

Estates, Facilities Management, and Corporate Services Market Intelligence Quarterly Report

September 2025



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Foreword

Between July and September 2025, the Estates, Facilities Management (FM), and Corporate Services sector has continued to evolve under regulatory, market and strategic changes that will shape how decision makers and procurement professionals should plan and align their services.

One of the defining updates in this period is the ongoing implementation of the 2025 NHS Premises Assurance Model (NHS PAM), which consolidates best practice and statutory guidance into a framework for safety, efficiency, and compliance. NHS Trusts are now required to use PAM, linking local estate governance with national benchmarking (via the Model Hospital and ERIC datasets), allowing boards to proactively assess site risks and performance, and easily compare against sector standards. This model has gained further regulatory endorsement and will play an increasingly central role in Care Quality Commission (CQC) inspections over the coming months, with updates in audit methodology anticipated. Every estate must document and demonstrate plans for risk management, remedial actions, and ongoing monitoring through PAM-linked governance.

September 2025 also sees significant focus on operational resilience, especially in the wake of estates safety fund allocations by NHS England. National investment is being directed at critical infrastructure, specifically for buildings flagged as highest risk. Estates and FM teams are expected to ensure transparent tracking, reporting, and evidence of how these funds deliver safety, compliance, and improved patient environments.

Market pressures remain acute, particularly around inflation and workforce cost. Rising energy and staff costs continue to impact estates and FM services, while supply chain disruption and skills shortages persist. Regulatory requirements now demand clearer plans for business continuity, usage of new technologies, and more rigorous asset management. Lower carbon, net zero and digital priorities are accelerating—procurement must now evidence how contracts and frameworks deliver on these NHS and government targets, including supplier commitments to social value and environmental impacts.

It is also notable that the Procurement Act 2023, enacted this February, is being phased into Trust practice. The Act introduces new requirements for transparency, fair competition, and proportionate supplier engagement at all stages of the procurement process. Those acquiring FM and estate services must understand how this affects their contract award, management, and reporting—they must ready themselves for stricter regulatory scrutiny and updated best practice on supplier selection and performance management. Non-compliance with statutory standards or procurement law now presents heightened risk for contract challenge or reputational damage.

Industry practice highlights the importance of strategic collaboration, with growing use of shared service models across regions. Robust contract management, aggregation, and alignment with local and national strategies are enabling both cost savings and improved service outcomes. Trusts are encouraged to use the latest technical standards—such as updated Health Technical Memoranda (HTMs)—for design, installation and operational protocols, which underpin safety and adaptation to changing models of care.

The months ahead will reward proactive engagement and adaptability, positioning estates and FM teams to provide safer, more efficient, and sustainable environments for patients and staff.

Nawaz Habib

Assistant Director for the Estates, Facilities Management and Corporate Services Category at NHS LPP

UK Businesses Economic Outlook

Headline Indicators summary (Source: [House of Commons Library – Economic Indicators](#))

GDP is estimated to have grown by 0.3% in April to June 2025 compared to the previous three-month period (January to March 2025). Eurozone GDP grew by 0.1% in April to June 2025.

Services output was up by 1.2% in April to June 2025 compared to the previous year. **Manufacturing** output increased by 1.0% over the same period.

Productivity across the whole UK economy decreased by 0.6% in Q2 2025 compared with the previous quarter. Compared with the previous year, it was down by 0.8%.

CPI inflation was 3.8% in July 2025, up from 3.6% in June. Inflation in the Eurozone was 2.0% in July 2025, the same level as in June.

The Bank of England's Monetary Policy Committee (MPC) **cut interest rates by 0.25 percentage points to 4.0%** on 7 August. Rates have been cut by 1.25 percentage points overall since August 2024.

Average wages excluding bonuses were 5.0% higher in the three months to June 2025 compared with the year before, and 1.4% higher after adjusting for inflation. CPI inflation for this period was 3.5%.

34.21 million people were in **employment** in April to June 2025, up 725,000 from a year before (but note that other data shows a fall in payrolled employees of 164,000 over the same period). **The employment rate** was 75.3%, up from 74.6% the previous year. 1.67 million people were **unemployed** in April to June 2025, up 206,000 from the year before. The unemployment rate was 4.7%. The UK harmonised **unemployment rate** for Q2 2025 was 4.7%

The **value of sterling** decreased by 1.1% between June and July 2025, having risen by 0.3% between May and June 2025. Compared with a year ago, it is 0.9% higher.

The volume of **retail sales** rose by 0.2% in the three months to June 2025 compared with the previous three months, and increased by 1.8% compared with the previous year.

The ONS (September 2025) reports that nearly a quarter (23%) of trading businesses reported an increase in **the prices of goods or services** bought in August 2025 when compared with the previous month; 9% reported an increase in the prices of goods or services sold in August when compared with the previous month, and both have been broadly stable since May.

Around 1 in 10 (11%) trading businesses expect the prices of goods or services they sell to increase in October 2025, broadly stable with expectations for September; 22% of all trading businesses and 37% of trading businesses with 10 or more employees cited **labour costs** as a reason for considering raising their prices.

Nearly 1 in 5 (18%) businesses with 10 or more employees reported that they were experiencing **worker shortages** in early September 2025, which is broadly stable with early August and has been broadly stable since February.

Estates, Facilities Management and Corporate Services Economic Outlook

UK Energy Prices – Insights and Forecast

The House of Commons Library (September 2025) reported wholesale gas prices have fallen since February 2025, while wholesale electricity prices have remained broadly stable over the last 15 months. These trends have fed into changes in the cap and unit prices for gas will fall by 0.7% in October 2025 while electricity will increase by 2.4%. Standing charges will increase by 12% for gas and 4% for electricity.

Despite the fall in prices in late 2023 and much of 2024, typical bills under the October to December 2025 price cap will still be 44% higher than in winter 2021/22.

Charts 3.4.1 - 3.4.2: Prices of fuels purchased by non-domestic consumers in the United Kingdom

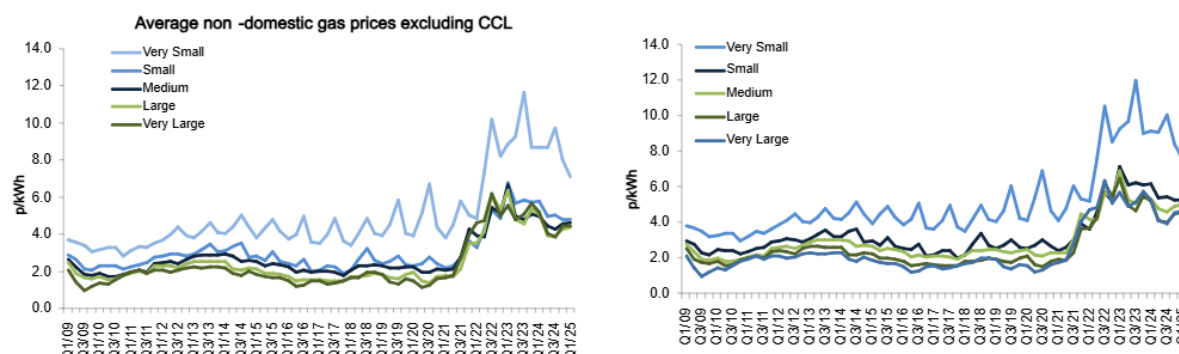


Fig. 1 Non-domestic Gas Prices - Department for Energy Security and Net Zero

From 1 October to 31 December 2025, the price for energy for a typical household who use electricity and gas and pay by Direct Debit will go up by 2% to £1,755 per year. However, compared to the start of 2023, this is £625 (26.3%) lower than when the energy crisis was at its peak.

For a typical household, their energy bills will increase by £2.93 a month or £35.14 per year. This is 2.2% per year higher than the price cap set for the same period last year, from 1 October to 31 December 2024 (£1,717). But when adjusted for inflation, it is 0.9% lower than the same period in 2024. Based on the current inflation rate, a typical household will pay £102 from October to December instead of £100 per month.

QUARTERLY	Oct – Dec (Q4) 2025 TDCV forecast	Standing charge (£/per day)	Per Unit Cost (p/kWh)
Electricity (2,700 kWh)	£905.74	0.54	26.29
Gas (11,500 kWh)	£831.33	0.33	6.19
TOTAL	£1,737.07		

Cornwall Insight has released its final forecast for the October–December 2025 Default Tariff Cap (price cap), following the closure of the observation window on 18 August¹.

The new forecast predicts the cap will rise to £1,737 a year for a typical dual fuel household this winter. This would represent an increase of £17 and 1% from the current price cap which is set at £1,720 per year. Ofgem is scheduled to announce the official cap on 27 August.

The 2025 NHS Premises Assurance Model revision

Over the course of 2025, the NHS Premises Assurance Model (PAM) has undergone significant updates to enhance how NHS Trusts and Integrated Care Boards govern, manage, and invest in their estates and facilities. PAM is not just a compliance tool but a comprehensive, evidence-based framework that bridges the strategic oversight expected at board level with the operational realities of running and maintaining complex healthcare estates. Building on its original purpose to ensure patient environments are safe, clean, and fit for purpose—as enshrined in the NHS Constitution—the 2025 iteration integrates the latest policy directives, regulatory changes, technological advancements, and strategic NHS objectives to offer a nationally consistent approach to estate assurance.

This updated PAM allows NHS provider boards and senior leaders by providing clear, robust data and analysis on the safety, quality, efficiency, and governance of their estates. It transforms estate management from a reactive, fragmented process into a proactive, strategic function. With PAM, Boards can identify risk areas more effectively, prioritise investment decisions, and align these with operational needs and national performance benchmarks such as ERIC and the Model Hospital. This enhanced transparency enables Trusts to demonstrate compliance to regulators and stakeholders, anticipate and mitigate emerging risks, and improve patient experiences by ensuring estates contribute positively to care outcomes.

The update also reinforces PAM's role in supporting government initiatives, including NHS Long Term Plans and the drive towards net zero emissions and digital transformation. By mapping estates' condition and performance comprehensively, PAM helps Trusts plan smarter, sustainable investments that integrate cutting-edge technologies, climate resilience measures, and workforce considerations. Such planning is increasingly critical to meet mounting challenges in cost pressures, ageing infrastructure, regulatory compliance, and evolving models of care.

Alongside PAM, the 2025/2026 Estates Safety Fund directs NHS England's focus and resources to address the highest priority infrastructure risks, demanding clearer accountability and progress reporting from estates and Facilities Management teams. Trusts are required to furnish evidence of how investments are reducing risk and enhancing estate resilience, ensuring taxpayer funds deliver tangible improvements in safety and service quality. Taken together, PAM and these funding streams provide a stronger, more transparent governance framework, enabling Trusts to not just maintain, but systematically improve their estates' contribution to excellent healthcare delivery.

The practical implications for NHS Trusts are significant. Trust boards must embed PAM data and insights within their strategic and operational decision-making cycles, ensuring estates risks and plans are visible and integral to corporate governance. They must build internal capacity and data fluency to utilise PAM effectively, integrate its findings into financial and capital planning, and foster collaborative working between clinical leaders, estates professionals, and procurement teams. This integrated approach ensures estates management moves beyond operational maintenance toward enabling transformational change in patient care environments.

In summary, the 2025 NHS Premises Assurance Model revision represents a maturation of NHS estates governance, aligning regulatory compliance with strategic foresight and operational performance. For NHS Trusts, embracing PAM fully means unlocking greater transparency, enabling prioritised and effective investment, improving safety and patient outcomes, and supporting national ambitions for sustainable, digitally-enabled healthcare estates. The model not only safeguards today's services but builds the foundation for resilient, high-quality care environments in years to come.

Estates, Facilities Management, and Corporate Services Market Overview

Facilities Management Market Overview

A report from Facilities & Estates Management Live sites the facilities management industry has demonstrated remarkable resilience in recent years, adapting to economic shifts, hybrid work models, and the pandemic's impact. FM services often represent significant expenditure, highlighting the constant demand for value-driven workplace solutions. Outsourcing FM remains a key strategy for future-proofing commercial estates, leveraging specialised expertise.

This report explores the major drivers reshaping the FM industry, offering insights for organisations seeking to thrive in this evolving landscape. It focuses on three key areas: Digital, Physical, and Human (Workplace PHD).



Digital

The integration of AI and automation into facilities management services. AI is rapidly transforming facilities management, offering significant improvements in operational efficiency, user experience, and sustainability.

Smart FM solutions, including IoT sensors, BMS alarm analytics, HVAC optimisation, AI-powered BIM and predictive maintenance, will drive operational efficiencies and sustainability efforts, leading to tangible cost savings.

Physical

The narrative around workplace strategy is expanding far beyond hybrid working and the common thread will be the need to reimagine our offices to meet the needs of workforces in 2025 and beyond. The focus is on creating a human-centred workplace experience, supporting the “untethered workforce” with flexible policies and environments. This involves measuring and strategically leveraging the workplace to gain a competitive advantage.

Cost and value for money will remain the primary drivers of FM purchasing decisions. Facilities managers are well-positioned to deliver savings, even on mature contracts. Innovation and cost savings will go hand in hand, with organisations that invest in digitisation seeing the greatest benefits. Cost will also drive ESG initiatives; demonstrating the financial benefits of ESG will help organisations reach net-zero targets faster.

A challenge to the ability of facilities managers to support cost savings is the National Insurance increase, which took effect in April 2025. As a result, facilities management providers start seeking innovative strategies to mitigate its impact on employment opportunities and service quality.

Key Decision Drivers in Purchasing FM Services (Survey Results):

- Cost and Value for Money (77%)
- ESG and Sustainability (27%)
- Service Quality, Innovation, Partnership, Workplace Experience, Technology, Flexibility, and Data/Insight

Human

The next generation workforce is reshaping workplace expectations, requiring companies to navigate a multigenerational workforce. Workplace experience and design are key to fostering collaboration across generations.

Between July and September 2025, Works and Maintenance Services are affected by the wider reforms and evolving sustainability requirements, with procurement increasingly tied to both carbon and social value measurement. Capital and maintenance funding flows are shifting to need-based allocations, and NHS organisations are preparing for three-year revenue and four-year capital settlements beginning in 2026. Regulatory emphasis is on replacing routine maintenance spending with investments that improve energy efficiency, resilience, and the decarbonisation of estate infrastructure. As part of the Greener NHS program, estates are reassessing supplier relationships, infrastructure ownership, and the adoption of innovative onsite waste treatment.

Estates Facilities Management related NHS LPP frameworks

- Total Facilities Management Framework - <https://www.lpp.nhs.uk/categories/estates-facilities-corporate-services/total-facilities-management-framework/>
- Works and Maintenance Dynamic Purchasing System - <https://www.lpp.nhs.uk/categories/estates-facilities-corporate-services/works-and-maintenance-dynamic-purchasing-system/>

Waste Management Services Market Overview

The UK Waste Market is valued at an estimated £30 billion, and projected to reach £40 billion by 2028, the market is characterised by a mix of national players, regional specialists, and niche operators.

As the sector matures, companies are adopting more structured and scalable business models, with technology integration and specialised capabilities playing key roles in differentiation.

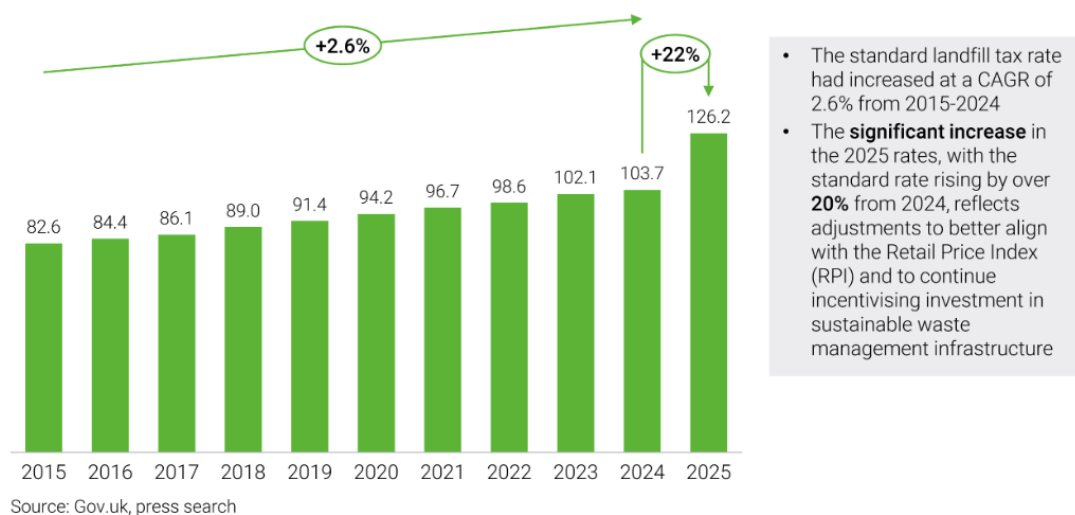
The sector has seen notable consolidation over this period – the top five companies hold over 20% of the market – however, there is still a long tail of smaller businesses which continue to be consolidated, providing opportunity to new entrants looking for targets. These consolidators are aligning their business models with emerging circular economy principles and ESG imperatives. Across the industry, capabilities in emissions tracking, advanced analytics, and customer-centric solutions are being used to generate competitive advantage.



Between July and September 2025, Waste Services have undergone substantial regulatory evolution following the implementation of new waste legislation in March 2025, mandating business segregation of food waste, with exemptions only for very small firms. NHS providers have responded by embedding circular economy principles more deeply, emphasising the reduction, reuse, and sustainable treatment of clinical waste. There has been considerable focus on supplier compliance with sustainability initiatives, and nearly all NHS procurement now incorporates or planning to incorporate carbon reduction planning and social value requirements. The NHS's commitment to sustainable procurement is reinforced by updated technical guidance and a target for reducing clinical waste through innovations and increased waste infrastructure ownership.

A driving force behind the sector's evolution is the escalating emphasis on sustainability and the circular economy, guided heavily by regulatory pressures. Historically, the U.K. depended on widespread landfilling, but the landscape is shifting dramatically. Landfill tax has risen to £126/tonne from April 2025 – a sharp 22% annual increase compared to the modest 2.6% average CAGR from 2015-2024 (figure 3).

Figure 3: Landfill standard tax rate development (2015-2025, £ per tonne)



To thrive, companies are being compelled to adopt technologies that ensure compliance while creating scalable and margin-enhancing service delivery. In particular, firms offering circular economy solutions, such as closed-loop recycling and emissions analytics dashboards, are finding favour among enterprise customers and regulators alike.

Waste Services related NHS LPP frameworks

- Waste Management Services Dynamic Purchasing System - <https://www.lpp.nhs.uk/categories/estates-facilities-corporate-services/waste-management-services-dynamic-purchasing-system/>

Transport Services Market Overview

An Introspective Market Research report (March 2025) predicts substantial growth in the UK Ambulance and Non-Emergency Transport market with projections of £2.25 Billion by 2032, a Compound Annual Growth Rate of 8.23% from 2024 to 2032. One of the drivers for the growth is due to the rate at which people are requiring emergency services and also due to the high incidence of chronic diseases.



Apart from the increase in the standard of living leading to the development of health complications, there is a rise in the proportion of old persons thus, increasing the demand for effective and well-equipped ambulances. The operations of the public ambulances that are funded by the NHS continue to dominate the market while the opportunity for private players emerges to fill the gaps for the emergency and the non-emergency uses.

The public segment which is mainly consisted of the ambulance services which are under the operation of the NHS will continue to channel the major part of the market during the period of the forecast. These services are essential to the health-care system of the United Kingdom, as well as providing a funding by the Government for free emergency response and patient transport services. With existing constraints of inadequate resources and increasing cost of operation local public ambulance services remain ahead since they are readily available and depended on by the majority of the populace. Efforts to update the fleets of ambulances in the National Health Services along with other endeavours to increase the efficiency of the services make this segment invulnerable.

The market also gets a boost when there is new developments such as; telemedicine, tracking system, and advanced moving intensive care unit. The continued investment on training people such as the paramedics and the emergency responders improve the industries capability of tackling essential health challenges effectively.

Between July and September 2025, the NHS and the wider public sector estates and procurement landscape have experienced several significant shifts across key spend categories. For Transport Services, continued demand growth—driven by population aging, chronic illness, and greater integration of telehealth—has accelerated market expansion. The healthcare transport market is forecasted for robust growth, with capacity constraints leading to price increases and a marked push towards sustainable solutions such as electric vehicles and digitalised scheduling. This period also saw a noticeable increase in strategic partnerships with ride-hailing firms, and an emphasis on more accessible transportation for patients with mobility challenges.

Transport Services related NHS LPP frameworks

- Non-Emergency Transport and Other Transport Services Dynamic Purchasing System - <https://www.lpp.nhs.uk/categories/estates-facilities-corporate-services/non-emergency-transport-and-other-transport-services-dynamic-purchasing-system/>

Corporate Services Market Overview

NHS Commissioning Support Unit Arden & GEM's recently surveyed clients through their Strategic Advisory Forum to gain a better understanding of the challenges faced across corporate services. Three common themes emerged from this research:

- Most seemed happy with their current corporate services but they understood the need for change and expressed an appetite to learn more on how they could improve both value and quality.
- Leaders within corporate functions suggested the biggest gains would probably come from embracing technology, with finance, HR, procurement and estates offering the greatest opportunities.
- And finally, many organisations were struggling to identify the improvements in shared services that could deliver the savings required while continuing to meet the needs of their system.



This work provides a valuable resource that NHS organisations can use to explore options for improvements across finance, payroll, procurement, HR and digital.

With over £6bn spent by the NHS on corporate services in 2022, it is inevitable that all health systems will continue to seek efficiency gains from this important area of service delivery.

Between July and September 2025, Corporate Services are adapting to major NHS organisational reforms that began in March 2025, including the planned abolition of NHS England with its functions moving to DHSC, and budgetary pressures for Integrated Care Boards (ICBs). Payment models are being restructured, moving away from block contracts toward outcome- and performance-based tariffs, while supply chain oversight is growing more stringent. This restructuring is intended to give higher-performing trusts greater autonomy over capital spending, reinforce public

performance rankings, and expand the use of private providers to address waiting lists and access issues in deprived areas. All strategic planning for 2026 and beyond is required to align with new guidance emphasising quality, patient experience, and value.

Corporate Services related NHS LPP frameworks

Estates & Facilities Consultancy Services Dynamic Purchasing System - <https://www.lpp.nhs.uk/categories/estates,-facilities-corporate-services/estates-facilities-consultancy-servicesdynamic-purchasing-system/>

Payroll Services - <https://www.lpp.nhs.uk/categories/estates-facilities-corporate-services/payroll-services-framework/>

Analysis and Recovery Framework - <https://www.lpp.nhs.uk/categories/estates-facilities-corporate-services/analysis-and-recovery-framework/>

Sustainability - EFCS

NHS published their 5 year progress report and updated their methodology in September. Buildings energy, waste, water and refrigerants have seen a carbon footprint reduction of 0.4MtCO₂e, around a 10% reduction. This has been driven by:

- Trust waste emissions – 32% reduction
- Emissions associated with grid electricity – 21% reduction

This reflects the investments made in estate decarbonisation as well as the increasing proportion of renewables in our energy mix. However, emissions associated with the use of gas accounted for around 40% of the NHS carbon footprint and have reduced by just 1% since 2019/20. Fleet and travel have also shown no reduction in their carbon footprint.

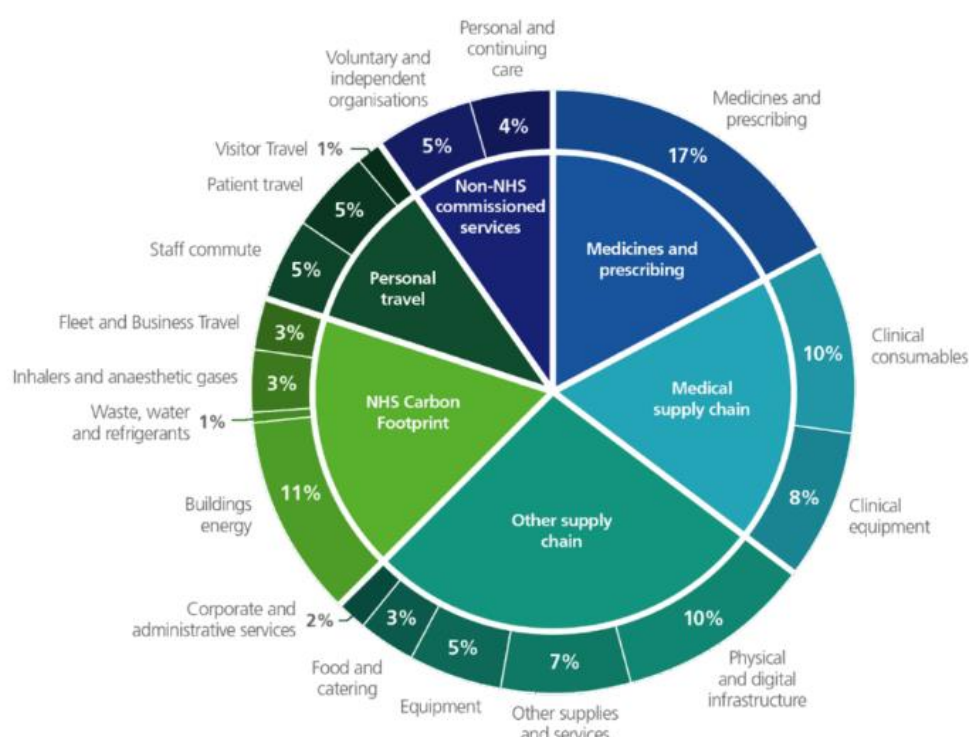
The NHS Net Zero Travel and Transport Strategy sets a target of all new vehicles owned or leased by the NHS to be zero emission by 2027, with ambulances from 2030. All trusts and ICBs are expected to develop a sustainable travel strategy by the end of 2026. Our Sustainability and Social Value Team can support on this.

The Public Sector Decarbonisation Scheme is discontinuing. This is a significant source of funding for decarbonisation projects across the NHS estate, with £1.4billion additional capital received through this funding. This looks set to be replaced with more specific funds for NHS and the public sector such as the £100m Great British Energy fund for solar panels across the NHS trusts. If any awarded trusts are seeking a compliant route to market for this fund, the NHS LPP Works and Maintenance DPS has an onsite generation lot. Our Sustainability and Social Value team are also able to advise on appropriate modern slavery terms to compliment this DPS. It is advisable for trusts to have project plans prepared for short notice funding releases, similar to those seen at the end of 2024.

Savings and efficiencies, particularly in energy and heating, continue to be key themes in sustainability and decarbonisation. Trusts are identifying opportunities such as switching operating theatres and ventilation off outside of working hours, which research is showing can be done safely and can save significant amounts of energy, money and carbon. These schemes are strengthening business cases for smart metering, monitoring and energy management. Implementation of these schemes are complex but yield significant energy and time savings, including on reporting both estates and environmental information.

The model ICB and region blueprints have been published which identify sustainability and green plan as functions recommended to move from ICBs to providers, however, there continues to be uncertainty as to future structure, particularly given the legal duty of ICBs to work towards net zero by 2040. Against this backdrop trusts and ICBs are publishing their Green Plans this autumn and NHS LPP have assisted in the writing of some of these. Following on from this engagement NHS LPP are hosting their first Sustainability Forum on 28th October at 2-3pm. Email simon.rowland7@nhs.net if you would like to attend.

Finally, the new Social Value Model comes into force in October. NHS LPP are developing a refined approach to their approach to social value in procurement, including adopting Atamis. For more information contact our Sustainability and Social Value Team.



Corporate Services related NHS LPP frameworks

- CPC Drive – NPA framework offering electric only company cars
- NEPT – Our NEPTS DPS contains suppliers with electric fleets to support trust carbon reduction targets and the NHS Net Zero Travel and Transport Strategy
- Works and Maintenance Dynamic Purchasing System - <https://www.lpp.nhs.uk/categories/estates-facilities-corporate-services/works-and-maintenance-dynamic-purchasing-system/>

NHS LPP EFCS News

The NHS London Procurement Partnership EFCS team is re-procuring the Non-Emergency Patient Transport Services as a Framework Agreement under the Provider Selection Regime. This agreement will focus on quality & innovation, value, sustainability and social value, offering members and the wider NHS an agreement to meet the changing needs of the NHS and NEPT.

The procurement of this Non-Emergency Patient Transport (NEPT) Framework Agreement, is directly aligned with both national and organisational strategies to modernise, integrate, and improve patient transport services.

This new framework agreement supports the NHS Long Term Plan's emphasis on integrated care, patient-centred services, and sustainability, as well as local Integrated Care System (ICS) objectives to deliver high-quality, efficient, and equitable healthcare support services.



NHS LPP Contacts

Should you wish to discuss any of the highlighted NHS LPP agreements, please feel free to contact the respective Category teams below

NHS LPP Agreement	Contact
Estates & Facilities Consultancy Services Dynamic Purchasing System	risha.mehta@nhs.net / nathan.jones17@nhs.net
Minor Works and Maintenance Dynamic Purchasing System	ashwaq.fraser2@nhs.net / remmy.kamya@nhs.net
Non-Emergency Transport and Other Transport Services Dynamic Purchasing System	ashwaq.fraser2@nhs.net / remmy.kamya@nhs.net
Total Facilities Management Framework	j.rumsey@nhs.net / remmy.kamya@nhs.net
Waste Management Services Dynamic Purchasing System	risha.mehta@nhs.net / nathan.jones17@nhs.net
Corporate Services (Professional Services)	ashwaq.fraser2@nhs.net / risha.mehta@nhs.net
Sustainability	Simon.Rowland7@nhs.net

Feedback

We would love to hear from you. If you have any suggestion on what you want to see in the next Quarterly report, please email: customer@lpp.nhs.uk

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