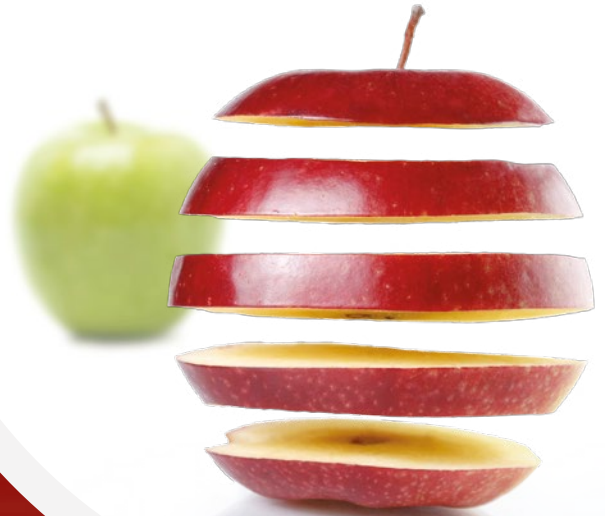


High performance. Delivered.

# HEALTHCARE DISRUPTED

## Next Generation Business Models and Strategies

by Jeff Elton and Anne O’Riordan



**NEWFOUND ABILITIES AND POSSIBILITIES ARE CHANGING EXPECTATIONS OF WHAT HEALTHCARE SHOULD BE AND HOW IT SHOULD BE FINANCED.**

*Healthcare Disrupted* is the essential guide for driving future growth and performance for life sciences and healthcare executives, helping them navigate:



### DISRUPTIVE FORCES DRIVING PROFOUND AND PERMANENT CHANGE

A combination of real world data and advanced analytics, collaborative ecosystems and rising payer and patient influence is changing the landscape for pharmaceutical, biopharmaceutical, medical device and diagnostic companies as well as the extended healthcare system.



REAL WORLD DATA AND ADVANCED ANALYTICS



COLLABORATIVE ECOSYSTEMS



RISING PAYER AND PATIENT INFLUENCE



### FOUR EMERGING BUSINESS MODELS IN THE NEW HEALTHCARE ECOSYSTEM

A new order is emerging in the healthcare industry centered on the patient with financial incentives linked to product and volume shifting to outcomes and value. Four new business models with fundamentally different economics are forming in and around the pharmaceutical and medical device industry.



#### LEAN INNOVATORS

Combines the best practices of generics efficient manufacturing and supply chains with M&A expertise for rapid growth, challenging incumbents cost structure, productivity and operating models.



#### AROUND THE PATIENT INNOVATORS

Centered largely on producing drugs in specialty therapeutics with complementary services that leverage analytics to create a new basis for product economics and value for customers.



#### VALUE INNOVATORS

Predicated on (and economics tied to) improving patient outcomes and the efficiency of the health system by integrating drugs, devices, and services with clinical processes.



#### THE NEW HEALTH DIGITALS

Leaders from other industries (e.g. technology, consumer) create a new segment changing where and how patients receive care, with economics that are grounded in digital and driven by global scale, vast ecosystems of devices and apps, and the cloud.



## BUILDING ORGANIZATIONS FIT FOR COLLABORATION AND COMPETITION

All healthcare business and operating models must rapidly embrace new collaborative technologies, building ecosystems of value-enabling partnerships. People will be the biggest advantage (or greatest impediment) to excel in this quickly evolving industry.



*"During a time of tremendous change and uncertainty, Healthcare Disrupted gives executives a framework and language to determine how they will evolve their products, services and strategies to flourish in an increasingly value based healthcare system."*

DAVID EPSTEIN, DIVISION HEAD, NOVARTIS PHARMACEUTICALS

*"Healthcare Disrupted is an inspirational call-to-action for everyone associated with healthcare, especially the innovators who will develop the next generation of therapeutics, diagnostics, and devices."*

BOB HORVITZ, PH.D., DAVID H. KOCH PROFESSOR OF BIOLOGY, MIT, NOBEL PRIZE FOR MEDICINE, 2002

## Accenture Life Sciences

Rethink Reshape Restructure...for better patient outcomes

### ABOUT THE AUTHORS:



Jeff Elton, Ph.D., is a Managing Director of Accenture Strategy, and Global Lead of Accenture Predictive Health Intelligence and Accenture Intelligent Patient Solutions. He is a board member of the Massachusetts Biotechnology Council, with more than 25 years of experience in healthcare and life sciences.



Anne O'Riordan is the Global Industry Senior Managing Director of Accenture Life Sciences. Based in China, she has worked throughout Europe, the United States, and Asia for 25 years, helping pharmaceutical, medical technology, and consumer health companies deliver better patient outcomes.

*Healthcare Disrupted* is published by John Wiley & Sons (March 2016).

Copyright © 2016 Accenture  
All rights reserved.

Accenture, its logo, and  
High Performance Delivered  
are trademarks of Accenture.

For more information, visit [Accenture.com/HealthcareDisrupted](http://Accenture.com/HealthcareDisrupted)