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Healthcare Business International 2023

19–21, June 2023 | QEII Centre, London



Strategic Partners



Medical Properties Trust

HBI 2023 Speakers

Speaker line up includes

Thierry Chiche **CEO, Elsan**

Jérôme Thill **Deputy CEO, Cerba Healthcare**

Peter Wharton-Hood **Group CEO, Life Healthcare**

Wolf Kupatt **CEO, Amedes**

Janne-Olli Järvenpää **CEO, Mehilainen**

Markus Hamm **Group CEO, Veonet**

Hedley Goldberg **Partner, Rothschild & Co**

Sneh Khemka **CEO, Simplyhealth**

Staffan Ternström **COO, Medcover**

Axel Paeger **CEO, Ameos**

Dirk Knüppel **Group CEO, evidia Group**

Buyanzaya Batbileg **Head of Investment, Threestones Capital Management**

Hendrik Hanekom **CEO, Intercare Group**

Joe Ryan **CFO, Medcover**

Dr Murray Ellender **CEO & Co-Founder, eConsult Healht**

Neil Wright **Commercial Director, Guy's and St Thomas NHS Foundation Trust**

Prof Ran Balicer **Chief Innovation Officer, Clalit**

Anna Wedell **Director, Precision Medical Centre, Karolinska**

Richard Banks **Group Strategy Director and European Managing Director, Virtus Health**

Andreas Ludowig **CEO, Kinios**

Fatih Mehmet Gul **VP Fakeeh Care Group, CEO, Fakeeh University Hospital**

Martin Henrichs **Managing Director – Head of Healthcare EMEA, UBS**

Chinta Bhagat **Managing Partner, L Catterton**

Joe Stringer **Partner, Octopus Ventures**

Jan Hoffmann **Co-Founder, Marta**

Thomas Hagemeijer **Healthcare Lead, TLGG**

Hafid Rifi **CFO, Asklepios Kliniken**

Kirsty Bashforth **SVP, Chief Business Officer, Diaverum**

Dr Michael Achtelik **Head of Global Key Accounts, Carl Zeiss Meditec**

Amaury Guerrero **CEO, Opty / Patria Group**



HBI 2023 At a glance

HBI 2023: Day one

Monday June 19

Strategies for University Hospitals Forum: Scaling up for the genetics and data revolution

- 10.00 - 11.30** Registration and Networking
- 11.30 - 12.00** Keynote: What is possible today?
- 12.00 - 12.30** Keynote discussion: Challenges and solutions
- 13.00 - 14.00** Lunch and Networking
- 14.00 - 14.40** Keynote: Implementing personalised medicine in a university hospital setting
- 14.40 - 15.20** Keynote: Why population health management is not what you think it is
- 15.20 - 16.00** Keynote: Deeper partnering
- 16.00 - 16.30** Tea break
- 16.30 - 17.10** Building massive data platforms
- 17.45 - 20.00** HBI Welcome Reception



Topics are subject to change, visit our website for the most up-to-date agenda at:
<https://events.healthcarebusinessinternational.com/agenda/>

HBI 2023: Day two

Tuesday June 20

Innovating: New business models, digital and finance

- 08.00 - 09.00** Registration and Networking
- 09.00 - 10.00** The 2023 Healthcare M&A Landscape
- 10.00 - 11.00** Investing in Europe
- 11.00 - 11.30** Networking Break
- 11.30 - 12.30** Healthcare Regulation 2023 and beyond
Investing in Health Care Property
- 12.30 - 13.30** Building the best model for digital
Investing in Emerging Markets
- 13.30 - 14.30** Lunch and Networking Break
- 14.30 - 15.30** This time it's personal: rethinking patient pathways
Solving for efficiency: How tech is impacting operations
Models that cover more people
How to succeed in the GCC
- 15.30 - 16.15** Networking Break
Regional Roundtables and Networking
Finding your local GCC partner networking break
- 16.15 - 17.15** How to succeed at corporate venture capital
Building an international platform
Managing your costs in challenging times
Investing in DACH
- 17.15 - 18.15** AI and Big Data: Monetisation and Outcomes
How to solve the workforce puzzle
Rebuilt better: Lessons learnt from experience
Investing in UK and Ireland
- 18.15 - 20.00** Networking Drinks Reception

HBI 2023: Day three

Wednesday June 21

Building: Robust ESG, Sector analysis

- 08.00 - 09.00** Networking and Breakfast
- 09.00 - 10.00** The shape of things to come
- 10.00 - 11.00** Building a robust ESG framework
What is your elixir for outpatient growth?
A dentistry case study
Nursing homes
- 11.00 - 11.30** Networking Break
- 11.30 - 12.30** Virtual wards and outpatient clinics:
Embracing the future for hospitals
Laboratory diagnostics - where after Covid?
Outpatient models that benefit both customers and clinicians
The investment opportunity in Fertility and Women's health
- 12.30 - 13.30** Networking Lunch
- 13.30 - 14.30** Mental Health
Imaging Diagnostics: the care gateway
Ophthalmology
Domiciliary Homecare models
- 14.30 - 15.30** Oncology
The evolution in Primary Care
- 15.30 - 16.15** What we learned at HBI 2023

HBI 2023 The only CEO-level event to bring together the sector globally



To book scan the QR code or visit our website at:
<https://events.healthcarebusinessinternational.com/booking/>

CEOs and investors in for-profit healthcare operators have huge opportunities over the next decade. There are also many challenges. To maximise revenue and profits operators need to:

- Execute well on M&A
- Build a solid ESG impact framework
- Understand how to develop great partnerships
- Build brands that deliver
- Leverage digital and AI for efficiency, care and patient experience
- Develop a culture of innovation
- Build international businesses
- Recruit and retain the right people

HBI 2023 focuses on these challenges. Whatever sector you are in, and whether you are an operator, an investor, a supplier or an advisor, you will find huge relevance in our programme.

STATISTICS FROM HBI 2022

- **Over 550 delegates**
- **Over 140 investors attended**
- **42 countries**
- **33% CEO or equivalent**
- **85% CEO, CXO or senior management**

NEW FOR 2023:

100% relevance – We've redesigned the programme to ensure you can attend sessions which are completely relevant to your business right through the event!

More on partnerships – The 2023 HBI Strategies for University Hospitals Forum brings senior leadership from both public and private groups to explore how university hospitals, academic medical centres and research institutes can overcome challenges through partnerships.

More on innovation – With digital transformation well underway we look at the innovators who are using digital and AI to improve services, efficiency and patient access.

ESG Frameworks – We look at the what and why of ESG and how to develop a framework that will make a real impact.

More on investment – We will look further in depth at investment, how inflation is impacting M&A, financing options and share global expertise with our interactive regional investment briefings.

More networking – Over 12 dedicated hours built into the agenda combined with our powerful networking app, Connect members lounge and meeting zones.

Why say YES?

We understand just how hard it is to get time out to attend a multi-day event. HBI 2023 takes this into account with an agenda and content that is focused on bringing the very best speakers together to share their expertise and address the burning issues that you face today!



To book scan the QR code or visit our website at:
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- Find new partners meet over 150 investors and 300 major operators
- Understand trends in the sector and how they will affect you
- Identify new markets and opportunities
- Understand AI and digital health and their impact on your business model
- Analyse the landscape of the industry nationally, regionally and globally
- Get practical advice on how to best finance new projects

Optimise your business growth strategy using insights and conversations with your peers who have unique stories to tell.

Save time by meeting with hundreds of leading CEOs and decision makers under one roof to set you up for long term success.

Hear stories, case studies and data points to help seize the opportunity and keep up to date on the current business landscape.

Raise your professional profile by building relationships with new and existing clients.



Colour key	 Investment and M&A	 Innovation and Digital Transformation	 Partnership
	 New Business Models	 Regional Opportunities	 Sector Analysis

Monday June 19: HBI 2023

Strategies *for* University Hospitals Forum 2023: Scaling up for the genetics and data revolution

How do we best build comprehensive mass genetic testing and data platforms? This conference addresses this urgent, burning question for all university hospitals across Europe as new guidelines enforce the roll out of mass genetic testing, particularly in oncology. And university hospitals are also wrestling with the need for population health management systems linking them to primary care.

Building all this capacity is a huge challenge calling for new payor structures, cultural change and new partnerships. This one-day forum looks at what is achievable and at how all this can be delivered.

This forum along with our [HBI Strategies *for* University Hospitals](#) initiative explores what best practice looks like in these areas, at the reality on the ground and digs more deeply into how senior managers are engaging with these issues

10.00 – 11.30	Registration and Networking
11.30 – 12.00	Keynote: What is possible today? Presentation from CXO of one of the world's most advanced health care systems on the implementation of personalised healthcare / population health management platforms. What is possible today, what will be possible tomorrow? Prof Ran Balicer , Chief Innovation Officer, Clalit
12.00 – 13.30	Keynote discussion: Challenges and solutions What are the main barriers to the roll out of comprehensive genetic testing platforms for all inpatients? And what further challenges are imposed by broader population health management systems? Here we dissect the barriers and suggest potential solutions which we then discuss during the day. Speakers include: Neil Wright , Commercial Director, Guy's and St Thomas NHS Foundation Trust Prof Anna Wedell , Director, Precision Medicine Centre, Karolinska Prof Ran Balicer , Chief Innovation Officer, Clalit
13.00 – 14.00	Lunch and Networking

14.00 – 14.40	Keynote: Implementing personalised medicine in a university hospital setting Anna looks at how Karolinska has created a virtual organisation where scientists and physicians find new ways of interacting, promoting cross-disciplinary collaborations. She also reflects on the real potential offered by a new generation of genomic tests, embedded in clinical medicine Prof Anna Wedell , Director, Precision Medicine Centre, Karolinska Center for Inherited Metabolic Diseases, Karolinska University Hospital Department of Molecular Medicine and Surgery, Karolinska Institutet
14.40 – 15.20	Keynote: Why population health management is not what you think it is There is a lot of data that can massively improve outcomes and reduce costs. And much of it is non-genetic. How do you incorporate this into a programme that delivers? What are the culture and attitudes this has instilled?
15.20 – 16.00	Keynote: Deeper partnering Building these new platforms calls for multi-decade programmes and much deeper and more intricate partnerships between university hospitals and research centres and industry. In this keynote we explore what these partnerships should look like. Neil Wright , Commercial Director, Guy's and St Thomas NHS Foundation Trust
16.00 – 16.30	Networking Break
16:30 – 17:30	Partnering and Innovation Workshops What steps do you need to take to partner more effectively whether with other provider networks or with medtech, pharma or tech? This workshop will enable you to assess where you are on the partnership ladder and to identify the actions you need to take to partner better.
17:30 – 18:00	Building massive data platforms IT and healthcare are a volatile combination! There is a long history of failed projects! So how do you best build data platforms that are scaleable and deliver the right outcomes?
18:00 – 19:30	HBI Welcome Reception

Strategies for University Hospitals Foundation Partners:



Tuesday June 20th: HBI 2023

Innovating: New business models, digital and finance

08.00 – 09.00	Registration and Networking	
09.00 – 10.00	The 2023 Healthcare M&A Landscape Will M&A in health care come to a standstill or will mountains of dry powder see it power through? What will be the impact as inflation soars to its highest levels since the early 1980s and we face recession and a workforce crisis. Hedley Goldberg, Partner, Rothschild & Co	
10.00 – 11.00	Investing in Europe How do major investors in the sector view the challenges it faces? How do they view environmental, societal and governance issues? In which sectors and countries do they see opportunities? Speakers include: Martin Henrichs, Head of Healthcare EMEA, UBS	
11.00 – 11.30	Networking Break	
11.30 – 12.30	Healthcare Regulation 2023 and beyond This remains the number one issue for health care investors and operators in most countries. Here we look in detail at what risks there are in different countries and sectors. What, if anything, can the sector do to allay them?	Investing in Health Care Property A conversation with some of the largest health care property investors discussing topics such as: How robust is health care real estate to rising inflation? What ESG frameworks are in place and what is lacking? What impact is the lack of available debt having on transactions?
12.30 – 13.30	Building the best model for digital Finding the business model that best leverages digital and technology is tough. Health care is littered with failed attempts at innovation and transformation. Often this is due to a misunderstanding of where value is really created and a failure to build integrated systems. This session looks at mistakes and lessons learnt. What does success look like for providers large or small and how is it achieved? Speakers include: Hafid Rifi, CFO, Asklepios Thomas Hagemaijer, Healthcare Lead, TLGG Janne-Olli Järvenpää, CEO, Mehiläinen	Investing in Emerging Markets Bearing the brunt of inadequate health systems, low and middle income countries are ripe for investment opportunities from the private sector. This session with leading emerging market investors outlines the challenges and the opportunities for investment, growth and innovation.
13.30 – 14.30	Lunch and Networking Break	

14.30 – 15.30	This time it's Personal: Rethinking patient pathways One-size-fits-all health care delivery is stuck in the past. Using data, genomics and an understanding of each patient's specific needs, environment and history and developing a personal care pathway is proving to increase outcomes and lower costs. Payors in markets such as France are starting to fund such an approach, opening up new revenue opportunities. This session evaluates early data from such endeavours and looks at how operators and health systems can scale-up efforts. Speakers include: Thierry Chiche, CEO, Elsan Prof Ran Balicer, Chief Innovation Officer, Clalit	Solving for efficiency: How tech is impacting operations In a world of complexity, of rising costs, waiting lists and staff shortages, finding efficiency within your existing operations and resources is critical not only to staying afloat but to growth. This session explores the ideas and direct impact that AI, data and digital transformation have had already, and will have in the near future, on operational and workforce efficiency. A mixture of the practical and the possible to inspire idea generation around tackling some of the biggest issues faced by providers.	Models that cover more people Subscription models, a rise in employee paid-for insurance, digital apps and engagement, building their own ecosystems - insurers are working with providers and making fundamental changes to health care delivery. This session explores these initiatives and their impact. Speakers include: Dr Hendrik Hanekom, CEO, Intercare Group Prof Sneh Khemka, CEO, Simplyhealth	How to succeed in the GCC Opportunities in the GCC, in particular in Saudi Arabia, are gigantic but accessing and understanding these markets isn't easy, it requires strong local knowledge and partners to be successful. In a highly competitive, brand-oriented market getting it wrong is disastrous. This session discusses the opportunities and gives practical advice on how to succeed. The session is followed by a networking break to meet local partners and investors.
15.30 – 16.15	Networking Break		Regional Roundtables and Networking Are you looking to expand or invest in a specific region but are unsure of the barriers to entry, key markets and to be aware of commonly made pitfalls? These roundtable briefings led by experts will cover markets on Eastern Europe, India, South East Asia, LatAm and more giving you insight, allowing you to ask questions and determine your best internationalisation strategy.	Finding your local GCC partner networking break Your chance to learn more about the opportunities in the GCC by meeting local partners and investors from the region.

16.15 – 17.15	How to succeed at corporate venture capital The venture capital boom of 2021 was not just from traditional VC but increasingly from large corporates looking to deploy capital or back start ups that fit their strategic goals. But for these new entrants it's not always easy or successful. This session outlines what a successful model looks like from picking the right targets, identifying the correct partners to creating successful incubators and accelerator programmes Speakers include: Prof Sneh Khemka, CEO, Simplyhealth	Building an international platform With huge investor interest in health services and fast national consolidation groups are seeking to expand across borders. This session explores exactly how to go international, what to look for and what to avoid. What synergies can be achieved and how do you create strong local brands.	Managing your costs in challenging times Rising costs from inflation, wages, and energy are indiscriminately hitting the healthcare sector and despite government support packages being pledged, the road ahead looks arduous. So how do providers control costs? This session explores strategies to keep costs at bay from strategic procurement to efficiency gains and getting more out of your existing technology. Speakers include: Joe Ryan, CFO, Medicover	Investing in DACH The 100m population of wealthy German-speaking countries is by far the largest market for healthcare services in Europe. What will be the trajectory for future consolidation, who are the players and what is the opportunity? A wide-ranging exploration with expert advisors, investors and operators discussing the region's investment opportunities, growth sectors and regulatory environment. Speakers include: Andreas Ludowig, CEO, Kinios
17.15 – 18.15	AI and Big Data: Monetisation and Outcomes How can health care operators best monetise AI and big data or best use it to improve patient outcomes? Using imaging and pathology as a case study, this session brings together operator CEOs who have developed strategies in this area with data providers who have GDPR-compliant offerings. Questions answered include: What do good data sharing contracts look like? What should operators and investors do in-house as opposed to buying in or outsourcing? Speakers include: Dirk Knüppel, Group CEO, evidia	How to solve the workforce puzzle How do you best recruit and retain a strong workforce in nurses, doctors and specialist staff? What role does training and culture play here? Providers present case studies on how they have managed to shift the needle. Speakers include: Dr Fatih Mehmet Gul, VP Fakeeh Care Group; CEO, Fakeeh University Hospital	Rebuilt better: Lessons learnt from experience This session brings CEOs together to talk about how they learned from experience, mistakes and failure of themselves or others to bring about success.	Investing in UK & Ireland The UK remains by far the largest market for private equity investment in Europe. But what are the dynamics post-Covid and post-Brexit? A wide-ranging exploration with expert advisors, investors and operators discussing the region's investment opportunities, growth sectors and regulatory environment.
18.15 – 20.00	Networking Drinks Reception			

“I believe that every organisation should strive to be at the cutting edge and in order to be at the cutting edge you need to come to events like this.”

Ran Balicer, Chief Innovation Officer, Clalit Health Services, Health Insurer and Provider, Israel

Wednesday June 21st: HBI 2023

Building: Robust ESG, Sector analysis

08.00 – 09.00	Networking and Breakfast			
09.00 – 10.00	The shape of things to come The events of the last few years have unleashed positive change on the delivery of care. With a push out of an inpatient setting, great leaps forward in remote monitoring, and far better examples of how to leverage data and AI, the question remains; what will all of this change mean? Will we see a huge reverse integration where big tech begins to dominate the sector? Are large international platforms the future? And are providers really going to be able to build lifetime patient value?			
10.00 – 11.00	Building a robust ESG framework Environmental, Social and Governance frameworks have risen to be of fundamental importance, particularly on the back of climate change and a series of scandals in the sector which have a huge impact on brand and share price. A good ESG framework can justify a higher valuation for healthcare businesses. This acceleration has left some organisations scrambling and scratching their heads to catch up. This session looks in depth at ESG, why it's crucial to get your framework right and analyses mistakes that organisations have made. mon pitfalls. Speakers include: Kirsty Bashforth , SVP, Chief Business Officer, Diaverum	What is your elixir for outpatient growth? A dentistry case study Using case studies from dental service CEOs, this session explores how outpatient groups best pursue growth. Does bigger always equal better? What is the right balance between acquisition and greenfield? How should your brand appeal to different customer groups? How do you calculate the value in adding new services?	Nursing Homes Growth projections have always been difficult in the elderly care sector – and now even challenged as a result of Covid- 19 and scandals which rocked the sector in 2022. Our panel of experts share their views on the opportunities and challenges as we look ahead to the next 3 years. Speaker include: Buyanzaya Batbileg , Head of Investment, Threestones Capital Management	
11.00 – 11.30	Networking Break			
11.30 – 12.30	Virtual wards and outpatient clinics: Embracing the future for hospitals Traditional hospitals face massive change and massive opportunity. The drive towards outpatient enables them to reduce costs and grow their footprint. Couple that with virtual wards and telehealth and they can address much larger markets. But these changes also bring a multitude of new competitors.	Laboratory diagnostics - where after Covid? Diagnostic labs saw massive growth during Covid. How has this changed the long-term outlook for the sector? For instance, has Covid enabled the sector to successfully build new relationships with government and public payors? This session also explores growth opportunities in outsourcing, new tech, verticalisation and emerging markets Speakers include: Jerome Thill , Deputy CEO, Cerba Wolf Kupatt , CEO, Amedes Staffan Ternström , COO Diagnostic Services, Medicover	Outpatient models that benefit both customers and clinicians A huge benefit of outpatient models is the ability to lower barriers for customers through locations, longer operating hours and more convenience. But what impact does this have on the happiness of clinicians? Through the lens of dental services, this session features CEOs discussing how they have balanced the needs and demands of both groups, harnessing technology, building the right culture and ensuring the future workforce.	The investment opportunity in Fertility and Women's health The fertility sector continues to steadily grow, but with a fragmented market, consolidation is not straightforward. The revolution to address health inequalities for women presents a huge opportunity - particularly linked to fertility, pregnancy and menopause. Technology has a big role to play. 'Femtech' , the term used to describe technology aimed at targeting women's health, is set to be a \$50bn industry by 2025. This session looks in depth at the crossover of these two sectors and the future growth prospects. Speakers include: Richard Banks , Group Chief Strategy Officer & European Managing Director, Virtus Health

12.30 – 13.30	Networking Lunch			
13.30 – 14.30	Mental Health The overlooked pandemic, until Covid emerged and created huge extra demand for mental health services. How far can this be met by digital therapeutics and how can operators consolidate this fragmented sector? And how far are more acute psychiatric needs being addressed in the for-profit sector?	Imaging Diagnostics: the care gateway This sector has seen a huge M&A boom as investors seek to consolidate rich west Europe (DACH, France and Northern Italy). So what is the attraction? And how far is it possible to build an ecosystem of outpatient clinics and primary care around an imaging backbone? The session also looks at how far governments are prepared to move on outsourcing these services.	Ophthalmology Ophthalmology continues to be a big area of investor interest with considerable scope for consolidation. Governments are increasingly outsourcing cataract operations and the sector is starting to unlock the potential for multifocal lenses in middle age. We'll explore how businesses are increasing their value in the drive for profit growth. Speakers include: Dr Markus Hamm , Group CEO, Veonet Dr Michael Achtelik , Head of Global Key Accounts, Carl Zeiss Meditec Amaury Guerrero , CEO, Opty / Patri Group	Domiciliary Homecare models This is a sector that is likely to see massive growth as nations retreat from public provision and as new business models allow new entrants to compete with mom'n'pop. So what are the new models in franchising and digital? And which market sectors and which countries offer the best opportunities. Speakers include: Jan Hoffman , Co-Founder, Marta
14.30 – 15.30	Oncology There is still a long way to go to build capacity in oncology care, but with huge investor interest linked to the close synergies with the rapidly consolidating imaging diagnostics sector, the opportunities are huge not only in Europe but in Emerging Markets, too. Add into that public sector outsourcing and there's a lot of room for growth. This session explores the opportunities and analyses the best models to build capacity.		The evolution in Primary Care The huge primary care sector in Europe holds the key to outpatient consolidation. Here we look at how operators are pairing it with digital and telehealth, pharmacies and imaging, and at how they are reimagining its delivery and business models. Speakers include: Dr Murray Ellender , CEO & Co-Founder, eConsult	
15.30 – 16.15	What we learned at HBI 2023 A look at the learnings from HBI 2023 with analysis of the main trends and a summary of the key data points and slides to take away			



“HBI is a unique opportunity to meet a lot of peers in my group but also to listen to presentations which bring the state of the art opinion on any type of subject.”

Guiseppe Recchi, CEO, Affidea, Imaging Diagnostics, pan-European

Strategic Partners:



Medical Properties Trust

“I personally think that HBI is emerging as one of the absolutely key healthcare platforms for discourse and networking in the world.”

Helmut Schuehsler, Chairman & CEO, TVM Capital Healthcare



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