

Adult Social Care: Market Position Statement 2026

Claire Hooley, Assistant Director, Commissioning and
Market Management
March 2026

[Adult Social Care Market Position Statement | Adult
Social Care Market Position Statement | Oldham
Council](#)



Contents

- To provide a clear understanding of what a Market Position Statement is and why it matters
- To outline the current picture of Adult Social Care provision locally
- To highlight future demand, commissioning intentions, and the role of councillors in shaping the market

What is a Market Position Statement (MPS)

- A strategic document produced by the local authority, a requirement of the Care Act 2014
- Sets out the **current and future needs** of residents who may require care and support
- Describes the **range, quality, and capacity** of services currently available
- Signals to providers the **direction of travel**, priorities and opportunities for market development
- Helps ensure a **sustainable, diverse and high-quality care market**

Why it matters

- Supports the Council's statutory duties under the Care Act 2014
- Ensures residents have choice, control, and access to good-quality care
- Helps the market remain stable and resilient, especially during financial and workforce pressures
- Provides transparency for providers, partners and the public
- Enables all stakeholders including councillors to understand pressures, risks, and investment priorities

Oldham's strategic commissioning documents

Rather than one single document, Oldham's Market Position Statement is made up of several documents, each offering different types of information. Our approach allows the commissioning service to:

- **Update time-sensitive elements** (such as commissioning priorities and the delivery plan) more frequently
- **Keep stable data** (such as population information – which is derived from national data sets such as the ONS) and review on a yearly cycle

While the entire MPS is reviewed at least annually, some components maybe updated more frequently, depending on changes in the local care market

Oldham's suite of Market Position Statement documents

- **Capacity and Demand Summary:** provides a high-level summary of Oldham's population and its projected growth. It outlines the type of provision expected to see increased demand and identifies current supply issues and development areas
- **Capacity and Demand Profile:** more detailed analysis of Oldham's population projections and expected demand for different care types. It is particularly useful for care providers developing business cases.
- **Commissioning Delivery Plan:** the document sets out planned commissioning activity, including developments requiring accommodation as part of the adult social care model. Procurement timelines are outlined

Oldham's suite of Market Position Statement documents

- **Contract and Quality Assurance and Improvement Approach:** outlines how we monitor the quality of contracted services, including any joint arrangements with the GM ICB. This document may also be of interest to service users and their families, as it explains how we respond to concerns about provider performance.
- **Fees Paid for Adult Social Care Services:** provides details on annual commissioned fees and explains our approach to complex and out of borough fee arrangements.
- **Service Specific Commissioning Statements:** these concise statements offer an overview of our commissioning intentions and identified gaps for specific types in the borough.
- **Fair Cost of Care:** during 2022/23 all councils in England were required by the Dept of Health and Social Care to complete a Market Sustainability and Fair Cost of Care exercise. As required, these documents are published.

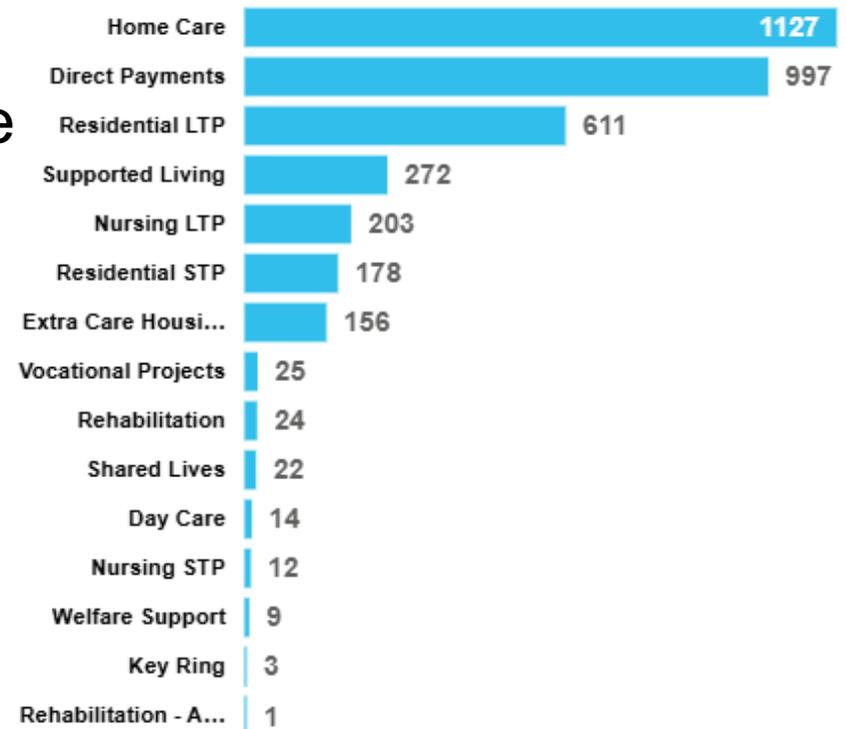
Oldham's Local Picture – Adult Care Provision

Overview of population demographics and projected growth

- Oldham's population of 242,089 (*2021 Census data*) is projected to increase by 10% by 2040.
- The over 65 population is projected to increase from 16.58% in 2023 to 19.58 in 2040, this is growth of over 10,000 people.
- The Oldham population of over 85 is projected to increase by 39.1% by 2040.
- Projections also show a significant increase in people over 65 with dementia by 2040, with the increase predicted to risk more sharply from 2025 onwards.
- The number of people with early onset dementia are also forecast to increase by 2040, with a gender split of prevalence towards men.
- **Adult Social Care can therefore expect a continued rising demand on the need for social care support and commissioned services.**
- Oldham has a higher proportion (31.9%) of non-white residents than Greater Manchester (GM) (23.6%) or England (19%) and required services suitable to meet the diverse needs of the community.
- The Black and Minority Ethnic (BAME) population has been increasing gradually and is expected to continue to increase. This is particularly anticipated around the Bangladeshi and Pakistani communities.
- The number of people with statutory care and support needs living with a parent is also predicted to increase by 2040. Of particular significance is the proportions of residents living with parents who are 55-64m in these cases parents will be elderly, which presents a high likelihood of a breakdown in care arrangements.

Key service areas

- Home care
- Residential and Nursing care
- Supported Living
- Extra Care Housing
- Day opportunities
- Carers' support



Summary of current market strengths and challenges

- Workforce recruitment and retention
 - Oldham has slightly higher than national and regional average in recruitment and retention rates (presented as appendix 1)
- Financial pressures and provider sustainability
 - No provider has handed back contracts in over two years
 - Open and transparent fee review processes
- Quality and CQC ratings (presented as appendix 2)
- Capacity issues and demand trends
 - Robust commissioned frameworks in place
 - Areas of focus for 12-18 months, increase provision in borough for people requiring supported living services
- Market fragility and provider exits
 - Thorough market risk and oversight management in place

Future Demand and Pressures

- Increasing numbers of older people and adults with complex needs
- Growing demand for dementia care, supported living, and community-based support
- Rising expectations around personalisation, independence, and digital solutions
- Ongoing cost pressures across the sector
- Need for innovation and new models of care to support long-term sustainability

Commissioning intentions

- Strengthen prevention and early intervention
- Expand and modernise community-based support.
- Improve accommodation-based options and availability, including supported living and extra care.
- Support providers with workforce development and quality improvement.
- Encourage innovation and flexible models of care
- Maintain a focus on value for money while prioritising the quality of services provided.
- Work collaboratively with NHS partners, the voluntary sector and independent providers.

What Providers can expect from the Council and Adult Social Care

- Clear communication about our priorities and expectations.
- Opportunities for co-production and partnership working.
- Support with quality improvement and workforce initiatives.
- Transparent commissioning and procurement processes.
- A commitment to ethical and fair commissioning practices.

The Role of Councillors

- Provide democratic oversight of commissioning and market-shaping activity.
 - Overview and Scrutiny
 - Council's Constitution and our Contract Procedure Rules
 - Market Position Statement
 - Relevant legislation and duties
- Understand the pressures and opportunities within the local care market.
- Champion the needs of residents, carers and communities.
- Support strategic decisions on investment and service development.
- Help maintain public confidence in Adult Social Care market shaping and oversight duties

Development priorities

Service Area	Plan to address	Timeline
Residential and Nursing in borough provision	<ul style="list-style-type: none"> ➤ Oldham Total Care ➤ Develop existing market to upscale and diversify existing provision ➤ Consult and influence current developments 	<ul style="list-style-type: none"> • OTC to transfer 2025/26 • Ongoing engagement with the market
Extra Care Housing	<ul style="list-style-type: none"> ➤ Review care contract and service specification, liaising with the PFI contract with Housing 21's service delivery model ➤ Consider options for 24 hour care ECH models (where demand is required) ➤ Continue work with Economy and Place colleagues to scope development plan 	<ul style="list-style-type: none"> • Continue to work through feasibility with Housing Strategy on ECH site for development • Complete recommissioning (tender) activity due to contracts coming to an end • New contract tendered and in place summer 2026
Specialist Accommodation	<ul style="list-style-type: none"> ➤ Business case in development, working with strategic housing to identify properties for redevelopment/refurbishment ➤ CBA to be completed early 2026/27 	<ul style="list-style-type: none"> • Additional capital allocated to ASC of £10m over the next three years • Continue work with housing strategy to develop a business case for identified sites (council assets)
Shared Lives	<ul style="list-style-type: none"> ➤ Consider opportunities for upscaling Shared Lives provision as an alternative to standard housing and care options 	<ul style="list-style-type: none"> • Pilot in place 25/26 – 26/27 through GM allocated funding. Review to take place considering permanent expansion
Reablement	<ul style="list-style-type: none"> ➤ Ensure the service is able to support people from the community as well as from hospital discharge focusing on prevention and community services ➤ Ensure the service is equipped to support people with complex needs such as LD, Autism and Dementia 	<ul style="list-style-type: none"> • Development programme being finalised with lead partners (by June 2026) • Ongoing engagement with stakeholders

Commissioning pipeline activity

Service Area	Timescale	Procurement route	Capacity and demand/projections OR Commissioning Strategy	Detail and next steps
Care Technology Enabled Care	Procurement commenced during 2024-25, further market engagement took place December 2025	Open tender / National Framework	Ageing population projections, increasing home care packages and hours, a focus on strengths-based practice and enabling residents to live independently for as long as possible	A need to ensure that we remain on top of latest developments and ensuring a VFM approach is in place from available procurement frameworks
Supported Living	Framework in place from 2025/26	Greater Manchester Framework	Capacity and demand – accommodation wise, we do not have enough specialist accommodation and care services to provide support to people in the borough. Once additional accommodation is confirmed (through development activity and/or assessment of opportunities, the care and support services will be commissioned through the GM framework.	Additional property required – development link
Day Services Broker framework	Procurement to commence during 2026/27	Approved Provider List – to be scoped	Oversight of the market ensuring equity of access is achieved, consistent contractual monitoring and management	Direct Payment portfolio rationalisation
CAH/Extra Care retender as contract ends March 2026	Procurement commenced Autumn 2025	CAH and ECH Framework – Oldham led	Ageing population projections are likely to result in an increase of home care packages Need to ensure commissioned provision is able to meet the needs of Oldham's demographics via a Cluster/District approach	CAH and ECH tender moderation due to conclude by April 2026 development link (ECH)
Specialist Residential and Nursing Care Home provision	Ongoing engagement	Engagement with existing market and new providers	A recent reduction in care home beds though the closure of homes in the last 24 months. Ageing population projections indicate the need for more care home provision. Consideration of an increase in care homes applying a top up fees to their provision and correlation of the increase in out of are residential provision, to consider the in borough rates for specialist provision required to meet needs.	OTC developments Engage with providers to develop residential provision in Oldham or remodelling their current provision to address gaps in our current provision: Nursing <ul style="list-style-type: none"> • Dementia Nursing • Dementia Residential • Bariatric • Male only units development link

Feedback from our CQC inspection

- *The local authority was shaping and developing the market, so people had access to a range of local support options to meet their care and support needs. This was demonstrated through the ASC Commissioning Delivery Plan (2025-26), which identified gaps in care home and housing provision and outlined future extra care housing need.*
- *Leaders were using the ASC Commissioning Delivery Plan (2025-26) and market-shaping activities to improve in-borough provision of specialist housing with care. At the time of the CQC assessment, a project was underway to develop specialist housing provision to bring back into the area a number of people who had been receiving care and support outside the borough.*
- *In response to demographic intelligence, commissioning leaders and staff were also working towards developing culturally appropriate services which were informed by the needs of Oldham's diverse population.*
- *Together with a clear delivery plan and ongoing activity to repatriate people back into the area through housing with care developments, this indicated leaders were aware of the needs of the population and were using evidence-informed strategies to shape the care market accordingly.*

Summary and 'take aways'

- Links to the published suite of Adult Social Care Market Position Statement: [Adult Social Care Market Position Statement | Adult Social Care Market Position Statement | Oldham Council](#)
- Co-production is key to the way Adult Social Care works: engagement with providers, partners and residents.
- Ongoing monitoring of market stability, quality and capacity is a legislative duty.
- Regular updates through our established governance routes.

Appendix 1 – Skills for Care Workforce Dataset: Oldham Recruitment and Retention

Recruitment and retention, 2024/25 Download PowerPoint

You are looking at data for **Oldham**

Use the drop down menus to filter the information shown on this dashboard

Select a sector: Independent | Select a service: All services | Select a job role: All job roles | Number of filled posts: 5,800

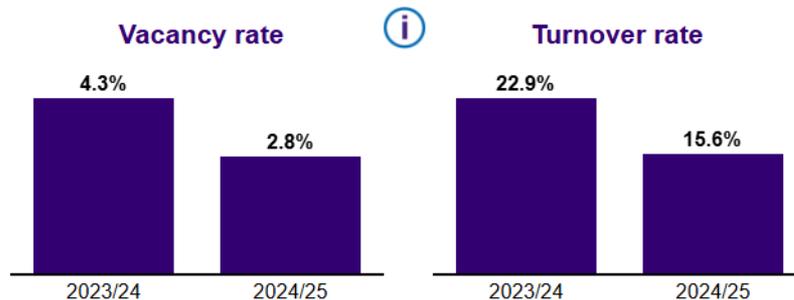
This page shows data from the **independent (IND) sector**

the turnover rate was **15.6%**
or (800 leavers)

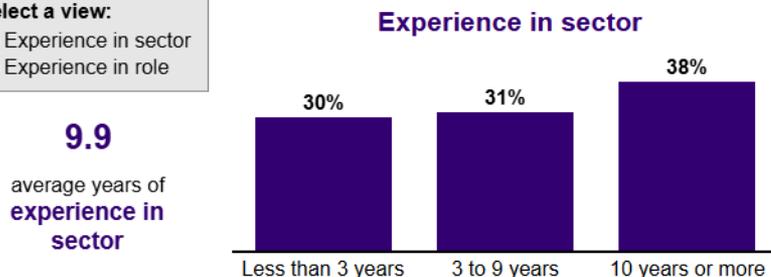
the vacancy rate was **2.8%**
or (150 vacant posts)

the average number of sickness days was **5.9**

of recruitment is from within adult social care



Select a view:
 Experience in sector
 Experience in role



Skills for Care estimates that the staff turnover rate in Oldham was 15.7%, which was lower than the region average of 23.5% and lower than England at 23.7%.

Not all turnover results in workers leaving the sector, many starters are recruited from within the adult social care sector, therefore although employers need to recruit to these posts, the sector retains their skills and experience.

It is estimated that the vacancy rate in Oldham was 2.8%, which was lower than the regional average of 6.5% and lower than England at 6.8%.

Appendix 2 – Market risk and oversight of commissioned provision

ASC Commissioning & Quality Dashboard: Care Homes

Care Home Details



Key Facts

Care Homes in Oldham
46

Care Homes CQC Rated
41

Good or Outstanding
76.1%

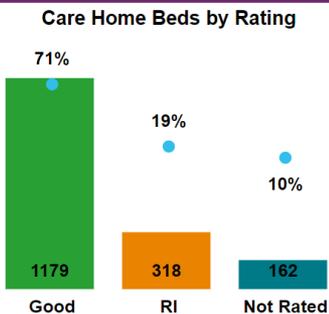
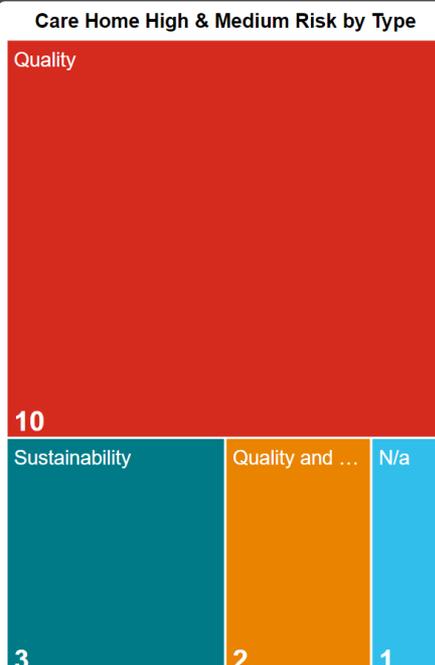
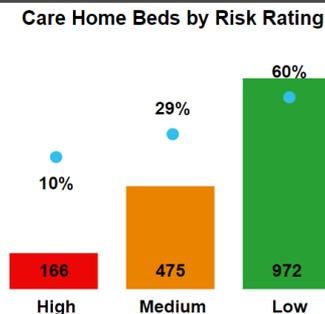
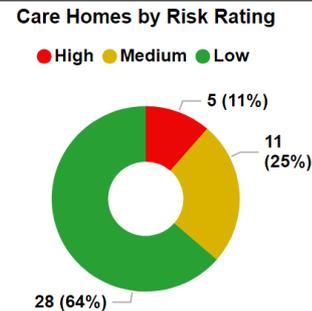
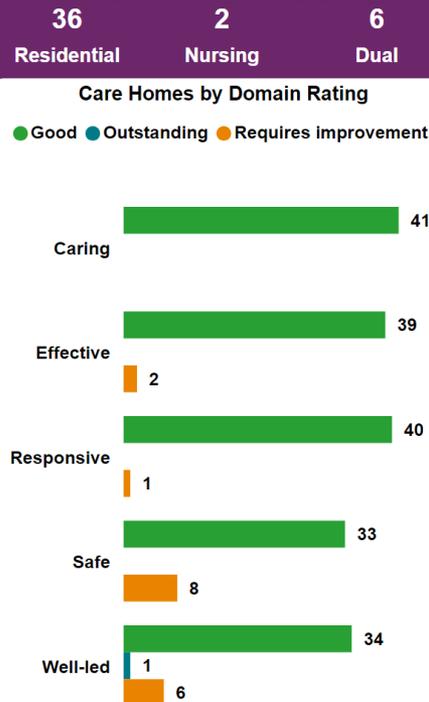
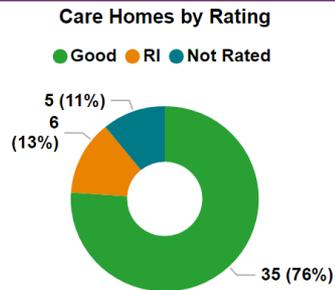
Total Beds in Oldham
1659

Providers of Oldham Care Homes
37

Registered Managers in Oldham Care Homes
41

Latest Assessed Home by CQC
Oldham House

Assessment Date by CQC
06/01/26



Appendix 2 – Market risk and oversight of commissioned provision

ASC Commissioning & Quality Dashboard: Homecare

Homecare Details



Key Facts

Homecare Providers in Oldham
61

Homecare Providers CQC Rated
35

Good or Outstanding Providers
49%

Latest Assessed in Oldham
SCS Homecar...

Framework Providers
12

% Framework Outstanding or Good
92%

Latest Assessed Framework Provider
Care Quality Serv...

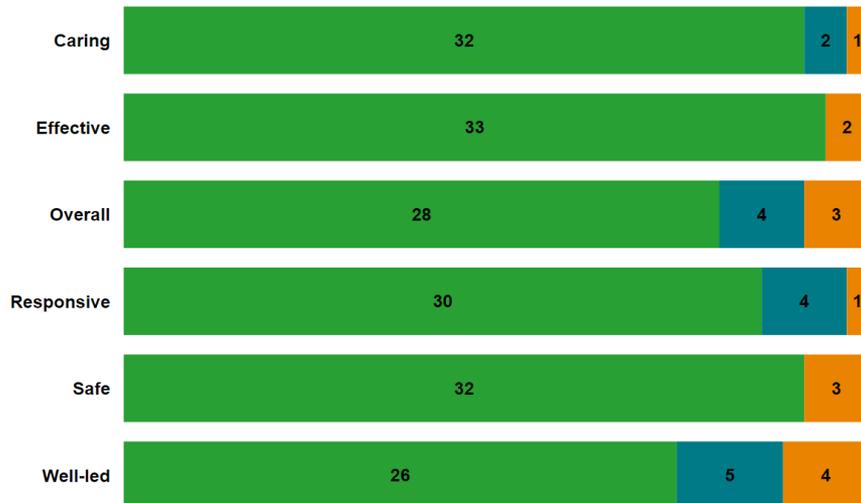
Latest Assessed Framework Provider
22/12/25

Local Authorities
4



Homecare Providers by Domain Rating

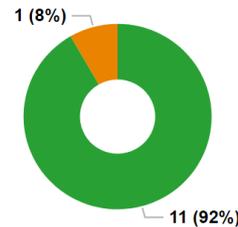
● Good ● Outstanding ● Requires improvement



Working for a cooperative borough

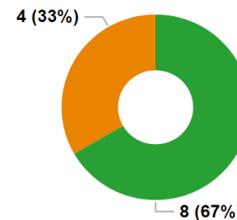
% Framework Outstanding or Good

● Good ● Requires improvement



% Framework by Risk Rating

● Low ● Medium



Homecare High & Medium Risk by Type



Appendix 2 – Market risk and oversight of commissioned provision

ASC Commissioning & Quality Dashboard: Supported Living

[Supported Living Details](#)



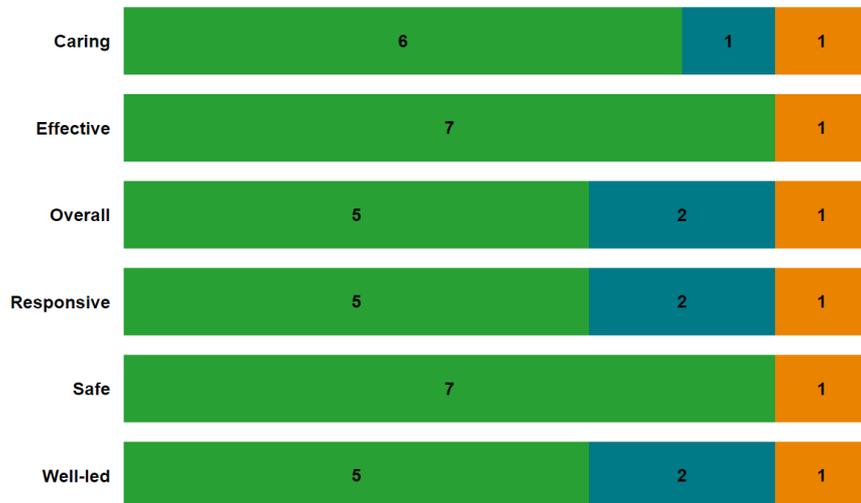
Key Facts

Supported Living Providers in Oldham 19	Supported Living Providers CQC Rated 8	Good or Outstanding Providers 26%	Latest Assessed BlueCross Life Care	Framework Providers 7	% Framework Outstanding or Good 86%	Latest Assessed Framework Provider Future Directions ...	Latest Assessed Framework Provider 11/1/20	Local Authorities 5
---	--	---	---	---------------------------------	---	--	--	-------------------------------



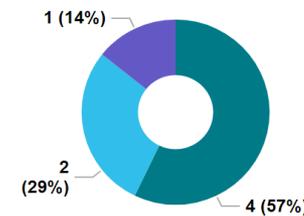
Supported Living Providers by Domain Rating

● Good ● Outstanding ● Requires improvement



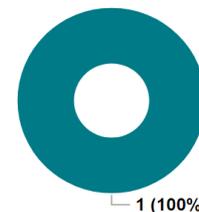
% Framework Outstanding or Good

● Good ● Outstanding ● Not Rated



% Framework by Risk Rating

● Low



Supported Living High & Medium Risk by Type

N/a

1

Capacity and Demand

What the Market Position Statement is telling us about the capacity and demand pressures

Residential and Nursing Care: in-borough

- Oldham currently has 32 residential care homes, 7 are dual registered (nursing and residential) and 1 is nursing only.
- The borough's current provision is 1,600 beds operating on average 72 beds being vacant (95.5% capacity)
- Based on current occupancy and population projections the Oldham care home population is predicted to increase from 1,708 beds in 2023 to 2,404 beds by 2040, at an average growth of 40 beds per year.
- Moreover, based on the number of Oldham Council funded beds compared to the wider market results, indications suggest there is a need for an additional 20 Council funded beds per year.
- Therefore, there is currently insufficient capacity in the market to support this level of growth. ONS data estimates 24.6% of care home beds in Oldham are self-funders.
- The number of care home beds in Oldham has reduced by almost 200 beds since 2021. This has had a particular impact upon nursing provision with two large dual registered nursing homes closing in the last two years alone.
- At the same time, we are seeing increased acuity of needs for people requiring permanent nursing and residential care.
- Oldham has experienced an increase in residential and nursing homes introducing charged third party top up fees which are over and above the local authority set rates. Currently, over 59% of the residential market now apply these additional costs. It should be noted that this limits the availability and choice for Oldham residents.

Residential and Nursing Care: out of borough

- Based on detailed analysis of out of borough provision in October 2024 we have a better understanding of the gaps in the market
- At that time there were 193 out of borough placements (at the time of reporting we have 160 out of area placements)
- The majority of out of borough provision was within Greater Manchester (75%) of which 61% was in localities who share a boundary with Oldham.
- The main reason noted for out of borough provision was due to a lack of suitable in borough provision, which was stated in 72% of cases
- The main two primary support reasons for out of borough placements were:
 - Personal Care Support 40%
 - Mental Health Support 37%
- Key areas which are of particular challenge are related to a variety of mental health conditions and the ability of providers to support these, particularly in relation to behaviours that challenge
- Increased acuity at hospital discharge is also a factor in relation to the complexity of placements now required, often requiring nursing care – though this may not be a longer-term need.
- Anecdotally we are also aware of the need for Bariatric provision and male only units provide challenges within borough

Residential and Nursing Care: opportunities

- Oldham is more reliant on out of borough provision than other authorities across the North West, both for residential and nursing care
- We need the care home market in Oldham to grow to meet the local growth projections and areas we're seeing demand (with reference to OOB placements)
- However, there is a requirement for more diverse types of care homes within the borough particularly around mental health and the ability to manage complexity this is both for nursing and residential provision

PLAN

- Oldham Total Care
- Develop existing market to upscale and diversify existing provision
- Consult and influence current and future developments

Extra Care Housing

- Considered as a step before residential care
- Oldham currently has 255 units across 6 sites often operating with minimal voids
- MioCare sole provider in the borough (tendered opportunity)
- Of the six Extra Care Housing sites, only one of them was purpose built (in 2015), with the remaining five being converted from previous Sheltered Housing stock, which do not lend themselves to providing support to people with additional needs – such as physical support. This is having an impact on more placements than necessary in residential settings.
- Oldham is committed to growing this model, and with the increasing demand on residential services it is recognised that Extra Care Housing has a role to play in enabling people's independence and providing support to people ahead of them requiring 24:7 support in residential or nursing provision.
- It is considered Oldham residents would benefit from an additional Extra Care Housing site in the borough, to accommodate between 40-60 people and scoping work is taking place with housing and partners. A business case is being prepared to address this area of care and support moving forward.

PLAN

- Review care contract and service specification, liaising with the PFI contract with Housing 21's service delivery model, in preparation for re-tendering in 2025/26
- Consider options for 24 hour care ECH models (where demand is required)
- Continue work with strategic housing colleagues to scope development plan

Specialist housing with support services

- Current in-borough commissioned capacity is not enough to meet the demand for services.
- ASC has seen an increase in the demand for supported living services in Oldham since the pandemic.
- Work is underway to map those people who are not suitable for the current supported living voids available. Although the work has yet to be completed the following cohorts have already been identified:
 - Cohort 1: Single Occupancy (Separate Property)
 - Cohort 2: Additional Levels of Support
 - Cohort 3: Apartment Supported Living with Sensory /Communication Requirements
 - Cohort 4: Complex Plus with possibility of DOLs
 - Cohort 5: Supported Living with Complex Medical
 - Cohort 6: Supported Living with Young People
 - Cohort 7: Supported Living with Trauma-Informed Care
 - Cohort 8: Supported Living for Muslim Women

PLAN:

- Business case in development, working with strategic housing to identify properties for redevelopment
- CBA to be completed early 2025

Reablement

- The reablement pathway is successful with an average of 70% of residents returning to their baseline.
- However, the number of residents who receive a reablement offer is limited.
- Whilst ASC reablement services are non-chargeable for up to 6 weeks, it is an area of prevention, aiming to promote wellbeing, helping to reduce unnecessary hospital admissions, re-admissions and delayed discharges from hospital.
- Notably, a Return-on-Investment study commissioned by Public Health England (January 2020) has estimated the *societal return on investment for reablement services is for every £1 invested with achieve £4.71* (with £1.15 solely from an NHS and social care perspective). [The older adults' NHS and social care return on investment tool - Final report \(publishing.service.gov.uk\)](#)
- Oldham commissions MioCare to provides both bed-based (Medlock) and community-based (in people's own homes) reablement services across the borough.
- In 2023/24 a total of £1,679m was spent on reablement in the community in the borough (an average of 90 people supported per month, at an average cost of £1,555).
- In 2023/24 a total of £1,913m was spent on residential reablement (an average of 30 people supported per month, at an average cost of £5,300).
- Through the review of Reablement Services in Oldham, there is a focus on how we can further enable more people to receive reablement services from community referrals.

PLAN

- Continue work on delivery model options
- Embed reablement first model across the HSC workforce
- Consider CBA of additional therapists, as well as OTs at point of assessment and investment strategy

Managing Provider Risk

- Monthly Operational and Strategic Provider Risk meetings take place
- Multi-disciplinary intelligence sharing across Adult Social Care, Health, Care Quality Commission
- Increased oversight and improvement plans in place where providers flagged as High or Medium risk
- Following slides show current risk position in relation to framework provision