

DRIVING DIAGNOSTIC CAPACITY THROUGH PARTNERSHIP

The Critical Role of OEMs and Independent Providers in Expanding Community Diagnostic Services

A Joint Discussion Paper from AXREM and IHPN

1. Executive Summary

The NHS faces unprecedented demand for diagnostic services. Growing waiting lists, increasing complexity of patient pathways, workforce pressures and rising demand associated with an ageing population require innovative approaches to diagnostic delivery. Community Diagnostic Centres (CDCs) have emerged as a cornerstone of the NHS's strategy to improve access, reduce waiting times and bring diagnostic services closer to patients. While policy attention has rightly focused on the expansion of CDCs, their success is underpinned by a unique partnership between the NHS, independent healthcare providers and original equipment manufacturers (OEMs). This paper highlights how collaboration between independent healthcare providers and OEMs is helping to improve productivity, increase diagnostic capacity, accelerate innovation and enhance patient experience across the UK. It argues that continued partnership, supported by long-term policy certainty and collaborative planning, will be critical to meeting the NHS's diagnostic ambitions over the coming decade.

2. Introduction

Diagnostics underpin approximately 85% of clinical decisions^[1] and are essential to the delivery of safe, effective and timely patient care. However, demand for diagnostic services continues to outpace capacity, creating challenges across the healthcare system.

Community Diagnostic Centres represent an important innovation in healthcare delivery. By providing access to a wide range of tests and scans outside acute hospital settings, CDCs are reducing pressure on hospitals while improving convenience and accessibility for patients. They have been highlighted by the government as key drivers of their ambitions to reduce diagnostic waiting lists in the National Cancer Plan and form a central plank in the development of the NHS' proposed Neighbourhood Health Service, helping shift care from hospitals into the community.

[1] NHS England Board paper 2020 citing that diagnostic activity forms part of over 85% of clinical pathways

Delivering this transformation requires more than new buildings and equipment. It equally depends upon a razor-sharp focus on productivity, well-integrated pathways and effective collaboration between multiple stakeholders, particularly:

- Independent healthcare providers who deliver diagnostic services, workforce expertise, operational capacity and flexible service models.
- OEMs who provide advanced imaging technologies, digital solutions, maintenance services, training, innovation and long-term infrastructure support.

Together these sectors are making a significant contribution to diagnostic capacity across the NHS.

3. The Independent Sector's Contribution to Diagnostic Capacity

Independent healthcare providers have become an increasingly important partner in supporting NHS diagnostic delivery. Their contribution includes:

Additional Capacity

Independent healthcare providers deliver millions of NHS-funded diagnostic procedures each year, helping to address demand that cannot currently be accommodated within NHS facilities alone. Primarily sourced data suggests that independent healthcare providers are delivering around 4 million tests a year for the NHS, including 1 in 3 of all MRIs and nearly half of all PET-CT scans.^[2]

Through dedicated diagnostic facilities and mobile solutions, the independent healthcare sector can provide capacity quickly and flexibly in response to local need.

Improved productivity

Independent provider-led CDCs have a clear focus on productivity through improving throughput, maximising scanner utilisation, reducing unnecessary downtime and prioritising patient engagement to limit Did Not Attends (DNAs). This is exemplified by primary sourced data from IHPN members which suggest that an independent healthcare provider run MRI can deliver around 9000 tests a year.^[3]

Operational Flexibility

Independent providers often operate extended opening hours, weekend services and innovative staffing models that maximise scanner utilisation and patient throughput. These approaches can support NHS systems seeking to reduce diagnostic waiting times while maintaining high standards of patient care. As capacity continues to expand, ensuring equitable access for patients in deprived and rural communities will remain an important consideration.

[2] IHPN, 'The Missing Picture: Why NHS Data Underestimates the Independent Sector's Role in Diagnostics' (August 2026): independent sector providers delivered around 4 million NHS scans in 2025/26, including over 30% of MRI scans (1 in 3) and just under half of all PET-CT scans nationally.

[3] Source: IHPN member data (2026), collated from IHPN member organisations. This is internal IHPN data and not currently drawn from a published external source.

Workforce Support

The diagnostic workforce remains one of the most significant constraints on capacity growth. Independent providers contribute skilled radiographers, radiologists, sonographers, clinical scientists and support staff who supplement national workforce resources and help maintain service continuity. Many providers also support training, either independently or as part of wider NHS and university-led training circuits

Supporting Community-Based Care

Many independent sector organisations are already delivering services from community settings, bringing diagnostics closer to patients and supporting the shift from hospital-centred care to neighbourhood-based healthcare. CDCs such as Alliance Medical's centre in Northampton, InHealth's centre in North Solihull or Medical Imaging Partnership's centre at the Amex Stadium in Brighton (where over 89% of patients are scanned and reported within seven days^[4]) are all located at the heart of their communities, helping to refocus healthcare from hospitals nearer to home.

4. The Role of OEMs in Enabling Capacity Growth

While scanners and diagnostic equipment are the most visible contribution of OEMs, their role extends significantly beyond technology supply.

Accelerating CDC Delivery

Manufacturers have played a central role in designing, equipping and commissioning Community Diagnostic Centres across the country. Many CDCs have been delivered within challenging timescales due to close partnerships between NHS organisations, providers and equipment manufacturers.

[4] IHPN, *Dialling up diagnostics: The vision for Phase Two of Community Diagnostic Centres* (September 2024)

Technology Innovation

Modern diagnostic technologies offer substantial productivity gains through:

- Faster scan acquisition
- Improved image quality
- Advanced automation
- Artificial intelligence-assisted workflows
- Reduced repeat examinations
- Streamlined reporting pathways

These innovations enable more patients to be seen each day while supporting clinical quality and safety.

Service and Maintenance Support

Equipment uptime is critical to diagnostic capacity. OEMs provide preventative maintenance, remote monitoring, technical support and rapid-response engineering services that help minimise downtime and maximise service availability.

Workforce Development

Manufacturers invest heavily in:

- Clinical application specialists
- Training programmes
- Continuous professional development
- Academic partnerships
- Technology adoption support

These activities help ensure that healthcare professionals can fully utilise emerging technologies and achieve the greatest benefit for patients.

5. Providers and OEMs working in partnership

Due to their scale, independent sector healthcare providers have deep "Value Partnership" arrangements with OEMs providing preferential pricing, lifecycle maintenance & technology upgrade arrangements and staff training across their installed asset base. The advantages of

these arrangements enable independent sector healthcare providers to deliver state-of-the-art services to the NHS at great value to the taxpayer. The international footprint of OEMs and many independent sector healthcare providers combined can also help the NHS to benefit from best practice models of care globally, in terms of outcomes, access and care delivery. These arrangements increasingly sit alongside evolving NHS commissioning routes, including the Provider Selection Regime and simplified DDC-style funding mechanisms, which are reshaping how independent sector capacity is procured and funded within local systems.

Some areas for further opportunity through OEM/independent sector healthcare collaboration may include, for example:

- Designing for productivity from the outset into new facilities
- Protocol optimisation and technology adoption
- Optimising performance and patient flow
- Workforce development
- Innovation at scale

6. Community Diagnostic Centres: A Model of Successful Partnership

The CDC programme demonstrates the value of collaboration between suppliers, providers and the NHS. The most successful centres combine:

- NHS leadership and patient pathways
- Independent sector operational expertise
- Industry innovation and technology
- Local workforce development
- Data-driven service design

This partnership model enables rapid deployment of services while maintaining a focus on quality, efficiency and patient outcomes.

Importantly, CDCs have demonstrated that care can be delivered closer to home without compromising quality or safety. Patients benefit from more convenient access, reduced travel times and a streamlined diagnostic experience.

7. Beyond Equipment: Creating Sustainable Diagnostic Ecosystems

Meeting future demand requires a longer-term view of capacity. Sustainable diagnostic ecosystems depend on:

Strategic Workforce Planning

Capacity growth cannot rely solely on increasing equipment numbers. Workforce planning must be integrated into future diagnostic strategy, with collaboration between education providers, healthcare organisations, and industry partners.

Digital Integration

Technology vendors and providers are increasingly working together to deliver integrated digital solutions that connect diagnostic systems, reporting platforms, patient records, and AI-enabled decision support tools.

With the NHS's recent focus on the expansion of the NHS App as the 'front door' for accessing healthcare, alongside the development of the NHS Online Hospital, it is vital that CDCs and providers are fully integrated into digital developments, to ensure patients can make informed choices about where to receive their scans and treatment. As diagnostic data increasingly flows between NHS, independent sector and OEM systems, robust cyber security and information governance will be essential to maintaining patient safety and public trust in these cross-sector pathways.

Innovation Adoption

The UK has an opportunity to become a global leader in diagnostic innovation. Faster adoption

of proven technologies can improve productivity, enhance patient pathways, and deliver better value for taxpayers.

Long-Term Investment

Sustained investment in infrastructure, equipment replacement programmes, workforce development, and digital transformation will be necessary to meet future demand. In its recent market engagement with the independent sector, NHS England's diagnostic demand and capacity modelling estimated that 35% of the capacity required between 2026/27 and 2028/29 needs to come from the independent healthcare sector. This equates to an estimated additional 2 million tests^[5] and could be achieved through either capacity or productivity initiatives, including digital infrastructure and tools.

8. Recommendations

To maximise the contribution of independent healthcare providers and OEMs to diagnostic capacity, AXREM and IHPN recommend :

Strengthen Collaborative Planning

National and regional healthcare leaders should engage providers and industry partners earlier in diagnostic service planning and CDC development programmes. Planners should consider how independent provider-led CDCs can add value and capacity to the system in future waves of expansion.

Focus on Whole-System Capacity

Capacity planning should consider workforce, equipment, digital infrastructure and patient pathways collectively rather than as separate challenges, with patient choice and access key components of capacity planning.

Accelerate Innovation Adoption

The NHS should create clearer pathways for evaluating and implementing technologies that demonstrably improve productivity and patient outcomes.

Support Workforce Growth

Government, NHS organisations, providers and industry should work together to address workforce shortages through expanded training, professional development and recruitment initiatives.

Develop Long-Term CDC Strategies

The next phase of CDC development should focus on sustainability, productivity and integration with wider diagnostic networks.

[5] Department of Health & Social Care, 'Independent Sector Collaboration in Diagnostic Service Transformation', Find a Tender notice 2025/S 000-075632, published 20 November 2025.

Emphasise the importance of transparency to good performance

The Government and NHS should publish data on CDC performance and productivity, to help system understanding of available capacity and CDC efficiency. This should be used to inform support programmes and, where necessary, recommissioning processes where CDCs are performing poorly.

Develop suitable financing and partnership models to accelerate efficiency and innovation

Current adoption of IFRS16 and CDEL creates barriers to partnership between the NHS, independent healthcare providers and OEM's within existing infrastructure. This in turn hinders the NHS from achieving meaningful gains in productivity, especially where services are managed by NHS resource instead of being outsourced. Further evaluation of how accounting rules impact the potential benefit of partnerships, including public-private partnerships (PPPs)^[6], is needed to ensure we can support a growing need for diagnostic infrastructure that is fit for the future and can be implemented alongside transformation services to optimise existing pathways.

Conclusion

The challenge of reducing diagnostic waiting times and meeting growing demand cannot be solved by any one organisation acting alone.

Community Diagnostic Centres have demonstrated what can be achieved when the NHS, independent healthcare providers and OEMs work together towards a common goal. Independent healthcare providers contribute capacity, expertise and operational flexibility, while OEMs provide the technology, innovation, training and infrastructure that enable modern diagnostic services to thrive.

Together, these partnerships are helping to transform diagnostic delivery across the UK. By strengthening collaboration and maintaining a shared focus on patients, we can build a diagnostic system that is more accessible, more productive and better equipped to meet the healthcare challenges of the future.

About AXREM

AXREM represents over 130 suppliers of diagnostic medical imaging, radiotherapy, healthcare IT and care equipment technologies. Our members provide the innovations and services that underpin modern healthcare delivery across the UK.

About IHPN

The Independent Healthcare Providers Network (IHPN) is the representative body for over 120 independent healthcare providers of services ranging from acute, primary, community, neurodevelopmental, mental health, and diagnostics. We bring together providers from across the sector, champion high-quality patient care, and work with governments, the NHS and partners to help the independent sector make a positive contribution to UK healthcare.

[6] IHPN, [Building Better Health](#) (November 2025)