



IHPN Annual Report

2025-26



Contents

The independent healthcare sector	3
About the Independent Healthcare Providers Network (IHPN)	4
IHPN in numbers	5
Chair's foreword	6
Chief executive's update	8
Annual member survey 2025/26	10
IHPN Workplan and Key achievements 2025/25	11
IHPN Scotland report	17
IHPN Wales report	18
IHPN forums and groups	19
IHPN Strategic Council	20
IHPN corporate structure	21

The independent healthcare sector

Independent healthcare providers include both for-profit and not-for-profit organisations delivering both NHS and privately funded healthcare services, ranging from large international hospital groups to small specialist providers, across almost 2500 sites across the UK.

Volume & scope

5.8 million

NHS operations, diagnostic tests and outpatient appointments delivered by independent providers

In 2024/5, there were almost

945k

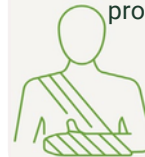
private patient admissions – the highest on record



In 2025, independent providers removed over

1.6m

from the NHS waiting list



The independent sector delivers



1/2 of NHS ADHD assessments

1/3 of NHS autism assessments



42%

of NHS community service providers are from the independent sector

5 million +



NHS + private scans & tests delivered by independent diagnostics providers

Workforce

IHPN members employ or contract more than

150,000
people



5,000+

doctors, nurses and other health professionals trained



600+

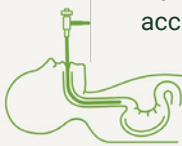


Freedom to Speak Up Guardians in the independent health sector

Quality & safety

98

independent sector providers are Joint Advisory group (JAG) accredited



48%

of all JAG accredited sites in the UK

7 of the top 10

providers for both hip and knee adjusted health gain are from the independent sector



72



independent providers hold the Macmillan Quality Environment Mark for cancer care

98%

of NHS inpatients treated by independent providers would recommend their provider to friends or family



92%

of acute and community independent providers are rated either good or outstanding by the Care Quality Commission





About the Independent Healthcare Providers Network (IHPN)

Our Mission

IHPN is the membership network for independent healthcare providers. We play a leading role in the sector by bringing independent providers together, representing their interests, and supporting them to deliver great care to patients.

Our Vision

A thriving independent healthcare sector delivering great care to NHS and private patients.

Our Network

We have over 120 members that range in both size and the types of services they provide:



Scale – From the largest independent healthcare providers to smaller organisations



Services – The full range of clinical services including primary, community, diagnostics, hospital and specialist provision



Sector – Delivering great care to both NHS and private patients

IHPN in numbers 2025/26

Membership



IHPN members

123

7 more than 2024/25

IHPN
Commercial
Associates
adding value
to our
network



45

Engagement

1,983



Member attendees at IHPN
events and meetings



>93%

Membership renewal rate



29

Member visits building
connection and
understanding

Profile and impact



**4.6/5 record
attendee rating
for IHPN annual
summit**

Speakers included NHS
England COO Dame Emily
Lawson



40%

increase in LinkedIn followers
reaching **190k+** individuals



134

Media mentions

53

provider signatories
to IHPN Net Zero
commitment



5 major new reports

- Community providers at scale
- Building Better Health
- Going Private 2025
- Quality & Safety 2025
- Registered Manager's Handbook



1 award win

Bronze Award for Best
Longstanding Event" at
the Association
Excellence Awards





Chair's foreword

Seema Kennedy OBE

I'm delighted to present IHPN's Annual Report for 2025/26

This is now my fourth year as Chair of IHPN, and it continues to be a real privilege to represent an industry that delivers such high quality, life-changing care to millions of patients every year. In all my visits and interactions with members over the last 12 months, the commitment to patients and the desire to deliver the best possible care is palpable and seeing it first-hand continues to be a real joy.

For an industry as prominent as the independent healthcare sector – and with an estimated value of £21 billion - it's vital that independent healthcare providers have effective representation with a clear place for the Government, the NHS, regulators, and other stakeholders to engage with the sector on a collective basis.

This last year has made the case for this collective working in an unprecedented way. In 2025/26, we've had to navigate the new leadership at NHS England, the significant financial and operational challenges facing the health service, as well as ensuring that the independent sector is fully included and reflected in the Dash review of healthcare regulation plus the 10 Year Plan.

IHPN have represented the sector in some hugely testing times and it's testament to the hard work of the team that member satisfaction has actually gone up in the past year, against such a challenging backdrop.

"it continues to be a real privilege to represent an industry that delivers such high quality, life-changing care to millions of patients"

Indeed, it's been heartening to see our network grow in the last year, including welcoming a whole new subset of members delivering neurodevelopmental services into the IHPN fold – organisations who are playing a key role in providing services in what has traditionally been an under-served area.

While we don't underestimate the significant challenges in the NHS market, the last year has seen record levels of care delivered by the independent sector across all treatment areas, with ongoing commitment to make better use of the sector, whether that's in terms of modernising NHS diagnostics and creating the next round of Community Diagnostics Centres, or the development of new Neighbourhood Health Services.



Chair's foreword

Seema Kennedy OBE

These last twelve months have also seen the private market continue to thrive, with IHPN leading the way on providing insight and analysis on this issue through its “Going Private” research which is consistently cited in the national media, with the network also playing a core part in successfully heading off proposals to apply VAT to private care last summer. IHPN is also playing an ever greater role in promoting private healthcare globally with our Healthcare London initiative going from strength to strength and achieving tangible growth in demand for the capital's services from the Middle East in the last year.

“It's testament to the hard work of the team that member satisfaction has actually gone up in the past year, against such a challenging backdrop.”

The bedrock of this offer to patients is of course the high-quality, safe care that is delivered across the sector. Our latest analysis shows that 94% of IHPN members are rated Good or Outstanding by the CQC, a real achievement given the current pressures on services and a demonstration of the sector's ambition and drive to improve.

IHPN exists on behalf of its members, and I'd like to thank the IHPN Strategic Council for their positive contributions over the past year. I'd also like to thank IHPN CEO, David Hare, for his sterling leadership that is recognised not only by members but also the wider healthcare community. David couldn't do this without the fantastic work of the IHPN team, to whom I pray tribute.

2026/27 will bring a range of both challenges and opportunities, but I hope this report makes clear that IHPN, with the support of its members, is in a good position to ensure that the independent healthcare sector can thrive and play its part in making a positive contribution to UK healthcare.

A handwritten signature in black ink, appearing to read 'SK'.

Seema Kennedy OBE
Chair, IHPN

Chief Executive's update

David Hare MBE



While it's somewhat of a cliché to say that every year in healthcare can feel like a "year of change", there's no doubt that the last 12 months has signalled a real period of transition.

With another record breaking year in terms of private healthcare activity and health insurance coverage, to the announcement that NHS England will be abolished and subsumed into the Department of Health and Social Care, to the Dash review into healthcare regulation and the 10 Year Plan for Health, there's been a lot for independent healthcare providers to grapple with.

Looking at the private market, it's clear that "going private" for healthcare treatment has become well and truly normalised across all parts of society, with over 7 in 10 people now openly considering using private healthcare - a sentiment which holds across all ages, social grades and regions. Looking to the future we can now say with confidence that healthcare in the UK will be a plural model with patients choosing the best care for their needs whether funded by the NHS or privately.

We were delighted to be a major contributor to Sir Charlie Mayfield's "Keep Britain Working" review which highlighted the growing recognition of the important role that employers have to play in keeping their staff healthy.

The sector already plays a key part in this through the delivery of much-needed occupational health and employee wellbeing services, as well as meeting the needs of the rising number of patients now accessing care through their employer-provided private medical insurance and as the report makes clear, there will be further opportunities to do so in the years ahead.

Beyond promoting the benefits of private healthcare, the IHPN team have also been working behind the scenes to sort some of the "plumbing" that is inhibiting patients from mixing and matching private and NHS healthcare – including for those with private cancer diagnoses which will no doubt save many thousands of lives.

"it's clear that "going private" for healthcare treatment has become well and truly normalised across all parts of society"

Chief Executive's update

David Hare MBE



In terms of the NHS market, the significant financial and operational challenges facing the NHS this year have meant it's been a bumpy road, which is having a real impact on the sector's ability to deliver much needed patient care and support the wider healthcare recovery. In light of this, we want to put on record our thanks to members for their constructive insights and intelligence over the last 12 months which has been invaluable in enabling IHPN to represent you at the highest levels in Government and the NHS. And while this has by no means been an easy year, overall I'm proud that the sector has continued to deliver record amounts of NHS care in 2025/26, with many exciting opportunities ahead including in the health service's work to increase diagnostics capacity in the community and invest in new Neighbourhood Health Services.

IHPN's Regulation team continues to go from strength to strength, supporting our members at a time when the wider regulatory environment is in a state of flux. This year our annual Patient Safety conference with the Care Quality Commission and Health Services Safety Investigations Body had yet another record turnout, with further bespoke events for Registered Managers and Patient Safety Specialists in the sector. We also published our first ever Handbook for Registered Managers working in independent providers.

We have already had some fantastic member feedback on what an invaluable resource it is.

It's undoubtedly been a busy year for both IHPN and the wider membership which makes it particularly heartening to see that member satisfaction has gone up in the past year. To achieve a Net Promoter Score of +64% (anything over 50% is considered outstanding) is a real achievement for the IHPN team and can only be done with the full support of our members.

In recognition of the continuing tumultuous times ahead, we have also been working in recent months to develop our new three-year strategic plan to take us up to the end of the decade. This included the most comprehensive member survey we have ever commissioned, with over 9 in 10 members making clear that IHPN membership is value for money, and that the organisation is well positioned to steer the sector through the important challenges in the coming years.

As we end another membership year, I'd like to thank our Chair Seema Kennedy for her invaluable leadership, and to the IHPN team for another fantastic performance over the past 12 months.

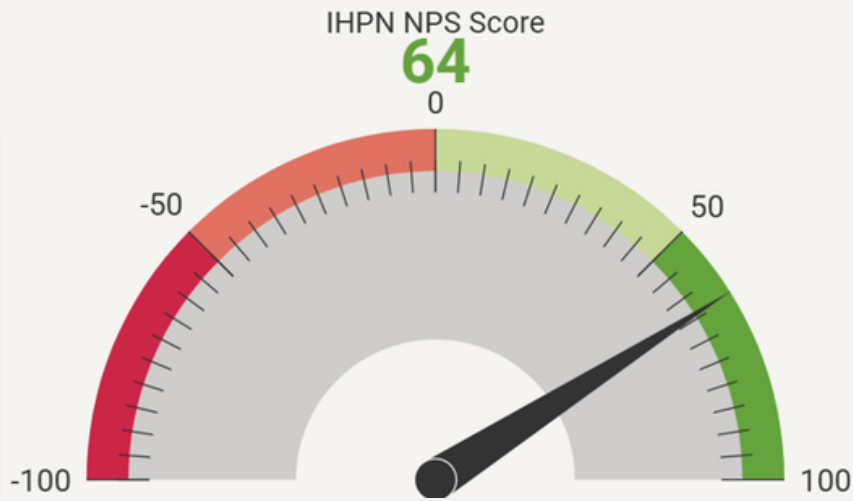
A handwritten signature in blue ink that reads "David Hare".

David Hare MBE

Chief Executive IHPN

IHPN Member Feedback – 2025/26

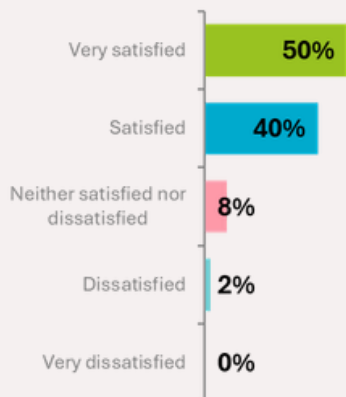
How likely is it that you would recommend IHPN to a friend or colleague?



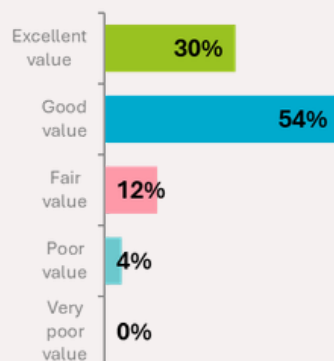
As part of our annual Industry Barometer survey, conducted in January 2026, we asked members how likely is it that they would recommend IHPN to a friend or colleague. This led to a Net Promoter Score (NPS - a widely used benchmark of customer satisfaction) of +64. This score is an increase on last year's score of +53 and remains an extremely positive score given results above +50 are rated as outstanding in most UK industries.

In 2025 we also commissioned the Customer Closeness Company to undertake a research study into members' views of IHPN, with 50 members surveyed.

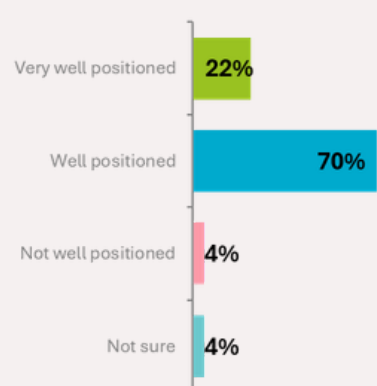
90% of respondents were satisfied/very satisfied with their membership



96% say IHPN membership is fair, good or excellent value for money



91% say IHPN is well/v well positioned to support them with important challenges over next three years





IHPN workplan 2025/26

IHPN's workplan for 2025/26 was agreed by the Strategic Council and signed off by members at our 2025 AGM. Our core objective is to continue the journey of normalising independent healthcare for both NHS and private patients by:

- 1 Promoting the quality and safety of independent sector healthcare
- 2 Promoting the contribution of independent sector healthcare to the wider UK health system and economy
- 3 Securing an important role for independent providers within the NHS
- 4 Driving improvement in the accessibility of private healthcare to patients
- 5 Navigating a change of government and ensuring a strong political position for the industry

2025/26 saw excellent progress in our focus areas with key achievements outlined on the following pages.



Promoting the quality and safety of independent sector healthcare

- Influenced Dr Penny Dash's reviews into the patient safety landscape through membership of its expert advisory group, leading to the views of the sector being reflected in the final reports.
- Published our second Patient Safety and Quality national report and held our award-winning 6th annual IHPN CQC Patient Safety Conference demonstrating the sectors commitment to safety and quality.
- Continued to drive improvements across the clinical data landscape leading to trial access to the National Consultant Information Programme (NCIP), enabled early exploration to the Learning from Patient Safety Event (LFPSE) experimental data and inclusion at programme board level of the Outcomes Registry Programme (ORP).
- Engaged with the National Institute for Health and Care Research (NIHR) looking at the clinical governance interface between NHS and independent hospitals applying challenge at all stages
- Increased the national influence of independent sector clinical leaders through forums, events and dinners with senior national leaders resulting in independent sector representation on national steering groups including NMC, GMC and CNO England.



Promoting the contribution of independent sector healthcare to the wider UK health system & economy

- Worked with Sir Charlie Mayfield's Keep Britain Working review team to promote the role of the sector in the delivery of occupational healthcare and other services to support the health of employees, contributing to the broadening of who can provide these services. In addition, enabled several member organisations including IHPN to become one of the Review's key vanguard organisations.
- Published the high-profile IHPN Industry Barometer providing key insights about market trends, which has been used consistently in the media.
- Created a natural home for women leaders in independent healthcare by the introduction of a series of networking events alongside practically supporting the development of women working in the independent healthcare sector by the launch of IHPN's mentoring scheme.
- Supported members' contribution towards a net zero health sector through the delivery of the industry Net Zero commitment by bringing together subject matter expertise and sharing of best practice – which is actively leading to the reduction in the sectors carbon footprint.



Securing an important role for independent providers within the NHS

- Engaged with NHS England on behalf of the sector on the development and implementation of changes to the NHS Payment Scheme and contracting mechanisms – leading to the removal of the upfront payment caps policy.
- Played a key role in the development of the NHS 10 Year Plan highlighting the importance of independent providers in delivering NHS care, leading to a plan based on “greater plurality of provision” and a clear role for the sector.
- Lobbied for quality, timely data in community services leading to NHS England publishing monthly national waiting times.
- Ensured that NHS pay uplifts were reflected in normal funding mechanisms.
- Lobbied for greater use of the sector in any future phase of the Community Diagnostic Centre programme and diagnostics more generally, leading to a market engagement which aims to increase the number of independent sector delivered tests and scans by an extra 2 million over two years.
- IHPN took on a whole new subsector into its membership - independent providers of NHS neurodevelopmental services, achieving meaningful engagement with NHS England and a clear commitment to be part of the delivery group responsible for implementing the taskforce report.



Driving improvement in the accessibility of private healthcare to patients

- Established ourselves as the leading source of intelligence on private healthcare through the publication of our Going Private 2025 report which was covered exclusively in the mainstream media. This includes on the Times online (with 2.4m unique visitors per month) as well as in the print copy on the Saturday Times (with a readership of 366k).
- Promoted the growing market for private diagnostics tests and scans through our first “Going Private: Diagnostics” report covered in the Times, Spectator and Evening Standard.
- Led a delegation of London-based hospitals to Saudi Arabia as part of our Healthcare London initiative promoting London as a destination for high-end, complex care, with an increase from 20.7% market share in 2020 to 25.5% in 2024, overtaking Germany as the second-most popular international referral destination.
- Improved the interoperability between the NHS and independent sector around cancer referrals – securing a change to NHS guidance to ensure systems have processes in place to enable direct referrals from the Independent Sector where there is suspected cancer.



Navigating the change of government and securing a strong political position for the industry

- Publicly opposed a proposal for VAT to be introduced on private healthcare in the national media alongside a widerange of commentators – securing a confirmation from Government that it is not being considered “at all”.
- Navigated the Budget ensuring there were no changes to VAT, Insurance Premium Tax and Limited Liability Partnerships.
- Worked with the DHSC on joint media stories to promote how the sector is delivering record amount of NHS care.
- Promoted the role of the independent sector in cutting the NHS waiting list in local constituencies.
- Hosted a successful event in Parliament with the Patients Association and Arthritis UK to promote NHS Patient Choice,with more than 50 people in attendance and the opportunity to talk to MPs from all parties, including the shadow Health spokesperson and the PPS (Parliamentary Private Secretary) to Wes Streeting.
- Working with the DHSC’s Bill team on the forthcoming health legislation to ensure the sector is able to positively contribute.
- Working alongside business groups to ensure the impact on patients is fully understood around the Employment Reform Act.



IHPN Scotland represents independent acute and mental health providers across Scotland and is chaired by Ken Hay, Hospital Director at Nuffield Health Edinburgh Hospital.

The network brings together providers and healthcare professionals to support engagement in public healthcare policy, with members making significant contributions to workforce development, patient activity, and safety and quality.

The network holds quarterly meetings with key stakeholders, including the Scottish Government, the General Medical Council, and Healthcare Improvement Scotland, alongside annual meetings with Scotland's Chief Nursing Officer to support education, training, and placement opportunities.

During the year, IHPN Scotland continued with its planning to contribute to national initiatives such as the Scottish Government's Scan for Safety programme. This programme aims to enhance the traceability of medical devices through point-of-care scanning and digital data capture and will ultimately cover all medical devices implanted intraoperatively wherever the procedure is undertaken. The network continues to prioritise increasing independent sector involvement in audits such as the Pelvic Floor Registry.

IHPN Scotland is also represented on Healthcare Improvement Scotland's (HIS) External Review Group which during 2025 undertook a detailed review of HIS's regulatory assurance functions, including Independent Healthcare and IRMER regulation. Through this representation, IHPN Scotland helps to inform and shape HIS's strategic approach to regulation, improving safety and quality of care and aligning with HIS priorities.

Looking ahead, the network will continue work on adapting the Medical Practitioners Assurance Framework for Scotland and will be represented on the Scottish Government's Nursing and Midwifery Taskforce to support sustainable workforce change



IHPN Wales is the representative body for independent healthcare providers in Wales and is chaired by the Chief Executive Officer of St Joseph’s Hospital, Stuart Hammond.

IHPN Wales members continue to make a meaningful contribution to the Welsh healthcare system. This includes supporting workforce development and education, delivering high-quality patient care, and providing services that are valued by patients.

IHPN Wales meets on a quarterly basis, including two joint meetings each year with the Chief Nursing Officer for Wales, the Welsh Government, and Healthcare Inspectorate Wales.

The Welsh Government continues to engage constructively with the independent sector across a range of policy and regulatory matters, including ongoing discussions relating to workforce development and staff education.

IHPN Wales is represented on a number of external stakeholder and advisory groups, including the Registered Nurse Associate Band 4 Project and the Welsh Nursing and Midwifery Committee. This engagement supports effective collaboration and influence across the wider healthcare system. In addition, IHPN Wales is collaborating with Digital Health and Care Wales to progress opportunities for member organisations to access the Welsh Clinical Portal, strengthening access to patient summary care records and enhancing patient safety.

IHPN’s Director of Regulation, Dawn Hodgkins, and the Head of Patient Safety and Quality Governance, Linda Jones, continue to work closely with the Welsh network to ensure effective representation across all sectors and to strengthen communication, coordination, and collaboration across the IHPN Wales membership.

IHPN Forums and Groups

IHPN's forums and groups are at the heart of our mission to bring all types of providers together. In 2025/26 our existing groups have gone from strength to strength with increased attendance and a vibrant work programme across all our areas of work.

Cancer group

Clinical Diagnostic
& Imaging

Clinical Forum

CNOs / CMOs

Communications Group

Critical Care

Diagnostics

Digital Leaders

HR Forum

Insourcing

Infection, Prevention
& Control

Legal Counsel

Net Zero

Neurodevelopmental

NHS Primary and Community

Pharmacy

Private Primary

Share and Learn

Specialist Ophthalmology

Women Leaders Network

IHPN Strategic Council

IHPN’s Strategic Council agrees our annual business plan and sets our strategic agenda. The Council meets four times a year and is currently made up of the following member organisations. The number of meetings attended by each organisation is set out below.



Circle Health Group
CEO, Paul Manning [3]*



Cleveland Clinic London
President, Dr Robert Lorenz [4]



Cora Health
CEO, Mike Turner [3]**



Diagnostic Healthcare
Chief Executive Officer
Liat Karni [4]



Genesis Care
CEO – UK and Europe,
Justin Hely [3]



HCA Healthcare UK
UK President and CEO,
John Reay [3]



Horder Healthcare
Chief Executive,
Elin Richardson [4]***



HCRG
Executive Chair,
Stephen Collier [4]



IHPN
Chair, Seema Kennedy OBE
[4]



IHPN
CEO, David Hare [4]



IHPN
Clinical Director,
Dr Howard Freeman [4]



InHealth Group
Chair, Richard Bradford [4]



Nuffield Health
CEO, Alex Perry [4]*



One Medical Group
Co-Founder & Executive Chair
Rachel Beverley-Stevenson [4]



Paloma Health
Co-founder & Executive Chair,
Darshak Shah [4]



Practice Plus Group
CEO, Jim Easton [4]



Ramsay Health Care UK
CEO, Nick Costa [4]



Spire Healthcare
CEO, Justin Ash [3]



SpaMedica
CEO, Richard Woodward
[4]



The London Clinic
CEO, Al Russell [4]



Vanguard Healthcare Solutions
Chairman & CEO,
Dr Graham Rich [4]****

*Circle Health were represented by Karen Prins from April - July 2025
**Cora Health were represented by Andrew Walton from April - July 2025
***Horder Healthcare were represented by Richard Tyler from April - May 2025
****Vanguard Healthcare Solutions were represented by Chris Blackwell-Frost from April - November 2025.

IHPN Board of Directors

In line with the Articles of Association, IHPN has four Directors. In 2024/25 the Directors met three times.



Seema Kennedy OBE
Chair, IHPN



Richard Bradford
Chair, InHealth Group

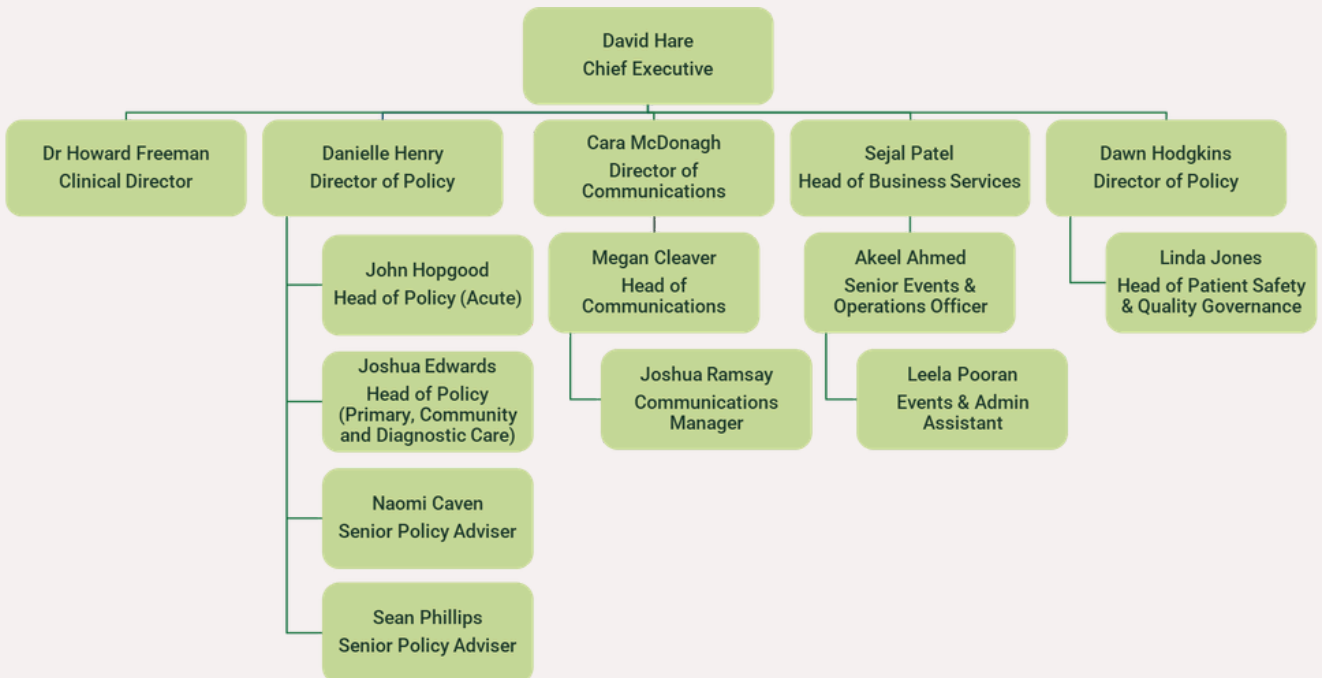


Jim Easton
Chief Executive,
Practice Plus Group



David Hare MBE
Chief Executive, IHPN

IHPN team





Independent Healthcare Providers Network
84 Ecclestone Square
London SW1V 1PX

©Independent Healthcare Providers Network (IHPN)

You may copy or distribute this work, but you must give the author credit, you may not use it for commercial purposes and you may not alter, transform or build upon this work.