

# Future of Health

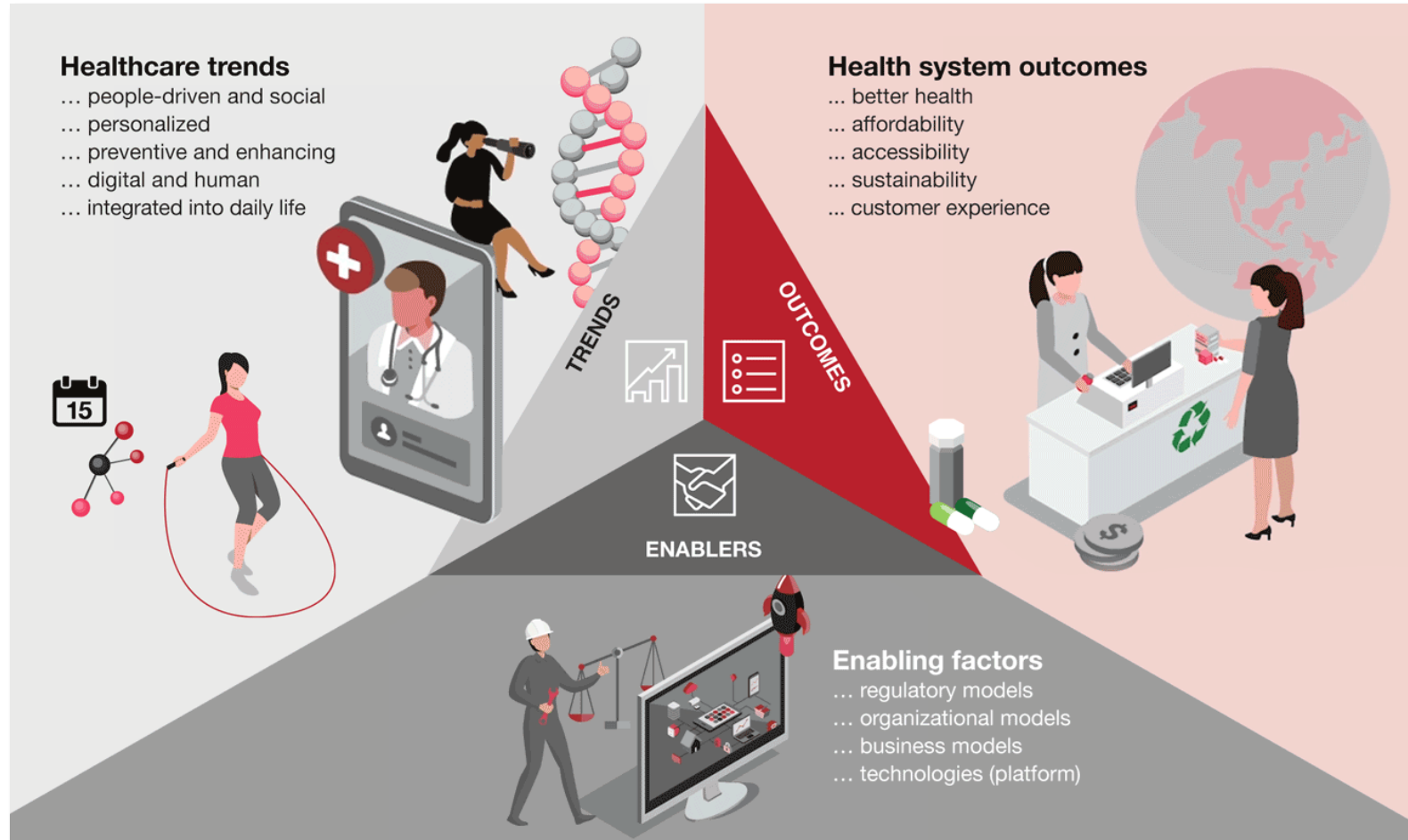
How the  
LIFECare system is  
transforming the Future of  
Health Globally and in Abu  
Dhabi

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# The Future of Health will be driven by overarching healthcare trends to drive lasting outcomes

## Trends

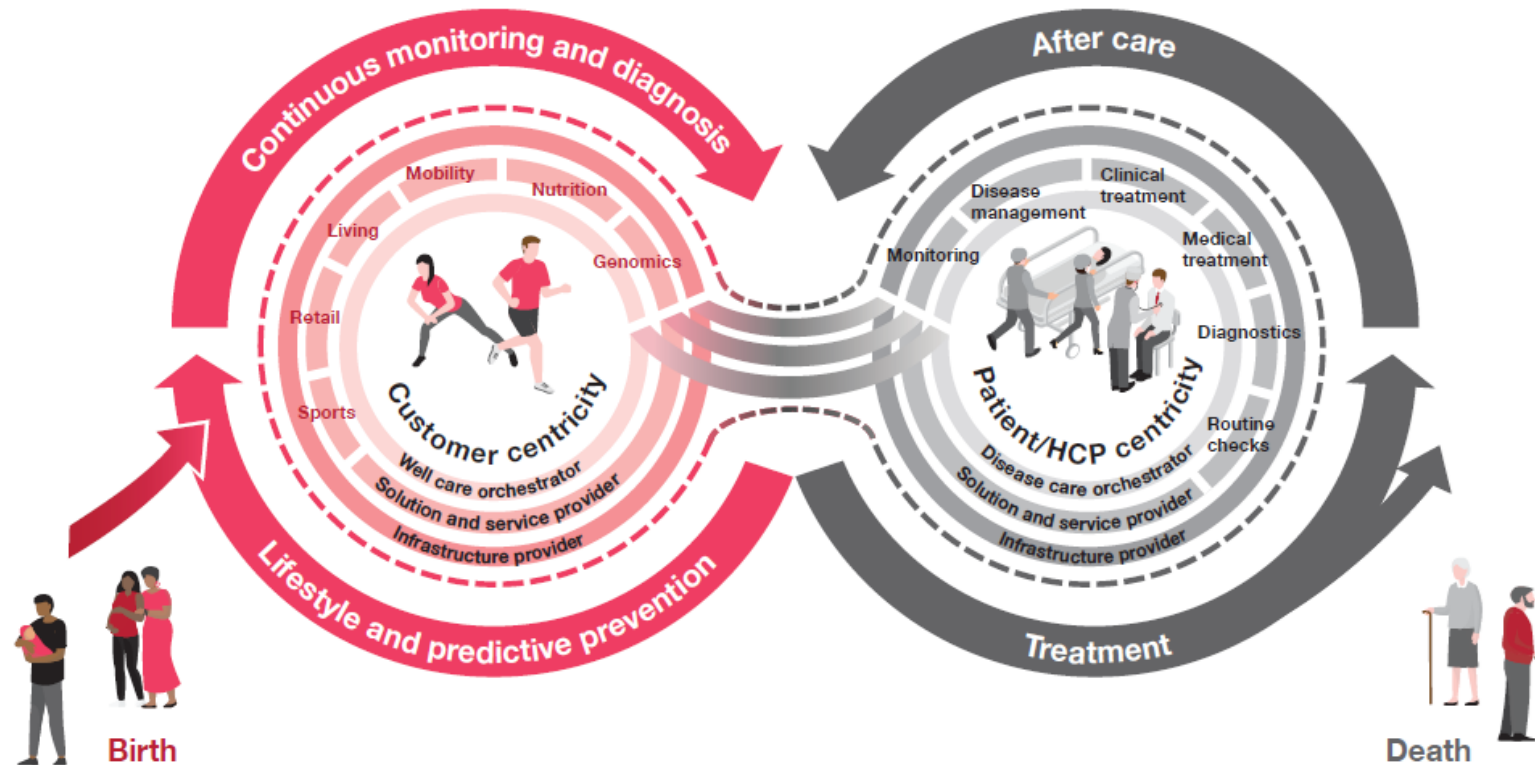


- The way we think, manage and experience health is **undergoing tremendous changes**
- We will see **increasing** amounts of **data converging**
- Trends show **deepened biology understanding** with an increased number in viable **technology platforms**
- **By 2030, healthcare will be people-driven**, preventative, personalized, digital, and integrated into daily live
- **New** regulatory, organizational, and business **models will enable** this development

Source: Future of Health - How to transform BioPharma for the upcoming LIFEcare system

# The LIFEcare system implies convergence between disease care and well care systems

## LIFEcare system



Source: 2021 survey among 150 healthcare executives; Strategy& analysis

Source: Future of Health - How to transform BioPharma for the upcoming LIFEcare system

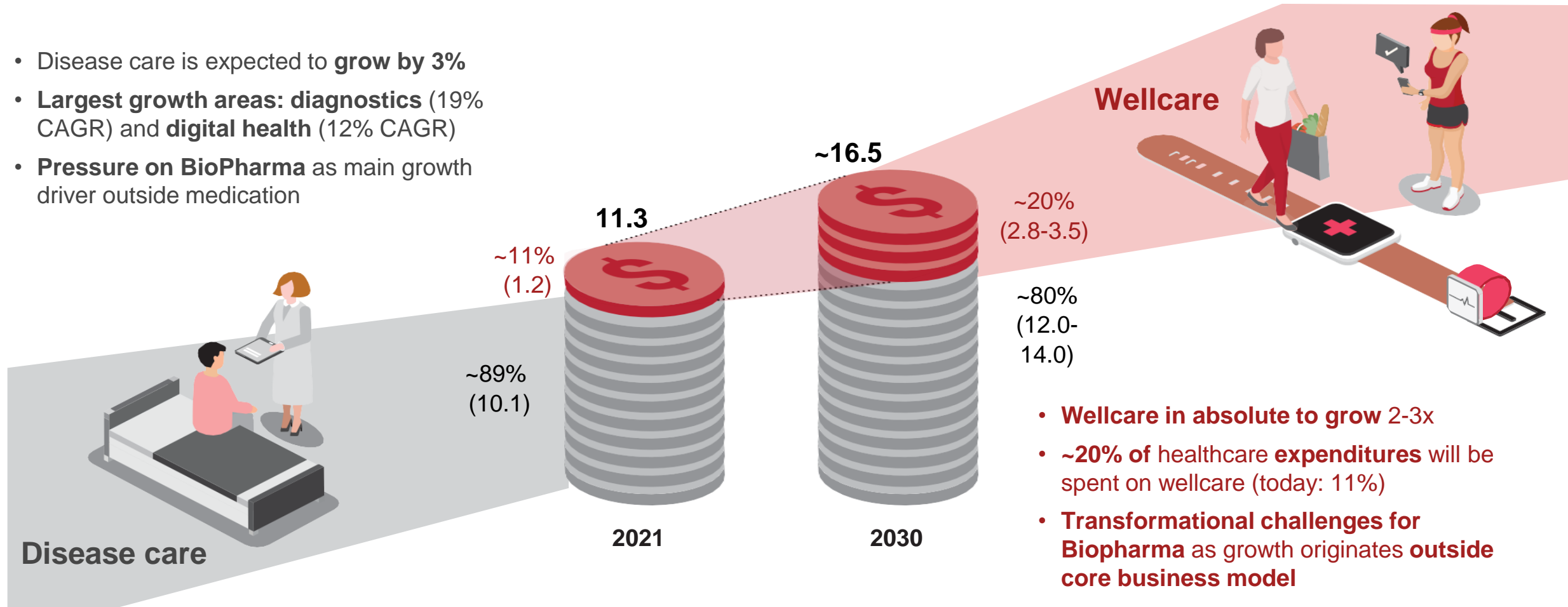
PwC Health Industries

- People today are on average in **good health** and **focus on achieving wellbeing**
- However, **healthcare typically focuses on treating diseases** (*disease care system*) rather than managing health (*well-care system*)
- We believe that, in the future, **these two systems will converge** into an **integrated LIFEcare ecosystem**
- This will allow the **integration of lifestyle and healthcare data**, enabling **better management** of disease and well-care

# With the LIFEcare system emerging, we expect significant overall growth, where Wellcare will nearly triple its market size

## Global healthcare growth & expenditures shift

- Disease care is expected to **grow by 3%**
- **Largest growth areas: diagnostics** (19% CAGR) and **digital health** (12% CAGR)
- **Pressure on BioPharma** as main growth driver outside medication



- **Wellcare in absolute to grow 2-3x**
- **~20% of healthcare expenditures** will be spent on wellcare (today: 11%)
- **Transformational challenges for Biopharma** as growth originates **outside core business model**

# We identified 7 key focus areas to deliver sustained outcomes as health is reimaged through LIFEcare systems

## Focus Areas



### 1. Consumer empowerment

*Identify and deliver on what consumers value, e.g., use patient outcomes to measure success*



### 2. Right care, place & time

*Implement new models of 'integrated care' e.g., move from products to solutions*



### 3. Keeping people healthy

*Shift from treatment of illness to wellness. Increase health literacy be responsible for your health*



### 4. Collaboration Model

*Increase partnerships, e.g. PPP, new & established players to deliver consumer centered health services*



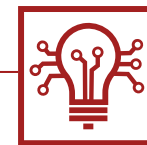
### 5. Workforce of the Future

*Build capabilities, e.g., digital and analytics, multidisciplinary teams, leadership and change mgmt., and leverage AI to complement workforce*



### 6. Outcomes-based funding

*Shift from volume to value to enable prevention to drive innovation and eliminate cost shifting e.g., integrate behavioral incentives and insurance*



### 7. Digital, analytics & innovation

*Leverage technology and data to deliver convenient, affordable, preventative and quality care, and strengthen cybersecurity for digital health*



# Abu Dhabi has already embraced LIFEcare system with DoH playing a key role in shaping the healthcare system

## LIFEcare Focus Areas

## ...Aligned to...

## Abu Dhabi healthcare outlook



**Consumer empowerment**



**Outcomes-based funding**



**Keeping people healthy**



**Collaboration**



**Workforce of the Future**



**Right care, place & time**



**Digital, analytics & innovation**



### ✓ Universal Healthcare Coverage

Abu Dhabi has implemented mandatory health insurance for all residents, ensuring the vast majority of nationals and expats are covered by health insurance



### ✓ Shift to Primary Care Model

Healthcare delivery in Abu Dhabi is adopting a new primary model of care that supports prevention and early detection (e.g. via Genome Oasis, Emirati Genome Program)



### ✓ International Collaboration and Accreditation

Providers in Abu Dhabi have established partnerships with academia (e.g. Harvard, Penn Med), industry (e.g. AZ, Lilly, G42), and healthcare providers (e.g. Cleveland Clinic, Imperial College)



### ✓ Public and Private Healthcare Providers

Abu Dhabi has setup public and private healthcare partnerships. Purehealth and SSMC are some of the most prominent public providers



### ✓ Healthcare Regulation & Oversight

The DoH is responsible for the oversight and regulation of the healthcare sector in Abu Dhabi (e.g. 1,512 drug coding applications registered, 28 medical devices approved)

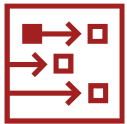


# Abu Dhabi has a focused strategy and is already delivering on focus areas thereby becoming a future health leader

## In summary, the future of health is...



A **prevention and wellness** focused **model**



**Transforming** at **full speed**



**Driving** organizations to develop new and **innovative business models** to prepare **to meet** the changing **patient demands**



**Requiring** large scale **investments** for the build out and acquisition of **new capabilities and infrastructure**



**Requiring the government to** rally and **align ecosystem partners** towards a shared vision to accelerate progress



**Abu Dhabi is well positioned with deep expertise and advanced capabilities to serve as a platform to enable healthcare transformation**

**Thank you!**

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