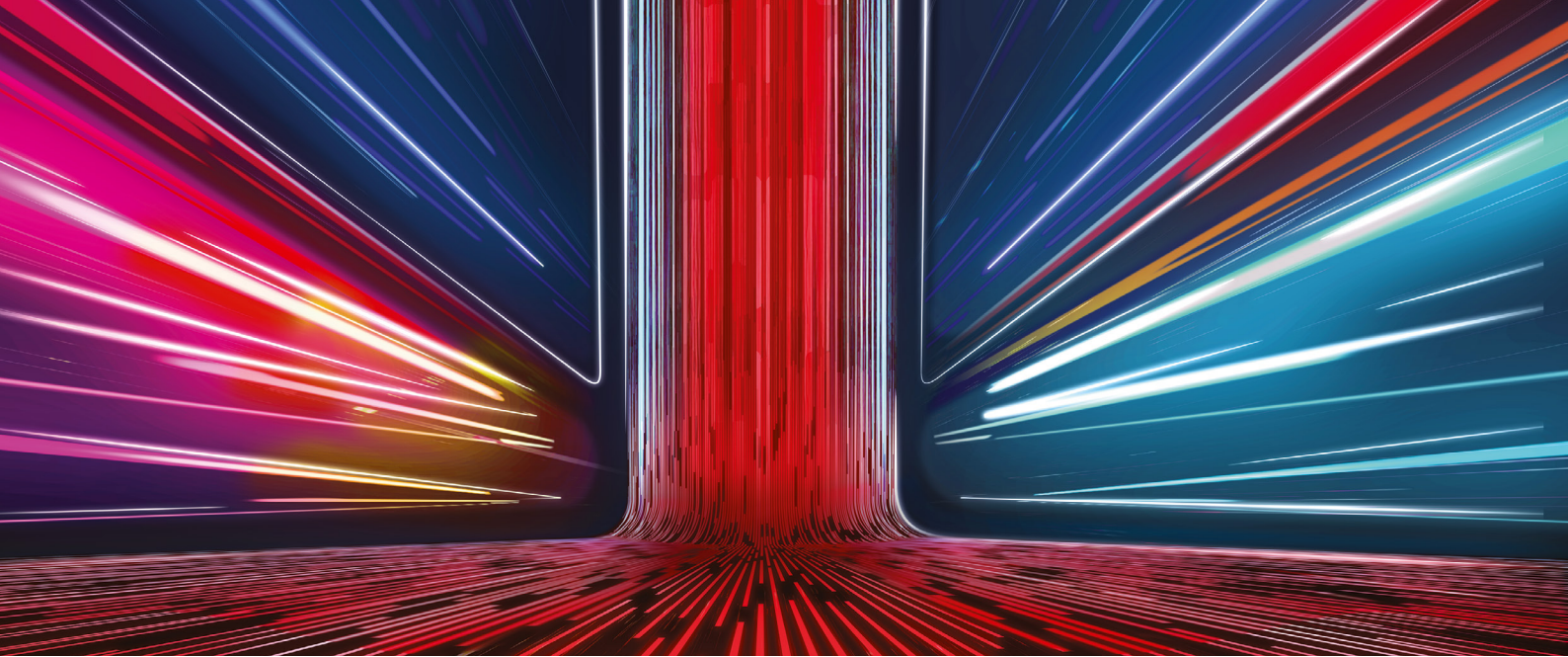
We are also deepening our partnerships with industry to accelerate innovation and deliver tangible benefits for patients. This includes our collaboration with Lilly on the £85 million Obesity Pathway Innovation Programme,⁷ and the Respiratory Transformation Partnership with AstraZeneca, Chiesi, GSK and Sanofi, demonstrating how coordinated action across industry and the NHS can test new models of care, improve access to treatment and support better health outcomes.⁸

We have done this in a challenging global environment. Competition for investment has intensified, and pressures across supply chains and trade continue to shape the operating environment for businesses. In this context, we have worked closely with industry to provide stability, back innovation and support growth, including by strengthening our international partnerships and supporting improved market access for UK life sciences exports.

This report marks an important milestone. It provides a transparent account of progress in the first year of the Plan, setting out where we are delivering, where we must go further, and how we will build on this momentum in the year ahead. It reflects our commitment to openness and to working in genuine partnership with industry, the NHS and academia.

There is much to be proud of. But this is a long-term programme of change. If we are to achieve our ambition of becoming the leading life sciences economy in Europe by 2030, and one of the leading global centres for life sciences by 2035, we must accelerate delivery and deepen our impact.

We remain committed to removing the barriers that hold the sector back, strengthening the conditions for investment, and ensuring innovation is translated into tangible benefits for patients and the public. Together, we will continue to deliver a life sciences system that works faster, more effectively, and more consistently for patients the public and the economy.



The Objectives and Targets

The Plan is built around four headline targets that define our long-term ambition. Delivery against these targets is driven by 33 specific actions, organised across three pillars. Of these, six actions have been identified as headline priorities, reflecting areas where early progress is most critical to the Plan's success.

This update delivers on the Plan's commitment to transparent reporting, providing an evidence-based assessment of progress against its headline objectives and targets, and establishing a clear baseline for tracking future progress using the latest available data.

As data underpinning these targets is published with a time lag, a baseline was not available when the Life Sciences Sector Plan was published. This update therefore draws on the latest available data to provide a clear and consistent baseline from which progress will be tracked over time. Progress against all 33 actions one year on, including the headline six, is set out in the annex.

The Plan set out a long-term ambition for the UK to become the leading life sciences economy in Europe by 2030 and the third strongest globally by 2035. To support this, four headline targets were established.

Life Sciences Sector Plan - Targets at a glance

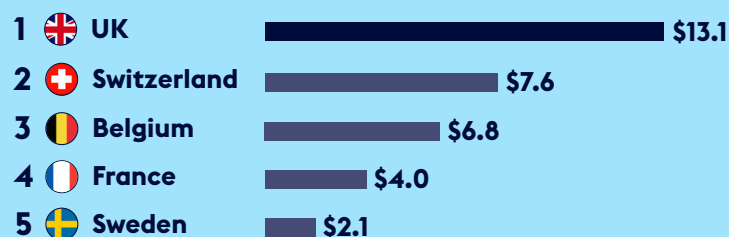
1

INVESTMENT IN COMMERCIAL R&D

Commercial pharmaceutical R&D, \$ billions PPP converted, 2023

Target - By 2030, the UK will have higher investment in commercial R&D than any other European economy, and by 2035 more than any country globally, excluding the US and China.

European Comparators, billions USD PP converted, 2023 or latest year available



Strong underlying performance and a leading position in Europe

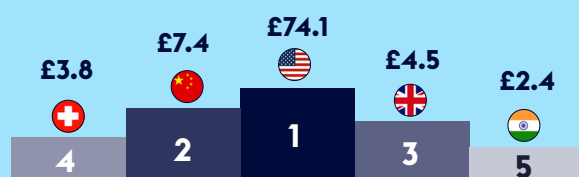
2

ACCESS TO SCALE-UP CAPITAL

Life sciences equity finance raised, £ billions, 2024

Target - By 2030, UK life sciences businesses will raise more scale-up finance than anywhere else in Europe, and by 2035 more than any country globally, excluding the US and China.

Global Comparators, billions (2024)



Strong performance in a competitive and volatile global market
Top in Europe, 3rd globally

3

PATIENT ACCESS

Median time to availability for medicines, days, 2021-2024

Target - By 2030, the UK will be among the top three fastest in Europe for patient access to medicines and medical technologies.

European Comparators, days (2021-2024)



Mid-range in Europe, with further progress needed to reach top three.

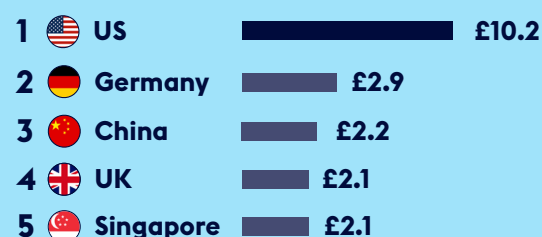
Medicines only: limited data available for medical technologies.

4

FOREIGN DIRECT INVESTMENT (FDI)

Life sciences inward FDI, capital expenditure £ billions, 2024

Target - By 2030, the UK will secure more life sciences FDI than any other European economy, and by 2035 more than any country globally, excluding the US and China.



Strong and competitive position in a globally contested market

1. Investment in commercial R&D

What we said in the Plan

The UK will have more investment in commercial R&D than any other European economy by 2030, and more than any country globally, excluding the United States and China, by 2035.

Baseline Position

The UK ranks first in Europe for pharmaceutical R&D investment,⁹ according to the most recent data, reflecting a strong underlying position at the start of the Plan period. Maintaining this position will require sustained investment in an increasingly competitive global landscape.

2. Access to scale-up capital

What we said in the Plan

More scale-up finance will be raised by UK life sciences businesses than anywhere else in Europe by 2030, and more than any country globally, excluding the United States and China, by 2035.

Baseline Position

The UK raised the highest level of life sciences equity finance in Europe and ranked third globally in the most recent data.¹⁰ Equity financing covers many stages of investment including early stage, venture, growth and mature funding, Initial Public Offerings (IPOs) and follow-on rounds. This reflects continued strength in attracting investment, within a market that remains subject to volatility and wider economic conditions.

3. Patient access

What we said in the Plan

By 2030, the UK will be one of the top three fastest places in Europe for patient access to medicines and medical technologies.

Baseline Position

Whilst England and Scotland rank within the top ten in Europe for speed of access to medicines, we were outside the top three in the most recent data.¹¹ This highlighted the need for targeted action through the Life Sciences Sector Plan to accelerate access and improve performance relative to European peers.

4. Foreign direct investment

What we said in the Plan

The UK will secure more life sciences Foreign Direct Investment (FDI) than any other European economy by 2030, and more than any country globally, excluding the United States and China, by 2035.

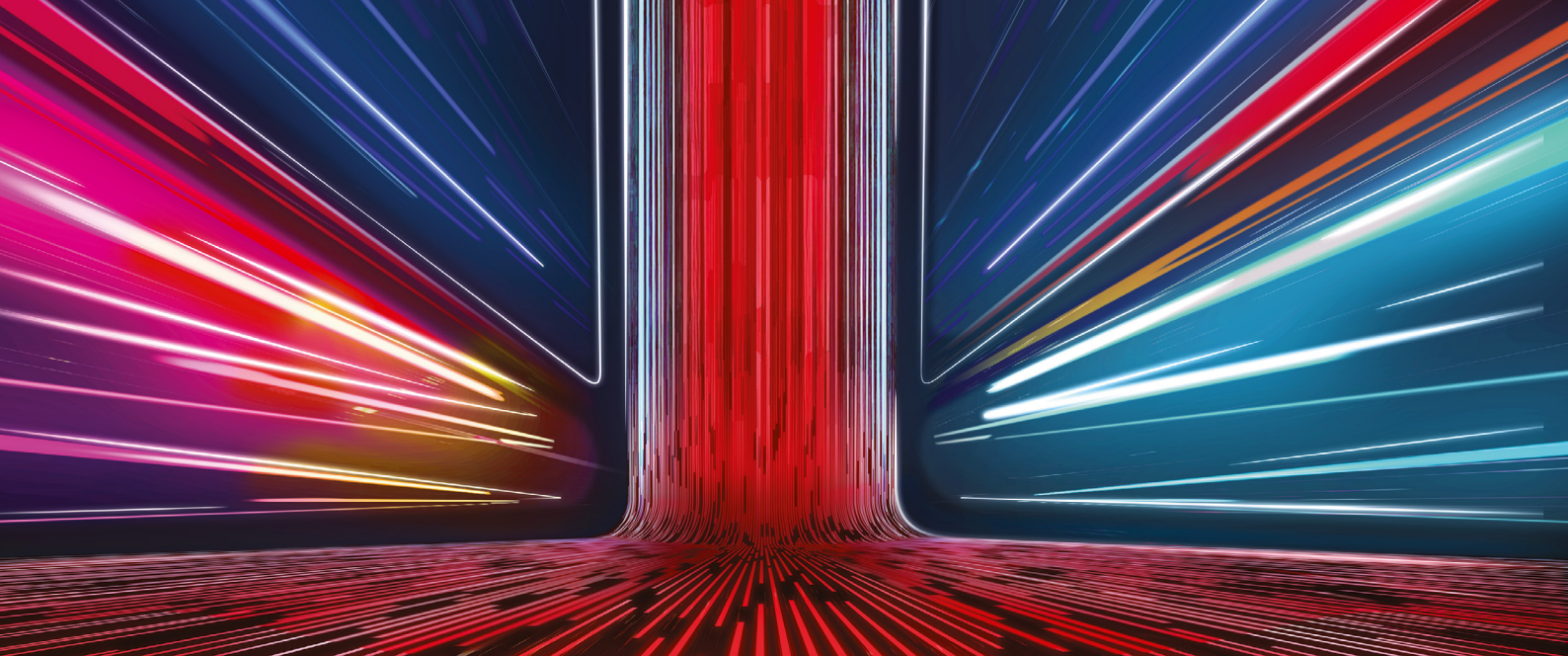
Baseline Position

The UK ranks second in Europe and fourth globally for life sciences FDI,¹² reflecting a strong and competitive position in a globally contested market.

Overall assessment of the UK's baseline

There is a strong base to build upon, with the UK performing well in key areas such as investment and access to capital. At the same time, the baseline highlights areas where further progress will be required to deliver the full ambition of the Plan, particularly in improving the speed and consistency of patient access.

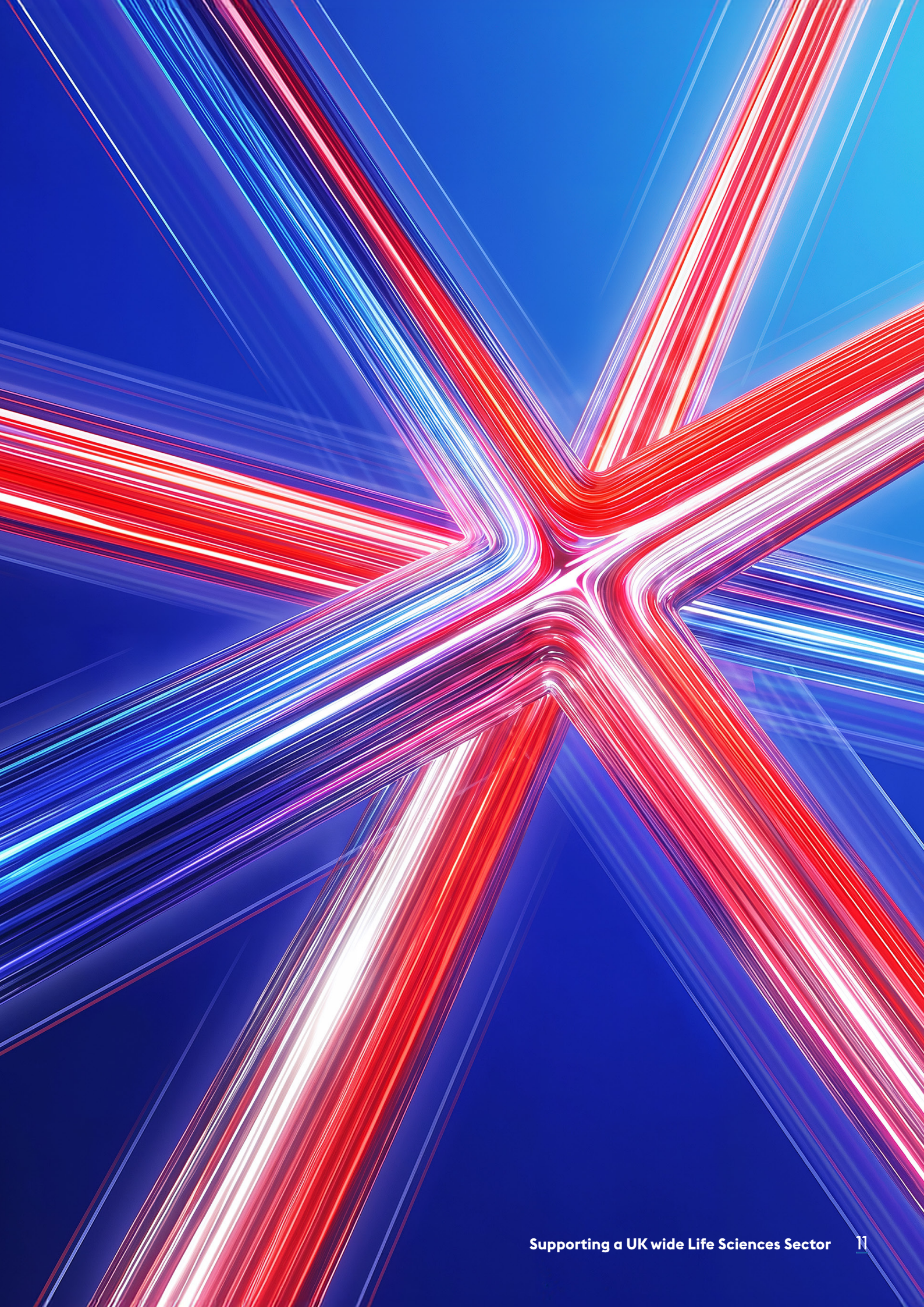
While the UK performs strongly in Europe, the global landscape remains highly competitive, with the US securing notably higher FDI and equity finance compared to all competitors.¹³ There is also a large gap between the US and the UK in life sciences venture capital funding, the US raised 1.5 times more venture capital than the UK on a relative basis between 2022 and 2024.¹⁴ The Life Sciences Sector Plan is designed to support sustained delivery over the coming years to help close this gap, but sustained focus and accelerated progress will be required if the UK is to compete with leading global markets.



Supporting a UK wide Life Sciences Sector

Growing the sector across the UK is central to this Plan. Over the past year, we have strengthened the structures through which government engages with the nations and regions on life sciences, ensuring that the benefits of growth are felt UK-wide.

Through the Devolved Governments-OLS Hub, we are working in close partnership with Scotland, Wales and Northern Ireland to coordinate delivery, share intelligence and align our collective ambitions for the sector. In England, a newly established Mayoral Strategic Authority Life Sciences Network now provides a structured forum for OLS and strategic authorities to identify investable propositions, align local growth plans with national priorities and build a stronger, more coherent offer to global investors. We are also taking a more strategic approach to landing globally mobile investment through the Life Sciences Large Investment Portfolio. This adopts a Place First approach, working with regions to develop tailored support packages that reflect existing local strengths and attract investment where it can have the greatest impact.



Since publication of the Life Sciences Sector Plan in July 2025, the UK has secured over £3billion in investment



£85m Obesity Pathway Innovation Programme supporting new models of care.

📍 **Locations:** Kent, Norfolk and Suffolk, Leicester, Coventry, Birmingham, Dorset, Lincolnshire, Northern Ireland, Wales, Lanarkshire, Midlothian, South London



Convatec announced a **£500 million** investment in a new R&D hub in Manchester.



Moderna has opened its new Innovation Centre in Harwell, with over **£1 billion** being invested in UK R&D through a ten-year strategic partnership.



Norgine investing over **£20 million** to expand its Hengoed Wales site.

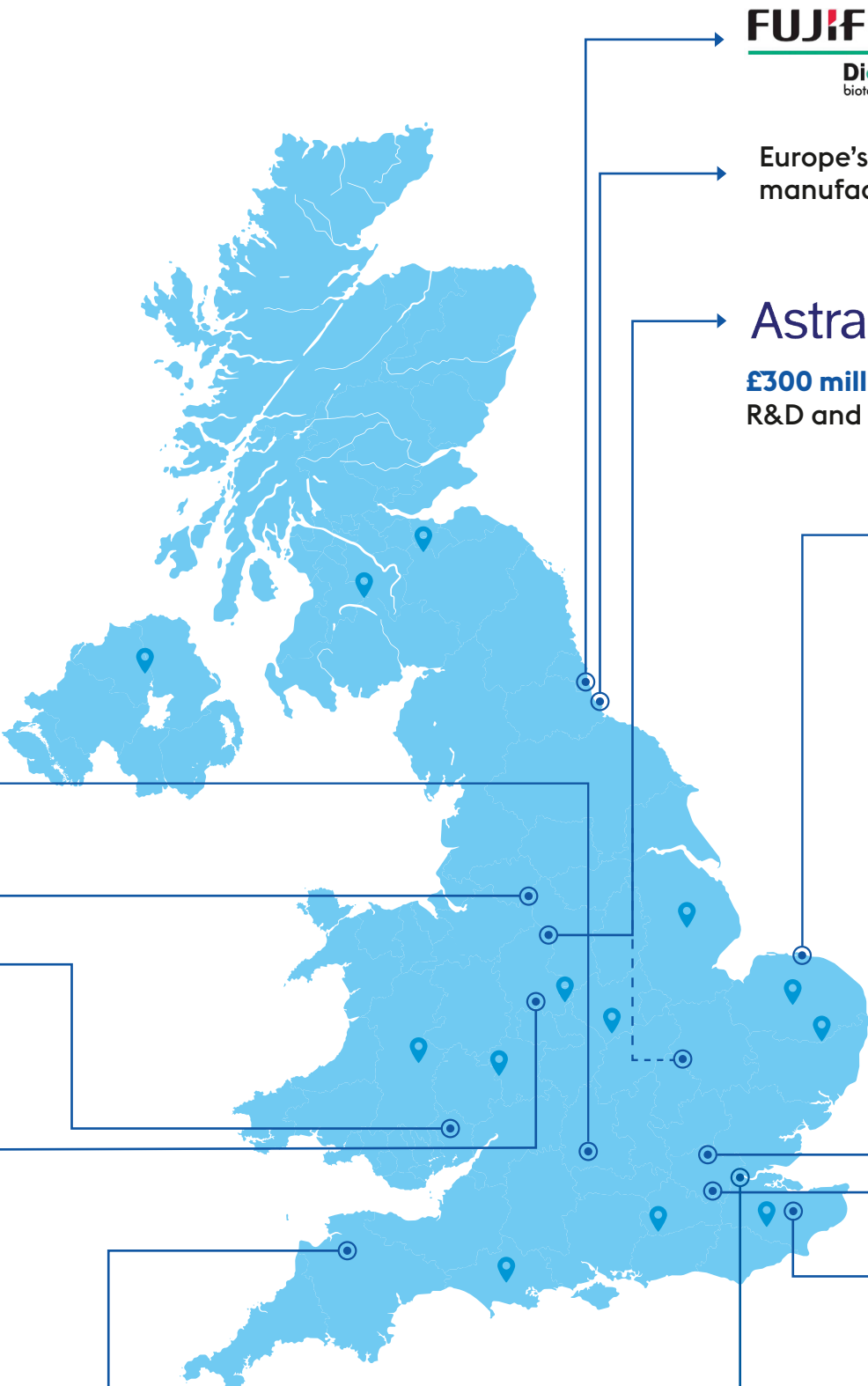


Precision Health Technologies Accelerator

£10m investment by PHTA to establish a near-patient biomanufacturing facility with clean rooms to support medicines, vaccines and clinical trials.



£45m investment by Accord in its Barnstaple, Devon site.





Fujifilm Biotechnologies opening its **£400m** expanded Billingham site.

Europe's first dedicated Biofoundry for mRNA manufacturing established with over **£29m** of funding.



£300 million investment in Cambridge and Macclesfield to expand R&D and establish a new digital drug development laboratory.



Codis investing in a new facility using advanced spray-drying technology for next-generation therapies.



Boehringer Ingelheim's **£150m** AI/machine learning centre in Kings Cross



Orchard Therapeutics investing **£11m** in gene therapy R&D.



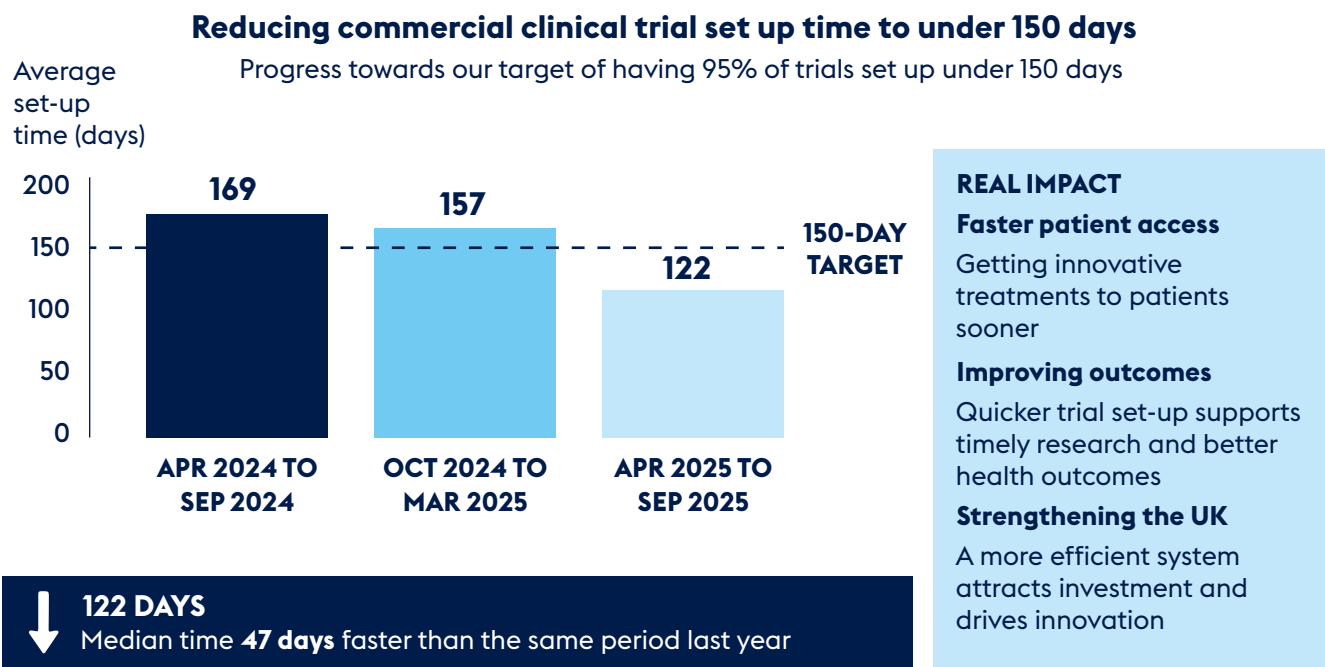
UCB committing **£500m** investment for a research hub in Surrey.



Eisai investing **£48m** to expand their advanced manufacturing capabilities in Hatfield.

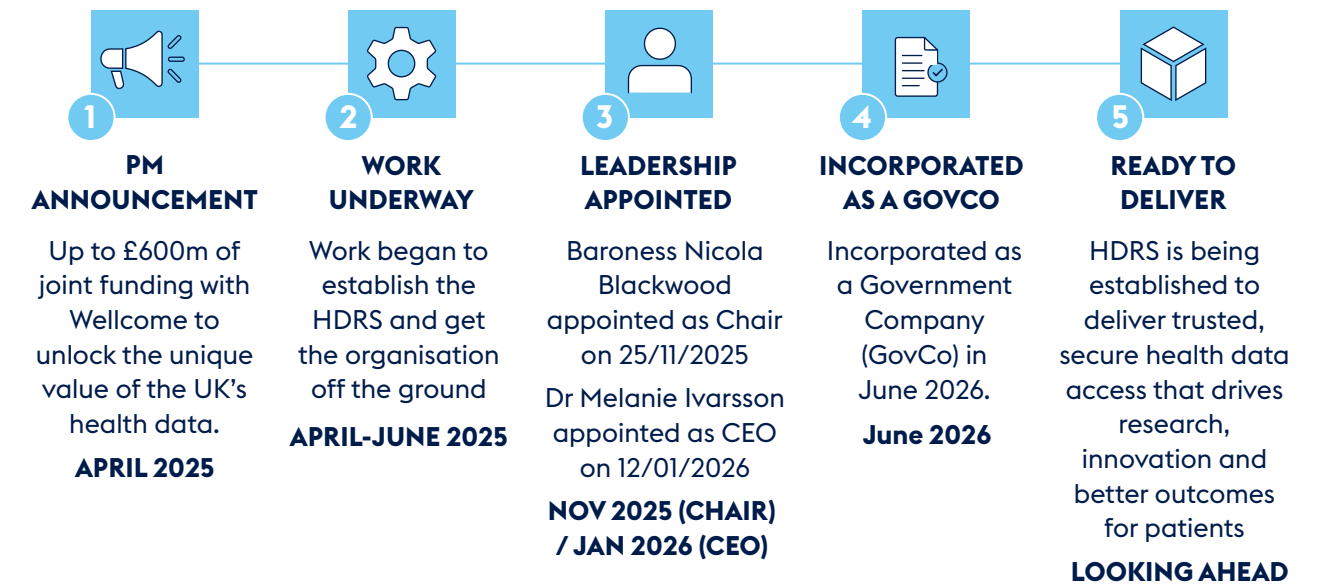
The Headline Six

Government agreed to initially focus on six headline actions critical to the success of the Plan. These have been subject to close scrutiny over the first year, and we have made strong progress across all six:



Health Data Research Service

Building the foundation to unlock the power of UK health data



Life Sciences Innovative Manufacturing Fund

Year one impact



9
PROJECTS
Supported
to date



£87m
in grant
funding



£657m
private
investment
unlocked



270+
JOBS
Created



1,030
JOBS
Safeguarded

Streamlining regulation and market access

Driving faster progress across the system



AI Airlock – Phase 2 concluded
AI Airlock entering its third phase

New devices regulatory model foundations in place

Laying the foundations for a more agile, innovative regulatory system



3 to 6 months faster patient access

MHRA-NICE aligned pathway delivering same-time decisions

NICE National Institute for Health and Care Excellence

232 days from marketing authorisation to NICE recommendation in 2025/26

An updated heart failure guideline is expected to prevent 3,000 deaths and 5,500 hospital admissions annually

Partnering with industry to drive growth and innovation

Deepening collaboration. Strengthening support. Delivering impact.



Obesity Pathway Innovation Programme (OPIP)

- £85m programme backed by government and Eli Lilly
- 12 projects across the UK to improve access to obesity care



UK-BioNTech Strategic Pathway

- £1bn investment in the UK
- Up to 10,000 patients to receive cancer therapies by 2030



Strategic Partnership

- £1bn+ investment in UK R&D
- UK's first population-scale mRNA vaccine manufacturing facility established



Underpinned by a new Life Sciences Partnerships Strategy



And a new Scale-Up Service now working with 10-20 high-potential companies



Stronger partnerships



Greater investment



More innovation

Building a life sciences sector that delivers for patients and powers economic growth

Introducing low-friction procurement

An eco-system-wide approach to improve access to MedTech

FROM FRICTION...



Complex, fragmented processes



Focus on upfront cost not outcomes



Slower uptake of high-potential technologies

WHAT WE'VE DONE



National HealthTech Access Programme

Launched to support uptake of high-impact technologies.

- Initial technologies include:
- Capsule sponge (oesophageal cancer)
- AI tools for prostate and breast cancer



Value Based Procurement

New national guidance introduced to prioritise outcomes and long-term value.

- 100+ industry participants engaged



Innovator Passport

- Compass Alpha completed
- Compass Private Beta underway using real NHS data and trust materials
- Innovator Passport Phase 1 launch by end of 2026

TO FLOW...

Low-friction procurement enabling faster, value-driven access to MedTech



Faster adoption of high-impact technologies



More consistent procurement decisions across the NHS



Earlier access to proven innovation through streamlined decision-making



Better use of NHS resources and long-term value for patients



Better for patients

Earlier access to proven innovations that improve outcomes



Better for the system

More consistent, efficient procurement that reduces duplication and waste



Better value for the future

Value-driven purchasing that delivers sustainable innovation and long-term benefits

Realising a Health Data Research Service (HDRS): Ahead of publication of the Life Sciences Sector Plan, the Prime Minister announced up to £600 million of joint funding with The Wellcome Trust to unlock the unique value of the UK's health data.¹⁵ Since then, work has begun to establish the HDRS and get the organisation off the ground, including incorporation as a Government Owned Company this summer. Baroness Nicola Blackwood and Dr Melanie Ivarsson have been appointed as Chair and CEO to lead delivery.

Reducing clinical trial set-up times to under 150 days: Recognising this as an early priority and a key Prime Ministerial target, we have acted to streamline commercial trial set up by cutting red tape, standardising processes and investing £137 million in health research reforms.¹⁶ Average set-up times for commercial interventional trials have fallen to 122 days in the first six months of 2025/26, down from 169 in the same period in 2024/25,¹⁷ with real

impact on speed of patient access. 73% of studies starting set-up during the first six months of 2025/26 met the 150-day ambition against a target of 95%, up from 45% in the same period in 2024/25,¹⁸

Backing manufacturing with up to £520 million: Through the Life Sciences Innovative Manufacturing Fund (LSIMF), up to £520 million has been committed to secure globally mobile investment. £87 million has been committed so far to nine projects, unlocking £657 million of private investment, creating 272 jobs and safeguarding a further 1,030.¹⁹ We have also launched the Life Sciences Large Investment Portfolio (LSLIP), providing a more strategic, streamlined route for investments over £250 million.²⁰

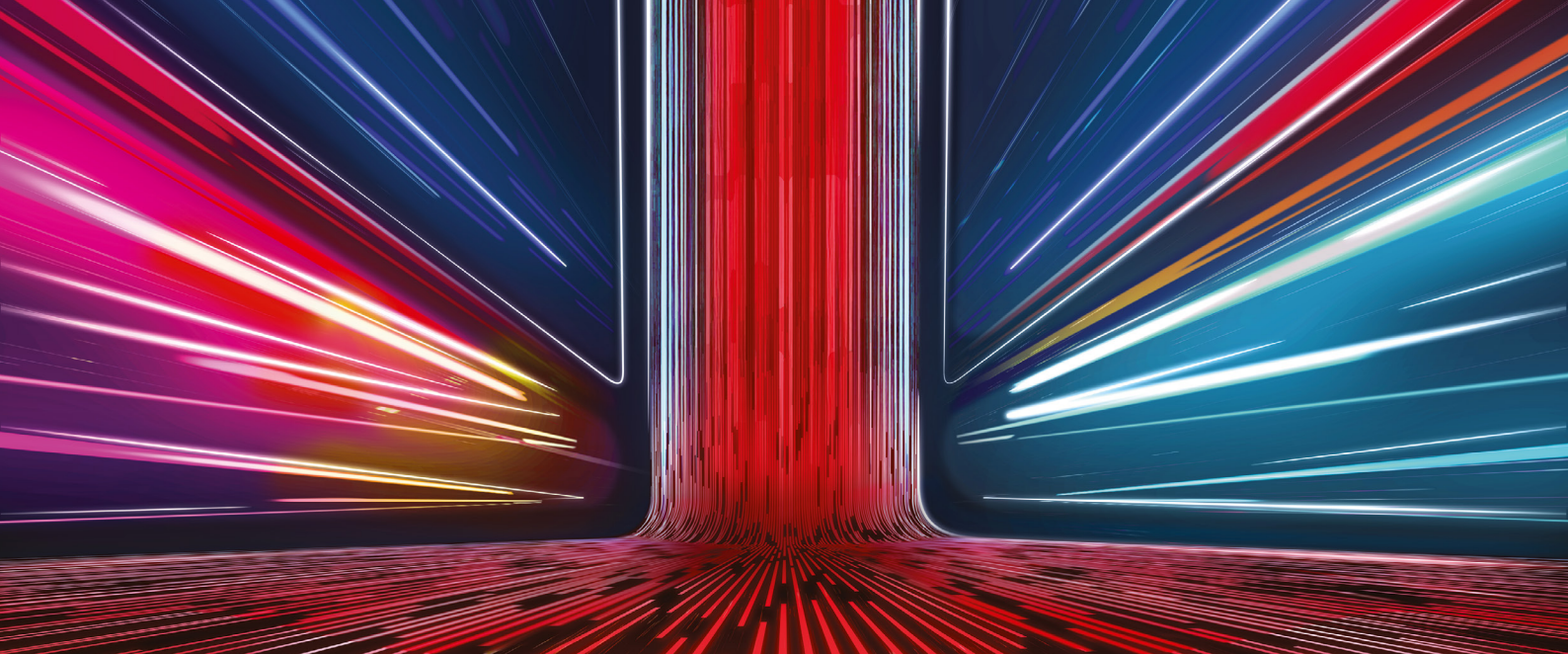
Streamlining regulation and market access: We have driven faster progress across the system. The MHRA has reduced regulatory barriers, secured funding for a third phase of AI Airlock,²¹ and advanced towards a new device regulatory model.²² NICE has reduced the time from marketing authorisation to recommendation by 30%,²³ and updated key guidance to reflect the latest evidence in major disease areas such as prostate cancer, heart failure and diabetes. Updated heart failure guidance could prevent around 3,000 deaths and 5,500 hospital admissions per year.²⁴ Joint working between the two organisations has strengthened, with the aligned pathway, which could allow patients to access new medicines up to six months sooner, delivering its first same-time decisions.²⁵

Introducing low-friction procurement: We have taken an ecosystem-wide approach to improving access to MedTech. This includes launching the National HealthTech Access Programme to support uptake of high-impact technologies,²⁶ alongside new Value Based Procurement guidance to prioritise outcomes, long-term value and sustainability.²⁷

Partnering with industry to drive growth and innovation: We have deepened collaboration with industry and strengthened support for high-potential firms. This includes a new cross-government Life Sciences Partnerships Strategy, the landmark collaboration with Lilly including the £85m Obesity Pathway Innovation Programme,²⁸ and a new Scale-Up Support Service now working with 10-20 leading companies. This is already attracting significant inward investment, including major long-term commitments from BioNTech and Moderna. BioNTech has committed £1 billion to UK R&D and aims to provide up to 10,000 patients with personalised cancer immunotherapies by 2030²⁹, while Moderna is investing over £1 billion in UK R&D and has established the UK's first population-scale mRNA vaccine manufacturing facility³⁰.

To become the leading Life Sciences economy in Europe by 2030 and the third globally by 2035, the UK committed to delivering on 3 interdependent pillars of activity:

- Enabling World Class R&D
- Making the UK an Outstanding Place in which to Start, Grow, Scale, and Invest
- Driving Health Innovation and NHS Reform



Enabling World Class R&D

What We Said We Would Do

The Life Sciences Sector Plan set out a clear focus under this pillar: to enable world class research and development by building on the UK's historic scientific strengths. This includes strengthening the discovery base, improving access to data and research infrastructure, and ensuring innovation can move more effectively from early-stage research through to clinical application and commercialisation.

The Plan prioritised action in three areas:

1. Investment in discovery and curiosity-driven science.
2. Supporting applied research and enabling companies to invest in R&D at scale in the UK.
3. Improving prioritisation, governance, accountability and incentives across the system.

One Year On

Pillar 1: Enabling World Class R&D

Key progress in Year One (latest available data)

 £22.6bn R&D funding by 2029-30 Long-term certainty for the UK's discovery and research base	 £75m Invested in translational models and non-animal science Strengthening the pipeline from discovery to application	 122 days Median commercial clinical trial set up time 73% of trials meeting the 95% target in first 6 months of 2025/26, up from 45% in first 6 months of 2024/25 ↓ 47 days Improvement vs. previous year Notable progress towards the target and improved consistency	 21 + 14 Research delivery centres 21 hospital based 14 in primary care Expanding capacity to accelerate clinical research delivery	 2m+ people Consented to take part in Our Future Health to date 1.5m+ with clinical measurements taken to date Building one of the world's largest and most diverse health research cohorts	 45,000+ Whole genomics sequenced through the NHS Genomic Medicine Service in 2025/26 Driving genomic medicine and powering research and innovation
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System Foundations Strengthened

Health Data Research Service Now being established as a government-owned company, moving into delivery	 Data Access & Governance Policy and legislative reforms advancing to enable secure, efficient access to health data for research and innovation	Coordination & Transparency Progress on a UK-wide research portfolio database and clinical trials visibility platforms to improve alignment and impact	Strategic Direction NIHR Council established to provide strategic oversight of delivery against dual health and growth mandate
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Building a more connected R&D system that drives innovation, attracts investment and delivers better health outcomes.

Together, these commitments are designed to maximise impact across the full R&D ecosystem while safeguarding the UK's established strengths, including its robust intellectual property regime and world leading health data assets.

In the first year of delivery, progress under this pillar has focused on strengthening the UK's R&D foundations while improving the conditions for translation, clinical delivery and innovation at scale. Taken together, this reflects a deliberate shift from strong scientific capability towards a more connected and delivery-focused system.

Government has reaffirmed its commitment to the research base, with the 2025 Spending Review confirming record public investment in R&D, including £1.9 billion UK Research and Innovation (UKRI) funding for Life Sciences over the Spending Review period.³¹ Alongside this, targeted investment is beginning to strengthen the translational pipeline, including £75 million to support the development of pre-clinical models and alternative methods, helping to bridge the gap between discovery and application.³²

We have also made meaningful progress in improving the UK's offer for commercial R&D, particularly in clinical trials. Working towards the target of 95% of studies meeting the 150 day starting setup target, 73% of studies starting set-up during the first six months of 2025/26 met this 150-day ambition, up from 45% in the same period in 2024/25,³³ Median set-up times have also reduced notably from 169 days to 122 days over the same period with performance becoming more consistent across the system.³⁴ Capacity has expanded through a network of Commercial Research Delivery Centres with 21 centres now complemented by a further 14 in primary care,³⁵ and targeted investment in NHS infrastructure funded through the Voluntary Scheme for Branded Medicines Pricing, Access and Growth Investment Programme.³⁶

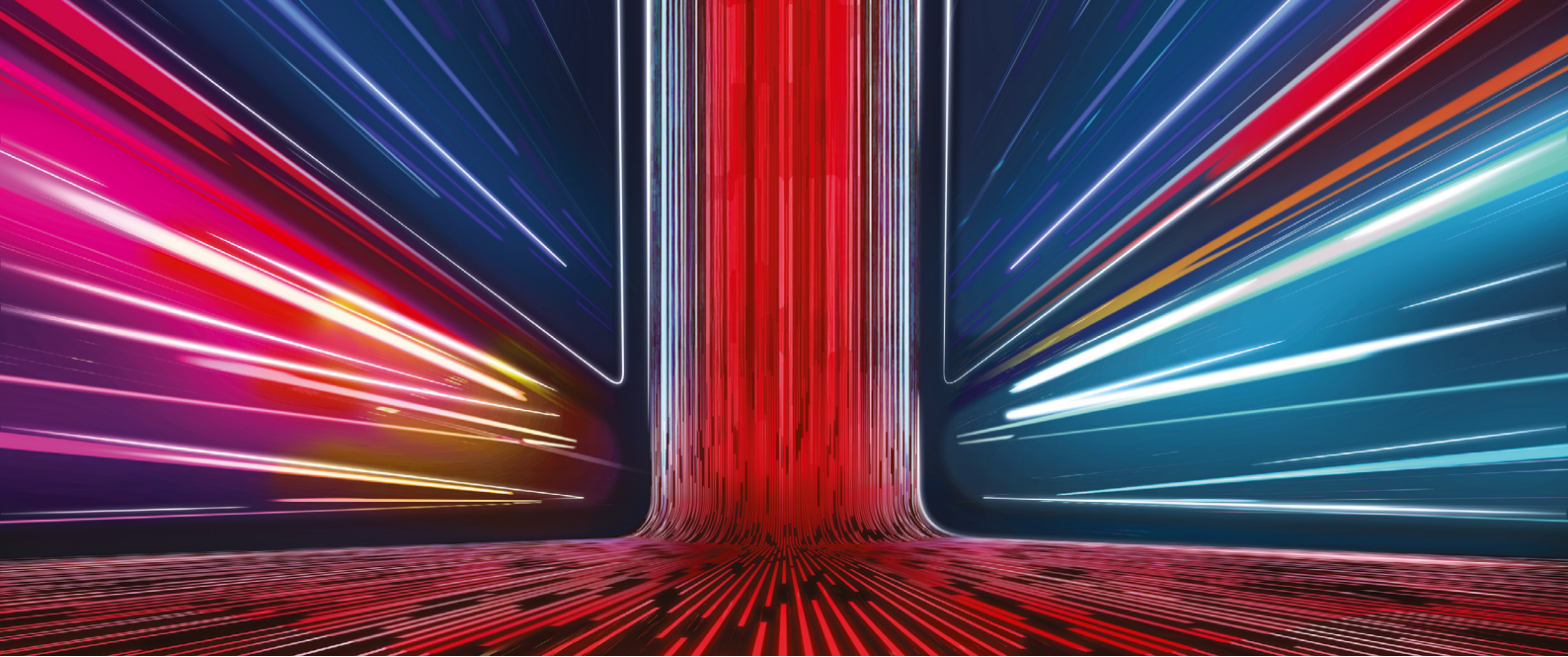
At the same time, we have begun to unlock the UK's data and genomics advantage. The Health Data Research Service is moving into delivery, while major programmes such as Our Future Health and the NHS Genomic Medicine Service continue to scale, creating world-leading research assets. Our Future Health has recruited over 1.5 million full participants with clinic measurements data³⁷ and the NHS Genomics Medicine Service delivered over 850,000 genomics tests and sequenced over 45,000 whole genomes in 2025/26.³⁸

Overall, the UK has strengthened its core R&D capability and begun to address long-standing barriers to delivery. While progress has been made in improving system performance, further work is needed to ensure consistency and accelerate translation at scale. The next phase will focus on embedding performance and driving stronger linkages between discovery, development and adoption.



Quell Therapeutics – CHILL trial

The UK is supporting pioneering early phase trials such as Quell Therapeutics' CHILL study, a first in human CAR Treg therapy for autoimmune disease. The therapy is designed to regulate immune responses by targeting B cells and modulating inflammatory pathways, with the aim of reducing disease activity in conditions such as rheumatoid arthritis and systemic sclerosis. Initiated in 2026 following MHRA clinical trial authorisation, the multinational study is recruiting patients in the UK and Europe. Its rapid setup, taking just 113 days between regulatory filing and first participant screened,³⁹ demonstrates the UK's ability to deliver complex advanced therapy trials at pace. This in turn reflects progress against the Life Sciences Sector Plan's ambition to streamline clinical trial delivery and improve the UK's attractiveness as a location for research. Ultimately, trials like CHILL exist to improve outcomes for patients living with debilitating autoimmune conditions who have not responded to available treatments, fulfilling the ambition that a stronger UK research environment translates into faster access to transformative therapies for the people who need them most.



Making the UK an outstanding place in which to start, grow, scale and invest

What We Said We Would Do

The Life Sciences Sector Plan set out a clear objective to strengthen the UK's business environment and position it as a leading destination for life sciences start-ups and investment. This included improving access to capital, strengthening manufacturing capability and increasing foreign direct investment, supported by a more proactive and coordinated approach to company support.

The Plan prioritised action across five areas:

- 1.** Access to finance
- 2.** Skills
- 3.** Manufacturing
- 4.** Net zero
- 5.** High-value partnerships

One Year On

Pillar 2: Making the UK an outstanding place to start, grow and invest

Key progress in Year One (latest available data)

 £4 billion Industrial Strategy Growth Capital across the Industrial Strategy growth-driving sectors Strengthening access to finance for life sciences companies	 £657m Private investment unlocked through LSIMF Supporting 9 projects	 £5bn+ Annual pharma exports protected to the US UK-US arrangement securing tariff-free pharmaceutical exports	 10–20 High-potential scale-ups supported Through the Life Sciences Scale-Up Service	 1,300+ Jobs created or safeguarded Across LSIMF projects	 £85m Obesity Pathway Innovation Programme with Lilly Driving innovation, health outcomes and economic growth
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Stronger foundations. Greater confidence. More investment. Delivering tangible progress across finance, skills, manufacturing, net zero and partnerships – building a more competitive UK life sciences ecosystem and attracting global investment outcomes.



Full action-by-action update available in Annex for complete transparency on progress against all commitments.

In the first year of delivery, progress under this pillar has focused on strengthening the UK's investment proposition and improving the conditions for companies to start, scale and remain in the UK. Taken together, this reflects a more proactive and targeted approach to supporting growth, attracting investment and building long-term industrial capability.

The British Business Bank is committing an additional £4 billion of Industrial Strategy Growth Capital across the Industrial Strategy growth-driving sectors (IS-8), expected to crowd in around £12 billion of private investment.⁴⁰ For life sciences, this includes targeted support for specialist funds such as Apposite Healthcare Growth (£100 million, April 2026),⁴¹ Epidarex (£50 million, January 2026),⁴² alongside direct investments into high potential companies including Cytospire Therapeutics (£12 million, May 2025)⁴³ and IMU Biosciences (£5 million, June 2026).⁴⁴ Together, this is improving access to finance for scaling firms and strengthening the UK's pipeline of investable life sciences opportunities.

At the same time, we have made strong progress in securing globally mobile manufacturing investment. Through the Life Sciences Innovative Manufacturing Fund, £87 million has been committed so far to nine projects, unlocking £657 million of private investment, creating 272 jobs and safeguarding a further 1,030⁴⁵. Building on this momentum, the Life Sciences Innovative Manufacturing Fund has a substantial and high-quality pipeline of prospective investments across a range of sub-sectors and UK regions, with further awards expected to be announced in due course as the scheme progresses. This is complemented by a more strategic, coordinated approach to landing major investments through the Life Sciences Large Investment Portfolio.

We have also strengthened the broader environment for growth, including support for exports, skills and talent, and high-potential scale-ups. The UK-US Pharmaceuticals Arrangement,⁴⁶ covering at least £5 billion of exports annually,⁴⁷ has reinforced the UK's global competitiveness, alongside enhanced export support and in-market activity to help companies access international opportunities. We are building a more responsive, flexible, and employer-focussed skills system, designed to adapt quickly to rapid workforce change, close sectoral skills gaps, and lift productivity. We are also strengthening support for high-growth companies, including through the Life Sciences Scale-Up Service.

In parallel, we have continued to build strategic partnerships and improve system coordination. A strong pipeline of partnerships has been developed, including a major collaboration with Lilly delivering an £85 million programme,⁴⁸ alongside wider work to embed a more strategic and coordinated approach across government and industry.

Overall, the UK holds a strong position as a competitive destination for life sciences investment but still lags behind the US and China.⁴⁹ There is a strong base to build on, particularly in access to capital, manufacturing investment, and strategic partnerships. At the same time, continued focus will be required to scale investment and support more companies to grow and remain in the UK. This will include delivering the full benefit of the UK-US Pharmaceutical Arrangement and translating improved market access into sustained export growth and inward investment. The next phase, now underway, will focus on scaling investment, translating improved market access into sustained growth, and strengthening industrial capability across the ecosystem.

Isomorphic Labs – scaling AI-driven drug discovery

London-based Isomorphic Labs raised \$2.1 billion in Series B funding in May 2026,⁵⁰ one of the largest ever biotech fundraising rounds globally,⁵¹ and the UK's largest fundraise for an AI company in the first half of 2026.⁵² Led by Thrive Capital, the round attracted a mix of global and sovereign investors, including Alphabet, Temasek and the UK Sovereign AI Fund. The investment will scale its AI drug design engine and progress a pipeline of new medicines towards clinical trials. This demonstrates the UK's ability to attract major international capital into high-growth life sciences businesses, backing the development of new medicines, creating high-value jobs and strengthening the UK's position in one of the most strategically important sectors for future economic growth.

Securing a competitive edge through the UK-US Pharmaceuticals Arrangement

Global competition for life sciences investment has intensified since the publication of the Life Sciences Sector Plan. In response, the UK has taken a more strategic approach to international engagement, aligning trade, investment and policy levers behind clear sector priorities and bringing these functions into a single, coordinated approach.

A central achievement has been the UK-US Pharmaceuticals Arrangement, published in April 2026, which secured a commitment to no additional tariffs on pharmaceuticals or medtech exports under US Section 232 or Section 301 investigations for at least three years. The UK is the first and only country to secure these commitments which provide certainty for UK exporters, reduce supply chain risk and strengthen the UK's position as a globally competitive location for life sciences manufacturing and innovation.

Global engagement has been focused on securing commercial outcomes. Prime Ministerial visits have landed significant investments, including AstraZeneca's \$15 billion investment in China which supports 10,000 UK jobs,⁵³ while a coordinated UK presence at major conferences such as BIO, JP Morgan and AdvaMed has strengthened the UK's global profile.

Alongside this, targeted action is set to improve market access. MHRA and NICE have secured dedicated funding to address life sciences market access barriers as part of the Ricardo Fund⁵⁴ - including support for increased regulatory collaboration between the MHRA and India's Central Drugs Standard Control Organisation to open new export opportunities.

This approach is delivering tangible results. Since publication, the UK has secured over £3 billion in public-private investment from international life sciences companies, including major long-term commitments from Moderna and Orchard Therapeutics.⁵⁵

Looking ahead, the next phase will focus on deepening industrial capability and sustaining momentum already underway, with a stronger focus on supporting UK scale-ups to access global markets and securing further inward investment.

AstraZeneca's £300 Million Vote of Confidence in UK Life Sciences

In April 2026, AstraZeneca announced a £300 million investment in the UK, representing a commitment to the country's life sciences sector.⁵⁶ This investment was made possible because of work begun by the UK Government to improve the environment for life sciences in the UK, including the UK-US Pharmaceuticals Arrangement, measures supporting timely access to innovative medicines for NHS patients, and collaboration with industry on the next wave of reforms required to meet the UK's objectives.

The investment from AstraZeneca includes the completion of the Rosalind Franklin building on the Cambridge Biomedical Campus, Europe's largest centre of medical research and health science,⁵⁷ which will enable the co-location of around 1,000 AstraZeneca employees. This consolidation will strengthen AstraZeneca's capabilities and its workforce in the region.

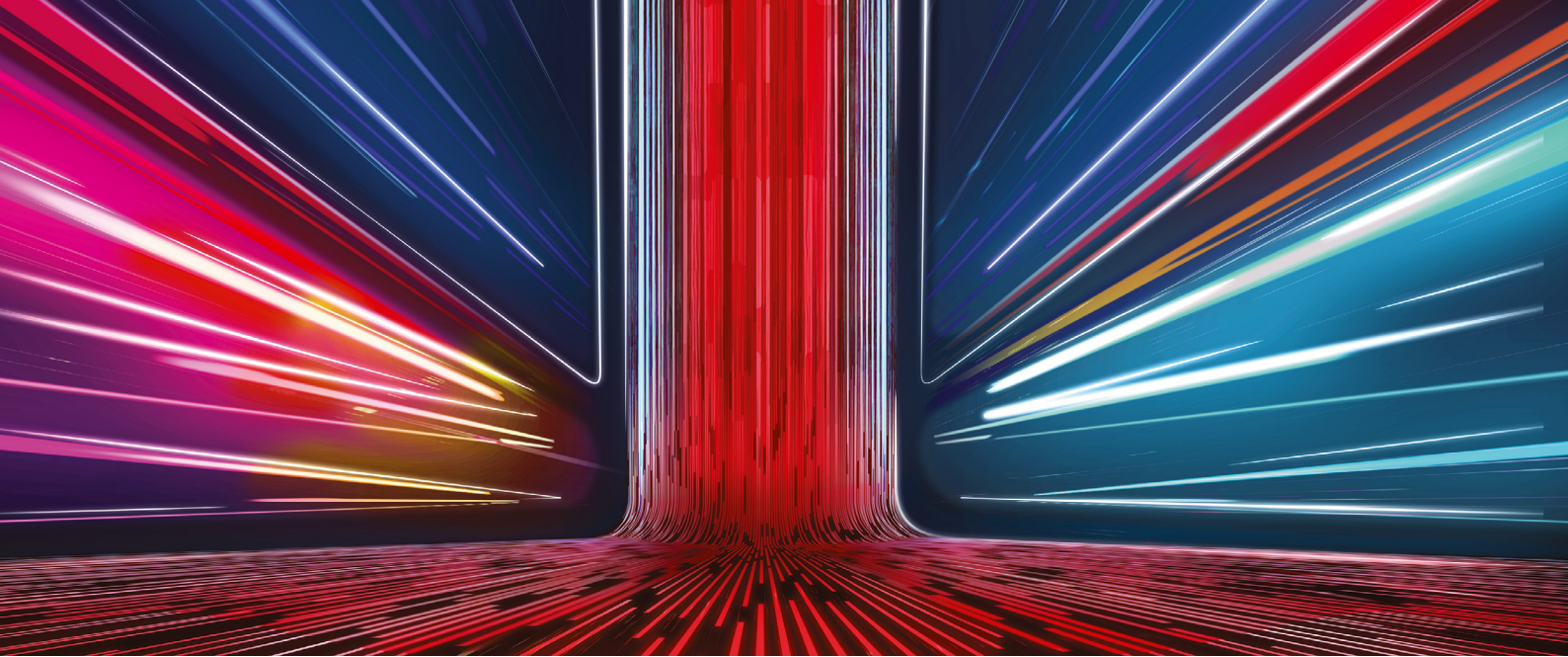
A significant investment will also be made in AstraZeneca's site in Macclesfield, focusing on modernisation and capability enhancement. The Macclesfield site, celebrating its 60th anniversary this year, is a unique co-location of functions across medicines development, manufacturing and distribution. The investment for this site includes a 'Lab of the Future' that will use digital and data tools to advance drug development, alongside essential infrastructure upgrades. These projects represent a facility modernisation programme that will secure manufacturing capabilities and jobs at the site.

AstraZeneca employs around 10,000 people across five UK sites⁵⁸ and, as the largest R&D investor of any UK company,⁵⁹ maintains a long-standing commitment to life sciences in the country. The company has welcomed the government's steps to strengthen the UK's life sciences environment, including increasing NICE's cost per Quality-Adjusted Life Year (QALY) threshold, committing to doubling expenditure on new medicines, and capping industry rebate rates. AstraZeneca looks forward to continued collaboration with the Government on improving access to innovative medicines and securing the UK's position as a leading destination for life sciences within the evolving geopolitical context.

Industrial Strategy: strengthening the conditions for growth

One year on from publication, the Industrial Strategy has moved from intent into delivery, giving businesses the confidence to invest and grow. Industry has responded with at least £360 billion in private investment commitments, supporting over 120,000 jobs across the UK.⁶⁰ Furthermore, Government has provided the British Business Bank with £4 billion of additional capital to support investment into the 8 Industrial Strategy Sectors (IS-8), expanded the mandate of the National Wealth Fund to £27.8 billion⁶¹ and directed more than £9 billion into frontier research and innovation through UKRI.⁶² Alongside this, major action on skills, energy costs and place, including new Technical Excellence Colleges, targeted support for energy-intensive industries, and investment in growth corridors, is improving the overall environment for scale-up and long-term investment. Together, these measures are strengthening the UK's attractiveness as a destination for globally mobile life sciences investment and supporting the conditions for innovative firms to start, scale and stay in the UK.

Looking ahead, the Government is doubling down on delivery in response to a challenging global environment. This includes action to reduce energy costs for over 10,000 firms,⁶³ deliver sector Jobs Plans to expand the skills pipeline, accelerate investment-ready sites, and reduce regulatory burdens on businesses. Continued investment to areas such as defence, digital and advanced manufacturing will further reinforce the UK's innovation ecosystem. Taken together, these reforms will provide a stronger platform for life sciences growth by improving access to skills, capital, infrastructure and markets, and by ensuring that the UK remains a competitive location for research, innovation and commercialisation.



Driving Health Innovation and NHS Reform

What We Said We Would Do

The Life Sciences Sector Plan set out a clear ambition to deliver both economic growth and improved health outcomes, recognising that success depends not only on growing the UK's Life Sciences sector but also on ensuring patients benefit more quickly from innovation.

Developed alongside the NHS 10 Year Health Plan, the Life Sciences Sector Plan was a unique opportunity to bridge growth and health policy from the start. By aligning actions across both plans from the outset, government has created a more joined-up approach in which stronger industry performance and better patient outcomes are pursued as part of the same agenda.

The Plan prioritised action in two areas:

1. Ensuring regulatory and market access systems get innovation to the NHS faster
2. Ensuring all patients have access to clinically and cost-effective innovations

One Year On

Pillar 3 - Driving health innovation and NHS Reform

Key progress in Year One (latest available data)

 232 days Time from marketing authorisation to NICE recommendation (2025/26) • 30% faster than 2024/25 • Improved timeliness of NICE decision-making to get treatments to patients faster	 16 of 18 Medicine groupings in the Innovation Scorecard saw increased uptake in the latest publication (April 2026) Expanded view of innovation uptake, with work underway to include MedTech and improved regional data	 £60m OLS investment in the Health Innovation Network over three years • In 2025/26, the Network leveraged around £1.5bn in investment and created or safeguarded over 1,500 jobs through innovator support • Improving adoption and spread of innovation across the NHS	 £90m+ OLS investment in the Healthcare Goals programme over 5 years across five major health challenges Driving innovation and improving health outcomes for patients	 Aligned pathway launched, MHRA and NICE decisions coordinated • Improving regulatory and market access through greater alignment and coordination. • Allowing patients to access medicines up to 3–6 months faster
 Faster adoption. Stronger outcomes. Greater impact. Building a health system that translates innovation into benefits for patients, the NHS and the economy.				
 Full action-by-action update available in Annex for complete transparency on progress against all commitments.				

In the first year of delivery, progress under this pillar has focused on improving how innovation moves through the system, from regulatory approval to adoption in the NHS. This reflects a shift towards a more integrated and delivery-focused health and innovation system, with closer alignment between regulators, payers, and the NHS.

We have made meaningful progress in accelerating routes to market. The MHRA has advanced more proportionate and internationally aligned regulatory approaches, while joint work with NICE is beginning to streamline regulatory and reimbursement pathways. An aligned pathway is now in place, enabling same time decisions and bringing some treatments to patients up to three to six months sooner.⁶⁴

At the same time, improvements in NICE processes are supporting faster innovation. Median timelines from marketing authorisation to NICE recommendation have reduced to 232 days, a 30% improvement on the previous year.⁶⁵ Continued progress through the Whole Lifecycle Approach is also ensuring guidelines and guidance are updated more rapidly as new evidence emerges, improving outcomes across major diseases. In addition, NICE has launched the cross-partner National HealthTech Access Programme to ensure faster and fairer access to high-impact HealthTech innovations nationally.⁶⁶

We have also taken steps to reduce friction across the system and support more consistent uptake of innovation. This includes progress on a Single National Formulary, designed to ensure patients across England have equal access to the same medicines regardless of where they live; strengthened uptake of biosimilar medicines, which are biological medicines shown not to have any clinically meaningful differences from the originator in terms of quality, safety and efficacy, and which typically offer lower-cost options for the NHS;⁶⁷ and new approaches to value-based procurement and contracting for MedTech, shifting purchasing decisions towards measurable outcomes such as quality of care and long-term cost reduction.

We have also backed the Health Innovation Network with £60 million of OLS investment over three years, strengthening its role in supporting innovators and accelerating uptake across the NHS. In the last year alone, the Network contributed £1.5 billion to the UK economy and created or safeguarded 1,500 jobs through its innovator support.⁶⁸ In addition, a series of pilots will test ways to get innovative medicines to NHS patients faster, and support investment in the UK. The pilots have been developed through a joint government and industry Taskforce, created to deliver on the commitments set out in the UK-US pharmaceutical arrangement.⁶⁹ Taken together, these changes are helping to improve how innovation is adopted and spread across the NHS.

Finally, we have strengthened the link between innovation and patient outcomes through targeted programmes and partnerships. The Healthcare Goals programme is driving progress across five priority disease areas: addiction, cancer, dementia, mental health and obesity. It brings together industry, academia, charities and the NHS under ministerially appointed expert chairs to co-invest in research and accelerate the development and adoption of new treatments and technologies. Our projects will have real impacts for patients. We are testing innovative pathways to provide the best level of care for people living with obesity, funding cutting-edge innovations to enable early diagnosis of cancer and to treat addiction, and strengthening the UK research landscape to develop better diagnostic tools and treatments for mental health and dementia. Alongside this, we have made early progress in embedding a growth mandate in NHS commercial activity and

strengthening transparency through the Innovation Scorecard. The latest data published in the Scorecard in April 2026 shows that of 18 innovative medicine groupings tracked, 16 showed improved uptake.⁷⁰

While progress has been made in reducing regulatory timelines and better aligning the system as a partner to innovation, variation in adoption and implementation remains a challenge. The next phase will focus on scaling uptake, reducing unwarranted variation, and delivering measurable improvements in patient outcomes and system productivity.

10 Year Health Plan: delivering system reform to support innovation

One year on from its launch, the 10 Year Health Plan is already beginning to reshape the conditions for innovation and adoption across the health system. The Life Sciences Sector Plan was developed in close alignment with the 10 Year Health Plan, with actions co-designed to ensure that system reform and sector growth are mutually reinforcing. Early delivery is supporting the Plan's three core shifts: from hospital to community, analogue to digital, and sickness to prevention. This is being done through improvements in pathways, greater use of data and technology, and a stronger focus on earlier intervention. Together these reforms are creating a more innovation-ready NHS which is better able to adopt and scale new medicines technologies and approaches.

As delivery accelerates, this alignment will be critical to improving the speed and consistency of patient access, strengthening the UK's clinical research environment, and providing a more predictable and scalable market for innovative products. Continued progress against the three health shifts will support life sciences growth by enabling earlier adoption, more effective use of data, and a system that is better equipped to deliver population-level health improvements. This will help ensure that the UK remains both a global leader in life sciences and a country where innovation is rapidly translated into patient benefit.

Driving MedTech adoption through industry engagement and co-delivery



In January 2026, the UK Government convened senior European leadership from leading MedTech companies alongside UK innovators to showcase delivery and strengthen engagement with the sector. The event enabled direct dialogue between ministers and industry decision-makers, supporting investment decisions and reinforcing confidence in the UK as a leading destination for MedTech. The group will reconvene in early 2027 to discuss the next phase of delivery.

This engagement is translating directly into delivery. Action 29 commits to streamlining access and adoption of MedTech by reducing duplication and introducing low-friction procurement and contracting mechanisms. Over the past year, progress has been taken forward across a range of initiatives, including Value Based Procurement and the Innovator Passport.

Advancing Value Based Procurement (VBP)

The Department of Health and Social Care launched an industry readiness survey to benchmark perceptions and identify barriers to implementation of holistic procurement. Over 100 participants, including strong SME representation, took part in targeted workshops on practical challenges such as value identification, measurement and contract management. This has helped shape implementation planning and ensures the approach reflects real-world market conditions.

Introducing the Innovator Passport

In parallel, the Innovator Passport is being developed to reduce duplication in local purchasing decisions and accelerate patient access.⁷¹ A dedicated Task and Finish Group, bringing together NHS industry and policy experts, has co-developed the approach, translating engagement into delivery by testing proposals, defining scope and key principles, and shaping phased implementation. Phase one is expected to launch by the end of 2026.

This collaborative process has ensured the Passport reflects both system realities and industry needs and has helped build early buy-in from the organisations that will use it in practice. The alpha phase of Compass, the digital platform underpinning the Passport, is complete, with a private beta now underway using real data from NHS trusts.

Impact for patients and industry

Together these initiatives demonstrate how close partnership with industry is driving delivery. By reducing duplication and introducing more efficient procurement and contracting mechanisms, this work will support faster patient access to proven technologies, more consistent decision-making across the NHS, and a clearer, more predictable route to market, strengthening the UK's attractiveness for MedTech innovation and investment.

The Health Innovation Network: Brokering Industry-NHS partnerships to improve respiratory care

Respiratory disease is a major health and economic challenge, with 1 in 5 adults affected ⁷² and an estimated cost to the UK economy of £188 billion a year.⁷³ The Respiratory Transformation Partnership, launched in March, brings together four major pharmaceutical companies – AstraZeneca, Chiesi, GSK, Sanofi – local and national NHS, the Health Innovation Network, Government, charities and professional bodies to drive whole-pathway transformation in asthma and chronic obstructive pulmonary disease (COPD) care.

Led and brokered by Health Innovation Oxford and Thames Valley on behalf of the 15 Health Innovation Networks, the unique national initiative – backed by contributions from OLS, NHS England and industry⁷⁴ – aims to improve asthma and COPD care through earlier diagnosis, better access to treatment and more proactive care closer to home.⁷⁵ It brings policy, commissioning, innovation and frontline adoption together under one programme. Early impact includes 4,416 earlier diagnoses of asthma and COPD across nine sites over the first six months.⁷⁶

The partnership demonstrates the Network's distinctive role as a national delivery infrastructure: identifying NHS need, convening partners around a shared vision, leveraging industry and government funding and scaling adoption activity. It provides a blueprint for how NHS-industry collaboration can improve patient outcomes, reduce pressure on services and support UK life sciences growth.

QuicDNA Max: Advancing Access to Innovative Diagnostics in Wales

The UK and Devolved Governments share an ambition to improve cancer outcomes and patient access to innovative diagnostic and therapeutic technologies. The Office for Life Sciences' Cancer Healthcare Goal aims to accelerate the development and adoption of breakthrough technologies across the UK. The Cancer Healthcare Goals Programme and the Welsh Government have jointly committed £2.52m in 2025 to support the QuicDNA Max Programme.⁷⁷

This builds on QuicDNA, the Welsh Government's flagship life sciences collaboration within NHS Wales.⁷⁸ The programme is evaluating the effectiveness of liquid biopsies diagnostic tests which are able to detect the presence of genomic cancer markers within a sample such as blood.

This gives patients with suspected lung cancer access to innovative diagnostic technologies that can provide genomic profiling within up to two weeks. For patients with advanced lung cancer, delays to diagnosis can significantly affect treatment options and survival outcomes. By reducing turnaround times for genomic profiling, QuicDNA supports faster, better-informed personalised treatment decisions and improved quality of life for people living with cancer.

Despite overall improvements in cancer survival rates in Wales over the past 20 years, significant inequalities persist between the most and least deprived areas.⁷⁹ The QuicDNA Max investment will catalyse the programme's expansion into more cancer types and delivery across all Welsh health boards. This will ensure more patients gain wider access to clinically effective liquid biopsy diagnostics and a wider range of treatment options, supporting earlier cancer diagnosis and better outcomes.

In particular, for cancers that often present at later stages and are associated with poorer outcomes, this approach offers a real opportunity to help address the gap in outcomes between more and less survivable cancers.

This investment shows what can be achieved when the UK Government and the Welsh Government work together to deliver world-class research in Wales. The Office for Life Sciences will continue to work with counterparts in the Welsh Government to explore securing additional industry investment into QuicDNA Max and identify new opportunities to unlock growth in the Wales's life sciences sector.

Supporting Generic and Biosimilar Medicines

Generics and biosimilars remain a crucial part of the Life Sciences sector, ensuring value for patients and the NHS while supporting sustainability and resilience. Over the first year of the Life Sciences Sector Plan we have taken steps to strengthen the environment for these products and progressing towards the ambition of becoming a world leader in the uptake of off-patent medicines, including:

- Advancing regulatory efficiency, through the introduction and early implementation of the International Recognition Procedure, reducing duplication and supporting faster access to established medicines.⁸⁰
- Investment through the Life Sciences Innovative Manufacturing Fund, including awards to Accord Healthcare, which supported a £45 million investment in North Devon,⁸¹ and Sterling Pharma Solutions in the West Midlands.⁸² Accord's site acts as a key hub for manufacturing, testing and distribution across Europe, supporting both regional employment and UK supply chains.
- Supporting uptake of off-patent medicines, building on the UK's high rate of generic prescribing⁸³ and reinforcing the role of biosimilars in delivering better value and creating headroom for innovation. This is being supported through NHS England's delivery of the Best Value Biologics programme.⁸⁴
- Laying the foundations for improved procurement, including through implementation of the Procurement Act 2023, supporting earlier visibility of NHS tenders, streamlined processes and improved market engagement.

We will build on this progress to support faster uptake of clinically and cost-effective treatments, strengthen market predictability, and ensure the UK remains an attractive environment for both innovative and off-patent medicines, working closely with industry to support the growth of the generics and biosimilars sector.

What comes next

One year on, the Life Sciences Sector Plan is moving from ambition into delivery. Together with industry, we have laid strong foundations, built momentum across the system, and demonstrated what can be achieved through a genuine partnership between government, business, the NHS and academia.

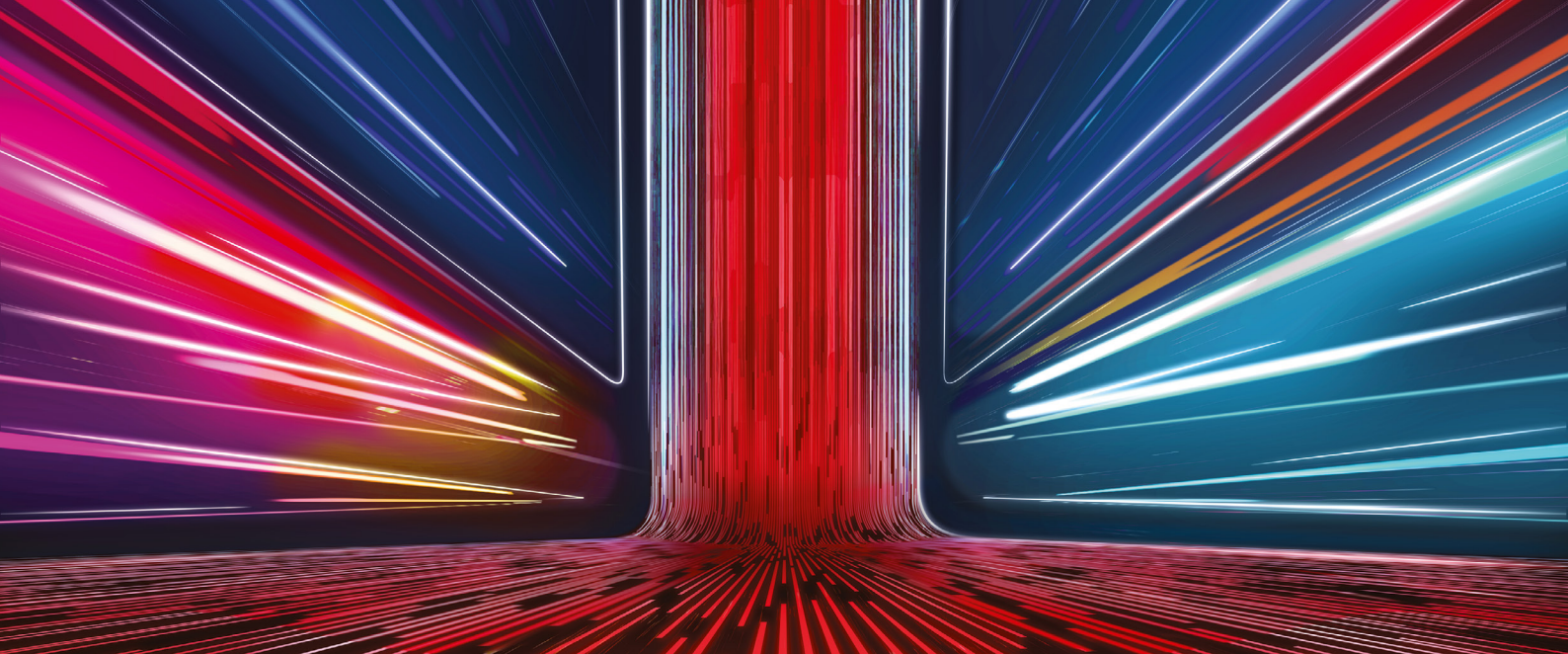
But this is only the beginning. Delivering the full ambition of the Plan will require sustained pace, continued collaboration and a relentless focus on outcomes. We must go further and faster to ensure the UK remains a globally competitive destination for investment and that innovation is translated into real benefits for patients.

The year ahead will be critical. We will continue to work closely with industry to unlock new opportunities for growth, strengthen the conditions for research and investment, and remove the barriers that hold the sector back. From discovery through to adoption, our shared ambition is a system that is faster more predictable and more attractive for innovators to develop and scale in the UK. We remain committed to the open and sustained dialogue with industry that has defined Year One, including through Task and Finish Groups established in partnership with industry, the publication of annual progress updates, and by convening key stakeholders to drive meaningful and lasting change.

Our focus will now be on delivery across the full set of actions, including accelerating progress against the most critical priorities and ensuring that commitments made in the first year translate into measurable outcomes. This will include going further on the areas already driving change, such as faster clinical trials and more streamlined regulation as well as stronger support for scaling innovative companies.

Government cannot deliver the ambitions of the Industrial Strategy alone, just as we cannot realise the full potential of the Life Sciences Sector Plan without the continued partnership of industry. We will continue to deepen this partnership, supporting businesses to invest innovate and grow in the UK, and working together to accelerate the development and adoption of new technologies.

We are confident in the strength of the UK's life sciences ecosystem and in the depth of partnership that underpins it. By building on the progress of the past year, and by maintaining a clear focus on delivery, we can drive growth, support a stronger NHS, and ensure the UK leads in life sciences in Europe while strengthening its position globally.



Annex – Action by Action Delivery Updates

The Life Sciences Sector Plan was designed in close partnership with industry, academia and the NHS, and shaped by extensive engagement across the sector. A consistent message from stakeholders was that previous strategies had too often fallen short on accountability and delivery.

We responded by setting out a clear programme of action, with each commitment assigned to a Senior Responsible Officer accountable to Ministers for delivery against defined metrics. This approach was intended to ensure that the Plan is not only ambitious, but deliverable. We have remained committed to this model, and, with changes to roles and responsibilities across government, have continued to ensure that actions sit with the best placed individual. Where the Senior Responsible Officer has changed since the Life Sciences Sector Plan was published, we have marked this with an Asterix.

The following section sets out progress across all actions over the past 12 months, alongside the next steps for the coming year as we move into the next phase of delivery.

Pillar 1 - Enabling World Class R&D

Investment in discovery and curiosity driven science

Action 1: The Government will continue to invest at scale in discovery science. [UK]

SRO: Executive Chair,
Medical Research Council

Progress: Government has reaffirmed its commitment to discovery science as a central pillar of the Industrial Strategy. The 2025 Spending Review confirmed £22.6 billion per year for research and development by 2029 to 2030, in support of the government's modern Industrial Strategy⁸⁵, providing long-term certainty for the UK's research base. This underpins sustained investment through UK Research and Innovation (UKRI), including £1.9 billion UKRI funding for Life Sciences over the spending review period⁸⁶ and supports a strong and diverse discovery pipeline, reinforcing the UK's position as a leading destination for early-stage research and innovation.

Next steps: Over the next year, UKRI will continue to invest in a strong portfolio of discovery research, ensuring funding commitments translate into delivery and impact. This will include improving the visibility and coherence of the funding landscape to support investor and sector confidence, and strengthening the pipeline from discovery through to translation, helping to sustain innovation, growth and improved health outcomes.

Delivering applied research and supporting companies to invest in R&D at scale in the UK

Action 2a: The Government will establish pre-clinical translational infrastructure to drive development of pre-clinical models as an alternative to animals and will develop up to three fully integrated translational networks in key disease areas. [UK]

SRO: Executive Chair,
Medical Research Council

Progress: We have progressed delivery of pre-clinical translational infrastructure to strengthen the UK's capability in human-relevant disease models, as detailed in the Replacing Animals in Science Strategy. A competition has been launched to identify a host site for a new translational models Hub⁸⁷, which will develop high-quality in vitro models to support medicines discovery and reduce reliance on animal testing. In parallel, the scope of the Translational Research Network has been refined to focus on patient-based cohorts, with plans to build on and expand the National Institute for Health and Care Research BioResource. Engagement with partners is underway to shape a collaborative, system-wide approach.

Next steps: Over the next year, we will award funding and establish the Translational Models Hub, working with the host site and partners to build a national capability in in-vitro model development. In parallel, we will complete the design and launch of the initial Translational Research Network, with delivery commencing in 2026 to 2027, strengthening the UK's translational infrastructure and supporting faster progression from discovery to clinical application.

Delivering applied research and supporting companies to invest in R&D at scale in the UK

Action 2b: The Government will, by the end of 2025, publish a strategy to support the development, validation, and uptake of alternative models to reduce, and where possible, eliminate the use of animals, ensuring that the full suite of policy levers is deployed in addition to further investment in R&D. [UK]

SRO: Director, Office for Life Sciences

Progress: This action has been delivered with the publication of the 'Replacing Animals in Science' strategy in November 2025. The strategy sets out a comprehensive approach to supporting the development, validation and uptake of alternative methods, strengthening the UK's position as a global leader in non-animal science. Backed by £75 million of investment, it will accelerate the development of innovative testing approaches, support more efficient regulatory pathways and deliver scientific, economic and animal welfare benefits.⁸⁸

Next steps: The priority now is delivery. Over the next year, we will take forward the 26 commitments set out in the strategy, focusing on the infrastructure and system changes needed to enable widespread adoption of alternative methods. This includes progressing the pre-clinical translational models Hub and embedding the use of non-animal data within regulatory pathways through early engagement with the MHRA, driving real-world uptake across the life sciences ecosystem.

Action 3: The Government will cut bureaucracy and standardise contracts to reduce the set-up time for commercial interventional clinical trials to <150 days by March 2026. [UK]

SRO: Chief Scientific Advisor, Department of Health and Social Care

Progress: We have made significant and sustained progress towards the 150-day target for commercial clinical trial set-up. National data published in April 2026 shows median set-up times reduced to 122 days in the first six months of 2025-26, down from 169 in the first six months of 2024-25.⁸⁹ Performance has also become more consistent, with 73% of studies starting set-up during the first six months of 2025/26 met the 150-day ambition against a target of 95%, up from 45% in the same period in 2024/25.⁹⁰ This reflects concerted action to reduce bureaucracy, strengthen end-to-end performance oversight and drive improvement across the system, supported by the National Institute for Health and Care Research Industry Hub.

Next Steps: The next phase will focus on achieving consistent delivery against the 150-day target. We will strengthen reforms to improve speed and predictability across the clinical trials pathway, targeting underperforming areas to reach the 95% ambition. We will also increase recruitment by strengthening site capacity and accelerating study activation. To support transparency, we will publish trust-level performance data and recognise high-performing sites, with full-year data to March 2026 published in October 2026.

Delivering applied research and supporting companies to invest in R&D at scale in the UK

Action 4: Significantly expand commercial clinical trials capacity via funding from the Voluntary Scheme for Branded Medicines Pricing, Access and Growth (VPAG) Investment Programme. **[UK]**

SRO: Chief Scientific Advisor, Department of Health and Social Care

Progress: We have expanded the UK's capacity to deliver commercial clinical trials at pace through the VPAG Investment Programme. The national network of Commercial Research Delivery Centres has grown, with 21 centres now complemented by a further 14 in primary care, strengthening delivery across both hospital and community settings.⁹¹ Around £50 million of capital investment has supported upgraded infrastructure across NHS organisations in England⁹², alongside targeted funding to improve the efficiency of trial set-up, including pharmacy capacity. New commercial research fellowships have also been established and are now being expanded across the UK.

Next steps: Over the next year, we will continue to scale capacity across the UK, with further capital investment in NHS organisations, including in primary care settings. Additional funding will strengthen key enablers of delivery, including pharmacy, radiology and the research workforce. Together, this will support faster, more efficient commercial trial delivery and reinforce the UK's attractiveness as a destination for global clinical research investment.

Action 5: Substantially enhance the UK Research and Innovation offer to BioTech and MedTech SMEs. **[UK]**

SRO: Director, Life Sciences, Innovate UK

Progress: We have begun to mobilise UKRI's life sciences offer, as part of its wider R&D investment and in support of the Industrial Strategy, strengthening alignment across funding, capability and support for high-potential SMEs. Innovate UK has published a new prospectus⁹³ and realigned its operating model to prioritise growth sectors, including life sciences, with UKRI priority programmes improving coherence across the system. Early delivery includes a £25 million SME-led R&D competition⁹⁴ enabling a more joined-up approach to supporting companies to grow and commercialise.

Next Steps: Over the next year, we will deepen this approach by building a more coherent end-to-end translational pipeline across UKRI and strengthening alignment with the National Institute for Health and Care Research. This will include scaling support for high-potential companies through coordinated funding, partnerships and access to capital, alongside further competitions, accelerator programmes and a more integrated approach to account management, ensuring UK companies are better supported to start, scale and grow.

Delivering applied research and supporting companies to invest in R&D at scale in the UK

Action 6: Substantially enhance the National Institute for Health and Care Research offer to BioTech and MedTech SMEs to develop and evaluate high value innovation, including new digital connectivity to increase the speed and scale of real-world evaluations of AI. **[England]**

SRO: Director, Science, Research and Evidence, Department of Health and Social Care

Progress: We have strengthened the National Institute for Health and Care Research offer to support the development and real-world evaluation of high-value innovation. The Innovation Catalyst has been established as a new delivery mechanism, shaped through engagement across the health and care system, with the first funding call launching this year.⁹⁵ In parallel, the AI Research Screening Platform has entered its build phase, working with a small number of sites, including EDITH (Early Detection using Information Technology in Health), to develop a scalable approach to real-world evaluation of AI technologies. New Strategic Infrastructure Partnerships are also being established to strengthen real-world evidence generation and support adoption in practice.

Next steps: Over the next year, we will move from design into delivery, with initial Innovation Catalyst projects commencing and further support introduced across key development pathways. The AI Research Screening Platform will be tested and scaled from early site-based pilots, enabling more efficient evaluation of emerging technologies. Strategic Infrastructure Partnerships will also be expanded to strengthen system-wide capability in evidence generation and adoption, ensuring a more integrated route for innovators to develop, evaluate and deploy new technologies.

Delivering applied research and supporting companies to invest in R&D at scale in the UK

Action 7: Establish the national Health Data Research Service **[England and UK-wide collaboration]**

SRO: CEO, Health Data Research Service

Progress: We have taken forward the establishment of the Health Data Research Service (HDRS) as a key national capability to unlock the value of UK health data, with strong leadership in place following the appointment of Baroness Nicola Blackwood as Chair and Dr Melanie Ivarsson as Chief Executive. In June 2026, HDRS was formally incorporated as a government owned company, and has now established its company board, including the appointment of key interim Non-Executive Directors to steer HDRS' delivery. The company has also established a Four Nations Council, to embed collaboration to shape and support HDRS delivery, in line with its UK-wide mandate. Since January, the CEO has met with >200 stakeholders, from across NHS, charities, academics, life sciences companies, patients and the public to inform the strategy and roadmap for HDRS, which is currently under development.

Next steps: Over the next year, HDRS will move from set up into delivery including early investment in technology transformation and data driver projects, building its senior leadership team and establishing its core operating model. A strategic roadmap will be published setting out the approach to delivering an initial operating capability, with further rollout to follow. In parallel, policy and legislative reforms to improve data access will be progressed, ensuring HDRS is supported by a clear and enabling system framework. Together, this will support a step change in how health data is accessed and used for research, innovation and patient benefit.

Action 8: Government will use a combination of policy and legislative change to speed up access to health data for research and other secondary purposes, streamlining governance processes to maintain core safeguards while operating in a more efficient way. **[UK]**

SRO: Director, Joint Digital Policy Unit, Department of Health and Social Care

Progress: We have strengthened the policy and legislative foundations for improved access to health data for research and innovation. Provisions to support the development of a single patient record have been translated into draft legislation for the NHS Bill, providing a clearer and more coherent framework for data use across the system. In parallel, policy work has advanced on reforming access to confidential patient information for research, alongside new directions to expand consented data cohorts. Together, this is laying the groundwork for a more streamlined and effective data ecosystem.

Next steps: Over the next year, we will move into delivery, establishing the legislative and governance framework needed to enable more efficient and secure access to health data. This includes progressing the NHS Bill and advancing reforms to data governance, alongside the development of the Health Data Research Service. Together, these changes will support faster access to data for research and innovation, helping the UK better harness its data assets to drive investment, discovery and improved patient outcomes.

Delivering applied research and supporting companies to invest in R&D at scale in the UK

Action 9i: Expand and enhance the UK's consented health research datasets and develop the cutting-edge infrastructure needed to deliver a comprehensive genomics ecosystem, maximising patient benefit, with the potential for genomics to contribute to half of all healthcare interventions by 2035.

Our Future Health [UK]

SRO: Director, Office for Life Sciences

Progress: Our Future Health is making progress against the 2030 recruitment target, having reached over 2 million participants who have consented to take part and completed baseline health questionnaire, continuing to create one of the world's largest and most diverse health research cohorts.⁹⁶ Over 1.5 million participants have had their clinical measurements taken,⁹⁷ which includes body size and circulatory function. Genotyped and imputed data for over 750,000 participants are now available through the Trusted Research Environment,⁹⁸ and this is supporting over 50 active research studies.⁹⁹

Next steps: Over the next year, Our Future Health will continue to expand towards over 3 million consented participants and 1.75 million full participants by March 2027, maintaining cohort diversity as a priority. NHS data linkage will be strengthened to 2.5 million participants, including integration of primary care records, and the Trusted Research Environment will be enhanced to enable broader and faster access for researchers, with genomic data scaling to 1 million participants. We will begin returning personalised health insights to 750,000 participants and expand recontact capability, targeting enrolment of 1,000 participants into commercial clinical trials.

Action 9ii: Expand and enhance the UK's consented health research datasets and develop the cutting-edge infrastructure needed to deliver a comprehensive genomics ecosystem, maximising patient benefit, with the potential for genomics to contribute to half of all healthcare interventions by 2035. **UK Biobank [UK]**

SRO: Executive Chair, Medical Research Council

Progress: Sample supply for the main phase of the proteomics project¹⁰⁰ commenced in August 2025, with over 438,000 samples supplied to the close of April 2026 (73% complete).¹⁰¹ The industry consortium has completed proteomic measures on over 290,000 samples, with data returned on the first 175,000 of these measures.¹⁰² UK Biobank is undertaking QC of the data prior to data linkage by consortium members, representing the start of analysis and commencement of the short 9-month period of exclusive access.

Next Steps: Subject to business case approval, the consortium will commence Phase 2 proteomic measures in July 2026 to ensure completion by early 2027 (including assay and data QC) ahead of expiration of assay reagents. In support of this, UK Biobank will continue to ship monthly batches of the remaining samples through to August 2026. The timing for the analysis and subsequent public release of proteomics data measures (following the exclusivity period) is currently subject to review, noting the availability of UK Biobank's Research Analysis Platform is currently paused whilst corrective actions are taken to address security concerns.

Delivering applied research and supporting companies to invest in R&D at scale in the UK

Action 9iii: Expand and enhance the UK's consented health research datasets and develop the cutting-edge infrastructure needed to deliver a comprehensive genomics ecosystem, maximising patient benefit, with the potential for genomics to contribute to half of all healthcare interventions by 2035.

Genomics England [UK]

SRO: Director, Science, Research and Evidence, Department of Health and Social Care*

Progress: The Generation Study, a partnership between the NHS and Genomics England, is supporting the Government's ambition to introduce genomic newborn sequencing across the NHS. Over 70,000 newborns have been enrolled, with more than 50,000 results returned to families.¹⁰³ In 2025/26, approximately 45,000 whole genomes were sequenced through the NHS Genomic Medicine Service, underpinned by Genomics England's clinically accredited national digital and information systems.¹⁰⁴ Since 2021, 195,000 whole genomes have been sequenced and Genomics England aim to reach 200,000 by July 2026.¹⁰⁵ Subject to patient consent, these data are added to the National Genomic Research Library, connecting clinical care with research and enabling more than 5,000 new diagnostic discoveries to be returned to the NHS.¹⁰⁶

Next Steps: Genomics England will complete sequencing for the Generation Study and begin final evaluation. We will also mobilise the new Adults programme, which will sequence up to 150,000 adults to evaluate the role of genomics in routine preventative care. We will launch the next version of the Secure Research Environment and begin migrating approved users, enabling more effective access to and analysis of de-identified data in the National Genomic Research Library as data volumes and complexity grow. We will also complete discovery work for innovative cancer research approaches, including the use of AI and support for clinical trials.

Delivering applied research and supporting companies to invest in R&D at scale in the UK

Action 9iv: Expand and enhance the UK's consented health research datasets and develop the cutting-edge infrastructure needed to deliver a comprehensive genomics ecosystem, maximising patient benefit, with the potential for genomics to contribute to half of all healthcare interventions by 2035. **NHS Genomics Medicine Service [England]**

SRO: Chief Scientific Officer, NHS England

Progress: Significant progress has been made in expanding the NHS Genomics Medicine Service in England, with over 850,000 genomic tests delivered through the NHS Genomic Medicine Service in 2025 to 2026¹⁰⁷, including 11,000 circulating tumour DNA tests for non-small cell lung cancer and 3,200 for advanced breast cancer.¹⁰⁸ Over 45,000 whole genomes have been sent for sequencing, which includes 3,200 for cancer and 42,000 for rare and inherited disease.¹⁰⁹ A further 20 gene targets have been added to cancer panels to support access to clinical trials.¹¹⁰ Delivery is being strengthened through the new NHS Genomic Medicine Service operating model and the procurement of NHS Genomic Medicine Service Lead Providers has now concluded, with all providers identified and contractual arrangements in the final stages of completion. Nine NHS Genomic Networks of Excellence launched from April 2026, covering priority areas including pharmacogenomics, cancer and rare disease. Work continues to develop the data and digital infrastructure including a digital National Genomic Test Directory, which was launched for public testing in April 2026, and work is ongoing to develop the Unified Genomic Record.¹¹¹

Next Steps: Over the next year, we will complete contracting and implement the new NHS Genomic Medicine Service delivery model. The Genomic Networks of Excellence will begin delivering outputs to inform commissioning decisions, while the Unified Genomic Record progresses to private beta in Q1 2026 to 2027, strengthening the infrastructure needed to support a comprehensive genomics ecosystem.

Prioritisation, governance, accountability, and incentives

Action 10: The Government will shift investment in health R&D with a focus on primary and secondary prevention and Multiple Long-Term Conditions (MLTCs). **[UK]**

SRO: Chief Scientific Advisor, Department of Health and Social Care

Progress: The NIHR Strategic Public Health Oversight Group (S-PHOG) has mobilised to begin development of a dedicated Public Health and Prevention strategy, which will provide cross-NIHR coordination for investment in prevention research for the next 3-5 years. DHSC and the NIHR have finalised an approach to coding primary prevention research and are working with UKRI colleagues to define secondary prevention. Agreeing shared definitions will enable consistent tracking of investment in prevention across funders. UKRI, NIHR and UK Prevention Research Partnership (UKPRP) partnered to deliver the Population Health Improvement UK (PHI-UK) Prevention Research Conference in March 2026¹¹², to build further connections across the UK prevention research landscape.

Next steps: The NIHR S-PHOG has established four working groups and appointed relevant leads. Ahead of Summer 2026, working group leads will refine group membership and develop plans for activity. The NIHR is in the process of testing an AI-led approach to coding secondary prevention, refining inclusion criteria and testing sensitivity to finalise a definition for secondary prevention by September 2026. NIHR colleagues will share this with UKRI colleagues to support the development of metrics and shared criteria for reporting prevention spend across funders.

Action 11i: The Government will promote closer coordination and collaboration across UK health and Life Sciences research funders – creation of a UK-wide research portfolio database and management tool. **[UK]**

SRO: Executive Chair, Medical Research Council

Progress: We have made strong progress in improving coordination across UK health and life sciences research funders. Work has advanced to establish a UK-wide research portfolio database, led by Office for Strategic Coordination of Health Research (OSCHR), to enable a more coherent view of public research investment. This includes development of a machine learning tool to automate Health Research Classification System coding, now published as an open resource, and progress in designing a publicly accessible platform to analyse and visualise funding data. A contract has also been awarded to develop the database and associated tools.

Next steps: Over the next year, we will move into delivery, developing and launching the UK-wide research portfolio database, including core capabilities for data entry, analysis and visualisation. We will expand data coverage across public funders and continue engagement through OSCHR to ensure system-wide adoption. This will support greater transparency, coordination and strategic alignment of research funding across the UK.

Prioritisation, governance, accountability, and incentives

11ii: The Government will promote closer coordination and collaboration across UK health and Life Sciences research funders – single searchable database of clinical trial activity. **[UK]**

SRO: Chief Scientific Adviser, Department of Health and Social Care

Progress: We have continued to strengthen transparency and coordination across clinical research activity. The NIHR provides access to ScanMedicine, a searchable database of UK clinical trials with the ability to explore global activity, alongside the Be Part of Research service, which enables participants to find and join studies across the UK. Work has also progressed to ensure the UK maintains a robust and transparent public registry for clinical research.

Next steps: Over the next year, we will build on these foundations by promoting and expanding the use of existing platforms, improving visibility of clinical trial activity for researchers, industry and participants. This will support greater transparency, improve study recruitment and strengthen coordination across the clinical research ecosystem.

Action 12: The Government will update the National Institute for Health and Care Research's governance model and require the National Institute for Health and Care Research to work to a dual health and growth mandate, driving focus on activity which is growth-maximising alongside improving health outcomes, building a strong foundation for future research. **[England]**

SRO: Chief Scientific Adviser, Department of Health and Social Care

Progress: NIHR continues to deliver significant impact for both health and the economy, on average there is an estimated £13 return for every £1 invested.¹¹³ One avenue for these returns is commercial clinical trial activity: 623 new commercial contract interventional studies were added to the NIHR's RDN portfolio in 2025, with an average monthly recruitment to commercial contract interventional studies of 1,640 participants in 2025.¹¹⁴ To further embed the dual focus, a National Institute for Health and Care Research Council has been established to provide strategic direction and assurance to Ministers on delivery against its objectives. The Council brings together expertise across investment, innovation, impact and inclusion, strengthening oversight of NIHR's contribution to both improved health outcomes and economic growth. An open recruitment for Council members has been ongoing with appointments expected imminently.

Next steps: Over the next year, the National Institute for Health and Care Research will continue to deliver high-impact research aligned to its strengthened mandate, with the National Institute for Health and Care Research Council providing ongoing strategic direction and oversight. This will support a sharper focus on activities that maximise both health and economic outcomes, ensuring NIHR's portfolio continues to drive innovation, attract investment and deliver benefits for patients and the wider economy.

Pillar 2 - Making the UK an Outstanding Place in which to Start, Grow, Scale and Invest

Access to finance

Action 13: The Life Sciences sector will benefit as the British Business Bank commits an additional £4 billion of Industrial Strategy Growth Capital to support investment and growth in the Government's Industrial Strategy growth-driving sectors (IS-8). **[UK]**

SRO: CEO, British Business Bank

Progress: £379 million of public capital has been committed by the British Business Bank to specialist life sciences funds and companies over the last year. This has included £308 million backing for specialist fund managers, and £71 million directly into life sciences companies.¹¹⁵ Over the past year, the British Business Bank initially prepared to deliver from its expanded capital base, including portfolio strategy development, market engagement, and recruitment. The Bank has now increased the pace and scale of life sciences deployments, recently including the largest ever Bank fund commitments, cornerstoning £100 million to Apposite Healthcare Growth (April 2026)¹¹⁶ and £50 million to Epidarex (January 2026).¹¹⁷ Direct investments include £12 million to Cytospire Therapeutics (May 2026)¹¹⁸ and £5 million to IMU Biosciences (June 2026)¹¹⁹. This reflects acceleration in its activity across sectors: for example, across its direct VC investment (spanning life sciences, deep tech, AI, and fintech), the Bank completed 18 new investments plus 18 follow-on investments in FY25/26, compared to 12 investments the year before. Total investments were up 2.5 times from £75 million to £188 million year-on-year, and are expected to scale to over £400 million this year. The investment pipeline across direct and fund activity in Life Sciences is reported as healthy.¹²⁰

Next steps: Over the next year, deployment will scale further across the Life Sciences sector, using both fund and direct investment channels. Activity will focus on progressing the existing pipeline, making new commitments and accelerating investment where market conditions allow. The Bank will continue to work closely with government and market partners to attract additional private capital, supporting the growth of innovative UK companies and strengthening the UK's position as a leading destination for life sciences investment.

Access to finance

Action 14: Crowd in additional global investment into UK Life Sciences by publishing the British Business Bank's VC investment return data. [UK]

SRO: CEO, British Business Bank

Progress: During the past year, the British Business Bank has developed a publication analysing returns from its venture capital investments in life sciences, led internally and subject to independent peer review. The draft has progressed through review stages, with comments returned and revisions underway. The publication is intended to improve transparency on UK life sciences investment performance, supporting international investor confidence and evidence-based discussion of UK venture capital outcomes.

Next steps: The Bank expects to publish the peer-reviewed analysis, subject to completion of revisions and final approvals. Following publication, the Bank will use the findings to support engagement with global investors and stakeholders, complementing broader efforts to attract capital into UK life sciences. Impact will be assessed over time through changes in investor engagement.

Action 15: Develop dedicated support for Life Sciences SMEs to export. [UK]

SRO: Director, Office for Life Sciences

Progress: In a challenging global trading environment, government has taken steps to strengthen support for life sciences exports and improve access to international markets. This includes securing Free Trade Agreements with India, South Korea and the Gulf Cooperation Council (GCC) as well as the landmark UK-US Pharmaceuticals Arrangement, ensuring that UK pharmaceuticals exports to the US (worth at least £5 billion a year)¹²¹ will be tariff free and that medical technology exports will face no additional tariffs. Alongside this, the Business Growth Service digital offer on business.gov.uk has been launched to support companies at all stages of exporting, complemented by enhanced in-market support through growth advisers embedded in priority markets. Government has also supported UK companies to engage internationally through major trade events. Together, this is strengthening the UK's export offer and supporting companies to access global opportunities.

Next steps: Over the next year, we will build on this progress by strengthening the UK's offer to life sciences exporters, working closely with industry to identify where targeted support can unlock the greatest opportunities. This will include enhancing the digital offer on business.gov.uk and exploring more tailored interventions for life sciences companies. We will continue to work in partnership with industry and trade associations to support companies to scale internationally and maximise the UK's global export potential.

Skills

Action 16: Build a training and skills system that delivers a diverse and highly skilled Life Sciences workforce. **[England]**

SRO: Deputy Chief Executive, Skills England*

Progress: We have strengthened the foundations of a more responsive, industry-led skills system for life sciences, including closer engagement between Skills England and employers to better understand workforce needs. The removal of funding for Level 7 apprenticeships has impacted the sector, underlining the importance of aligning the skills system with the needs of high-growth industries. New initiatives to expand technical education, including Technical Excellence Colleges¹²² and more flexible use of the Growth and Skills Levy¹²³ are improving the offer in priority areas relevant to Life Sciences such as advanced manufacturing and AI leadership.

Next steps: Over the next year, the Skills Needs Assessment and Jobs Plan will set a clearer direction for life sciences skills, informed by continued engagement with industry and devolved administrations. We will work with employers to shape training provision, including higher-level technical routes, and strengthen alignment between education providers and sector needs. Ongoing reforms to apprenticeship assessment will support a more flexible system capable of meeting the needs of a growing life sciences sector.

Action 17: Maximise the use of existing programmes and deliver specific new programmes to improve sector-specific skills in identified high-priority areas. **[England]**

SRO: Director, Office for Life Sciences

Progress: We have taken forward targeted action to strengthen skills in priority areas across the life sciences sector. OLS has worked with Skills England, Department for Education (DfE) and industry partners to better understand skills gaps and align provision to sector needs. This includes support for initiatives such as RESILIENCE, which has established a UK-wide medicines manufacturing skills programme training over 2,275 individuals¹²⁴, alongside the Industry Skills Accelerator, which has created four new apprenticeship pathways.¹²⁵ Work has also progressed to embed life sciences priorities across wider government activity, supported by joint analysis to strengthen the evidence base for future skills planning.

Next steps: Over the next year, we will publish the sector Jobs Plan to support the projected 66,000 additional life sciences jobs needed by 2035 in priority occupations.¹²⁶ We will then support delivery of its commitments, strengthening coordination across government, industry and education providers. This will include expanding relevant training routes, improving employer engagement and ensuring life sciences is fully reflected in wider system reforms. We will also work across government to maximise the impact of existing programmes and funding, supporting increased participation and a more responsive, sustainable talent pipeline. Existing initiatives, including RESILIENCE, will continue to scale through a mix of commercial and grant-funded activity.

Skills

Action 18: Promote UK strengths to exceptional international Life Sciences talent through the Government's Global Talent Taskforce initiative and ensure the visa system enables the movement of world class talent. **[UK]**

SRO: Director for Global Talent, Department for Business and Trade

Progress: Global Talent Taskforce (GTT) is strengthening capability through enhanced executive search partnerships, recruitment of a senior talent strategist and regional talent leads. Of GTT's pipeline of 85 individuals, 5 referrals are in the life sciences sector, all of whom have reached the 'cleared for pitching' stage.¹²⁷ The Global Entrepreneur Programme (GEP) has joined the Office for Investment (OFI), bringing DBT talent services together. In FY25/26, it has supported 11 Life Sciences/HealthTech businesses to land and scale from the UK.¹²⁸ Delivery of the Davos package is on track, including visa fee reimbursements scheme for scale-ups and a fast-track sponsor licence service.

Next steps: Key delivery milestones included the launch of the visa fee reimbursement scheme for scale-ups and the Office for Investment (OFI) referral function on 10 June, supported by targeted promotion at London Tech Week. The Global Talent Hub also convened a workshop with 22 life sciences companies on 20 May 2026 to identify barriers to recruiting overseas talent and inform future delivery. GTT targets by the end of FY26/27 are a referral pipeline of at least 500 and 100 successful conversions. Overall pipeline growth will remain a priority with ambitions to increase life sciences referrals and conversions through FY26/27. GEP currently have 24 life sciences companies in their pipeline for FY26/27, and are expecting 15 to land by close of the financial year.¹²⁹ At the start of FY26/27, GEP have recruited a Specialist life science Dealmaker, tasked with supporting life science businesses to land and scale from the UK.

Manufacturing

Action 19: Deliver the £520 million Life Sciences Innovative Manufacturing Fund (LSIMF) pipeline. **[UK]**

SRO: Director, Office for Life Sciences

Progress: We have made strong progress in deploying the LSIMF to secure globally mobile investment in the UK. To date, £87 million in grant funding has been committed to nine projects, unlocking £657 million in private investment. These projects will create 272 jobs and safeguard a further 1,030 across the UK, supporting the production of advanced therapies, generics and cancer treatments.¹³⁰ This has been complemented by the launch of the Life Sciences Large Investment Portfolio, providing a more strategic and streamlined route for securing major investments over £250 million.

Next steps: Over the next year, we will continue to scale delivery of the LSIMF, progressing applications through a strong and growing pipeline, including further investment opportunities. We will continue to promote the UK as a destination for manufacturing investment and use both LSIMF and the Large Investment Portfolio to support major projects. Together, this will strengthen the UK's manufacturing base, improve resilience and support long-term growth in the life sciences sector.

Action 20: Continue to invest at scale in Life Sciences manufacturing innovation. **[UK]**

SRO: Director, Life Sciences, Innovate UK

Progress: We have strengthened delivery of life sciences manufacturing innovation, accelerating the development and adoption of new technologies across the sector. Through the Strength in Places Fund, nine Grand Challenge projects have been launched under the Sustainable Medicines Manufacturing Innovation Programme, awarding over £61 million to 73 participants and leveraging a further £23 million of industry co-investment¹³¹. Additional funding has supported critical enabling capability in areas such as regulation, standards and data. In parallel, the Transforming Medicines Manufacturing programme has progressed delivery, with early evidence of impact and new funding enabling the launch of the first 'Labs of the Future' competition.¹³²

Next steps: Over the next year, we will build on this momentum, completing the current phase of Transforming Medicines Manufacturing and strengthening the evidence base on impact. A pipeline of new investments will be delivered, including further competitions focused on future supply chains and medicines manufacturing innovation, alongside continued support for enabling capabilities. This will deepen collaboration with industry and accelerate the translation of innovation into advanced, resilient and future-ready manufacturing across the UK.

Net Zero

Action 21: Continue to refine the implementation of the NHS Net Zero Roadmap. **[England]**

SRO: Chief Commercial Officer, NHS England*

Progress: We have made progress in refining the implementation of the NHS Net Zero Roadmap in close partnership with industry. Engagement with suppliers has shaped a proportionate and internationally aligned approach to decarbonisation, supporting the NHS to meet its statutory obligations while maintaining competitiveness. A detailed market survey in 2025 engaged over 1,000 suppliers, with strong levels of support and broad participation from SMEs and life sciences companies¹³³. This has informed the development of delivery plans and policy design. The UK has also demonstrated international leadership, with progress on supply chain emissions highlighted by the World Health Organization.

Next steps: Over the next year, focus will shift to supporting delivery of the next milestones in the roadmap. This will include targeted engagement and guidance for suppliers, supported by tools such as the Evergreen Sustainable Supplier Assessment, to strengthen readiness across the system. Further work will also be taken forward with industry to refine future policy approaches, including product-level emissions reporting. Together, this will ensure the transition to Net Zero is delivered in a way that is practical, proportionate and aligned with industry capability.

High-value partnerships

Action 22: Land at least one major strategic partnership per year over the spending review period. **[UK]**

SRO: Director, Office for Life Sciences

Progress: We have made strong progress in delivering strategic partnerships that drive growth and health outcomes. OLS remains on track to deliver its commitment of securing at least one major partnership each year. Since publication of the Plan, a cross-government Life Sciences Partnerships Strategy has been established, alongside a pipeline of new opportunities. This includes a landmark collaboration with Lilly, delivering the £85 million Obesity Pathway Innovation Programme,¹³⁴ and the launch of a market engagement exercise to scope a strategic partnership in respiratory disease.

Next steps: OLS will continue to implement the Life Sciences Partnerships Strategy, shifting to a proactive footing which prioritises partnership opportunities that will have the biggest impact on health outcomes, investment into the UK economy and benefits for the wider life sciences ecosystem. As part of this work, we will continue to explore opportunities for a strategic partnership in respiratory disease, building on the market engagement exercise kicked off in early 2026.

High-value partnerships

Action 23: Establish a dedicated service to support 10-20 high-potential UK companies to scale, invest, and remain domiciled in the UK. **[UK]**

SRO: Director, Office for Life Sciences

Progress: We have established the Life Sciences Scale-Up Service to support high-potential UK companies to grow, scale and remain in the UK. As part of this, OLS is meeting its target to directly support 10-20 of the UK's most promising scale-ups through targeted account management. This has already generated a number of opportunities for growth and enabled collaboration between scale-ups and key government and arm's length bodies. The Service has also supported international expansion, including facilitating participation in high-profile trade missions, helping companies access global markets and investment opportunities. Based on a recent survey of supported companies, 88% of respondents reported being satisfied with the Scale-Up Service to some degree, including 63% who were very satisfied with their engagement.¹³⁵

Next steps: Over the next year, we will deepen support through the Scale-Up Service, identifying further opportunities to unlock growth, attract investment and support expansion into global markets. We will work with key delivery partners across the system, including MHRA, NIHR, NICE and NHS England, to provide a more coordinated and tailored offer to high-potential companies. Together, this will strengthen the UK's ability to scale innovative life sciences businesses and retain the benefits of growth within the UK economy.

High-value partnerships

Action 24: Empower the Health Innovation Network to drive innovation and investment at scale by strengthening support. **[England]**

SRO: Director, Office for Life Sciences

Progress: The Health Innovation Network (HIN) continues to accelerate the development, adoption and spread of innovation across the NHS, bridging national priorities, industry and local systems. In 2025–26, HIN activity has supported more than 1,600 innovations, benefitted more than 2.1 million patients,¹³⁶ created or safeguarded 1,500 jobs, and leveraged around £1.5 billion in investment.¹³⁷ The Respiratory Transformation Partnership, launched in March, demonstrates this impact, bringing together OLS, the NHS and four major industry partners and leveraging over £4 million of private investment to improve outcomes.¹³⁸ Delivery capability has also been strengthened through increased funding, including a new £60 million OLS commitment over three years.¹³⁹

Next steps: Over the next year, the HIN will play a central role in delivery, with activity expected to benefit a further one million patients, support hundreds of innovators and leverage significant additional investment. Delivery will be strengthened through a federated leadership model and a focus on productivity and the three shifts, including national programmes in priority clinical areas and support for NHS App implementation. HINs will also support regional priorities, including adoption at scale through Secure Data Environments and the Federated Data Platform, while the Respiratory Transformation Partnership continues to scale delivery into community settings.

Pillar 3 - Driving Health Innovation and NHS Reform in England

Ensuring our regulatory and market access systems get innovation to the NHS fast

Action 25: Reduce unwarranted barriers to market entry, through faster, risk-proportionate, and predictable routes to regulatory approval. **[UK]**

SRO: CEO, Medicines and Healthcare products Regulatory Agency

Progress: We have made progress in reducing regulatory barriers and improving routes to market for innovative medical technologies, including advancing more risk-proportionate and predictable approaches. Support for innovators has continued through initiatives such as the AI Airlock, where four reports were published following Phase 1 in October 2025 and seven Phase 2 innovators were engaged between November 2025 and March 2026.¹⁴⁰ A public consultation on indefinite recognition of CE marked devices has also closed, with strong engagement from the health technology sector. In parallel, policy development has advanced to enable more flexible, internationally aligned regulatory approaches and to shape longer-term reforms to the UK's device regulation framework.

Next steps: Over the next year, we will move into delivery of key regulatory reforms, including introducing new legislation to establish more flexible and internationally aligned approval routes. This will include enabling greater reliance on trusted global regulatory systems and strengthening risk-proportionate approaches to patient safety. In parallel, we will continue to develop a future regulatory model that reduces barriers to innovation, alongside ongoing support for emerging technologies through initiatives such as the AI Airlock, creating a faster, more predictable and competitive regulatory environment.

Ensuring our regulatory and market access systems get innovation to the NHS fast

Action 26: Streamline market entry and ensure patients receive the most effective care, by ensuring NICE processes are timely, agile and transparent. **[England]**

SRO: CEO, National Institute for Health and Care Excellence

Progress: We have made strong progress in improving the timeliness and effectiveness of NICE decision-making, ensuring patients can access the most clinically effective care more quickly. NICE has advanced its Whole Lifecycle Approach, updating guidelines and guidance to reflect the latest evidence in areas including prostate cancer, heart failure and diabetes, supporting improved outcomes for millions of patients. For example, an updated heart failure guideline is expected to prevent up to 3,000 deaths and 5,500 hospital admissions each year in England.¹⁴¹ Timeliness has also improved significantly, with the median time from marketing authorisation to NICE recommendation reduced to 232 days, a 30% improvement on the previous year.¹⁴²

Next steps: Over the next year, we will continue to embed the Whole Lifecycle Approach, ensuring guidance is updated more rapidly as new treatments and evidence emerge. This will include incorporating more HealthTech recommendations into clinical guidelines and testing new approaches to reflect the availability of off-patent medicines. Work will also continue to improve NICE timeliness, including through digitisation and optimisation of processes, supporting faster patient access and contributing to the UK's ambition to be among the fastest countries in Europe for access to innovative medicines.

Action 27: Streamline market entry, through enhanced coordination between the MHRA and NICE. **[UK/England]**

SRO: CEO, Medicines and Healthcare products Regulatory Agency

Progress: We have made progress in aligning regulatory and market access pathways to accelerate patient access to new medicines. MHRA and NICE have launched an aligned pathway, enabling same-time regulatory and reimbursement decisions and bringing treatments to patients up to three to six months sooner.¹⁴³ A more integrated scientific advice service is also providing coordinated advice and clarifying evidence requirements earlier in development. Performance data shows that despite the improvement in median timeframes outlined under action 26, the mean time between regulatory decision and NICE guidance was 367 days in 2025 to 2026, compared to a baseline of 335 days in 2024 to 2025, reflecting a small number of outlier cases.¹⁴⁴ Work is underway to improve consistency and reduce timelines.

Next steps: Over the next year, we will scale delivery of the aligned pathway, with more products receiving same-time decisions. NICE will introduce ongoing monitoring and publication of timelines to support transparency and improvement. The integrated scientific advice service will also be expanded, supporting faster, more predictable adoption of innovative medicines.

Ensuring that all patients have access to clinically and cost-effective innovations

Action 28: Reduce friction in the system to optimise access and uptake of new medicines so the most clinically and cost-effective can reach patients faster. **[England]**

SRO: Director, Medicines Value and Access, NHS England*

Progress: We have made progress in reducing system friction to improve access to clinically and cost-effective medicines. A cross-government review of pricing access and uptake policy is underway in partnership with industry, alongside work to improve access for complex to launch products such as multi-indication medicines. NHS England has also strengthened uptake of off-patent medicines, with the latest biosimilar launch in December 2025 (afibercept 2mg) achieving 88% uptake within 6 months.¹⁴⁵ In parallel, work to develop a Single National Formulary has progressed, supporting more consistent adoption and reduced variation across the NHS.

Next steps: Over the next year, we will build on this progress by implementing findings from the Commercial Environment Review and strengthening the NHS commercial framework, including improving access in primary care. The Single National Formulary will move into build and testing, with early adopter sites covering 48% of Integrated Care Boards initiating categorisation work on Local Formularies, helping to reduce variation and support adoption at scale.¹⁴⁶ Together, this will enable faster, more consistent access to effective treatments for patients.

Action 29: Streamline access and adoption of MedTech by reducing duplication and introducing low-friction procurement and contracting mechanisms. **[England]**

SRO: Director, Medical Technologies, Department of Health and Social Care

Progress: We have made progress in strengthening the adoption and spread of high-impact health technologies across the NHS. The National HealthTech Access Programme was launched, including initial technologies such as capsule sponge for oesophageal cancer and AI tools for prostate and breast cancer referred to NICE. New Value Based Procurement guidance has also been introduced, shifting the focus from lowest cost to value and outcomes across both national frameworks and local NHS procurement. Together, these changes are improving how innovative technologies are assessed, procured and adopted across the system.

Next steps: Over the next year, we will build on this progress, focusing on accelerating adoption and scale in priority areas. More high-impact health technologies will be selected for the National HealthTech Access Programme. Key enablers will include the introduction of an Innovator Passport to streamline decision-making, and the development of a HealthStore to provide a centralised route for accessing digital solutions. These measures will support faster and more consistent uptake of effective technologies across the NHS, improving patient outcomes and supporting innovation.

Ensuring that all patients have access to clinically and cost-effective innovations

Action 30: The Government will place a growth mandate on NHS commercial activity including NHS Supply Chain, and within the Medicines Procurement and Supply Chain Frameworks. **[England]**

SRO: Chief Commercial Officer, NHS England*

Progress: We have made progress in embedding the Growth Mandate across NHS commercial activity, strengthening the role of procurement and commercial decision-making in supporting innovation and growth. This includes developing the MedTech Growth Accelerator to support SMEs and workforce placements, alongside early work on investment-linked value-based pricing, including the identification of priority areas. Procurement reforms have also advanced, with publication of an SME Action Plan and the integration of growth objectives within wider social value approaches. Together, these changes are beginning to align NHS commercial activity more closely with economic growth and innovation priorities.

Next steps: Over the next year, focus will shift to delivery and scaling. The MedTech Growth Accelerator will launch, supporting SMEs and generating early impact. Investment-linked value-based pricing will enter a pilot phase, informed by close engagement with industry and a developing commercial strategy. Additionally, DHSC/NHSE's Innovative Procurement Taskforce will rapidly test commercial and procurement hypotheses that can be applied across HealthTech spend to support rapid uptake of innovations.¹⁴⁷ Procurement reforms will be embedded through updated national guidance and pilot tenders, with a focus on increasing SME participation and evaluating early impact. This will support a more growth-oriented NHS commercial system that drives innovation, investment and patient benefit.

Action 31: Strengthen innovation metrics for medicines and MedTech through an updated and expanded Innovation Scorecard. **[England]**

SRO: Director, Office for Life Sciences

Progress: We have continued to strengthen transparency on the uptake of innovation through the Innovation Scorecard. The Scorecard has been expanded to cover 18 medicine groupings, with improved estimates of adoption across the system. Further work has progressed to explore integration of sub-national data, reflecting stakeholder demand for greater visibility at a local level. The Scorecard continues to be published on a bi-annual basis, providing a consistent and reliable view of performance. Governance arrangements have been temporarily streamlined to maintain delivery momentum.

Next steps: Over the next year, we will further expand the scope of the Scorecard, including exploring the integration of MedTech metrics and sub-national data on uptake. Governance structures will be re-established to support continued development and oversight, alongside engagement with partners across government and industry. This will ensure the Scorecard continues to provide a robust, transparent and increasingly comprehensive view of how innovation is adopted across the NHS.

Ensuring that all patients have access to clinically and cost-effective innovations

Action 32: Deliver the ambitions of the Government's Healthcare Goals programme across Addiction, Cancer, Dementia, Mental Health, and Obesity, with continued significant government funding. **[UK]**

SRO: Director, Office for Life Sciences

Deliver the ambitions of the Government's Healthcare Goals programme across Addiction, Cancer, Dementia, Mental Health, and Obesity, with continued significant government funding.

Progress:

- The Healthcare Goals programme has:
- Launched a £50 million investment into strengthening the UK's mental health research and innovation¹⁴⁸.
- Launched a £20 million competition to catalyse innovation for tackling drug and alcohol addiction healthcare challenges¹⁴⁹.
- Launched an over £10 million Research Leadership Programme to support the next generation of leaders in addiction research.¹⁵⁰
- Funded a £650,000 Research Design Phase for the Scotland CardioMetabolic Impact Study.¹⁵¹
- Launched an £85 million UK-wide programme to expand access to obesity care through pharmacies and community-based routes, and announced successful projects.¹⁵²
- Supported real world evidence for cancer medtech by funding: £1.5 million real-world evaluation of Skin Analytics' DERM AI tool.¹⁵³
- £7.2 million for an evaluative platform trial of multiple blood-based Multi-Cancer Detection tests in the NHS.¹⁵⁴

The Healthcare Goals programme will:

- Continue to support the establishment of the Neurodegeneration Initiative (NI), which has now been independently established as 'The BARBARA Alliance', and appointed an independent Board of Trustees. Government has commissioned The BARBARA Alliance to deliver a £2.75m proof of concept for its flagship programme 'BARBARA' - Brain Ageing Registry for Biomarkers, Access to trials, Research, and Adoption. We will continue to work with The BARBARA Alliance to support the securing of public, private and philanthropic partners to grow its portfolio of investments.
- Over the next 12 months, the Obesity Pathway Innovation Programme will move into delivery, with projects mobilising from June 2026.
- Launch a 'wrap-around' service for industry, linking companies with expertise in mental health trial delivery, lived experience partners and offering wider strategic advice through the Mental Health Goals Alliance Management Team.

Ensuring that all patients have access to clinically and cost-effective innovations

- Launch the £26 million Early Cancer Diagnosis Research Fund (ECDRF) funding competition from September 2026.
- Launch a Cancer Clinical Trials Accelerator in collaboration with the NIHR.
- Publish two reports with Ipsos UK on: addiction healthcare innovations research in the Criminal Justice System, and an Addiction Research Data Roadmap and begin delivery of recommendations.

Action 33: Establish Regional Health Innovation ‘Zones’ for large scale development and implementation of innovation, for scale-up across the health and care system. **[England]**

SRO: Director General, Commercial and Growth, Department of Health and Social Care*

Progress: Over the past year, government has developed the conceptual model for Regional Health Innovation Zones, including initial design parameters (e.g. minimum population scale and joint health–local government leadership). Early engagement has taken place across DHSC, NHSE and wider government (including HMT, DSIT, DBT and MHCLG), as well as with NHS leadership and industry bodies. There has been strong early interest from regions. Progress has been slower than planned due to limited central capacity, and further work is required to define governance, freedoms and support.

Next steps: Over the next year, government will consider the role of Regional Health Innovation Zones within the wider NHS reform and innovation landscape, including how best to strengthen incentives and accountability for adoption of innovation across the system. This will include decisions on prioritisation and resourcing across the portfolio.

Subject to these decisions, further work may be taken forward to refine the Zones model through engagement with NHS, local government, academic and industry partners. This could include progressing towards an Expression of Interest process and potential selection of an initial tranche of Zones.

Endnotes

1 This includes the following investments:

- Through the Life Sciences Innovative Manufacturing Fund (LSIMF), £87 million has been committed so far to nine projects, unlocking £657 million of private investment. Internal financial figures derived from grant funding agreements between OLS and grant-awarded companies.
 - [Department for Science, Innovation and Technology \(2026\), Vital medicines and new jobs in over £80 million for UK life sciences.](#)
 - [Wales Office \(2026\), Medicine production expansion comes as Welsh Secretary announces new trade programme.](#)
 - [Department for Science, Innovation and Technology \(2026\), UK and Japan strengthen science and technology ties.](#)
 - [Prime Minister's Office, 10 Downing Street \(2026\), Tens of thousands of new jobs and more than £18 billion boost to British economy as Prime Minister meets Japanese leader](#)
 - [HM Treasury, Office for Life Sciences, British Business Bank \(2026\), Reeves gets deals done at Davos.](#)
 - [Department for Science, Innovation and Technology \(2025\), UK regions given extra £20 million science and tech cash boost as new investment kicks off landmark growth summit.](#)
- [BBC News \(2026\), AstraZeneca announces 'major' UK investment.](#)
- [Boehringer Ingelheim \(2026\), Boehringer Ingelheim expands investment in computational innovation with new AI Accelerator in UK's Knowledge Quarter.](#)
- [FUJIFILM Biotechnologies \(2026\), FUJIFILM Biotechnologies Unveils Biomanufacturing and Process Development Expansion in the United Kingdom.](#)
- [Department for Science, Innovation and Technology \(2025\), Next-gen therapies for cancer, dementia and more fast-tracked with new facility.](#)
- [Convatec \(2025\), Convatec announces plans to invest more than \\$1 billion in R&D facilities – major expansions in the US and UK.](#)
- [Department for Science, Innovation and Technology \(2025\), Millions of vaccines to be made in Oxfordshire, and government unveils £50 million fund, in double boost for life sciences.](#)
- [Department for Science, Innovation and Technology \(2026\), Pioneering projects to transform obesity care, backed by £85 million from government and industry.](#)
- [Department for Science, Innovation and Technology \(2025\), £1 billion BioNTech investment sets way for jobs, growth, breakthroughs.](#)

- 2 [Department of Health and Social Care \(2026\), UK Clinical Research Delivery key performance indicators: data to May 2026](#). Average set-up time refers to the median time from application to first participant recruited for commercial interventional trials. The median time was 122 days between April 2025 and September 2025. The median time was 169 days between April 2024 and September 2024.
- 3 [Department for Science, Innovation and Technology, Department of Health and Social Care, Department for Business and Trade, Medicines and Healthcare products Regulatory Agency and National Institute for Health and Care Excellence \(2026\), NHS patients and British businesses to benefit from historic changes to medicines access following pharmaceutical partnership with USA](#).
- 4 [Medicines and Healthcare products Regulatory Agency \(2026\), Patients to get new medicines up to six months sooner under new joint MHRA-NICE approval process](#).
- 5 [National Institute for Health and Care Excellence \(2026\), Faster, fairer access to HealthTech under new national programme](#).
- 6 [Department for Health & Social Care \(2026\), Value based procurement national standard guidance for medical technology](#).
- 7 [Department for Science, Innovation and Technology, Department of Health and Social Care, Innovate UK, NHS England \(2025\), New help for patients battling obesity through pharmacies and community access](#).
- 8 [Department of Health and Social Care \(2026\), Asthma and COPD patients to receive better care closer to home](#).
- 9 [Office for National Statistics \(2025\), Business enterprise research and development, UK: 2024](#) and [Organisation for Economic Co-operation and Development, Business enterprise R&D expenditure by industry](#). Latest international data available is for 2023. UK data is sourced from the ONS and uses the 2023 figure for the pharmaceutical product group. This figure is compared to data for other European countries sourced from the OECD and uses 2023 figures for businesses where the industry orientation is “Manufacture of basic pharmaceutical products and pharmaceutical preparations”. OECD reports data on 15 European countries that is comparable to the UK data from the ONS.
- 10 [Office for Life Sciences \(2026\), Life sciences competitiveness indicators](#). Latest data available is for 2024. Performance should be considered alongside wider market conditions and investment data can be highly volatile year-on-year.
- 11 [European Federation of Pharmaceutical Industries and Associations \(2026\), Patients W.A.I.T indicator survey](#). Latest data available covers medicines that received marketing authorisation between 2021 and 2024. Data is only available for England and Scotland. Reporting excludes the following countries where data is indicated as unrepresentative. North Macedonia, ranked seventh for median time to availability by the Indicator Survey, is excluded from the ranking.
- 12 [Office for Life Sciences \(2026\), Life sciences competitiveness indicators](#). Latest data available is for 2024. Data compares the UK to 17 comparator countries which are listed in the FDI section of the accompanying user guide of the source publication. Performance should be considered alongside the strength of international competition, and FDI investments can also be highly volatile year-on-year.

- 13 [Office for Life Sciences \(2026\), Life sciences competitiveness indicators.](#)
- 14 [British Business Bank \(2025\), Small Business Equity Tracker.](#) Figure is derived from comparing US to UK VC investment in 2022-2024, on a GDP-adjusted basis.
- 15 [Department of Health and Social Care, Prime Minister's Office, 10 Downing Street, Department for Science, Innovation and Technology, Office for Life Sciences, and Office for Investment \(2025\), Prime Minister turbocharges medical research.](#)
- 16 [Department of Health and Social Care \(2026\), Government drives forward its 150-day clinical trial target.](#)
- 17 [Department of Health and Social Care \(2026\), UK Clinical Research Delivery key performance indicators: data to May 2026.](#) Average set-up time refers to the median time from application to first participant recruited for commercial interventional trials. The median time was 122 days between April 2025 and September 2025. The median time was 169 days between April 2024 and September 2024.
- 18 [Department of Health and Social Care \(2026\), UK Clinical Research Delivery key performance indicators: data to May 2026.](#) 73% of commercial interventional trials with known status met the 150 day target between April 2025 and September 2025 compared to 45% between April 2024 and September 2024.
- 19 Through the Life Sciences Innovative Manufacturing Fund (LSIMF), £87 million has been committed so far to nine projects, unlocking £657 million of private investment. Internal financial figures derived from grant funding agreements between OLS and grant-awarded companies.
 - [Department for Science, Innovation and Technology \(2026\), Vital medicines and new jobs in over £80 million for UK life sciences.](#)
 - [Wales Office \(2026\), Medicine production expansion comes as Welsh Secretary announces new trade programme.](#)
 - [Department for Science, Innovation and Technology \(2026\), UK and Japan strengthen science and technology ties.](#)
 - [Prime Minister's Office, 10 Downing Street \(2026\), Tens of thousands of new jobs and more than £18 billion boost to British economy as Prime Minister meets Japanese leader](#)
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 - [Department for Science, Innovation and Technology \(2025\), UK regions given extra £20 million science and tech cash boost as new investment kicks off landmark growth summit.](#)
- 20 [Department for Science, Innovation and Technology \(2026\), Vital medicines and new jobs in over £80 million for UK life sciences.](#)
- 21 [Medicines and Healthcare products Regulatory Agency \(2026\), MHRA expands AI Airlock programme with a £3.6 million funding boost over three years.](#)
- 22 [Medicines and Healthcare products Regulatory Agency \(2026\), MHRA announces proposals to improve access to world's best medical devices for patients and to boost economic growth in Britain's med tech sector.](#)

- 23 [National Institute for Health and Care Excellence \(2026\), Integrated Performance Report May 2026](#). Data is taken from the “median time between marketing authorisation and NICE recommendation (calendar days)” indicator.
- 24 [National Institute for Health and Care Excellence \(2025\), Updated guideline to increase access to treatments for early-stage chronic heart failure could reduce deaths and hospital admissions by thousands](#).
- 25 [Medicines and Healthcare products Regulatory Agency \(2026\), Patients to get new medicines up to six months sooner under new joint MHRA-NICE approval process](#).
- 26 [National Institute for Health and Care Excellence \(2026\), Faster, fairer access to HealthTech under new national programme](#).
- 27 [Department for Health & Social Care \(2026\), Value based procurement national standard guidance for medical technology](#).
- 28 [Department for Science, Innovation and Technology, Department of Health and Social Care, Innovate UK, NHS England \(2025\), New help for patients battling obesity through pharmacies and community access](#).
- 29 [Department for Science, Innovation and Technology \(2025\), £1 billion BioNTech investment sets way for jobs, growth, breakthroughs](#).
- 30 [Department for Science, Innovation and Technology \(2025\), Millions of vaccines to be made in Oxfordshire, and government unveils £50 million fund, in double boost for life sciences - GOV.UK](#)
- 31 [UK Research and Innovation \(2025\), Budget allocations for UK Research and Innovation](#). The £1.9 billion figure is made up of a) £1.5 billion of targeted investment in life sciences across priority buckets (Table 2) and b) £453 million of investment in the Medical Research Council (Table 4).
- 32 [Department for Science, Innovation and Technology, Department for Environment, Food & Rural Affairs, Home Office \(2025\), Animal testing to be phased out faster as UK unveils roadmap for alternative methods](#).
- 33 [Department of Health and Social Care \(2026\), UK Clinical Research Delivery key performance indicators: data to May 2026](#). 73% of commercial interventional trials with known status met the 150 day target between April 2025 and September 2025 compared to 45% between April 2024 and September 2024.
- 34 [Department of Health and Social Care \(2026\), UK Clinical Research Delivery key performance indicators: data to May 2026](#). Average set-up time refers to the median time from application to first participant recruited for commercial interventional trials. The median time was 122 days between April 2025 and September 2025. The median time was 169 days between April 2024 and September 2024.
- 35 [National Institute for Health and Care Research \(2025\), 14 new centres to bring commercial research into primary care](#).
- 36 [National Institute for Health and Care Research \(2026\), Nearly £50 million awarded for vital NHS research equipment](#).
- 37 [Our Future Health, Data and cohort - data release 14 \(2026\)](#). Over 2 million participants have consented to take part and completed the baseline health questionnaire.

- 38 [NHS England \(2026\), Genomics testing activity.](#)
- 39 [National Institute for Health and Care Research \(2026\), UK leads the world in rapid activation of complex early-phase ATiMP trial.](#)
- 40 [Department for Business and Trade \(2026\), Industrial Strategy Prospectus.](#)
- 41 [British Business Bank \(2026\), British Business Bank has agreed to make £100m cornerstone commitment to Apposite Healthcare Growth I, the Bank's largest fund commitment to date.](#)
- 42 [British Business Bank \(2026\), British Business Bank makes £50 million cornerstone commitment to Epidarex Capital.](#)
- 43 [British Business Bank \(2026\), British Business Bank invests £12m in Cytospire Therapeutics.](#)
- 44 [British Business Bank \(2026\), British Business Bank invests £5m in IMU Biosciences.](#)
- 45 Through the Life Sciences Innovative Manufacturing Fund (LSIMF), £87 million has been committed so far to nine projects, unlocking £657 million of private investment. Internal financial figures derived from grant funding agreements between OLS and grant-awarded companies.
- [Department for Science, Innovation and Technology \(2026\), Vital medicines and new jobs in over £80 million for UK life sciences.](#)
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 - [Department for Science, Innovation and Technology \(2025\), UK regions given extra £20 million science and tech cash boost as new investment kicks off landmark growth summit.](#)
- 46 [Department for Science, Innovation and Technology, Department of Health and Social Care, Department for Business and Trade \(2025\), NHS patients and British businesses to benefit from historic changes to medicines access following pharmaceutical partnership with USA.](#)
- 47 Data extracted for HS30 ('Pharmaceutical products') from [HMRC Overseas Trade Statistics](#).
- 48 [Department for Science, Innovation and Technology, Department of Health and Social Care, Innovate UK, NHS England \(2025\), New help for patients battling obesity through pharmacies and community access.](#)
- 49 [Office for Life Sciences \(2026\), Life sciences competitiveness indicators.](#) The UK ranks third for equity finance raised globally and fourth for inward foreign direct investment amongst comparator countries as of 2024.

- 50 [Isomorphic Labs \(2026\), Isomorphic Labs announces Series B investment round.](#)
- 51 [BioSpace \(2026\), AI-fueled Isomorphic bags \\$2.1B, the second largest biotech round ever.](#)
- 52 [The Tech Nation Report \(2026\), The Next Wave of UK AI.](#)
- 53 [Prime Minister's Office, 10 Downing Street, Department for Business and Trade, Foreign, Commonwealth & Development Office \(2026\), Billions in exports and investment deals secured as PM concludes visit to China.](#)
- 54 [Prime Minister's Office, 10 Downing Street, Department for Business and Trade, Foreign, Commonwealth & Development Office \(2026\), Billions in exports and investment deals secured as PM concludes visit to China](#)
- 55 This includes the following investments:
- Through the Life Sciences Innovative Manufacturing Fund (LSIMF), £87 million has been committed so far to nine projects, unlocking £657 million of private investment. Internal financial figures derived from grant funding agreements between OLS and grant-awarded companies.
 - [Department for Science, Innovation and Technology \(2026\), Vital medicines and new jobs in over £80 million for UK life sciences.](#)
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 - [Prime Minister's Office, 10 Downing Street \(2026\), Tens of thousands of new jobs and more than £18 billion boost to British economy as Prime Minister meets Japanese leader](#)
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 - [Convatec \(2025\), Convatec announces plans to invest more than \\$1 billion in R&D facilities – major expansions in the US and UK.](#)

- [Department for Science, Innovation and Technology \(2025\), Millions of vaccines to be made in Oxfordshire, and government unveils £50 million fund, in double boost for life sciences.](#)
- [Department for Science, Innovation and Technology \(2026\), Pioneering projects to transform obesity care, backed by £85 million from government and industry.](#)
- [Department for Science, Innovation and Technology \(2025\), £1 billion BioNTech investment sets way for jobs, growth, breakthroughs.](#)

- 56 [BBC News \(2026\), AstraZeneca announces ‘major’ UK investment.](#)
- 57 [National Institute for Health and Care Research, Cambridge Biomedical Research Centre About Us.](#)
- 58 [AstraZeneca \(2026\), AstraZeneca in the UK Pioneering science and economic growth in 2025.](#)
- 59 [European Commission \(2025\), The 2025 EU Industrial R&D Investment Scoreboard.](#)
- 60 [Department for Business and Trade \(2026\): Industrial Strategy Quarterly Update. Private investment and jobs figures are summed together from the July to September 2025, October to December 2025 and January to March 2026 updates.](#)
- 61 [Department for Business and Trade \(2026\), Industrial Strategy Prospectus.](#)
- 62 [UK Research and Innovation \(2025\), Budget allocations for UK Research and Innovation.](#) Sum of ‘Combined investment (SR total in millions)’ in table 2, excluding funding for ‘wider priorities’.
- 63 [Department for Business and Trade, HM Treasury \(2026\), Government cuts electricity bill for 10,000 manufacturers in boost for UK competitiveness](#)
- 64 [Medicines and Healthcare products Regulatory Agency \(2026\), Patients to get new medicines up to six months sooner under new joint MHRA-NICE approval process.](#)
- 65 [National Institute for Health and Care Excellence \(2026\), Integrated Performance Report May 2026.](#) Data is taken from the “median time between marketing authorisation and NICE recommendation (calendar days)” indicator.
- 66 [National Institute for Health and Care Excellence \(2026\), Faster, fairer access to HealthTech under new national programme.](#)
- 67 [NHS England, Biosimilar Medicines Definition.](#)
- 68 [Health Innovation Network \(2026\), Hear from the commercial experts: How innovator support is bridging the gap between NHS demand and innovation supply](#)
- 69 [Department of Health and Social Care \(2026\), NHS patients get faster access to medicines under new pilots.](#)
- 70 [NHS Business Services Authority \(2026\), NICE Technology Appraisals in the NHS in England \(Innovation Scorecard\) - to December 2025](#)
- 71 [Department of Health & Social Care, NHS England, Department for Science Innovation & Technology, Department for Business & Trade, HM Treasury \(2025\) ‘Innovator passports’ set to accelerate cutting-edge NHS care.](#)
- 72 [NHS England, Respiratory disease.](#)
- 73 [Asthma + Lung UK \(2023\), Investing in breath: the true cost of lung conditions to the UK economy.](#)

- 74 [Health Innovation Network \(2026\), Prospectus 2026.](#)
- 75 [Department of Health and Social Care \(2026\), Asthma and COPD patients to receive better care closer to home.](#)
- 76 [Health Innovation Network \(2026\), Prospectus 2026.](#)
- 77 [Health and Care Research Wales \(2025\), Major investment in groundbreaking programme to speed up cancer diagnosis in Wales.](#)
- 78 [Cardiff University, QuicDNA – Centre for Trials Research.](#)
- 79 [Public Health Wales \(2026\), Cancer survival in Wales.](#)
- 80 [Medicines and Healthcare products Regulatory Agency \(2024\), MHRA's new International Recognition Procedure \(IRP\) goes live from 1 January 2024.](#)
- 81 [Department for Science, Innovation and Technology \(2026\), Vital medicines and new jobs in over £80 million for UK life sciences.](#)
- 82 [Department for Science, Innovation and Technology \(2025\), Regional Investment Summit delivers almost a thousand jobs for UK communities.](#)
- 83 [Organisation for Economic Co-operation and Development \(2025\), Health at a Glance – Generics and biosimilars.](#)
- 84 [NHS England \(2025\): Commissioning framework for best value biological medicines.](#)
- 85 [HM Treasury \(2025\), Spending Review 2025.](#)
- 86 [UK Research and Innovation \(2025\), Budget allocations for UK Research and Innovation.](#) The £1.9 billion figure is made up of a) £1.5 billion of targeted investment in life sciences across priority buckets (Table 2) and b) £453 million of investment in the Medical Research Council (Table 4).
- 87 [UK Research and Innovation \(2026\), Pre-clinical translational models hub.](#)
- 88 [Department for Science, Innovation and Technology, Department for Environment, Food & Rural Affairs, Home Office \(2025\), Animal testing to be phased out faster as UK unveils roadmap for alternative methods.](#)
- 89 [Department of Health and Social Care \(2026\), UK Clinical Research Delivery key performance indicators: data to May 2026.](#) Average set-up time refers to the median time from application to first participant recruited for interventional commercial trials. The median time was 122 days between April 2025 and September 2025. The median time was 169 days between April 2024 and September 2024.
- 90 [Department of Health and Social Care \(2026\), UK Clinical Research Delivery key performance indicators: data to May 2026.](#) 73% of commercial interventional trials with known status met the 150 day target between April 2025 and September 2025 compared to 45% between April 2024 and September 2024.
- 91 [National Institute for Health and Care Excellence \(2025\), 14 new centres to bring commercial research into primary care.](#)
- 92 [National Institute for Health and Care Excellence \(2026\), Nearly £50 million awarded for vital NHS research equipment.](#)
- 93 [UK Research and Innovation \(2026\), Turning breakthrough ideas into the UK's next industry giants.](#)

- 94 [UK Research and Innovation \(2025\), Biomedical Catalyst 2025: Industry led R&D large projects.](#)
- 95 NIHR (2026) [Innovation Catalyst.](#)
- 96 [Our Future Health, Data and cohort - data release 14 \(2026\).](#)
- 97 [Our Future Health, Data and cohort - data release 14 \(2026\).](#)
- 98 [Our Future Health, Data and cohort - data release 14 \(2026\).](#)
- 99 [UK Health Data Research Alliance \(2025\), Driving Transparency and Impact Through Data Discoverability.](#)
- 100 [UK Biobank \(2025\), Landmark proteomics project receives £20m from Government.](#)
- 101 Previously unpublished management information from UK Biobank's laboratory IT systems on the number of samples supplied.
- 102 Previously unpublished management information from UK Biobank on the number of samples proteomic measures have been completed on.
- 103 Previously unpublished management information generated by Genomics England Ltd, based on live operational data from the Generation Study and NHS Genomic Medicine Service, figures as at 24 June 2026.
- 104 [NHS England \(2026\), Genomic Testing activity.](#)
- 105 Genomics England analysis of [Genomic Testing Activity data](#) and internal management information for the number of whole genomes sequenced between 2020 and the end of June 2026
- 106 Previously unpublished management information generated by Genomics England Ltd, based on live operational data from the Generation Study and NHS Genomic Medicine Service, figures as at 18 June 2026.
- 107 [NHS England \(2026\), Genomics Testing activity.](#)
- 108 NHS England internal analysis of [Genomic Testing Activity data](#). The analysis breaks down how many of the 850,000 genomics tests were for non-small cell lung cancer and for advanced breast cancer.
- 109 [NHS England \(2026\), Genomic Testing activity.](#)
- 110 [NHS England \(2026\), National genomic test directory.](#)
- 111 NHS England delivery progress, not previously publicly announced.
- 112 [Prevention Research, \(2026\) Connecting research, policy and practice for health equity.](#)
- 113 [National Institute for Health and Care Excellence, Annual Report 2024/25 - Investment.](#)
- 114 [Department of Health and Social Care \(2026\), UK Clinical Research Delivery key performance indicators: data to May 2026.](#)

- 115 Previously unpublished management information from the British Business Bank based on completed commitments to companies and firms via direct (venture capital) and funds (venture capital/private debt) investment. The Bank's total commitments to Life Sciences are materially higher than these figures as this information does not cover all of the Bank's investment and banking activity (for example, it does not include Nations and Regions Investment Funds, the Regional Angels Programme, guarantee schemes, or Start Up Loans), and it does not cover commitments to companies or funds categorised across multiple IS sectors.
- 116 [British Business Bank \(2026\), British Business Bank has agreed to make £100m cornerstone commitment to Apposite Healthcare Growth I, the Bank's largest fund commitment to date.](#)
- 117 [British Business Bank \(2026\), British Business Bank makes £50 million cornerstone commitment to Epidarex Capital.](#)
- 118 [British Business Bank \(2026\), British Business Bank invests £12m in Cytospire Therapeutics.](#)
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- 120 Previously unpublished management information from the British Business Bank based on completed commitments to companies and firms via direct (venture capital) and funds (venture capital/private debt) investment. The Bank's total commitments to Life Sciences are materially higher than these figures as this information does not cover all of the Bank's investment and banking activity (for example, it does not include Nations and Regions Investment Funds, the Regional Angels Programme, guarantee schemes, or Start Up Loans), and it does not cover commitments to companies or funds categorised across multiple IS sectors.
- 121 Data extracted for HS30 ('Pharmaceutical products') from [HMRC Overseas Trade Statistics](#).
- 122 [Department for Education, Ministry of Defence, Department for Business and Trade, Department for Science, Innovation and Technology \(2026\), Next generation empowered through Technical Excellence Colleges.](#)
- 123 [Department for Work and Pensions \(2025\), 50,000 more young people to benefit from apprenticeships as Government unveils new skills reforms to get Britain working.](#)
- 124 [The Manufacturer \(2026\), Government's medicines manufacturing skills scheme celebrates two hugely successful years](#)
- 125 [Advanced Therapies Apprenticeships Community, Industry Skills Accelerator.](#) A fourth pathway was introduced last year, in addition to the three published pathways.
- 126 [Skills England \(2026\), Sector Skills Needs Assessments – Life Sciences.](#)
- 127 Previously unpublished management information generated from the Global Talent Taskforce Master tracker.
- 128 Previously unpublished management information generated from Global Entrepreneur Programme Pipeline Data.
- 129 Previously unpublished management information generated from Global Entrepreneur Programme Pipeline Data.

- 130 Through the Life Sciences Innovative Manufacturing Fund (LSIMF), £87m has been committed so far to nine projects, unlocking £657 million of private investment. Internal financial figures derived from grant funding agreements between OLS and grant-awarded companies.
- [Department for Science, Innovation and Technology \(2026\), Vital medicines and new jobs in over £80 million for UK life sciences.](#)
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 - [HM Treasury, Office for Life Sciences, British Business Bank \(2026\), Reeves gets deals done at Davos.](#)
 - [Department for Science, Innovation and Technology \(2025\), UK regions given extra £20 million science and tech cash boost as new investment kicks off landmark growth summit.](#)
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- 132 [UK Research and Innovation \(2026\), Medicines manufacturing: labs of the future.](#)
- 133 [NHS England \(2026\), Market sounding findings: net zero supplier requirements from April 2027.](#)
- 134 [Department for Science, Innovation and Technology, Department of Health and Social Care, Innovate UK, NHS England \(2025\), New help for patients battling obesity through pharmacies and community access.](#)
- 135 Unpublished results from OLS survey. 8 responses were received from 9 companies surveyed. These 9 companies were surveyed given their ongoing interactions with the Service and level of support received to date. Remaining companies were not surveyed due to being in the early stages of engaging with the Service at the time of the survey being developed.
- 136 [Health Innovation Network \(2026\), Prospectus 2026.](#)
- 137 Health Innovation Network (2026), Hear from the commercial experts: [How innovator support is bridging the gap between NHS demand and innovation supply.](#)
- 138 [Health Innovation Network \(2026\), Prospectus 2026.](#)
- 139 OLS finance figure not previously publicly announced.
- 140 [Medicines and Healthcare products Regulatory Agency \(2025\), AI Airlock Sandbox Programme Report.](#)

- 141 [National Institute for Health and Care Excellence \(2025\), Updated guideline to increase access to treatments for early-stage chronic heart failure could reduce deaths and hospital admissions by thousands.](#)
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- 153 OLS finance figure not previously publicly announced.
- 154 OLS finance figure not previously publicly announced.



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