NHS
New Hospital Programme

MMC Ireland lunch and learn session with New Hospital Programme

17th June 2026

Department of Health & Social Care

NHS England

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Welcome, Agenda & Introductions

All

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Agenda

NHS New Hospital Programme

No.	Time	Item	Lead
1	5 mins	**Welcome** Purpose of the session	**Dan Lem**
2	10 mins	**New Hospital Programme (NHP) Overview** Programme background, key milestones and upcoming delivery pipeline **Hospital 2.0 Vision** Standardised, sustainable and industrialised approach to delivering future NHS hospitals	**Dan Lem**
3	10 mins	**Overview of Modelling Work and Key Insights** – Facades example	**Dan T**
4	5 mins	**Market Management Team/Industry Engagement** Overview of team activities and key market engagement touchpoints (internal/external)	**Dan Lem & Dan T**
5	5 mins	**Sustainability – Social Value - Skills** Net Zero buildings – local value – workforce upskilling	**Dan T**
6	5 mins	**Key Industry Challenges – Supplier opportunities**	**Dan T**
7	5 mins	**How you can engage with us**	**Dan Lem**
8	10 mins	**Any Questions**	**All**

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New Hospital Programme Overview

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Successes and Milestones

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2020

New Hospital Programme Publicly announced

2021

Hospital Northern Centre for Cancer Care Open

Procurement of Strategic Delivery Partner

Procurement of Interim Delivery Partner

2022

Programme Business Case 1 Submitted

Royal Liverpool Hospital open

Programme Business Case 2 Submitted

2023

Brighton 3Ts Phase 1 Open

Sycamore Unit at Northgate Hospital open

Consultation with SME's
Clinical, Patient and Market stakeholders are consulted to inform and innovate emerging design

Ongoing Consultation with SME's
Clinical, Patient and Market Stakeholder engagement continues

Cohort 2 delivery commences
Earlier schemes commence their hospital projects

Programme Business Case 3 Submitted

Stand up of Transition Delivery Partner
To support the programme in moving to mobilisation of Programme Delivery Partner

Dyson Cancer Centre open

Market Capacity
Leading the conversation with IPA on market capacity in UK infrastructure

2024

Greater Manchester Trauma Hospital open

Hospital 2.0 Release 3
Strategies, design and technical documents released to Trusts to accelerate design and business case processes

NHP Agreement
Implementation of collaborative environment for later stages of the programme

On-site and Delivering Enabling works and construction continued with schemes, major completions in 2024 included Midlands Metropolitan University Hospital.

Completion of concrete structure of the new centre of Oriel Eye Hospital

'Steel signing' ceremony for the two Wave 0 hospitals in Dorset

2025

NHP Review Announcement
SoS for Health and Social Care announced NHP plan for implementation

Hospital 2.0 Alliance
Procurement launched

Programme Delivery Partner appointed - The Health Delivery Partnership

2026

Hospital 2.0 Alliance
Procurement Awarded – 10 MWC

Hospital 2.0 Alliance
Mobilisation March 2026 onwards

Alliance Main Works Contractors (MWC)

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	Construction Partners (names listed in alphabetical order not ranking)	Single entity or Consortium
1	Bovis Construction (Europe) Limited	Single entity
2	Dragados Sociedad Anonima	Single entity
3	Integrated Health Projects (IHP)	Consortium of 2 entities: · Sir Robert McAlpine Limited; and · VINCI Building Limited
4	John Graham Construction Limited	Single entity
5	Kier Construction Limited	Single entity
6	Laing O'Rourke Delivery Limited	Single entity
7	Morgan Sindall Construction and Infrastructure Ltd	Single entity
8	Sacyr UK Limited	Single entity
9	Skanska Construction UK Limited	Single entity
10	Willmott Dixon Construction Limited	Single entity

Updated NHP Schedule

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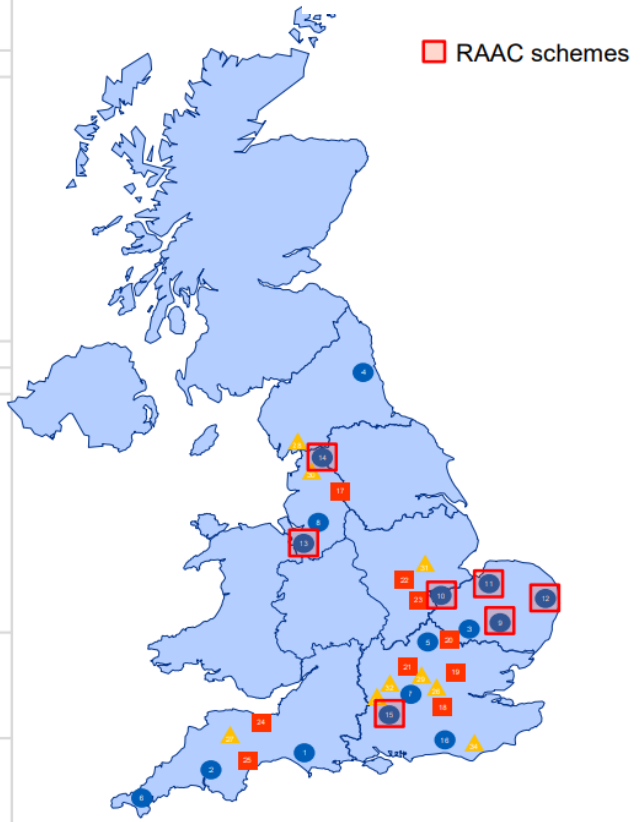
Wave	#	Scheme	Region	Exp. construction start date
Wave 1 (2025-30)	1	Poole Hospital, Dorset	South West	2025 to 2026
	2	Derriford Emergency Care Hospital, Plymouth	South West	
	3	Cambridge Cancer Research Hospital	East of England	
	4	Shotley Bridge Community Hospital, Durham	North East	2026 to 2027
	5	Milton Keynes Hospital	East of England	2027 to 2028
	6	Women and Children's Hospital, Cornwall	South West	
	7	Hillingdon Hospital, north-west London	London	
	8	North Manchester General Hospital	North West	
	9	West Suffolk Hospital, Bury St Edmunds (RAAC)	East of England	
	10	Hinchingbrooke Hospital (RAAC)	East of England	
	11	James Paget Hospital, Great Yarmouth (RAAC)	East of England	
	12	Queen Elizabeth Hospital, King's Lynn (RAAC)	East of England	
	13	Leighton Hospital (RAAC)	North West	
	14	Airedale General Hospital (RAAC)	North East & Yorkshire	
	15	Frimley Park Hospital (RAAC)	South East	2028 to 2029
	16	Brighton 3Ts Hospital	South East	2026 to 2027
Wave 2 (2030-35)	17	Leeds General Infirmary	North East & Yorkshire	2032 to 2034
	18	Specialist Emergency Care Hospital, Sutton	London	
	19	Whipps Cross University Hospital, north-east London	London	
	20	Princess Alexandra Hospital, Harlow	East of England	
	21	Watford General Hospital	East of England	
	22	Leicester Royal Infirmary, Leicester General Hospital and Glenfield Hospital	Midlands	
	23	Kettering General Hospital	Midlands	
	24	Musgrove Park Hospital, Taunton	South West	
	25	Torbay Hospital	South West	
Wave 3 (2035-39)	26	Charing Cross Hospital and Hammersmith Hospital, London	London	2035 to 2038
	27	North Devon District Hospital, Barnstaple	South West	
	28	Royal Lancaster Infirmary	North West	
	29	St Mary's Hospital, north-west London	London	
	30	Royal Preston Hospital	North West	2037 to 2039
	31	Queen's Medical Centre and Nottingham City Hospital	Midlands	
	32	Royal Berkshire Hospital, Reading	South East	
	33	Hampshire Hospitals	South East	
	34	Eastbourne District General, Conquest Hospital and Bexhill Community Hospital	South East	



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Hospital 2.0 Vision

Dan Lem

The Hospital 2.0

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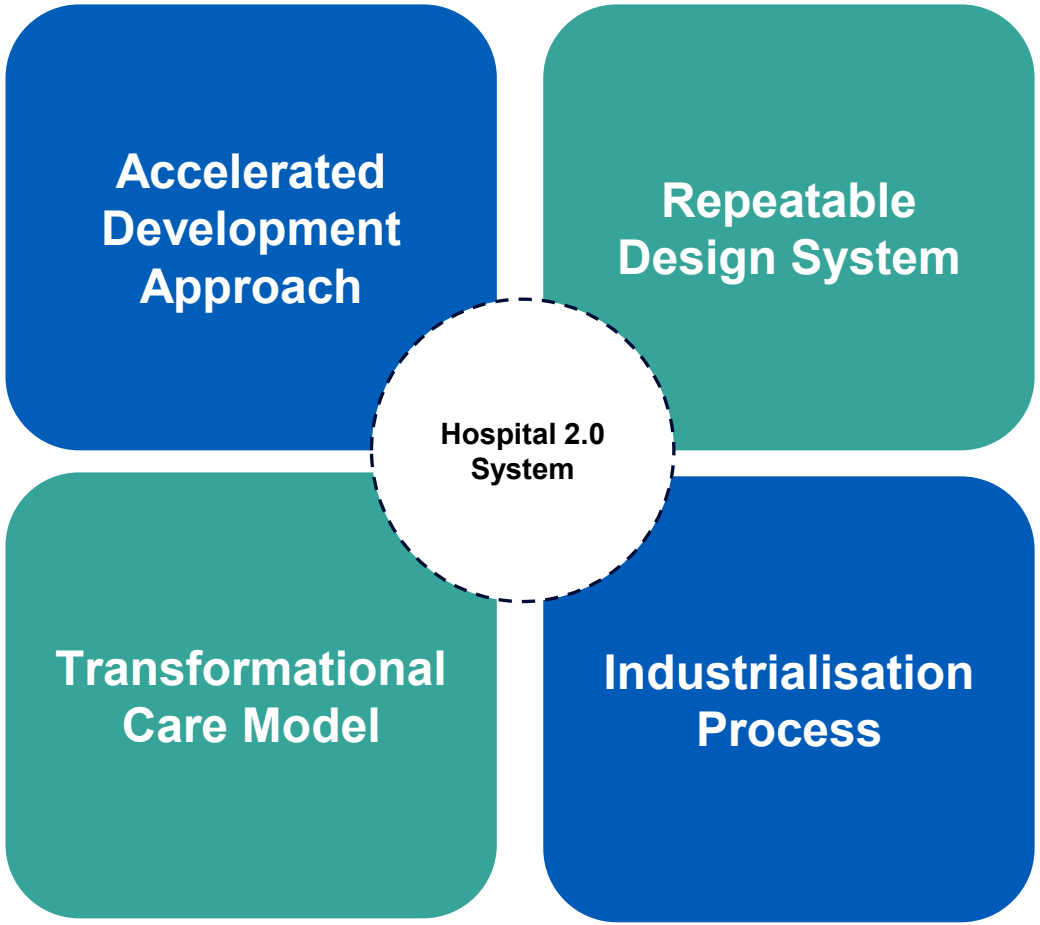
The Hospital 2.0 System drives a step change in the delivery of healthcare infrastructure.

NHP needs to deliver transformational hospitals cheaper and faster. Historically every scheme is a standalone project with a new solution to the same fundamental challenges developed each time and no learning between projects.



Hospital 2.0

Our future hospital system advancing patient care in high quality healthcare environments

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01

A standardised blueprint

A blueprint for designing, costing, and delivering hospitals for the New Hospital Programme.

02

The "operating system"

Driving this blueprint is a system of key principles, standards and guidelines. Data and information drives decision making and improvement through connected systems.

03

Expertise and consultation

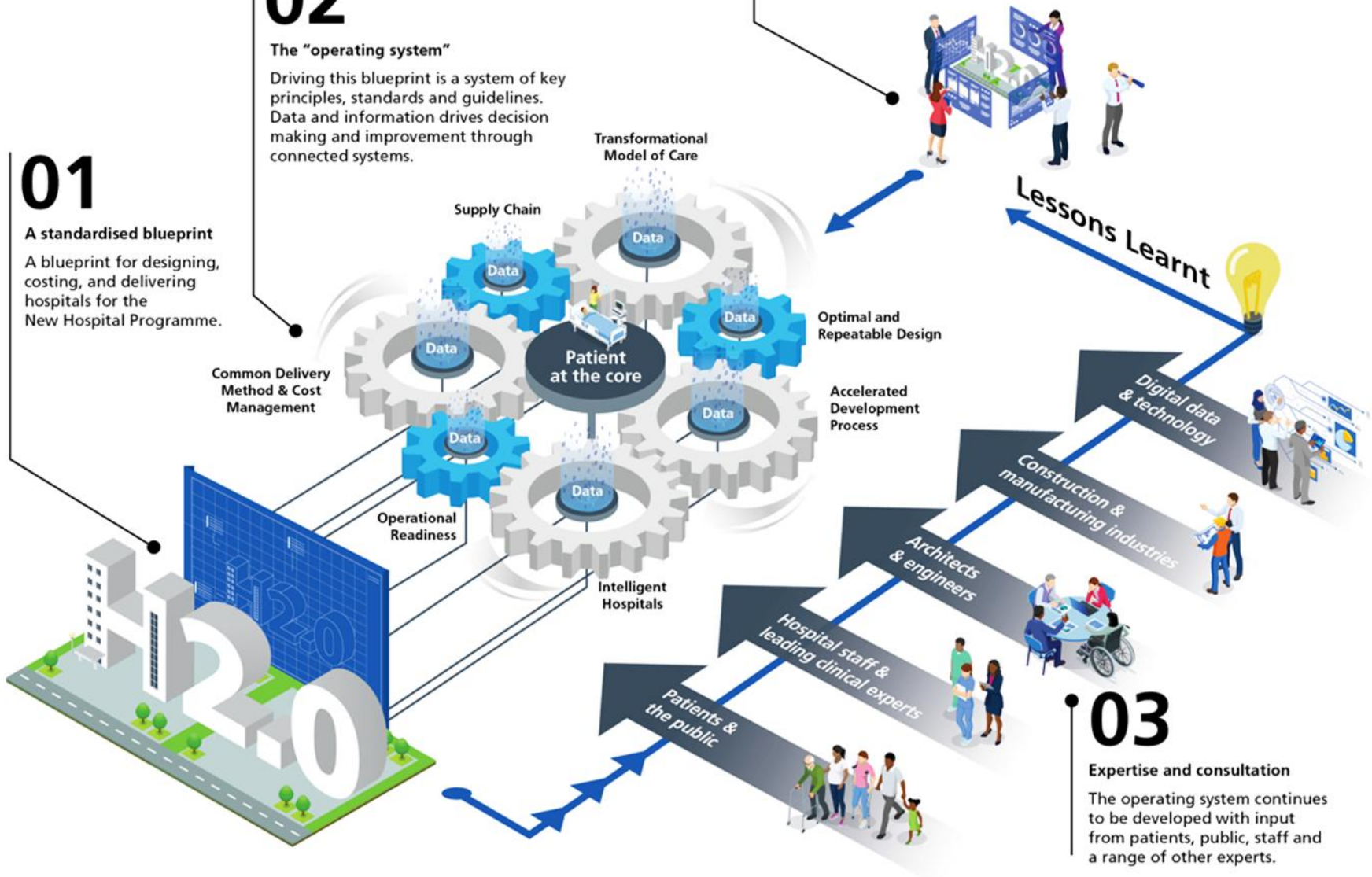
The operating system continues to be developed with input from patients, public, staff and a range of other experts.

04

Innovative and shared learnings

Data will be collected and used to drive continuous improvement and generate a learning eco-system.

Hospital 2.0 learns and evolves and improves every time it is deployed and implemented.



The Four Key Principles

Transformational patient care

Driving transformation to provide an excellent, safe and digitally enabled experience for patients, visitors and staff.

Hospitals for now and for the future

Hospitals that are adaptable and resilient to change, that transform national standards and leave a sustainable legacy.

Optimised healthcare structure

The right estate, the right layout, enabling people to be in the right place, supported by intelligent digital systems.

Built efficiently; operated and maintained to last

Using innovation and technology to leverage scale and drive efficiency and value for money and ensure maximum durability for the future.

Designed by experts, informed by the NHS

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Co-production

Hospital 2.0 has been developed by involving people with lived and learnt experience throughout stages of the design process where possible, choosing the most appropriate methods of involvement for that stage. This includes clinical, workforce, patients and the public working alongside SMEs

Over **1300** clinicians

10+ Multidisciplinary teams

Over **400** patients and lived experience partners

57 Architects and designers

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Overview of Modelling Work and Key Insights

Dan T

Facades modelling: market-informed integrated planning

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1 Data refresh

- NHP demand portal product type demand data
- NHP demand portal RIBA data
- Demand assumptions
- RIBA design choices
- Supply capacity, appetite & capability by product type / year
- Supply lead times by product type
- Resource skills supply by area

2 Market engagement

Core supplier group workshops

Validated supply capacity, appetite and lead-time assumptions
Supported development of the facades technical specification
Built confidence in manufacturability and install capability

Industry bodies & wider market

Captured wider challenges and constraints across facades
Reached suppliers who had not yet had an opportunity to engage
Surfaced skills, standards and regional availability issues

3 Modelling review

Run agreed scenarios

Change demand profile by type or time
Change supply profile to reflect appetite, capability, lead time or new suppliers
Model market capacity gaps and constraint impacts
Test options to bridge gaps and mitigate risks

Outputs: prioritised gaps, risk view and intervention options

4 Recommended decisions

Recommend time-bound decisions to resolve issues

Work with Alliance and suppliers to build appetite and capability
Replace key assumptions with evidence from workshops and industry engagement
Invest in accelerated skills development to cover gaps
Adjust demand profile to smooth peaks and protect delivery timelines

Decision log links each intervention to owner, due date and trigger metric

Facades Scenarios

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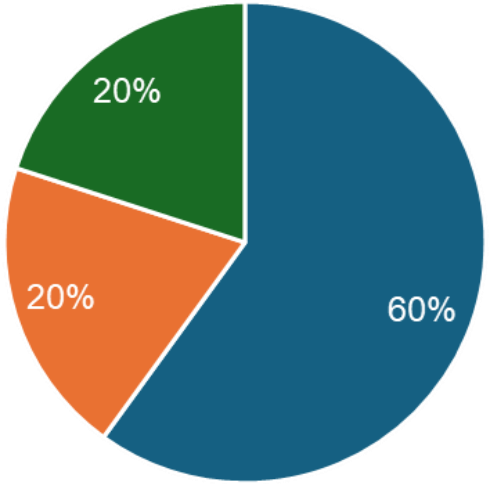
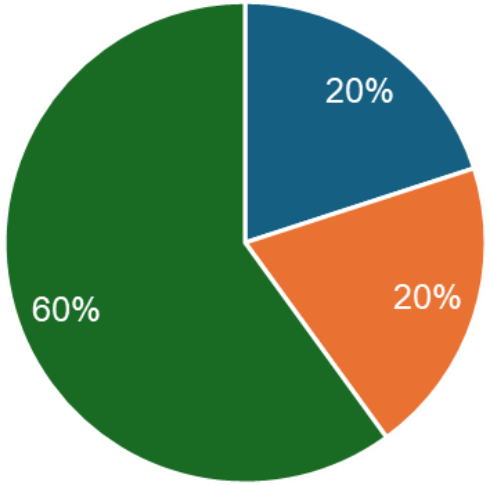
Scenario 1: SFS Heavy



High SFS demand scenario compared to UK capacity

Scenario 2: Unitised Heavy[1]

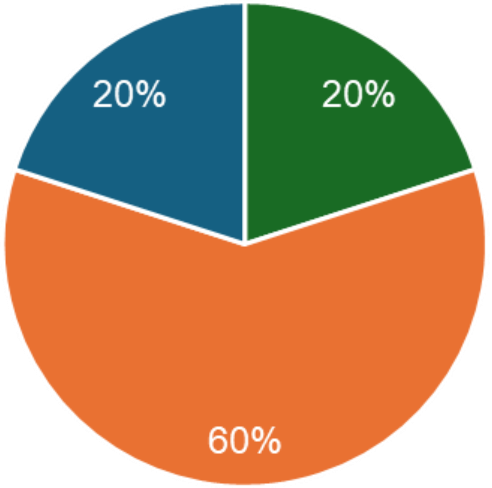


High Unitised demand compared to UK capacity

Portions selected based on Society forecasts

Scenario focused on due to low UK manufacturing and install capacity

Scenario 3: Precast Heavy



Precast Heavy scenario is the least likely (according to Society of Facade Engineers) and UK Demand is well within UK capacity

Unitised SFS Precast

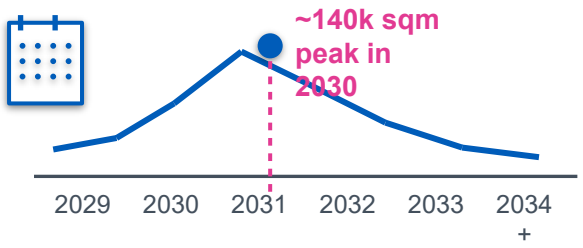
Identified Actions:

- Planning team to work with the Alliance core group to understand program view of supplier choices, as soon as early indications are made

1. Demand profile

- Demand modelled from scheme pipeline and facade assumptions.
- Unitised demand peaks at around 140k sqm in 2030.
- Demand can be reshaped over time through scenario testing and planning decisions.

Demand outlook (sqm p.a.)



Scenario modelling helps test options to smooth peaks, align interventions and reduce risks.

2. Market capacity

High level comparison of supply and install capacity

	Unitised	SFS
Supply	Overall EU+UK install capacity appears materially higher than manufacturing capacity.	Market capacity is more concentrated.
Install	UK install capacity is more constrained than total EU+UK capacity.	Install capacity exists but is concentrated.
Supplier landscape	Market dominated by 6 large non-UK firms.	Dominated by 1 large firm able to meet demand, with smaller providing install..
Constraints	**If constrained to suppliers with NHS experience, demand can exceed available install capacity.**	**Supplier appetite for healthcare schemes and proprietary systems is not universal.**

3. What the modelling shows

- Unitised market is dominated by 6 large non-UK firms.
- Two of the six can both supply and install; the remainder are primarily supply-focused.
- UK-based independent unitised installers are relatively small, with 2–4 mid-sized EU firms potentially supporting smaller schemes or parts of schemes.
- SFS market is dominated by 1 large firm, with smaller companies focused on installation.
- Key constraints are likely to relate to install capacity, supplier appetite, healthcare experience and proprietary system requirements.

4. Market engagement and key actions

1. **Engage with the core supplier group through workshops to test appetite, understand capacity and capability.**
2. **Continue market engagement with key suppliers to increase appetite and capability for healthcare work.**
3. **Engage industry bodies to capture wider market challenges and reach suppliers who have not yet had an opportunity to engage with us.**
4. **Use the modelling to inform decisions on demand smoothing, supplier engagement and targeted skills/capability development.**

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Market Management Team/Industry Engagement

Dan Lem

What do we do?

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01 Supply Intelligence & Management

- Engage with suppliers to shape a resilient and informed NHP supply chain
- Programme supply chain mapping
- Risk & opportunity management
- Supply Chain collaboration: nurturing, establishing early supplier relationships
- Managing strategic suppliers

02 Strategic Market Shaping

- Shape the supplier market to build robust capacity, capability, and competition
- Early industry engagement to align demand/supply, identify efficiencies and optimise opportunities – e.g. innovation, standardisation, productivity and continuous improvement
- Data and insights to inform interventions, mitigate risks and bottlenecks to improve, resolve and deliver
- Supplier development to make the NHS/NHP a client of choice
- Integrate social value, sustainability and NHS standards

03 Market Engagement

- Increase supply chain accessibility & visibility of future NHP pipeline/ opportunities
- Understand market capacity
- Inform procurement, commercial and delivery strategies to optimise benefits
- Build sector, regional and national market appetite to support NHP & NHP schemes
- Prepare market to deliver H2.0 standard

04 Strategy & Planning

- Create scheme and wave demand profiles to forecast and model Programme pipelines
- Build confidence in delivery of the Programme by developing interventions, overarching category strategies and inform industrial opportunities
- Establish sustainable industry partnerships by exploring opportunities

Legacy aim: Leaving a nationwide **supply chain legacy** to ensure future NHS investment can be delivered through

Engagements

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01

Industry Engagement
Developed relationships with organisations such as FIS, SoFE, BESA, TeckUK, BCC. NHP has a strong presence and regular opportunities to attend and present at events

02

Strategic Supplier Relationship Management to deliver value beyond contracts

- *121 / group workshops*
- *Support innovation*
- *Understand industry challenges*

03

Development of technical specification through industrialisation process and collaboration with suppliers and industry bodies for critical products while testing and de-risking the market

04

Supply Chain Hub enabling 'best for programme decisions' on supply chain risks and opportunities based on market research and modelling work

05

Interconnected Approach

Engagement with Trusts, clinical teams, public and industry experts to develop a cutting-edge new hospital solutions

06

Strategic Supplier Forums - Active working groups established to drive design, innovation, efficiencies and risk reduction for our core 7 industrialised categories

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Sustainability – Social Value - Skills

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Social Value Skills Opportunities

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Opportunities

Joint Workforce Planning

Creates an incentive for collaboration to co-design shared workforce pipelines, harmonise standards and strengthen the UK talent pool.

Stimulate the Market Confidence & Investment

Provide clearer visibility of pipeline, offer early engagement, support capability building with FE/HE providers and improve market confidence

Regional Hubs and Shared Training Products

Overlapping projects create regional coordination, shared training centres, pooled resources, working a collaborative, coordinated approach

Grow, Upskill and Diversify the Workforce

Attract new entrants, career changers, returners, other sectors, championing modern recruitment approaches and inclusive pathways

Build Local Capability and Community

Develop locally anchored skills solutions, reducing the reliance on travel and bringing employment closer to communities

Programme Objectives

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Delivery of modern, sustainable healthcare facilities while also creating broader social, economic and environmental benefits for communities.

Social Value: To maximise the **Social Value** (positive economic, social and environmental impacts) created by NHP schemes at all phases, creating virtuous circles of economic activity at a local and regional level.

Net Zero and Biodiversity: Contribute to a sustainable future by supporting the NHS's journey to **Net Zero** and designing healthcare facilities that support flourishing natural environments and are resilient to future impacts of climate change.

Strategic Goals

Provide high quality employment and training opportunities in key sectors to address current and future skills gaps, thereby supporting these sectors to build capacity and drive growth.

Developing Future Skills

Sharing of Benefits through Collaboration and Partnership

Reduce inequality, in partnership with communities, by ensuring all groups in affected communities have an equal opportunity to contribute to, and share in, the economic, health and wellbeing benefits created by NHP schemes.

Design and deliver health facilities in compliance with the NHS Net Zero Building Standard to support the NHS to achieve net zero for direct emissions by 2040 and support the transition to net zero related construction activities by 2045.

Net Zero

Biodiversity & Future Resilience

Design and deliver healthcare facilities that protect and enhance nature and are resilient to the future impacts of climate change, ensuring long-term operational resilience and the protection of patients, staff and communities.

Focus Areas

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- **Net Zero: Driven by compliance with NHS Net Zero Building Standard and associated tools**
- **Biodiversity Net Gain: Minimum 10% gain aligned to national legislation**
- **BREEAM: Excellent for new builds, Very Good for refurbishment**
- **Reduced resource use: through application of H2.0 and minimisation of waste**
- **Climate Resilience: driven through use of NHS Climate Change Risk Assessment toolkit**
- **Supply Chain sustainability: driven by NHS Evergreen Sustainable Supplier Assessment maturity**

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Key Industry Challenges Identified

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Key Industry challenges – your opportunities

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The NHP is complex due to the **concurrent delivery of multiple schemes across geographies within a similar time frame** – the supply chain pose a significant risk and opportunity

Key challenges

Strong competition
Strong competition from other major projects adds to the constraints, especially in the regions like East of England, Southwest, etc.

Lower appetite
Limited appetite for certain regions and schemes (varying factors, including lower tier capacity, capability and appetite)

Multiple schemes
Multiple schemes in the region with overlapping schedules may require additional logistics and storage support

Limited labour and capacity
Mismatch of demand and supply in terms of labour requirements and delivery capacity

Remote location
Some of the schemes are in more remote locations, which leads to lack of resources or logistics/transport hinderances

Opportunities

Joint Workforce Planning
Creates an incentive for collaboration to co-design shared workforce pipelines, harmonise standards and strengthen the UK talent pool.

Stimulate the Market Confidence & Investment
Provide clearer visibility of pipeline, offer early engagement, support capability building with FE/HE providers and improve market confidence

Regional Hubs and Shared Training Products
Overlapping projects create regional coordination, shared training centres, pooled resources, working a collaborative, coordinated approach

Grow, Upskill and Diversify the Workforce/Supply Chain
Attract new suppliers/entrants, career changers, returners, other sectors, championing modern approaches and inclusive pathways

Offsite and Local Capability and Community
Look at modulisation/off site manufacturing – consolidation centres, local skills solutions, employment closer to communities

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How you can engage with us

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How you can engage with us

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Explore our supply chain resources:
Find information on the programme, NHP schemes, Hospital 2.0 Alliance Partners, our Supplier Guide and recent news at www.competefor.com/nhp
Listen to The Infrastructure Podcast: Hospital 2.0 Alliance

Register to access NHP contract opportunities:
Register and build or update your profile on CompeteFor to access Hospital 2.0 Alliance supply chain opportunities.
This is a free online brokerage tool connecting buyers with suppliers.

Engage with us:
Register your interest in receiving updates with us today, including our Industry Bulletin, by filling in our **Smart Survey.**
For any questions, contact us at nhp.suppliers@nhs.net.
Follow the New Hospital Programme on **LinkedIn**

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Any Questions

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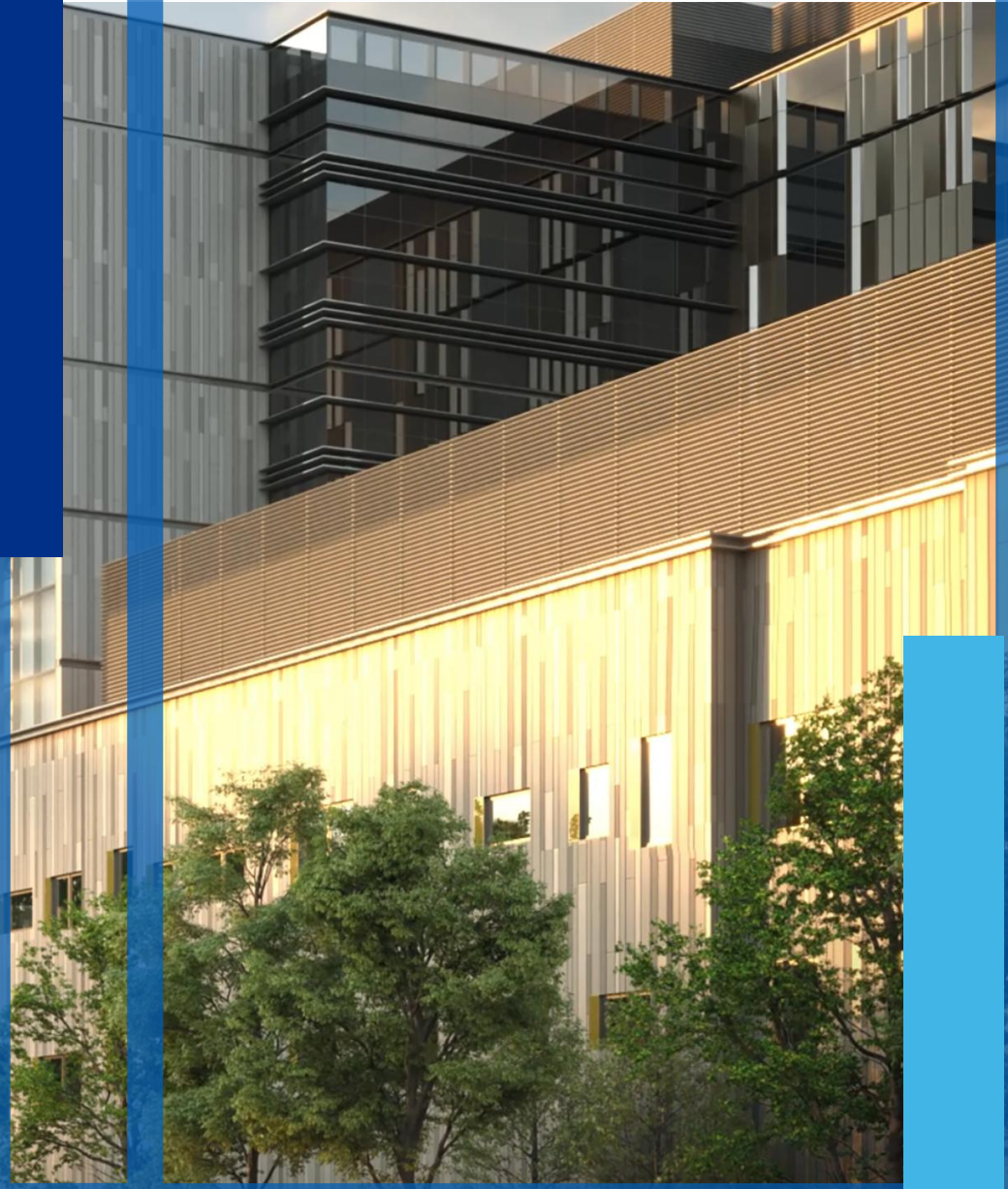
Thank you



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