



Healthcare Horizons

Bijeenkomst RO Masterclass 2023: Schaarste
24 november 2023

Dr. Karin Lemmens
Partner KPMG Health, KPMG Advisory N.V.
lemmens.karin@kpmg.nl



Schaarste: een blik van buiten

ADVIES 23/01 | Februari 2023

SER

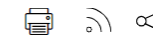
Waardevol werk:
publieke dienst-
verlening onder druk

Oplossingsrichtingen voor
de arbeidsmarktkrapte



SOCIAAL-ECONOMISCHE RAAD

17-02-2023



SER-advies

Aanhoudende arbeidsmarktkrapte in publieke sectoren vraagt om ferme keuzes van kabinet

De problemen op de arbeidsmarkt zijn groter dan ooit. Door de arbeidsmarktkrapte komt de uitvoering van publieke taken zoals zorg, onderwijs, kinderopvang en veiligheid in de knel, constateert de Sociaal-Economische Raad (SER).

Om de effecten van vergrijzing en stijgende werkdruk op te vangen zijn drastische maatregelen nodig. Niet alleen moet (meer uren) werken aantrekkelijker worden, ook is gerichte sturing nodig om het werk slimmer en innovatiever te organiseren rond de schaarse menskracht. Daarbij hoort een vermindering van bureaucratie en complexe regelgeving. Realisme past over teveel maakbaarheid: ook met gerichte actie zal menskracht de komende dertig jaar de beperkende factor blijven.

Structureel probleem

Die aanbevelingen doet de SER in zijn [advies Waardevol werk: publieke dienstverlening onder druk](#). Het advies is gevraagd door zes ministeries die beleid ontwikkelen voor sectoren die zitten te springen om personeel: **zorg, onderwijs, kinderopvang, veiligheid, rechtspraak, openbaar bestuur en uitvoeringsorganisaties**. Hoewel het aantal vacatures inmiddels iets daalt, valt te verwachten dat de arbeidsmarkt in deze sectoren krap blijft. Veel oudere werknemers zullen tussen 2025 en 2030 met pensioen gaan. Hun

Schaarste: een blik van buiten



Personeelstekort zorg: oorzaken en oplossingen

Het personeelstekort in de zorg is groot: er staan ruim [50.000 zorgvacatures](#) open. De tekorten spelen sectorbreed. Van huisartsenzorg, wijkverpleging en MSZ tot de GGZ, gehandicaptenzorg en de ouderenzorg. De [verwachting](#) is dat het personeelstekort in de zorg de komende jaren verder zal toenemen. De zorgvraag stijgt door vergrijzing en toenemende langdurige zorg. Om straks iedereen [passende zorg](#) te kunnen bieden, moet de zorg anders worden georganiseerd. Bijvoorbeeld door het delen van good practices.

Het personeelstekort in de zorg neemt toe

De sector zorg & welzijn telt rond de [1,4 miljoen werknemers](#). Eén op de zeven werknemers in Nederland werkt in de zorg. De vraag naar voldoende opgeleid zorgpersoneel neemt toe. Volgens een [rapport van de WRR](#) is in 2040 één op de vier werknemers nodig in de zorg. In 2060 loopt dat zelfs op tot één op de drie mensen die in de zorg werken, als we niet ingrijpen. Als we het beleid niet aanpassen, stijgt het personeelstekort in de verpleegzorg van 26.000 medewerkers naar ruim 240.000 in 2050, blijkt uit [onderzoek van Actiz](#). Nu spelen de personeelsproblemen vooral bij huisartsen, de langdurige zorg en GGZ. Op langere termijn spelen ze in alle zorgsectoren.

Personeelstekort in de zorg in het kort

De belangrijkste oorzaak van het personeelstekort in de zorg is de toenemende zorgvraag door de vergrijzing en toenemende langdurige zorg.

Korte termijn-oplossingen:

- ✓ Werken in de zorg aantrekkelijker maken
- ✓ Administratieve lasten verminderen
- ✓ Best practices delen

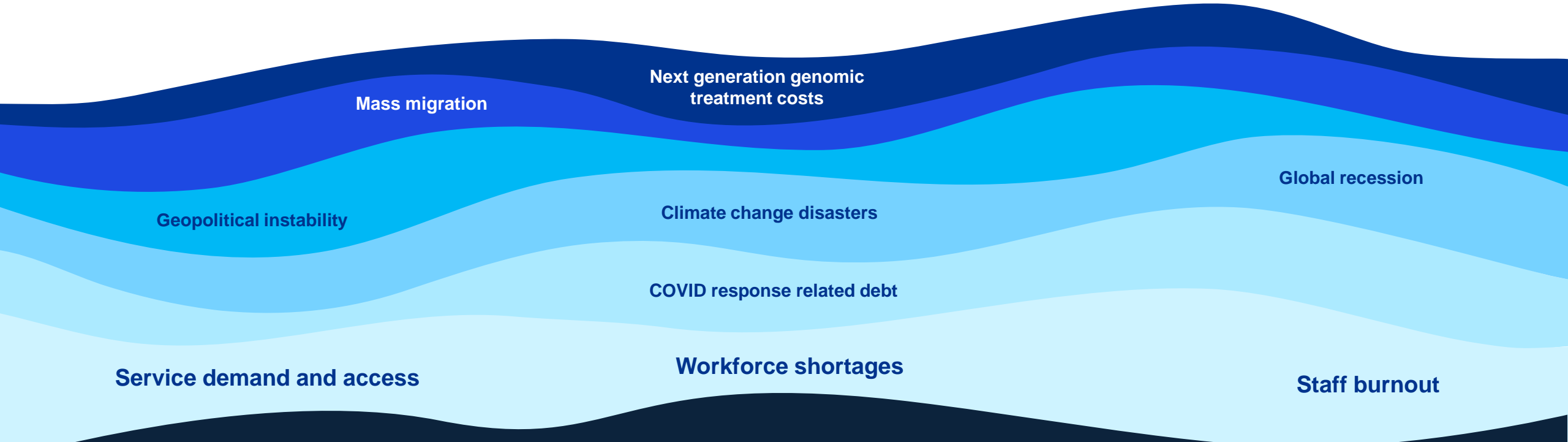
Lange termijn-oplossingen:

- ✓ Passende zorg en zelfredzaamheid
- ✓ Digitalisering en robotisering in de zorg
- ✓ Inzet van slimme hulpmiddelen

Healthcare's perfect storm



COVID-19 may be just the beginning of a wider crisis in healthcare



Pre-pandemic undercurrents:



Aging and growing populations



Increased non-communicable disease



Workforce supply and wellbeing



Outdated technology



Economic inequality



Increased social fragmentation



Increased mental health burden

Threat or thrive?



Navigating healthcare transformation: Three possible routes



Impoverished

Attempt to return to pre-pandemic “business as usual”

Reliance upon hospital-centric models of care and hiring new staff



Alienated

Overreliance on digital and technology

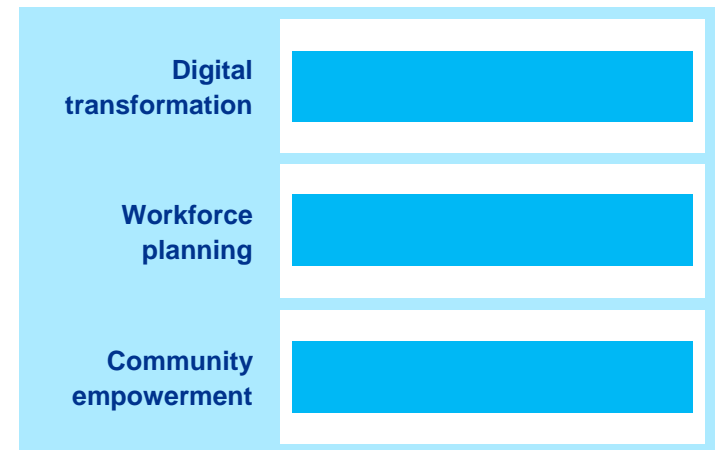
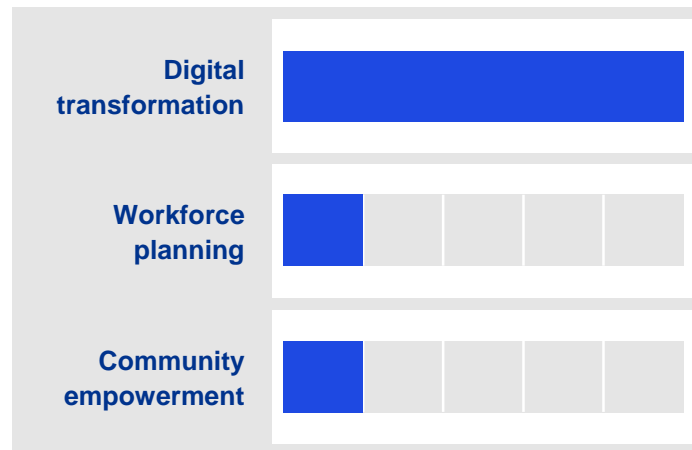
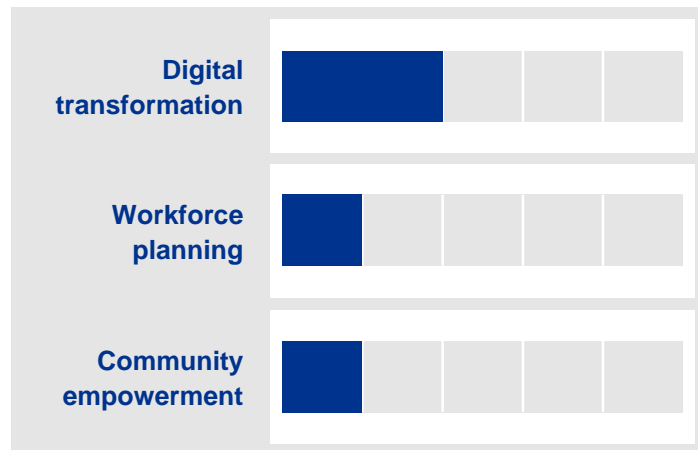
Limited workforce and community engagement and integration



Inclusive

Leverages workforces, communities and technology

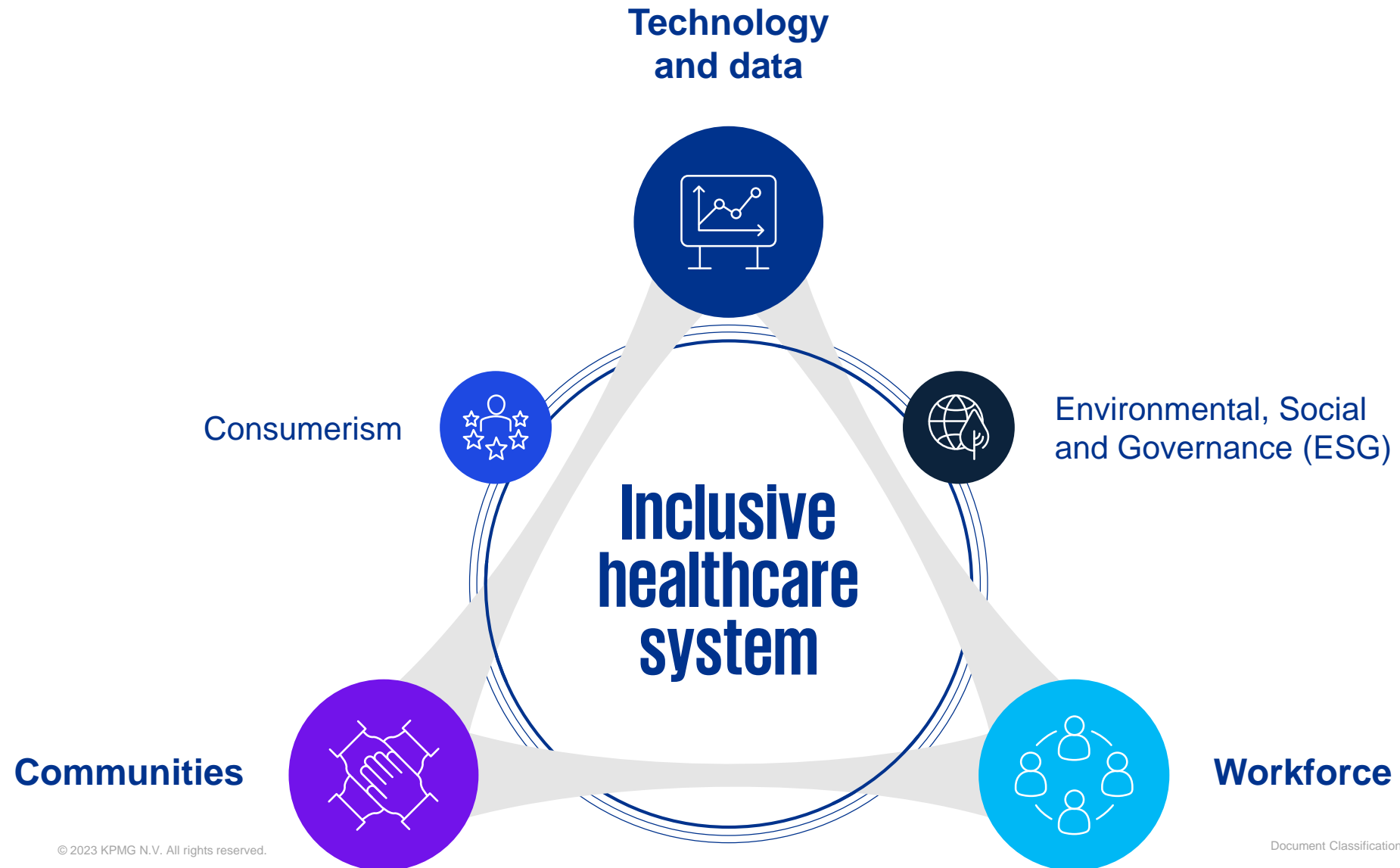
Technology used as an enabler to free up workforce capacity, empower individuals and communities



Future trends and predictions



A decade of inclusive change: A radical shift is on the horizon



Data and technology



Future trend highlight

Digital technology to transform experiences, ecosystems and clinical operations



Predicted impact on healthcare

Data decentralization through Web 3.0

Care delivery via the Metaverse

AI and cognitive technologies to liberate workloads

Signal of change



Primary Care Centre in Stockholm faced a number of challenges



Waiting lists for GP appointments hit 4-6 weeks



Using data and analytics to solve challenges



Digital platform implemented, triaging patients via nurses

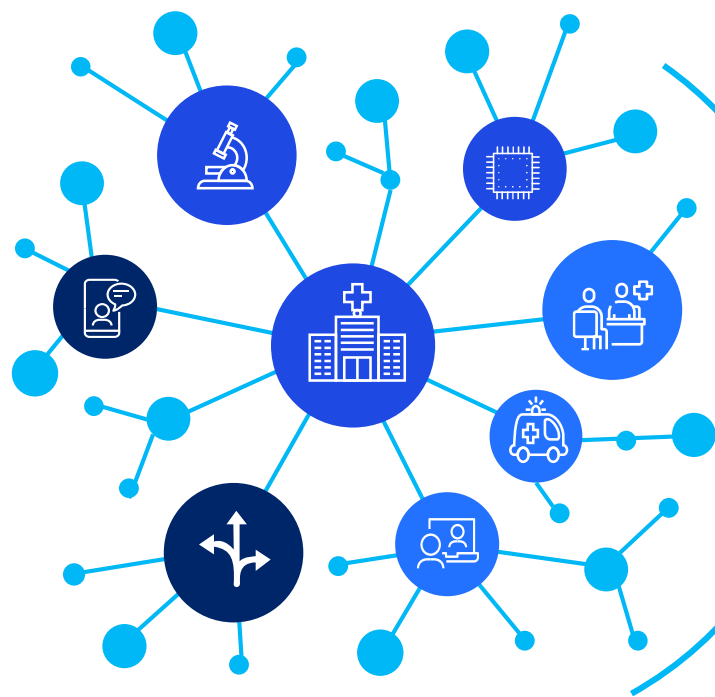


3-4 nurses treated 100+ patients per day



33% more patients treated per clinical hour

Breaking siloes to provide integrated care: the Finnish model



A collaborative, nationwide mission to integrate

- Translation of academic insights to blended care models.
- Collaboration of academic hospitals serving all of Finland.

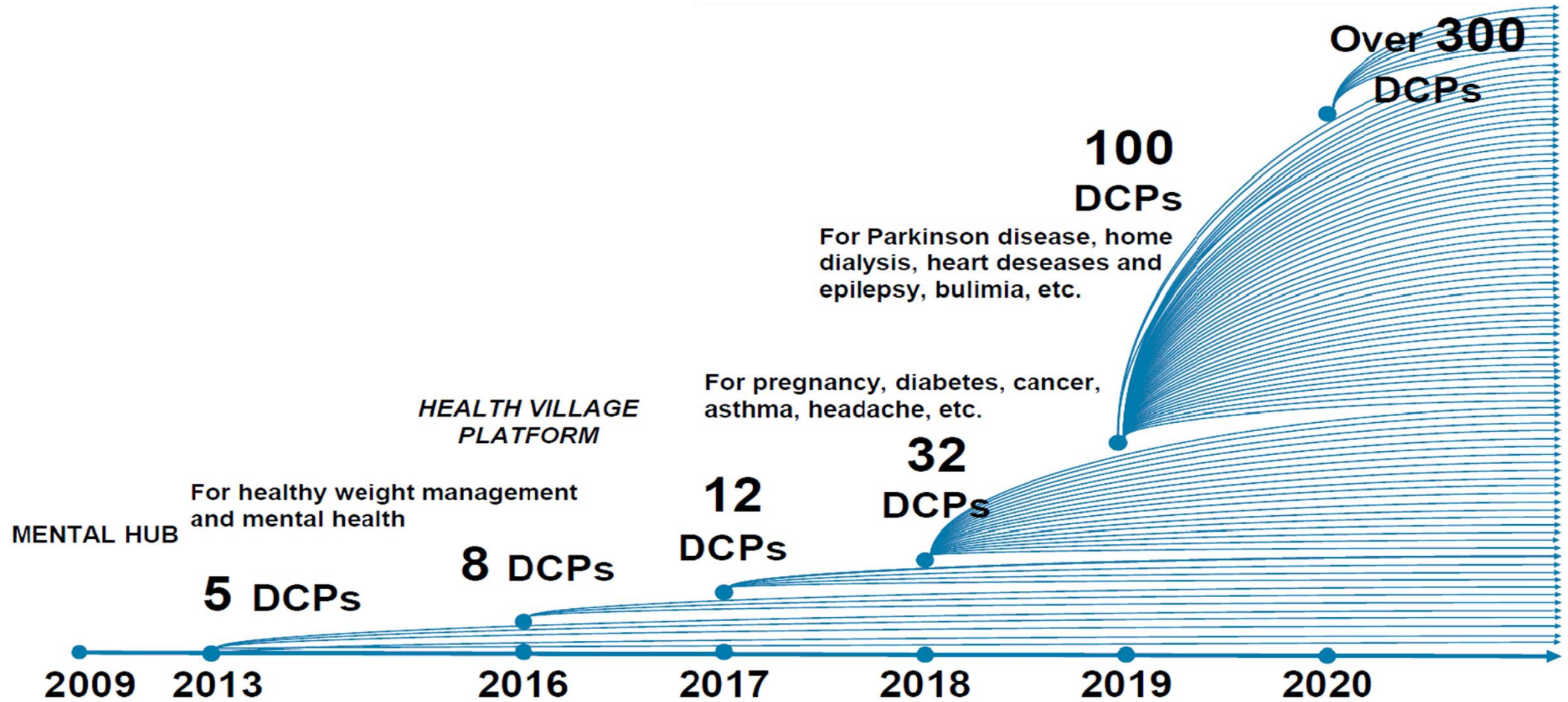
Virtual hospital (Health Village)

- Combination of physical medical care and digital healthcare.
- Expanded to over 300 care pathways, including depression, Parkinson's and obesity/bariatric surgery.

Components

- **Public:** websites/portals as the “digital front door”.
- **Patient:** virtual and physical healthcare combined.
- **Professional:** access to tools (e.g. e-consultations, e-treatments and information about patient groups and diseases).

Digital care has already been scaled up in Helsinki



Workforce



Future trend highlight

Workforces to be digitally enabled and micro-credentialed



Predicted impact on healthcare

Healthcare jobs to move from 'roles' to 'skills'

Artificial intelligence to liberate healthcare workers from routine tasks

System vs organizational employment

Signal of change

Leading hospital in Israel



Need to improve patient experiences and reduce administrative burden on staff



Digital oncology nurse service



50%↑ Patient satisfaction



78%↑ Staff satisfaction



27%↓ Staff workloads

Addressing workforce challenges



**From
rostering to
strategic
planning**



**Artificial
intelligence
for routine
tasks**



**Micro
credentials
and
platforms**



**ICS-level
employment**

Community empowerment



Future trend highlight

Communities to be activated in addressing complex societal challenges



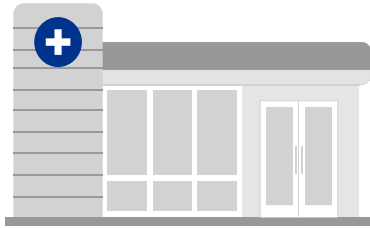
Predicted impact on healthcare

Community empowerment and responsibility for population health

Data driven community health and care

Expanded and totally new role for primary healthcare

Signal of change



**Aboriginal Community
Controlled Health
Organisations in Australia**



**Comprehensive and culturally
appropriate healthcare services**

Sources:
National Aboriginal Community Controlled Health Organisation
Australian Institute of Health and Welfare
The Medical Journal of Australia



**Initiated and operated by
local Aboriginal
communities**



**16-20% decrease
in Aboriginal and Torres Strait
Islander mortality rates
over the last two decades**

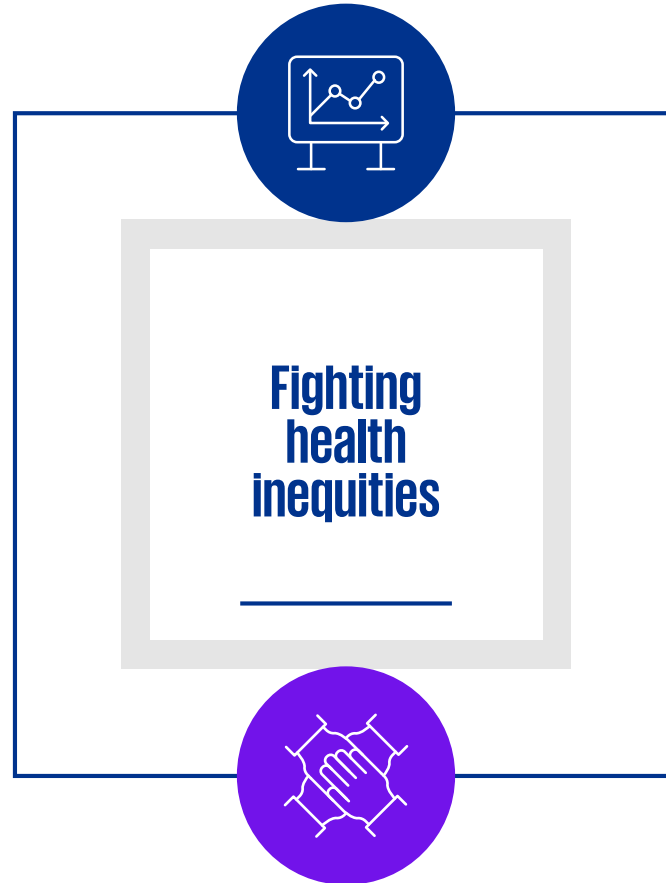
Signal of change



Disproportionate COVID-19 impact on underserved communities in the United States



Morehouse School of Medicine and the National COVID-19 Resiliency Network

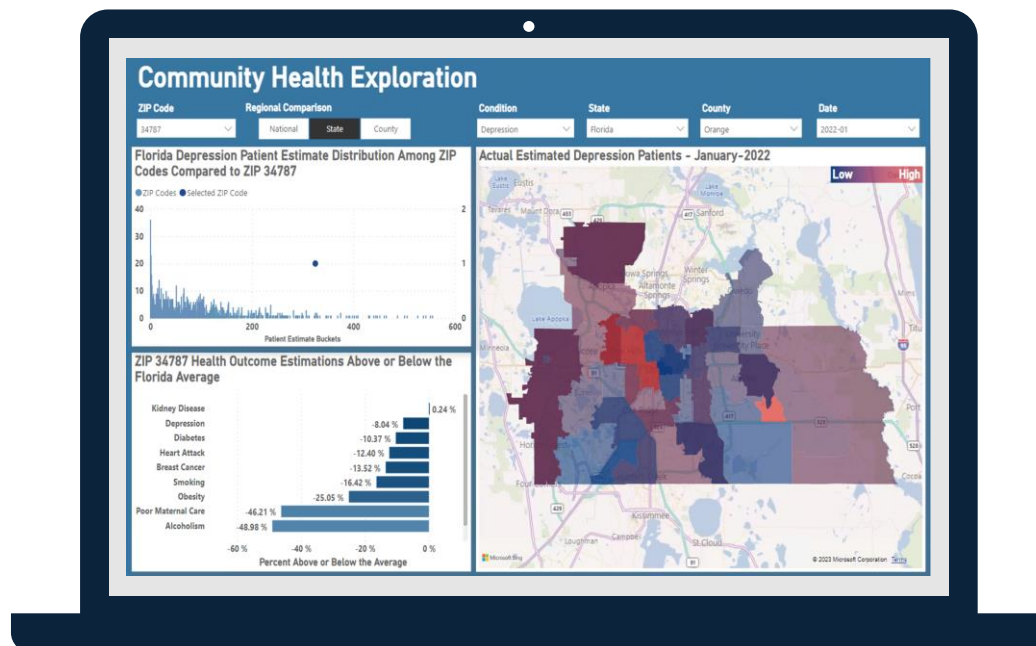


Harvesting insights from publicly available data sources

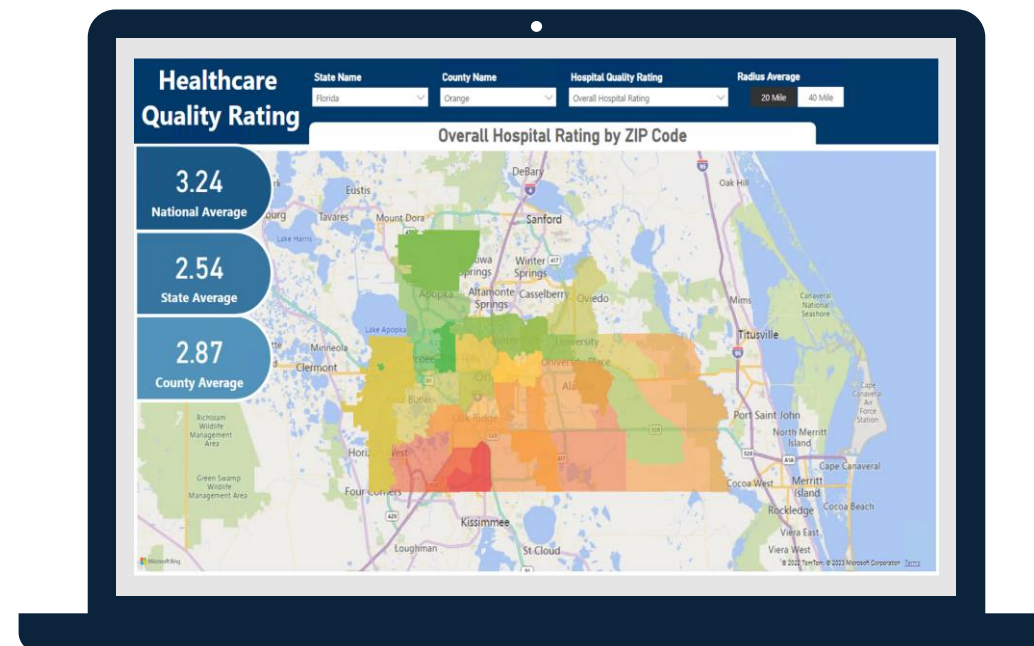


Partnering with community and other groups to provide culturally and linguistically appropriate interventions

The HE platform provides dynamic community-level health analysis



Quality of care, availability of care, and ease of access to care can be quickly ascertained



Geospatial analysis means that communities can be compared to regional and national benchmarks, whilst pinpointing of disease 'hot spots' enables stakeholders to 'locally' evaluate potential causal factors

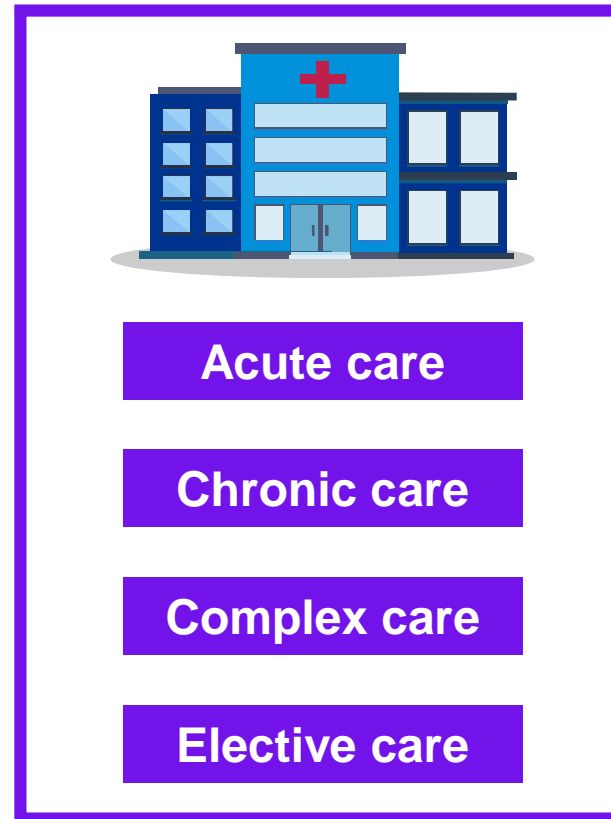
Future healthcare ecosystems



Integrated health ecosystems built around the patient give providers their role to play

Health systems will re-orient themselves less around the hospital, and more into the community where the patient has greater access and providers can focus on their core competencies

Hospitals have traditionally been “all things to all people”...



...but in the future integrated care model, systems “share the work”



Integrated care center



Elective treatment center

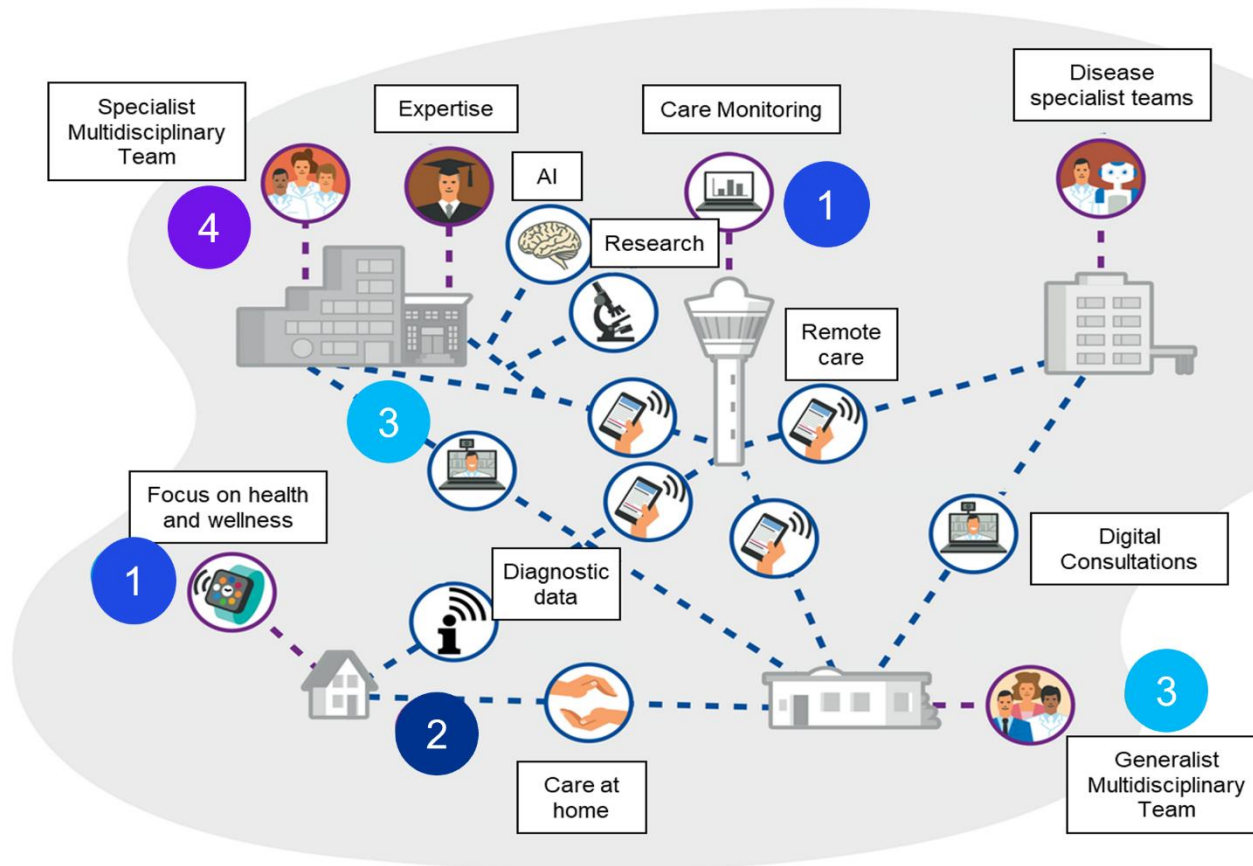


Complex intervention center



Expert center

Moving towards a new ecosystem for healthcare



Healthcare is moving towards a new ecosystem in which the 'where' and 'how' of healthcare delivery is fundamentally different. Actionable insights, powered by big data and AI, will enable systems to shift care out of secondary care and into primary care and the community.

- 1) Prevention and detection
- 2) First contact through digital channels
- 3) Easily accessible 'integrated generalist team'
- 4) Specialist care through a blended care model

What do you need to consider?



Digital

Healthcare will move at high speed into the digital era. Large providers will need to play a leading role, or risk being left behind.

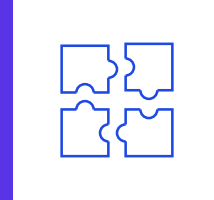
Who is taking the lead on digitization in your partnerships?



Workforce

Given the lack of workforce in the Netherlands, bold solutions are needed to ensure the sustainability of healthcare.

How will to retain and recruit effectively?



Shifting left

Prevention and early intervention is fundamental to keeping healthcare affordable and equitable as our population ages.

Are you adopting to this new ecosystem?



Integrated ecosystems

Healthcare systems will need to design and implement new ecosystems, where functions and contracts are aligned.

What is the ecosystem and subsequent contracting model for you?



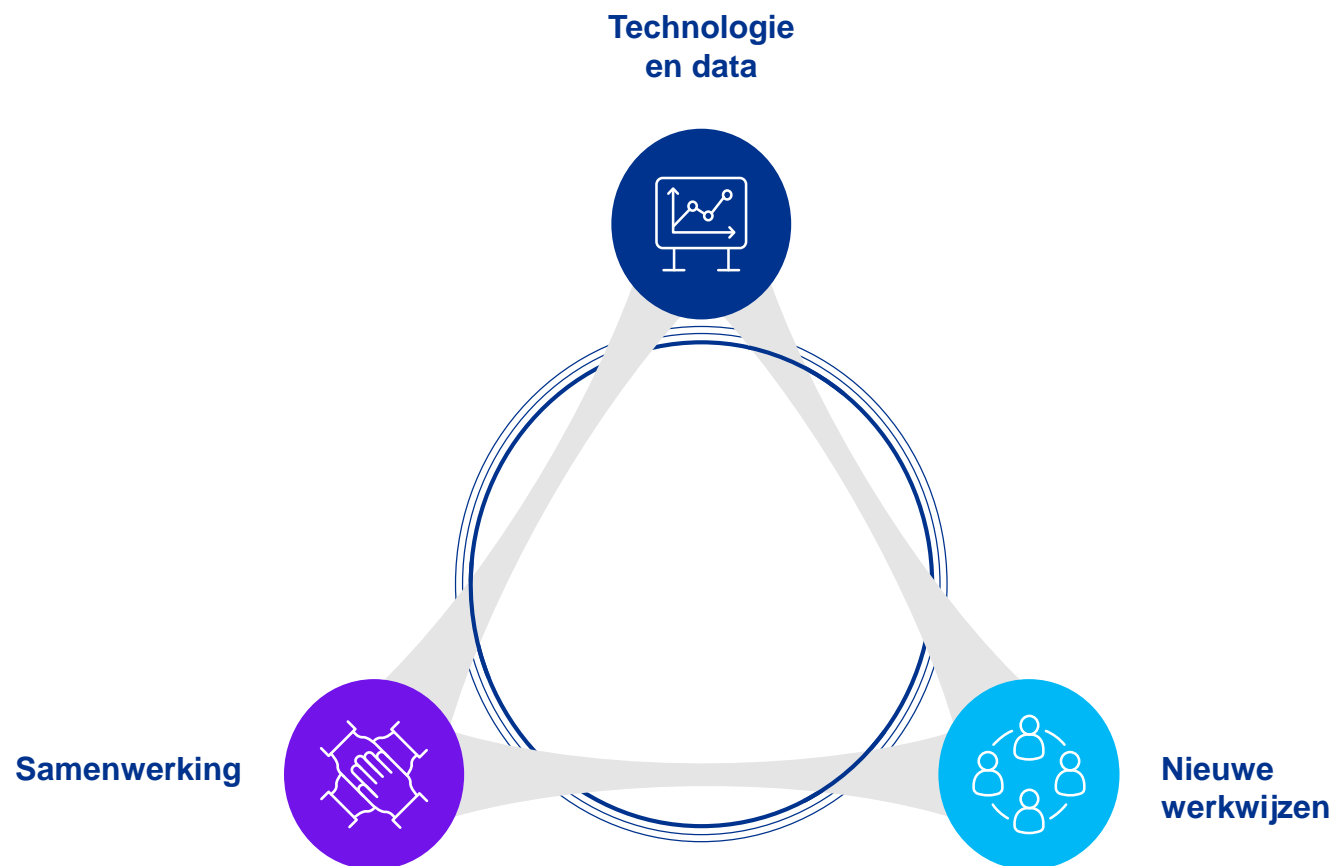
Leadership

In order to ensure sustainability, bold decisions and bold transformation will be needed.

Is your organisation thinking bold enough?

Wat kunnen internal auditors leren van de zorg?

Hoe zouden de drie kernpijlers eruit zien?



Q&A



kpmg.com/socialmedia



© 2023 KPMG N.V., a Dutch limited liability company and a member firm of the KPMG global organization of independent member firms affiliated with KPMG International Limited, a private English company limited by guarantee. All rights reserved.

Document Classification: KPMG Public