Key Perspectives:
the future of O&P

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Brief Introduction

- I am CEO of Chas. A. Blatchford & Sons
  - Family owned business started in 1890 by my great grandfather
- Sell endolite worldwide including through Endolite North America
- Have a UK based patient service business with about 20% of the UK O&P market

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Future Trends

Expect recent trends to continue:

- Pressure on Reimbursement
- Increasing technological sophistication and cost
- Short term activity increase; longer term uncertainty on activity
- How will technology affect the role of the prosthetist/orthotist? What numbers will be required?

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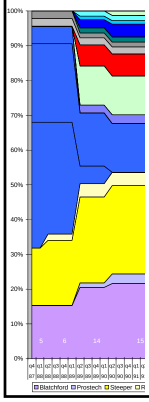
2014 is the 25th Anniversary of the introduction of competitive tendering in the UK prosthetic service market

What can we learn from the UK experience of competitive tendering?

Competitive Tendering

- Introduced in 1989 for prosthetics and early 1990s for orthotics
- Varied forms of tender but most common:
  - Prosthetics contracts – annual fee for providing services to amputees with specified numbers of staff with products sold at cost
  - Orthotic contracts – sessional fee for orthotic service with custom and off the shelf orthoses sold at tendered price

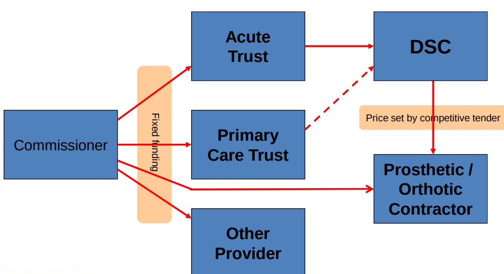
What happened?



What happened?

- After initial growth in number of service providers competition has been a force for rationalisation
- Prices have come down substantially although companies still make reasonable profits
- More recent developments have been more positive

Commissioning reform



Opportunities

- Dealing directly with the commissioners and cutting out the middle-men: funds are spent directly on patients
- Increasing prominence of the military amputee and funding questions that this raises when they are discharged
  - 40 times as much money is spent on a military amputee compared to an NHS amputee
  - Increasing notice of microprocessor products and new funding for them

What can we learn from UK?

- Government scepticism about private companies – need another voice – strong patient groups
- Need to be united to achieve change
- Inefficiencies in the system (if they can be identified) give opportunity for removing middlemen and improving funding for less cost
- Need to lever off positive stories – military amputees etc.
- Try to move focus of competition to quality rather than cost

Thank you