



BOOK NOW

HBI 2024 (14th edition) New models for the new era London, June 10-12, 2024

Strategic Partners:



Event Partners:



Confirmed speakers include:



Robert Möller
Member of the Management Board, Fresenius



Dr Amit Varma
Managing Director Quadria Capital



Justin Ash
CEO, Spire Healthcare



Amon van den Borg
CEO, Arts en Zorg



Hedley Goldberg
Partner, Rothschild & Co



Dr Arjun Kalyanpur
CEO, Teleradiology Solutions



Ian Poburennny
Director, Rothschild & Co



Dr Katie Tryon
Director of Health Strategy, Vitality



Dr Kalle Conneryd Lundgren
COO, Kry



Anastasya Molodykh-McFarlane
Senior Principal, Cinven



Dimitris Moulavasilis
CEO, Diaverum



James Tugendhat
CEO, HC-One



Martin Henrichs
Managing Director, Head of Healthcare EMEA, UBS



Charlie Bullock
Co-Founder & CEO, Scan.com



Volker Wendel
CEO, Sanoptis



Sébastien Veil
Co-Head of Healthcare, PAI Partners



Peter Wharton Hood
Chief Executive, Life Healthcare



Ghada Trotabas
EVP & Managing Director GB&I, Siemens Healthineers

FOR MORE INFO OR TO BOOK



[See website for a complete list of confirmed speakers.](#)



Ronald Scheffer
Co-Founder, Luscii



Joe Stringer
Executive Chairman, Automata



Dr Dorian Comaniciu
SVP, AI & Digital Innovation, Siemens Healthineers



Prof Dr Med Jörg F Debatin,
Founder, Honic



Dr Sunita Maheshwari
Chief Dreamer and Loop Closer, The Telerad Group



Afsane Jetha
Managing Partner & CEO, Alta Semper Capital



Charles Dalton
Global Sector Specialist – Health, IFC



Farid Fezoua
Global Director, Health, Education & Services, IFC



Emmett Moriarty
Managing Director, Ennismore Advisory



Alex Beauvais
Partner, McKinsey & Company



Antoine Jomier
CEO & Founder, Incepto Medical



Marja Aarnio-Isohanni
Former CEO, Esperio; Former Operating Partner, G Square



Dr Michael Ahtelik
Head of Global Key Accounts, Carl Zeiss Meditec



Daniel Klein
CEO, Deutsche Fachpflieger



Dr Bernd Ohnesorge
President: Europe & MENA, Siemens Healthineers



Zisis Sotiriou
Group Chief Operating Officer, evidia



Chait Tatineni
CEO International and Chief M&A Officer, Curium Pharma



Victor Savevski
Managing Director, Innovation & AI, Humanitas Healthcare



Menka Shah
Partner, IFHA



Davide Tavaniello
Co-CEO, Hippocrates



Rodolfo Guarino
Co-CEO, Hippocrates

FOR MORE INFO OR TO BOOK



Agenda at a glance

MONDAY JUNE 10

13:00 – 14:00	Registration and networking
14:00 – 18:00	<p>Making an Impact on Sustainability: Workshop in partnership with ING</p> <p>Healthcare Investing in Emerging Market Summit, in partnership with the International Finance Corporation</p> <p>Outcompeting in the age of digital and AI: Workshop in partnership with McKinsey & Company</p> <p>Dental Services CxO Summit: Workshop in partnership with Straumann Group</p>
15:30 – 18:00	Ophthalmology CxO and Investor Roundtable sponsored by Carl Zeiss Meditec
18:00 – 19:30	HBI 2024 welcome reception hosted by Siemens Healthineers

TUESDAY JUNE 11

07:45 – 09:00	<p>Registration and networking</p> <p>Breakfast briefing: Design thinking – how to make an impact in innovation, transformation and patient experience, led by L.E.K.</p>
09:00 – 09:25	Keynote: The Quality Paradigm
09:25 – 09:50	The 2024 health care service M&A landscape
09:50 – 10:15	Getting deals done
10:15 – 11:05	Investing in Healthcare
11:05 – 11:30	Coffee and networking
11:30 – 12:20	Impact Measurement and Management: Developing a common framework: Healthcare – the new era for infrastructure investors
12:20 – 13:10	The war for talent: Recruitment, retention and culture
13:10 – 14:10	Investing in health care property
13:10 – 14:10	Networking lunch
14:10 – 15:00	How to lead through change
15:00 – 15:50	Building your patient pipeline Sector in focus: Dental services
15:50 – 16:10	Tea and networking
16:10 – 17:00	The race to net zero: decarbonising your operations New sector in focus: Vet services
17:00 – 17:50	The next healthcare powerhouse: Saudi Arabia From reactive to proactive: How data and prevention are re-shaping healthcare business models
17:50 – 18:15	Learning from US outpatient models
18:15 – 20:00	Champagne networking reception hosted by Rothschild & Co

WEDNESDAY JUNE 12

07:45 – 09:00	Registration and networking
09:00 – 10:00	Keynote: Determining the right model for AI
10:00 – 10:50	What is the right model for telemedicine Sector in focus: Ophthalmology
10:50 – 11:20	Coffee and networking
11:20 – 12:10	Sector in focus: Diagnostic imaging Getting past the pilot – lessons in scalability
12:10 – 13:00	What is the winning model in occupational health The reawakening of nuclear medicine
13:00 – 14:00	Networking lunch
14:00 – 14:50	Getting the most out of your data Sector in focus: Lab diagnostics
14:50 – 15:40	Sector in Focus: Medical aesthetics Sector in Focus: Elderly care
15:40	Conference Close

FOR MORE INFO OR TO BOOK



The only CEO-level event to bring together the health care sector globally

HBI is the established forum where senior executives from health care providers meet investors to discuss the latest trends and challenges, and find new investment opportunities.

It is a great opportunity for delegates to learn about the latest trends in the for-profit health care services market. Topics include M&A, new business models, particularly the move to outpatient, workforce, brand and how to best deploy AI and digital to grow revenue and maximise profits.

The conference is a best place for partners to reach a large and influential audience. Delegates come from a wide range of backgrounds, including private equity, investment banking, insurance, and health care services, all looking for new investment opportunities and partnerships.

Some of the benefits of attending the HBI conference include

- ✓ Insights into the latest market developments and trends.
- ✓ The opportunity to meet with potential investors and partners.
- ✓ Learn from peers and leading experts in the field.
- ✓ Network with other professionals in the for-profit health care industry.

550+

Delegates

120+

Speakers

39

Countries

179

Operators

70%

CEO/CXO

128

Investors

Why attend HBI 2024?

There are many great reasons to attend. [Just click here to listen and read why so many of your peers return year-on-year.](#)

- ✓ **Find new partners** Meet over 150 investors, 300 operators and hundreds of specialist advisers
- ✓ **Improve your business model** Garner actionable insights that can be swiftly implemented
- ✓ **Identify new markets and opportunities**
- ✓ **Understand sector dynamics** and how they will affect you
- ✓ **See how AI and digital health will 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**
- ✓ **Save time** by meeting with hundreds of leading CEOs and decision makers under one roof to set you up for long term success.
- ✓ **Optimise your business growth strategy** using insights and conversations with your peers.
- ✓ **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.

Agenda

MONDAY JUNE 10 - HBI 2024 DAY ONE Pre Conference Workshops & Networking

Ahead of the main conference on June 11 and 12, Monday June 10 is designed to bring healthcare's many communities together in a new, interactive format to share ideas, lessons and best practices. Through a series of workshops and summits, CEOs, CxO teams and Investors will come together to discuss critical challenges and formulate solutions. They are designed to maximise discussion and debate and enable participants to network and identify potential partners.

13:00 - 14:00

Registration and networking

14:00 – 18:00

WORKSHOPS:

Making an Impact on Sustainability: Workshop in partnership with **ING Wholesale Banking**

Healthcare Investing in Emerging Market Summit, in partnership with the **International Finance Corporation**

Implementing your Digital Strategy: Workshop in partnership with **McKinsey & Company**

Dental Services CxO Summit in partnership with **Straumann Group**

Ophthalmology CxO and Investor Roundtable sponsored by **Carl Zeiss Meditec**

Agenda

MONDAY JUNE 10 - HBI 2024 DAY ONE
Pre Conference Workshops & Networking

14:00 - 18:00

Moving the dial on sustainability: Summit in partnership with ING Wholesale Banking

Healthcare is a sector that has long stood on the sidelines of environmental sustainability, serving an important social purpose it is already 'doing its bit'. But serving a social purpose is no longer independent from an environmental purpose, especially when it contributes nearly 5% of the world's greenhouse gas emissions, twice that of the airline industry.

The challenge for organisations along the entire healthcare value chain is; where do we start?

This interactive workshop developed in partnership with ING is designed for CxOs and investors to come together to understand more about this complex area, share ideas and success stories and start to move the needle on decarbonisation and environmental sustainability. Through a mix of case studies and interactive discussions, attendees will leave with updated strategies, new ideas and an understanding of how to drive change and finance this transformation.

Introduction and opening of session: **Hans van Uffelen**, Global Lead Healthcare & Pharma, ING

14.:00 - 15.30

Sustainability: making an environmental impact with your organization

The journey of 1,000 miles starts with one step, this well-known saying is a simple concept but challenging in reality. So how should organisations pick their focus areas? How do they measure the impact they are making? How do you set realistic but ambitious medium and long-term targets in areas such as energy efficiency, Co2 emissions, renewable energy, circular economy and waste management?

This session begins with a case study from an organisation making great progress to draw inspiration before attendees discuss their ideas in small groups.

Case Study: **Ricardo Rodriguez Iglesias, Corporate Managing Director, Recoletas Salud and Carlos Garcia Peredo, Managing Director, Head of Lending & Strategic Finance, ING**

Spanish family-owned hospital group, Recoletas Salud specifically targets lower-density cities in the country and takes a long-term investment approach to building quality hospital infrastructure and health services. Ricardo shares exactly how the group has picked its ESG initiatives, KPIs and impact measurement, the lessons learned in this process and how it has transitioned its capital structure through sustainability-linked financing.

Workshop lead: **Arash Mojabi**, Director, UK Lead – Sustainable Finance, ING

Agenda

MONDAY JUNE 10 - HBI 2024 DAY ONE
Pre Conference Workshops & Networking

15.30-16.00 **Networking break**

16.00-17.30 **The healthcare sector accelerating the transition to a greener economy/ society**

Nothing can entirely be achieved alone, progress requires partnership and each stakeholder to play a role. So how can the entire healthcare value chain collaborate and align on objectives to speed up and scale environmental initiatives? How do we ensure that all parties are reporting on the same framework, what are the barriers and how can they be overcome? What are the quick gains that can be made in scope 3 emissions?

Case study: **Ron Lavater, CEO, International Hospital Federation.**

The IHF set up the Geneva Sustainability Centre to help drive hospitals and healthcare services leaders towards achieving net zero. In collaboration with Deloitte it created the Sustainability Accelerator Tool, a platform that provides KPIs and an assessment framework to benchmark hospital performance against sustainability goals. Ron shares how they built this tool and discusses how the principles can be applied to other members of the value chain. Ultimately, such change is not possible without strong leadership. Ron discusses what skills leaders need to drive such change in today's environment, how this has changed over the past 20 years and how groups can develop young leaders.

Workshop lead: **Laura Maari, Global Lead Sustainability - TMT & Healthcare, ING**

17.45-18.00 **Wrap up: embedding and implementing ESG strategies within the organisation**

How do you drive behavioural change and scale initiatives across an organisation? Telling a doctor that they need to follow a new process or change their behaviour isn't an easy sell. How do business leaders build a culture of purpose where ESG strategies are embraced and adopted and not simply seen as a boardroom directive? How do you finance all of this change, new process and new technology? This session wraps up the key take-aways from the day's discussion and provides concrete examples of how to build the right culture for change.

Laura Maari, Global Lead Sustainability - TMT & Healthcare, ING

Agenda

MONDAY JUNE 10 - HBI 2024 DAY ONE
WORKSHOPS AND SEMINARS

14:00 - 18:00

Healthcare Investing in Emerging Market Summit, in partnership with the International Finance Corporation

Healthcare needs in emerging markets are considerable and are often not met by existing supply. Investors entering these markets have to be ready for risks, understanding how to spot them early and how to overcome them. This summit developed in partnership with the IFC includes leading investors and healthcare providers operating in emerging markets, sharing their insights, debating key topics and interactive roundtable discussions.

14.00-14.30: Keynote: Lessons learned from investing in Emerging Markets

Farid Fezoua, Global Director, Health, Education & Services, IFC

For the past 60 years, the IFC has been deploying private capital in emerging and developing markets, at present it has \$3.5bn invested in healthcare businesses globally. Right now, emerging markets present an opportunity with huge potential but investors need to proceed with caution. In this opening keynote, Farid lays out the opportunities and gives advice on risks and how to overcome them, reflecting on the lessons the group has learned over the last half-century of investing.

14.30-15.30: The investor's viewpoint

Following the opening keynote, a panel of Investors from a broad range of geographies reflect on the topics raised and share their perspectives and lessons learned from their own experience whilst also taking questions from the audience.

Speakers include:

Afsane Jetha, Managing Partner and CEO, Alta Semper Capital

Matthew Strassberg, Partner, MidEuropa

Abrar Mir, Managing Partner, Quadria Capital

Menka Shah, Partner, IFHA

Moderated by: **Silven Chikengezha**, Global Sector Lead, Health Services, IFC

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Agenda

MONDAY JUNE 10 - HBI 2024 DAY ONE WORKSHOPS AND SEMINARS

15:30 – 16:15 Networking Break

16.15-16.45: The audience's viewpoint

Having heard the advice and opinions of investors, this interactive discussion is a chance for you, the audience, to share your reactions, debate ideas raised and to prompt further questions.

Moderated by: **Charles Dalton**, Global Sector Specialist, Health, IFC.

16.45-17.45: The provider's viewpoint

Having heard from investors about the opportunities emerging markets offer, here providers tell their stories and what it really takes to achieve growth. Do they agree with the advice investors offer or is their experience different? What is their advice and how can you use that in your own investment strategies?

Speakers include:

Emmett Moriarty, Managing Director, Ennismore Advisory

Matt Williams, CEO, Africa Healthcare Network

Irfan Khan, Chief Commercial Officer & CEO, Evercare Group: Kenya, Nigeria, Pakistan

Dr Zoe Kyriakou, SVP Global Head of Healthcare Consulting, Siemens Healthineers

Moderated by: **Raju Narayan**, Global Sector Specialist, Health, IFC

17.45-18.00: Closing reflections

Farid Fezoua, Global Director, Health and Education, IFC

Having listened to the perspective of investors, the audience and providers, Farid summarizes the key takeaway messages from the afternoon.

Agenda

MONDAY JUNE 10 - HBI 2024 DAY ONE
Pre Conference Workshops & Networking

14:00 - 18:00

Outcompeting in the age of digital and AI: Workshop in partnership with McKinsey & Company

Digital and AI have seeped into almost every aspect of the business. While many healthcare companies have incorporated digital technologies into their workflows, and some have had robust early success with digital transformation, many others struggle with building the scale and momentum to drive business-altering value and long-term improvements to patient care.

McKinsey research has found that while roughly 90% of companies have launched some form of digital transformation, less than a third captured the expected value from the effort. How healthcare leaders navigate the digital world to achieve sustainable improvements is the defining challenge of our time. This workshop explores the organizational “surgery” needed for healthcare leaders to digitally rewire their organizations to improve their ability to deliver high quality and cost-efficient care for all.

14:00-14:20: Opening Keynote : Capturing impact is about much more than just the technology. Companies that successfully execute digital and AI-enabled transformations must develop multiple enterprise capabilities in tandem: a business-led digital roadmap, talent, operating model, technology, data, and adoption and scaling. Doing a subset is not enough.

The opening keynote will provide a detailed perspective on how to build the enterprise capabilities to achieve impact at scale.

Kate Smaje, Senior Partner London, co-author of “Rewired: the McKinsey guide to outcompeting in the age of Digital and AI

14:20-15:15: Breakout 1

The group will split into breakout groups to discuss one of three essential enterprise capabilities for digital and AI transformations in more detail. Attendees will have the opportunity later in the workshop to join a second group of their choosing.

Agenda

MONDAY JUNE 10 - HBI 2024 DAY ONE
Pre Conference Workshops & Networking

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Creating the Transformation Roadmap Participants will focus on how to align leadership teams on a North Star vision and how to reimagine an organization with technology. The resulting decisions are translated into a detailed roadmap that is both rooted in impact and clear about the new capabilities needed to deliver. When evaluating stalled digital and AI transformations, McKinsey has found that many of the issues encountered can be traced back to missteps at this stage.

Ulrike Deetjen, Partner Stuttgart

Building Your Talent Bench There is no way to outsource your way to digital excellence. Companies need to have the capabilities to build and evolve their proprietary digital solutions, and that requires quality digital talent. Established companies often think they can't compete with digital natives for talent, but they can and do. This conversation will detail how to develop a talent roadmap, including how to create an organization that can not only hire the best but also create an environment where they thrive.

Dr Imraan Munshi, Senior Partner Dubai

The Keys to Unlock Adoption and Scaling Organizations often invest in the initial solution development but chronically underinvest in driving user adoption and scaling across the enterprise. This breakout will explore those change management challenges, with a focus on how to address at a sufficiently granular level the technical, process, and human issues that keep great solutions from delivering their full value.

Dr Akshay Agarwal, Partner London

15:15-15:30: Measure Your Digital Quotient : Asses your organization's digital maturity in a streamlined version of McKinsey digital quotient exercise. Participants will answer a short 18-question survey that will drill down on the six key capabilities to rewire an organization. The results will be calculated and aggregated in real-time to inform the follow up discussion after the networking coffee break

Kate Smaje, Senior Partner London

15:30-16:00: Networking Coffee Break

Agenda

MONDAY JUNE 10 - HBI 2024 DAY ONE Pre Conference Workshops & Networking

...contd...

16:00-16:15: Measure Your Digital Quotient cont'd Discussion of aggregated survey results.
Kate Smaje, Senior Partner London

16:15-17:00: Breakout 2

The group will split into breakout groups to discuss one more of three essential enterprise capabilities for digital and AI transformations in more detail.

Creating the Transformation Roadmap - Ulrike Deetjen, Partner Stuttgart

Building Your Talent Bench – Dr Imraan Munshi, Senior Partner Dubai

The Keys to Unlock Adoption and Scaling – Dr Akshay Agarwal, Partner London

17:00-18:00: Case Deepdives Participants will explore specific AI and generative AI healthcare use cases, from data-rich but low-AI use cases that create everyday value to high-AI use cases that democratize advanced analytics and help users forecast and create simulations at scale. There will also be a series of gen AI powered use case examples. This final part of the workshop will hopefully provide practical inspiration around how AI can accelerate improvements and drive real value.

Alex Beauvais, Partner London & **Ali Ustun**, Partner Doha

McKinsey
& Company

Agenda

MONDAY JUNE 10 - HBI 2024 DAY ONE
Pre Conference Workshops & Networking

14:00 - 18:00

Dental Services CxO Summit in partnership with Straumann Group

Dental services continue to see strong investor interest, thanks to strong self-pay and PMI revenue streams. But, as M&A slows, how do dental practices drive organic growth? How are medtech and labs becoming more integrated in the value chain? How do you build an oral health patient journey and what is the impact of digitalisation on patient, clinician and management?

This summit brings CEOs of dental chains, DSOs and investors together to share insights on innovation, efficiency and value creation through case studies and group discussion.

14:00

Workshop 1: What problem is Enterprise Dentistry able to solve – is a European model replicable for the world?

This session explores strategies and the right model for DSOs to increase access to dentistry and provide a better patient experience. It covers how corporate dental groups can build consumer-centric brands, models that make treatment more affordable and how to get patients to focus and prioritise oral health.

Presentation and lessons learned from:

Kiran Malviya, VP DSO EMEA, Straumann Group

Nilesh Panday, CEO, myDentist

Niklas Virta, Managing Director / CEO, Aqua Dental

14:35 - 14:45

Flashlight: insights of the successful partnership between myDentist and Aqua Dental and Straumann Group

Kiran Malviya, VP DSO EMEA, Straumann Group

14:45 - 15:25

Group work: Tactics to access oral treatments

Lead by **Katya Zubareva**, Partner, L.E.K. Consulting

15:30 – 16:15

Networking break



Agenda

MONDAY JUNE 10 - HBI 2024 DAY ONE
Pre Conference Workshops & Networking

16:15 Workshop 2: **Catalysts for success with patient conversion - insights and success tactics**

Impulse Presentation:

Dr Robert Brody, Chief Clinical Officer, Great Expressions Dental Group

Flashlight presentation: Insights of the successful partnership between Great Expressions Dental Centers and Straumann Group.

Dr Herbert Staehr, SVP Enterprise Consulting, Straumann Group

16:50 - 17:30 **Interactive group co-creation: success drivers for building a specialty franchise and ensuring patient conversion**
Lead by: **Katya Zubareva**, Partner, L.E.K. Consulting

17:30 Closing remarks

straumanngroup
Enterprise Solutions

Agenda

MONDAY JUNE 10 - HBI 2024 DAY ONE
WORKSHOPS AND SEMINARS

15:30 - 18:00

Ophthalmology CxO and Investor Roundtable sponsored by Carl Zeiss Meditec

As high interest rates and inflation continue to put pressure on the margins of ophthalmology groups, the playbook, particularly for private equity-backed groups has changed. Buy and build opportunities will only go so far and instead, groups must focus on other value-generating activities, process standardisation and optimisation to grow their top line. The demographic tailwinds remain strong and the dawn of new therapeutics to treat Dry AMD means that there continue to be huge opportunities in the space. But challenges remain around full-reimbursement, new payment models and standardising care delivery.

Groups need to decide what services to offer mixed with the right commercial model. Do they have to offer a complete spectrum of services to be successful or can they pick and choose the activities with the best margin? How do they ensure that their models are sustainable and can deliver care for the medium to long term?

An image and data-rich discipline, the sector has the perfect conditions for AI and other technologies to make a huge and meaningful impact on patient access and outcomes. What investments should be made in tech and what has the potential to make the biggest impact?

This CxO roundtable discussion is an opportunity for providers and investors to come together in a non-competitive environment and discuss what the new ophthalmology playbook should be. It is a chance to bounce ideas off of one another and explore what investments in technology and infrastructure are needed to ensure the sector's longevity and sustainability.

The roundtable features insights, lessons learned and follow-up discussion with contributions from:

Franz-Robert Klingan, Senior Partner, Bain & Company

Darshak Shah, Founder and Non Executive Director, NewMedica

Johanna Oberg, CEO Commercial Care, Bergman Clinics

Georgy Shakarin, Head of AI, Carl Zeiss Meditec AG

This session is strictly limited by space and is by **invitation only**. You can apply for an invitation [via this form](#).





Agenda

MONDAY JUNE 10 - HBI 2024 DAY ONE
WORKSHOPS AND SEMINARS

18:00 - 19:30

HBI 2024 Welcome Reception

Hosted by



19:30 – 22:00

HBI 2024 Annual Leadership dinner

By invitation only

In partnership with



Agenda

TUESDAY JUNE 11 – HBI 2024 DAY TWO

07:45 - 09:00

Registration and Networking

07:45 – 08:45

Breakfast Briefing: Design thinking – how to make an impact in innovation, transformation and patient experience

The logo for LEK, consisting of the letters 'L', 'E', and 'K' in a bold, sans-serif font. The 'L' and 'K' are black, and the 'E' is green.

Design thinking is deployed to get to the heart of complex issues, a step-by-step approach involving a lot of listening to ensure that ideas aren't just creative but are effective and practical - ultimately ensuring that they get adopted. For healthcare CxOs, now is the perfect time to deploy the process with the sector adopting technology at breakneck speed ensuring the voices of all stakeholders are heard as new products, services and care delivery models are developed.

Join **Craig Wills, CEO of Hi Mum! Said Dad (an L.E.K. company)** and **L.E.K.'s Katya Zubareva, Klaus Boehncke and Jacqueline Thompson** for this breakfast at HBI 2024, sharing case studies into successful projects that followed this approach and demonstrating the concept, based on working with a leading fertility clinic.

Attendees will leave with a better understanding of the process and when and how to deploy design thinking. If you are developing new products and services, looking to enhance patient and clinician experience, solving complex challenges, or looking to drive change this breakfast is a must-attend.

We hope that you can join us for what is sure to be a lively and informative discussion - with complimentary breakfast! Please [register](#) to attend.

09:00 - 09:25

Keynote: The Quality Paradigm: Digitalisation, cooperation & new care delivery models

Quality, improving patient access and outcomes, has always been the ultimate goal in healthcare but is something that has proven difficult to achieve. Through the advancement of technology, new care delivery models and digitalisation, medical outcome quality can reach new levels. Robert is in charge of Europe's largest private hospital group with a revenue of more than €12 billion in 2023, comprising Germany's Helios Kliniken and Spain's Quironsalud which extends into Latin America. Achieving quality at scale is a challenge. In this opening keynote, Robert shares how creating competence centres and clustering specialised services around large hospitals is leading to better patient flow and creating cooperative care teams. He'll also share data on how digitalisation and the use of AI is leading to efficiency and better treatments. Helios' goal is that by 2026 no significant medical decision will be made without digital assistance.

Robert Möller, Member of the Management Board, Fresenius & CEO, Helios Kliniken

Agenda

TUESDAY JUNE 11 – HBI 2024 DAY TWO

09:25 - 09:50

The 2024 health care service M&A landscape

Is 2024 the year that deals return? After a significant slowdown in M&A for more than a year, a smattering of large deals at the end of 2023 breathed hope of recovery in the market. Will 2024 see a jump in transactions and are IPOs attractive again? Will sellers be forced to accept lower valuations? What sectors and business models are most attractive? How are deals being financed and what is the impact on debt maturity? This mid-year review analyses what has happened so far and predicts what is still to come.

Hedley Goldberg, Partner, Rothschild & Co

09:50 - 10:15

Getting deals done

Despite optimism in the market and positive macro-economic winds forming, getting deals across the line continues to be a challenge, especially where bid-ask spreads remain wide. This keynote directly follows the Investment banking perspective on the M&A market to give the lawyer's view, delving into recent deals and analysing the strategies deployed to avoid deals going missing or stalling.

Dr Stephan Rau, Partner, McDermott Will & Emery

Sharon Lamb, Partner, McDermott Will & Emery

Moderated by Lee Murray, Event Director, HBI

NEW
for HBI 2024

10:15 - 11:05

Investing in Healthcare

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?

Anastasya Molodykh-McFarlane, Senior Principal, Cinven

Sébastien Veil, Co-Head of Healthcare, PAI Partners

Arnaud Vincent, Managing Director – Healthcare, Eurazeo

Moderated by Martin Henrichs, Managing Director, Head of Healthcare EMEA, UBS

Agenda

TUESDAY JUNE 11 – HBI 2024 DAY TWO

11:05 - 11:30

Coffee and networking break

11:30 - 12:20

Impact Measurement and Management: Developing a common framework

Measuring the impact of health investments is a complex task. But without a common framework, it is impossible to benchmark and understand what the real impact is because everyone is using a different yardstick. This session features three investors and takes a global look at the tools deployed to measure positive outcomes globally and collectively determine what should end-up in the standard toolbox across all markets and verticals.

Speakers include:

Silven Chikengezha, Global Investment Lead for Health, IFC

Filippo Monteleone, President, Careit

Afsane Jetha, Managing Partner & CEO, Alta Semper Capital

Moderated by Max Ateba, Associate Partner, Dalberg

Healthcare - The new era for infrastructure investors

Healthcare's stable and steady demand is attracting longer-term capital investors in infrastructure funds and family offices. So what does this new investor mean for the sector and for the businesses it is buying? What does value creation look like? How will this lead to the development of new delivery models and utilisation of community and urban space? This session featuring an Infrastructure investor and CEOs of infrastructure-owned providers includes a keynote from Italy's Hippocrates Holdings. It will dive into the between this and other types of investors and discuss the opportunities in the market this new era heralds.

Keynote: Davide Tavaniello, Co-CEO, Hippocrates

Panellists: Rodolfo Guarino, Co-CEO, Hippocrates

Assia Belkahia, Partner, Antin Infrastructure Partners

Alberto Fernandez, CEO, Healthcare Activos

Moderated by Martin Henrichs, Head of Healthcare EMEA, UBS

Agenda

TUESDAY JUNE 11 – HBI 2024 DAY TWO

12:20 – 13:10

The war for talent: Recruitment, retention and culture

Workforce remains the number one challenge for CEOs who want to grow. Increasingly, providers are hamstrung by the scarcity in clinical and management talent. With such high demand, the power dynamic has shifted in favour of the employee. This session features three providers detailing through case studies how they have managed to build retention cultures and experiment with employment models, flexibility and incentives to win the war for talent.

Dimitris Moulavasilis, CEO, Diaverum

Ronald Scheffer, Co-Founder, Luscii

Daniel Klein, CEO, Deutsche Fachpflege

Moderated by Louisa Chaves, Principal, L.E.K. Consulting

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?

Steve Nitschke, Managing Director – Head of European Acquisition, MPT

Simon Betty, Head of Europe, NWHC Reit

Andreu Huguet Llull, Co-CEO, Healthcare Activos

Market overview and moderation by Sophie Cooper, Associate Director, CBRE

13:10 – 14:10

Networking Lunch

Hosted by



Medical Properties Trust

Agenda

TUESDAY JUNE 11 – HBI 2024 DAY TWO

14:10 – 15:00

How to lead through change

How do you lead an organisation going through an unprecedented level of change, where technology is disrupting at all levels and with huge macroeconomic and environmental uncertainty? How do you drive and motivate people to deliver on your vision and mission in the short, medium and long term? How do you convince them to embrace technology such as AI where some perceive it to be an existential threat to their jobs? And how do you do this across diverse organisational and geographical businesses? This session brings three senior healthcare leaders who share examples of their success and lessons learned in leading through fundamental periods of change.

Dr Bernd Ohnesorge, President: Europe, MENA, Siemens Healthineers

Peter Wharton-Hood, Chief Executive, Life Healthcare

Dr Aaron Gerber, President, Diversified Business & SVP, Mass General Brigham

Moderated by Lee Murray, Event Director, HBI

15:00 – 15:50

Building your patient pipeline: How consumerisation is changing the business model

As demand rises and capacity remains a challenge for the public sector globally, patients are turning to self-pay and private medical insurance. With this patients have shifted to become consumers, demanding speed, more control over their care pathway and a return on their own investment; increased quality and outcomes. This session features three CEOs who outline how consumerisation has led to new business models, strong brands and long-term patient engagement including how to best build really sticky apps.

Justin Ash, Chief Executive, Spire Healthcare

Charlie Bullock, CEO, Scan.com

Dr Katie Tryon, Director of Health Strategy, Vitality

Moderated by Tom McMullen, Managing Director, HBI

Sector in focus: Dental services

Dentistry is one of the most attractive outpatient investment opportunities with an explosion in self-pay and governmental willingness to see change. This session explores what is driving demand, how to boost organic growth and the potential for further digital disruption.

Speakers include:

Niklas Virta, Managing Director / CEO, Aqua Dental

Niti Khosla, Head of Culture, Straumann Group

Daniel Fritz, Managing Director, Healthcare Group,

Houlihan Lokey

Moderated by Katya Zubareva, Partner, L.E.K.

Consulting

Agenda

TUESDAY JUNE 11 – HBI 2024 DAY TWO

15:50 -16:10

Networking and tea break

16:10 – 17:00

The race to net zero: decarbonising your operations

At 4.5% of total emissions, healthcare emits twice as much greenhouse gas as aviation. The huge energy bills of recent months has thrust this issue further up the priority list, whilst patients, employees and investors place huge importance on environmental sustainability. This session features three healthcare value chain members discussing how they are reducing their environmental impact, including analysing supply chains, waste management and smart buildings.

Shikha Pillai, Global Head of Sustainability, Siemens Healthineers

Nick Costa, CEO, Ramsay Health Care UK

Tyson Welzel, Chief Innovation Officer, Medclinic Group

Moderated by Ambika Jindal, Group Head Sustainability Integration & Implementation, ING Group

NEW
for HBI 2024

New Sector in focus: Vet Services

A consumer outpatient model like dental, aesthetics or ophthalmology, vet services is seeing strong investor interest. With the emergence of big national and international platforms, how does this sector handle workforce challenges, cost pressure, funding models and digital transformation? adding new over-the-counter products and services? This session features investors and vet services groups of different scales who share their strategies for growth.

Jean-Baptiste Wautier, Private Investor, former CIO & Partner, BC Partners

Christophe Navarro, CEO and Founder, Univet

Junko Io Sheehan, Founder and CEO, UNAVETS Group

Moderated by Martin Henrichs, Managing Director, Head of Healthcare EMEA, UBS

NEW
for HBI 2024

17:00 – 17:50

The new healthcare powerhouse: Saudi Arabia

Healthcare investment in and out of the Middle East is dominating headlines, with no country featuring more than Saudi Arabia. The astonishing plans outlined in Saudi's Vision 2030 have generated a buzz of excitement from investors and providers, but there is still a degree of uncertainty over the specific opportunities available. This session featuring investors, providers, and representatives from the government clarifies exactly what the opportunity is. It will lay out the country's vision for the future of care delivery with a particular emphasis on prevention and the digital backbone to support this before specifically addressing how investors and providers can be part of the transformation.

Dr Charles Niehaus, Executive Director, Affidea Group

Dr Khaled Hamawi, Executive Director of Health System Design and Planning, NEOM

Imran Farid, International Executive Director, GE Healthcare

Dr Helmut Schuehler, Chairman & CEO, TVM Capital Healthcare

Moderated by Hamid Yunis, Managing Partner, McDermott, Will & Emery

From reactive to proactive: How data and prevention are re-shaping healthcare business models

The global push for a preventative versus reactive approach to healthcare combined with digital technology is altering the business model for all healthcare providers. Each has the opportunity to leverage their data to open up new revenue streams, cut costs and build better relationships with payors and directly with patients. For years lab service and hospital groups have sat on huge data repositories of valuable data but lacked the business models needed to turn this into something that could drive topline growth, until now. This session explores three business models that generate value from screening and routine testing and explores exactly how technology is enabling these models to be both scalable and sustainable.

Rick VanNess, Healthcare Executive and Laboratory Data Expert, Albuquerque NM

Nelli Säger, Development Director, Mehiläinen

Prof Dr med Christian Schmidt, CEO, LifeLink Medical

Lead by Dr Matthew Prime, Head of Healthcare

Expertise & Evidence Generation, Roche Information Solutions

NEW
for HBI 2024

Agenda

TUESDAY JUNE 11 – HBI 2024 DAY TWO

17:50 -18:15

Lessons from the U.S. - The next horizon for diversified revenue

Revenue diversification is essential for survival in today's complex healthcare landscape. Whether a large acute to single speciality group, getting away from a single revenue stream has never been more important, especially against a backdrop of increased competition and the risk of reimbursement changes. As the strategy of ambulatory expansion reaches its apex globally, what strategies should healthcare organisations pursue now, to see sustainable growth into the future?

This fireside chat between **Dr Aaron Gerber, President, Diversified Business & SVP, Mass General Brigham** and **Michael Morley, Partner, McKinsey & Company** explores how and why the \$19bn Boston-based health system is diversifying its revenue streams. The conversation will explore the process of identifying internal revenue centres, where profit pools are in the market, how to bring new AI models to the forefront and how and when to partner with others or go it alone.

18:15 – 20: 00

Champagne Networking Reception

Hosted by



20:00 – 23:00

HBI and IPEM CEO Investment Dinner

This exclusive invitation-only event will bring together a community of healthcare CEOs and investors for networking and dinner. It is for leaders who are committed to working together to deliver a positive social impact in healthcare through their business activities.



Agenda

WEDNESDAY JUNE 12 – HBI 2024 DAY THREE

07:45 – 09:00

Networking

09:00 – 10:00

Keynote: Determining the right model for AI: What now and where next?

As conversations about AI continue to dominate everyday life, what does the rapid advent of this new technology actually mean for the sector? How should boardrooms and investors be investing now? What are the current use cases for productivity, efficiency and clinical support and how do we find the right model to deploy it? This session opens with a keynote outlining what the technology will enable in the not-too-distant future before exploring case studies about how it is already making an impact on quality, outcomes and productivity.

Dr Dorin Comaniciu, SVP, AI & Digital Innovation, Siemens Healthineers

Victor Savevski, Managing Director Innovation & AI, Humanitas Healthcare

Alexander Sukharevsky, Senior Partner and Global Leader of QuantumBlack, McKinsey & Company's AI arm

Michael Morley, Partner, McKinsey & Company



"It's the one place where you meet everyone in the health care ecosystem. You meet providers, you meet insurers, you meet digital health services - you meet everyone here. There are very few events like this where you get the full view of the healthcare industry."

Somesh Chandra, COO, International Health, Cigna Healthcare



"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

Agenda

WEDNESDAY JUNE 12 – HBI 2024 DAY THREE

10:00 - 10:50

What is the right model for telemedicine?

The unexpected and dramatic fall of telehealth startup Babylon in 2023 highlighted the fragility of the telemedicine model. Despite strong revenue, profitability and therefore sustainability is put into question. So, what is the right business model for telemedicine and what lessons have been learnt from Babylon and other telemedicine provider troubles? This session features three CxOs sharing their models, discussing reimbursement, growth and how to make telemedicine models profitable and sustainable.

Amon van den Borg, CEO, Arts en Zorg

Dr Kalle Conneryd Lundgren, COO, Kry

Dr Sunita Maheshwari, Chief Dreamer and Loop Closer, The Telerad Group

Moderated by Guillaume Duparc, Partner, L.E.K. Consulting

Sector in focus: Ophthalmology

Ophthalmology continues to be a big area of investor interest with considerable scope for consolidation as national and international groups continue to develop. Governments are increasingly outsourcing cataract operations, new drugs are being approved opening up bigger market potential and providers are developing new products and services to match patient demand.. In this session providers and medtech discuss new models in care delivery, the impact of smart equipment and digital disruption and its impact on value creation.

Volker Wendel, CEO, Sanoptis

Dr Michael Achtelik, Head of Global Key Accounts,

Carl Zeiss Meditec

Rens Schoenmakers, CEO, FYEO

Peter Byloos, CEO, Optegra

Moderated by Tobias Kösters, Partner, L.E.K. Consulting

10:50 – 11:20

Networking and tea break

Agenda

WEDNESDAY JUNE 12 – HBI 2024 DAY THREE

11:20 - 12:10

Getting past the pilot - lessons in scalability

Taking a great idea that yields positive results at pilot stage and scaling it across an entire organisation is tough, it doesn't always lead to positive results. A complex and change-resistant industry such as healthcare makes this challenge even harder. So, how do you approach scale in healthcare? This case-study based session features CEOs who have successfully scaled their businesses and covers topics including quality, access to care, tech-adoption and organic growth.

Siebren van der Kooij, CEO, Zorg Bij jou
Ghada Trotabas, Managing Director of GB&I,
Siemens Healthineers

Barry Downes, CEO, Affidea UK&I

Moderated by Sharon Lamb, Partner, McDermott,
Will & Emery

Sector in focus: Diagnostic imaging

This sector has seen a huge M&A boom as investors continue to consolidate particularly in Western Europe. Governments are also pumping money into the sector to increase access to diagnosis and bring down waiting times. Groups are adopting new models to integrate more services and offerings for the patient. The impact of digital transformation and AI is advanced in the sector particularly for efficiency and productivity. This session shares examples through case studies of how this innovation is driving quality and access and changing the business model and what this means for providers and investors.

Dr Arjun Kalyanpur, CEO, Teleradiology Solutions
Zisis Sotiriou, Group COO, evidia

Antoine Joimer, CEO & Founder, Incepto Medical

Moderated by Chris O'Donnell, Head of Content, HBI



“Here you meet best of breed, hear the latest trends and the best people for great networking.”

Ville Iho, President & CEO, Terveystalo, Healthcare Provider, Finland

12:10 - 13:00

What is the winning model in occupational health?

European markets are experiencing significant labour shortages, a trend sharpened by all-time-high employee sickness rates. Employers are now increasingly relying on Occupational Health providers that promise lower employee absence days, better talent recruitment and higher workforce productivity. The growth drivers in these businesses combined low-regulation, predominantly B2B and stable revenue models makes it an attractive space for investors. This session explores how such services are impacting employee health and what the best model to win in the space is. How does integration with primary care, PMI and tech-enablement transform delivery and scale access?

Petri Bono, Chief Medical Officer, Terveystalo

Jack Latus, CEO, Latus Group

Alex Goldsmith, CEO, Medigold Health

Moderator and investment overview:

Rainer Hepberger, Managing Director,

Houlihan Lokey

The reawakening of nuclear medicine

Nuclear medicine has long had its place in the diagnosis and treatment of disease, primarily in cardiology and oncology. Today, the nuclear medicine market is at an inflection point, as the rise of theranostics and the advent of novel products is expected to nearly quadruple the size of the market in the next 10 years from ~\$7bn to \$25+bn by 2033. The enormous growth in the field is driven by continued radiopharmaceutical funding where 250+ trials are currently being conducted and by trial funding increasing ~45%+ p.a. between 2019 and 2022. This session features perspectives from a provider, radiopharmaceutical group and OEM on how this is accelerating growth, shaping the market and discussing the medium and long-term obstacles.

Chait Tatineni, CEO International & Chief M&A Officer, Curium

Nick Burley, Group CEO, Alliance Medical

Ben Newton, Global Head of Oncology, GE Healthcare

Moderation and market overview:

Ian Poburennny, Director, Rothschild & Co

NEW
for HBI 2024

Agenda

WEDNESDAY JUNE 12 – HBI 2024 DAY THREE

13:00 - 14:00

Networking lunch

14:00 - 14:50

Sector in focus: Elderly Care

This sector is still reeling from the effects of the pandemic and a number of subsequent scandals made ever harder with rising costs and labour shortages. What are the new innovative care models that are being deployed? How can digital transformation and flexible employment models make a difference?

Marja Aarnio-Isohanni, Chair of MaiVei Invest, A former CEO of Esperri Care, a former Operating Partner of G Square Capital

Alberto Fernandez, CEO, Healthcare Activos

James Tugendhat, CEO, HC-One

Moderated by Eilert Hinrichs, Partner, L.E.K. Consulting

Getting the most out of your data

How are providers assessing and extracting value from their data? How do you best analyse it to improve outcomes and patient experience? And how do you best analyse it to optimise workflow and patient throughput? Three case studies demonstrate what is possible and the pitfalls to avoid.

Prof Dr Jörg Debatin, Founder, Honic

Mark Stoesz, Vice President Enterprise Solutions & Partnerships International, GE Healthcare

Michael Schelper, SVP Corporate Development, Caresyntax

Moderated by Barty Pleydell-Bouverie, Senior Asset Leader, Healthcare Analytics, McKinsey & Company

Agenda

WEDNESDAY JUNE 12 – HBI 2024 DAY THREE

14:50-15:40

Laboratory diagnostics – Growth beyond consolidation

With few consolidation opportunities remaining, the future for labs lies in organic growth and digitalisation. What will be the impact of automation and smart laboratories? Will self-testing take off massively? Is there a threat from blood testing start-ups that are like Theranos, but work? This session features three laboratory diagnostic CEOs who share their approaches to growth.

Joe Stringer, Executive Chairman, Automata

Case Study: The future of automation in labs, Automata, and The Royal Marsden

Jean-Francois Pomerol, CEO & Co Founder, Tribun Health

Jérôme Thill, Partner, Horasis

Moderated by **Dr Stephan Rau, Partner, McDermott, Will & Emery**

Sector in focus: Medical Aesthetics

This vast and fast-growing sector includes aesthetic procedures but also the treatment of age-related conditions relating to dermatology, obesity, vein diseases, presbyopia and dental. Often this is an increasingly private pay market. We look at trends and growth rates across Europe.

Speakers include:

Fabrice Turcq, Partner, Bridgepoint

Ivo Piest, Chief Development Officer, Bergman Clinics

Julius Hugelshofer, Director, Verlinvest

Moderated by **Adrienne Rivlin, Partner, L.E.K. Consulting**

NEW
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15:40

Conference Close



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