



#thoughtleadership

Who will you be buying your social care system from in 2025?

The recent acquisition of Servelec by The Access Group will have raised both eyebrows and some questions, the most interesting of which could be 'who will you be buying your social care case management system from in 2025?'

With the Covid-19 pandemic seeing many councils extending their existing case management system (CMS) contracts rather than go to market, 2025 could be a busy year.

The Access acquisition adds to the widening of portfolio offerings from suppliers across the health and social care market, with both Advanced and Liquidlogic in the same space. The supplier portfolios increasingly include service provider solutions, which align with the social care provider emphasis in NHSx and NHS Digital.

If the suppliers can successfully join the systems in their portfolio, we could begin to see true end-to-end solutions across social care and health.

It is difficult to work out whether this trend is being driven by demand from local councils and local health organisations or by the market itself seeing a wider opportunity through Integrated Care Systems (ICS), we suspect the latter.



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CMS suppliers who do not have a wide portfolio offering may well find the future more difficult, particularly if other suppliers can join their systems successfully. Selecting a stand-alone adult social care system is likely to become a minority pursuit.

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In the context of shrinking budgets in local government, no long-term funding arrangements for social care and no clear drivers for change the likelihood of dynamic change in the market just isn't there, it will be incremental at best. ICSs will take a while to significantly impact local government and probably even longer to impact IT systems development and procurement.


Of course, an alternative backdrop over the next four years would change matters. Some combination of a material increase in the sector's investment in technology, more supplier innovation, including the adoption of disruptive models, the public owning and controlling their own health and care data, and changes in ICS and/or Council procurement approaches to CMSs could re-shape solutions and the types of vendor best able to provide them. Councils and ICSs would be wise to 'watch this space' carefully and seek expert advice before making any new investments over the next one to four years.

For more information about our work with social care case management systems or our Integrated Care Practice, please contact Russ Charlesworth, (Director of Integrated Care): russ.charlesworth@socitm.net, or Jerry Hall (Client Services Director): jerry.hall@socitm.net.



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