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19–21 June 2023 | QEII Centre, London



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This agenda is correct as of 19th June 2023 – for the latest topics, sessions, speakers and more, scan the QR code or visit: <https://events.healthcarebusinessinternational.com/agenda>



HBI 2023 Speakers

Speakers include the following – for a full list please visit the [website](#)

Thierry Chiche **CEO, Elsan**

Jérôme Thill **CEO, Cerba Healthcare**

Peter Wharton-Hood **Group CEO, Life Healthcare**

Dr Jonathan Broomberg **CEO, Vitality Health International**

Hedley Goldberg **Partner, Rothschild & Co**

Ghada Trotabas **Managing Director GB & I, Siemens Healthineers**

Viviana Kane **Managing Director, EQT Partners**

Ville Iho **President & CEO, Terveystalo**

Chinta Bhagat **Managing Partner, L Catterton**

Hafid Rifi **CFO, Asklepios Kliniken**

Inaki Cobo **Partner, Private Equity, KKR**

Jide Olanrewaju **Managing Director, TPG Rise**

Prof Dr Christian Schmidt **CEO, GHD**

Rob Walton **President and CEO, EMEA, GE HealthCare**

Ran Balicer **Chief Innovation Officer, Clalit**

Prof John Gallacher **Director, Dementia Platforms UK, Oxford University**

Martin Henrichs **Head of Healthcare EMEA, UBS**

James Tugendhat **CEO, HC-One**

Dr André Schmidt **Group CEO, MEDIAN**

Johaness Roehren **Group CEO, TFP Fertility**

Martin Lindman **CEO, Doktor.Se**

Hendrik Hanekom **CEO, Intercare Group**

Joe Ryan **CFO, Medcover**

Lyndsey Reeves **Director of Operations UK, Kry**

Amaury Guerrero **CEO, Opty / Patria Group**

Markus Hamm **Group CEO, Veonet**

Petri Bono **Chief Medical Officer, Terveystalo**

Vasilis Sakkas **General Manager for Partnerships & Solutions, GEHC EMEA**



HBI 2023 At a glance

HBI 2023: Day one

Monday June 19

Scaling up for the Genetics and Data Revolution: Strategies for University Hospitals Forum

- 09:00 – 10:30** Registration and Networking
- 10.30 – 11.00** Keynote: What is possible today?
- 11.00 – 12.00** Keynote discussion: Challenges and solutions
- 12.00 – 12.30** Keynote: Implementing personalised medicine in a university hospital setting
- 12.30 – 13.30** Lunch and Networking
- 13.30 – 14.30** Panel Discussion: Building population health management solutions
- 14.35 – 15.20** Panel Discussion: Partnering Strategies
- 15:20** Tea break
- 15.40 – 16.10** Keynote: How to partner better
- 16.10 – 17.10** Interactive workshops: How to partner better
- 17.10 – 18.00** Building massive data platforms
- 18.00 – 20.00** HBI Welcome Reception

HBI 2023: Day two

Tuesday June 20

Innovating: New business models, digital and finance

- 07:45 – 08:45** L.E.K. Breakfast Briefing
- 08.00 – 09.00** Registration and Networking
- 09.00 – 10.00** The 2023 Healthcare M&A Landscape
- 10.00 – 11.00** Healthcare regulation: Opportunities and risks
- 11.00 – 11.30** Networking Break
- 11.30 – 12.30** Investing in Europe
- Investing in emerging markets
- 12.30 – 13.30** Investing in health care property
- Building value through partnerships
- Building the best model for digital
- 13.30 – 14.30** Lunch and Networking Break
- Women in Healthcare Lunch
- 14.30 – 15.30** This time it's personal: rethinking patient pathways
- Managing your costs in challenging times
- Investing in MENA
- 15.30 – 16.15** Networking Break
- Briefing: The role of the private sector in Ukraine's health recovery
- 16.15 – 17.15** Seeking efficiency: How tech is impacting operations
- Investing in DACH
- Models that cover more people
- 17.15 – 18.15** AI and Big Data: Monetisation and outcomes
- How to solve the workforce puzzle
- Investing in UK and Ireland
- 18.15 – 20.00** Networking Drinks Reception

HBI 2023: Day three

Wednesday June 21

Building: Robust ESG, Sector analysis

- 08.00 – 09.00** Networking and Breakfast
- 09.00 – 10.00** The Shape of Things to Come:
- 10.00 – 11.00** Building a robust ESG framework
- What is your elixir of growth? A Dentistry case study
- The outpatient differential
- The homecare technology revolution
- 11.00 – 11.30** Networking Break
- 11.30 – 12.30** Opportunities in Nursing homes
- Laboratory diagnostics - where after Covid?
- Dental models that benefit both customers and clinicians
- The investment opportunity in fertility and women's health
- 12.30 – 13.30** Networking Lunch
- 13.30 – 14.30** Opportunities in Mental Health
- Imaging Diagnostics: the care gateway
- Opportunities in Ophthalmology
- 14.30 – 15.30** Opportunities in Oncology
- The evolution in primary care
- 15.30 – 16.15** What we learned at HBI 2023



Topics are subject to change, visit our website for the most up-to-date agenda at:
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HBI 2023 The only CEO-level event to bring together the sector globally



To book scan the QR code or visit our website at:
<https://events.healthcarebusinessinternational.com/booking/>

CEOs and investors in for-profit healthcare operators have huge opportunities over the next decade. There are also many challenges. To maximise revenue and profits operators need to:

- Execute well on M&A
- Build a solid ESG impact framework
- Understand how to develop great partnerships
- Build brands that deliver
- Leverage digital and AI for efficiency, care and patient experience
- Develop a culture of innovation
- Build international businesses
- Recruit and retain the right people

HBI 2023 focuses on these challenges. Whatever sector you are in, and whether you are an operator, an investor, a supplier or an advisor, you will find huge relevance in our programme.

STATISTICS FROM HBI 2022

- **Over 550 delegates**
- **Over 140 investors attended**
- **42 countries**
- **42% CEO or equivalent**
- **72% CEO, CXO or senior management**

NEW FOR 2023:

100% relevance – We've redesigned the programme to ensure you can attend sessions which are completely relevant to your business right through the event!

More on partnerships – The 2023 HBI Strategies for University Hospitals Forum brings senior leadership from both public and private groups to explore how university hospitals, academic medical centres and research institutes can overcome challenges through partnerships.

More on innovation – With digital transformation well underway we look at the innovators who are using digital and AI to improve services, efficiency and patient access.

ESG Frameworks – We look at the what and why of ESG and how to develop a framework that will make a real impact.

More on investment – We will look further in depth at investment, how inflation is impacting M&A, financing options and share global expertise with our interactive regional investment briefings.

More networking – Over 12 dedicated hours built into the agenda combined with our powerful networking app, Connect members lounge and meeting zones.

Why say YES?

We understand just how hard it is to get time out to attend a multi-day event. HBI 2023 takes this into account with an agenda and content that is focused on bringing the very best speakers together to share their expertise and address the burning issues that you face today!

- Find new partners meet over 150 investors and 300 major operators
- Understand trends in the sector and how they will affect you
- Identify new markets and opportunities
- Understand AI and digital health and their impact on your business model
- Analyse the landscape of the industry nationally, regionally and globally
- Get practical advice on how to best finance new projects



To book scan the QR code or visit our website at:
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Optimise your business growth strategy using insights and conversations with your peers who have unique stories to tell.

Save time by meeting with hundreds of leading CEOs and decision makers under one roof to set you up for long term success.

Hear stories, case studies and data points to help seize the opportunity and keep up to date on the current business landscape.

Raise your professional profile by building relationships with new and existing clients.



Colour key

- Investment and M&A
- Innovation and Digital Transformation
- Partnership
- New Business Models
- Regional Opportunities
- Sector Analysis


Monday June 19: HBI 2023

Scaling up for the Genetics and Data Revolution

How do we best build comprehensive mass genetic testing and data platforms? This conference addresses this urgent, burning question faced by for-profit and university hospitals across Europe as new guidelines enforce the roll out of mass genetic testing, particularly in oncology.

Providers are also wrestling with the need for population health management systems linking them to primary care. Building all this capacity is a huge challenge calling for new payor structures, cultural change and new partnerships. This day looks at what is achievable and at how all this can be delivered. This forum along with our HBI Strategies for University Hospitals initiative explores what best practice looks like in these areas, at the reality on the ground and digs more deeply into how senior managers are engaging with these issues.


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| 09.00 – 10.30 | Registration and Networking |
| 10.30 – 11.00 Mountbatten | <p>Keynote: What is possible today? Presentation from CXO of one of the world's most advanced health care systems on the implementation of personalised healthcare / population health management platforms. What is possible today, what will be possible tomorrow?</p> <p>Ran Balicer, Chief Innovation Officer, Clalit</p> |
| 11.00 – 12.00 Mountbatten | <p>Panel discussion: Challenges and solutions What are the main barriers to the roll out of comprehensive genetic testing platforms for all patients? And what further challenges are imposed by broader population health management systems? How important is partnering in building these massive systems? Here we dissect the barriers and solutions which we then discuss during the day.</p> <p>Prof Anna Wedell, Director, Precision Medicine Centre, Karolinska Ran Balicer, Chief Innovation Officer, Clalit Dr Federico Esposti, COO, San Raffaele Hospital Moderated by Max Hotopf, Chairman & Founder, HBI</p> |
| 12:00 – 12:30 Mountbatten | <p>Keynote: Implementing personalised medicine in a university hospital setting Anna looks at how Karolinska has created a virtual organisation where scientists and physicians find new ways of interacting, promoting cross-disciplinary collaborations. She also reflects on the real potential offered by a new generation of genomic tests, embedded in clinical medicine</p> <p>Prof Anna Wedell, Director, Precision Medicine Centre, Karolinska Center for Inherited Metabolic Diseases, Karolinska University Hospital Department of Molecular Medicine and Surgery, Karolinska Institute</p> |

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| 12:30 – 13.30 | Lunch and Networking |
| 13:30 – 14:30 Mountbatten | <p>Building Population Health Management Solutions: Panel Discussion What are the real issues and challenges to building effective population health management solutions? What is the role of university hospitals in such systems and how can they best link into the wider health care system to develop a 360° view of the patient?</p> <p>Prof Pim Van der Harst, Head of Cardiology, University Medical Center Utrecht Dr Ingrid Wolfe, Director, King's Health Partners Women and Children's Health, King's College London Dr David Codling, Consultant Psychiatrist, South London and Maudsley NHS Foundation Trust Moderated by Reto Merges, Head of Innovating Personalized Care, Siemens Healthineers</p> |
| 14.35 – 15.20 Mountbatten | <p>Partnering Strategies: Panel Discussion This session brings together a group of senior managers whose role is to promote and build partnerships in the university hospital ecosystem. How are university hospitals changing their approach to partnering whether with primary care networks, governments or suppliers? And what are the main challenges they face?</p> <p>Joseph Casey, Director, Partnerships and Programmes, Kings Health Partners Prof Johan Van Eldere, Clinical Biologist, UZ Leuven Moderated by Max Hotopf, Chairman and Founder, HBI</p> |
| 15:20 | Networking Break |
| 15.40 – 16.10 Mountbatten | <p>Keynote Presentation: How to Partner Better Building these new platforms calls for multi-decade programmes and much deeper and more intricate partnerships between university hospitals and research centres and industry. In this keynote we explore what these partnerships should look like.</p> <p>Neil Wright, Commercial Director, Guy's and St Thomas NHS Foundation Trust</p> |
| 16:10 – 17:10 Mountbatten | <p>Interactive Workshops: How to Partner Better What steps do you need to take to partner more effectively whether with other provider networks or with medtech, pharma or tech? This round table small group workshop will enable you to assess where you are on the partnership ladder and to identify the actions you need to take to partner better.</p> |
| 17:10 – 18:00 Mountbatten | <p>Building massive data platforms: lessons and challenges IT and healthcare are a volatile combination! There is a long history of failed data projects! So how do you best build data platforms that are scalable and deliver the right outcomes? Dementias Platform UK is a world leading medical data platform with research data on 3.5m people and 60 cohort studies which brings together data from a vast range of sources including imaging, medical health records and the genome. John looks at what he has learnt since 2014. How do you best build such a platform and what are the mistakes to avoid?</p> <p>Prof John Gallacher, Director, Dementia Platforms UK, Oxford University Alex Beauvais, Partner, McKinsey & Company</p> |
| 18:00 – 19:30 Cambridge | <p>HBI Welcome Reception – Hosted by</p> <div>  </div> |

Tuesday June 20th: HBI 2023

Innovating: New business models, digital and finance

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| 08.00 – 09.00 | Registration and Networking | |
| 07:45 – 08:45 Whittle | L.E.K. Consulting – AI Breakfast Briefing <i>By invitation only</i> | |
| 09.00 – 09:45 Fleming | The 2023 Healthcare M&A Landscape Will M&A in health care come to a standstill or will mountains of dry powder see it power through? What will be the impact as inflation soars to its highest levels since the early 1980s and we face recession and a workforce crisis. Hedley Goldberg , Partner, Rothschild & Co | |
| 09:45 – 10:45 Fleming | Healthcare regulation: Opportunities and risks This remains the number one issue for health care investors and operators in most countries. Here we look in detail at what risks there are in different countries and sectors. What, if anything, can the sector do to allay them? Dr Stephan Rau , Partner, McDermott, Will & Emery Sharon Lamb , Partner, McDermott, Will & Emery Joe Ryan , CFO, Medicover Matthew Strassberg , Partner, MidEuropa Darkash Shah , Co-Founder and Non-Executive Director, Newmedica Moderated by David Farbrother , Editorial Director, HBI | |
| 10:45 – 11.30 | Networking Break | |
| 11:30 – 12:30 | Fleming | Whittle |
| | Investing in Europe How do major investors in the sector view the challenges it faces? How do they view environmental, societal and governance issues? In which sectors and countries do they see opportunities? Martin Henrichs , Head of Healthcare EMEA, UBS Nikolaus Woloszczuk , Senior Managing Director, Stonepeak Inaki Cobo , Partner, Private Equity, KKR Viviana Kane , Managing Director, EQT Partners Moderated by Max Hotopf , Founder, HBI | Investing in Emerging Markets Bearing the brunt of inadequate health systems, low and middle income countries are ripe for investment opportunities from the private sector. This session with leading emerging market investors outlines the challenges and the opportunities for investment, growth and innovation. Amaury Guerrero , CEO, Opty / Patria Zeynep Kantur , Global Manager & Global Head of Health, IFC Dr Stephen Sammut , Chair, Industry Advisory Board, Alta Semper Capital Jide Olanrewaju , Managing Director, TPG Rise Moderated by Max Ateba , Associate Partner, Dalberg Advisors |

| 12.30 – 13.30 | Fleming | Whittle | St James |
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| | <p>Building value through partnerships There is a massive opportunity for for-profit providers to work with many partners. In particular, that includes the public sector, given that it accounts for around 85% of all health care in EMEA. And often for-profit can deliver efficient, lower cost solutions. Unfortunately, for-profit is regarded with much distrust by many stakeholders. How do you build trust? How do you create a genuine win/win? And how do navigate the political map?</p> <p>A series of case studies that outline what works and what doesn't, lessons learned and the value and cost savings that result..</p> <p>Peter Wharton-Hood, Group CEO, Life Healthcare Guglielmo Brayda di Soletto, CEO, Ergéa Dr François Sarkozy, Founder and President, FSNB Health Moderated by Hamid Yunis, Partner, McDermott Will & Emery</p> | <p>Building the best model for digital Finding the business model that best leverages digital and technology is tough. Health care is littered with failed attempts at innovation and transformation. Often this is due to a misunderstanding of where value is really created and a failure to build integrated systems. This session looks at mistakes and lessons learnt. What does success look like for providers large or small and how is it achieved?</p> <p>Sourabh Pagaria, EMEA Lead Digitally-enabled Service EVP & Managing Director Southern Europe, Siemens Healthineers Hafid Rifi, CFO, Asklepios Thomas Hagemeyer, Healthcare Lead, TLGG Oskari Eskola, CEO, BeeHealthy Moderated by Klaus Boehncke, Partner L.E.K. Consulting</p> <p>Hafid explains how €5bn hospital group Asklepios has brought efficiency, cost saving and new revenue streams through digital investments. Thomas lays out the various business models adopted in digital health and identifies the challenges and benefits of each. Oskari shares how Mehilainen is leveraging its learnings to build a digitally enabled pan-European outpatient network.</p> | <p>Investing in Health Care Property A conversation with some of the largest health care property investors discussing topics such as: How robust is health care real estate to rising inflation? What ESG frameworks are in place and what is lacking? What impact is the lack of available debt having on transactions?</p> <p>Stephane Pichon, Founder and Managing Partner, Your Care Consult Steve Hamner, CFO and Co-Founder, MPT Xavier Cheval, CEO, Icade Dr André Schmidt, CEO, Median Moderated by Hugh Risebrow, Managing Director, Latchmore Associates</p> |
| 13.30 – 14.30 | <p>Conference Lunch – Hosted by  Medical Properties Trust</p> <p>Britten</p> | | |
| | <p>Women in Health and Care Services - Networking Lunch Healthcare has throughout history been an industry in which women outnumber men, yet at a senior level, women and in particular women of colour are still in the minority. Join this fireside chat and networking lunch to discuss challenges facing the industry, best practices and how to make an impact. We are delighted to be joined by Katya Zubareva, Partner a L.E.K. Consulting and HBI's Intelligence Editor, Kirsty Withams, who will share experiences and facilitate the session. Katya heads up L.E.K. Europe's Women's network and is a champion for equality and diversity Westminster</p> | | |



“Here you meet best of breed, hear the latest trends and the best people for great networking.”

Ville Iho, President & CEO, Terveystalo, Healthcare Provider, Finland

| 14.30 – 15.30 | Fleming | Whittle | St James |
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| | <p>This time it's Personal: Rethinking patient pathways One-size-fits-all health care delivery is stuck in the past. Using data, genomics and an understanding of each patients' specific needs, environment and history and developing a personal care pathway is proving to increase outcomes and lower costs. Payors in markets such as France are starting to fund such an approach, opening up new revenue opportunities. This session evaluates early data from such endeavours and looks at how operators and health systems can scale-up efforts.</p> <p>Thierry Chiche, CEO, Elsan Vasilis Sakkas, General Manager, Partnerships & Solutions EMEA, GE HealthCare Dirk Knueppel, CEO, Primärmedizin TMVZ GmbH Moderated by Thomas London, Partner, McKinsey & Company</p> <p>Thierry outlines two projects using personalised medicine; one that is pre-empting cancer and another that is turning into €50m revenue boost</p> | <p>Managing your costs in challenging times Rising inflation, wages and energy costs are hitting the sector and despite government support packages, the road ahead looks arduous. So how do providers control costs? This session explores strategies to keep costs at bay from strategic procurement to efficiency gains and getting more out of your existing technology.</p> <p>Joe Ryan, CFO, Medicover Ville Iho, President & CEO, Terveystalo Jim Easton, Group CEO, Practice Plus Group Moderated by Max Hotopf, Founder & Chairman, HBI</p> <p>Few people are better placed than Joe to deal with challenging operating environments. In his 27 years at Medicover he has seen it all from credit crisis to political instability and war. Rising inflation and new health reform in Finland has meant that Terveystalo has had to focus hard on managing costs. Ville discusses the impact whilst increasing productivity and the service to patients.</p> | <p>Investing in MENA Opportunities in MENA, in particular in Saudi Arabia, are gigantic but accessing and understanding these markets isn't easy, it requires strong local knowledge and partners to be successful. In a highly competitive, brand-oriented market getting it wrong is disastrous. This session discusses the opportunities and gives practical advice on how to succeed. The session is followed by a networking break to meet local partners and investors.</p> <p>Youssef Haidar, Founder and CEO, StonePine Capital Partners Dr Adil Monshi, Director General Investments Promotion, Ministry of Health, Saudi Arabia Michael Ferstl General Manager, VAMED KSA Abhishek Sharma, Founder CEO, Foundation Holdings Moderated by Hamid Yunis, Partner, McDermott, Will & Emery</p> <p>StonePine has invested extensively across the GCC and the wider Middle East. StonePine's fund Nexus Gulf has partnerships with European groups including Cerba and Alliance Medical.</p> |
| 15:30 – 16:15 | Networking Break | Briefing: The role of the private sector in Ukraine's health recovery | |
| | <p>Britten</p> | <p>The recovery of Ukraine's health sector, along with energy, education and housing is high on the Government's priority list calculated in March at €383 billion. The private sector has a huge role to play in this and as such the government is structuring PPPs to encourage investment. This briefing, featuring representatives from the Ukrainian Ministry of Health and development finance institutions outlines the situation and how to successfully invest and play a role in the country's recovery. The UK government is hosting the Ukrainian Recovery Conference in London, June 21 and 22 and we are holding this session to raise awareness of the situation.</p> <p>Oleksii Iaremenko, Head of Health Recovery, Ministry of Health, Ukraine Mark Hellowell, Director of the Global Health Policy Unit, University of Edinburgh Frederic Lucenet, Head of Manufacturing and Services, EBRD Moderated by Lee Murray, Event Director, HBI</p> <p>Fleming</p> | |



“I believe that every organisation should strive to be at the cutting edge and in order to be at the cutting edge you need to come to events like this.”


Ran Balicer, Chief Innovation Officer, Clalit Health Services, Health Insurer and Provider, Israel

| 16.15 – 17.15 | Fleming | Whittle | St James |
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| | <p>Seeking efficiency: How tech is impacting operations</p> <p>In a world of complexity, of rising costs, waiting lists and staff shortages, finding efficiency within your existing operations and resources is critical not only to staying afloat but to growth. This session explores the ideas and direct impact that AI, data and digital transformation have had already, and will have in the near future, on operational and workforce efficiency. A mixture of the practical and the possible to inspire idea generation around tackling some of the biggest issues faced by providers.</p> <p>Ghada Trotabas, Managing Director GB&I, Siemens Healthineers Dr Nadine Hachach-Haram, Clinical Lead for Innovation, GSTT & CEO, Proximie Jacqs Harper, Technology Director, Nuffield Health Moderated by Hugh Risebrow, Managing Director, Latchmore Associates</p> | <p>Investing in DACH</p> <p>The 100m population of wealthy German-speaking countries is by far the largest market for healthcare services in Europe. What will be the trajectory for future consolidation, who are the players and what is the opportunity? A wide-ranging exploration with expert advisors, investors and operators discussing the region's investment opportunities, growth sectors and regulatory environment.</p> <p>Andreas Ludowig, CEO, Kinios Dirk Knüppel, CEO, Primärmedizin TMVZ GmbH Julius Hugelshofer, Senior Principal, Verlinvest Dr Axel Paeger, CEO, Ameos Hospital Group Moderated by Dr Stephan Rau, Partner, McDermott, Will & Emery</p> <p>Backed by Triton Partners, Kinios is consolidating the German outpatient orthopaedic space. Leveraging the scale of Kielstein group, Germany's largest primary care network, Primärmedizin is looking to build an outpatient network specialising in internal medicine.</p> | <p>Models that cover more people</p> <p>Subscription models, a rise in employee paid-for insurance, digital apps and engagement, building their own ecosystems - insurers are working with providers and making fundamental changes to health care delivery. This session explores these initiatives and their impact.</p> <p>Dr Hendrik Hanekom, CEO, Intercare Group Katie Wadey, Chief Product and Commercial Officer, SimplyHealth Moderated by Tom McMullen, Managing Director, HBI</p> |
| 17.15 – 18.15 | <p>AI and Big Data: Monetisation and Outcomes</p> <p>How can and have health care operators implemented AI and big data platforms to improve patient outcomes? Where are we on the journey to automate delivery of care? And how what commercial models work best? Using imaging and radiotherapy case studies, this session outlines what is possible now and where the technology will take us next. We look at how AI enables reporting standardisation for radiologists and how automation in radiotherapy will one day soon take diagnosis to treatment from 2 weeks to just 15 minutes!</p> <p>Antoine Jomier, Co-Founder & CEO, Incepto Hugues Brat, General Manager, 3R Nikos Paragios, CEO, TheraPanacea Moderated by Jean-Guillaume Bayada, Partner, L.E.K. Consulting</p> | <p>Investing in UK & Ireland</p> <p>The UK remains by far the largest market for private equity investment in Europe. But what are the dynamics post-Covid and post-Brexit? A wide-ranging exploration with expert advisors, investors and operators discussing the region's investment opportunities, growth sectors and regulatory environment.</p> <p>Katie Beckingham, Director, August Equity LLP Alan Hughes, Founder, LIT Healthcare James Tugendhat, CEO, HC-One Dr Charles Niehaus, Executive Director, Affidea Group Moderated by Sharon Lamb, Partner, McDermott, Will & Emery</p> | <p>How to solve the workforce puzzle</p> <p>How do you best recruit and retain a strong workforce in nurses, doctors and specialist staff? What role does training and culture play here? Providers present case studies on how they have managed to shift the needle.</p> <p>Sandra Röddiger, Executive Partner, RadioOnkologieNetzwerk, Ergéa Group Rachel King, Group People Director, Spire Healthcare Emma Pearson, CEO, Achieve Together Moderated by Eilert Hinrichs, Partner, L.E.K. Consulting</p> <p>The gulf has long been known for its dependence on expat workers. Fatih discusses how Fakeeh is building a pipeline of locally trained Saudi and UAE clinicians to plug gaps and even export to other markets. Sandra explains how RadioOnkologieNetzwerk (RON) has developed its own training institute and talent pipeline offering a more practical approach than the traditional university pathway.</p> |
| 18.15 – 20.00 Britten | HBI 2023 Champagne Networking Reception – hosted by  Rothschild & Co | | |

Wednesday June 21st: HBI 2023

Building: Robust ESG, Sector analysis


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| 08.00 – 09.00 Britten | Networking and Breakfast | | | |
| 09.00 – 10.00 Fleming | <p>The shape of things to come</p> <p>The health care sector is set to change dramatically over the next five years. Our panellists look at how and at what this means for anyone running a scale business in the sector. We start with a presentation from Chinta Bhagat, partner at L Catterton which looks at the elision of wellness and health care services, the rise of the omnichannel, the move to outpatient and personalised medicine. He was previously head of global healthcare at Khazanah Nasional Berhad, where he was closely involved with IHH, the largest emerging markets private hospital group. He also spent 14 years at McKinsey & Company where he was a leader in the principal investor and healthcare practices and worked extensively with private equity and sovereign wealth funds to drive their healthcare investing agenda.</p> <p>Chinta Bhagat, Managing Partner, Asia, L Catterton Dr Jonathan Broomberg, CEO, Vitality Health International Rob Walton, President & CEO, Europe, Middle East & Africa, GE HealthCare Guy Blomfield, CEO & Chairman of the Supervisory Board, Affidea Moderated by Max Hotopf, Founder and Chairman, HBI</p> | | | |
| 10.00 – 11.00 | Fleming | Whittle | St James | Westminster |
| | <p>Building a robust ESG framework</p> <p>Environmental, Social and Governance frameworks are of vital importance, following a series of scandals which have had a huge impact on brands and share price. A good ESG framework can justify a higher valuation for healthcare businesses. This session at why it's crucial to get ESG framework right.</p> <p>Therése Lennehag, Head of ESG Advisory EMEA, UBS Investment Bank Glyn Richards, Group Head of Sustainability, Bupa Thomas Rajzbaum, Partner, EQT Partners Marion Cardon, Chief Brand and Engagement Officer, Korian Moderated by Libbi Lee, Partner, McKinsey & Company</p> <p>As ESG becomes pivotal to transactions, having experts on hand to guide clients is like gold-dust for investment banks. Therese discussed the growth in importance and how to prioritise and leverage ESG initiatives</p> | <p>The outpatient differential</p> <p>How care is delivered has changed forever. The move from a pure hospital setting, to out of hospital clinics and the use of digital tools such as virtual wards promise to reduce costs, grow supply, and ease health system pressure. This session looks at how and why outpatient models are shaping the future of healthcare delivery globally with real data and examples of cost savings, efficiency increase, and patient satisfaction..</p> <p>Chris Robson, Managing Director, Akeso & Co Zisis Sotiriou, Senior Vice President, Regional COO, Affidea Vivek Shukla, Managing Partner, Surge Management Consulting Dr Arun Thiagarajan, Global Director Healthcare Transformation, Bupa Moderated by Joe Quiruga, Analyst, HBI</p> <p>Chris is working with NHS England to implement 40-50 virtual beds per 100,000 people. He shares the lessons learned implementing such wards, the technology required and the early outcomes from projects.</p> | <p>What is your elixir of growth? A dentistry case study</p> <p>Using case studies from dental service CEOs, this session explores how outpatient groups best pursue growth. Does bigger always equal better? What is the right balance between acquisition and greenfield? How should your brand appeal to different customer groups? How do you calculate the value in adding new services?</p> <p>Bob Fontana, Chairman & CEO, The Aspen Group Tom Riall, Executive Chairman, {my}dentist Sam Waley-Cohen, Founder and CEO, Portman Healthcare International Group Rahma Samow, EVP, Straumann Group Moderated by David Farbrother, Editorial Director, HBI</p> | <p>The homecare technology revolution</p> <p>This is a sector with massive growth potential but huge issues, ripe for a tech and digital overhaul with new models that both support but also compete with existing provisions. This session features three digital players shaking up the system, tackling the much-needed challenges of workforce, efficiency, cost savings, family and carer support and continuity of care. It explores new business models, innovation and growth potential of domiciliary homecare services.</p> <p>Jan Hoffman, Co-Founder, Marta Max Parmentier, Co-Founder & CEO, Birdie Peter Dowds, Moderated by Michaila Byrne, Senior Analyst, HBI</p> <p>Marta is a platform that matches families with live-in carers, a faster, cheaper alternative to the traditional agency model. Jan discusses growth and benefits of the model.</p> |

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| 11.00 – 11.30 Britten | Networking Break | | Dentistry Networking Break <i>By invitation only</i> St James  | |
| 11:30 – 12:30 | Fleming | Whittle | St James | Westminster |
| | <p>Laboratory diagnostics - where after Covid? Diagnostic labs saw massive growth during Covid. How has this changed the long-term outlook for the sector? For instance, has Covid enabled the sector to successfully build new relationships with government and public payors? This session also explores growth opportunities in outsourcing, new tech, verticalisation and emerging markets</p> <p>Jerome Thill, CEO, Groupe Cerba Healthcare Wolf Kupatt, CEO, Amedes Staffan Ternström, COO Diagnostic Services, Medicover Moderated by Martin Debenito-Gellner, Senior Analyst, HBI</p> | <p>The investment opportunity in fertility and women's health The fertility sector continues to steadily grow, but with a fragmented market, consolidation is not straightforward. And the revolution to address health inequalities for women presents a huge opportunity – around fertility, pregnancy and the menopause. Meanwhile femtech is set to be a \$50bn industry by 2025. This session looks in depth at future growth prospects with speakers from two of the largest international consolidators - Virtus and TFP.</p> <p>Richard Banks, Group Chief Strategy Officer & European Managing Director, Virtus Health Johannes Roehren, Group CEO, TFP Fertility Katya Zubareva, Partner, L.E.K. Consulting Annie Coleridge, Product Director, Corporate, SimplyHealth Moderated by Hugh Risebrow, Managing Director, Latchmore Associates</p> <p>Australian-based fertility group, Virtus was the subject of a bidding war in 2022 highlighting the growth opportunity in fertility services. With 25 clinics in the UK, Denmark, Netherlands, Poland, Austria and Germany the Impilo owned group is focussed on dominating the northern European market.</p> | <p>Dental models that benefit both customers and clinicians A huge benefit of outpatient models is the ability to lower barriers for customers through locations, longer operating hours and more convenience. But what impact does this have on the happiness of clinicians? Through the lens of dental services, this session features CEOs discussing how they have balanced the needs and demands of both groups, harnessing technology, building the right culture and ensuring the future workforce.</p> <p>Javier Martín, CEO, Donte Group Mirko Puccio, Founder and CEO, Primo Caredent Group Jörg Aumüller, VP Enterprise Solutions, Straumann Group Moderated by David Farbrother, Editorial Director, HBI</p> | <p>Opportunities in Nursing Homes Covid-19 and scandals rocked the sector in 2022. Our panel of experts share their views on the opportunities and challenges as we look ahead to the next 3 years.</p> <p>Buyanzaya Batbileg, Head of Investment, Threestones Capital Management Threestones has three funds totalling more than a billion Euros investing in nursing homes in Germany, Italy and Spain Nate McLemore, Managing Director, Columbia Pacific Management Dr Sanjeev Kanoria, Founder and Chairman, Advinia Health Care Moderated by Michaila Byrne, Senior Analyst, HBI</p> |



“HBI is one of the absolutely key healthcare platforms for discourse and networking in the world.”

Helmut Schuehsler, Chairman & CEO, TVM Capital Healthcare

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| 12.30 – 13.30 Britten | Conference Lunch - Hosted by  GE HealthCare | | |
| 13.30 – 14.30 | Fleming | Whittle | St James |
| | <p>Opportunities in diagnostic imaging and teleradiology Diagnostic imaging has seen a huge M&A boom as investors seek to consolidate Western Europe. What's driving domestic and cross-border consolidation? What are the benefits of scale? Operators of diagnostic clinics have also been acquiring specialist teleradiology groups (Mednax/vRad, Unilabs/TMC, I-MED/Vital, Evidia/4ways). What's the winning model in teleradiology – independent or vertically integrated? Where are the new market opportunities?</p> <p>Rob Anderson, Global CEO, Everlight Radiology Jan Hörnström, CEO, Evidia Nordics Steve Bird, CEO, Medical Imaging Partnership Moderated by Thibault Poirier, Managing Director, Rothschild & Co</p> | <p>Opportunities in Ophthalmology Ophthalmology continues to be a big area of investor interest with considerable scope for consolidation. Governments are increasingly outsourcing cataract operations, and the sector is starting to unlock the potential for multifocal lenses in middle age. Panellists include the CEO of Veonet, the largest European ophtha chain and the CEO of Opty, the largest in LatAm.</p> <p>Dr Markus Hamm, Group CEO, Veonet Veonet has added a new string to its bow expanding into Spain with a recent acquisition as it's sights turn to further European expansion and consolidation. Markus outlines the group's strategy and integrating the different businesses. Dr Michael Ahtelik, Head of Global Key Accounts, Carl Zeiss Meditec Amaury Guerrero, CEO, Opty / Patri Group Brazil's biggest ophthalmology group is taking the benefits of the outpatient model to grow into orthopaedics, ENT and Urology. Amaury explains the growth plans and why now is the right time to expand. Paul Tomasic, MD Head of European Healthcare, Houlihan Lokey Moderated by Tobias Koesters, Partner, L.E.K. Consulting</p> | <p>Opportunities in Mental Health The world faces a mental health pandemic. How far can this be met by digital therapeutics and how can operators consolidate this fragmented sector? And how far are more acute psychiatric needs being addressed in the for-profit sector? Participants include Andre Schmidt, Group CEO Median, the biggest German rehabilitation group which acquired the Priory, the UK's largest mental health provider in late 2020 and Petri Bono, CMO at Terveystalo, which has reduced mental health absences at client companies by 40%.</p> <p>Petri Bono, CMO, Terveystalo Petri shares how Finland's largest private health and occupational health group developed new, cost efficient patient pathways that lead to a 40% decrease in mental health absences. Dr André Schmidt, Group CEO, Median Alexandra Prioux, CEO, Alcediag Simon Miller, International Partnerships Lead, Headspace Health Moderated by Dr Stefan Schrettle, Partner, L.E.K. Consulting</p> |
| 14.30 – 15.30 | Fleming | Whittle | |
| | <p>Opportunities in Oncology There is still a long way to go to build capacity in oncology care, but with huge investor interest, linked to the close synergies with imaging diagnostics, the opportunities are huge. Add in public sector outsourcing and there's a lot of room for growth. This session explores the opportunities and analyses the best models to build capacity. Ralf Kurek heads up one of the largest players in the sector internationally.</p> <p>Dr Ralf Kurek, Executive Partner, RadioOnkologieNetzwerk, Ergéa Group Radiotherapy and outpatient oncology is another key sector for consolidation across Europe with investors such as DWS, owners of RON through Medipass, and Infravia building Pan-European chains. Here Ralf takes the lid off RON's business model Ralph Hefti, CEO, Stingray Healthcare Nikos Paragios, CEO, TheraPanacea Moderated by Joe Quiruga, Analyst, HBI</p> | <p>The evolution in Primary Care The huge primary care sector in Europe holds the key to outpatient consolidation. Here we look at how operators are pairing it with digital and telehealth, pharmacies and imaging, and at how they are reimagining its delivery and business models.</p> <p>Dr Murray Ellender, CEO & Co-Founder, eConsult Lyndsey Reeves, Director of Operations UK, Kry/Livi Dirk Knüppel, CEO, Primärmedizin TMVZ GmbH Moderated by Martin Debenito-Gellner, Senior Analyst, HBI</p> | |



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| 15.30 – 16.15 | What we learned at HBI 2023 A look at the learnings from HBI 2023 with analysis of the main trends and a summary of the key data points and slides to take away Martin Henrichs , Managing Director, Head of Healthcare – EMEA, UBS Max Hotopf , Chairman and Founder, HBI |
| Britten | |

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