

# The Present and Future of Hospital Care in Europe

## 46th German Hospital Day

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**President**

**European Association of Hospital Managers**



EUROPEAN ASSOCIATION  
OF HOSPITAL MANAGERS

C H A

N G E



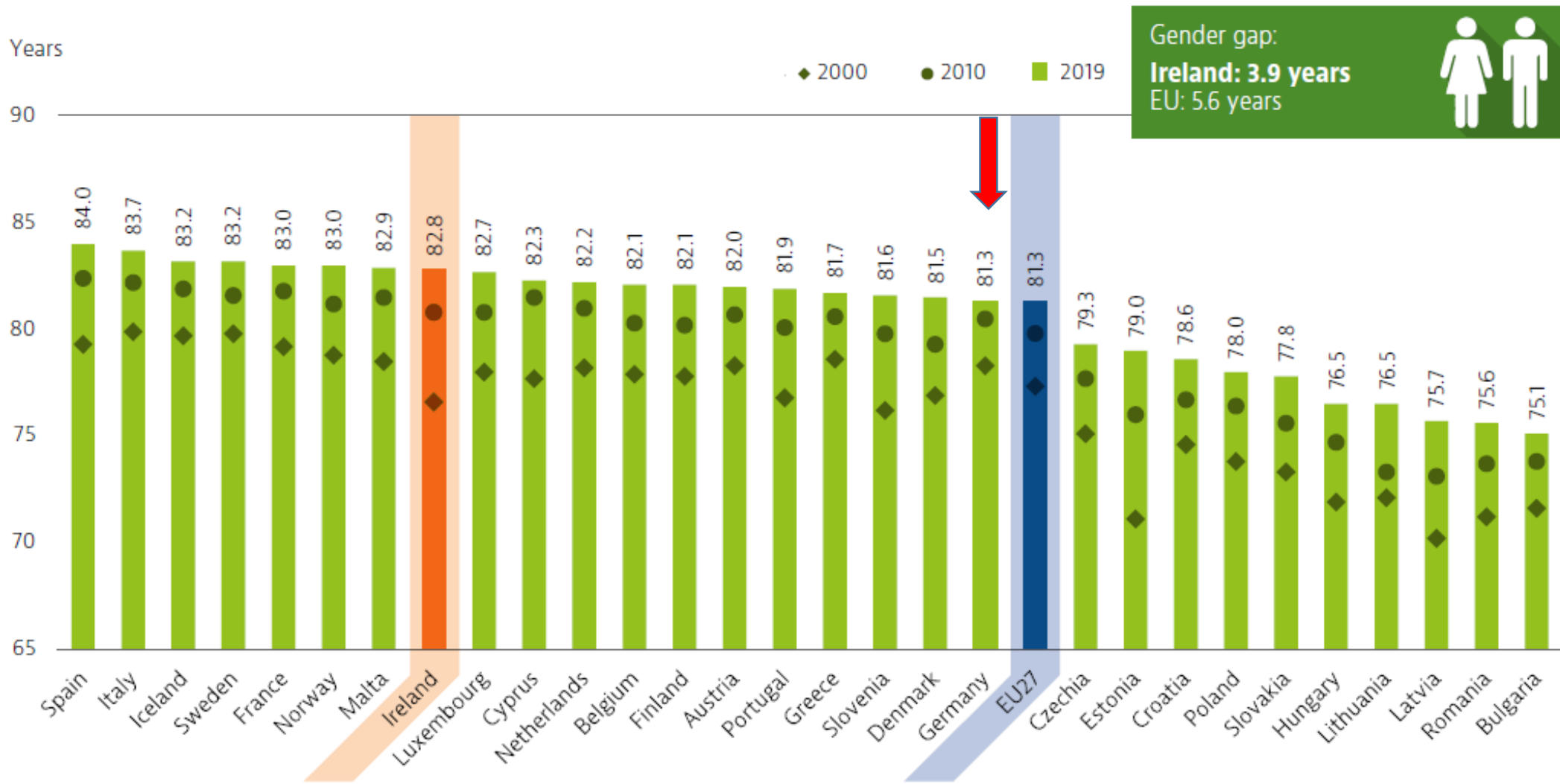
A low-angle photograph of a city street with tall buildings on either side. In the center, a yellow diamond-shaped sign is mounted on a black post. The sign has a black border and the text "POST-COVID RECOVERY" in bold, black, sans-serif capital letters. The sky is a pale, clear blue.

**POST-COVID  
RECOVERY**



hospital waiting list

# Ageing Population



Note: The EU average is weighted.  
Source: Eurostat Database.



RETAIN  
REQUIRE  
RETAIN



**Physician, Germany**

“Unfortunately, in many cases, administrative activities have started to consume a significant part of a doctor's day, sometimes even up to 50%. This approach of burdening doctors, who are already expensive resources, with extensive administrative duties is organizational madness. The system often takes advantage of doctors' dedication to their work, adding more tasks until they reach their limits.”





# Cyber attack paralyzes Israeli hospital's computer systems

Mayanei Hayeshua Medical Center in Bnei Brak is dealing with a ransomware attack that damaged and shut down administrative computer systems on Tuesday. Following the attack, some treatments were stopped and the emergency room is referring patients to other hospitals

Omer Kabir 11:53, 08.08.23



CYBER SECURITY NEWS 2 MIN READ

## Cyber Attack Crippled Hospital Systems Disrupting Healthcare Services Across Several U.S. States

ALICIA HOPE · AUGUST 8, 2023



NEWS 7 MAR 2023

## Ransomware Attack Against Barcelona Hospital Disrupts Operations

EUROPEAN[views]

NEWS AND VIEWS FROM EVERY CORNER OF THE EU

NEWS & ANALYSIS

OPINION

60% Increase in Cyberattacks on Irish Healthcare System image by Michael Geiger/Wikimedia Commons

29/05/2023 - By [Antoinette Tyrrell](#)

MEMBER STATE MONITOR

## 60% Increase in Cyberattacks on Irish Healthcare System

## Medical data hacked from 10m Australians begins to appear on dark web

After hack allegedly carried out by Russians, details of abortions, drug addiction, mental health issues and alcoholism emerge online

## Hackers claim breach is the 'biggest ever' in NHS history

by [Vish Gain](#)

11 JUL 2023 [SAVE ARTICLE](#)

# Impact of War





# Climate Change

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## Climate Footprint:

- ✓ If the health sector were a country, it would be **the fifth-largest emitter on the planet**: Worldwide healthcare's climate footprint is equivalent to 4.4% of global net emissions (Germany; 5.2%), equivalent to annual emissions from 514 coal-fired power plants; more emissions than the global aviation industry.
- ✓ **Energy consumption** is at the heart of emissions (>50%); average energy consumption of a hospital bed in Europe is equivalent to 3-4 single-family houses.
- ✓ **71% of emissions** are derived from the **healthcare supply chain** through the production, transport and disposal of goods and services, such as pharmaceuticals/chemicals, food, medical devices, instruments, e.g. single-use.

# What's Happening?

## Business norms and regulation on sustainability (CSR/ESG)

- ✓ Hospitals as business companies are increasingly faced with „compliance plus“, „must-have standards“ and legal obligations on environmental conduct in the healthcare market.
- ✓ Today, sustainability management and reporting is not yet wide-spread in healthcare sector: In Germany in 2022, 1/3 of hospitals had sustainability a topic of clinic management, 25% have position/unit responsible; 12% publish sustainability reports.
- ✓ Large private hospital operators (e.g. Helios) have started implementing sustainability management/reporting in response to the EU non-financial reporting directive (NFRD 2014).
- ✓ Sustainability reporting will become mandatory from 2024 on for the majority of hospitals in Europe with the EU CSRD; eligibility criteria „two out of three“: employees: >250; turnover: >40 Mio €; balance sheet total: >20 Mio €  
→ Regulation pushes transformation in hospitals towards sustainability



A large, bold, orange letter 'V' is centered above the 'Volatility' section.

## Volatility

Refers to the speed of change in an industry. In industries experiencing high volatility, changes occur frequently and quickly.

A large, bold, yellow letter 'U' is centered above the 'Uncertainty' section.

## Uncertainty

Refers to the extent in which future events and outcomes can confidently be predicted. Industries experiencing high uncertainty, forecasting the future is extremely challenging.

A large, bold, blue letter 'C' is centered above the 'Complexity' section.

## Complexity

Refers to the number of factors that need to be considered in decision-making. The more varied the factors are, and the more interconnected the factors are, the higher the complexity becomes.

A large, bold, dark blue letter 'A' is centered above the 'Ambiguity' section.

## Ambiguity

Refers to a lack of clarity about how to interpret an event. In industries in which ambiguity is high, information is often incomplete, contradicting, or too inaccurate to draw clear understanding.



FUTURE

PRESENT

PAST



# Key Design Principles for the Hospital of the Future



## Care Beyond Walls

Use physical sites and co-located teams to deliver and extend care beyond the four walls of facilities



## Expanded / Hybrid Care Teams

Structure teams with capabilities to deliver whole person care across channels



## Flexible Space

Challenge orthodoxies around space and build flexible space that can be repurposed over multiple time horizons



## Automation & AI

Build plans to leverage automation and AI for clinical and non-clinical tasks



## Hyper-Connectivity and Resiliency

Create a resilient, tech-enabled hyper collaborative environment powered by 5G, cloud and collaboration tools



## System Level vs. Local Management

Build capabilities that allow for system level management of service lines, optimizing for capacity and delivery channels



## Smart Spaces

Equip spaces with smart technology to enhance and streamline care delivery



## Standardization

Apply consistency among partners, vendors and solutions across the system



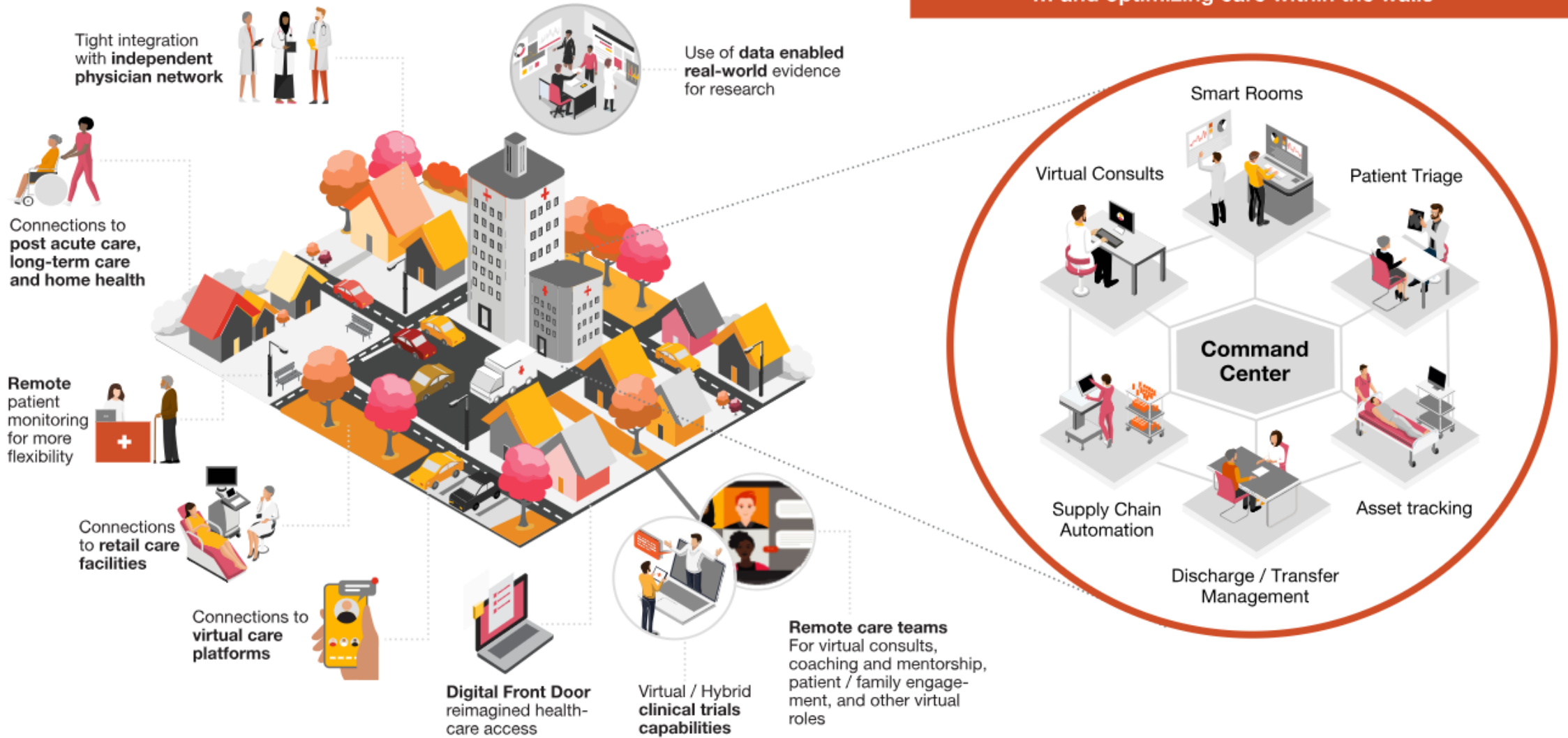
## Environmental, Social, and Governance (ESG) Standard and Equity

Remain mindful of the footprint and impact on climate

# The facilities of the future will need to optimize care within and beyond the walls.

A physical site coordinating care delivery outside the walls ...

... and optimizing care within the walls



A semi-transparent circular graphic containing three smiling business professionals: a man on the left, a woman in the center, and a man on the right. They are all dressed in professional attire. The background of the entire image is a blurred office setting with windows.

# LEADERSHIP IN A VUCA WORLD

# Danke für Ihre Aufmerksamkeit



## THANKS FOR LISTENING



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