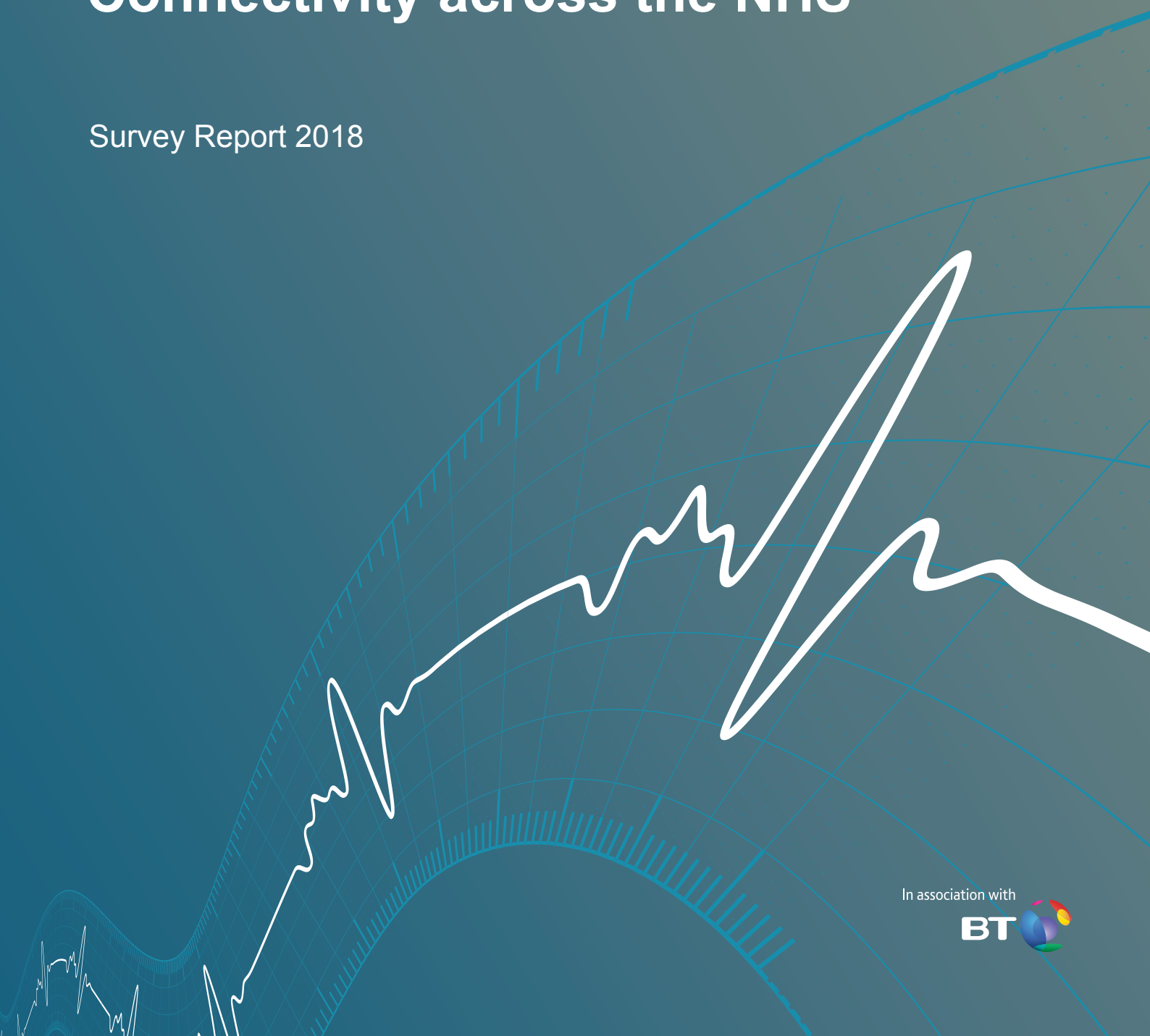
iGOV survey

Connectivity across the NHS

Survey Report 2018



In association with BT

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iGOV survey

Acknowledgements

The survey team at iGov Survey would like to take this opportunity to thank all of those who were kind enough to take part – and especially to those who found the time to offer additional insights through their extra comments. We would also like to thank our partner, BT Business and Public Sector, for their assistance in compiling the survey questions, scrutinising the responses and analysing the results.

To contact the iGov Survey team:
Email: speet@ingenium-ids.org Tel: 0845 094 8567
Address: FAO Sandra Peet, Pacific House, Pacific Way, Digital Park, Salford Quays, M50 1DR

The Survey

The transition from N3 to the Health and Social Care Network (HSCN) is considered to be one of, if not the biggest ever transformation facing the NHS and healthcare organisations today.

But with any major transformation comes a mix of challenges and opportunities for the sector, as organisations begin to adopt new ways of working, particularly with regard to information-sharing.

That is why our latest survey, in partnership with BT Business and Public Sector, considered how this transformation will dramatically change how information is shared and the revolutionary impact it is expected have on how the NHS manages its connectivity as a whole.

In particular, our survey focused on the following:

- current pressures for IT teams and their impact on service delivery;
- perceived benefits and challenges for HSCN migration; and
- mobility strategies, level of adoption and challenges.

Following extensive review, we have now collated the resulting outcomes and the following report contains a summary of our key findings.

Survey Methodology and Respondents' Profile

This survey was conducted by iGov Survey in collaboration with BT. The project ran from 9th November 2017 to 12th December 2017.

Survey respondents represented a broad cross-section of job roles across NHS, Clinical Commissioning Groups and the wider healthcare sector. This included: Chief Executive, Clinical Director, Chief Information Officer, Chief Operating Officer, Chief Clinical Information Officer, Head of Infrastructure, Head of IT, Health Informatics Director, ICT Director, Corporate Governance Manager, IT Engagement Lead and IT Service Delivery Manager.

53 individuals from 50 unique organisations participated in the survey, each of whom will have received a complimentary copy of the findings report. There was no inducement to take part in the survey, and BT was not introduced as the survey partner.

The results displayed throughout this report are based on those who fully completed the questionnaire and are displayed as a percentage of this group, unless explicitly stated otherwise.

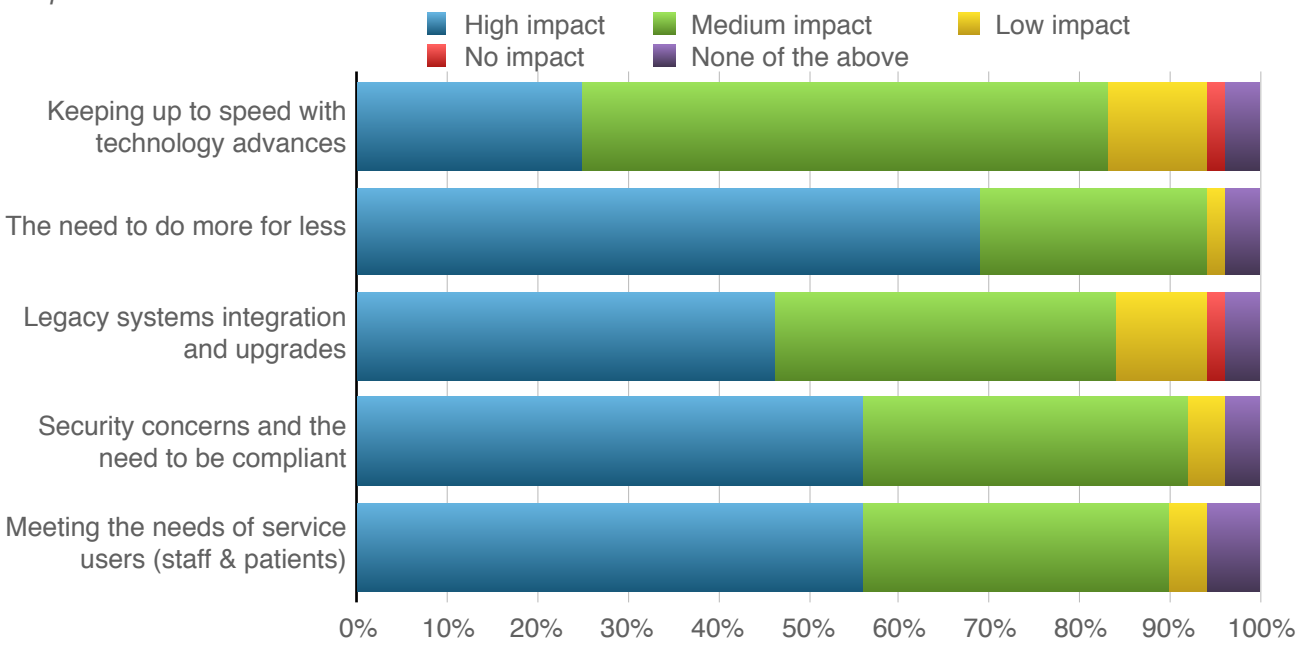
Key Findings

The three greatest pressures impacting most IT departments across the NHS and healthcare are: the need to do more for less (69%), security concerns and the need to be compliant (56%), and meeting the needs of service users - staff and patients (56%)

Keeping up to speed with technology advances is the most cited as having the lowest impact on IT departments but overall, the IT pressures listed in the chart below have either a high or medium impact.

According to our survey participants, 25% plan to review their IT strategy within three months and just over three-fifths of participants plan to review within the next 12 months. Moreover, two-fifths of participants surveyed have plans to integrate the IT environment with other areas of the health and care ecosystem locally.

FIGURE 1: *Which of the following represent key pressures for your IT department and what is the level of impact?*



With regard to migration from N3 to HSCN (Health and Social Care Network), the majority of organisations surveyed are at the scoping stage (46%), with 32% unable to answer

This is not surprising with the accredited suppliers coming on stream and the changeover expected to take up to twelve months, there is still time to deliver.

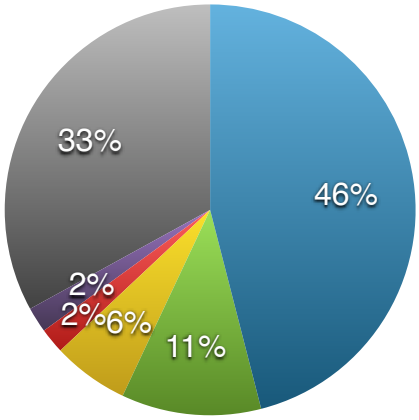


FIGURE 2: *With regard to migration from N3 to HSCN (Health and Social Care Network), at what stage of the journey are you?*

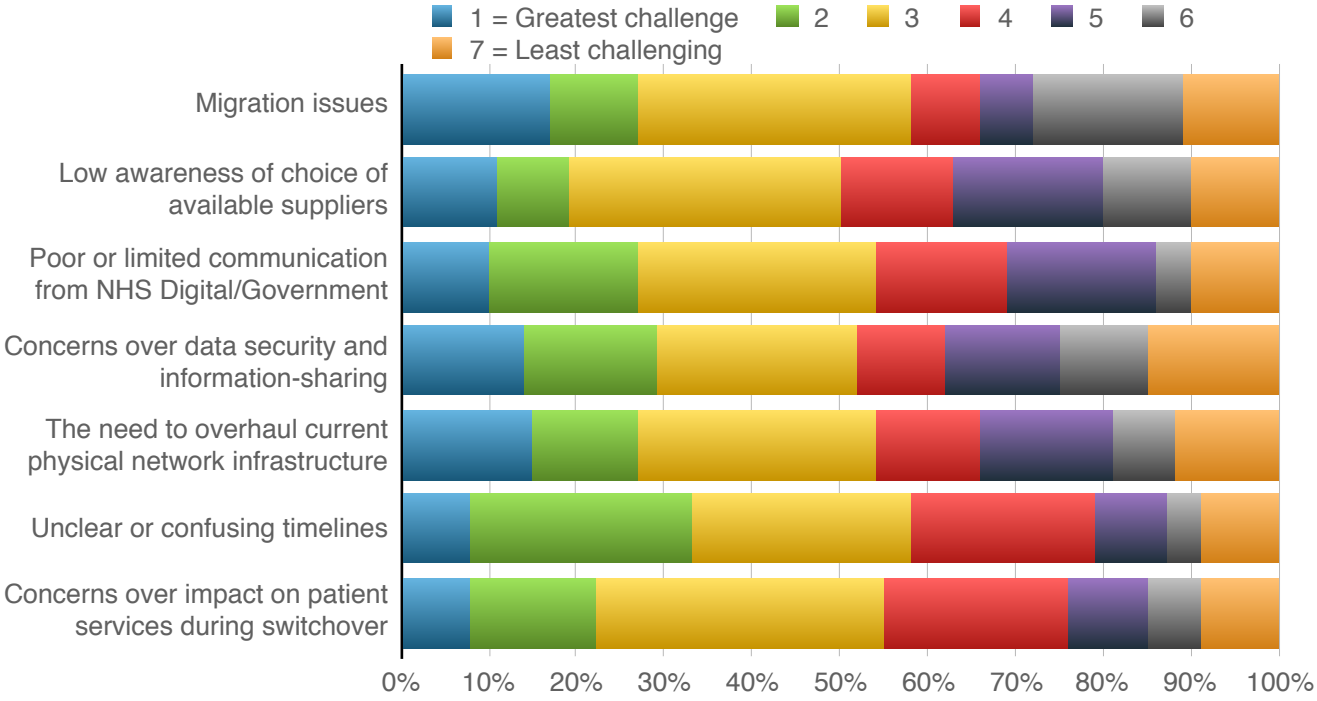
- Scoping stage
- Adoption stage
- Implementation stage
- Roll-out
- Other
- Don't know

The way in which HSCN is expected to benefit organisations the most is via greater collaboration and join up between health and social care providers (42%)

This is encouraging to see given the direction of travel government is taking in moving towards promoting collaborative ways of working across healthcare and with other agencies.

The biggest challenge concerning HSCN to date is a perception that unclear timelines for switchover are creating confusion, which could explain the slow movement in migrating to HSCN. In fact, this is cited above issues around migration, overhauling infrastructure and concerns over data security and information-sharing.

FIGURE 3: *Which of the following posed the biggest challenge for your organisation with regard to HSCN to date?*



Just 38% of organisations surveyed have a specific procurement plan in place regarding HSCN

The need for more complex procurements is viewed as having the greatest impact on IT departments but an increase in staff workload is also cited as a significant factor. This concern may relate to staff resourcing and current expertise, which could require a new training focus around delivering procurement solutions.

The preferred procurement route for the majority of participants is to collaborate with other organisations, with just 6% taking an organisation-owned procurement route and 19% planning to join a centrally managed procurement route.

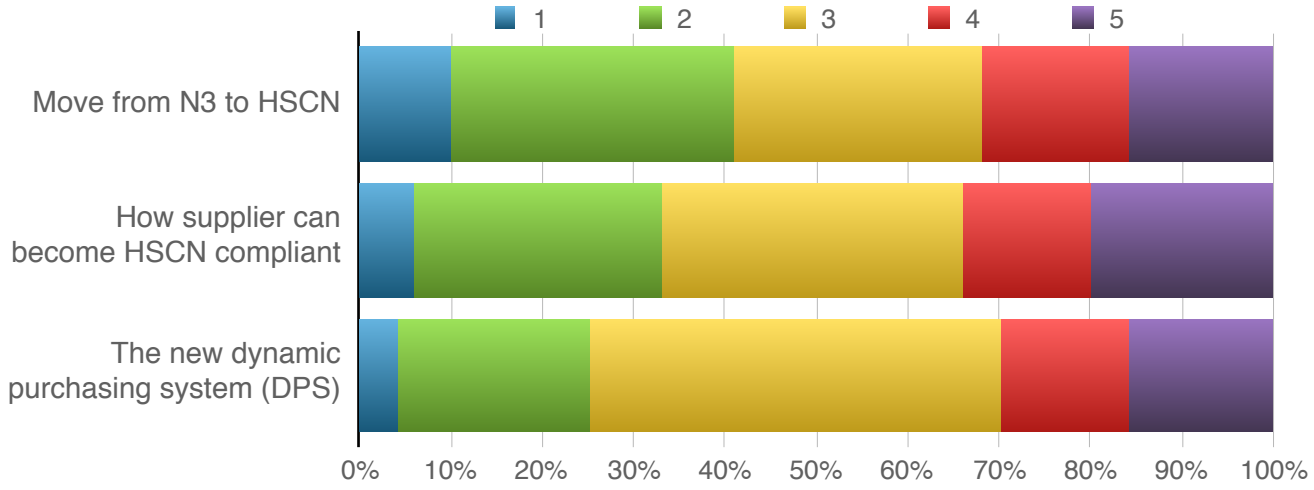
Choosing the right supplier is key, with two-fifths of participants currently actively sourcing new suppliers able to deliver fit for purpose solutions that meet individual needs. However, a further fifth of participants are concerned about any delays to service provision caused by supplier demand.

Just under half of participants take a solutions-focused approach to interacting with suppliers, i.e. a few strategic suppliers, which aggregate solutions.

With regard to perceived awareness across current suppliers, less than 10% of participants say suppliers are very aware of the move from N3 to HSCN, 5% on how to become HSCN compliant, and just 4% on the new dynamic purchasing system.

Government has published guidance on how suppliers can become HSCN compliant but there is clearly more to be done by suppliers to demonstrate an understanding of the processes they need to follow to be compliant.

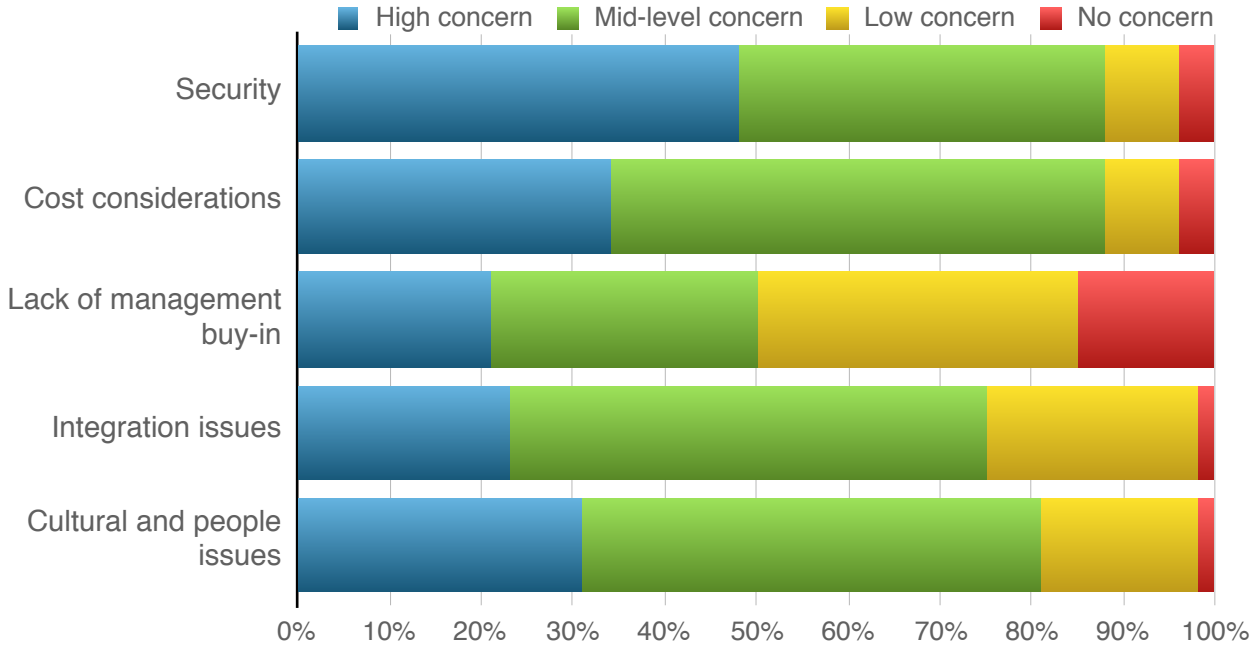
FIGURE 4: *In your opinion, how aware are suppliers of the following?*



64% of organisations have a mobility strategy, which enables people to access applications and information wherever they need to work

35% of participants say mobile devices are used by 11-25% of the workforce, for work purposes. 84% believe the level of mobile adoption will change in the next 24 months. The area of highest concern for participants with their organisation's mobile strategy is security (48%). In fact, 88% of participants perceive it as an area of high and mid-level concern.

FIGURE 5: *How concerned are you about the following perceived challenges with regard to your mobile strategy?*



Conclusion

by Jason Hall, Director at BT Health

With the drive towards digital transformation in the NHS, we worked with iGov Survey to find out what is driving IT strategy across the NHS, especially in light of the new Health and Social Care Network. What are the expectations of people at the sharp end of service delivery for better collaboration between health and social care?

It's encouraging that people are positive towards HSCN – which is good news for NHS Digital. While organisations are at various stages of migrating to the new network, there are some clear needs identified in terms of what IT needs to deliver:

- There's no surprise that security is a key concern. Clearly any digital transformation needs to have security integrated at every level. How do you do digital transformation securely?
- Mobility use is expected to grow – but concerns around security, cost, people issues and management buy-in persist.
- The need to do more for less is a key focus for our customers in thinking about their IT strategy.
- More than half of participants are reviewing their IT strategy in the next 12 months and are looking for collaborative options – often with social care organisations, adding additional complexity to the challenge.

At BT, we believe that the Health and Social Care Network offers huge opportunities as a platform for health and care organisations to underpin digital transformation strategies and truly transform how services are delivered.

To achieve this, organisations need to select a partner with the capabilities and portfolio to deliver the network connectivity required. But there's much more that can be achieved to deliver better collaboration for example, extending the reach of the network using smart digital devices. And all of this needs to be done with security built in on both network and devices.

As a key supplier via the Emergency Services Network, we're proud of our people, portfolio and experience in working with the NHS. We can help to think 'beyond the network' to consider overlay services that will help you achieve your goals.

We'd like to understand more about your plans for migration to the HSCN and how we can meet your current and future needs. And we'd love to understand more about your plans for delivering the digital transformation required to meet the challenges of the 5 year forward view.

Please visit bt.com/hscn to find out more.

Appendix 1: Survey Questions

Grid Question: Which of the following represent key pressures for your IT department and what is the level of impact?

Keeping up to speed with technology advances

Answer	Percent
High impact	25%
Medium impact	58%
Low impact	11%
No impact	2%
None of the above	4%

The need to do more for less

Answer	Percent
High impact	69%
Medium impact	25%
Low impact	2%
No impact	0%
None of the above	4%

Legacy systems integration and upgrades

Answer	Percent
High impact	46%
Medium impact	38%
Low impact	10%
No impact	2%
None of the above	4%

Security concerns and the need to be compliant

Answer	Percent
High impact	56%
Medium impact	36%
Low impact	4%
No impact	0%
None of the above	4%

Meeting the needs of service users (staff and patients)

Answer	Percent
High impact	56%
Medium impact	34%
Low impact	4%
No impact	0%
None of the above	6%

Question: With regard to your current IT strategy, is this something you plan to review:

Answer	Percent
Within three months	25%
Within six months	17%
Within twelve months	21%
Post twelve months	10%
We don't have an IT strategy in place	2%
Other - please specify	19%
Don't know	6%

Question: If you have an IT strategy, which of the following key technologies form part of this?

Answer	Percent
EPR (Electronic Patient Records)	79%
Clinical systems	83%
Network and IT infrastructure	85%
Mobile	63%
Enterprise mobility management	44%
Private Cloud	15%
Public Cloud	6%
Hybrid Cloud	19%
Collaboration technologies and tools	50%

Question: Does your organisation have plans in place to integrate your IT environment with other areas of the health and care ecosystem locally?

Answer	Percent
Yes - within 12 months	41%
Yes - within two years	27%
Yes - within five years	17%
Yes - within ten years	0%
No	15%

Question: With regard to migration from N3 to HSCN (Health and Social Care Network), at what stage of the journey are you?

Answer	Percent
Scoping stage	46%
Adoption stage	11%
Implementation stage	6%
Roll-out	2%
Other - please specify	2%
Don't know	33%

Grid Question: How much of an impact has HSCN had to date on IT and wider departments with respect to the following?

Increased staff workloads

Answer	Percent
High impact	18%
Medium impact	35%
Low impact	35%
No impact	12%

More complex procurements

Answer	Percent
High impact	16%
Medium impact	35%
Low impact	29%
No impact	20%

Need for further skills training

Answer	Percent
High impact	14%
Medium impact	29%
Low impact	35%
No impact	22%

Investment in additional resources, for example, people, hardware or software

Answer	Percent
High impact	25%
Medium impact	24%
Low impact	33%
No impact	18%

Grid Question: In which of the following ways do you believe HSCN will benefit your organisation? Please rank from 1 to 5, with 1 = significant benefit and 5 = no benefit at all.

Greater flexibility

Answer	Percent
1	23%
2	25%
3	31%
4	13%
5	8%

Greater collaboration/join-up between health and social care providers

Answer	Percent
1	43%
2	15%
3	15%
4	19%
5	8%

Improved efficiencies

Answer	Percent
1	25%
2	21%
3	29%
4	17%
5	8%

Greater value for money

Answer	Percent
1	23%
2	14%
3	38%
4	15%
5	10%

Wider supplier choice

Answer	Percent
1	17%
2	23%
3	33%
4	15%
5	12%

Grid Question: Which of the following has posed the biggest challenge for your organisation with regard to HSCN to date? Please rank from 1 to 7, with 1 = greatest challenge and 7 = least challenging.

Migration issues

Answer	Percent
1	17%
2	10%
3	31%
4	8%
5	6%
6	17%
7	11%

Low awareness of the choice of available suppliers

Answer	Percent
1	11%
2	8%
3	31%
4	13%
5	17%
6	10%
7	10%

Poor or limited communication from NHS Digital/Government

Answer	Percent
1	10%
2	17%
3	27%
4	15%
5	17%
6	4%
7	10%

Concerns over data security and information-sharing

Answer	Percent
1	14%
2	15%
3	23%
4	10%
5	13%
6	10%
7	15%

The need to overhaul current physical network infrastructure

Answer	Percent
1	15%
2	12%
3	27%
4	12%
5	15%
6	7%
7	12%

Unclear or confusing timelines for switchover

Answer	Percent
1	8%
2	25%
3	25%
4	21%
5	8%
6	4%
7	9%

Concerns over impact on patient services during switchover

Answer	Percent
1	8%
2	14%
3	33%
4	21%
5	9%
6	6%
7	9%

Question: Does your organisation have a specific procurement plan in place regarding HSCN?

Answer	Percent
Yes	38%
No	12%
Don't know	50%

Question: Which of the following procurement routes does your organisation plan to follow? Please tick all that apply.

Answer	Percent
Organisation-owned procurement	6%
We plan to collaborate with other organisations	33%
We plan to join a centrally managed procurement	19%
Other - please specify	4%
Don't know	38%

Question: With regard to suppliers, which of the following best represents the current state of play for your organisation?

Answer	Percent
We are actively sourcing new suppliers, which can delivery fit-for-purpose solutions that meet individual needs	39%
We recognise the need to source and identify new suppliers but are unsure as to the process for doing so	17%
We have started to source new suppliers but are concerned about any delays to service provision caused by supplier demand	21%
Other - please specify	23%

Question: In which of the following ways do you interact with supplier?

Answer	Percent
Self-build/managed: purchase standalone products and services from large supplier ecosystems	19%
Solutions focused: A few strategic suppliers, which aggregate solutions	46%
Outsourced/strategic partner model: One strategic partner to help define strategy and deliver end to end IT	14%
Other - please specify	21%

Grid Question: In your opinion, how aware are suppliers of the following? Please select from 1 to 5, with 1 = very aware and 5 = not aware at all.

Move from N3 to HSCN

Answer	Percent
1	10%
2	31%
3	27%
4	16%
5	16%

How suppliers can become HSCN compliant

Answer	Percent
1	6%
2	27%
3	33%
4	14%
5	20%

The new dynamic purchasing system (DPS)

Answer	Percent
1	4%
2	21%
3	45%
4	14%
5	16%

Question: Do you have a mobility strategy for your organisation, which enables people to access applications and information wherever they need to work?

Answer	Percent
Yes	64%
No	21%
Don't know	15%

Question: What percentage of your staff use mobile devices for work purposes?

Answer	Percent
Up to 10%	8%
11 to 25%	35%
26 to 50%	13%
51 to 75%	19%
More than 75%	15%
Don't know	10%

Question: Do you think the level of mobile adoption will change in the next 24 months?

Answer	Percent
Increase	84%
Decrease	0%
Remain the same	8%
Don't know	8%

Grid Question: How concerned are you about the following perceived challenges with regard to your mobile strategy?

Security

Answer	Percent
High concern	48%
Mid-level concern	40%
Low concern	8%
No concern	4%

Cost considerations

Answer	Percent
High concern	34%
Mid-level concern	54%
Low concern	8%
No concern	4%

Lack of management buy-in

Answer	Percent
High concern	21%
Mid-level concern	29%
Low concern	35%
No concern	15%

Integration issues

Answer	Percent
High concern	23%
Mid-level concern	52%
Low concern	23%
No concern	2%

Cultural and people issues

Answer	Percent
High concern	31%
Mid-level concern	50%
Low concern	17%
No concern	2%

Appendix 2: Participating Organisations

Abertawe Bro Morgannwg University Health Board
Birmingham Women's and Children's NHS Foundation Trust
Cambridge University Hospitals NHS Foundation Trust
Cambridgeshire and Peterborough NHS Foundation Trust
Castle Craig Hospital
Central and North West London NHS Foundation Trust
Chesterfield Royal Hospital NHS Foundation Trust
Central and North West London NHS Foundation Trust
East Sussex Healthcare NHS Trust
Essex Partnership University NHS Foundation Trust
Great Ormond Street Hospital for Children NHS Foundation Trust
Guildford & Waverley CCG
Health Education Wessex Isle of Wight NHS Trust
Lancashire Care NHS Foundation Trust
Leeds and York Partners hip NHS Foundation Trust
London Leadership Academy
Maidstone and Tunbridge Wells NHS Trust
Medway
NEL Commissioning Support Unit
NHS Barnet CCG
NHS Bury CCG
NHS Dorset CCG
NHS England
NHS Forth Valley
NHS Lanarkshire
NHS Lewisham CCG
NHS North Hampshire CCG
NHS North West Surrey CCG
NHS South Devon and Torbay CCG
NHS Wakefield CCG
NHS West Essex CCG
North East Ambulance Service NHS Foundation Trust
Northumbria Healthcare NHS Foundation Trust
Nottinghamshire Health Informatics Service
Oxford University Hospitals NHS Foundation Trust
Oxleas NHS Foundation Trust
Plymouth Hospitals NHS Trust
Poole Hospital NHS Foundation Trust
Royal Brompton & Harefield NHS Foundation Trust
Royal Surrey County Hospital NHS Foundation Trust
South Central Ambulance Service NHS Foundation Trust
South East Coast Ambulance Service NHS Foundation Trust
Southern Health NHS Foundation Trust
Southport and Ormskirk Hospital NHS Trust
The Pennine Acute Hospitals NHS Trust
The Queen Elizabeth Hospital
King's Lynn NHS Foundation Trust
West Suffolk NHS Foundation Trust
Wirral University Teaching Hospital NHS Foundation Trust
Wrightington, Wigan and Leigh NHS Foundation Trust