Reflections from the IHPN Annual Summit 2025

Challenges, opportunities and what comes next

Bevan Brittan

Two weeks on...

Two weeks on from the IHPN Annual Summit, the conversations still resonate. In many ways, the time lag has been helpful to digest the discussions and consider what comes next. With the dust now settled, the themes that continue to surface in meetings, internal discussions, and follow-up calls with operators and investors are the ones that really matter.

In this report, we will reflect on the key themes of the Summit: the challenges that feel unavoidable, the opportunities that feel real, and the practical shifts providers and investors should be preparing for now.

Independent Healthcare Providers Network

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Navigating policy headwinds

If the Summit made one thing clear, it is that policy risk and policy opportunity are running in parallel. There is real anticipation ahead of the 26 November Budget, not in a speculative sense, but because everyone understands its potential impact on workforce costs, capital incentives and the pace of public/private collaboration. The repeated references to the Employment Rights Bill underline how quickly workforce economics could move for providers, especially those with large flexible or multi-site workforces.

The policy cycle is volatile. Providers and investors are being asked to commit capital and make workforce decisions before the direction of travel is fully defined. But, there are opportunities here because periods of policy ambiguity often create first-mover advantages. Providers with strong HR governance and the ability to model multiple scenarios will be the ones who can transact, partner or expand while others pause, reflect and catch up.

This is a moment to double down on clarity of legal risk, on funding assumptions, and on workforce exposure. Those who invest in that clarity now will be able to move faster when the ambiguity lifts.

Regulation: progress, pressure and the need for patience

CQC reform was mentioned often at the Summit, sometimes optimistically, sometimes with frustration. The 'green shoots' in inspection output and reporting are encouraging, but the consensus was that the registration pipeline needs more pace and more certainty, and that inconsistencies in timelines continue to create operational drag. This creates clear challenges for providers who are running services that depend on approvals and registrations they cannot fully control. That in turn creates tension in organisations and investor committees, especially when growth plans hinge on regulatory throughput.

The ongoing shift to a more digitally enabled, evidence-based regulatory model means that providers who invest in strong data, governance and documentation can differentiate themselves. Compliance is not just risk management, but increasingly a commercial advantage. Nevertheless, regulation rarely moves as fast as the sector wants it to, so providers will need to treat regulatory affairs as a strategic function and not solely as an administrative burden.

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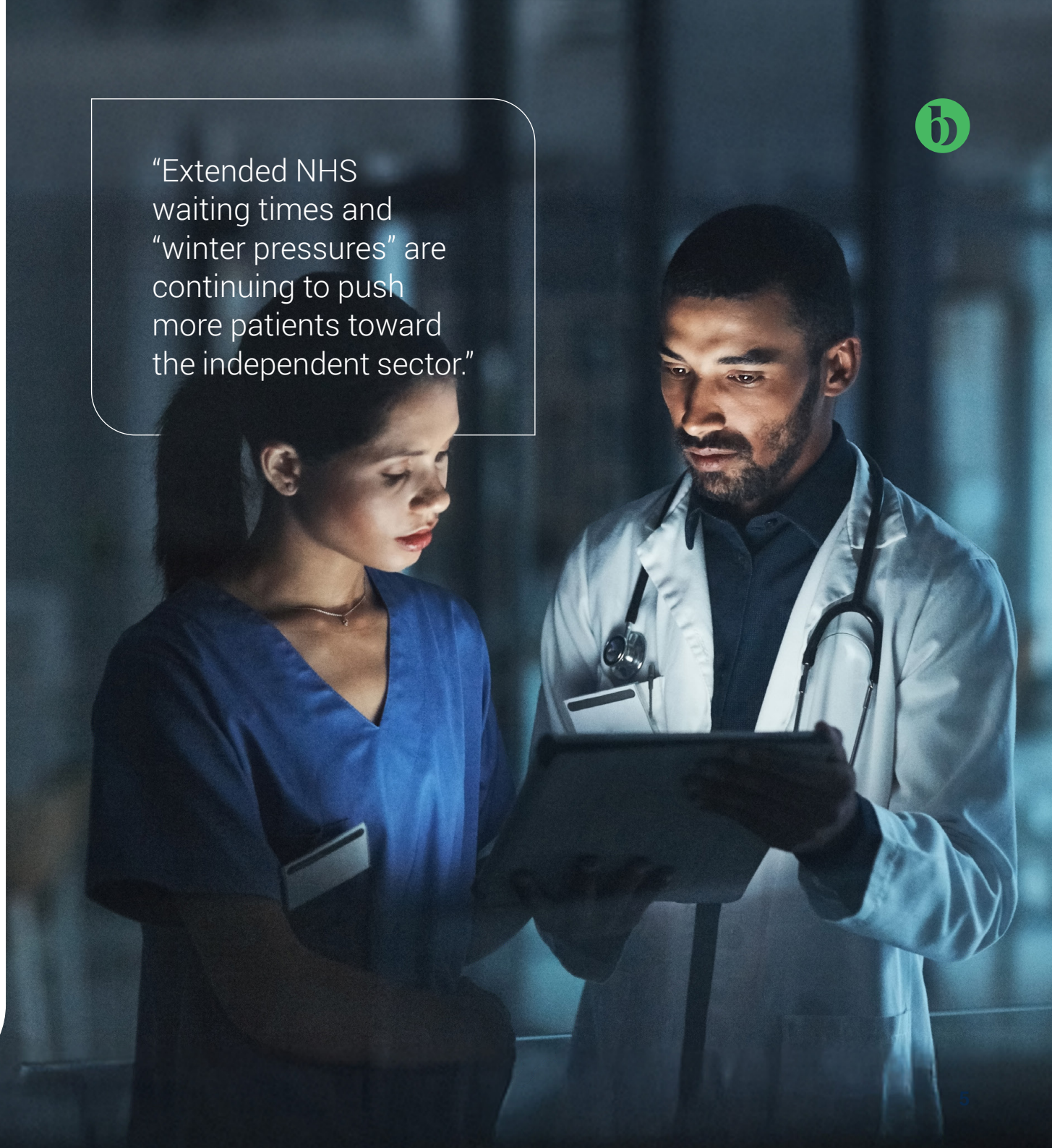
Demand dynamics: a changing mix with real commercial consequences

A continually occurring point was the divergence in demand patterns. Insured / PMI activity continues to grow across several specialties. Self-pay, meanwhile, appears to be flattening, but with pockets of resilience. At the same time, extended NHS waiting times and "winter pressures" are continuing to push more patients toward the independent sector for timely access. This raises challenges for providers trying to plan capacity, pricing and workforce deployment against a moving target. For investors, the question is whether these patterns represent a sustained structural shift or a temporary realignment.

Equally, where demand is shifting because patients value access, transparency and certainty, opportunities arise because there is room for providers to redesign pathways, improve the patient experience and build trust. Diagnostics, primary care and lower-acuity elective and mental health services all feel like areas where the sector can expand meaningfully.

This is an important moment for the independent sector because it feels like the closest the sector has come to becoming a mainstream part of how consumers understand and access care, rather than an alternative to the NHS. That normalisation is a strategic asset, which the sector needs to leverage for sustained gains.



Collaboration: widely supported, but not straightforward

Almost everyone at the Summit spoke positively about the need for deeper and more meaningful NHS / independent collaboration, but they were equally honest about the practical barriers: funding certainty, contracting frameworks, long implementation horizons and the resource intensity required to make partnerships happen let alone work in practice. Ultimately, inter-market partnerships are costly in time, people, and preparation, and whilst many organisations want to collaborate, they cannot commit without clear commercial fundamentals, which again creates opportunities for well-structured collaborations that can offer scale, sustainability and long-term value. The most successful providers will be those who can balance ambition with realism by testing feasibility early and structuring phased models where success will depend on practical, evidence-based business cases that work for both sides.

Leadership and workforce: the sector's most significant swing factor

During the Summit, we took part in an engaging discussion about the changing expectations of the workforce and the ways in which employers will need to adapt to those expectations to attract and retain talent. The Employment Rights Bill will reshape employment practices, costs and HR risk. Across the Summit, workforce wellbeing, retention, and morale came up repeatedly, not as slogans but as bottom-line realities. Workforce shortages, rising expectations, new employment rights and a competitive labour market are creating complex pressures. There is a growing demand for flexibility, a just and learning culture, and recognition. Leadership teams must deliver stability while absorbing more regulatory and employment risk so productivity improvements, flexible staffing models and investment in staff experience can help to deliver value in uncertain times.

Next steps

The three next steps now feel unavoidable:

Build resilience: Policy, workforce and regulatory uncertainty are real, but none of them are insurmountable, which is why scenario planning is a strategic advantage.

Invest in operational clarity: CQC readiness, employment law compliance, digital evidence trails and transparent governance will define who can scale and who gets stuck.

Be ambitious, but selective: Primary care, diagnostics, lower-acuity elective, mental health, international expansion and productivity-linked investment all remain credible opportunities. Equally, not every collaboration will be worth the effort. Choose the partnerships where commercial fundamentals work for you.

About us

Bevan Brittan is the UK market-leader in legal, governance and regulatory advice to both independent and public health and care organisations. Our multi-award-winning team of over 300 specialist lawyers, including 30+ partners, delivers end-to-end corporate, commercial, employment, real estate, planning, construction, finance and regulatory support across all health, social care, med tech and life science sectors.

Working with independent operators, NHS organisations, funders, developers, investors and insurers, we combine deep sector knowledge with commercial and public service insight to guide projects from planning and development through to operational delivery and multisite growth.

As the health and care landscape evolves, we help clients navigate complex challenges, from HR disputes and tendering processes to regulatory enforcement, joint ventures and system integration, always recognising that patient care remains central.

Our focus is clear: to provide practical, robust and commercially grounded advice that protects reputation and value, meets regulatory requirements and enables confident decision-making across an increasingly complex, fast-changing sector.

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