



ecosystem

The Intelligent Enterprise

# The Future of HEALTHCARE

APRIL 2023





# Overview

Healthcare has transformed rapidly in the last few years – processes have become more agile; clinicians, administrative staff, and patients have changed their views on how healthcare can and should be delivered; and there is a greater reliance on technology today.

Despite challenges such as healthcare inequality and limited access to care for underserved populations, the future of Healthcare looks promising.

**We will see continued advancements in technology, increased collaboration between healthcare providers and patients, and a clear shift in focus on preventative care.**



# Drivers of Evolution in Healthcare



## A PATIENT-LED APPROACH

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People have taken charge of their health outcomes and become digital-savvy. They want to access healthcare at their own pace and convenience – even in the comforts of their homes. The traditional ‘patient’ has become a ‘consumer of healthcare’.



## VALUE-BASED HEALTHCARE

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As health expenditures continue to rise, healthcare systems and individual provider organisations are focusing on delivering better clinical outcomes and patient experiences, while optimising costs.



## SKILLS SHORTAGE

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Healthcare leaders continue to fear that skills shortage and burnouts are weakening healthcare systems. This continues to be a challenge as providers struggle with the longer-term impacts of the pandemic.



# Key HealthTech Trends for 2023 & Beyond

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## **A DIGITAL-FIRST APPROACH**

Many healthcare providers will consider replacing physical interactions between clinicians and patients by digital interactions, wherever possible. This will gain momentum beyond use cases such as chronic disease management, aging-in-place practices, mental health, neonatal care and post-operative check-ups.



## **CONSUMERISATION**

Healthtech such as wearables and medical devices, will become easier to use and consumer-friendly. Even for clinicians, the focus will be on tech that does not interfere with workflows and can be accessed seamlessly when required.



## **PRECISION MEDICINE**

There has been a significant rise in the research and use of genomics, and AI-led analysis of the contribution of the environment and lifestyle on health outcomes. This will help predict disease burden on economies and determine personalised care protocols.



# Healthcare Provider Priorities are Shifting

Organisations are looking beyond compliance to systemic, cross-organisational innovations



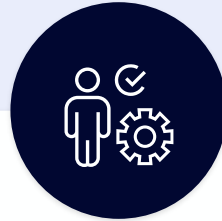
**53%**

Innovation



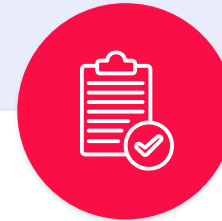
**33%**

Cost  
reduction



**29%**

Enhancing  
clinician  
productivity



**-43%**

Compliance  
with  
regulations



**-43%**

Increasing  
business agility

 *Increased Focus since 2022*

 *Decreased Focus since 2022*





Health Innovation

# Empowering Clinicians

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**Clinicians need to buy-in to the benefits of collaborative care – and technology can empower them.**

[South Australia Health](#) has launched a remote monitoring service to provide better healthcare for high-risk patients in rural and regional areas. Patients are given a monitoring kit and tablet to measure their vital signs, upload data securely via a website, and access specialist consultations around the clock. This allows clinicians to improve clinical outcomes of patients, virtually.

[Tan Tock Seng Hospital in Singapore](#) has implemented automation and digital technology to tackle workforce shortages and improve patient care quality and staff well-being. The hospital has introduced a "smart ward" with RFID patient tags and ehealth records that monitor real-time patient data, allowing for greater efficiency and coordination. The aim is to reduce the workload, while also facilitating upskilling opportunities.



Health Innovation

# Improving Protocols & Workflows

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**New ways of delivering healthcare, needs a gap analysis for current protocols and workflows – and ways to address them.**

[Montana State University and Billings Clinic](#) are working together to develop a system that tracks nurses' interactions with patients through ML to identify areas for improvement in workflow and diagnoses, with the goal of enhancing patient care and supporting clinicians with more efficient and effective tools.

[Microsoft and Epic are partnering for Generative AI-powered solutions](#) integrated with Epic's EHR to increase productivity, enhance patient care and improve financial integrity of health systems. The collaboration includes NLP and ML capabilities to extract insights from health records. UC San Diego Health, UW Health in Madison, Wisconsin, and Stanford Health Care are among the first organisations deploying enhancements to automatically draft message responses.



Health Innovation

# Data as the Catalyst



**Data lies at the heart of healthcare innovations and will see a growth in data partnerships.**

Zuellig Pharma launched a healthcare data consortium for better collaboration. This will allow healthcare stakeholders to share data and insights securely, leveraging advanced analytics to drive innovations for improved outcomes. It will also enable Life Sciences organisations to develop drugs and therapies faster and more efficiently using real-world evidence obtained from anonymised patient data.

iHIS in Singapore has partnered with Google Cloud and Accenture to develop data-driven applications. iHiS is using an API-first approach to collect data across healthcare systems to reduce the need for duplicated datasets and improve interoperability. The deployment of the Apigee platform has seen the Facial Recognition Automated Visitor Management System and The Clinician's ZEDOC platform to manage patient-generated health data outside the hospitals.

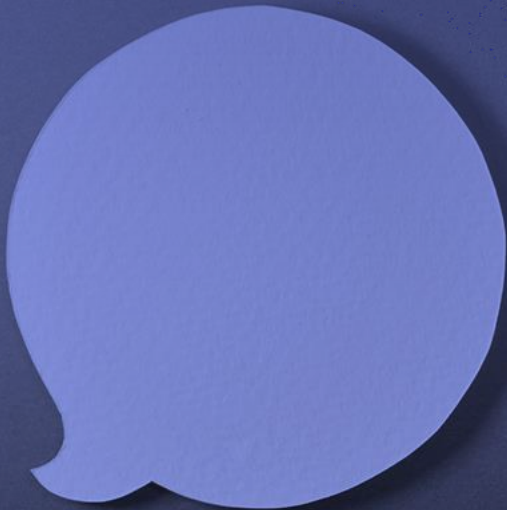




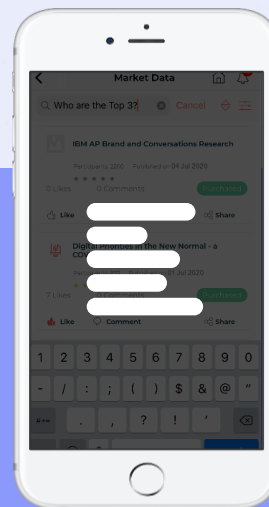
# Ecosystem Opinion



**Sash Mukherjee**  
VP, Industry Insights



The crisis is not yet over – and healthcare transformation is not yet done. Leaders need to be prepared for the next crisis and continually evaluate how healthcare can be improved, between crises. Collaborative care, involving multiple professionals and a full view of patient data across the care continuum, is key to improving healthcare outcomes. But this means that healthcare tech leaders need to focus more on the risks – chances are that data policies predate the technology being used and the data being collected today.



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