



Seizing the Opportunity

JUNE 20-22, 2022

IN-PERSON, QEII CENTRE, LONDON

POST CONFERENCE REPORT



Strategic Partners



Event Partners



Seizing the opportunity

Bounce, energy, contact - three words that best describe HBI 2022, which saw more than 500 happy delegates from 42 countries return to the QEII conference centre, opposite Westminster Abbey in central London. Each person seizing the opportunity to return to travel to in-person events for the first time in more than two years. The delegates in attendance represented more than half of the top 100 health care services operators by revenue in the sector and over 142 investors.

Everyone wanted to understand the business opportunities in a post-Covid world and to take advantage of gleaning those insights and opportunities face to face. Feedback was the most positive it has been in the 13 years that the event, the only CEO-level forum dedicated to health care services globally, has been running.

We would like to take the opportunity to thank everyone who made the trip to London, it was an absolute pleasure to meet and share ideas once again. In particular we would like to thank the continued support from our Strategic Partners and our Event Partners.

The first day saw the launch of HBI's Strategies for University Hospitals initiative, with a half-day devoted to how to make partnerships between University Hospitals and a range of stakeholders work. Speakers discussed how to break down silos between hospitals and research institutes. How university hospitals are catalysts for innovation developed both inside and outside the organisations. And how the development of large digitally underpinned platforms will mean working much more closely with suppliers for years to come.

Day Two saw the official start of HBI 2022 providing case studies and looking in depth at major trends such as increasing capacity in diagnostic imaging, integrated care models, improving patient experience and how to embed digital and AI into business models.

As ever, there were spotlights on the opportunities, dynamics, and business models in sectors as diverse as hospitals, assisted living, elderly care, and dentistry. Plus, a particular focus on fast-moving consolidation in the outpatient sector. And HBI's famous investment sessions provided a unique forum to look at the sector's financial prospects.

2022 HIGHLIGHTS

500+

Delegates

120+

Speakers

72%

CEOs or
CXOs

45+

Hours of
content

42

Countries
represented

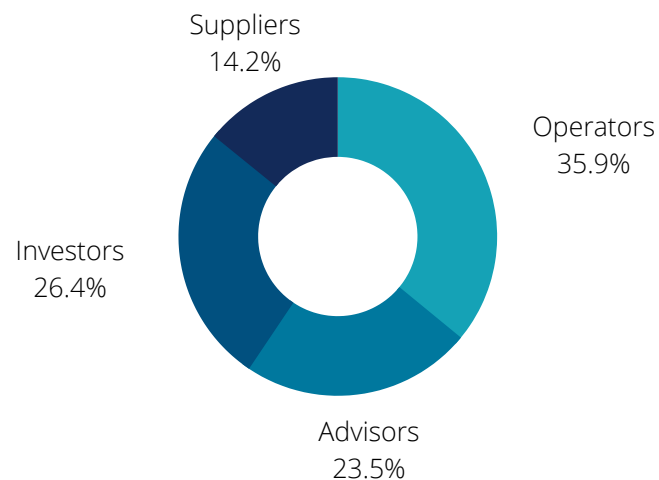
142

Investors

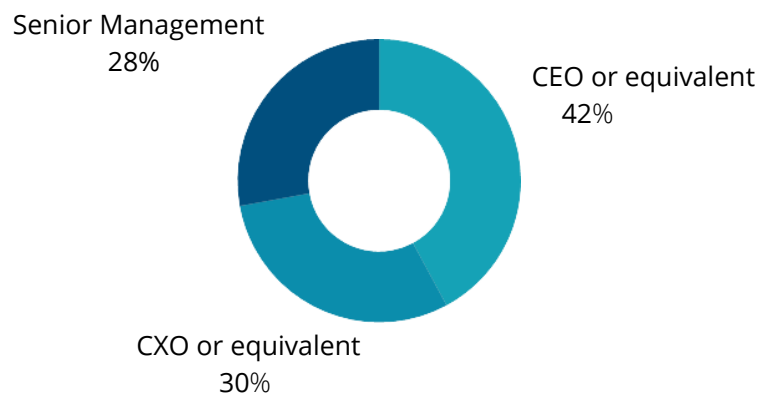
193

Operators

DELEGATE BREAKDOWN



SENIORITY LEVEL



COUNTRIES REPRESENTED



- | | | | |
|------------------|----------------|------------------------|--------------|
| - United Kingdom | - Switzerland | - Portugal | - Romania |
| - Germany | - Netherlands | - United States | - Angola |
| - France | - South Africa | - United Arab Emirates | - Luxembourg |
| - Belgium | - Czechia | - Ireland | - Israel |
| - Finland | - Sweden | - Brazil | - Turkey |
| - Spain | - Latvia | - Singapore | - India |
| | - Norway | | |

"I think its exceedingly important to use events like HBI in order to get the state of the art view from different organisations - by taking some of the case studies from those who made it and those who failed, you can continuously improve so I believe every organisation should strive to be on the cutting edge, and in order to be on the cutting edge you need to be at events like HBI."

- **Ran Balicer**, Chief Innovation Officer, Head of Innovation Division, **Clalit Health Services**

EXCLUSIVE INSIGHTS - AN INTERNATIONAL PERSPECTIVE

120+ speakers shared the latest on where the industry is headed, what the key trends are for 2022 and beyond, and case studies exploring the latest best practice solutions.



Chris Coburn,
CIO,
Mass General Brigham, USA



Björn Zoega,
CEO,
**Karolinska University
Hospital, Sweden**



Misty Hathaway,
Vice President, International and
Specialized Healthcare Services,
**Massachusetts General
Hospital, USA**



Hedley Goldberg,
Partner,
Rothschild & Co



Martin Henrichs,
Managing Director - Head of
Healthcare EMEA
UBS



Dr Nick West,
Chief Medical Officer,
Divisional Vice President,
Medical Affairs, Vascular
Abbott



Dr. Nadine Hachach-Haram,
Board Member,
Ypsomed



Dr. Mohamad Hamade,
CEO,
Amanat Holdings



Kirsty Bashforth,
SVP, Chief Business Officer,
Diaverum



Thierry Chiche,
CEO,
Elsan



Fredrik Ragmark,
CEO,
Medicover



Betul Susamis Unaran,
Board Member,
Ypsomed



Peter Wharton-Hood,
Group Chief Executive,
Life Healthcare



Somesh Chandra,
CEO, Employee Benefits of
AXA Domestic Markets,
AXA Group



Dr. David Rhew,
Chief Medical Officer and VP
of Healthcare
Microsoft



Anja Bickelmaier,
Co Head of Healthcare
Triton Partners



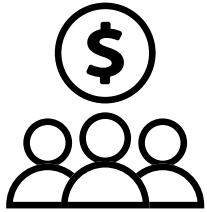
Daniela Hommel,
Chief Financial Officer,
Strategy & Innovation
Helios Global Health



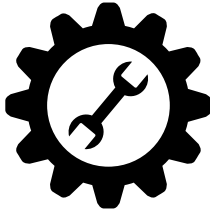
Jide Olanrewaju,
Partner
TPG Growth

INSIGHTS FROM THE AUDIENCE

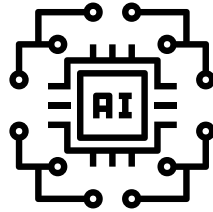
TOP RATED SESSIONS



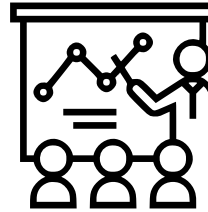
Partnering with investors and start-ups



How to build a brand



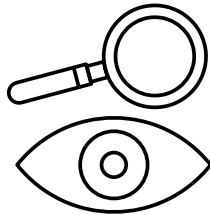
The truth about AI



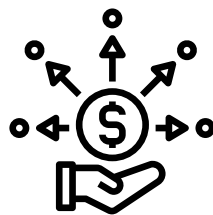
New approaches to training



Fertility: Sector Analysis



Ophthalmology: Sector Analysis



2022 Healthcare M&A Landscape



Investing in MENA

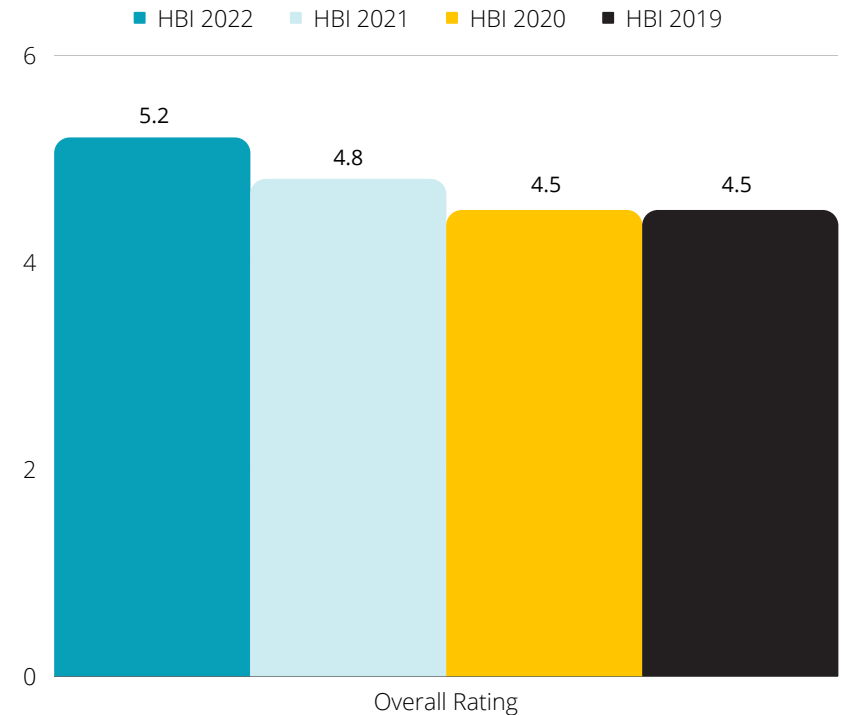


Investing in UK and Ireland



Partnering with other hospital groups internationally

OVERALL RATING



"I think this event is incredibly valuable, it brings a lot of likeminded people across the whole broader healthcare sector together. The more we share global learnings, the more we can accellerate our own learnings."

- Nadine Hachach-Haram, Founder & CEO, Proximie

WHAT WE LEARNT

- Platforms which can track and build relationships with individuals at every stage of their patient journey are developing fast
- Telemonitoring and telehealth are liked by many patients and represent a huge opportunity for the for-profit sector
- Patient demand in for-profit services is set to rise strongly
- Investors are not put off by high valuations and are keen to do deals but are paying closer attention to business models, leadership and anticipated revenue synergies
- The biggest headache for everyone is the recruitment and retention of both clinical and non-clinical staff
- The debt markets could be a headache in the second half of 2022
- University Hospitals are becoming much more commercial and are hungry to partner and invest
- Health insurers are seizing the first mile of the patient journey with free primary care



"HBI events are of great value for two main reasons - firstly there's the broad geographic stretch from Europe as far as Singapore - incredible geographic reach - and secondly there's the broad representation of sectors from acute to diagnostics to digital care - in fact I can't think of any part of the healthcare system that is not included in the agenda."

- Alan Hughes, Principal, LIT Healthcare

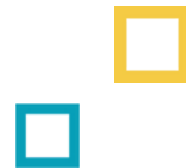
SELECTED COMPANIES REPRESENTED AT HBI 2022

- Abbott GmbH
- Affidea
- AfyACare Nigeria Limited
- Alliance Medical Limited
- Alloheim Senioren-residenzen GmbH
- Almaviva Sante
- Alta Semper Capital
- AMERICAN HOSPITAL sh.a.
- Anest Gruppe
- Apax Partners
- Apollo
- Apposite Capital
- Boston Consulting Group
- British International Investment
- Bupa UK
- Cambridge Medical & Rehabilitation Center
- Canberra International GmbH
- Charterhouse Development Capital Limited
- Cigna International Corporation
- Dalberg Advisors
- DAM Group UK Limited
- Deutsche Bank AG (UK)
- Diaverum AB
- Diversey Europe Operations BV
- DWS Group
- Ecclestone Associates Limited
- eConsult
- EDU
- Elsan
- Eurofins Clinical Diagnostics
- European Union of Private Hospitals
- Exemplar Health Care
- Fusion Corporate Partners (UK) Limited
- FutureLife
- GE Healthcare
- Gensmile Dental Care Limited
- Groupe Bruxelles Lambert
- Gruppo Ospedaliero San Donato
- Healthcare Activos Management, SL
- Herbert Smith Freehills
- Highlander Partners Healthcare SRL
- Holland Capital
- Hospitaria
- HSBC UK
- Humanitas Mirasole S.p.a
- IBM Consulting
- Institute of Biomedical Science
- Institut Straumann AG
- Integrated Diagnostics Holdings (IDH)
- Johnson & Johnson UK
- JP Morgan
- L.E.K. Consulting
- LeapFrog Investments Group Ltd.
- Life Healthcare
- Lincoln International LLP
- LIT Healthcare
- Luscii
- Lusiadas Saude
- Macquarie Infrastructure and Real Assets (MIRA)
- McDermott Will & Emery
- Medcover
- Meine Radiologie Holding
- Microsoft
- Morgan Stanley Investment Management Limited (UK)
- NorthWest Healthcare Properties REIT - NWI Management GmbH
- Octopus Ventures
- Orpea
- PointCo Capital
- Proximie
- PwC GmbH WPG
- RAD-X
- Siemens Healthineers
- Simmons & Simmons
- Triton Partners
- TVM Capital Healthcare Partners
- UBS AG (Germany)
- Your Care Consult
- Ypsomed
- 21Dx GmbH



HBI 2023 - Building Innovation and Sustainability

June 19-21, 2023



The only global C-level conference focused on for-profit health care services returns to the QEII Centre, London on June 19-21, 2023.

Register your interest to speak, sponsor or attend next year's conference and keep up to date with the latest developments and content.

REGISTER YOUR INTEREST



The Impact of Increased Access to Telemedicine

Results:
Access to telemedicine is associated with:
• a small increase in primary care utilization;
• a small decrease in the overall cost of care.

Methods:
"Diff-in-Diff" and comparing remote and in-person visits, but rather:
1. Classify doctors by high and low users of telemedicine (during the lockdown).
2. Compare utilization and outcomes of patients of high vs low adopters (high and low "access" to telemedicine), post-lockdown, relative to the pre-COVID.

	The Lockdown Mean	Estimated Impact	Percentage Impact (%)
A. Utilization			
Any Healthcare Utilization	933	0.002	0.2%
Any Primary Care Episodes	0.25	0.001	0.5%
B. Cost (M\$)			
Total Healthcare Cost	90	-14	-15%
Total Cost of Primary Care Episodes	100	-8	-8%

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Healthcare Business International 2023

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