



# CANCER PLAN V

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## INSIGHT

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## PROPOSAL REPORT

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Uncovering LifeScience opportunities and recommendations on the back of the Cancer Plan V Proposal.

A comprehensive report uncovering what market access, marketing, sales and research opportunities companies operating within the Danish oncology market may realize if the proposal for Cancer Plan V is implemented.



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# Executive Summary

Cancer Plan V seeks to enhance Denmark's cancer care by improving patient pathways, personalizing treatment, and strengthening coordination between primary and secondary healthcare, ensuring high-quality, sustainable, and patient-centered care.

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Denmark faces high cancer incidence due to lifestyle factors, an overburdened healthcare system, delays in diagnosis and treatment, inequitable access to care, and challenges in integrating services across sectors.

## Themes

The plan focuses on three key themes:

- Individualization & Differentiation – Updating cancer pathways, improving patient-centered decision-making, and optimizing primary care involvement.
- Organization of Interventions – Enhancing screening, early diagnostics, rehabilitation, and palliative care.
- Quality Development – Leveraging AI, health data, and technology to improve diagnostics, treatment capacity, and research-driven healthcare improvements.

## Key Opportunities & Recommendations by Theme

### Individualization & Differentiation

#### *Medical Devices*

Opportunity: Develop and market technologies that improve sample quality for molecular diagnostics and enhance coordination across the cancer care pathway.

Recommendation: Align with clinical societies to integrate evidence-based devices into updated cancer care pathways and ensure compliance with evolving guidelines.

#### *Diagnostics*

Opportunity: Develop molecular diagnostic tools for better patient segmentation and targeted treatment pathways.

Recommendation: Collaborate with pharma and medical device companies to enhance diagnostic accuracy and integrate with personalized treatment approaches.



### *Pharma*

Opportunity: Expand precision medicine based on molecular biological profiling and personalized treatment pathways.

Recommendation: Engage with clinical societies to ensure that new treatments align with updated guidelines and support evidence generation for patient-specific therapies.

## **Organization of Interventions**

### *Medical Devices*

Opportunity: Develop AI-based decision tools for early cancer detection and risk-stratified screening.

Recommendation: Partner with research institutions to validate AI tools for implementation in Danish cancer screening programs.

### *Diagnostics*

Opportunity: Expand risk-based screening solutions to enable earlier detection of high-risk patients.

Recommendation: Integrate AI-driven diagnostics into national screening programs and demonstrate their cost-effectiveness.

### *Pharma*

Opportunity: Optimize treatments to align with risk-stratified screening, ensuring earlier and more effective intervention.

Recommendation: Adjust clinical development strategies to accommodate changes in patient populations due to risk-based screening.

## **Quality Development**

### *Medical Devices*

Opportunity: Develop AI-driven medical devices that improve diagnostics, automate workflows, and reduce healthcare strain.

Recommendation: Ensure compliance with evolving EU AI regulations and engage with regulatory bodies early for smooth market entry.

### *Diagnostics*

Opportunity: Improve health data utilization by integrating diagnostic tools with national digital health systems.

Recommendation: Work with health authorities to develop standardized data-sharing protocols for diagnostics.

### *Pharma*

Opportunity: Leverage real-world data from Danish health registries to support early market access and evidence generation.

Recommendation: Partner with academic and clinical institutions to generate local evidence that strengthens reimbursement and adoption pathways.

By capitalizing on these opportunities and implementing the recommended strategies, medical devices, diagnostics, and pharma companies can contribute to a more effective, patient-centered, and technology-driven cancer care system in Denmark.



# Background

This section outlines the current state of cancer care, highlighting the factors that necessitate the Danish Health Authority's leadership in developing the Cancer Plan V proposal.

## Status Quo

The current state of cancer care in Denmark is characterized by a high level of patient safety and quality of care, but also by a number of challenges. The Danish Health Authority has identified several key areas for improvement, including the need for a more coordinated approach to cancer care, the need for more research and innovation, and the need for a more patient-centered approach to care. The Danish Health Authority is currently working on a number of initiatives to address these challenges, including the development of a new Cancer Plan V proposal.

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### Year Timeline of the Danish cancer package initiatives

- 2018: Danish Health Authority launches the development of a new Cancer Plan V proposal.
- 2019: Danish Health Authority launches the development of a new Cancer Plan V proposal.
- 2020: Danish Health Authority launches the development of a new Cancer Plan V proposal.
- 2021: Danish Health Authority launches the development of a new Cancer Plan V proposal.
- 2022: Danish Health Authority launches the development of a new Cancer Plan V proposal.
- 2023: Danish Health Authority launches the development of a new Cancer Plan V proposal.
- 2024: Danish Health Authority launches the development of a new Cancer Plan V proposal.
- 2025: Danish Health Authority launches the development of a new Cancer Plan V proposal.
- 2026: Danish Health Authority launches the development of a new Cancer Plan V proposal.
- 2027: Danish Health Authority launches the development of a new Cancer Plan V proposal.
- 2028: Danish Health Authority launches the development of a new Cancer Plan V proposal.
- 2029: Danish Health Authority launches the development of a new Cancer Plan V proposal.
- 2030: Danish Health Authority launches the development of a new Cancer Plan V proposal.



## Method

The development of the "Opdag til Kæftspatte V" was led by the Danish Health Authority and built on previous cancer plans and insights from the past two decades. A multi-stakeholder approach was adopted, involving regions, municipalities, healthcare professionals, patient organisations, and civil society. Input was gathered through consultations with expert groups and existing task forces, including the Task Force for Patient Pathways on Cancer and Heart Disease and the Cancer Committee.

Recommendations were informed by analyses of current challenges and opportunities, with a focus on cost-effectiveness, patient-centered approaches, and feasibility within existing resources and additional 600 mio DKK per year from 2025 to strengthen the cancer area. The process emphasized alignment with the "Genopretning af Kæftumiddel" plan and the anticipated impact of the 2024 Health Reform. Strategic prioritization ensured that proposals addressed systemic issues affecting large patient groups while remaining scalable, sustainable and effective over a ten-year time period.

## Themes and their selection

The plan is structured around three interconnected themes: individualisation and differentiation of cancer care, organisation of interventions, and quality enhancement. These themes were chosen to address pressing challenges, such as the need for personalised treatment pathways, equitable access to care, and the sustainability of cancer care delivery. The focus on individualisation aims to reduce overdiagnosis and undertreatment, aligning care with patient preferences and medical needs. Organisational themes aim to optimize screening, diagnostics, and rehabilitation while addressing inequality. Finally, the quality theme emphasizes the role of technology, data utilisation, and robust healthcare capacity in improving outcomes.

### High-Level Description of proposed initiatives

The cancer plan V is segmented between 3 overall and interconnected themes:

- Individualisation and Differentiation
- Organisation of Interventions
- Quality Development

These are subdivided into 11 different initiatives, here placed under their corresponding themes:



# Individualization and Differentiation

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The Danish Health Authority updates cancer pathways ("pakkeforløb") to ensure well-organized processes for rapid diagnosis, clarification, treatment, and follow-up, supporting coherent pathways with differentiation across sectors while adhering to legally mandated maximum waiting times. Updates will involve relevant stakeholders.

Patient situations, preferences, and opportunities will be systematically assessed and form the basis for shared decision-making on treatment goals and care pathways. This will involve structured workflows and patient-inclusive methods.

Responsibilities and tasks in general practice before referring patients with suspected cancer will be clarified. This includes proactive interventions during treatment and follow-up, with particular support for vulnerable patients.



# Organization and Interventions

The Danish Health Authority will analyse and describe national screening programs, focusing on risk-based screening. This includes input from professional communities, patient representatives, and responsible authorities.

Systematic quality development efforts will focus on timely diagnostics and early identification, with increased use of risk stratification to improve decision-making in general practice and diagnostic centers.

Rehabilitation will be an integrated part of all cancer patient pathways. Needs for rehabilitation will be assessed systematically before, during, and after treatment. Standardized interventions across the country will aim to improve patient function and quality of life using structured workflows and patient-inclusive practices.

All cancer patients will be evaluated for potential late effects (sequelae). Interventions will maintain a high, standardized quality nationwide and will be familiar to patients and healthcare professionals.

Palliative care interventions will be addressed as part of overall treatment goals. Palliative care must be of high quality across the country, ensuring that patients with life-threatening diseases receive appropriate symptom relief and have the opportunity for a dignified death at home if desired. Responsibilities between regions, municipalities, and general practitioners will be clearly defined.



# Quality Development

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Research, quality improvement, and health data utilization will contribute to differentiated and effective high-quality interventions for patients with and after cancer across the healthcare system.

AI technologies and other health technologies will be matured and implemented across the country. Innovation, development, and adoption of such technologies will be supported.

Robust diagnostic and treatment capacity will be ensured to meet the growing number of cancer patients.



# Opportunities and Recommendations

The following section describes opportunities and recommendations for stakeholders within pharmaceuticals, medical devices, diagnostics, health economic consultancy and private healthcare providers.

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# Pharmaceuticals

## Individualization and Differentiation

### Opportunities

Initiative	Description
Overall	Opportunity to implement solutions across primary and secondary sector, that historically, has only been marketed in one sector. E.g. technologies requiring larger upfront investments or higher running costs, typically associated with secondary sector, may be feasible to adopt into the primary sector to shift the care pathway closer to the patient, improve individualized care and minimize the resource demands on secondary care.
Update Cancer Care Pathways	Opportunities for treatment based on molecular biological patient profiles. Accordingly, this makes it relevant to partner with diagnostic companies marketing or developing appropriate diagnostic solutions that enable the patient segmentation needed to justify the targeted treatment.
Update Cancer Care Pathways	Opportunities for treatments to increase access and adoption via positive mentoring by "Dansk Multidisciplinære Cancer Gruppe", and to generate evidence during follow-up and late sequelae, as this is the focus of this cancer plan. The update of guidelines are suggested as sections of the current guidelines are build on tradition rather than evidence.
Update Cancer Care Pathways	Opportunities to emphasize the value drivers associated to improved rehabilitation, late sequelae and palliation.



## Recommendations

Initiative	Description
Overall	General need for more detailed diagnosis, patient segmentation and follow-up to uncover patient-specific needs. This will likely expose hidden, or less clear, unmet needs as the patient segmentation improves, requiring personalized medicine, treatment pathways and other aids, taking the individual patients' molecular biology and preferences into consideration.
Update Cancer Care Pathways	Align with professional societies and patient organizations and ensure that they understand the value of your solution for specific cancer patients/sub-populations.
Update Cancer Care Pathways	Engage in conversations with "Danish Multidisciplinary Cancer Group" to ensure that they are aware of the evidence substantiating the value of specific treatments for specific cancer sub-populations.
Update Cancer Care Pathways	Be aware that guidelines are being revised and practice with no, limited or poor evidence is likely to be stopped or reevaluated.
Update Cancer Care Pathways	Be aware that after ensuring a positive and evidence-based placement in relevant guidelines endorsed by "Danish Multidisciplinary Cancer Group" and Danish Health Authority, it is up to the regions to implement and comply to the guidelines, thus, you must ensure that your solution is implemented in accordance with guidelines. If your solution is addressed as part of a category of similar solutions, you may have the opportunity to affect implementation per region and gain a competitive advantage locally.
Update Cancer Care Pathways	Strengthen your evidence base or value communication that justifies the added value (patient, system and payer) of your solution after diagnosis to improve rehabilitation and mitigate late sequelae and palliation.
Patient-Centered Decision-Making	Increased focus on and inclusion of patient preferences will give a competitive advantage for the solutions that are aligned with these preferences.
Patient-Centered Decision-Making & Strengthened Role of General Practice	Ensure that when clinical societies update guidelines, they are fully aware of the evidence-based value of your solution in specific cancer subpopulations, and consider how this evidence is relevant for primary care setting implementation during follow-up.



# Organization of Interventions

## Recommendations

Initiative	Description
Analysis and description of national screening programs, focusing on risk-based screening	<p>If when screening becomes more targeted based on the person's risk profile, it may result in fewer over-diagnosed patients, potentially resulting in a slightly declined market size. There may be potential to offset this as a more accurate screening practice will identify even more patients timely, subsequently increasing the market size of early diagnosed patients. To offset this commercially, you need to consider if your portfolio composition corresponds to the shift in patient population.</p>
Sequela after cancer and cancer treatment	<p>When building the health economic model for Danish Medicine Council applications, consider that the newly established regional late sequela offerings aimed to manage patients with complex sequela is most likely associated to increased costs from a third-party payer perspective. Thus, if you can claim fewer late sequela, or only general sequela, then you may be able to offset and justify additional price premiums, corresponding to the cost increment associated with treating complex sequela in the new regional offerings compared to current practices.</p> <p>Additionally, the introduction of the regional offerings of late complex sequela may justify an adjustment to the Danish PCD for post-clinical assessment, as the patient perceived severity of late sequela likely depends on the quality of offerings to help the patient manage or mitigate the late sequela.</p>
Sequela after cancer and cancer treatment	<p>It is essential to engage with relevant stakeholders within "Danish Multidisciplinary Cancer Group" regarding late sequela, to inform about the value of your portfolio to mitigate the severity of late sequela.</p> <p>Prior to engaging the professional societies ensure that you have evidence to back up your value proposition for late sequela mitigation. If your evidence base is not sufficiently representative of Danish settings for these outcomes, there may be opportunities to partner with professional societies and regions to initiate PBO pilot studies. These studies should thus investigate and prove to what extent your solution mitigates the severity of late sequela in a Danish context for specific sub-populations compared to SoC and competitive comparators.</p>



# Quality development

## Opportunities

Initiative	Description
Overall	Generally, there are larger opportunities for solutions that improve productivity gains. It's a prerequisite of a sustainable Danish healthcare system to become more effective via general optimization of resource utilization, research, quality development and technology adoption.
Research, quality improvements, and health data utilization	There are potentially increased opportunities to obtain early market access, contingent upon the generation of additional evidence using high-quality Danish registries. Leverage this data to support market entry in other regions.
Research, quality improvements, and health data utilization	If your pipeline or portfolio includes solutions that support self-management, enhance quality of life, improve functional capacity, or increase patient participation in cancer care—particularly those facilitating transitions between healthcare settings—there is an opportunity to build supporting evidence in Denmark. Collaborate with relevant research groups to conduct pilot projects or full studies to validate the impact of your solution, especially if additional Danish data is required to strengthen your evidence base.
Robust diagnostic and treatment capacity	There is a clear opportunity for solutions that can either improve the efficiency of existing healthcare staff or help increase capacity in other ways. This includes making it more attractive for healthcare professionals from other regions to work in the Danish healthcare system. With the rising number of cancer cases and the ongoing strain on specialized staff, any innovation that supports workforce efficiency or recruitment can help address the current capacity challenges in the healthcare system.



# Recommendations

Initiative	Description
Overall	This paragraph indicates that solutions with the best supporting evidence base for quality assurance have an advantage across regions and municipalities. Hence, all else equal, the competitor with the best evidence for quality assurance will gain a competitive advantage.
Research, quality improvements, and health data utilization	Ensure that all initiatives and investment improving quality of your solution, is reflected as improved patient outcomes or cost-minimization. There are no indication that this proposal will affect the valuation of organizational benefits. As organizational benefits are not mentioned in the current proposal and DMC is mentioned under "development of quality in initiatives" the HTA decisions and WTP in DMC or Sundhedsøkonomi Kvalitetsindikatorer are likely not affected by organizational benefits unless you can justify that it affects the QALY or cost.
Research, quality improvements, and health data utilization	If you have solutions in your pipeline or portfolio that enhance self-management, quality of life, functional capacity, or patient participation for individuals with cancer—particularly within primary care and during transitions between healthcare sectors—there is an opportunity to shape future clinical guidelines. By demonstrating the added value of your solution to relevant clinical societies, you can contribute to evidence-based decision-making and improve adoption in the healthcare system.



# Medical Devices

## Individualization and Differentiation

### Opportunities

Initiative	Description
Overall	Opportunity to implement solutions across primary and secondary sector, that historically, has only been marketed in one sector. E.g. technologies requiring larger upfront investments or higher running costs, typically associated with secondary sector, may be feasible to adopt into the primary sector to shift the care pathway closer to the patient, improve individualized care and minimize the resource demands on secondary care.
Update Cancer Care Pathways	Opportunity for Medical Devices that enable physicians to take samples suited for running molecular biological characteristics of the patient and cancer classification. Potential to partner with diagnostic companies that are struggling with sample yield or sample quality and co-develop devices to improve the diagnostic quality.
Update Cancer Care Pathways	Opportunity to develop and/or market technologies that can increase the coordination, collaboration and communication throughout the cancer pathway and journey for the individual patient.
Update Cancer Care Pathways	Develop and/or market evidence-based software and decision-making tools to improve pre-rehabilitation and rehabilitation, late sequelae and palliation.
Patient-Centered Decision-Making	Create and promote solutions that help patients find the right healthcare services and initiatives based on their symptoms, social situation, and preferences. These solutions should also clearly show which healthcare professionals or organizations are responsible for each step of the process.
Patient-Centered Decision-Making	Improve or develop patient reported outcome (PRO) tools and ensure integration with Sundhedstestet.dk and Digital Sundhed Denmark.



Initiative	Description
Patient-Centered Decision-Making	Market technologies or solutions that improve diagnostics and identification of cancer symptoms from the anamnesis to solve for the current state in primary practice, that is not organized to handle patients with many comorbidities and keep a satisfying sensitivity identifying patients with potential cancer.
Strengthened Role of General Practice	Increased opportunities for diagnostics, medical devices and/or IT solutions that improves medical decision making.
Strengthened Role of General Practice	Diagnostics, medical devices and/or IT solutions have the opportunity to market solutions that shifts clinical procedures, examinations and diagnostics from an in-hospital setting to a primary care setting. This could potentially include technologies with smaller capital investment, less staff requirement for process management or reprocessing, and overall smaller organizational footprint compared to current practice.



## Recommendations

Initiative	Description
Overall	General need for more detailed diagnosis, patient segmentation and follow-up to uncover patient-specific needs. This will likely expose hidden, or less clear, unmet needs as the patient segmentation improves, requiring personalized medicine, treatment pathways and other aids, taking the individual patients' molecular biology and preferences into consideration.
Update Cancer Care Pathways	Be aware that guidelines are being revised and practice with no, limited or poor evidence is likely to be stopped or reevaluated based on best available evidence.
Update Cancer Care Pathways	Be aware that after ensuring a positive and evidence-based placement in relevant guidelines endorsed by "Danish Multidisciplinary Cancer Group" and Danish Health Authority, it is up to the regions to implement and comply to the guidelines, thus, you must ensure that your solution is implemented in accordance with guidelines. If your solution is addressed as part of a category of similar solutions, you may have the opportunity to affect implementation per region and gain a competitive advantage locally.
Patient-Centered Decision-Making	Increased focus on and inclusion of patient preferences will give a competitive advantage for the solutions that are aligned with these preferences.
Strengthened Role of General Practice	Ensure that when clinical societies update guidelines, they are fully aware of the evidence-based value of your solution with specific cancer subpopulations and consider how this evidence is relevant for primary care setting implementation during follow-up.



# Organization of Interventions

## Opportunities

Initiative	Description
Analysis and description of national screening programs, focusing on risk-based screening	Opportunity to market Danish tailored solutions for cancer risk stratification via AI of the population to support the screening program.
Timely assessment and diagnosis	Opportunity to develop and market AI/software/decision tools. Partner with Lifebank Sygehus to research and develop your solution. Extend the research findings into an implementable solution in Danish settings. Ideally build on previously established commercially available decision tools that can be localized and tailored to Danish settings. Here the aim is to set the right diagnosis in time and ideally identify the risk already in primary care to enter the patient into the right cancer package, while improving the equality in the diagnostic pathway.
Timely assessment and diagnosis	<p>Opportunities for health learning platform providers. There is an interest and aim to improving the health competencies for groups within the Danish society with general low health competencies. This could potentially be enabled via courses (in-person or online), apps or other means of public awareness campaigns or materials.</p> <p>While ensuring compliance with relevant regulations, pharma companies can partner on these initiatives, with the aim to increase health competencies and thus improve the access to diagnostic and subsequent access to the right treatment.</p>
Timely assessment and diagnosis	Sales initiatives can target "Klyngepatienter" to increase to volume per sale and improve commercial excellence and become more effective.
Timely assessment and diagnosis	General interest to invest in AI powered predictive models and/or tools.



Initiative	Description
<b>Timely assessment and diagnosis</b>	Opportunity to develop decision support tools for cancer diagnosis with unspecific or weak symptoms. The first step is to map out ongoing Danish projects that are establishing local databases (such as MUP and MMS), building professional networks, and developing clinical guidelines. By leveraging insights from these local initiatives, existing software and database systems can be adapted or refined to collect data on unspecific or weak cancer symptoms. Additionally, the integration of paraclinical imaging diagnostics can help create a shared understanding and provide clearer guidance on diagnosing and treating patients with such symptoms. The primary goal is to develop a tool for use in primary care, with the potential to extend its application to secondary care. This would enhance collaboration, communication, logistics, patient involvement, and the clear allocation of responsibilities among stakeholders, clinics, and healthcare settings across the entire care pathway.
<b>Rehabilitation</b>	The recognized potential value of virtual rehabilitation should translate into a greater willingness to invest in and fund virtual solutions that enhance access to rehabilitation. Given the significant unmet rehabilitation needs among specific societal subpopulations, the solution should focus on improving rehabilitation for historically vulnerable groups with low compliance rates. Ideally, rehabilitation solutions should facilitate prehabilitation and earlier intervention in the care pathway, rather than following the traditional linear approach where rehabilitation is often delayed until late in cancer treatment, near completion or terminal diagnosis.
<b>Rehabilitation</b>	There is an opportunity to market apps or IT programs that can aid patients to understand their disease and how to best prepare for the cancer treatment, life with a cancer diagnosis, and how life can change on the other side of a cancer diagnosis. This solution could help patients through both rehabilitation and prehabilitation. If you have evidence to support the effect of your app or program, you may be able to argue from the perspective of quality standards for prevention offerings, or go via Sundhedsdatastyrelsen's Kvalitetsskema to gain a positive guidance if/when HTA is reestablished in Denmark for medical devices.



Initiative	Description
Rehabilitation	Opportunity for solutions that enable home monitoring and provide tools to enhance cancer patients' ability to support their own care during prehabilitation and rehabilitation.
Palliative Initiatives	<p>Offer IT learning systems or apps for better counseling for relevant healthcare workers (HCLWs) caring for palliative patients.</p> <p>The solutions should be dedicated to improve the HCLWs ability to have the dialog about quality of life improvements via palliative care, and how to enable a worthy last time and death.</p>



# Recommendations

Initiative	Description
Analysis and description of national screening programs, focusing on risk-based screening	<p>AI-powered decision tools for risk assessment have made significant technological and usability progress, and have to some extent proven to improve patient outcome due to higher sensitivity and potentially specificity. However, if Sundhedsøkonomi Kvalitetsskiftet is responsible for evaluating their cost-effectiveness, be aware that they may require a high-quality evidence.</p> <p>In the past, the Danish Treatment Council rejected AI-based polyp detection tools because national clinical guidelines was not established in a clinical reality when near-100% polyp detection rates was feasible. Current guidelines require that all identified polyps are removed. The coexisting of outdated guidelines and AI-powered decision tools resulted in less favourable clinical outcomes and a non-dominant or inconclusive health-economic profile.</p> <p>If Denmark continues a national Health Technology Assessment (HTA) approach for medical devices under Sundhedsøkonomi Kvalitetsskiftet, it is important to consider how local guidelines may impact cost-effectiveness before submitting an application<sup>7</sup>.</p>
Timely assessment and diagnosis	<p>If you have successfully conducted pilots in other markets within patients with unspecific symptoms, make sure that key stakeholders within the Danish Health Authorities and clinical societies are informed about the value these pilots have demonstrated.</p> <p>Ideally, you have gathered supporting evidence from the pilots, allowing for evidence-based recommendations and practices.</p>

<sup>7</sup> <https://www.ssi.dk/da/om-ssi/om-oss/om-oss-tilgange-til-undersogelse-af-nye-medikalske-udviklinger>



# Quality Development

## Opportunities

Initiative	Description
Overall	Generally, there are larger opportunities for solutions that improve productivity gains. It's a prerequisite of a sustainable Danish healthcare system to become more effective via general optimization of resource utilization, research, quality development and technology adoption.
Research, quality improvements, and health data utilization	Opportunities to market tailored and standardized PRO-questionnaires. In particular solutions that has already been developed and could be localized to satisfy the local needs may have an advantage. If these providers can offer a shorter time to implementation compared to local solutions being developed from scratch by clinicians and local software providers.
Research, quality improvements, and health data utilization	If you have solutions in your pipeline or portfolio that enhance self-management, quality of life, functional capacity, or patient participation for individuals with cancer in the primary healthcare sector—especially those that improve transitions between care settings—there is an opportunity to generate supporting evidence in Denmark. Partner with relevant research groups to conduct pilot projects or full studies to demonstrate the impact of your solution, particularly if additional Danish data is needed to strengthen your evidence base.
AI technologies and other health technologies	AI and health technology, that can improve quality, ease work-processes and mitigate capacity challenges will be prioritized for implementation. The proposal does not mention funding for such technologies. Hence, it remains to be understood to what extent the new cancer plan will enforce value-based pricing for such technologies.
Robust diagnostic and treatment capacity	There is a clear opportunity for solutions that can either improve the efficiency of existing healthcare staff or help increase capacity in other ways. This includes making it more attractive for healthcare professionals from other regions to work in the Danish healthcare system. With the rising number of cancer cases and the ongoing strain on specialized staff, any innovation that supports workforce efficiency or recruitment can help address the current capacity challenges in the healthcare system.



Initiative	Description
Robust diagnostic and treatment capacity	There are opportunities associated to enhanced image diagnostics to improve the efficiency of mammography readings by radiologists, addressing the current shortage of skilled professionals. This would help maintain high levels of sensitivity and specificity in breast cancer screenings, while easing the capacity challenges faced in the healthcare system.
Robust diagnostic and treatment capacity	There is a significant opportunity for medical devices that can enhance the efficiency of existing colonoscopy screening capacity while maintaining high sensitivity and specificity. This could be achieved through solutions like disposable colonoscopes or mobile units, such as satellite clinics or mobile endoscopy units, already implemented in the UK (InHealth Intelligence, EMI Healthcare) and the US (Oolun). These innovations can help address the capacity challenges in colorectal cancer screening and improve the overall efficiency of the healthcare system.



## Recommendations

Initiative	Description
Research, quality improvements, and health data utilization	Ensure that all initiatives and investment improving quality of your solution, is reflected as improved patient outcomes or cost-minimization. There are no indication that this proposal will affect the valuation of organizational benefits. As organizational benefits are not mentioned in the current proposal and QMC is mentioned under "development of quality in initiatives" the HTA decisions and WTP in QMC or Sundhedsudvalgetets Kvalitetstilbud are likely not affected by organizational benefits unless you can justify that it affects the QALY or cost.
Research, quality improvements, and health data utilization	If you have solutions in your pipeline or portfolio that enhance self-management, quality of life, functional capacity, or patient participation for individuals with cancer—particularly within primary care and during transitions between healthcare sectors—there is an opportunity to shape future clinical guidelines. By demonstrating the added value of your solution to relevant clinical societies, you can contribute to evidence-based decision-making and improve adoption in the healthcare system.
AI technologies and other health technologies	If you are introducing AI or digital health solutions to the market, ensure they remain compliant with regulations throughout their implementation and usage. Offer support services to assist healthcare providers in seamlessly integrating the technology into their workflows, promoting smooth adoption and optimal utilization. Additionally, provide guidance on best practices to help customers maximize the solution's benefits, enhancing both patient outcomes and operational efficiency.
AI technologies and other health technologies	If your AI-based health technology is classified as a medical device, it must obtain CE marking to comply with EU regulations before it can be marketed and purchased. With new EU legislation on AI being gradually implemented from 2024-2026, it is essential to ensure regulatory compliance early to facilitate market entry and adoption.
AI technologies and other health technologies	If you have a AI-powered Medical Device in pipeline or portfolio, you need to partner with Medtech Europe to navigate current regulations and impact the future AI Acts, as the current act is delaying adoption of AI.



# Recommendations

Initiative	Description
AI technologies and other health technologies	Operating within the AI field, enter into a dialog with Center for Health Innovation to prepare your solution, evidence and access plan to align with the innovation programs and increase the likelihood of national adoption.
AI technologies and other health technologies	Engage with relevant institutions and professional societies to contribute to the development of a digital system that provides healthcare professionals with a comprehensive overview of cancer patients' treatment, contacts, and medical history across regions, municipalities, and general practice. By participating early in the dialogue, you can help shape the system's design and prepare for potential tender opportunities when the IT project moves forward.
AI technologies and other health technologies	Engage in dialogue with the Danish Health Data Authority (Sundhedsdatastyrelsen) and Digital Sundhed Denmark to explore potential upcoming tenders or collaboration opportunities for developing national digital tools for collecting patient-reported outcomes (PRO) in cancer care.
AI technologies and other health technologies	Leverage value-based sales and marketing strategies backed by strong evidence to gain traction in key regions, municipalities, clinics, and hospitals. By securing early support from influential key opinion leaders (KOLs), you can increase awareness and trust in your solution. This early adoption and endorsement will strengthen your position when national healthcare collaborations are established, improving the chances of widespread national adoption.



# Diagnostics

## Individualization and Differentiation

### Opportunities

Initiative	Description
Overall	Opportunity to implement solutions across primary and secondary sector, that historically, has only been marketed in one sector. E.g. technologies requiring larger upfront investments or higher running costs, typically associated with secondary sector, may be feasible to adopt into the primary sector to shift the care pathway closer to the patient, improve individualized care and minimize the resource demands on secondary care.
Update Cancer Care Pathways	There are opportunities for diagnostic test based on molecular biological characteristics of patient and cancer classification. They should aim to improve the patient segmentation and identify specific subtypes or sub-populations that are difficult or impossible with current diagnostics, expensive or organizational cumbersome to facilitate. Potential to partner with pharma to align on diagnostic test development together with specific treatment for the identified sub-populations, and Medical Device companies to develop devices tailored to for quality sampling to enable the needed sample yield.
Strengthened Role of General Practice	Diagnostics, medical devices and/or IT solutions have the opportunity to market solutions that shifts clinical procedures, examinations and diagnostics from an in-hospital setting to a primary care setting. This could potentially include technologies with smaller capital investment, less staff requirement for process management or reprocessing, and overall smaller organizational footprint compared to current practice.



## Recommendations

Initiative	Description
Overall	General need for more detailed diagnosis, patient segmentation and follow-up to uncover patient-specific needs. This will likely expose hidden, or less clear, unmet needs as the patient segmentation improves, requiring personalized medicine, treatment pathways and other aids, taking the individual patients' molecular biology and preferences into consideration.
Update Cancer Care Pathways	Align with professional societies and patient organizations and ensure that they understand the value of your solution for specific cancer patients/sub-populations.
Update Cancer Care Pathways	Engage in conversations with "Danish Multidisciplinary Cancer Group" to ensure that they are aware of the evidence substantiating the value of specific treatment for specific cancer sub-populations.
Update Cancer Care Pathways	Be aware that guidelines are being revised and practice with no, limited or poor evidence is likely to be stopped or reevaluated based on best available evidence.
Update Cancer Care Pathways	Be aware that after ensuring a positive and evidence-based placement in relevant guidelines endorsed by "Danish Multidisciplinary Cancer Group" and Danish Health Authority, it is up to the regions to implement and comply to the guidelines. Thus, you must ensure that your solution is implemented in accordance with guidelines. If your solution is addressed as part of a category of similar solutions, you may have the opportunity to affect implementation per region and gain a competitive advantage locally.
Patient-Centered Decision-Making	Increased focus on and inclusion of patient preferences will give a competitive advantage for the solutions that are aligned with these preferences.
Strengthened Role of General Practice	Ensure that when clinical societies update guidelines, they are fully aware of the evidence-based value of your solution with specific cancer subpopulations and consider how this evidence is relevant for primary care setting implementation during follow-up.



# Organization of Interventions

## Opportunities

Initiative	Description
Analysis and description of national screening programs, focusing on risk-based screening	As the emphasis on enhanced risk-based stratification grows to reduce healthcare disparities, diagnostic companies have the opportunity to develop tailored solutions that promote equity. By addressing these gaps, manufacturers can not only contribute to improved patient outcomes but also gain a competitive advantage in the market.
Timely assessment and diagnosis	Sales initiatives can target "Myngesøkker" to increase to volume per sale and improve commercial excellence and become more effective.
Timely assessment and diagnosis	The proposal presents a general interest to invest in AI-powered predictive models and/or tools. Hence, this interest indicates increased opportunities for AI-supported diagnostic solutions.
Rehabilitation	The recognized potential value of virtual rehabilitation should translate into a greater willingness to invest in and fund virtual solutions that enhance access to rehabilitation. Given the significant unmet rehabilitation needs among specific societal subpopulations, the solution should focus on improving rehabilitation for historically vulnerable groups with low compliance rates. Ideally, rehabilitation solutions should facilitate prehabilitation and earlier intervention in the care pathway, rather than following the traditional linear approach where rehabilitation is often delayed until late in cancer treatment, near completion or terminal diagnosis.



## Recommendations

Initiative	Description
Analysis and description of national screening programs, focusing on risk-based screening	Diagnostic manufacturers should incorporate considerations of health inequality into their evidence and communication strategies, aligning with the growing emphasis on risk-based stratification to reduce disparities.
Analysis and description of national screening programs, focusing on risk-based screening	Diagnostic manufacturers should collaborate with regional healthcare providers to establish best practices through equity-focused pilot programs that integrate their diagnostic solutions. These programs should generate evidence demonstrating how their solutions support efforts to reduce healthcare disparities.
Timely assessment and diagnosis	Since guidelines are likely being revised or rewritten in parallel with the implementation of Cancer Plan V, it's imperative that stakeholders within involved clinical societies are aware of the supporting evidence of all tools and practices that can help reach the goal of timely assessment of diagnosis. It is recommended that medical affairs teams present the supporting evidence of relevant diagnostic tool to ensure timely diagnosis improving the identification of vulnerable patients, and patients with unspecific or weak symptoms.
Timely assessment and diagnosis	If you have conducted successful pilots in other markets, ensure that relevant stakeholders within the Danish health authorities and clinical societies are aware of the value added during these pilots. Ideally, you have generated supporting evidence based on the pilots, enabling evidence-based recommendations and practices.



# Quality Development

## Opportunities

Initiative	Description
Overall	Generally, there are larger opportunities for solutions that improve productivity gains. It's a prerequisite of a sustainable Danish healthcare system to become more effective via general optimization of resource utilization, research, quality development and technology adoption.
Research, quality improvements, and health data utilization	If you have solutions in your pipeline or portfolio that enhance self-management, quality of life, functional capacity, or patient participation for individuals with cancer in the primary healthcare sector—especially for technologies that improve transitions between care settings—there is an opportunity to generate supporting evidence in Denmark. Partner with relevant research groups to conduct pilot projects or full studies to demonstrate the impact of your solution, particularly if additional Danish data is needed to strengthen your evidence base.
Robust diagnostic and treatment capacity	There is a clear opportunity for diagnostic solutions that can reduce response times in cervical cancer screening. Current challenges, particularly in pathology, have led to delays, and solutions that streamline this process could significantly improve efficiency and patient outcomes.
Robust diagnostic and treatment capacity	There is a clear opportunity for solutions that can either improve the efficiency of existing healthcare staff or help increase capacity in other ways. This includes making it more attractive for healthcare professionals from other regions to work in the Danish healthcare system. With the rising number of cancer cases and the ongoing strain on specialized staff, any innovation that supports workforce efficiency or recruitment can help address the current capacity challenges in the healthcare system.



## Recommendations

Initiative	Description
Overall	This paragraph indicates that solutions with the best supporting evidence base for quality assurance have an advantage across regions and communities. Hence, all else equal, the comparator with the best evidence for quality assurance will gain a competitive advantage.
Research, quality improvements, and health data utilization	Ensure that all initiatives and investment improving quality of your solution, is reflected as improved patient outcomes or cost-minimization. There are no indication that this proposal will affect the valuation of organizational benefits. As organizational benefits are not mentioned in the current proposal and DMG is mentioned under "development of quality in initiatives" the HTA decisions and WTP in DMG or Sundhedsøkonomi Evaluationsstudier are likely not affected by organizational benefits unless you can justify that it affects the QALY or cost.
Research, quality improvements, and health data utilization	If you have solutions in your pipeline or portfolio that enhance self-management, quality of life, functional capacity, or patient participation for individuals with cancer—particularly within primary care and during transitions between healthcare sectors—there is an opportunity to shape future clinical guidelines. By demonstrating the added value of your solution to relevant clinical societies, you can contribute to evidence-based decision-making and improve adoption in the healthcare system.
AI technologies and other health technologies	If you have a solution in portfolio or pipeline, ensure to enter into conversations with the established working group within the Danish Pathology Society, to tailor your solution to fulfil the requirements to improve digital expansion nationally.
AI technologies and other health technologies	If you are introducing AI or digital health solutions to the market, ensure they remain compliant with regulations throughout their implementation and usage. Offer support services to assist healthcare providers in seamlessly integrating the technology into their workflow, promoting smooth adoption and optimal utilization. Additionally, provide guidance on best practices to help customers maximize the solution's benefits, enhancing both patient outcomes and operational efficiency.



# HEOR Consultancy

## Quality Development

### Opportunities

Initiative	Description
Research, quality improvements, and health data utilization	Collaborate with key public-private stakeholders to identify relevant data and modeling approaches that support the implementation of risk sharing and innovative agreements. Leverage post-approval and early adoption data to enhance value-based procurement and recommendations.
AI technologies and other health technologies	There is an opportunity to contribute to the development of models that assess the effectiveness of medical devices and AI-powered software in healthcare. This includes collaborating with national health authorities, the Center for Health Innovation, and Digital Health Denmark to address legislative challenges and barriers that may hinder the adoption of effective technologies. Additionally, the opportunity involves supporting knowledge sharing and the local development of healthcare technologies, including validation and evaluation models, as well as the development of healthcare professionals' skills.



# Privat Providers

## Organization and Interventions

### Opportunities

Initiative	Description
Rehabilitation	As prehabilitation and rehabilitation is declared to have large unmet needs and opportunities to improve patient outcome and societal economic advantageous, there may be opportunities for private-public collaborations to provide the offerings. This could open up for more focus, access and funding to privately provided services in private clinics that facilitate prehabilitation and rehabilitation.

