



OUR
VISION AND PRIORITIES
FOR THE FUTURE OF
HEALTH



BUSINESSat**OECD**

THE **B**USINESS AND **I**NDUSTRY **A**DVISORY **C**OMMITTEE

**We envision a health system
in which care is fully integrated,
ground-breaking innovation is embraced,
balanced nutrition and active lifestyles
are promoted, and investments
are encouraged for the benefit of
healthy and productive societies.**

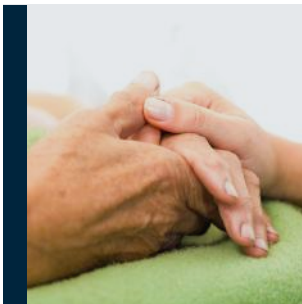


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Our Vision for the Future of Health

We believe that policies must holistically incorporate broad-based economic growth, innovation, and health. We recommend that the OECD prioritizes actions in four areas – Integrating Care, Embracing Innovation, Promoting Balanced Nutrition and Active Lifestyles, and Investing in a Healthier Future.



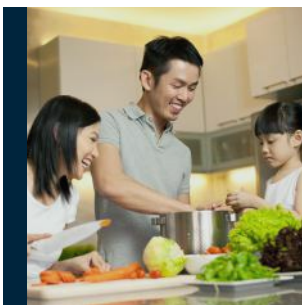
1. Integrating Care

Better coordination will make 21st century care truly people-centered in the. Future health policies will need to blur the boundaries between hospital, primary, community and social care, and other settings for health.



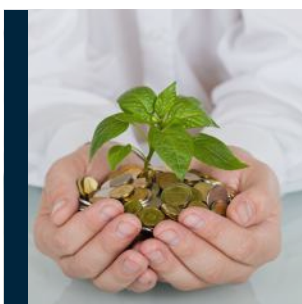
2. Embracing Innovation

Ground-breaking innovations that bring value to our societies will reach people more rapidly. Healthcare systems will better measure, monitor, and incentivize research and development activities. They need to embrace new technologies and medicines, and deliver innovations to those that will benefit.



3. Promoting Balanced Nutrition and Active Lifestyles

Health policies must encourage consumers to adopt balanced diets and live active lifestyles, including through improving nutrition and increasing health literacy.



4. Investing in a Healthier Future

Investments in healthcare provide the necessary foundation for healthy populations, enabling sustainable, inclusive, and knowledge-based economic growth.



Our Vision for the Future of Health

Healthcare systems in OECD countries have been a major driver of well-being and economic growth. However, they need to adapt to 21st century challenges and anticipate future trends.

Multiple and complex challenges must be overcome with inter-sectoral solutions. Over the next 20 years, the cost of Non-Communicable Diseases (NCDs) could more than double—to USD 30 trillion—with the cost of care threatening to push millions of people into poverty.¹ Drug-resistant infections have the potential to cause a level of economic damage similar to—and potentially worse than—that caused by the 2008 financial crisis.² At the same time, conservative estimates predict that 20% of total health expenditure is either spent ineffectively or wasted.³

In the past, innovative, multi-stakeholder health approaches have succeeded in addressing health challenges. Political will, scientific advancement, and multi-stakeholder investments secured a polio-free world at a time when it was the world's most feared disease. These initiatives have also taken place at regional levels: Oklahoma City adopted a multifaceted nutrition and physical activity strategy that engaged 52,017 inhabitants to collectively lose 1,000,000 pounds in weight – potentially saving millions in future healthcare costs.

Health Ministers from OECD and key partner countries will convene in Paris in January 2017 to address the next generation of health reforms. This paper outlines Business at OECD's (BIAC) Vision for the Future of Health and identifies priority actions for the OECD and its member governments across four areas: **(1) Integrating Care, (2) Embracing Innovation, (3) Promoting Balanced Nutrition and Active Lifestyles, and (4) Investing in a Healthier Future.**

We believe that policies must holistically incorporate broad-based economic growth, sustainable development, education, and innovation—both as key drivers and as preconditions for health and well-being. Intersectoral linkages need to be considerably stronger to achieve greater policy coherence. Business is a partner in designing the cross-functional health solutions of tomorrow. We are ready to deepen our dialogue⁴ with OECD and governments on progress.

1 WEF (2011): The Global Economic Burden of Non-communicable Diseases; World Economic Forum, Geneva.

2 OECD (2015): AMR in G7 Countries and Beyond: Economic Issues, Policies and Options for Action; OECD Publishing, Paris.

3 Berwick and Hackbarth (2012): Eliminating Waste in US Health Care: JAMA, Vol. 307, No. 14, pp. 1513-1516. Visser et al., (2012): Kwaliteit als medicijn, aanpak voor betere zorg en lagere kosten. [Quality as medicine approach for better care and lower costs]; Booz & Co.

4 For example, see the May 2016 "Business Forum on Innovation, Health and Well-Being", <http://biac.org/wp-content/uploads/2016/07/BIAC-Forum-Innovation-Health-Well-Being-Highlights1.pdf>.

1. Integrating Care

Better coordination will make care truly people-centered in the 21st century. Future health policies will need to blur the boundaries between hospital, primary, community and social care.

Health and social systems were designed for different demographics, a different epidemiology and different lifestyles. While the share of population aged over 65 amounted to less than 10% in 1960, it doubled to almost 20% in 2015, and is projected to rise to almost 30% in 2060.¹ Moreover, in most OECD countries, people with chronic conditions represent 80% of burden of disease, and people with multiple chronic conditions represent over 50% of burden of disease.²

Combined with budgetary constraints, health systems are now struggling to meet these demographic and epidemiological challenges. Fragmentation in these systems means information is not shared efficiently across service providers, and citizens and patients are often expected to integrate services themselves.

Overburdened patients may have difficulty communicating complex care needs and medical histories across healthcare services. This configuration may ultimately increase healthcare costs by relying on unscheduled or emergency care services. Fragmented and underdeveloped data collection on health outcomes makes it difficult to compare the value of different care interventions and prioritize decision making across care providers.

To provide better and safer care efficiently, delivery mechanisms should be transformed to take a more person-centered approach that encompasses health and social care. We could work towards a future where the patient will receive coordinated care that focuses on her needs rather than having to navigate between different healthcare providers on her own.

Recommendations to the OECD and governments:

1. **Support** the use of multi-year funding, stakeholder engagement and education programs to overcome barriers in care organization, finance, technology, regulatory and governance.
2. **Develop** multi-stakeholder collaboration — including new organizational and financial models, and communications platforms—to facilitate implementation of shared care pathways, disease management, and improved health literacy.
3. **Promote** interoperability with support of semantic and technical standards, standardized measurements of health outcomes including patient reported outcomes.
4. **Stimulate** development of integrated care models through specific initiatives, including sharing and replicating good practice and scaling up successful implementation.
5. **Secure** political leadership and develop national and regional evidence-based roadmaps for the transformation to integrated care delivery systems that better address people's needs.

¹ OECD (2016) Health at a Glance: Europe 2016. OECD Publishing, Paris.

² Anderson, G (2011): For 50 Years OECD Countries have continually adapted to Changing Burdens of Disease; the latest challenge is People with Multiple Chronic Conditions, OECD Publishing, Paris.

2. Embracing Innovation

Ground-breaking innovations that bring value to our societies will reach people more rapidly. Healthcare systems will better measure, monitor, and incentivize research and development activities. They need to embrace new technologies and medicines, and deliver innovations.

We are now in the middle of a new golden age of innovation in health systems driven by growing knowledge of the human genome, the advent of biological medicines, the digitization of healthcare, advancement in material sciences and big data analytics. This builds on the contributions from medical technologies, pharmaceuticals, medical devices and health IT to unprecedented progress for human health during the last decades. Patients will benefit from personalized treatments that will be tailored for their specific conditions and/or genetic makeup, and will monitor and manage their own health using mobile apps and electronic health records.

Further to contributing to an increase in productivity, these new innovations will also help make healthcare and social care systems more sustainable through more efficient use of resources. The optimal practice of personalized medicine will help reduce many of the inefficiencies apparent in the current healthcare system. Awareness of genetic risk factors will encourage preventive care and early diagnosis. Much of its value will come from preventing advanced disease states and reducing ineffective treatment. Soon, innovative technologies could potentially cure diseases such as hemophilia through gene therapy. To enable these technologies, future health systems will also need to consider ways how we evaluate these advances. Public stakeholders should collaborate to ensure new innovations can reach citizens.

Digital innovation brings huge potential, and investments are needed to improve health data collection. Using electronic health record data for secondary purposes will be critical, together with ensuring health data validity and reliability. Building public confidence in information security and developing information campaigns that make the public case for sharing health data and address public concerns around the misuse of health data will also be vital. This implies not only investing in physical and digital security assets but also in digital security measures that safeguard health data confidentiality, establishing standard operating procedures for secure data management and training staff to apply them appropriately.

Recommendations to the OECD and governments:

1. **Encourage** the research and development of innovation through market-based incentives to bring value to patients, healthcare systems and societies.
2. **Monitor** the advance of research and development in order to plan for, and assess, the impact of new technologies, and facilitate regulatory changes that evaluate these innovations allowing for closer connections between regulatory and reimbursement guidance.
3. **Measure** the value of new technologies throughout the lifecycle, through the collection of real world data on health outcomes.
4. **Ensure** rapid uptake of new technologies in healthcare systems, including through innovative payment models, early-access schemes and regulatory reviews.
5. **Implement** the OECD's Recommendation on Health Data Governance to utilize the full value of health data for research, delivery of integrated care, and value-based payment models

3. Promoting Balanced Nutrition and Active Lifestyles

Health policies must encourage consumers to adopt balanced diets and lead active lifestyles including through improved nutrition and health literacy.

Nearly 30% of the global population was overweight or obese in 2014, and the McKinsey Global Institute estimates the global economic impact of obesity and associated non-communicable diseases (NCDs) is approximately USD 2 trillion. Improving nutrition and increasing physical activity are key components of reducing this economic burden, and we share the goal of helping people everywhere achieve and maintain balanced diets and active lifestyles. Real progress is already underway to increase health literacy, improve nutrition, and promote physical activity. Constructive and transparent partnerships across sectors can further strengthen these efforts and improve health outcomes.

Maximizing health communication tools and harnessing technology to deliver messages in new ways will provide people with information that they can quickly and constantly access, interpret, and understand to meet their health and nutrition needs. Comprehensive, science-based approaches, including communication campaigns, can shift norms and encourage people to change their behaviors.

Business has actively undertaken efforts to improve nutrition and promote healthy lifestyles. For example, key public health objectives, such as salt reduction strategies, directly result from constructive engagement between health authorities and industry. Multi-stakeholder initiatives should build on industry progress and commitments in:

- Providing consumers with innovative and diverse products, including through reformulation;
- Labeling products with fact-based and easy-to-understand nutrition information, accompanied by robust educational efforts to help consumers use this information to make informed dietary choices;
- Reducing the impact of marketing on children; and
- Promoting balanced diets and healthy lifestyles.

Recommendations to the OECD and governments:

1. **Improve** the evidence base regarding cost-effective interventions and behavioral economics, so that industry and governments better understand how to identify those factors most influencing healthy diets and lifestyles, improving nutrition literacy, implementing cost-effective interventions, and measuring success in changing consumer behavior.
2. **Develop** best practice on health literacy and communication/technology initiatives that help consumers obtain, interpret and understand information and services to make informed dietary/health and lifestyle choices.
3. **Advance** best practice models for comprehensive approaches that foster healthy diets, lifestyles, and sustainable food systems. Effective nutrition interventions must take into account total dietary consumption as well as lifestyle factors. Furthermore, policies aimed at improving diets should align with other priorities across the food chain (e.g. improving food safety; reducing food waste) and ultimately support sustainable development.

Investing in a Healthier Future

4. Investing in a Healthier Future

Investments in healthcare provide the necessary foundation for healthy populations, enabling sustainable, inclusive, and knowledge-based economic growth.

Investing in health means investing in society's future. In 2015, global leaders made commitments to meet specific targets under the UN Sustainable Development Goals that will ensure healthy lives and promote well-being for everyone, regardless of age.

In the future, we will need significant investment in innovations across the fields of biotechnology, nanotechnology, information technology, innovative medicines, and related technologies to improve disease management and treatment. We need to shift our perspective on who represents the 'health workforce', to reflect the varied professionals that operate across an illness/wellbeing spectrum. This workforce could also include physical activity professionals and other specialists promoting positive health. Governments could explore how physical activity and workplace wellbeing strategies could act as a proactive investment for boosting people's health. Business has engaged in several initiatives to increase the number of people involved in physical activity, and governments could encourage such initiatives through partnerships and project support. Moreover, workplace wellbeing strategies offer a return on investment from both an economic and social perspective.

Furthermore, international organizations such as the World Bank state that health is a direct source of human welfare and an instrument for raising income levels. Economics Nobel Prize winner Robert Fogel, found, in his long-term study of Britain, that 50% of the country's growth between 1790 and 1980 was due to good health. An article from The Lancet estimates that 24% of the growth in income in low and middle-income countries during the 2000-2011 period resulted from health improvements.¹ Even a single extra year of life expectancy raises a country's per capita GDP by about 4%²; another study estimates that a 10% rise in life expectancy at birth is associated with a 0.3 and 0.4% rise in economic growth.³ Governments across agencies should recognize and act on the importance of continuing to invest in healthcare to achieve sustainable development and economic growth. Business stands ready to meet global health challenges and to work with governments to ensure that the right policy frameworks and incentives are in place to drive continued investment in healthcare.

Recommendations to the OECD and governments:

1. **Explore** government and public-private initiatives promoting proactive investments and how they can contribute best to boosting people's health.
2. **Evaluate** the impact of investments in science - including bio- and nanotechnologies - as a source of human welfare and as an instrument for raising income levels.
3. **Study** the investments in medicines as one of the most cost-effective healthcare interventions.
4. **Develop** best practice models for investment in health-related technologies.
5. **Examine** the incentives and effects of workplace wellbeing programs on the health of employees and the surrounding communities.

1 Jamison, Summers et al. (2013): Global health 2035: a world converging within a generation; Lancet, Elsevier, Amsterdam.

2 Bloom, Canning, and Sevilla (2004): The Effect of Health on Economic Growth: A Production Function Approach; World Development, Vol. 32, No 1., pp 1-13.

3 WHO, CMH (2001): Macroeconomics and health: Investing in health for economic development; Geneva.

Business at OECD

Business at OECD (BIAC) speaks for business at the OECD. Established in 1962, we stand for policies that enable businesses of all sizes to contribute to growth, economic development, and prosperity. Through Business at OECD, national business and employers federations and their members provide expertise to the OECD and governments for competitive economies, better business, and better lives.

Who to contact for information

We encourage companies that are interested in contributing to the strategic discussions concerning Business at OECD's (BIAC) activities on OECD health policy to contact their respective national Business at OECD member organization, or Business at OECD associate experts. For OECD and government stakeholders, we invite you to consult the Business at OECD Secretariat in case you have any questions.

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