

**Health Care Forum 2014
A global business in flux****September 17th 2014
The Seaport Hotel, Boston, Mass**

Health care is at a turning point around the world—and it is being disrupted in more ways than one. Unprecedented global demand due to demographic changes and disease patterns, coupled with rising costs and the proliferation of technology, has brought on a revolution for transparency, new business models and efficiency.

All these changes have paved the way for unconventional market entrants to rise to the challenge of delivering health care. This is posing significant challenges to incumbent players, but also disrupting the health care ecosystem as a whole. A health care company is no longer defined only as a doctor's office, hospital or insurer. At the same time, the industry is becoming more globalised, as companies work across borders. Today, incumbents must step outside the comfort zone of how they do business and innovate beyond their traditional processes in order to survive.

The Economist Events' second annual Health Care Forum will address the best business strategies for growth in this new era of disruption. Together with our global Economist Group editors, established business leaders and entrepreneurs, we will tackle wholesale market reform, innovation in care delivery and products and global investment opportunities. How must health care businesses evolve to serve patients as a result of these transformational global shifts? Where are the cutting-edge hospitals dedicating their resources? What can we learn from foreign models?

Event chairs:

Dr. Vivek Muthu, Healthcare director, The Economist Intelligence Unit
Charles Goddard, Editorial director, Asia-pacific, The Economist Intelligence Unit
Roger McShane, Public-policy correspondent, *The Economist*

Confirmed Speakers Include:

Anders Wold, Global president and chief executive, GE Healthcare Ultrasound
Dave Mason, Senior vice-president, RelayHealth Financial, McKesson
Leah Binder, President and chief executive, The Leapfrog Group
Dr. Stephen Ondra, Senior vice-president and chief medical officer, Health Care Service Corporation
Chris Gordon, Managing director, Bain Capital
Jonathan Bush, Chairman and chief executive, Athenahealth
Dr. Anita Goel, Chairman and chief executive, Nanobiosym
Jim Greiner, President, iTriage
Harold D. Miller, President and chief executive, Center for Healthcare Quality and Payment Reform
Paula Wilson, President and chief executive, Joint Commission Resources / Joint Commission International
Charles W. Sorenson, MD, President and chief executive, Intermountain Healthcare
Tim Murphy, Chief executive, Beacon Health Strategies
Mitch Rothschild, Chief executive, Vitals
Unity Stoakes, Co-founder and president, StartUp Health
Kim DiBella-Farber, Chief operating officer, director of quality & operations, Child Guidance Center of Southern CT
Walter Capone, President, Multiple Myeloma Research Foundation (MMRF)
Bruce Broussard, Chief executive, Humana
Peter Berman, Professor of practice of global health systems and economics, Harvard School of Public Health
Albert Bourla, Group president of vaccines, oncology and consumer healthcare, Pfizer
Sandra L. Fenwick, President and chief executive, Boston Children's Hospital
Helena Foulkes, President, CVS Pharmacy
Niven Narain, Co-founder, president and chief technology officer, Berg Health
David Hare, Chief executive, NHS Partners Network
Saul Kornik, Chief executive, Africa Health Placements (AHP)
Victor J. Dzau, MD, President, Institute of Medicine
Osnat Levtzion-Korach, Chief executive, Hadassah Mount Scopus University Hospital, Hadassah Medical Center
Donald Bialek, MD, Chief medical officer, iVantage Health Analytics / Galloway Advisory
Sean Morrison, Director, National Palliative Care Research Center and director, Hertzberg Palliative Care Institute, Icahn School of Medicine at Mount Sinai
Chip Davis, Executive vice-president, advocacy & member relations, Pharmaceutical Research and Manufacturers of America (PhRMA)
Alex M. Azar II, President, Lilly USA, LLC
Anne Klibanski, MD, Chief academic officer, Partners HealthCare
Sam Nussbaum, Chief medical officer and executive vice president, Wellpoint, Inc.

Programme:

8:30am **Chairperson's Opening Remarks**
Charles Goddard, Editorial director, Asia-pacific, The Economist Intelligence Unit

8:45am **Keynote panel address: A global business in flux**

The globalisation of health care has provided opportunities for many organisations to rapidly develop their products and expand their network of customers. But with this more global focus within the health care ecosystem, we also need to realise that there are also a number of important economic and public health concerns. This opening session will address the critical question facing American health care companies today--How must hospitals and other businesses evolve to serve patients in the global new care economy? This session will be conducted in two parts. Part one will look at the trends shaping the ecosystem for health care globally and part two will explore how these trends are impacting companies in the business of health care today.

Part one:

Peter Berman, Professor of practice of global health systems and economics, Harvard School of Public Health

Dr. Victor J. Dzau, MD, President, Institute of Medicine

Moderator: Charles Goddard, Editorial director, Asia-pacific, The Economist Intelligence Unit

Part two:

Jim Greiner, President, iTriage

Charles W. Sorenson, MD, President and chief executive, Intermountain Healthcare

Bruce Broussard, Chief executive, Humana

Moderator: Dr. Vivek Muthu, Healthcare director, The Economist Intelligence Unit

9:45 am **The globalisation of health care**

Major health companies are now global health care companies. All participants in the health care "value chain" are looking beyond traditional markets and exploring global opportunities. Mergers, acquisitions, international partnerships and satellite operations are now commonplace in health care, as ways to offer better care to more people at a competitive price. In a dynamic, talk-show style format, this session will also look at answering questions such as:

- How are strategies adapting from market to market.
- What regions present the most opportune areas of expansion?

- What lessons do the models developing in some countries offer?

Anders Wold, Global president and chief executive, GE Healthcare Ultrasound
Paula Wilson, President and chief executive, Joint Commission Resources / Joint Commission International

Albert Bourla, Group president of vaccines, oncology and consumer healthcare, Pfizer
Sean Morrison, Director, National Palliative Care Research Center and director, Hertzberg Palliative Care Institute, Icahn School of Medicine at Mount Sinai

Moderator: Charles Goddard, Editorial director, Asia-pacific, The Economist Intelligence Unit

10:30 am **Case study: Learning from foreign models**

“Leapfrogging” in some developing markets with limited legacy infrastructure and systems, is coming into play naturally rather than by disruption. This panel will examine a variety of models from across the globe. We will discuss: What valuable lessons can the US learn from international health care systems? How are they financed and deliver care? Are they doing a better job or do they have a different job to do?

David Hare, Chief executive, NHS Partners Network
Saul Kornik, Chief executive, Africa Health Placements (AHP)
Osnat Levzion-Korach, Chief executive, Hadassah Mount Scopus University Hospital, Hadassah Medical Center

Moderator: Dr. Vivek Muthu, Healthcare director, The Economist Intelligence Unit

11:15 am Networking break

11:45 am **Finding market gaps**

Unconventional market entrants are rising to the challenge of eradicating the gaps in the market. Individually these entrants are typically high risk endeavors, but in aggregate, pose significant challenges to incumbent players and to the longstanding structure of the health care ecosystem as a whole. This session will examine answers to questions such as:

- As the health care field becomes more crowded, where are the gaps in US health care services and products today?
- How should these gaps be filled?
- What is the business opportunity of tomorrow?
- What solutions could scale globally?

Walter Capone, President and chief executive, Multiple Myeloma Research Foundation (MMRF)

Mitch Rothschild, Chief executive, Vitals

Niven Narain, Co-founder, president and chief technology officer, Berg Health

Moderator: Charles Goddard, Editorial director, Asia-pacific, The Economist Intelligence

12:30 pm

Oxford Style Debate: Has Obamacare failed?

Jonathan Bush, Chairman and chief executive, athenahealth

Donald Bialek, MD, Chief medical officer, iVantage Health Analytics / Galloway Advisory

Moderator: Roger McShane, Public-policy correspondent, *The Economist*

1:15 pm

Lunch & Learn Sponsored by Eli Lilly

The rise of the Patient – Re-imagining the health care ecosystem

The revolution in information technology and connectivity, coupled with structural reforms fueled by the Affordable Care Act, has empowered patients to be knowledgeable consumers and active decision-makers when it comes to their health. Despite these unprecedented advances, much of the healthcare ecosystem remains disjointed and cumbersome for patients to navigate, and there are many opportunities to connect processes across businesses, innovate and reduce costs. How can companies in the health care ecosystem unlock the potential of a patient-centered model? This session will explore how payers, providers, pharmaceutical companies and policy-makers are changing their approaches to business as a result of this transformation in health care. How can all parties work together to help the patient succeed and improve patient outcomes?

Alex M. Azar II, President, Lilly USA, LLC

Anne Klibanski, MD, Chief academic officer, Partners HealthCare

Sam Nussbaum, Chief medical officer and executive vice-president, Wellpoint, Inc.

Moderator: Dr. Vivek Muthu, Healthcare director, The Economist Intelligence Unit

3:00 pm

Price Transparency

Price transparency remains rare in health care, but with employer and consumer demand increasing, hospitals and other care providers may soon have to accept the practice. How can hospitals prepare for this future, and how might price transparency end up a benefit? What are the risks of price transparency? Should patients only think of care in terms of price?

Dave Mason, Senior vice-president, RelayHealth Financial, McKesson

Leah Binder, President and chief executive, The Leapfrog Group

Dr. Stephen Ondra, Senior vice-president and chief medical officer, Health Care Service Corporation

Harold D. Miller, President and chief executive, Center for Healthcare Quality and Payment

Reform

Moderator: Roger McShane, Public-policy correspondent, *The Economist*

3:45 pm

Product innovation

Across the world, health care has become a focal point for innovators. The need for innovation, coupled with advances in health technologies and data management, can help facilitate new diagnostic and treatment options. However, these same advances are likely to increase overall costs, prompting widespread efforts by public and private health care providers and insurers to contain expenditure by restructuring care delivery models and promoting more efficient use of resources. Wearable technologies, personalized medicine, and data-based care standardization are just a few examples that have the potential to revolutionise how people stay and get healthy. It is a sweet spot for incubators, startups and large enterprises. In this interactive, talk-show style session we will examine a variety of areas for innovation in the health care ecosystem. We will look at what the health care products and needs of the future are, and what companies and products hedge funds, private equity investors and venture capitalists are most excited about and why.

Chris Gordon, Managing director, Bain Capital

Dr. Anita Goel, Chairman and chief executive, Nanobiosym

Unity Stoakes, Co-founder and president, StartUp Health

Chip Davis, Executive vice president, advocacy & member relations, Pharmaceutical Research and Manufacturers of America (PhRMA)

Moderator: Roger McShane, Public-policy correspondent, *The Economist*

4:30 pm

Afternoon networking break

5:00 pm

Hospitals and health care of the future

Low debt. New technology. High efficiency. Enough personnel. What does the hospital of the future look like? What does it succeed in, and how can the hospital of today get there? What are the cutting-edge hospitals today, and how are their administrators succeeding? What does the health industry of tomorrow look like? How is the industry collaborating? Where are improvements needed first? What can we do today to make the future health care industry more innovative and effective?

Tim Murphy, Chief executive, Beacon Health Strategies

Kim DiBella-Farber, Chief operating officer, director of quality & operations, Child Guidance Center of Southern CT

Sandra L. Fenwick, President and chief executive, Boston Children's Hospital

Helena Foulkes, President, CVS Pharmacy

Moderator: Dr. Vivek Muthu, Healthcare director, The Economist Intelligence Unit

5:45 pm

Chairperson Closing Remarks:

Charles Goddard, Editorial director, Asia-pacific, The Economist Intelligence

6:00 pm

Networking reception