Healthcare market trends update
September 2019
Introduction

The National Health Service is an immense market, spending over £1 billion every three days. Therefore, there is a huge opportunity for NHS procurement professionals and supplying organisations to work together to support the delivery of public services, boost efficiencies and drive better value for money.

At BiP Solutions, we have spent 35 years bringing buyers and suppliers together. Over 250,000 private sector businesses in the UK alone, including 20% of companies listed on the FTSE 100 Index, rely on BiP’s expertise to help them grow. We offer a number of innovative solutions to support you through all stages of your procurement journey. This includes our market intelligence solution, Tracker, which offers the largest public sector tenders and awards database in Europe, including countless healthcare opportunities. Tracker delivers private and public sector contract opportunities and awards, market intelligence, spend analysis and market leads at the click of a button.

We also bring buyers and suppliers together at three leading healthcare supply chain events – P4H England, P4H Ireland and P4H Scotland, and provide the UK’s fastest-growing healthcare community at Health Online.

In our latest Healthcare report, part of our ongoing BiP Inform Series, we take a deep dive into who’s spending and where. We look at which suppliers are winning contracts and the buying organisations that are providing current opportunities within this huge marketplace.

Key highlights*:

• In July, the total spend was just over £1.6bn (£1,632,692,811)
• 663 notices were published with a further 535 contracts awarded
• Midlands and Lancashire Commissioning Support Unit awarded the most contracts (210), representing just shy of 40% of contracts awarded during this period
• The top buyer during July was Salisbury NHS Foundation Trust, with a combined awards value of £500,000,000
• The top supplier during July was Action for Children Service Ltd who won three awards, the total value of which was £10,700,000

We hope you will find this report of interest. If you would like to find out more about how BiP Solutions can support you on your procurement journey, please do get in touch via the contact details on the last page of this report.

* All data taken from BiP’s Tracker Market Intelligence tool and covers the period 1 to 31 July 2019. All details correct at time of publication.
Healthcare Market Overview – who is spending and where?

During the month of July, 663 notices were published and 535 contracts awarded. In Figure 1, we list the top ten buyers by combined awards value. The top ten combined awards values ranged from approximately £29m to £500m. The highest value related to a single contract awarded by Salisbury Managed Procurement Services, part of Salisbury NHS Foundation Trust, in partnership with Health Education England, for a dynamic purchasing system for the provision of post-registration clinical apprenticeships, including advanced clinical practitioner programmes, and plans to also include consultant apprenticeships when released.

Of the 535 contracts awarded, almost 40% were awarded by Midlands and Lancashire Commissioning Support Unit - 210 awards in total. This related to the provision of health services in care homes with the bulk of contracts specifically related to end-of-life care.

### Top 10 Buyers by Combined Awards Value

<table>
<thead>
<tr>
<th>Rank</th>
<th>Buyer</th>
<th>Combined Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Salisbury NHS Foundation Trust</td>
<td>£500 MILLION</td>
</tr>
<tr>
<td>2</td>
<td>N E L Commissioning Support Unit</td>
<td>£335,000,000</td>
</tr>
<tr>
<td>3</td>
<td>NHS Bristol, North Somerset and South Gloucestershire Clinical Commissioning Group</td>
<td>£77,574,133</td>
</tr>
<tr>
<td>4</td>
<td>Health Service Executive (HSE)</td>
<td>£76,640,065</td>
</tr>
<tr>
<td>5</td>
<td>NHS Commissioning Board - NHS England and NHS Improvement (Public Health Commissioning)</td>
<td>£76,303,834</td>
</tr>
<tr>
<td>6</td>
<td>West Essex Clinical Commissioning Group</td>
<td>£75,000,000</td>
</tr>
<tr>
<td>7</td>
<td>Partners Procurement Service</td>
<td>£67,114,454</td>
</tr>
<tr>
<td>8</td>
<td>HealthTrust Europe Limited (HTE) acting as agent for the University Hospitals of Coventry and Warwickshire NHS Trust</td>
<td>£54,500,000</td>
</tr>
<tr>
<td>9</td>
<td>NHS Arden and Greater East Midlands Commissioning Support Unit</td>
<td>£30,133,534</td>
</tr>
<tr>
<td>10</td>
<td>NHS Digital</td>
<td>£29,598,500</td>
</tr>
</tbody>
</table>

### Top 10 Buyers by Volume of Awards

<table>
<thead>
<tr>
<th>Rank</th>
<th>Buyer</th>
<th>Awards</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Midlands and Lancashire Commissioning Support Unit</td>
<td>210</td>
</tr>
<tr>
<td>2</td>
<td>Hull University Teaching Hospitals NHS Trust</td>
<td>45</td>
</tr>
<tr>
<td>3</td>
<td>NHS Arden and Greater East Midlands Commissioning Support Unit</td>
<td>25</td>
</tr>
<tr>
<td>5</td>
<td>NHS Wales Shared Services Partnership</td>
<td>16</td>
</tr>
<tr>
<td>6</td>
<td>Blood Services South West</td>
<td>15</td>
</tr>
<tr>
<td>7</td>
<td>Surrey and Borders Partnership NHS Foundation Trust</td>
<td>9</td>
</tr>
<tr>
<td>8</td>
<td>NHS Digital</td>
<td>8</td>
</tr>
<tr>
<td>9</td>
<td>The Queen Elizabeth Hospital King’s Lynn NHS Foundation Trust</td>
<td>8</td>
</tr>
<tr>
<td>10</td>
<td>United Lincolnshire Hospitals NHS Trust</td>
<td>8</td>
</tr>
</tbody>
</table>
**Top 10 Suppliers by Combined Awards Value**

1. **Physiotherapy Solutions Ltd t/a Vita Health**
   - £77,574,133

3. **Baxter Healthcare Ltd**
   - £819,082

3. **Unisurge International Ltd**
   - £517,469

3. **British Telecommunications**
   - £162,072

2. **Health Intelligence Ltd**
   - £24,930,166

2. **Ross Care Holdings Ltd**
   - £16,246,370

2. **Greater Manchester Dental Alliance Ltd**
   - £8,400,000

2. **South Manchester Dental Emergency Cooperative**
   - £8,400,000

2. **Cygnet Health Care**
   - £7,313,000

2. **Trustmarque Solutions Ltd**
   - £3,958,300

2. **Alzheimer’s Society**
   - £1,266,688

2. **Specialist Computer Centres**
   - £1,177,067

2. **Off the Record**
   - £1,126,462

**Healthcare Market Overview**

**Supplier opportunities**

Figure 3 details the top 10 Suppliers by Combined Awards Value. The highest award value was to Physiotherapy Solutions Ltd t/a Vita Health, related to a single award for Improving Access to Psychological Therapies (IAPT) Service across Bristol, North Somerset and South Gloucestershire, appointed by NHS Bristol, North Somerset and South Gloucestershire Clinical Commissioning Group – the third highest spending buyer in this period.

The supplier which won the most awards with the highest combined value in July was Action for Children Services Ltd, who were awarded three contracts to the value of £10,700,000. These awards specifically related to contracts for NHS Wales Shared Partnership, NHS Arden and Greater East Midlands Commissioning Support Unit, and NHS North Derbyshire Clinical Commissioning Group, for the delivery of services related to family intervention or targeted early intervention services for children and young people’s emotional and mental health. Figure 4 provides details of all suppliers who won three awards or two awards with a combined value of over £1m.
The West Midlands tops the list for the highest number of contracts awarded, with 225 awarded in July. However, the region with the highest combined awards value was the South West of England, with 33 contracts equalling a value of £608,208,256. Interestingly, given the current external landscape and Brexit, Ireland is the fourth highest region in terms of the combined value of contracts awarded - £78,988,738 for 12 opportunities. We will monitor this in the coming months.
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UK healthcare media content, contracts & project leads with BiP Solutions

Health Online - The Dynamic Healthcare Community
We are the UK’s premier online healthcare community, comprising healthcare professionals and key healthcare suppliers. Supplying new and relevant content and news stories in the healthcare space, Health Online provides a fully customisable experience - meaning you only see the stories and topics most relevant to you.

P4H - the Procurement Events for Health
P4H brings together healthcare procurement professionals and industry-leading suppliers. Officially supported by organisations such as the Department of Health and Social Care (DHSC) and NHS National Services Scotland (NSS), these one-day events provide exhibitors and attendees from the public and private sector with an opportunity to engage across a range of interactive and educational keynote talks, training sessions, supplier engagement opportunities and more. Each event is focused around supporting the latest healthcare procurement initiatives and objectives relevant to that country.

The programme of P4H events covers Scotland, England and Ireland.

Tracker Intelligence – Find, bid for and win more public & private sector contracts
Tracker offers the largest public sector tenders and awards database in Europe. It delivers private and public sector contract opportunities and awards, market intelligence, spend analysis and market leads at the click of a button. Stay one step ahead of your competitors and get personalised support to grow your business with Tracker.

For more information Freephone 0845 557 1324

BiP Solutions - Bringing buyers and suppliers together for over 35 years