White Paper

Future-ready healthcare: Strategic advisory for sustainable transformation

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Value Partnerships

Edition #05

Executive Summary

Healthcare transformation requires strategic foresight and resilient partnerships

Today's healthcare providers face mounting pressure: rising operational costs, workforce shortages, digital disruption, and escalating disease burdens in areas like oncology. Navigating this complex environment calls for more than incremental change – it demands end-to-end strategic transformation built on trusted collaboration.

Value Advisory Services works side by side with providers to shape the future of care delivery. Leveraging deep clinical expertise, digital innovation, and a comprehensive understanding of healthcare operations, we support organizations in addressing urgent needs while building long-term resilience. From data-driven performance management to digital strategy and funding advisory, our integrated approach empowers healthcare leaders to act decisively and sustainably.

By addressing critical challenges – from inefficiencies in imaging workflows to the integration of future-ready IT infrastructure – we help unlock measurable value across institutions of all sizes. Whether modernizing cancer care, scaling digital ecosystems, or supporting greenfield development, our partnerships enable providers to remain focused on delivering quality care, while we help streamline the complexity behind the scenes.

Siemens Healthineers is your strategic partner for sustainable healthcare transformation. Through Value Partnerships and expert advisory, we deliver measurable impact from vision to implementation to long-term optimization. Together, we create the foundation for agile, future-ready healthcare systems that can adapt, thrive, and lead.

Contents

The next chapter in healthcare is here

Healthcare has perhaps never faced as many challenges and opportunities as it faces today. Nor has the pace of change, the complexity of the circumstances, or the demand for results ever been so great.

Value Advisory Services stands as a trusted partner in navigating this world, offering a framework for a range of services, strategies, and solutions that can help healthcare providers optimize operations, expand capabilities, and prepare for a strong future.

By partnering with experts who combine deep healthcare knowledge, global insights, and local understanding, providers can drive meaningful, sustainable transformation. From shaping strategic visions to implementing operational improvements, our expertise supports the entire journey – beyond traditional boundaries.

The following content illustrates the current market challenges and opportunities as well as how we can partner to create value for our customers.

Tackling rising healthcare costs and workflow challenges

As populations age and chronic conditions rise, healthcare systems face mounting financial strain. Healthcare spending is reaching unsustainable levels. According to the OECD, average healthcare costs now account for nearly 10% of GDP across member countries. In the U.S., spending is close to 18%.[1]

20–40% of healthcare spending is considered wasted – lost to administrative inefficiencies, redundant diagnostics, underuse of generics, and avoidable hospitalizations.[2] Aging infrastructure and under-optimized facilities further drive-up operational costs.

Layered onto this cost crisis is a global shortage of healthcare professionals. The World Health Organization projects a shortfall of 10 million health workers by 2030.[3]

How we can help you tackle the crisis

At Value Advisory Services, we empower your teams using a comprehensive approach that spans from strategic asset planning to LEAN-based process optimization. By streamlining clinical operations, you can focus on what matters most: delivering quality care.

ActExcell by Siemens Healthineers is a digitally enabled service that combines data driven insights with experienced healthcare advisors to drive a continuous stream of meaningful improvements through digital dashboards and defined KPIs. The service supports customers in better understanding the utilization of existing imaging technology, acting promptly and effectively on available data, and increasing productivity and access to care while improving the patient experience.

ActExcell

Value for you:

- **Discover** previously unseen opportunities in your data
- **Devise** high-impact strategies with experienced healthcare advisors
- **Deploy** solutions that deliver demonstrable, sustainable results
- **Develop** a culture of ongoing value-creation

ActExcell Dashboard

Monitoring daily operational KPIs

Reviewing reporting turnaround times

Delivering value:

Medical University of South Carolina (MUSC)

Charleston, SC, USA
South Carolina's only comprehensive academic medical center
16 hospitals with 2700 beds

Challenge:
The need for greater efficiency in PET/CT scanning

MUSC faced significant challenges, including fragmented processes from rapid growth, outdated technology, and a severe shortage of specialized technologists – issues worsened by the COVID-19 pandemic. Rising PET/CT demand and long appointment backlogs further highlighted the need for greater efficiency, standardization, and operational transparency.

Partnership solution:
ActExcell transformed data and analytics into actionable insights

The Value Advisory Services team oversaw the tailored deployment of the ActExcell dashboard, powered by teamplay Insights. This dashboard collects and analyzes data from a wide range of relevant sources (EHRs, RIS, etc.) and enables identification of potential areas of improvement.

Key Results:

- Median exam duration fell 74%, from 155 minutes to 40 minutes
- Median wait for appointments decreased 40%, from 35 days to 21 days
- Median capacity increased 50%, from 10 exams to 15 exams per day
- 5,000 incremental scans performed vs. baseline rate

Thriving in a digital-first world

Digital health technologies are expected to transform how care is delivered, accessed, and managed as the global market grows from USD 427.24 billion in 2025 to a projected USD 1,500.69 billion by 2032.[4] But realizing this potential will depend on overcoming critical challenges that threaten to slow or derail progress:

Interoperability gaps: Health data remains fragmented across electronic health records (EHRs), wearables, and digital platforms. Nearly 48% of providers identify poor interoperability as a barrier to quality care.[5]

Digital divide: Globally, about 2.6 billion people remain offline, preventing their access to digital health services.[6]

Regulatory and ethical concerns: Data privacy, algorithmic bias, and transparency are growing concerns as sensitive health data is employed in apps and digital therapies.

Despite the challenges, the opportunity is clear: with targeted investments and strong governance, digital health can drive real transformation. Action should focus on building robust data governance and cybersecurity practices, fostering cross-sector collaboration to standardize data. It should also prioritize scaling infra-structure for remote and AI-powered care, while enforcing ethical frameworks that protect patient rights alongside innovation.

How we can help you thrive

Digital strategy and planning: We partner with healthcare leaders to assess their digital maturity and co-create a clear, actionable roadmap for transformation, one that combines innovation with feasibility. We offer:

- IT/Digital strategy and roadmap design
- Digital patient pathway analysis
- AI-driven energy efficiency planning

Digital solution implementation: We implement tailored digital solutions that improve clinical workflows, integrate care networks, and elevate user experience. Every deployment is guided by measurable value, long-term sustainability, and user-centricity. We offer:

- Digital workflow optimization
- Platform and care network integration

IT operations and optimization: We identify optimization measures in technology, workflow, and infrastructure and work to define the future structure of hospital IT departments, ensuring they are strategically positioned to meet both current and future needs. We offer:

- IT service optimization
- IT organizational design
- Workflow digitalization support

Delivering value:

University Hospital Augsburg

Augsburg, Germany
Digital Transformation Project 2021

Challenge:

As part of Germany's Hospital Future Act (KHZG), healthcare institutions faced the pressing need to modernize their digital infrastructure. However, the absence of a clear digital strategy, along with the complexity of the KHZG funding procedures, created significant challenges. Hospitals struggled with uncoordinated funding processes and lacked optimized workflows to effectively introduce new digital tools. Additionally, improving IT security and aligning digital investments with long-term strategic goals became a critical need.

Partnership solution:
Strategic Partnership for Digital Transformation in Healthcare

- Strategic partnership with Siemens Healthineers to support healthcare digital transformation
- Expert advisory in project management, IT security, and KHZG funding coordination
- Implementation support through a centralized PMO and structured digital roadmap
- Development of a sustainable, participative digital strategy tailored to hospital needs

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Key Results:

- Tailored digital transformation support delivered
- Modern digital solutions successfully implemented
- IT security significantly improved
- KHZG funding efficiently managed
- Foundation for future-ready digital infrastructure established

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Meeting the growing challenge in cancer care

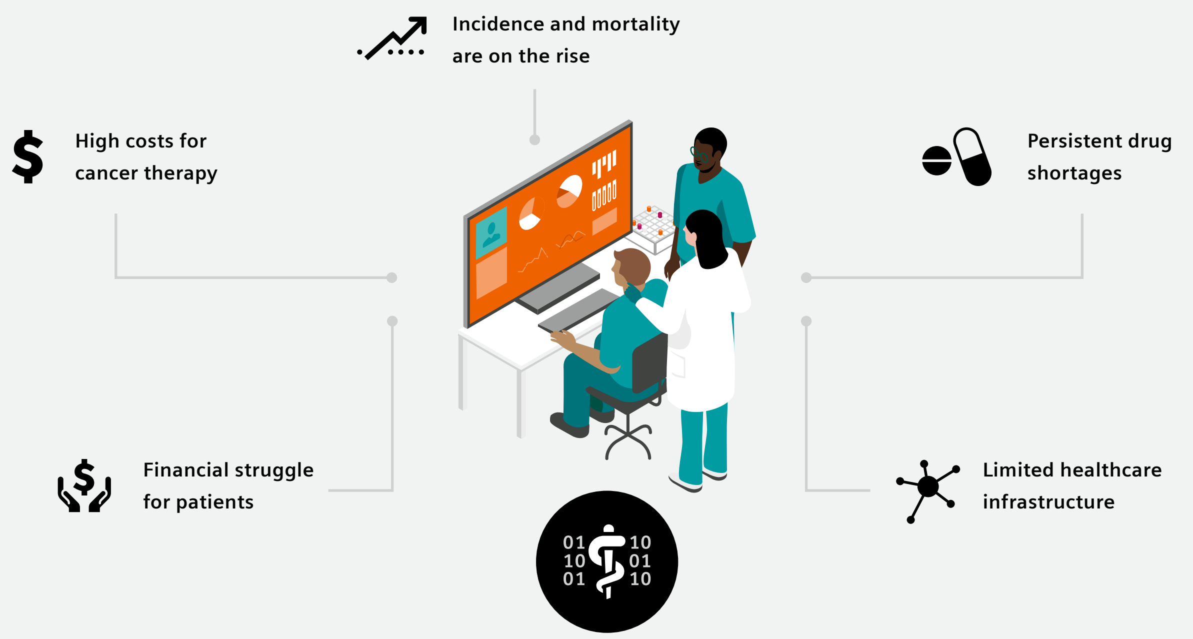
Healthcare is undergoing a major shift – from hospital-centered models to integrated, patient-focused care that emphasizes prevention, long-term wellness, and convenient personalized, digital experiences. At the same time, the challenge that cancer represents continues to grow. Incidence and mortality are expected to climb significantly with 12 million new cases projected annually over the next 25 years. Global spending on cancer medications is forecast to reach $409 billion by 2028.[7]

While treatment options continue to advance, access remains uneven. Many patients face financial hardship, limited healthcare infrastructure, and persistent drug shortages, with the high cost of cancer therapies making care unaffordable or inaccessible for too many, further widening health inequities.

How we can help you meet the challenge

At Value Advisory Services, we are committed to empowering Oncology Centers of Excellence to deliver state-of-the-art, transformative patient care. We understand the complex challenges facing cancer programs and their patients, and we partner with you to advance high-quality oncology services within your community.

Our team supports you across the entire care continuum as you navigate evolving oncology care models. Leveraging proprietary tools, we provide deep insights into market dynamics, competitive positioning, and growth opportunities at the tumor-specific level. Through our comprehensive programmatic offerings – from enhancing patient access to strengthening ancillary support services – we help you build and sustain a truly integrated Oncology Center of Excellence.



Delivering value:

HMI Group

Malaysia and Singapore
2 sites in Malaysia, 1 site in Singapore

Challenge:
Meeting increasing volume and clinical demands across specialties

Connecting innovative companies in health tech is a large part of what HMI does. Its goals are to revolutionize patient outcomes and design patient-centric and outcome-oriented health journeys. HMI wanted to increase clinical capabilities to serve rising regional healthcare demands, especially in oncology. In addition, it wished to optimize operations and costs to improve efficiency and effectiveness.

Partnership solution:
A wholesale reassessment of operations

- Added innovative technology by creating and leveraging a technology roadmap to support achievement of clinical goals while managing costs
- Co-created solutions for capacity optimization
- Created a staff education program
- Provided marketing support

Key Results:

- Ongoing KPI monitoring and analysis are in place to ensure continuous improvement
- Centers of excellence have been established in cancer, cardiovascular care, and neurology

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Uncovering new and diversified growth opportunities

As public systems grapple with capacity and funding constraints, private sector innovators are increasingly stepping in to fill the gaps. From AI-driven diagnostics and telehealth platforms to mobile clinics and affordable insurance models, these players are reimagining how, where, and to whom care is delivered.

Opportunity for strategic partnerships: In today's world, public institutions and traditional healthcare providers must rethink how they structure partnerships. Whether it's co-investing in digital infrastructure, entering joint ventures for new facilities, or building integrated care networks, the path forward lies in bold collaboration.

Market redefinition through private capital: Private equity and venture capital deal value in healthcare technology rose by approximately 50% year-over-year, reaching USD 15.62 billion in 2024 .[8] They have been focused on scalable, tech-enabled solutions to reach underserved populations. Meanwhile, non-traditional entrants—from consumer brands to logistics companies—are investing in healthcare infrastructure, particularly in emerging markets, where the need for accessible and affordable care is urgent.

For private hospitals, payers, and governments, partnering with these new entrants presents a major opportunity to scale reach, improve outcomes, and address persistent inequities. But doing so requires clear strategies, data-driven planning, and operational excellence.

How we can help you channel growth

We can help you unlock the full potential of your healthcare business with our comprehensive suite of solutions, including M&A guidance, greenfield planning, and activation advisory. And it's all backed by data-driven advice and expert insights for a seamless journey from vision to action.

Our mergers, acquisitions, and partnerships practice provides comprehensive transaction advisory support to global businesses, guiding them through the intricacies of long-term strategic transactions and partnerships. We provide hands-on, differentiated guidance, while collaborating closely with our clients and finance services to ensure success.

Meanwhile, our greenfield advisory experts support you in putting your vision of a new healthcare facility into practice. Our team supports you in defining the right market entry strategy, building a bankable business case, and developing a thorough feasibility study.

With activation advisory, we empower your institution to excel in a changing healthcare landscape. The cross-functional perspective encompassing human, technology, and processes, enables you to make informed decisions, ensuring success in medical, economic, and organizational planning.

Delivering value:

TVM Capital Healthcare

Dubai, UAE
Strategic greenfield support project 2023

Challenge:
The need for expertise in greenfield development

- Facing changing demographics and lifestyle habits on disease patterns
- Experiencing system-specific policy changes regarding care organization and reimbursement
- Undergoing difficulties in provider selection and market dynamics

Partnership solution:
Strategic, multi-faceted support

The Value Advisory Services team gathered first-hand insights on operations and policy shifts, helped build a strong in-house base of clinicians and scientists, and positioned the organization at the forefront of emerging trends in prevention, diagnostics, and treatment. Our strategic expertise also guided the development of greenfield healthcare projects in the Gulf region, enabling sustainable, future-ready care delivery.

Value added:

- Projection of total patient volumes for defined treatment spectrum over a horizon of 10-15 years
- In depth assessment of cost and operational efficiency through shifting treatment spectrum to outpatient care
- Identification and evaluation of potential market disruptions to proposed business and operating model

Conclusion:

Partnering for sustainable healthcare transformation

Whether your organization aims to accelerate digital transformation, expand access to care, or improve efficiency amid resource constraints, your chance of success is bound to improve when you work with a partner that understands your world in its entirety – clinical, operational, and financial.

This is where Value Advisory Services comes in. Whether you work with us via a Value Partnership or on any other terms, you'll gain far more than a provider of solutions. Instead you'll secure an ally committed to delivering value for you every step of the way however long the journey.

Get in contact:

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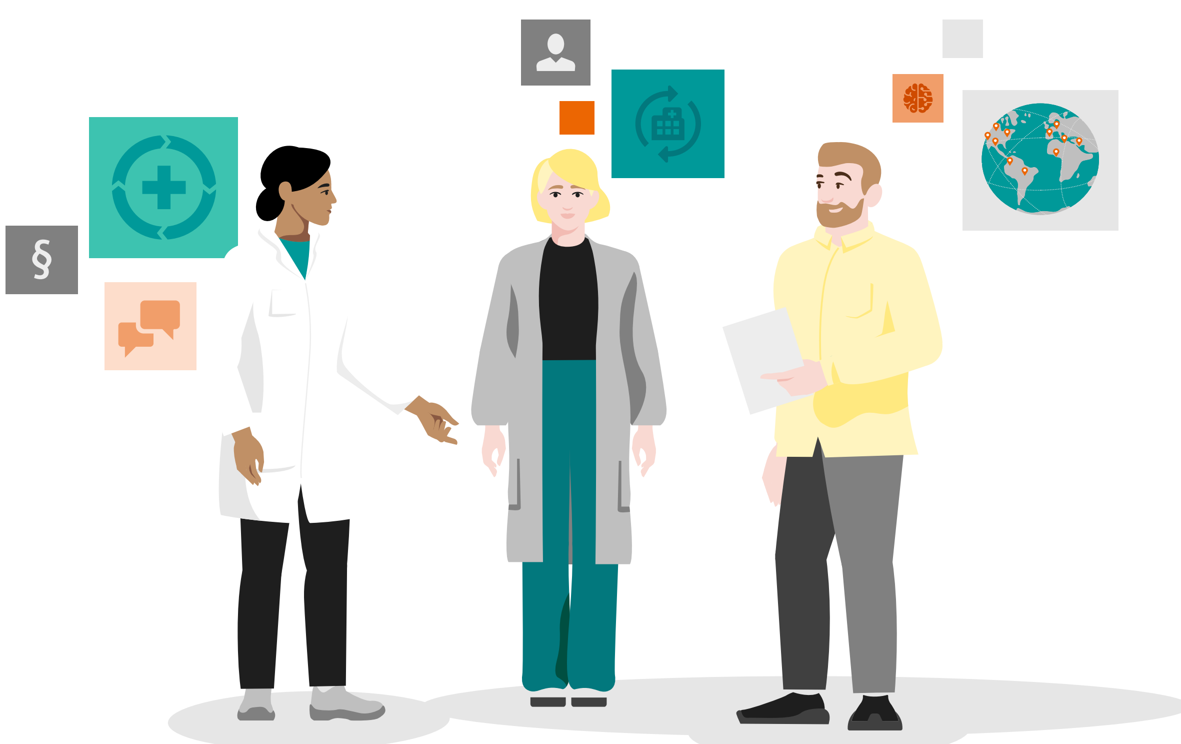
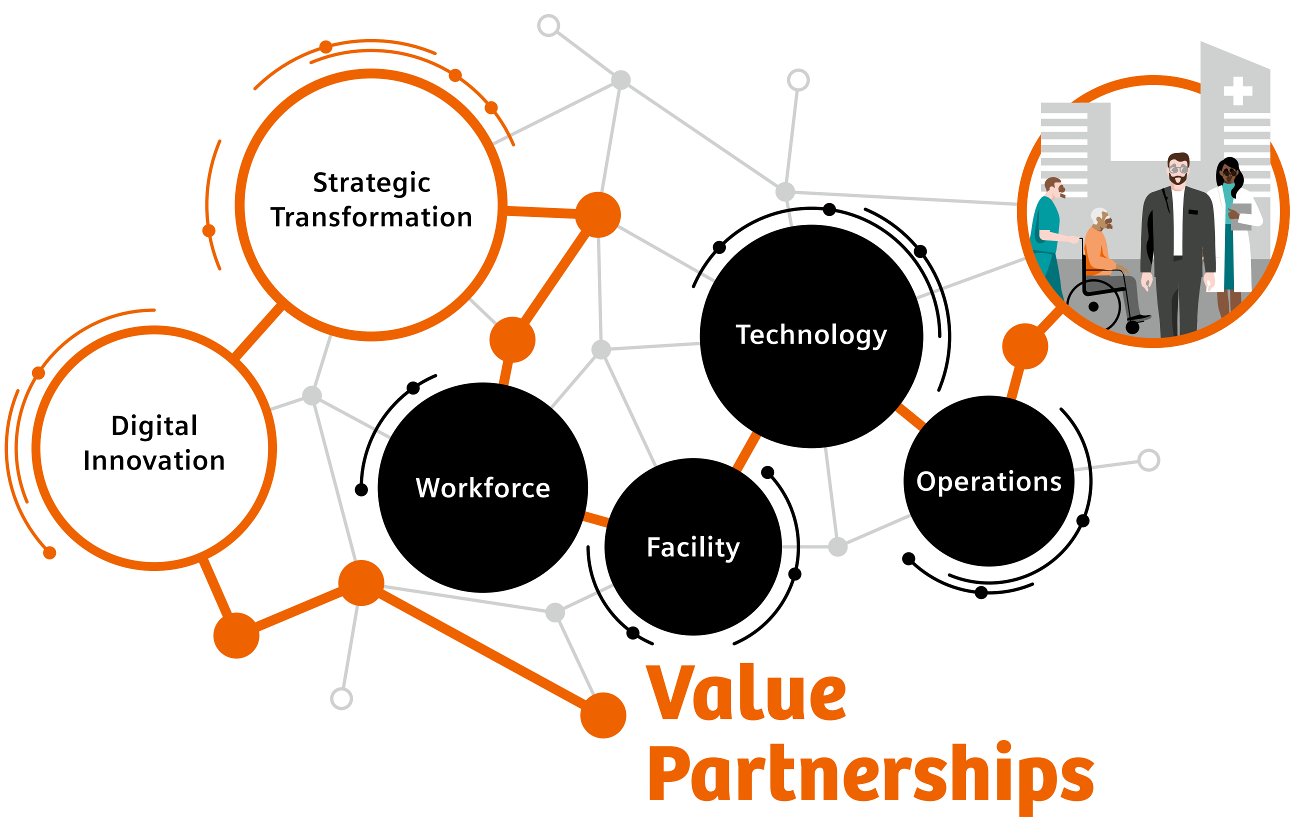


About Value Partnerships

Siemens Healthineers Value Partnerships are long-term, performance-oriented, collaborative engagements. We bring a combination of clinical insight, medical technology innovation, strategic vision, implementation expertise, and operational excellence to the table for you. As trusted partners, we help you formulate and achieve your strategic goals, increasing enterprise-wide value.

Value Partnerships drive value across your entire enterprise with focus on four domains: Technology, Operations, Workforce and Facility. Furthermore, together we enable breakthroughs through holistic and transformative initiatives such as Strategic Transformation and Digital Innovation.



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