Independent Healthcare Providers Network

State of the sector 2022

IHPN industry barometer

IN PARTNERSHIP WITH

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Contents

Foreword

I am delighted to launch our third annual IHPN Industry Barometer: State of the Sector report, which provides a snapshot of how senior leaders across the independent healthcare sector feel about all their key markets and the issues affecting their business.

The health service is under significant pressures with rising waiting times for patients across all parts of the system. In addition, we're facing an economic downturn and cost of living crisis which is impacting all healthcare providers' ability to run their organisations and recruit and retain staff.

Against this challenging backdrop, independent providers are committed to playing their role in getting the healthcare system back on track. And given the link between rising NHS waiting lists and economic inactivity, we also have a part to play improving the overall wealth and prosperity of the country.

Looking at this year's barometer results, it's clear that independent providers are positive about the prospects in all their key markets, with growth expected in both domestic and international self-pay. And while there's some hesitation about the prospects for NHS activity; this is still seen as a key area for the sector over the next 12 months, and IHPN will be working in particular to ensure relations with new NHS Integrated Care Systems (ICSs) are put on steadier footing as they begin to settle and evolve.

Of course, the headache for all healthcare providers – whether NHS or independent sector – is how to tackle the huge workforce shortages facing the country, and indeed wider world. This is no simple task, but IHPN are committed to keeping up the momentum with our partners in the NHS and Health Education England so that the sector is fully factored into wider workforce planning and can play a full role in the training and development of the next generation of healthcare professionals.

We have been fortunate to have once again worked in partnership on the Industry Barometer with Practicus, whose purpose is to help organisations and people navigate change. We thank them for the experience and insight they have brought to this project.

We will be running the Barometer each year and so over time we can gain further insights from members and even better support them across all their key markets. Thank you again to all our members who contributed to the survey and I hope that you find the results interesting.

David Hare, Chief Executive, IHPN

PRACTICUS™ Navigating change and ambiguity

Private Healthcare leaders are looking forward to 2023 and planning how to manage rapidly changing priorities against a backdrop of political and economic turmoil.

While there is robust market optimism, fuelled by high demand throughout 2022 from private individuals as well as the NHS, the barometer strikes a note of caution. Consumer confidence remains key, but the current inflationary pressures, staffing shortages and complexity in working with the new NHS ICBs may stifle growth.

But the foundational shifts unleashed by the pandemic will be sustained. These include:

- Adoption of digital innovations:
- Greater use of data sharing and analytics,
- Deeper public-private collaborations in sharing critical capacity.

> **"Consumer confidence remains key, but the current inflationary pressures, staffing shortages and complexity in working with the new NHS ICBs may stifle growth."**

Willingness to innovate to improve processes, outcomes and services will continue to be key drivers to alleviate some of the pressures. Innovation is often associated with technology, but it can also be the willingness to embrace change and transformation or to find ways to streamline processes.

Today's hot transformation topics include:

- Digitally empowering medical practitioners and patients
- Increased and speeded up diagnostics
- Using systems to improve patient safety

These dynamics offer fresh opportunities and are challenging healthcare providers to transform quickly. How they respond will shape their ability to navigate whatever the next challenges or major business disruption might be.

This is where Practicus can help with the provision of recruiting, advisory or consulting services:

- **Recruiting** – providing access to the right skills at the right time
- **Advisory** – through our community of experts from inside and outside the sector, we have the experience and hindsight to deliver your foresight
- **Consulting** – A full suite of change solutions to reduce risk and accelerate your agenda. (These include PMO and Data Diagnostic services)

We are delighted to be supporting IHPN again this year, to take the pulse of the industry and to highlight some of today's challenges. We look forward to continuing to work with IHPN and to the opportunity to meet some of you at events during the course of the year.

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If you have a skill or leadership gap or are facing an intractable challenge, contact me to explore how Practicus can help.

Get in touch with Practicus today

Results: The market environment

How would you describe the market environment for the provision of NHS funded services?

3%	Very positive
27%	Positive
16%	Neither positive nor negative
47%	Negative
7%	Very negative

How would you describe the market environment for the provision of international self-pay services?

8%	Very positive
47%	Positive
37%	Neither positive nor negative
8%	Negative
0%	Very negative

How would you describe the market environment for the provision of PMI funded services?

23%	Very positive
32%	Positive
41%	Neither positive nor negative
4%	Negative
0%	Very negative

How would you describe the market environment for the provision of domestic self-pay services?

44%	Very positive
44%	Positive
12%	Neither positive nor negative
0%	Negative
0%	Very negative

> **PMI remains relatively static… feels like we will continue with the current steady state.**
>
> **PMI levels have returned to pre-pandemic levels.**

> **Good market growth, in part fuelled by the NHS waiting list situation which isn't going to change anytime soon.**
>
> **Growth may taper with cost of living increases.**

When it comes to feelings about different markets, the four questions show that respondents feel most positively about the domestic self-pay market, with 88% of respondents viewing it very positively or positively. This is followed by both PMI funded services and international self-pay at 55% and finally NHS funded services at 30%.

Respondent comments suggest that the rising demand in the domestic self-pay market is fuelled by ever growing NHS waiting lists for elective care. Similarly, when it comes to the PMI funded market, this is an area that offers real potential growth, although providers are keen to balance this with their work to support the NHS in clearing the backlog.

When we compare these findings to last year, the biggest changes are in NHS funded services and international self-pay. Respondents are feeling much less positively about the market for the provision of NHS funded services – a fall from 44% feeling very positive or positive to just 30%. This is reflected in the comments which suggest tensions between the need to bring in new capacity to the NHS and cut the backlog of care, and the increasing budgetary pressures faced by the health service, combined with the often inward looking mindset of some Integrated Care Boards (ICBs).

> **The ICB are very keen to ensure we continue to support…however there is a conflict between available budgets and the need to reduce waiting lists.**

> **The NHS's central narrative re more use of sector is not materialising in our local markets.**

> **International work is returning, but still not back to pre-covid levels**

In terms of the market of international self-pay, respondents this year are feeling much more confident, with an increase from 20% feeling very positive or positive last year to 55% this year. This is not hugely surprising given that travel restrictions put in place during the pandemic have now largely been lifted, with international travel gradually getting back to more "normal" levels.

Where do you see the greatest opportunities for growth in private pay over the next 5 years?

- **87%** Self-pay
- **20%** Company schemes
- **37%** PMI
- **10%** Specialist insurance schemes, over 6 week wait times, over 55s etc
- **7%** Other

NB *Respondents were able to pick more than one option for this question.*

Respondent comments suggest that the rising demand in the domestic self-pay market is fuelled by ever growing NHS waiting lists for elective care. Similarly, when it comes to the PMI funded market, this is an area that offers real potential growth, although providers are keen to balance this with their work to support the NHS in clearing the backlog.

Which areas of your business do you expect to see the biggest growth over the next 12 months?

47% NHS funded

16% Private and corporate insurance schemes

37% Domestic self-pay

> **47% feel the biggest growth opportunities are with NHS funded services.**

When respondents were asked to look at their overall market environment, almost half of respondents (47%) still felt that the most growth opportunities in the future are with NHS funded services, followed by 37% for domestic self-pay.

What do you see as the three biggest challenges facing the independent sector?

80% Access to skilled workforce/shortages

63% Inflationary pressures on your business

40% Integrated systems of care in the NHS

NB *Respondents were able to pick more than one option for this question.*

> **Workforce is the real key to a successful future.**

> **Funding needs to keep up with cost pressures.**

> **The issue is not the creation of the ICS... rather their current aspiration to bring services back into the NHS.**

Respondents feel that access to skilled workforce and overall workforce shortages remain the greatest challenge facing the independent sector. This continues the theme from last year and reinforces that, if anything, the situation has worsened, and reflects wider pressures in the healthcare system more generally. Inflationary pressures on businesses didn't appear last year but has unsurprisingly become a key issue for respondents. Finally, concerns about NHS Integrated Care Systems are still evident and reflects the difficulties respondents have had engaging with these new bodies as they have formed over the past 12 months.

Where is the impact of high inflation and low growth felt most on your business?

0%	Declining consumer confidence
54%	Pressure on wages
42%	Prices for services not keeping up with inflation
4%	Other inflationary pressures

This is a new question this year as we wanted to understand the impact of high inflation and low growth in the wider economy on independent healthcare providers. More than half of respondents (54%) feel the impact is mostly felt in pressure on wages, followed by prices for services not keeping up with inflation (42%). Interestingly, no respondents felt the impact was being seen in declining consumer confidence.

> **Our utility bills have tripled over the last 12 months.**

> **NHS Tariff (95% of our activity) doesn't reflect real life costs - predominantly wages and energy.**

How confident are you that you are on track to meet IHPN's industry-wide commitment to achieve net zero emissions by 2035 and net zero supply chain by 2045

20%	Confident
50%	Reasonably confident
23%	Not sure
7%	Not very confident
0%	Not at all confident

> **I feel more information and guidance is required here.**
>
> **Achieving net zero in our supply chain will likely be much harder if inflationary pressures continue…in terms of our business we are very much in control.**

This is another new question this year as we wanted to understand, one year on from the launch of IHPN's industry-wide net zero commitment, how confident providers are that they are on track to become net zero. Pleasingly, 70% are confident or reasonably confident that their organisation will meet this ambitious target. During the next year, IHPN will continue to provide support and subject matter expertise to all providers including the 30% who are either not sure or not very confident to help them to achieve their organisational ambitions.

How would you describe the attitude of the current government to the independent health sector from the following?

3% Very positive

50% Positive

40% Neither positive nor negative

7% Negative

0% Very negative

> **I genuinely think they also see the sector as a potential solution to the current waiting list crisis... the bigger issue is it being co-ordinated and utilised through the local NHS ecosystem.**

How would you describe the attitude of NHS leadership to the independent health sector from the following?

0% Very positive

30% Positive

47% Neither positive nor negative

23% Negative

0% Very negative

> **Their words are positive... not sure it is being followed up with clear direction and action.**

Respondents feel increasingly more positively about both the government and the NHS's attitude towards the independent health sector than they did in 2021. Over half (53%) of respondents feel very positively or positively about the attitude of the current government to the independent heath sector – an increase from 38% last year. Similarly, almost one third (30%) of respondents feel very positively or positively about the attitude of the NHS – an increase from 23% last year.

But as with last year, respondents feel more positively about the government's attitude towards the independent health sector than they do towards that of the NHS's leadership. But what comes across most is the uncertainty that many respondents feel about relations going forward. Comments suggest that this uncertainty stems from a number of places but includes the impact of new Integrated Care Systems (ICSs); the new NHS procurement regime; and the elective recovery programme - reflecting a regular issue over the last 12 months of good policy and political intent from the top not translating into good engagement locally.

> **NHS England are very positive at the centre, but it's variable at a NHS provider trust level.**

What does this section tell us?

These results show that providers are largely upbeat about all of their key markets, and even though there is slightly less positivity about their NHS funded market, the sector still sees this as a key growth area in the next 12 months.

Providers are clearly most positive about the domestic self-pay market which, as mentioned, is unsurprising given growing NHS backlogs. And with growing numbers of people considering paying privately – including many for the first time - IHPN have been developing a suite of resources to support patients and set out all the options available to them. This includes working with the Patients Association to develop an animation for patients on "How private healthcare works", including how to pay for care, how to get a referral and how to "mix and match" NHS and privately funded care.

In addition, providers are increasingly confident about the market for PMI funded services and international self-pay, with the latter recovering from the last few years' dampening effect of travel restrictions caused by the pandemic.

Regarding the market for NHS-funded services, this is very much a more mixed picture.

> **Providers still feel that NHS funded services present real growth opportunities in the next 12 months.**

Despite a more pessimistic view of the current market compared with last year, providers still feel on balance that NHS funded services present real growth opportunities in the next 12 months. This reflects both the desire and the ability of independent providers to support the NHS with recovery and reduce backlogs.

When we look at the greatest challenges that providers face, access to skilled workforce as well as workforce shortages remain consistent – a theme that emerged last year and reinforces that, if anything, the situation has deteriorated.

A new challenge for this year is of course inflationary pressures on businesses, and providers are feeling this most acutely in terms of rising wages and service costs. Over the last year IHPN have been working closely with both the DHSC and NHS England to ensure the sector is fully accounted for in any plans for support for healthcare providers with energy price rises and other cost pressures. Finally, concerns over new NHS ICSs are still evident and reflects difficulties respondents have had engaging with systems as they have begun to form over the past 12 months.

One year on from the launch of IHPN's industry-wide net zero commitment, we were also keen to hear how confident providers are that they are on track to become net zero by 2035. The majority were able to answer this question positively which reflects all the good work that providers are doing - captured in IHPN's "Clearing the air - How the independent healthcare sector is working to achieve "net zero" by 2035" report – and IHPN will continue to support members on their journey to net zero.

The survey results suggest that the sector overall feels supported by both the government and NHS England, though there is a feeling that positive rhetoric from the centre does not always translate into concrete action on the ground. As the representative body for the sector, IHPN has worked to build strong relations with the NHS leadership across the board as well as those in Government in the last year. And at a more local level, IHPN are continuing our work around engaging with new NHS ICSs and ensuring independent providers are fully factored into their plans. This includes working with ICS leaders, via the NHS Confederation ICS network, to explore what effective engagement with non-NHS partners looks like, so that best practice can be shared across all systems.

Results: The NHS

With the establishment of integrated systems of care – to what extent do you feel part of your local system? If you operate in multiple areas, then please give your general view.

3% Feel completely part of the local system

38% Feel involved in part

59% Don't feel part of the local system

These results are almost identical to last year and are disappointing, although not surprising given that these new systems are still in their infancy. Over the past 12 months, NHS ICSs have been forming, with much of their activity focussed on establishing key structures such as Integrated Care Boards (ICBs) and Integrated Care Partnerships (ICPs), as well as financial changes such as the novation of contracts from CCGs to ICBs. This has been at the same time as NHS organisations are continuing to deal with large backlogs across the board. It is clear that ICSs have a lot to do, and it could be argued that it is, therefore, not unsurprising that independent healthcare providers are finding it challenging to engage with ICSs, with less than half of all respondents feeling part of their local system and only 3% feeling completely involved. It is nonetheless still disappointing that there has not been more progress in this area. While it is perhaps still too early to draw too many conclusions on how ICSs will work with the independent sector in the longer term, we do know that these concerns and uncertainties are equally felt by non-NHS organisations including those in the voluntary and social enterprise sector.

> **Very mixed across the country, but improving slowly.**

> **Engagement has been poor, a stark contrast to the relationships developed and nurtured over the years with the CCGs.**

What impact do you think Integrated Care Systems will have on your business?

0% Very positive

7% Positive

64% Neither positive nor negative

29% Negative

0% Very negative

The formation of Integrated Care Systems this year represent the biggest changes in a decade to how NHS services are commissioned and organised. However, the survey strongly indicates that respondents are not positive about the impact of these changes on their business. Indeed, only 7% of respondents feel positively or very positively about the impact of ICSs on their organisations. The majority (almost 2/3) are undecided or don't anticipate they will have an impact, and almost a third (29%) think it will have a negative impact.

> **It's probably too early to say whether the move to ICS will have a positive or negative impact.**

To what extent do you think Integrated care Systems will improve local system working and patient care?

0% Significantly improve

44% Improve in part

26% No change

30% Worse in part

0% Significantly worsen

This is a new question for this year and respondents' views, again, reflect the uncertainty that is felt around the role and impact of Integrated Care Systems. Under half of all respondents (44%) feel that ICSs will improve patient care and local system working, whilst over a quarter (26%) feel there will be no change and almost one third (30%) feel things will get worse.

> **It will improve but is likely to take time - years not months.**

> **There is an increased sense of paralysis, however this may just be due to the early stage we are in.**

How has your relationship changed with NHS organisations in your local area in the past year? If you operate in multiple areas, then please give a general view

20% Relationships have improved

4% Relationships have deteriorated

76% A real mixed bag – some better, some worse

Answers to this question show a deterioration in relationships between independent providers and their local NHS organisations in comparison to last year. Only 20% of respondents feel that relationships have improved – this is down from 36% last year. Overall, relationships vary greatly, with 76% experiencing a mixed bag with some relationships improving and others worsening. This is up from 52% last year and reflects anecdotal feedback received by IHPN from members over the year. It also disappointingly shows that things haven't changed/improved in the past few years, despite the move to Integrated Care Systems which are designed to support more collaborative working across all provider types.

> **20% feel relationships with local NHS organisations have improved.**

What will be the principal driver of commissioner behaviour over the next few years?

63% The need to tackle NHS backlogs

37% Pressure to achieve savings

0% Implementation of NHS England and Department of Health & Social Care policy

0% Local political pressure

Respondents feel there will be just two main drivers of commissioner behaviour over the next few years – nearly two thirds (63%) feel it will be the need to tackle NHS backlogs, with the rest feeling it will be based on pressure to achieve savings. This is a more polarised position to last year when respondents felt there were other factors at play such as responding to NHS and government policy.

> **The current talk is of waiting times and lists, but the financial reality will shift the focus to efficiency.**

> **There is public pressure to tackle the backlog and political pressure to achieve savings - unfortunately these are diametrically opposed.**

What does this section tell us?

Times are undoubtedly tough in the NHS. The health service is in the middle of a period of great change, following the first global pandemic in a century which has left the system under incredible pressure.

The formation of 42 NHS ICSs and the wider implications of the Health and Care Act represents the biggest changes around how NHS services are commissioned and organised in a decade - all set against a backdrop of a growing treatment backlog. And in addition, the country is experiencing significant inflationary pressures, workforce shortages and budgetary restraint (albeit the Chancellor recently announced an additional £3.3bn for the NHS in his 2022 Autumn Statement).

This challenging backdrop is reflected in the survey results, particularly in respect to how ICSs will impact on the sector. In previous years, providers had concerns about the development of these new systems, particularly fearing that they may reduce the range and variety of providers being commissioned to deliver services in local areas.

> **59% do not feel part of their local NHS system.**

A year on and these concerns are just as relevant, fuelled by difficulties that providers have faced in engaging with ICSs, which may largely be caused by ICSs concentrating on their formation – only time will tell whether this is true. Feedback that IHPN has received from members over the past year is reflected in the survey with nearly three quarters of respondents experiencing a mixed bag with some relationships improving and others worsening. Less than half of respondents feel part of their local system and only 3% feel completely involved. Alongside this only 7% of respondents feel positively or very positively about the impact of integrated care systems on their business. Perhaps more worryingly, almost one third of respondents feel that ICSs will worsen local system working and patient care.

Despite this uncertainty, we still see some positivity amongst about a fifth of members, who feel that relationships between providers and NHS organisations in their local area has seen an improvement. In the longer term this should put these providers in good stead to be able to support commissioners to respond effectively to challenges post covid including the NHS backlogs.

As mentioned in the previous section, IHPN are continuing our work around engaging with new NHS ICSs and ensuring independent providers are fully factored into their plans. This includes working with ICS leaders, via the NHS Confederation ICS network, to explore what effective engagement with non-NHS partners looks like, so that best practice can be shared across all systems. Linked to this, IHPN have also worked hard to engage with DHSC and NHS England on the new NHS Provider Selection Regime so that local areas are able to procure additional support from the sector in an open and transparent way, and ultimately drive up the quality of care for patients.

More broadly, IHPN have been working hard to engage with NHS at all levels to ensure local areas can successfully tackle the backlog of care across all parts of the healthcare system. This includes around patient choice in the NHS, which IHPN published a report on in Summer 2022, many of the recommendations of which are now a key part of the Government's efforts to tackle the elective backlog. Likewise, IHPN have liaised closely with NHS England on their Community Diagnostic Centre (CDC) and Virtual Wards programmes to ensure local systems can make full use of the capacity and expertise of the sector in these areas.

Results: Quality, safety and workforce

What do you see as the biggest challenges in relation to quality and safety in your organisation?

88% Workforce recruitment, training and development

34% CQC's new assessment and inspection framework

27% Ongoing impact of Covid-19

NB *Respondents were able to pick their top three issues for this question.*

Overwhelmingly, respondents see that workforce recruitment, training and development is the biggest challenge in relation to quality and safety in their organisation. This mirrors our findings last year. New for this year are concerns around CQC's reforms to their assessment and inspection framework, with approximately one third of respondents raising this as a key challenge. And while we might like to think Covid is a thing of the past, over a quarter of respondents are still seeing the ongoing impact of the virus as a key challenge.

> **Since the CQC stopped doing inspections and visits, we have been desperate for the opportunity to be re-rated to demonstrate improvements from the last inspection.**

What do you see as the three key opportunities in relation to quality and safety in your organisation?

62% Workforce recruitment, training and development

58% The data agenda such as, the move to an Electronic Staff Record, Electronic Patient Record, ADAPt and PHIN

35% Embedding IHPN's refreshed Medical Practitioners Assurance Framework (MPAF)

31% CQC's new assessment and inspection framework

NB *Respondents were able to pick their top three issues for this question*

Mirroring the results around the challenges posed by workforce recruitment, training and development, tackling this issue is seen as a key way of improving safety and quality in the sector. This is followed by the data agenda, and both IHPN's refreshed Medical Practitioners Assurance Framework and the CQC's new assessment and inspection framework, all of which are areas where members have the opportunity to strengthen patient safety, quality and governance.

> **The introduction of PSIRF and the new CQC framework represent an opportunity to demonstrate high standards.**

What are the main challenges you face in relation to recruitment, retention and building workforce resilience?

> Lack of available clinical and medical personnel… we are having to recruit from overseas.

> Cost of living crisis pushing up wage inflation which is exacerbated by access to suitably qualified staff.

> Current levels of people leaving the profession… notably the cliff edge of retiring GPs over the next few years.

> The lack of a government and NHS England workforce strategy and plan plays against all of us.

> The staff exodus created by Brexit has been masked by the pandemic - now normality is returning the issue is obvious.

> It is difficult to recruit staff and to retain them - agencies are paying far more than we or the NHS are able to and where staff can also work reduced hours.

How are you trying to resolve these workforce challenges?

73%	Grow your own (apprenticeships, training and development)
65%	Employee support and wellbeing
50%	Overseas recruitment
46%	Changes to contract/benefit packages
27%	Service reconfiguration
27%	Increase training
19%	Merging role boundaries
23%	Other (please specify)

NB *Respondents were able to pick their top three issues for this question*

Respondents feel that there are four main ways to resolve these workforce challenges – growing their own through apprenticeships, training and development; employee support and wellbeing; overseas recruitment; and changes to contract/benefit packages. This mirrors last year's results on the whole, though with a greater focus on employee support and wellbeing.

> It is all of the above – the main focus on grow our own, but we also need to improve our employee value proposition to aid recruitment and retention etc

What are your organisation's aspirations in terms of training your clinical staff over the next 5 years?

96% Would expect training to increase

4% Would expect training to stay at about the same levels as now

0% Would expect training levels to decrease

The overwhelming majority of respondents (96%) expect the training of clinical staff to increase with just 4% expecting it to stay at similar levels to now. This is an increase from 2021 and demonstrates one of the ways that providers feel they can both retain staff as well as build resilience over the coming months/years.

> **To retain staff we have to give them a structure for development.**

> **In order to retain staff we need to train clinical staff across different disciplines rather than being too specialised.**

How confident are you that you will be able to increase the number of apprenticeships in your organisation over the next 12 months?

> **We have had some excellent candidates over the last 18 months to 2 years that are now permanently employed.**

19% Very confident

50% Reasonably confident

23% Not sure

8% Not very confident

0% Not at all confident

Almost 70% of respondents are very positive or positive about increasing the number of apprenticeships in their organisation. While a slight drop from last year at 72%, this still reflects the key role that apprenticeships play in member organisations, despite some members feeling the current apprenticeship scheme has some limitations.

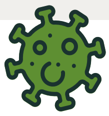
How significant an impact does Covid-19 continue to have on your organisation?

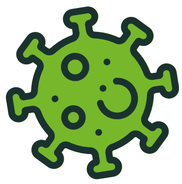
4%	Extremely significant
8%	Very significant
54%	Somewhat significant
31%	Not so significant
3%	Completely insignificant

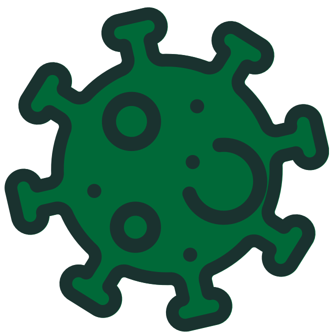
Whilst the pandemic continues to be felt across the health system, its impact has undoubtedly diminished in the past year. Only 12% of respondents felt that Covid has a very significant or extremely significant impact on their organisation, down from 50% of respondents last year. Over half of respondents (54%) do however still feel its impact is somewhat significant suggesting we are not out of the woods yet re the virus.

> **We are still experiencing higher than normal levels of patient DNAs and cancellations due to Covid.**

> **Time to move on and treat it as just another winter virus.**







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Note to editors

What does this section tell us?

These survey results demonstrate just how acute the workforce challenges are facing the independent sector (and indeed the broader healthcare system).

Staff shortages associated with Covid are still being felt and have added to the pre-pandemic issues around recruitment and retention. In addition, the rising cost of living and inflationary pressures around wages is increasing the competition for, and ability to retain, staff.

Providers overall feel there are four main ways to resolve these challenges – these include measures identified last year such as "growing your own"; overseas recruitment; and changes to contract/benefit packages. But new for this year is an increased focus on employee support and wellbeing which is seen as a key way to retain healthcare staff.

Given the scale of these challenges, IHPN have continued to support members on a range of workforce issues. This includes looking at innovative new ways we can help the sector to access specialist clinical staff, including nurses, anaesthetists, and radiographers. Brexit has impacted on the ability to recruit highly skilled workers from overseas, and in the last year, IHPN have welcomed the opportunity to continue the work with Talent Beyond Boundaries - a refugee organisation which specialise in placing clinicians in the UK. Pleasingly, around 100 refugees have been placed in IHPN members since this activity began.

We are also closely linked in with the work of the NHS Chief Nursing Officer for England, as well as the NHS Head of Nursing for Community Services to ensure that the sector is fully factored into their work to boost the nursing workforce. This is in addition to our on-going work with Health Education England to support Doctors in Training. Following the Chancellor's announcement in the Autumn Statement 2022 of a "comprehensive workforce plan" for the health service, IHPN will be building on this engagement and ensuring the needs of the sector are fully represented in this plan.

IHPN are also working on building up our knowledge and data on the independent sector workforce, as well as a better understanding of the sector's contribution to training, placements and apprenticeships so we can influence workforce policy at the highest level.

As is clear from the barometer results, independent providers expect to be delivering an increased amount of training over the next five years in acknowledgement of the challenges experienced with the recruitment and retention of staff. Indeed, since 2020, over 4,000 NHS junior doctors have undertaken training in independent facilities, and our members are currently supporting over 1,500 apprenticeships.

More broadly on safety and quality, it is currently a period of huge change in the world of healthcare regulation. As identified above, CQC is undertaking significant reform and in 2023 will be implementing a new single assessment and inspection framework. IHPN has been closely involved in this and has set up a new member reference group to discuss CQC's new regulatory approach and ensure the independent sector is fully factored into their plans. In addition, our new "Share and Learn" programme has been established to help support members to share lessons learnt from patient safety incidents and drive improvements to quality and safety of care across the sector.

In autumn 2022, IHPN also published a refresh of the Medical Practitioners Assurance Framework (MPAF) – now a core part of the CQC inspection regime as well as the NHS Standard Contract – to support members to further improve clinical governance in the sector.

Notes to editors

Over 30 senior leaders from the independent sector responded to the barometer:

61%	from hospital and acute providers
10%	from diagnostic providers
10%	from community providers
10%	from primary providers
3%	from ophthalmology providers
6%	from insourcers

Independent Healthcare Providers Network

The Independent Healthcare Providers Network (IHPN) is the representative body for independent sector healthcare providers. Our members deliver a very diverse range of services to NHS and private patients including acute care, primary care, community care, clinical home healthcare, diagnostics and dentistry.

To learn more about this document and about IHPN, please contact us.

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