

INSPIRATION

VISION

CONCEPT

Operating Model

In the “Trusted Health Ecosystems” project we are creating a concept and a product vision for a national health platform of the future. This text is part of the overall concept which is published at www.trusted-health-ecosystems.org.

Successfully establishing health ecosystems – models from abroad

A health ecosystem, such as the one envisaged by the “Trusted Health Ecosystems” project, must fulfill several requirements if it is to bring value to stakeholders within a health system. International models have demonstrated that a successful operational model combines the active participation and coordination among involved actors with common technical standards.

Digital ecosystems have transformed traditional business models across various industries, generating added value for customers and market participants. For instance, e-commerce-platform providers and prospective buyers can now directly interact, which leads to more efficient transactions. Open ecosystems of this type could also play a role in digital healthcare. Key characteristics of such ecosystems are:

A multi-stakeholder network. An open ecosystem brings together different actors with varying interests. In healthcare, these actors may encompass patients, health service providers, payers and providers of products and services.

Co-creation. The development of information, products and services does not rest solely with the platform operator. Third parties or stakeholders “on the platform” also contribute to this process. This principle serves as the basis for “app stores” provided by mobile phone companies, where external developers offer downloadable applications.

Self-reinforcing effects. Value drives adoption, and platform activity attracts new users. This mechanism is well-known from social networks, which can rapidly expand once a critical mass of users is reached. Similar self-reinforcing effects could occur within a digital healthcare ecosystem. As more citizens use a digital health service, its relevance for healthcare service providers increases, and vice versa.

Key considerations in designing health ecosystems: Four success factors from an operating model perspective

Active participation of stakeholders constitutes a pivotal aspect of a successful ecosystem. An additional element is proper organizational design to unlock the ecosystem's full potential. Here, four factors assume a central role, as illustrated by examples from other countries:

1. End-to-end patient “pathways”

From a user perspective, the seamless integration of stakeholders and services is critical: Patient pathways need to be designed end-to-end and thus ensure the harmonious orchestration of multiple services in a user-friendly way, e.g., a journey encompassing appointment booking, (tele-)consultations, e-prescriptions and medication delivery. Foundational “enabler applications,” such as electronic patient records, facilitate seamless care by maintaining consistent data across systems without necessitating changes.

Case example: The Health Village in Finland

Developed by Finnish university clinics, the Health Village comprises virtual hubs for a variety of care categories, including emergency care, rehabilitation and mental health. These hubs are brought together as required based on a patient's diagnosis. Empowered by physician referrals, participants can access digital health services such as video-based consultations and self-help programs via smartphones. This innovative approach has introduced more than 400 distinct care pathways to complement on-site healthcare.

2. User centricity

To achieve widespread adoption, the offerings within the ecosystem must cater to user needs. User centricity means involving ecosystem participants in the development and enhancement of services, thus fostering stronger user loyalty.

Case example: “Sundhed.dk” in Denmark

Sundhed.dk, the Danish health portal, actively involves patients in developing and improving e-health applications through a dedicated “user panel.” Through methods like focus groups, interviews and questionnaires, targeted user feedback is collected. These insights, including feedback on existing solutions and requests for new functionalities, contribute to refining the user experience and ultimately benefiting patients.

3. Governance to involve stakeholders

Effective governance mechanisms are essential for the functionality of an ecosystem. Typically, the ecosystem operator assumes the role of orchestrator, overseeing a framework for demand- and solution-oriented interactions.

Case example: The Well healthcare platform in Switzerland

Initially founded by health insurers and healthcare providers, the Well platform now incorporates physician networks and other collaborators. The integration of various actors is orchestrated by the Well AG.

4. Technical interoperability

Successful ecosystems facilitate seamless information exchange between stakeholders through standardized interfaces. These interfaces are typically established by the ecosystem orchestrator and are based on international standards. For example, the Fast Healthcare Interoperability Resource (FHIR) standard creates a basis for national and cross-border data exchanges in the healthcare sector.

Case example: FHIR in Israel

Israel relies on the FHIR standard within the healthcare domain, enhancing the usability of health data through a mix of incentives and requirements. This includes the Israeli Health Maintenance Organizations (which operate like integrated insurers, service providers and hospital operators), research institutes, startups, and additional healthcare providers. These organizations all benefit from improved health data exchange.

The future of open healthcare ecosystems

Open healthcare ecosystems possess the potential to better connect healthcare stakeholders with citizens. Such ecosystems can build up on existing structures: For example, a Germany's national health infrastructure known as "Telematikinfrastruktur." Electronic patient records and e-prescriptions can serve as foundational elements for health data exchange within an open healthcare ecosystem.

Building successful open ecosystems demands a multi-faceted approach: User-centric concepts, effective governance mechanisms and standards are needed. To achieve this, an organization can be established to develop the ecosystem's strategic direction, oversee orchestration and provide stakeholders and third-party providers with participation opportunities.



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