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POLICY PRIMER

Horizon Scanning

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Acknowledgements

The Australian Academy of Health and Medical Sciences would like to thank the Fellows who contributed to this submission.

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POLICY PRIMER

Horizon Scanning

From our experiences of the COVID-19 pandemic to the rapid evolution of Artificial Intelligence, Australians do not have to look far to appreciate the national importance of identifying, understanding and preparing for emerging and future threats and opportunities.

This Policy Primer from the Australian Academy of Health and Medical Sciences (AAHMS):

1. Explores the meaning and purpose of horizon scanning, and some of the different shapes this can take;
2. Maps the Australian health and medical science horizon scanning landscape;
3. Overviews key international approaches to and national systems for health and medical science-related horizon scanning.

This Primer is intended to inform discussion across government, research funders and the broader health and medical sciences (HMS) sector about the role and design of a nationally coordinated HMS horizon scanning capability.

It maps key past and present Australian approaches, as well as some existing international approaches, and identifies questions that could provide a starting point for exploring next steps that Australia could take towards realising a nationally coordinated horizon scanning model.



Summary

- In this Policy Primer, ‘horizon scanning’ is defined broadly as a tool or process for identifying and examining early signals of emerging developments that may gesture to opportunities and challenges unfolding into the future.
- While horizon scanning can vary depending on its duration and frequency, scope and focus, or purpose and integration, it generally involves scanning, identifying, monitoring, analysing, synthesising and communicating information about emerging issues, threats and opportunities.
- Potential HMS horizon scanning foci include emerging and future trends, challenges, risks and opportunities relating to: research infrastructure, research translation and commercialisation, health systems, health technology, technology, public health, communicable diseases, health equity, and social trends and attitudes.
- Australia has pockets of developing capability across scanning and surveillance, workforce trends and future needs, intelligence synthesis and forecasting, and policy and strategy. However, without policy-level, system-wide national coordination, its horizon scanning landscape remains patchy and fragmented.
- An effective national HMS horizon system must have a global outlook, interfacing with international initiatives and learning from the approaches of comparable nations – some of which are summarised in this Policy Primer.
- A national HMS horizon scanning capability should also capture emerging opportunities and innovations (as opposed to only risks and threats) – including disruptive technologies such as AI-enabled diagnostics, next-generation vaccines, gene and cell therapies, and novel models of care – enabling Australia to look over the horizon, not just towards it.ⁱ
- Australia’s HMS horizon scanning system could take many shapes, provided these include a clear route into national priority setting, research investment, workforce policy and infrastructure planning, and are assessed by whether timely intelligence reaches accountable decision makers and receives a reasoned response.

ⁱ This is explored in further detail in the Academy’s October 2025 submission to the Australian Government’s consultation on the draft National Health and Medical Research Strategy.²¹



What is horizon scanning?

1.1. Defining horizon scanning

While there are many different definitions of horizon scanning, most of these describe **a tool or process for identifying and examining early signals of emerging developments that may gesture to opportunities and challenges unfolding into the future**. This tends to apply across the various contexts and settings where horizon scanning is undertaken – e.g. business, government, technology, research, etc.

Government definitions of horizon scanning include the UK Government Office for Science's that are new, emerging or becoming obsolete and that have the potential to affect health, health services and/or society.⁴

1.2. What does horizon scanning look like?

Horizon scanning can take many different forms depending on its focus, intent, and institutional or sector context. For example, horizon scanning can vary according to:

- **Duration and frequency:** Horizon scanning may be undertaken as, for example, either a sustained, continuous surveillance function, or an occasional (i.e. carried out every quarter, or every x years) or ad hoc exercise.⁵
- **Scope and focus:** Horizon scanning can be, for example, broad or non-specific (which the OECD describes as “exploratory”), or more narrow or targeted (which the OECD describes as “issues-focused”).³
- **Purpose and integration:** Horizon scanning can be performed either as a standalone activity or initiative, or as one tool or component among a suite of others deployed as part of a broader foresight process or futures thinking exercise.ⁱⁱ Additionally, horizon scanning – whether as a standalone activity or single component of a wider process or exercise – can be more or less integrated into a broader, coordinated sectoral, thematic or national horizon scanning system.^{2,6}

Irrespective of the factors listed above, most forms of horizon scanning – regardless of their scale or context – will involve a series of scanning, analysing, synthesising, and information communication activities.⁷

ⁱⁱ The World Health Organization (WHO) defines foresight as “the process of systematically surveying developments in science and technology that are likely to lead to the greatest health, social, and economic benefits.”²⁰ Horizon scanning may be one of multiple other techniques – e.g. assumption testing, futures wheel, scenarios, windtunnelling, backcasting, etc. – deployed as part of a foresight process.²

1.3. Health and medical science horizon scanning

What does horizon scanning mean in the context of HMS?

Where ‘health’ and ‘horizon scanning’ are mentioned together, the focus is often restricted to emerging public health trends and future health threats, or on Health Technology Assessment (HTA).ⁱⁱⁱ In Australia, HTA is probably the most developed area of HMS-related horizon scanning, and informs Medicare and Pharmaceutical Benefits Scheme decision-making.⁸

Reflecting the diverse, cross-sector and setting-dependent, and expansive character of the HMS ecosystem, this Policy Primer focuses on health and medical horizon scanning through a wide-angle lens that aims to capture emerging and future trends, opportunities, threats and risks relating to:

- **Research infrastructure**, e.g. funding, digital infrastructure and data systems, facilities and equipment, and the HMS workforce – which is spread across research, clinical, education and industry settings.
- **Research translation and commercialization**, e.g. pathways, investment, partnerships, regulatory requirements and sovereign capability (including manufacturing capacity).
- **Health systems** into which HMS is translated, and where many people most frequently and meaningfully interact with HMS.
- **Health technology**, i.e. new and emerging medicines, vaccines, diagnostics, devices and clinical interventions, as well as novel uses of existing health technologies and the process of existing health technologies becoming obsolete.
- **Technology**, i.e. broader technological developments (such as artificial intelligence and digital technologies, synthetic biology etc.) that could reshape how HMS is conducted, translated, governed and perceived.
- **Population health threats and burden**, i.e. changing patterns of health loss and their drivers – including non-communicable diseases, mental health, injury and ageing; (re-) emerging infectious diseases and antimicrobial resistance; and environmental, social and commercial determinants such as climate change and pollution – together with related opportunities across prevention, early detection, treatment and care, and preparedness and response.^{iv}
- **Public health**, i.e. changing population health trends and needs, including those associated with ageing, chronic disease, mental health, climate change and environmental pollution, and opportunities for prevention.
- **Communicable disease**, including (re-)emerging infectious disease threats; antimicrobial resistance; and surveillance, preparedness, prevention and response systems.
- **Population health threats and burden**, i.e. changing patterns of health loss and their drivers – including non-communicable diseases, mental health, injury and ageing; (re-) emerging infectious diseases and antimicrobial resistance; and environmental, social and commercial determinants such as climate change and pollution – together with related opportunities across prevention, early detection, treatment and care, and preparedness and response.^v
- **Health equity**, specifically: changing patterns of unmet need, and inequitable consideration and treatment by or access to HMS.
- **Social trends and attitudes**, including public trust in and social license for HMS, information-seeking behaviours, expectations of research and health institutions, and perspectives on the appropriate uses of technologies across HMS.

ⁱⁱⁱ HTA describes an established “multidisciplinary process that uses explicit methods to determine the value of a health technology at different points in its lifecycle”, with the goal of informing decision-making aimed at shaping a resilient, equitable and efficient health system.²²

^{iv} For a recent example of a burden-based framing that considers diseases, risk factors and social, environmental and technological drivers together, see the Lancet Commission on 21st Century Global Threats to Health (2026), which ranks threats by the health loss that is amenable to policy action to 2100.²³



Australian HMS horizon scanning

Over the last two decades, a variety of HMS horizon scanning initiatives have operated in Australia.

Many of these initiatives have operated at different scopes and at different system levels. Current initiatives fall into four key focus areas, which are outlined in section 2.1 to provide a sketch of Australia's current HMS horizon scanning landscape:

- Scanning and surveillance
- Workforce trends and future needs
- Intelligence synthesis and forecasting
- Policy and strategy

A more extensive range of past and present initiatives is summarised in the Appendix. As discussed in section 2.2, HMS horizon scanning in Australia is currently patchy and fragmented – lacking the policy-level, system-wide, national coordination that would bolster our national readiness for and resilience to future opportunities, risks and threats.

2.1. Themes

Today, discrete HMS horizon scanning efforts in Australia are undertaken across many government and non-government organisations, agencies, collectives and initiatives. While they largely operate in silos and rarely plug into one another, many of these efforts relate to one of the following categories: scanning and surveillance; future workforce needs; intelligence synthesis and forecasting; or policy direction.

Scanning and surveillance

Among present horizon scanning initiatives, the Australasian Joint Agencies Scanning Network (AJASN) is one of the nation's longest running.⁹ Since 2024, AJASN has provided participating government agencies across Australia and New Zealand with horizon scanning training, mentorship and information sharing opportunities and resources. Its focus is not HMS-specific; its remit is weak signals and emerging issues at large, and the implications for government policy and programs across Australasia.⁹ Being a membership organisation whose reports are not open-access, it is unclear to what extent AJASN's capability and intelligence are disseminated from individual participating agency representatives throughout their particular agencies and beyond, or whether it interfaces with other components of Australia's horizon scanning architecture.

A different Australian horizon scanning network with a more specific focus is the National Animal Health Horizon Scanning and Foresight Network.¹⁰ Reestablished in 2024 by the Office of the Chief Veterinary Officer, the network brings together Commonwealth and jurisdictional agencies, Animal Health Australia, Wildlife Health Australia and the Australian Centre for Disease Preparedness. It connects specialist intelligence and foresight expertise relevant to animal health and threats at the human–animal–environment interface.

Moving beyond networks such as these, perhaps the most significant addition to Australia's HMS-related scanning and surveillance infrastructure to date is the creation of the Australian Centre for Disease Control (CDC). Established as an independent agency in 2026, the CDC brings together disease surveillance, risk assessment and preparedness, with the aim of monitoring communicable disease threats in order to provide early warning and enable appropriate action before risks escalate. While the CDC has potential to significantly uplift domestic horizon scanning capability, the extent to which this potential is realised will depend on its appropriate and sustained resourcing, and on overarching, cross-system governance and planning that enables it to interface with surveillance initiatives across research, health technology and industry.

Workforce trends and future needs

Another underdeveloped focus area that is emerging from Australia's fragmented HMS horizon scanning landscape relates to workforce trends, and understanding future challenges that could emerge from these.

The Department of Health, Disability and Ageing's (DHDA) landmark 2024 *Australian Health and Medical Research Workforce Audit* provided a baseline for understanding the HMS research workforce composition, career pathways and challenges.¹¹ It examined approximately 39,000 active health and medical researchers and almost 20,000 Australians with HMR training working in non-research roles, informed the proposal of a HMR Workforce Plan in the *National Health and Medical Research Strategy 2026–2036*, and recommended an approach to future ongoing auditing that would enable stakeholders to anticipate future trends, identify emerging challenges, and make informed decisions to support the continued growth and success of Australia's HMS research workforce.¹²

Given that Australia's HMS research workforce includes a cohort of clinician scientists, as well as research-active clinicians, another data collection initiative that may be able to support more nationally comprehensive and coordination HMS workforce horizon scanning is the *Supply and Demand Models* that DHDA has produced both for the entire medical workforce and select clinical professions since 2023.¹³ More forward-looking than the *Australian Health and Medical Research Workforce Audit*, these models project needs across the medical professions they cover.

Taken together, these two initiatives provide valuable evidence that could inform HMS workforce horizon scanning. A nationally coordinated, system-wide approach such as that recommended in the *National Health and Medical Research Strategy*, could extend their value by connecting workforce baselines and projections with emerging scientific, technological and economic developments, enabling more integrated research and workforce planning.¹²

Intelligence synthesis and forecasting

Two periodic intelligence synthesis and forecasting initiatives that contribute to Australian HMS-related horizon scanning are:

- Medicines Australia's annual *Medicines of the Future* horizon scanning forum – currently funded as part of the 2022 Commonwealth–Medicines Australia Strategic Agreement, Medicines Australia's Horizon Scanning Forum is an issues-focused platform that brings government, industry and patient stakeholders together to share their perspectives on emerging therapies and the potential implications for healthcare planning.¹⁴ While it supports cross-stakeholder awareness and discussion of emerging innovation, it is medicines-focused – contributing to only one segment of HMS horizon scanning and does not feed into a continuous and overarching national scanning function.

- CSIRO's *Our Future World* report is an exploratory, once-in-a-decade horizon scanning initiative with a broader focus than *Medicines of the Future*. The second iteration, published in 2022, identified escalating health challenges (including: ageing, chronic disease, mental health, infectious disease and antimicrobial resistance) alongside advances (including in preventative health and precision medicine) as medium-term global imperatives.¹⁵

Policy and strategy

A fourth type of existing initiatives for Australian HMS horizon scanning are those relating to policy and strategy. Two recent such initiatives have included recommendations for the coordinated national approach to horizon scanning that could connect and elevate the first three categories (i.e. scanning and surveillance; workforce trends and future needs; intelligence synthesis and forecasting):

- The *2024 Health Technology Assessment (HTA) Policy and Methods Review*, undertaken under the *2022-2027 Commonwealth-Medicines Australia Strategic Agreement*, makes an explicit case for a national HTA horizon scanning function.^{16,17} Recommendation 47 of the Review calls for this function to be established and resourced to improve stakeholder engagement on new and emerging health technologies, and support forward planning and priority setting.¹⁶ While such a function could potentially connect intelligence more closely to decisions about technology assessment, access and health services, the Review report does not include an implementation plan, and no such national function has so far been developed.
- The *National Health and Medical Research Strategy 2026-2036*, which recommended the development of a national horizon scanning capability.^{v,12} The capability proposed is broader in focus than the HTA horizon scanning function previously included in the HTA Policy and Methods Review. Focus Area 1.2 of the National Strategy describes a nationally coordinated approach to horizon scanning that spans investment, workforce and infrastructure planning, and positions its development as foundational to the implementation of the wider National Strategy. While the National Strategy proposes a National Strategy Advisory Council and HMR Workforce Plan in relation to its proposed national horizon scanning capability, it does not include broader or more specific details regarding implementation.¹² For example, it does not set out a detailed operating model, including who will conduct scanning, how it will be resourced, or how existing mechanisms will be connected – nor does it recognise that implementation will need to involve the identification of the most significant horizon scanning coverage gaps, or establish how intelligence will be shared, assessed and translated into action.¹²

2.2. Analysis

Taken together, the select HMS horizon scanning-related initiatives outlined thematically in section 2.2 (as well as the more extensive list presented in the Appendix) demonstrate that Australia has emerging pockets of HMS horizon scanning capability and expertise. In addition, there is a degree of coordination within some domains – notably HTA (exemplified by the *HTA Policy and Methods Review*, and programs operated under the *Commonwealth-Medicines Australia Strategic Agreement*) as well as disease surveillance, risk assessment and preparedness (exemplified by the CDC).

However, Australia's HMS horizon scanning remains patchy, and even where there are pockets of emerging domestic capability and expertise, they are largely developing and operating in isolation from one another. Without a nationally coordinated approach to HMS horizon scanning (similar to that recommended in the *National Health and Medical Research Strategy*), it is difficult to identify, understand and fix coverage gaps; and to connect existing initiatives to each other and to the policymaking process.

^v The Academy welcomed the inclusion of a horizon scanning recommendation in the National Strategy in its October 2025 submission to the Australian Government's consultation on the draft Strategy.²¹

While this degree of fragmentation would be problematic for horizon scanning across any area, it poses particular challenges in the HMS context – where emerging developments cut across disciplinary and institutional boundaries. For example, discovering, developing and operationalising a promising therapy creates questions about regulation and reimbursement, but also clinical skills, facilities, data systems, manufacturing, equity of access, and its trustworthiness to communities – to name just a few. Separate horizon scans or forecasting models risk illuminating individual parts of this picture without revealing their dependencies or prompting coordinated preparation – fragmentation that may result in duplicated effort, coverage gaps and missed opportunities to act early.

Developing a nationally coordinated HMS horizon scanning function would be an opportunity to make existing initiatives more than the sum of their parts, and – by better connecting them to each other and to decision-making mechanisms – to equip Australia to anticipate emerging health challenges and prepare its research and health systems to meet them. If it is developed with the capability to identify future opportunities as well as challenges, a national HMS horizon scanning function would also strengthen Australia's ability to realise the health benefits of scientific and technological developments more effectively and equitably.^{vi}

^{vi} The Academy welcomed the inclusion of a horizon scanning recommendation in the National Strategy in its October 2025 submission to the Australian Government's consultation on the draft Strategy.²¹



Global HMS horizon scanning

Given that the challenges and opportunities of tomorrow cannot be contained by international borders, an effective Australian horizon scanning system must have a global outlook. This includes integrating and contributing to shared intelligence generated by international initiatives such as those operated by WHO and the OECD (see section 3.1), and learning from relevant methodologies and approaches deployed by individual nations who have more developed and coordinated horizon scanning systems (see section 3.2, including Table 1).

3.1 International initiatives

International initiatives support HMS-related horizon scanning by producing cross-country intelligence about emerging developments, strengthening collective foresight skills, and encouraging nations to connect this work with collaborative or complementary strategic planning. Notable international intergovernmental approaches include those operated by the OECD and WHO – the former focusing on supporting the use of foresight across policy development and the latter on implications for global health.

Established in 2013, the OECD's Strategic Foresight Unit supports national governments to explore plausible futures and develop policy approaches capable of preparing for and responding to uncertainty.¹⁸ Mechanisms the Strategic Foresight Unit uses to do this include hosting collective forecasting exercises; supplying training resources; identifying steps that governments can follow to predict, react and rebuild in the face of emerging global risks; and publishing open-access, future-focused intelligence reports on HMS-related topics such as synthetic biology, AI and automation.¹⁹

Established in 2020 by the WHO Science Division, the Global Health Foresight function supports Member States to incorporate futures thinking and horizon scanning into strategic health planning.²⁰ The work of the WHO Global Health Foresight function focuses on emerging science and technology, their potential health benefits and risks, and implications for policy and preparedness. This extends beyond individual technologies approaching market entry by considering, for example, how such developments may interact, and what types of health governance they might necessitate. A key function of WHO Global Health Foresight is building capacity for identifying trends and scientific advances with significant potential health impacts. As well as sharing intelligence from its horizon scans – providing individual countries with data to inform their own evaluation of opportunities and challenges presented by emerging developments, WHO provides practical guidance and public health foresight training that countries can use to support their development of national horizon scanning capabilities.

3.2 National systems

A number of countries have established nationally coordinated approaches to identifying and assessing emerging and potential future developments relevant to HMS. These vary in sophistication, scope, design, and also the types of coordination they enable.

Selected national approaches to coordinated horizon scanning are summarised in **Table 1** below^{vii}.

Most of these focus on HTA, particularly for medicines – reflecting an international trend of this being one of the most developed and coordinated areas of HMS horizon scanning. Broader government foresight architecture is included where this offers lessons for national HMS coordination.

Table 1. Example nationally coordinated approaches to HMS-related horizon scanning

Country and lead(s)	Scope	Coordination and use of intelligence
Canada Canada's Drug Agency (CDA-AMC; formerly CADTH)	New and emerging health technologies likely to significantly affect healthcare delivery in Canada, including devices, diagnostics, procedures and other non-drug interventions.	A pan-Canadian agency created and funded by federal, provincial and territorial governments produces Horizon Scans and an annual Watch List for health system decision-makers. <i>N.B. Quebec uses an alternative platform.</i>
Ireland Health Service Executive (HSE) Corporate Pharmaceutical Unit National Cancer Control Program National Centre for Pharmacoeconomics, Ireland	Medicines for which pricing and/or reimbursement applications are expected within the next 18 months.	Industry-submitted pipeline information informs HSE budget and service planning. Ireland also participates in the International Horizon Scanning Initiative .
Italy Italian Medicines Agency (AIFA)	New medicines and new indications of authorised medicines expected within 12–36 months.	A five-phase process covers: (1) identification, (2) selection and prioritization, (3) evaluation, (4) dissemination and integration, and (5) decision-making, and periodic verification. Reports support AIFA's offices, secretariats and technical-advisory committees, and all phases are monitored with KPIs.

^{viii} Note that Table 1 is not exhaustive; it summarises some (but not all) nationally coordinated approaches to HMS horizon scanning.

Country and lead(s)	Scope	Coordination and use of intelligence
Malaysia Malaysian Health Technology Assessment Section (MaHTAS), Ministry of Health	New and emerging health technologies and healthcare interventions likely to have significant impact.	MaHTAS identifies technologies and disseminates early alerts to relevant authorities. A Horizon Scanning Technical Advisory Committee prioritises filtered technologies. Methods are set out in a manual published by the Ministry of Health.
Netherlands National Health Care Institute (Zorginstituut Nederland)	New medicines and new indications of authorised medicines expected on the market within approximately two years.	The Horizonscan Geneesmiddelen (i.e. the Dutch national public list of medicines coming to market) is drafted from public sources, reviewed by expert working groups and finalised by the Zorginstituut. It informs policymakers, insurers, hospitals and clinicians, and is the basis for identifying candidates for the expensive-medicines “lock” (i.e. a mechanism that enables Minister of Health to hold a new high-cost medicine out of the basic health insurance package until it has been assessed and its price negotiated).
Norway Norwegian Medical Products Agency (DMP)	New active substances and indication extensions funded by the National Insurance Scheme. Medical devices have been included since 1 January 2024.	Horizon scanning notifications are sent to the national managed-introduction system and published on MedNytt. Since May 2023, specialist-service medicines are not scanned; companies must instead submit an assessment request.
United Kingdom National Institute for Health and Care Innovation Observatory (NIHRI) Government Office for Science (GO-Science)	NIHRI: Medicines and medtech, as the national horizon scanning centre. GO-Science: Cross-government futures and foresight.	NIHRI provides routine outputs to the National Institute for Health and Care Excellence (NICE) and the Accelerated Access Collaborative (AAC), and intelligence to NHS England, Medicines and Healthcare products Regulatory Agency (MHRA), UK Health Security Agency (UKHSA), and Department of Health and Social Care (DHSC). Horizon scanning for health technology appraisal in England works through topic notification to NICE. GO-Science provides futures training, the Futures Toolkit and a Heads of Horizon Scanning Network of over 300 members.



Discussion questions

Key questions to guide Australia's next steps towards a nationally coordinated horizon scanning model include:

- Which national decisions would benefit most from a coordinated HMS horizon scanning capability?
- Who should be responsible for responding to the intelligence and/or advice generated by this capability, and how should they be connected to it?
- How should signals with limited evidence but potentially significant consequences be assessed and monitored?
- What governance and resourcing arrangements would best connect existing expertise, initiatives and capabilities?
- How could the capability be piloted and scaled?
- What can Australia learn from international HMS horizon scanning models?

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Authorisation

This submission was approved for submission and publication by members of the Academy's Executive in October.

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