

HIMSS Europe & Health 2.0 2019 event summary

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HIMSS Europe & Health 2.0 2019 exhibition hall



Source: IHS Markit

Event themes



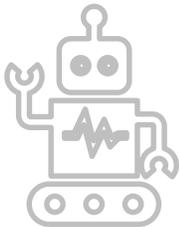
Staff burnout

- A major theme at HIMSS Europe 2019 was staff burnout. The World Health Organization defined burnout as an occupational phenomenon and physiological condition for the first time in 2019.
- Overall efforts to mitigate burnout emphasizes a digital transformation of the healthcare value chain.
- IHS Markit analysis predicts a global shortage of more than 13 million healthcare personnel by 2030.



The integration of social care and healthcare

- Social determinants of health was another major theme, as healthcare providers are looking to add an additional layer of context to patient profiles. In countries such as Finland and Estonia, social care and healthcare are combined, leading to better outcomes long-term.



Virtualization of hospitals

- Virtualization continues to be an important topic in the context of future healthcare models.
- Historically, these efforts have focused on the care continuum, but the topic is expanding to virtualizing hospitals. This involves a location flexible workforce, mobile hospital beds, digital therapeutics and more.

Issues of note

1 Providers see value in agile vendors for **digital transformation**



- Healthcare providers are increasingly interested in agile solutions from small to medium-sized vendors, due to an iterative approach to development.
- Shifting from large solution providers allows more flexibility and customization.
- The basis for healthcare providers' initial interest in agile is flexibility and not speed.

2 Patients and providers see **continuity of care** differently



- Healthcare providers are recognizing the difference in perception of patients and providers on continuity of care. For patients, it is a non-disruption of care services, as he or she moves across care settings.
- For providers, continuity of care revolves around coordinating healthcare resources across care settings to deliver great care.

3 **The care continuum** should start before care delivery, not after



- Historically, the care continuum has emphasized the idea of “bringing care from the hospital to the home”.
- This is a fundamental design flaw in solutions, since patients consider their home as the starting point for care.
- To improve patient journeys, healthcare providers must integrate the entire process into its care models, including where it all started for the patient.

Key insights

- Advanced home diagnostics
- Healthcare and social care, integrated
- Microsoft is getting serious about healthcare
- Virtual care and aging in place

Key insights

Advanced home diagnostics

IHS Markit estimates the personal health technologies market to be worth \$15 billion by 2023, growing from \$10 billion in 2018 – a market predominantly driven by consumer demand. Historically, there has been little or no network effect from healthcare providers on the use of personal health products, where patient-generated data has largely been overlooked. That is expected to change in the future.

During a keynote at HIMSS, Risto Linturi, a futurist and chairman of Sovolto in Finland, shared that healthcare providers will be forced to pay greater attention to home diagnostic devices. Sensor capability, computing power and artificial intelligence are all advancing rapidly, and the innovators of these technologies will be aiming at the masses. The technological advancements will also imply a higher degree of medical-grade technologies that will empower patients during engagements with healthcare personnel.

Ultimately, the physician may risk a malpractice case or non-compliance by neglecting patient-generated data. Advanced home diagnostics is not a negative development for healthcare providers, and could relieve pressure on healthcare personnel, enabling improved resource allocation. All things equal, patient outcomes should improve long-term due to effective prevention.

Healthcare and social care, integrated

Social determinants of health is increasingly being contextualized in healthcare to enable better support to patients. The idea is that a patient with type 2 diabetes is not only a patient with type 2 diabetes. The social context may have been the cause of the disease, and in order to provide appropriate care, providers must integrate social care in healthcare.

The typical social determinants that are being considered include:

- Income and social status
- Employment and working conditions
- Education and literacy
- Physical environments
- Access to health services
- Childhood experiences

Most of these can be captured through data; a key part of integrating healthcare and social care is about building a technology infrastructure that is able bring all of these determinants together. Epic Systems Corporation recently launched a solution in Finland that combines all of the above, including the traditional health record.

Key insights

Microsoft is getting serious about healthcare

Microsoft's notable presence at HIMSS Europe 2019 was all about empowering care teams in providing better coordinated care through a strong internal communications platform, and showcasing the future of virtual care.

The healthcare solution presented by Microsoft is built on top of Office 365, which is a key strength for its value proposition in healthcare. Microsoft has more than 150 million business users worldwide, and many large healthcare organizations already use the productivity applications featured in Office 365. This implies relatively low barriers to entry for new healthcare solutions, which in return will ease the providers' caution around vendor lock-in – historically, vendor lock-in and cost of technology has severely damaged the adoption of virtual care.

Microsoft has modified its Teams application to support clinician workflows, supporting care teams through electronic medical record (EMR) integration, secure messaging, convenient content sharing, and mobile notifications based on real-time monitoring of patients. In addition, Teams will soon support a video telehealth feature, built on the legacy Skype engine. This feature will be compliant with appropriate regulatory requirements.

Virtual care and aging in place

Virtual care for aging in place, i.e. when the recipient of care lives and ages in a residence of their choice, is delivering impressive results in Finland. According to Juha Jolkkonen, who leads the Virtual Home Care initiative in Helsinki, more than 800 elders in Finland are now using virtual care as their standard model for care. This results in more than 24,000 virtual visits per month, serving multiple purposes. Below are top use-cases for the virtual visits:

- Taking medicine under observation
- Medication reminder
- Dietary information
- Routine wellbeing check-ups
- Daily support
- Psyche follow-up
- Hygiene

As seen above, these are all low-acuity use-cases, but would normally require a traditional home visits. Conducting these visits, virtually has led to an 85% cost reduction per visit in Helsinki. In addition to the visits, the elders are offered independent living solutions for emergency response, smart lighting and automatic pill dispensing.

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