



Healthcare Horizons

Bijeenkomst 'samen veranderen' – Health Contracting
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Our Global Healthcare practice



70+

Country practices

200+

Clinicians globally

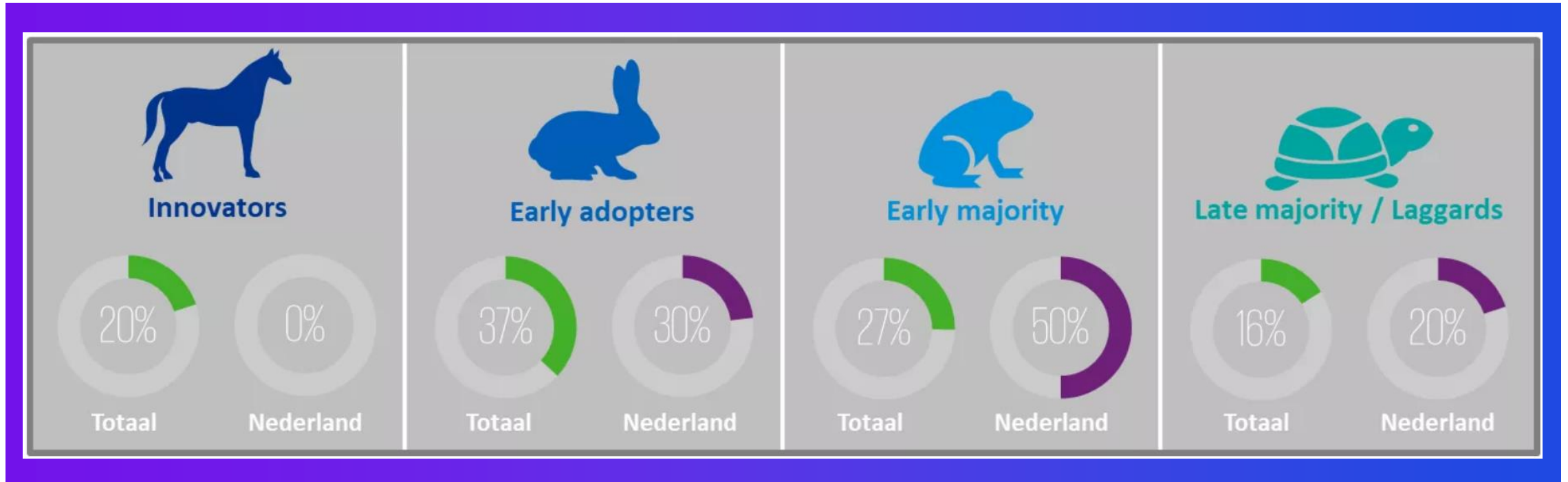
5000+

Global healthcare workforce

**WORLD
ECONOMIC
FORUM**

**Partnership on Health System
Sustainability and Resilience**

Pre-IZA *"Innovatie is de achilleshiel van de zorg"*



Source: KPMG Healthcare CEO Future Pulse

Our survey of 200 CEOs shows that healthcare leaders accelerated transformation in response to COVID

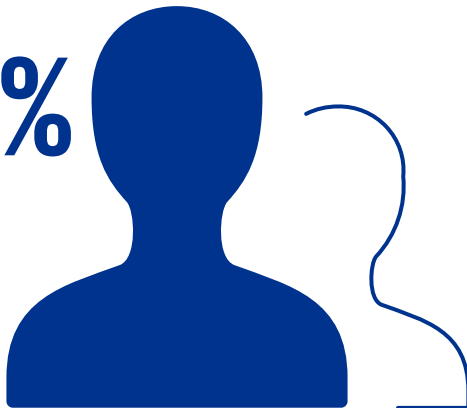
Had transformation efforts underway before the COVID-19 pandemic



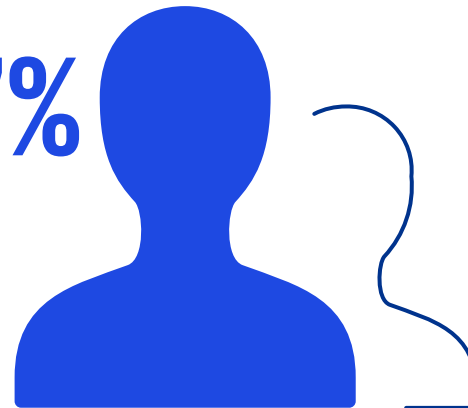
Say COVID-19 “**significantly accelerated**” their transformation efforts

Believe that within the next three years **all aspects of care delivery will be transformed**

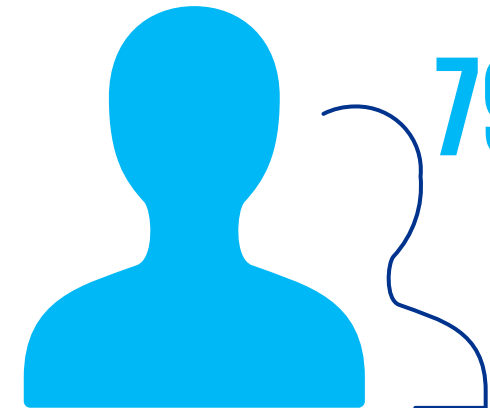
62%



97%



79%

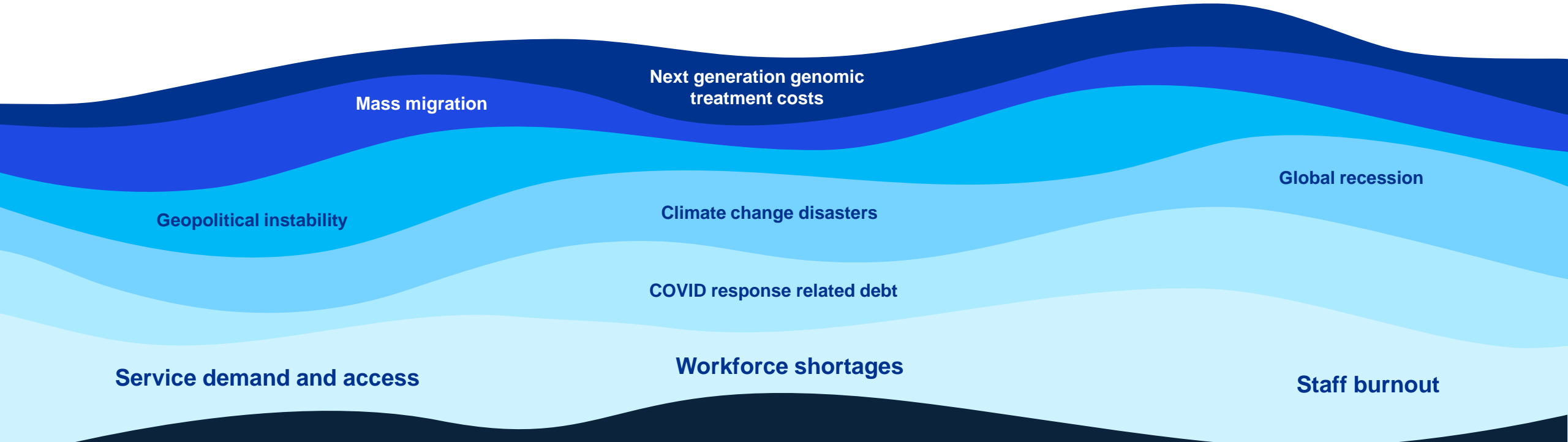


Source: KPMG Healthcare CEO Future Pulse

Healthcare's perfect storm



COVID-19 may be just the beginning of a wider crisis in healthcare



Pre-pandemic undercurrents:



Aging and growing populations



Increased non-communicable disease



Workforce supply and wellbeing



Outdated technology



Economic inequality



Increased social fragmentation



Increased mental health burden

Threat or thrive?



Navigating healthcare transformation: Three possible routes



Impoverished

Attempt to return to pre-pandemic “business as usual”

Reliance upon hospital-centric models of care and hiring new staff



Alienated

Overreliance on digital and technology

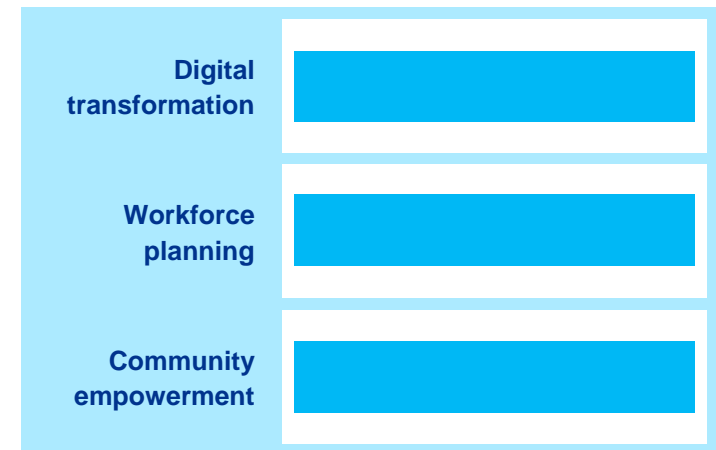
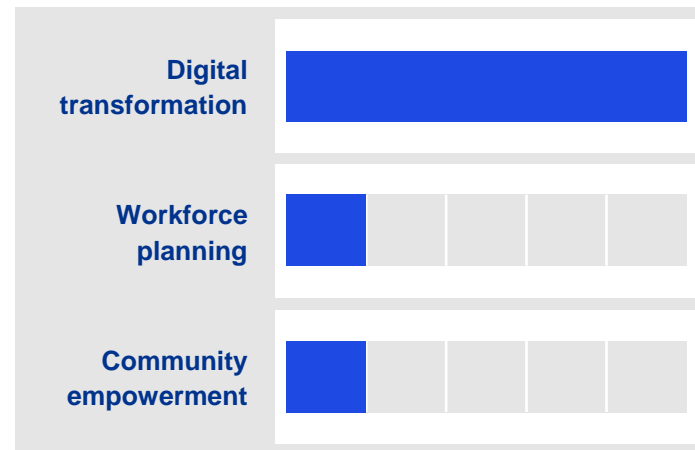
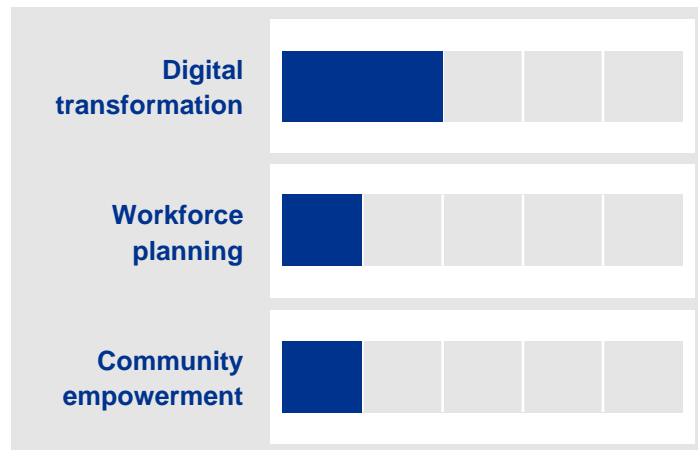
Limited workforce and community engagement and integration

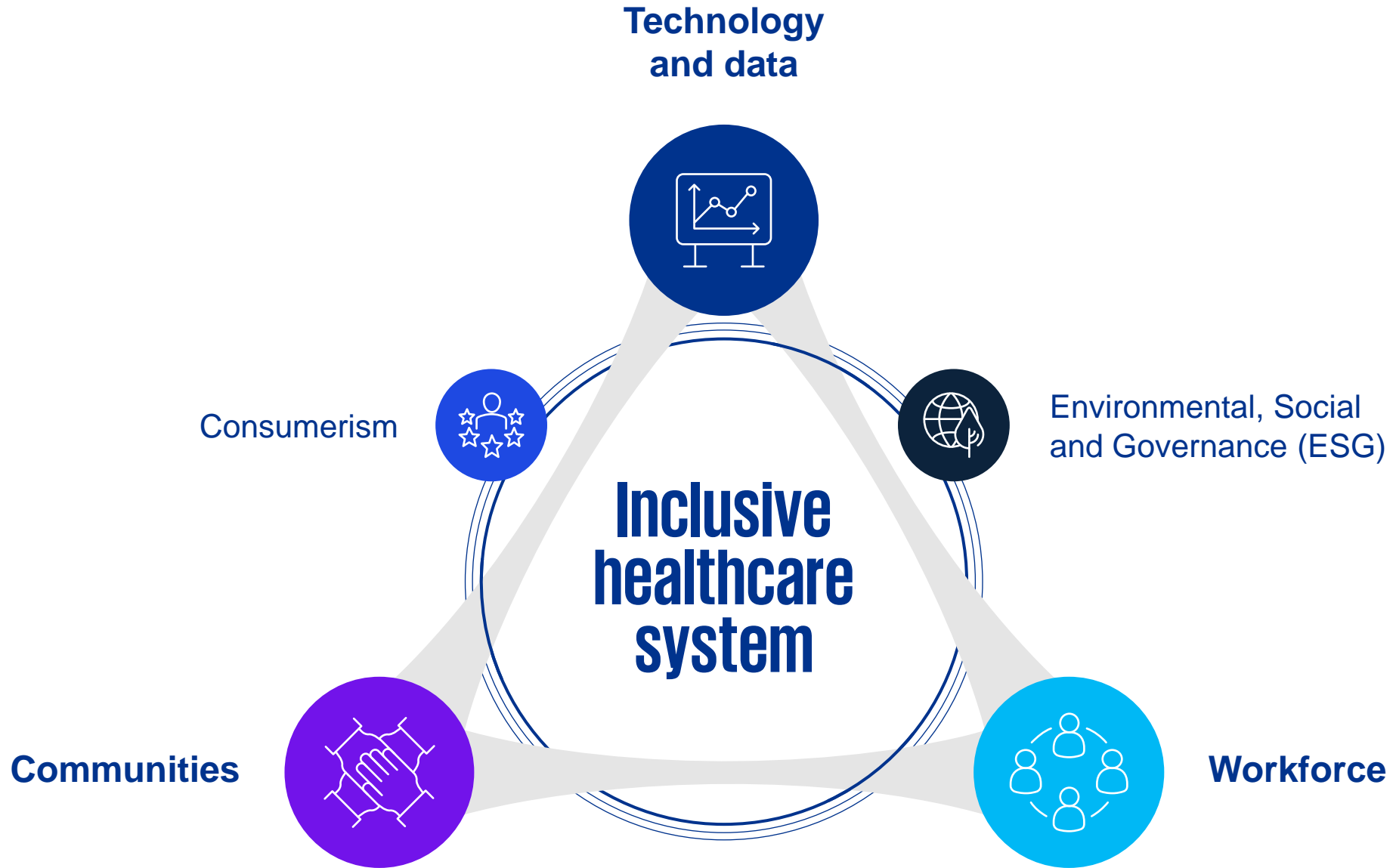


Inclusive

Leverages workforces, communities and technology

Technology used as an enabler to free up workforce capacity, empower individuals and communities

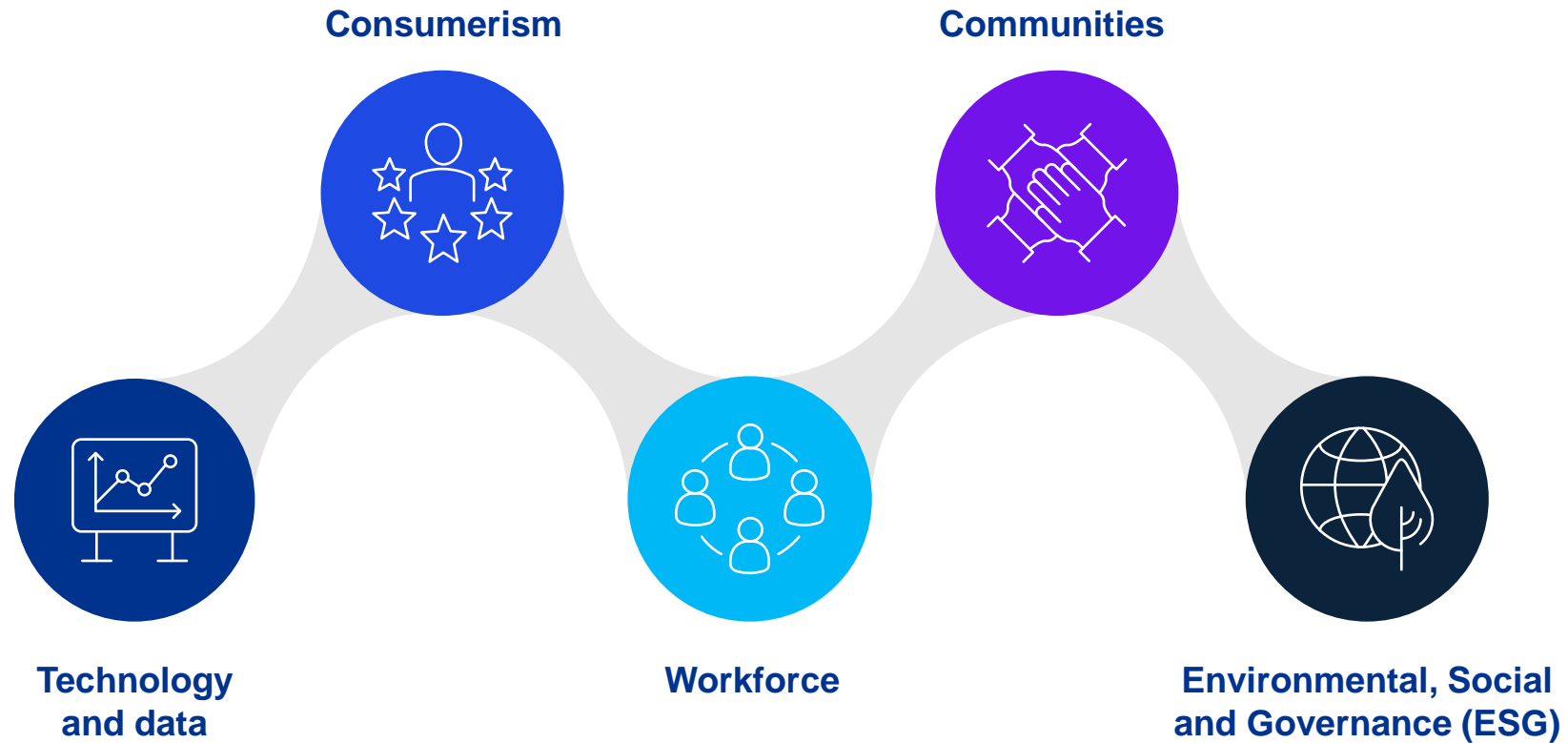




Future trends and predictions



A decade of inclusive change: A radical shift is on the horizon



Data and technology



Future trend highlight

Digital technology to transform experiences, ecosystems and clinical operations



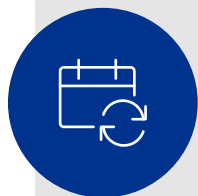
Predicted impact on healthcare

Data decentralization through Web 3.0

Care delivery via the Metaverse

AI and cognitive technologies to liberate workloads

Data and technology



Future trend highlight

Digital technology to transform experiences, ecosystems and clinical operations



Predicted impact on healthcare

Data decentralization through Web 3.0

Care delivery via the Metaverse

AI and cognitive technologies to liberate workloads

Signal of change



Primary Care Centre in Stockholm faced a number of challenges



Waiting lists for GP appointments hit 4-6 weeks



Using data and analytics to solve challenges



Digital platform implemented, triaging patients via nurses

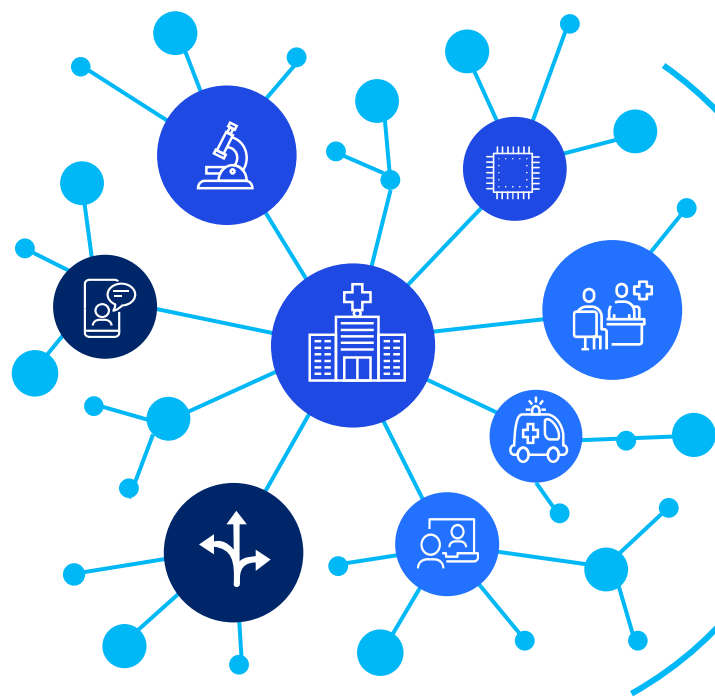


3-4 nurses treated 100+ patients per day



33% more patients treated per clinical hour

Breaking siloes to provide integrated care: the Finnish model



A collaborative, nationwide mission to integrate

- Translation of academic insights to blended care models.
- Collaboration of academic hospitals serving all of Finland.

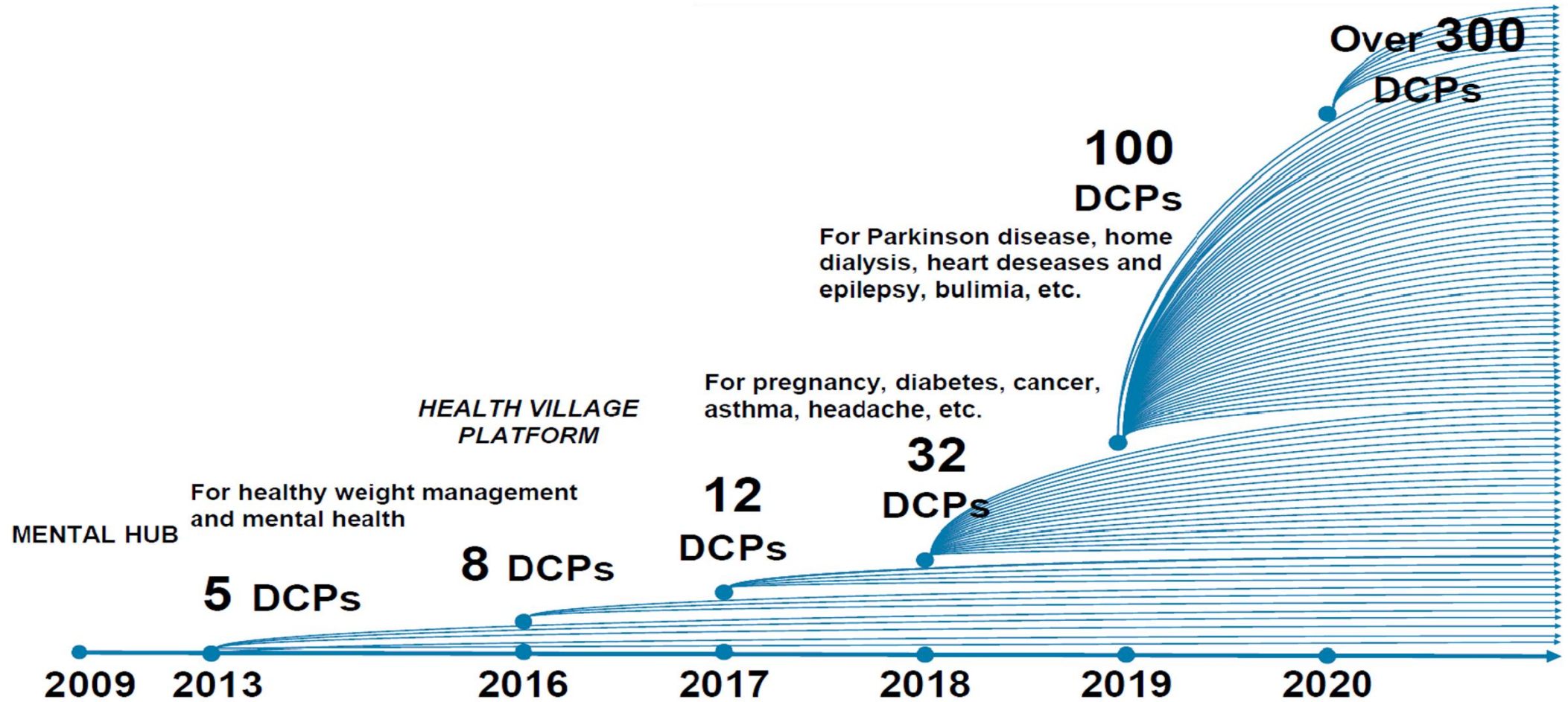
Virtual hospital (Health Village)

- Combination of physical medical care and digital healthcare.
- Expanded to over 300 care pathways, including depression, Parkinson's and obesity/bariatric surgery.

Components

- **Public:** websites/portals as the “digital front door”.
- **Patient:** virtual and physical healthcare combined.
- **Professional:** access to tools (e.g. e-consultations, e-treatments and information about patient groups and diseases).

Digital care has already been scaled up in Helsinki



Workforce



Future trend highlight

Workforces to be digitally enabled and micro-credentialed



Predicted impact on healthcare

Healthcare jobs to move from 'roles' to 'skills'

Artificial intelligence to liberate healthcare workers from routine tasks

System vs organizational employment

Signal of change

Leading hospital in Israel



Need to improve patient experiences and reduce administrative burden on staff



Digital oncology nurse service



50%↑ Patient satisfaction



78%↑ Staff satisfaction



27%↓ Staff workloads

Addressing workforce challenges



**From
rostering to
strategic
planning**



**Artificial
intelligence
for routine
tasks**



**Micro
credentials
and
platforms**



**ICS-level
employment**

Community empowerment



Future trend highlight

Communities to be activated in addressing complex societal challenges



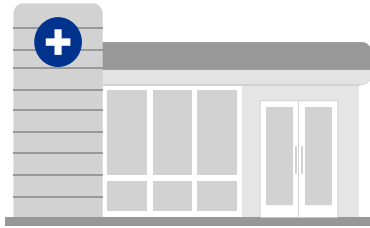
Predicted impact on healthcare

Community empowerment and responsibility for population health

Data driven community health and care

Expanded and totally new role for primary healthcare

Signal of change



**Aboriginal Community
Controlled Health
Organisations in Australia**



**Comprehensive and culturally
appropriate healthcare services**

Sources:
National Aboriginal Community Controlled Health Organisation
Australian Institute of Health and Welfare
The Medical Journal of Australia



**Community
empowerment**



**Initiated and operated by
local Aboriginal
communities**



**16-20% decrease
in Aboriginal and Torres Strait
Islander mortality rates
over the last two decades**

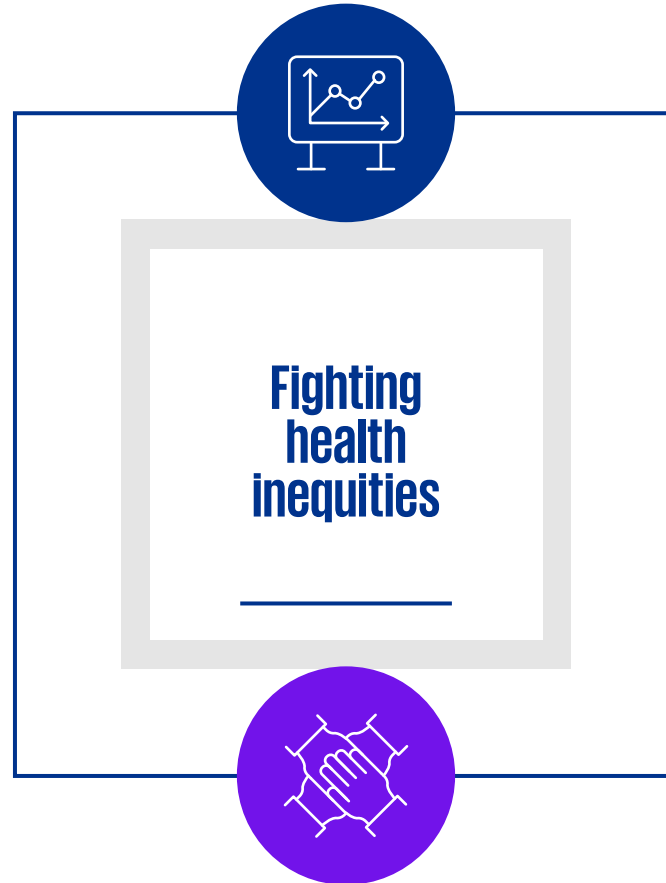
Signal of change



Disproportionate COVID-19 impact on underserved communities in the United States



Morehouse School of Medicine and the National COVID-19 Resiliency Network

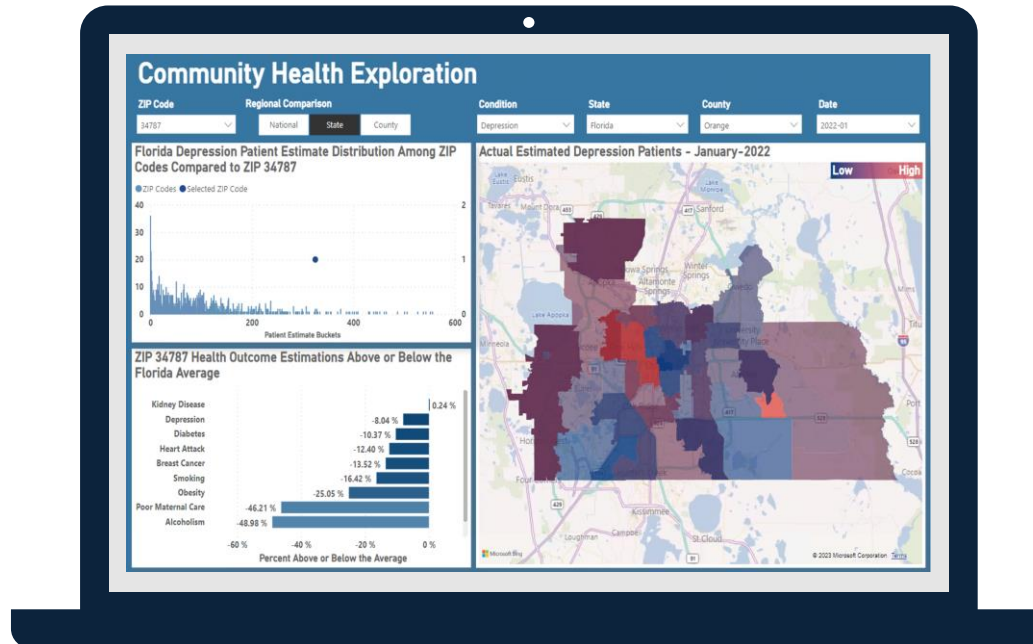


Harvesting insights from publicly available data sources

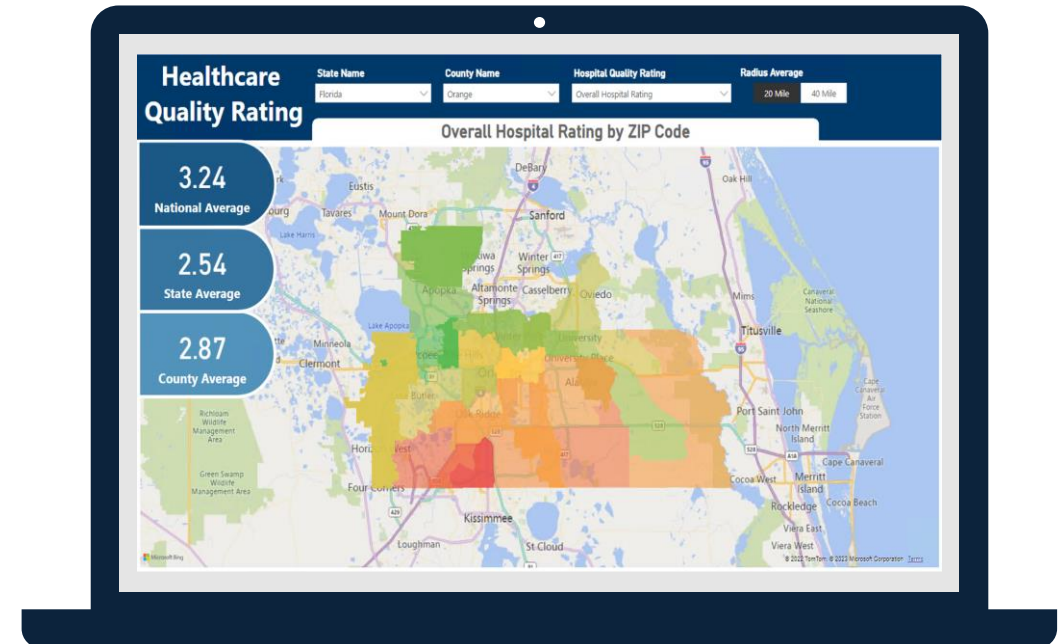


Partnering with community and other groups to provide culturally and linguistically appropriate interventions

The HE platform provides dynamic community-level health analysis



Quality of care, availability of care, and ease of access to care can be quickly ascertained



Geospatial analysis means that communities can be compared to regional and national benchmarks, whilst pinpointing of disease 'hot spots' enables stakeholders to 'locally' evaluate potential causal factors

Consumerism



Future trend highlight

Seamless, personalized, customer-centric experiences to increase along with digital platform-based consumption



Predicted impact on healthcare

New entrants to take up a substantial part of the healthcare market

Globalized platform based healthcare delivery

App and VR/AR-based prescriptions to equal drug prescriptions

Environmental, Social and Governance (ESG)



Future trend highlight

Integrity-based economy to emerge



Predicted impact on healthcare

ESG accountability and transparency demanded by citizens

Financial systems to exert greater pressure over ESG

Organizations to halve carbon emissions and have net zero plans

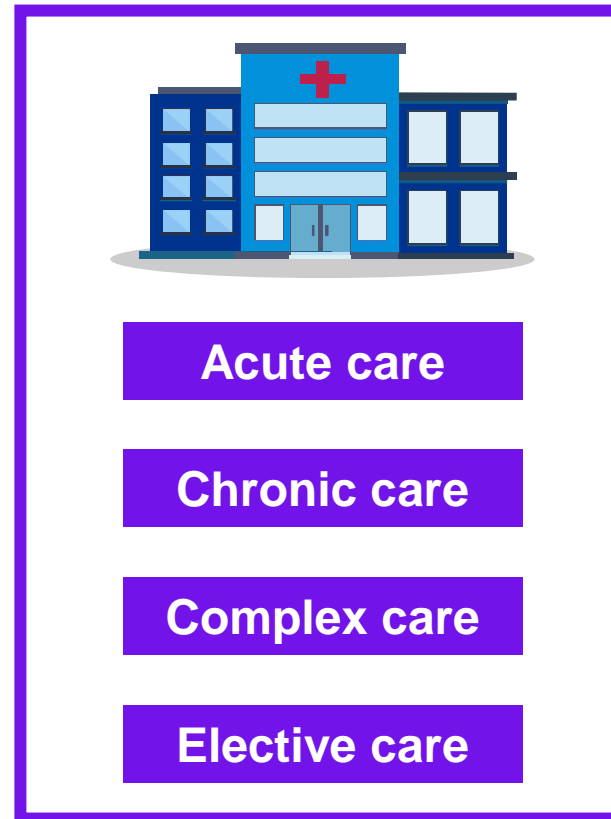
Future healthcare ecosystems



Integrated health ecosystems built around the patient give providers their role to play

Health systems will re-orient themselves less around the hospital, and more into the community where the patient has greater access and providers can focus on their core competencies

Hospitals have traditionally been “all things to all people”...



...but in the future integrated care model, systems “share the work”



Integrated care center



Elective treatment center

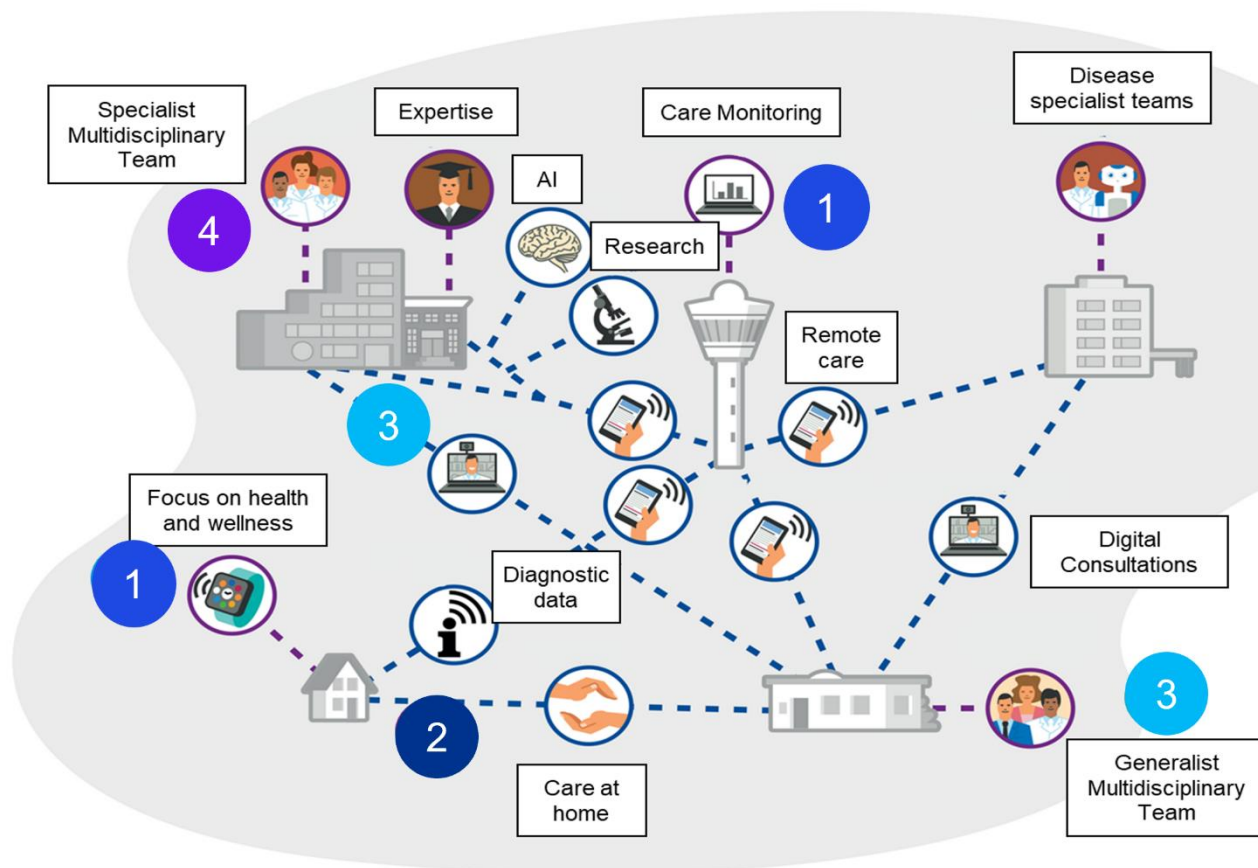


Complex intervention center



Expert center

Moving towards a new ecosystem for healthcare



Healthcare is moving towards a new ecosystem in which the 'where' and 'how' of healthcare delivery is fundamentally different. Actionable insights, powered by big data and AI, will enable systems to shift care out of secondary care and into primary care and the community.

- 1) Prevention and detection
- 2) First contact through digital channels
- 3) Easily accessible 'integrated generalist team'
- 4) Specialist care through a blended care model

What do you need to consider?



Digital

Healthcare will move at high speed into the digital era. Large providers will need to play a leading role, or risk being left behind.

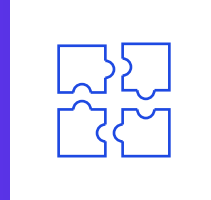
Who is taking the lead on digitization in your partnerships?



Workforce

Given the lack of workforce in the Netherlands, bold solutions are needed to ensure the sustainability of healthcare.

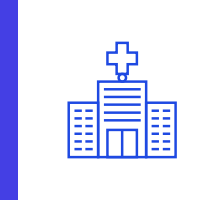
How will to retain and recruit effectively?



Shifting left

Prevention and early intervention is fundamental to keeping healthcare affordable and equitable as our population ages.

Are you adopting to this new ecosystem?



Integrated ecosystems

Healthcare systems will need to design and implement new ecosystems, where functions and contracts are aligned.

What is the ecosystem and subsequent contracting model for you?



Leadership

In order to ensure sustainability, bold decisions and bold transformation will be needed.

Is your organisation thinking bold enough?

What do you need to consider?



Digital

Healthcare will move at high speed into the digital era. Large providers will need to play a leading role, or risk being left behind.

Who is taking the lead on digitization in your partnerships?

De Wegiz per 1 juli '23 en het toewerken naar een EHDS zijn een geweldige stimulans! Hoe versnellen we het volle potentieel van uitwisseling in de regio?



Workforce

Given the lack of workforce in the Netherlands, bold solutions are needed to ensure sustainability of healthcare.

How will to retain and recruit effectively?

Inzet ZZP-ers, CAO-loonstijging en beperkt benutten microcredentials in ziekenhuizen maken uitdagingen hier nog groter. 'Oude' oplossingen met arbeidskrachten uit buitenland leiden af.



Shifting left

Prevention and early intervention is fundamental to keeping healthcare affordable and equitable as our population ages.

Are you adopting to this new ecosystem?

Niet eerder zoveel aandacht voor een integrale en preventieve kijk geweest dan dan met JZOJP, IZA, WoZo en GALA. Wordt de hefboom echter voldoende kracht (euro's) benut?



Integrated ecosystems

Healthcare systems will need to design and implement new ecosystems, where functions and contracts are aligned.

What is the ecosystem and subsequent contracting model for you?

IZA is nog vers en tegelijk al betwist. De pijn bij concentratie vraagstukken nemen we lastig. Blijvend beroep op commitment partijen nodig. Waar laten we korte termijnbeleid en Artikel 13 onnodig hinderen?



Leadership

In order to ensure sustainability, bold decisions and bold transformation will be needed.

Is your organisation thinking bold enough?

Uitdagen en continu verbeteren zijn ook in een samenwerkingsmodel drijvende krachten. Organisatiebelangen staan vaak in de weg. Passende zorg moet ruim baan krijgen!

Q&A



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