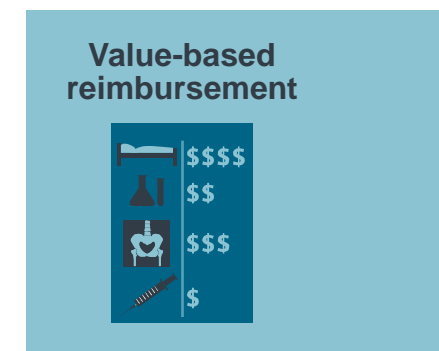
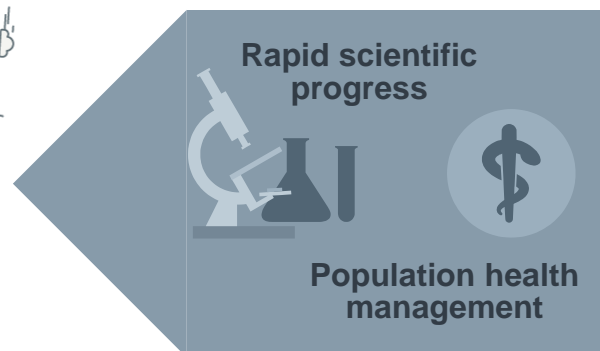
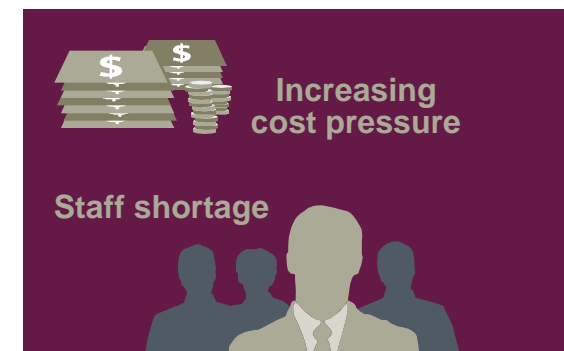
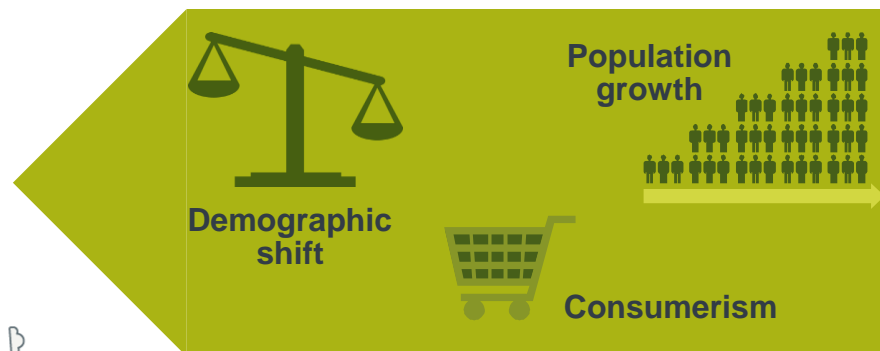


# The Future of Healthcare Services:

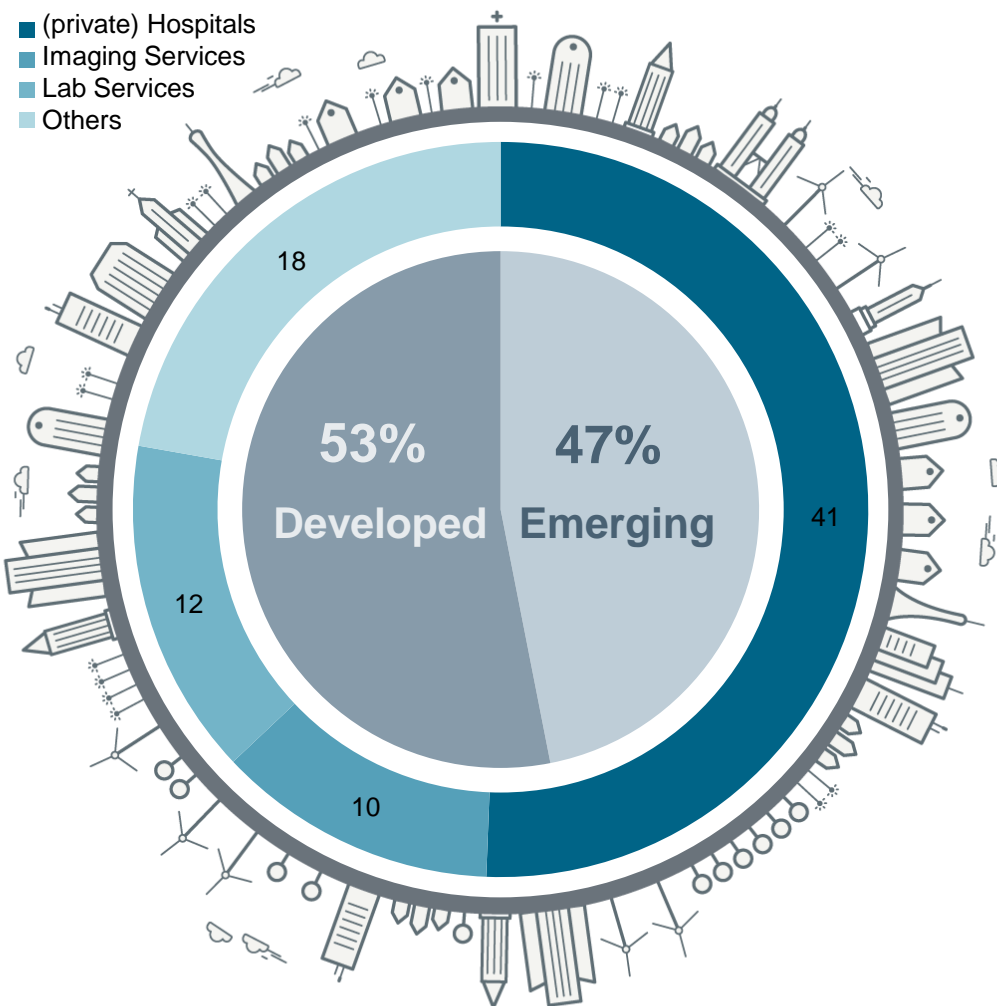
Is faster-than-market growth in your company's future?

João Seabra, President Siemens Healthcare Western Europe and Western Africa

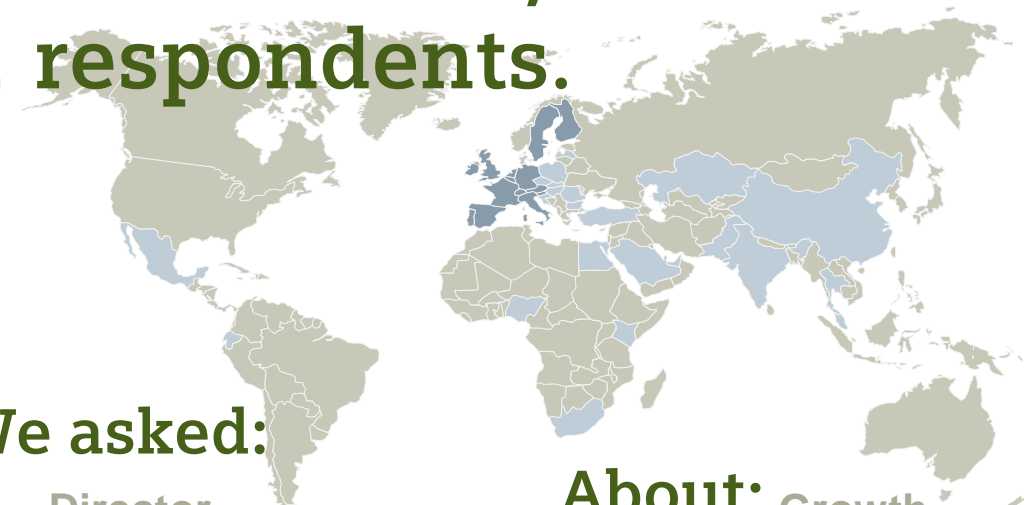
# The healthcare market is changing



We asked you, to check if we have a common understanding on what is going on in the healthcare market



37 countries,  
81 respondents.



We asked:

Director  
General Manager  
Chairman  
CFO  
Vice President  
Operation Management

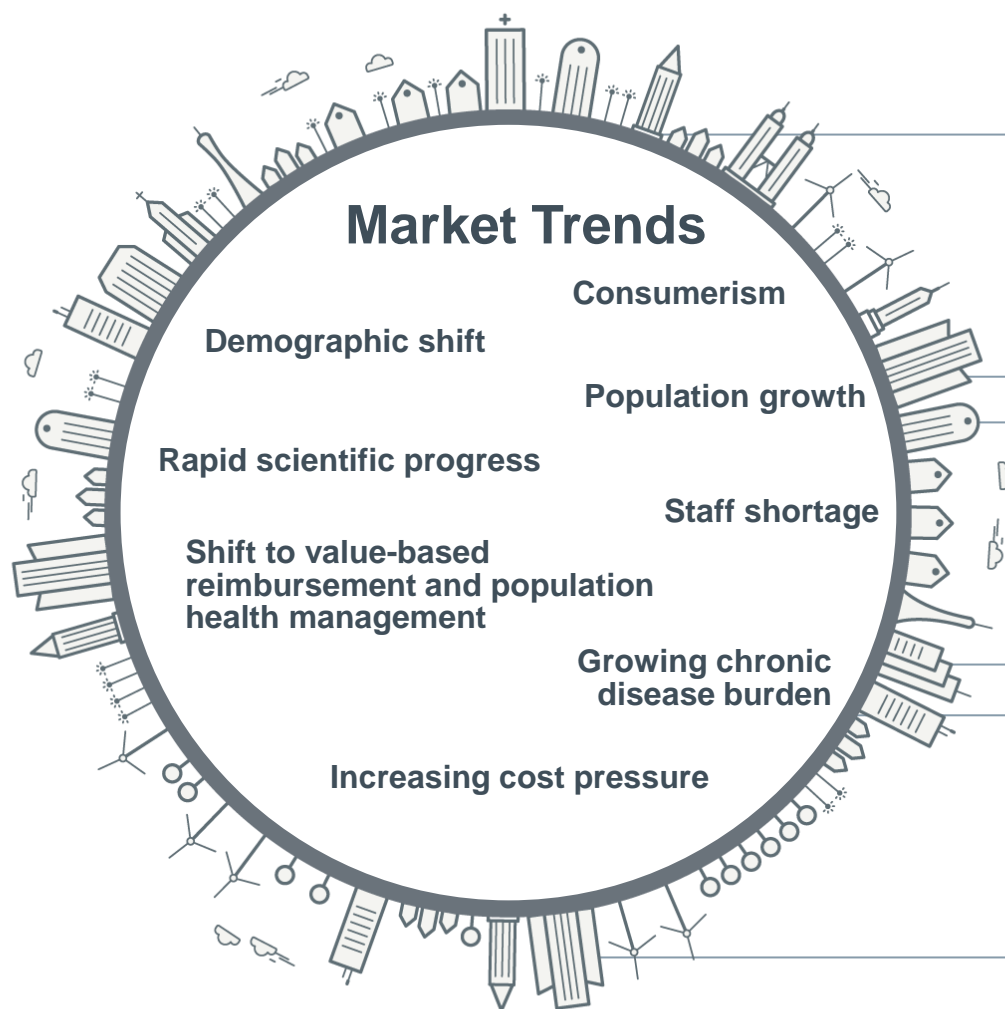
CEO  
Cofounder

About:

Growth  
Services  
MedTech  
Expectations  
Healthcare Industry

Challenges  
Future Company  
Market

These are the major trends you see for the healthcare service industry



**Consolidation**

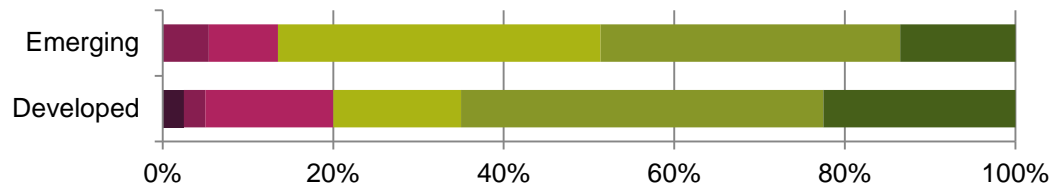
**Private Equity**

**Outsourcing**

# These are the major trends you see for the healthcare service industry

1

## Consolidation

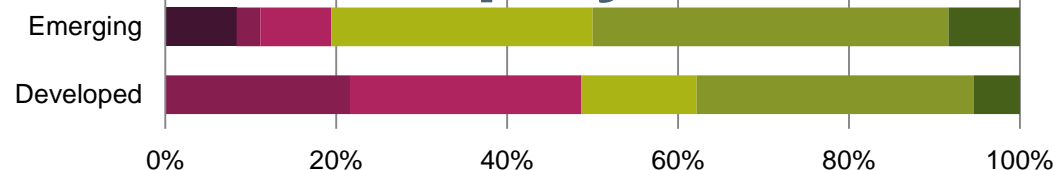


>80%  
all around the world

Expect global consolidation to continue

2

## Private Equity



>80%  
in emerging countries

Expect an increase in private equity

3

## Outsourcing



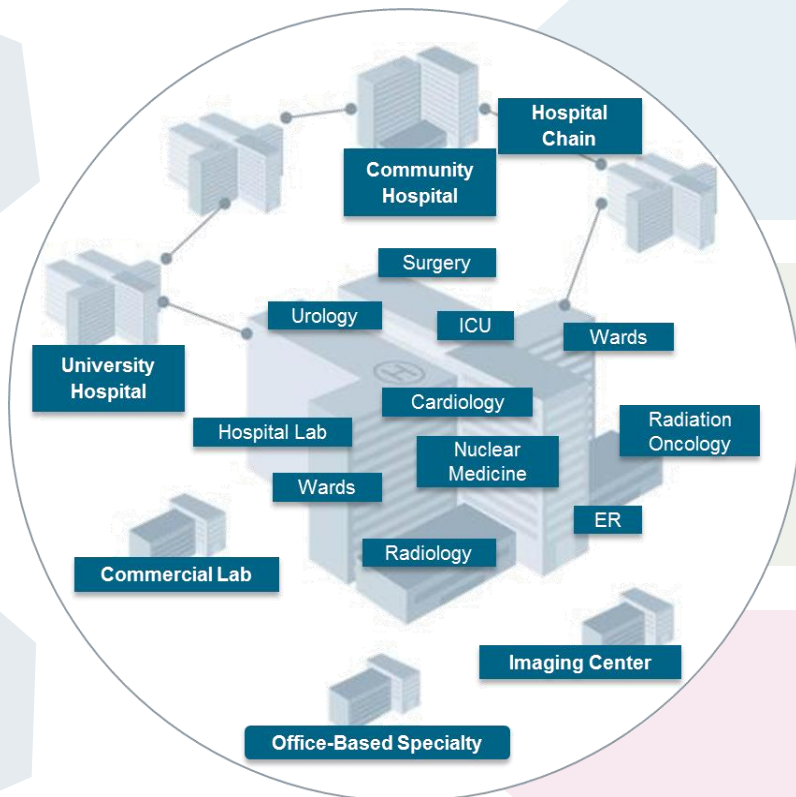
>70%  
in developed countries

Expect further outsourcing of core operations

disagree

agree

# These changes result in a variety of challenges for your business



**Managing and changing corporate culture**



**Reaching new consumers**



**Payers and tariffs**

**Financial**



**Reducing costs**



**Staff recruitment and retention**

**Operational**



**Improving the quality of services**

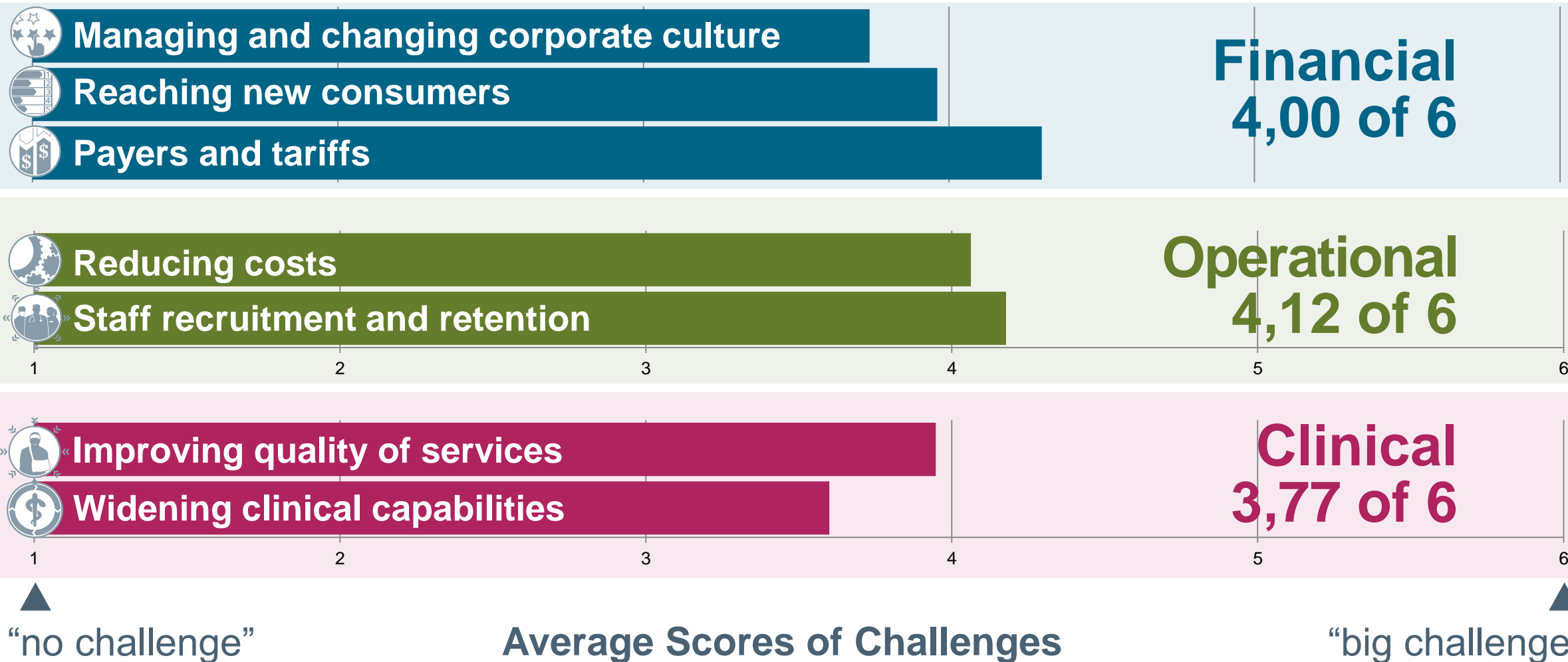


**Widening clinical capabilities**

**Clinical**

# Financial and operational topics challenge you most

What are your company's main challenges in the next five years?



# Executives from emerging and developed countries list upcoming challenges differently – but both rank financial topics highest

Developed Countries Ranking of Challenges

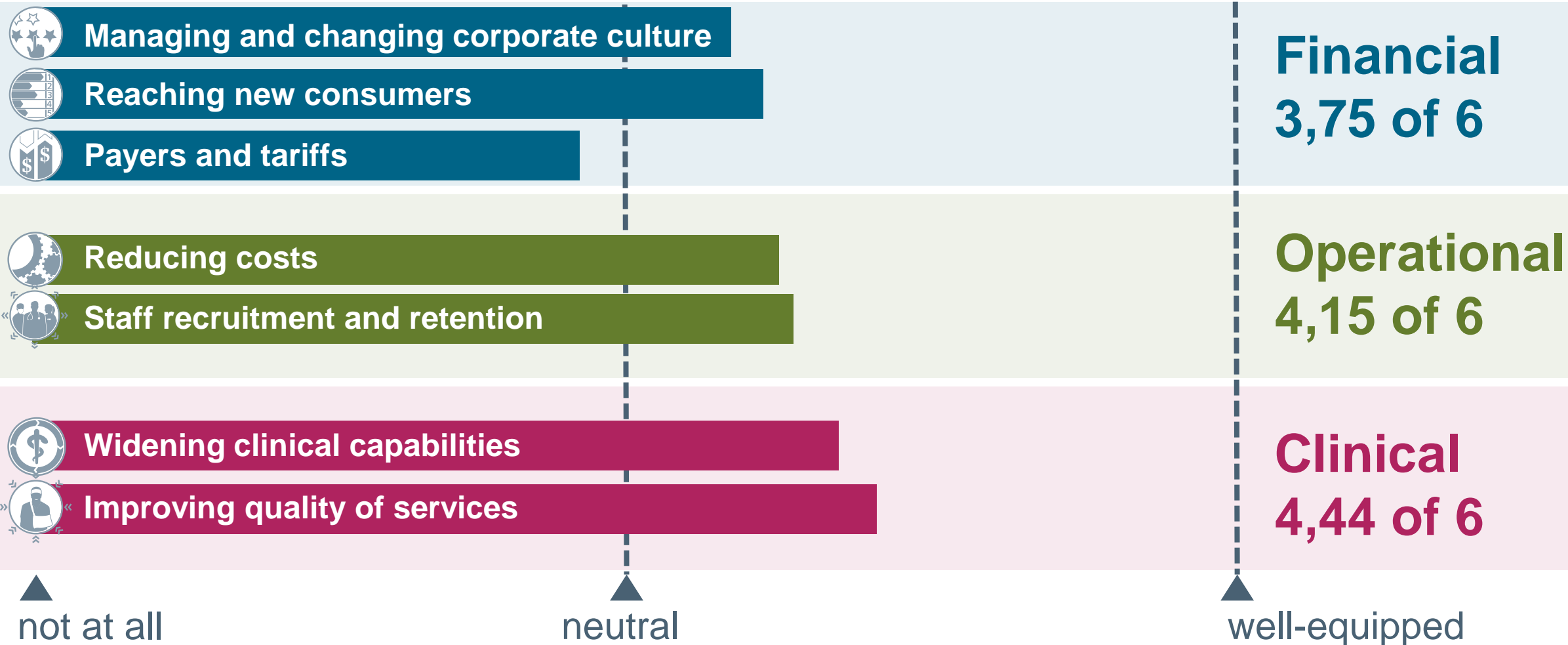


Emerging Countries Ranking of Challenges



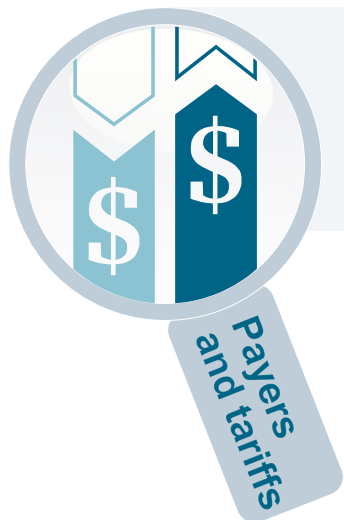
# You are not feeling very well-prepared to meet the upcoming challenges

How well is your company placed to meet these challenges of the next five years?



# Deep dive in your biggest challenge where you are least prepared

## Payers and Tariffs



## How much do you agree with these statements?

Range 1-6: 1 = “do not agree” up to 6 = “fully agree”;  
Scores of 4, 5, and 6 interpreted as “agreed”

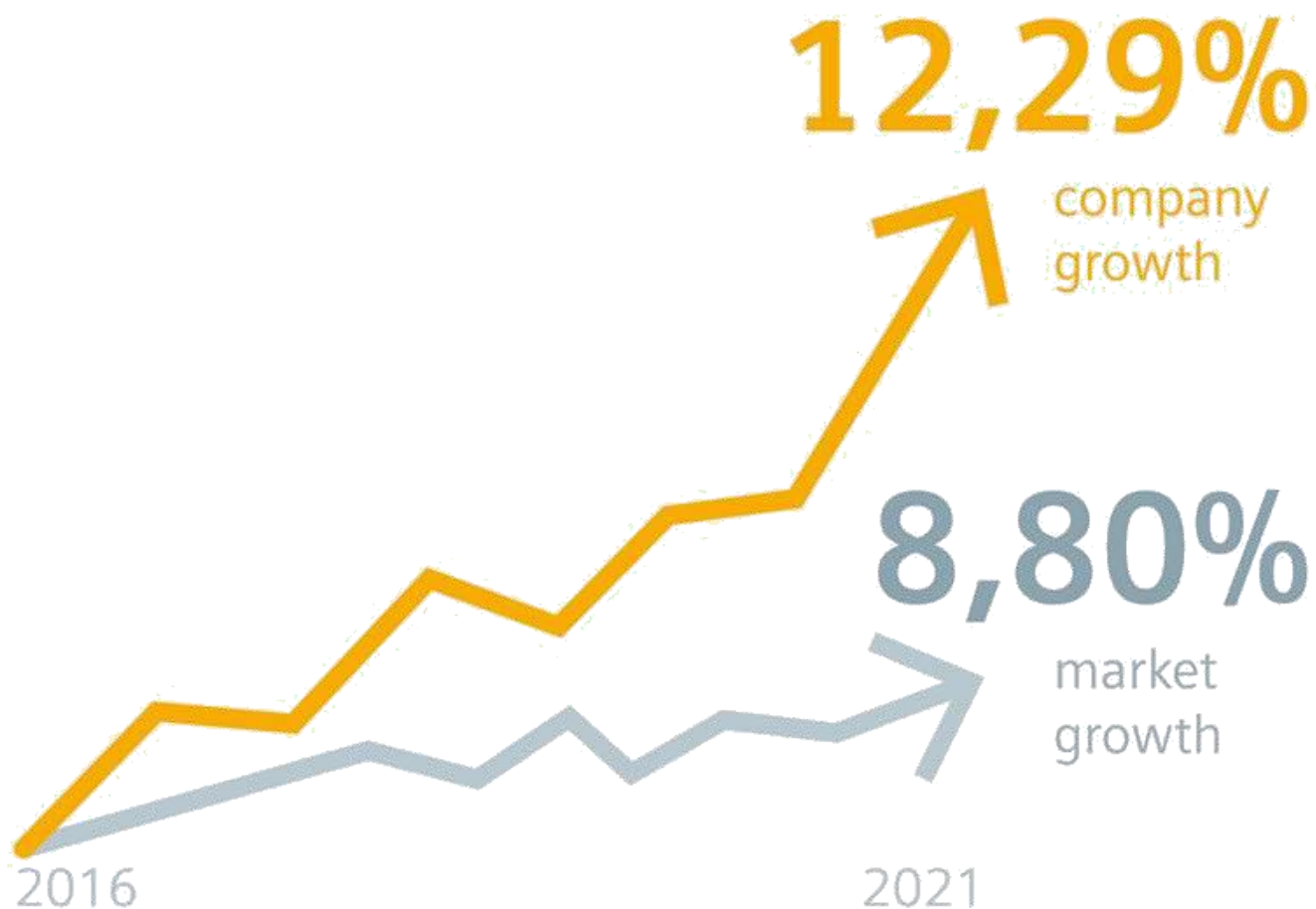


After evaluating the changing market  
we asked for the ultimate question ...



## The market and your company growth

87% expect to grow faster than their markets!



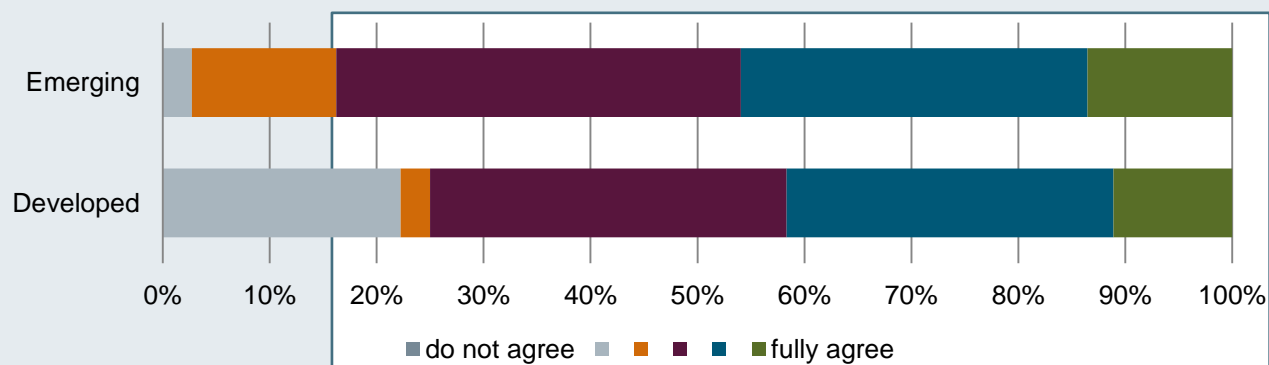
How long  
can you  
sustain such  
an ambitious  
goal?

You see MedTech as a cornerstone for future business success in which it is worth investing



# You see MedTech as a cornerstone for future business success in which it is worth investing

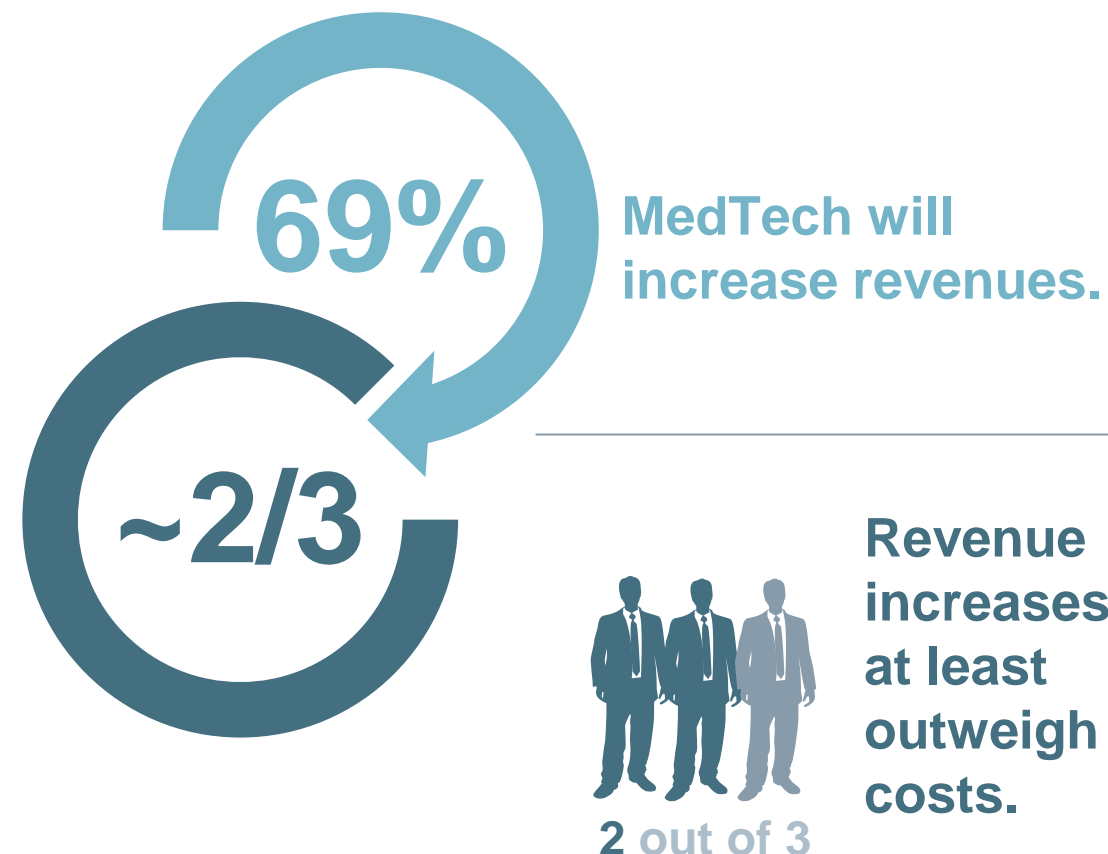
"The new medical technology we buy will be an important differentiator for us"



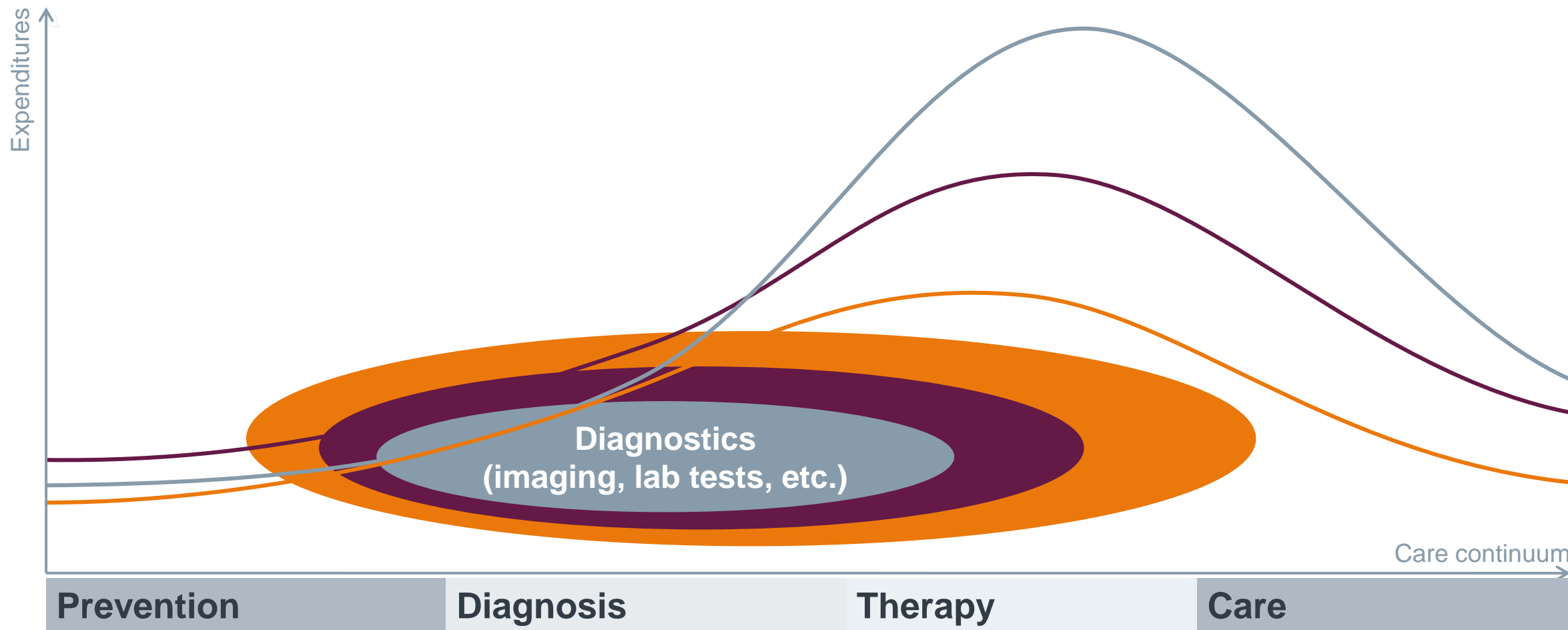
79%

see MedTech as an important differentiator for their business.

Range 1-6: 1 = "do not agree" up to 6 = "fully agree"; scores of 4, 5, and 6 interpreted as "agreed"



# And you are right! Investing in technology does pay off



# Innovative MedTech may help to address your individual pains

## Customer example: Computed Tomography

Diagnostic Imaging

Advanced Therapies

Ultrasound

Laboratory Diagnostics

Point of Care

Services

### Improved acute stroke care at Helsinki University Hospital, Helsinki, Finland

Emergency and neurological department closely connected



**Challenge:** Improve acute stroke care and optimize patient outcomes without increasing costs.



Improve Quality of Care



Increase Efficiency



Improve Profitability

#### Solution:

Processes were implemented to better connect the emergency department with the neurological department. The CT system was moved to the emergency department, because short distances save precious time. Also the therapy-option lysis can be immediately performed while the patient is still in CT.

20  
Ø min

Door-to-needle time

25% €14.4mio

Reduction of stroke mortality  
from 30 to 25 percent

Savings in chronic care costs

The results by Siemens' customers described herein are based on results that were achieved in the customer's unique setting. Since there is no "typical" hospital and many variables exist (e.g. hospital size, case mix, level of IT adoption) there can be no guarantee that other customers will achieve the same results.

# Innovative MedTech may help to address your individual pains

Customer example: Laboratory Diagnostics

Diagnostic Imaging

Advanced Therapies

Ultrasound

Laboratory Diagnostics

Point of Care

Services

## Lab automation at National Health Service (NHS) Tayside, UK

Consolidation of three laboratories



**Challenge:** Integrate three labs into one and optimize the workflow. Consolidate formerly separated biochemistry, immunology, hematology, and hemostasis testing onto a single automation track.



Increase Efficiency



Attract, Retain,  
Develop Workforce



Stay Competitive

### Solution:

Use of data-driven decision making and Siemens consultative expertise to determine the optimal track layout, mix of instruments, and workflow. Intelligently automate workflows in support of a lean, multidisciplinary laboratory that can handle routine and emergency testing on one track.

+20%

Workload

0%

Staff increase

61%

Improved turn-around time  
for add-on tests

The results by Siemens' customers described herein are based on results that were achieved in the customer's unique setting. Since there is no "typical" hospital and many variables exist (e.g. hospital size, case mix, level of IT adoption) there can be no guarantee that other customers will achieve the same results.

Lab and hospital  
executives forecast:\*

12,29%  
company  
growth

8,80%  
market  
growth

2021

2016

**Get further insights:**

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