Healthcare Construction Market Report - UK 2019-2023

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Introduction and Overview

The 8th edition of the **'Healthcare Construction Market Report - UK 2019-2023'** focuses on major construction projects and market trends in both the public and private healthcare sectors, which should be of particular interest to healthcare providers and construction professionals in the healthcare sector.

Key issues covered in the report:

- Analysis of continued Government reform of the NHS including a review of funding, measures and new models of care outlined in the NHS Long Term Plan.
- Major construction contractors, developers, primary care property companies and investors involved in the healthcare sector.
- Healthcare funding - analysis of both resource and capital spending levels to 2024, including the long-term funding settlement for the NHS.
- Detailed assessment of healthcare construction output, new orders and projects together with estimated forecasts for growth to 2023.

Areas of particular interest include:

- Future opportunities for healthcare sector work and key issues for the construction industry. The Government's forward pipeline includes £4.9bn worth of healthcare capital projects taking place between 18/19 and 2020/21.
- The NHS will be driven by the development of Primary Care Networks (PCNs) - multi-disciplinary teams of health professionals working at a local level to deliver patient care. We review the GP estate and funding options to upgrade premises.
- The NHS continues to see a shift away from hospital-based provision towards a community-based model of care.
- following the Government's announcement that it will no longer use PFI and PF2 contracts to fund infrastructure projects, we assess the implications for the NHS and Healthcare Procurement.

Some of the companies included:

Aspen Healthcare, Aspire Defence, BAM, Barnet Enfield and Haringey Mental Health NHS Trust, BMI Healthcare, Benenden, Brymor Construction, Chelsea & Westminster NHS Trust, Circle, Classic Hospitals, Defence Infrastructure Organisation, Fairfield, Galliford Try, Great Ormond Street Hospital NHS Trust, HCA International, Hospital Management Trust, HUB North Scotland, IHP, Interserve, John Graham, John Sisk, Kier, Laing O'Rourke, Liverpool City Council, Liverpool Women's NHS Foundation Trust, Manchester University NHS Foundation Trust, McLaughlin & Harvey, Milton Keynes University NHS Trust, NHS Greater Glasgow and Clyde Health Board, NHS Scotland, Nuffield Health, One Healthcare, Plymouth Hospitals NHS Trust, Ramsay Healthcare, Robertson Construction, Royal Liverpool and Broadgreen Hospital NHS Trust, Sandwell & West Birmingham NHS Trust, Spencer, Spire Healthcare, St Bartholomew's Hospital, St. Hugh's, The Cleveland Clinic, University Hospital Southampton NHS Trust, Vinci, Willmott Dixon, York Teaching Hospital NHS Foundation Trust, and more.

Construction Output in the Healthcare Sector

- Overall Construction Output - Total Construction Output to 2023; Construction Output by Sector.
- Value of Construction Output and New Orders in the Healthcare Sector.
- Market Prospects for Healthcare Construction Output.
- Overview of the UK Healthcare Planning & Development Pipeline.
- Healthcare Contracts - Analysis of healthcare contracts at all stages of the construction pipeline; contracts awarded by Region in 2018.
- Regional Healthcare Activity and Development Pipeline - South East; London; Scotland; North West; East Midlands; South West; West Midlands; Yorkshire & Humber; East England; North East ; and Wales.

Public Sector Healthcare in the UK

- Overview & Structure of the NHS in England, Scotland, Wales and Northern Ireland.
- Analysis of the NHS 5 Year Forward View/NHS Long Term Plan.
- Analysis of the size and state of the NHS estate in England and Scotland.
- The Primary Care Estate - a shift towards primary care.
- Analysis of the size and state of GP Premises and Funding available for premises development.
- Review of NHS Surplus Land.
- Healthcare Funding in the UK - NHS Funding Resource & Capital Allocations for England, Scotland, Wales & Northern Ireland.

Private Acute Healthcare Sector in the UK

- Overview, size and value of the Private Acute Healthcare Sector in the UK.
- Private Healthcare Providers - Partnership with the NHS.
- Analysis of leading private healthcare providers; private healthcare companies and GP surgery providers.
- Private Dental Care.

Procurement of Healthcare Construction Work

- Use of PFI/PF2 in the Healthcare Sector.
- Axing of PFI/PF2 - Implications for the NHS and Healthcare Procurement.

- Procurement Routes for GPs and CCGs.
- Analysis of main healthcare construction procurement programmes in the UK - NHS LIFT/ExpressLIFT; HUB Initiative Scotland; Procure 21+/Procure22; NHS Building for Wales Frameworks; Frameworks Scotland 2/3.
- Future of Public Procurement and Brexit.
- Other Finance and Procurement Options for Healthcare Clients - SEPs and Joint Ventures.

Construction Supply in the Healthcare Sector

- Construction Practices - Use of Modular Construction in the Healthcare Sector.
- Leading Clients in the Healthcare Sector.
- Key Contractors in the Healthcare Sector - Contractors' Market Share in the Healthcare Sector - By Contract Awards .
- Contractor Profiles - John Graham Construction; Kier; John Sisk; Laing O'Rourke; Galliford Try; BAM; Interserve; Robertson Construction ; Willmott Dixon; Integrated Health Projects (IHP); McLaughlin & Harvey; Balfour Beatty; Others.
- Healthcare Developers and Investors.

Report Summary

The NHS continues to see a shift away from hospital-based provision towards a community-based model of care, transforming primary care services in line with the NHS Five Year Forward View and the recently published NHS Long Term Plan. This places greater emphasis on Integrated Care and population health, which has been a defining feature of recent NHS policy.

At the same time, against a backdrop of constrained capital investment in the NHS and rising backlog maintenance costs, the nature of healthcare procurement and construction is also changing, following the chancellor's Budget 2018 announcement that the Government will no longer use PFI and PF2 contracts to fund infrastructure projects.

The cancellation of PFI and PF2 as a means of delivering new healthcare projects going forward is likely to have significant consequences for health sector construction output, with the emphasis now firmly on publicly funded healthcare projects.

There is now an urgent need for investment across the NHS estate in England to ensure healthcare infrastructure is fit to deliver new models of integrated care and the Government has made it clear that it will need to find funding from a range of sources, including from the private sector to help fund future infrastructure projects and to address the £6bn maintenance backlog.

The value of healthcare contracts awarded remained fairly consistent in 2018, up from 2017, though unchanged from 2016 values. Public hospitals again accounted for the largest share of contract awards in 2018.

Going forward, the planning pipeline remains positive, but operating at a significantly lower level than some other construction sectors and is now mainly concentrated on smaller, lower value extension and refurbishment projects.

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