



Health Consumer
Powerhouse

**The Netherlands:
Europe's best-serving healthcare
system 2009 – and how superb
could it be by 2025?**

Zeist, October 28, 2010

**Dr. Arne Björnberg / Johan Hjertqvist
Health Consumer Powerhouse
Brussels/Stockholm**

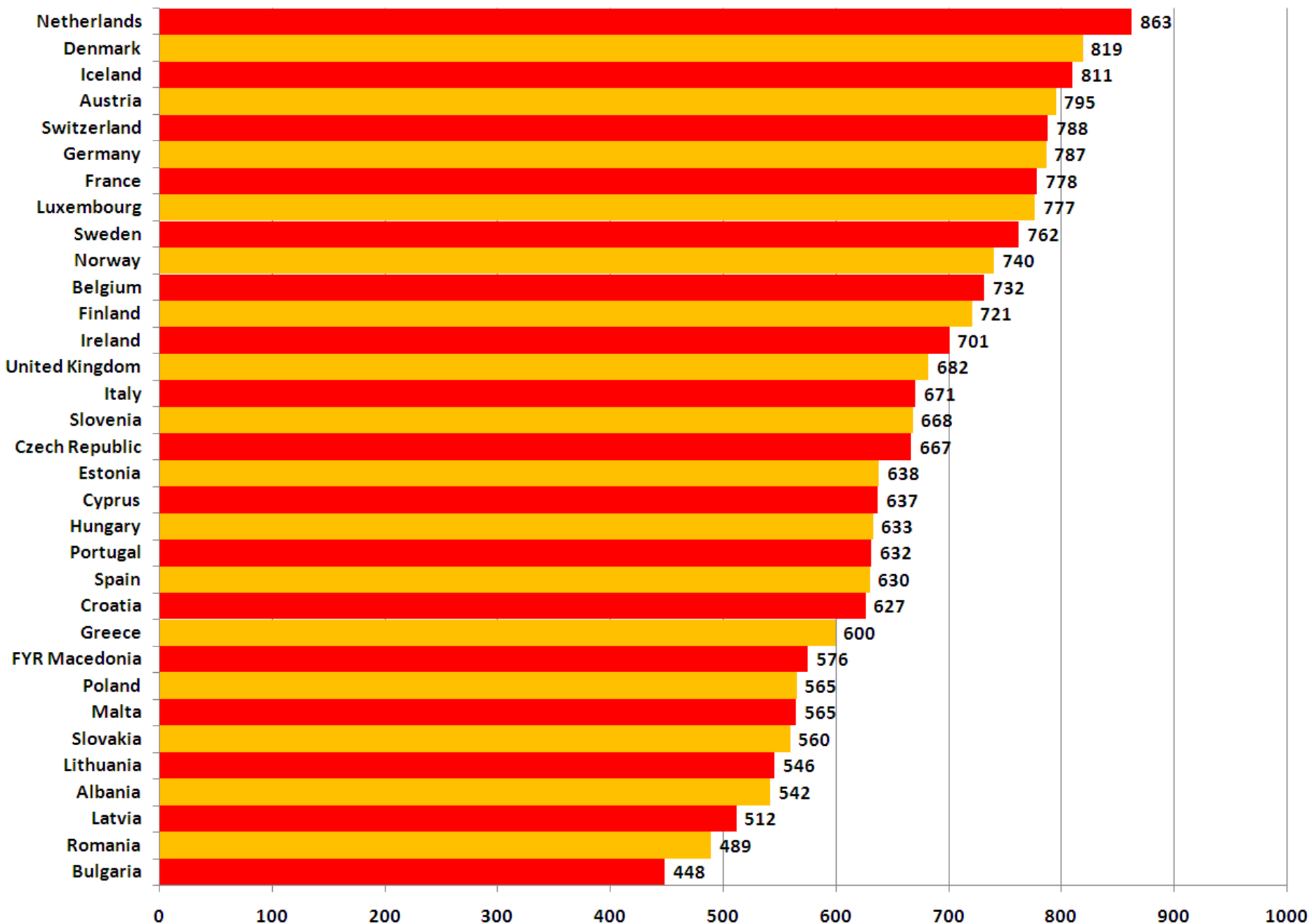
Euro Health Consumer Index 2009

- ✔ All 27 EU member states + Switzerland & Norway + Croatia and FYR Macedonia + Albania and Iceland = 33 countries
- ✔ 38 indicators in six sub-disciplines;
- ✔ 1320 scores in the EHCI matrix.
- ✔ Country scores in three grades on each indicator:
 - 3 (green): good (●)**
 - 2 (amber): intermediate (◐); "n.ap." = 2**
 - 1 (red): not-so-good (◑); "n.a." = 1**
- ✔ Total score:
 - ✔ Max score: **1000**
 - ✔ Minimum score: **333**

EHCI 2009 sub-disciplines

Sub-discipline	Weight (points out of 1000 for full score)	Winner(s)
Patient rights and information	175	Denmark (175!)
e-Health	75	Portugal
Waiting times / Access	200	Albania, Belgium, Germany, Switzerland
Outcomes	250	Sweden (250!)
Range & Reach of services provided	150	Belgium, Luxembourg, Sweden
Pharmaceuticals	150	Denmark, Netherlands

Total scores in Euro Health Consumer Index 2009



The BEST Healthcare system in Europe?

- ✔ **Since 2005, in any Index the HCP has designed, The Netherlands are unique;**
- ✔ **The NL is the only country consistently appearing in the top whatever the HCP tries to measure!**
- ✔ **Record victory margin in 2009: 44 points!**
- ✔ **The Netherlands – the Best healthcare system in Europe?**

The secrets of Dutch success?

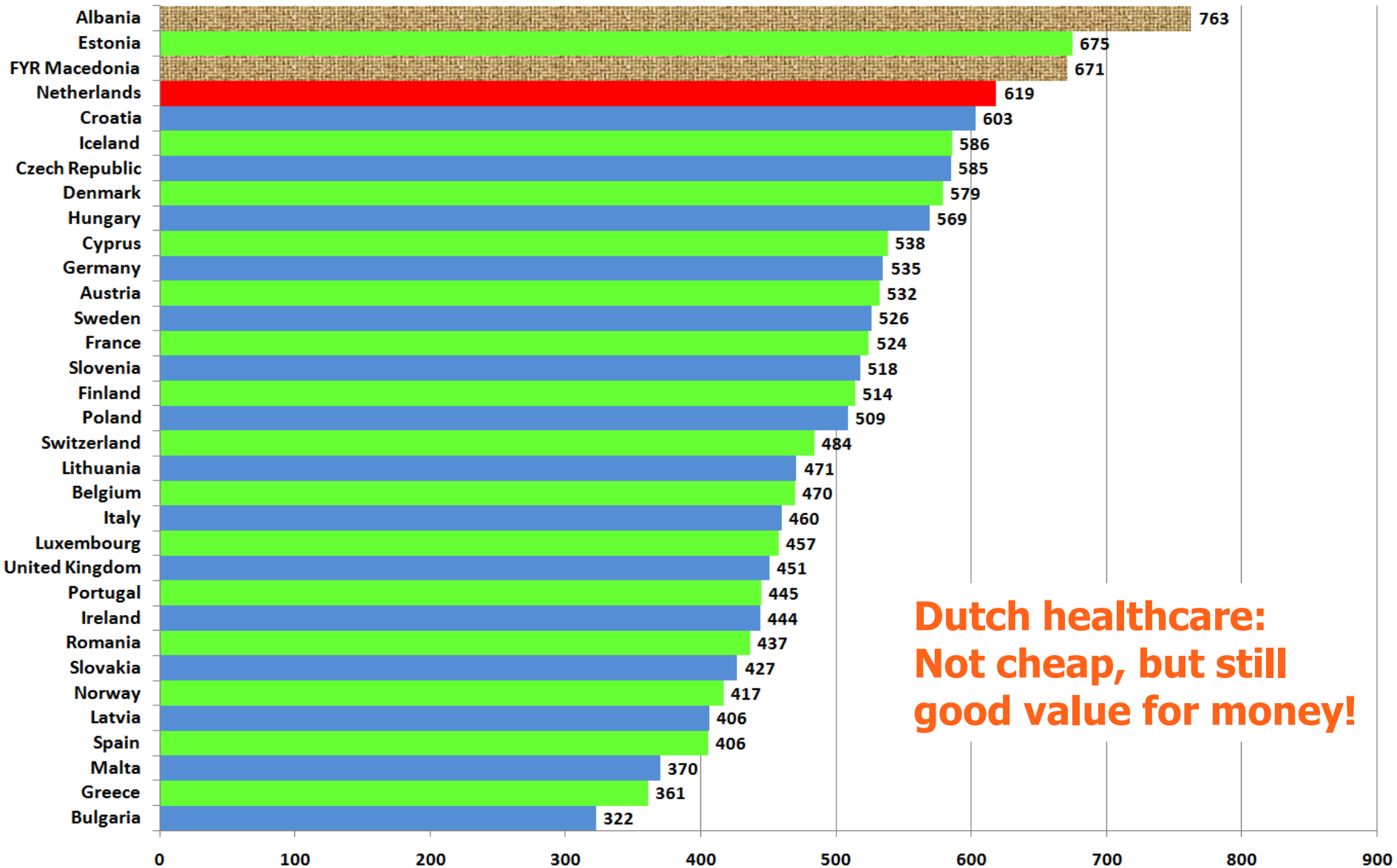
- ✔ **The 2006 healthcare reform created:**
 - ✔ **Politicians and (other) amateurs' fingers out of operative pies**
 - ✔ **Healthcare decisions taken by professionals in council with patients**
- ✔ ***Well-managed* competition between financiers and between providers (Europe is shockingly full of abysmal healthcare management)!**
- ✔ **"Bismarck Beats Beveridge"** 
- ✔ **No obsession with doing everything at home – let patients seek care in the EU!**
- ✔ **The sun has its spots, too; NL loses noticeable points on Waiting Times; GP gatekeeping does *not* save costs!**

Netherlands:

Not really outstanding in any sub-discipline – still a landslide overall victory!

Sub-discipline	Albania	Austria	Belgium	Bulgaria	Croatia	Cyprus	Czech Republic	Denmark	Estonia	Finland	France	FYR Macedonia	Germany	Greece	Hungary	Iceland	Ireland	Italy	Latvia	Lithuania	Luxembourg	Malta	Netherlands	Norway	Poland	Portugal	Romania	Slovakia	Slovenia	Spain	Sweden	Switzerland	United Kingdom
1. Patient rights and information	117	149	130	84	117	110	84	175	130	143	143	110	123	84	136	143	110	110	91	136	136	97	162	136	117	110	91	104	149	84	117	136	123
2. e-Health	29	50	38	42	54	38	38	63	46	50	33	50	38	25	46	54	42	33	29	38	38	29	63	50	38	67	25	29	38	42	54	46	54
3. Waiting times	187	173	187	120	120	160	133	120	120	93	173	160	187	147	147	173	120	120	120	120	173	120	147	107	107	80	120	133	120	93	93	187	80
4. Outcomes	95	190	155	95	143	155	190	202	143	226	202	107	214	190	119	226	202	214	131	131	202	131	226	226	131	131	107	95	155	179	250	214	179
5. Range and reach of services	64	107	136	57	93	100	121	121	100	121	114	86	100	79	86	114	114	93	79	71	136	100	129	121	86	107	71	86	107	107	136	93	121
6. Pharmaceuticals	50	125	88	50	100	75	100	138	100	88	113	63	125	75	100	100	113	100	63	50	75	88	138	100	88	100	75	113	100	125	113	113	125
Total score	542	795	732	448	627	637	667	819	638	721	778	576	787	600	633	811	701	671	512	546	777	565	863	740	565	632	489	560	668	630	762	788	682
Rank	30	4	11	33	23	19	17	2	18	12	7	25	6	24	20	3	13	15	31	29	8	26	1	10	26	21	32	28	16	22	9	5	14

Bang-for-the-Buck scores in Euro Health Consumer Index 2009



**Dutch healthcare:
Not cheap, but still
good value for money!**

2025 Flashback

- **The Dutch 2006 reform was the start of creating the number of Independent Consumption Decision Makers ("ICDM's") necessary for healthcare to turn the corner from "cost problem" into becoming an industry**
- **Today, as we all know:**
 - **Healthcare has become a service industry accounting for 15 % of the GDP of the European Union**
 - **Attractive ways of financing healthcare services, retaining equity, has become a giant Dutch industry.**

The management challenge which was solved based on the Dutch experience

(The rewards turned out to be astronomical)

**How could we make healthcare a
major service industry **while**
**retaining the basic values of equal
access to quality care?****

How could healthcare become a service industry?

- ☺ **Why not – healthcare is an excellent consumption item;**
 - ☺ **not fattening**
 - ☺ **not immoral**
 - ☺ **only mildly addictive**
 - ☺ **very labour-intensive (lots of jobs per M€!)**
 - ☺ **has a low environmental footprint**
 - ☺ **could not be outsourced to India!**

So where did all that money come from?

- ☺ **The NL 2006 reform provided one essential key: Multiple insurers, who could not say No to a patient, secured access to good healthcare for all.**
- ☺ **This gradually led to the introduction of *politically acceptable* ways to allow additional consumption of healthcare services.**
- ☺ **Attractive financing solutions for healthcare services became as common as for other expensive consumption items!**
- ☺ **Reflect: mobile telephones and communication technology has "taken" ~5 % of household budgets in 15 years – where did all that money "come from"?**

The Lisbon Agenda is dead – long live the Tallinn Treaty!

- **The second wave of financial turmoil killed the Lisbon Agenda, reborn as the Tallinn Treaty by 2018**
- **Strong focus on economic stability, innovation, lower taxes and market integration to create jobs and increase value for money delivered**
- **“Sustainable, self-funded healthcare and long term care meeting the needs of the ageing EU-32 population”.**

Short history: what happened 2011 – 2025?

- **The successful Dutch 2006 reform started spreading by 2011.**
- **2015 New Labour government in UK “bought” NL concept, already under way in Belgium (now with a government!) and parts of Spain**
- **EU mobility opened up for transparency (outcomes, prices), driving incentives-based reimbursement and competition**
- **Impact from EU patient mobility and active choice in NL started to improve value for money.**

The Tallinn Treaty and sustainable financing of healthcare in the EU

- **Instead of walking around showing perverse pride over the fact that we had been able to keep healthcare below 10 % of GDP –**
- **In 2025, with justifiable pride, we look back at how we brought the healthcare industry to generate 15 % of GDP, creating >10 M new European jobs in the process!**
- **and at the same time: improved healthcare services for all!**
- **and Sustainable Financing for Healthcare Systems!**
- **The key that unlocked it all could be traced to the 2006 Dutch healthcare reform**
- **and Amsterdam became the European capital of the healthcare *financing* industry!**

THANK YOU!

www.healthpowerhouse.com