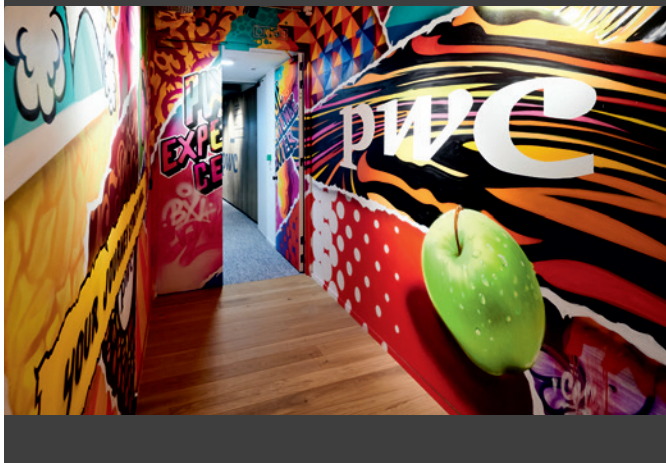


Reimagine the future of healthcare: delivering greater value to patients

A summary of our panel debate

September 2022



Bringing all stakeholders together

On 20 September 2022, PwC hosted a ground-breaking event that saw all stakeholders in the healthcare sector come together to discuss their ideas of what their industry could and should look like in the years to come – and how they could best collectively achieve their ambitions. This is the first time in Belgium that leaders of government, pharma, biotech, hospitals and other key stakeholders sat together to consider the future in such a holistic way. The thoughts in this report represent the collective discussion of ideas and trends.

We'll be holding this event annually to enable ongoing discussion, collaboration and co-creation to the benefits of patients and citizens.

Key highlights

Alexander de Croo, Belgian Prime Minister

"The Belgian Federal Government is committed to making Belgium a real health and biotech valley in which biopharmaceutical research, development and production in our country are stimulated."

Thomas Solbach, Partner and Future of Health expert, Strategy& Germany / PwC

"The future of healthcare will be people driven, not patient driven, because we want to stay healthy, we don't want to get sick. It'll also be more personalised, digital and integrated."

Benoit Collin, Managing Director, INAMI/RIZIV

"Massive investment should translate into outcomes for the patient and the health and insurance system, while providing a reasonable return to healthcare providers and manufacturers."

Paul d'Otreppe, President, Belgian Association of Hospital's Managers (BVZD/ABDH)

"We shouldn't be revising the system of yesterday, we should be designing the system that's ready to meet the future."

Caroline Ven, Chief Executive Officer, Pharma.be

"It's important to look not just at the cost of medicine, but what it brings to the healthcare system and socio-economic framework, in terms of helping people return to work, etc."

Sylvie Ponchaut, Managing Director, Biowin

"The Belgian research and development model is characterised by strong interaction between academia and industry. We increasingly also have non-traditional partners involved in our innovation system. This culture of collaboration is very important."

Wouter Piepers, Chief Executive Officer, Flanders Bio

"Belgium has a strong history of innovation in life sciences and biotech and today we have a strong and successful ecosystem. We're also spoiled in Belgium with many role models that are important for young entrepreneurs and scientists."

Elena Bonfiglioli, Global General Manager Healthcare Industry, Microsoft

"If we want to take stock of the precision health era we're now entering in a predictive, personalised and preventative way, we need to be able to capture the multi-modality of data."



Our panellists



Wouter Piepers
Chief Executive Officer
Flanders Bio

Thomas Solbach
Partner and Future
of Health Expert
Strategy& Germany



Benoit Collin
Managing Director
INAMI/RIZIV

Paul d'Otreppe
President
BVZD/ABDH



Caroline Ven
Chief Executive Officer
Pharma.be

Sylvie Ponchaut
Managing Director
Biowin



Elena Bonfiglioli
Global General Manager
Healthcare Industry
Microsoft





Patient needs

What will the patient of tomorrow look like?

Greater focus on prevention

All stakeholders have the patient at the heart of their thinking and actions, striving to help people stay healthy and diagnose illnesses as early as possible for better outcomes. Tomorrow's patient will be very different to that of today. They'll be more impatient, with different demands and seeking more information. Personalised medicine will be more prolific. People will play a more active role in their healthcare, will be more in the driving seat of their care, preferably (for them) with solutions that don't require a hospital stay. As a result, we can expect to see a reduction in the number of hospital establishments in Belgium over the coming five years, or so, as the current infrastructure adapts to changing people needs.

Prevention must become a priority with investment in preventative care and lifestyle, via education, etc. which'll become more important than investment in care.

Data will be key

More personalised medicine will require that people are willing to share their data to a greater extent than they are today. This will only happen if the purpose for which data will be used is fully clarified and there are clear safeguards for privacy in place. Overall, people have a willingness to help and to save lives. Patients themselves will also seek more information about data to have confidence in solutions.





Innovation

What impact will the acceleration of drug development have?

Faster development lifecycle for drugs

With an ever-expanding understanding of disease biology and increasing set of data, the development cycle for new cures will be substantially shorter. Speed of development is becoming more and more of a requirement, calling on new technologies, and is already a hot topic in clinical and pre-clinical development as healthcare specialists look to provide faster solutions for patients and to optimise budgets in the development process. Investors are already putting innovation forward as a requirement so it's no longer an option - innovation is a "must." Shorter development lifecycles don't necessarily mean lower costs.

The need for trust

The acceleration of development cycles isn't just about hard facts, the "softer" elements, like trust, surrounding the introduction of new solutions also needs to be taken into account. End users have to be able to trust that although a drug's developed more quickly, it still has the expected level of quality and safety. This is as true for the development of drugs as new methodologies. For example, can you trust a diagnosis made by a machine? There also needs to be trust in how data will be used. Trust will be crucial in the future for all stakeholders.

The need for a tangible approach

Artificial intelligence (AI), deep learning and access to data will open new opportunities to pharmaceutical innovators and caregivers in hospitals. To extract the potential of these technologies, Belgium urgently needs to develop a clear action plan with practical action points in the sector. Belgium's behind its neighbours in terms of real-world data reuse. We need investment from the government and an action plan to be sure we can extract all the potential of data, AI and deep learning.

Why stop data at the border?

Disease knows no border, but there are boundaries when it comes to data. Today, privacy enhancing solutions exist that allow for the steward of data and models in enclaves where there's traceability. So there's an opportunity to create trusted research environments that go across borders. There's a need to stop thinking that all data needs to be in one great lake; there are GDPR (General Data Protection Regulation)-approved solutions for enclaves where models and data don't touch. As Europe moves toward the European Health Data Space what role does Belgium want to play? Can this country become a clinical trial trusted research hub that's privacy enhanced with tight controls over data? There are growing opportunities for hospitals and pharma to collaborate, with clear governance in place.





Collaboration

How can there be meaningful data exchange and collaboration across stakeholders to bring real patient value?

Trust is the cornerstone of cooperation

Innovation happens at the intersection of different players who have something valuable to contribute, but there has to be trust. To bring pharma together with biotech, technology companies, hospitals, etc. you need to build trust.

Granting open access to data

If data's the "new gold", no one wants to share it; doctors may claim it as their data as it comes from their patients, hospitals may claim it's there as it's in their systems, etc. If you make all data part of one global system within Belgium, in an open system, you have a greater chance of improving efficiency. If a patient doesn't want to share their data, they should have to pay not to share it, so you reverse the current system, but it needs government approval. Once that's given, everything's in place already to be able to improve efficiency across the board. Explaining the purpose of what you're doing is as important as is having a regulatory framework in place to make it happen.

Pharma companies already adhere to a specific code of conduct that goes further than the basis set out by regulations with regards to data, which enables them to be a trusted player and build trust with other stakeholders.

New value pools

What are the pressing topics for the future?

Prevention must be a priority

It took a long time to realise that the sustainability of the planet was in danger. We need to wake up to the fact that simply handling expenses for cures isn't sustainable either. There's a business case for the shift to prevention. And a shift from the walls of a hospital to a distributed virtual hospital that starts in the home, technology enabled. Prevention works for many segments in society, in some it starts in school. With regards to healthcare, that means teaching healthy ways of eating, being mobile, exercising, etc. This takes the responsibility beyond the healthcare budget. Prevention should remain in the hands of healthcare providers, but enabled by other stakeholders.

Prevention's crucial to handle healthcare in sparsely populated areas that are hard for medical professionals to reach. There's no other option than prevention in these cases and for the future. Such a shift may be unpopular with citizens, change is always hard to accept, but that can't be a reason not to make the move. Acceptance requires clear communication, proof as to why the change must happen and convincing people why it's necessary.



Fast forward

PwC will be engaged in helping healthcare actors to:

- Put greater value on prevention and healthcare;
- Take a more “integrated approach” to the global health of the population;
- Bring all healthcare players with a specific focus together to reach a common patient goal;
- Drive patient centricity with regards to care and cures, taking into consideration patient stratification using information captured in data registers;
- Develop advanced therapy including products, tools and logistics – Belgium has all the ingredients to be able to lead in personalised medicine;
- Drive AI and deep learning to revolutionise pharmaceutical research hospital care and global healthcare;
- Guide individually powered “data activation” – putting data together in a mobile way for a common healthcare purpose/disease, enabling people to reinforce their healthcare.

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About PwC

At PwC, our purpose is to build trust in society and solve important problems. We're a network of firms in 155 countries with over 327,000 people who are committed to delivering quality in assurance, advisory and tax services. Find out more and tell us what matters to you by visiting us at www.pwc.com.