



Future trends & opportunities in the health and well-being sector

JUNE 2024
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COPENHAGEN INSTITUTE FOR FUTURES STUDIES



The Institute at a glance



CIFS is an independent, non-profit **utures think tank**

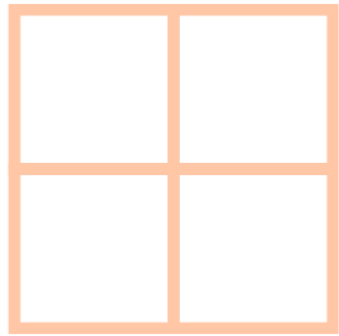
- founded in 1969 by former OECD Secretary General Torkild Kristensen

www.cifs.dk



Our activities

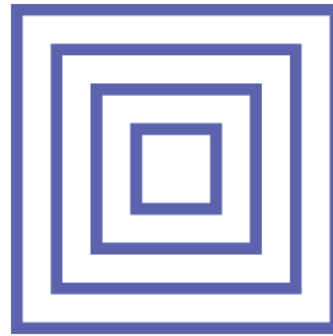
THE INSTITUTE AT A GLANCE



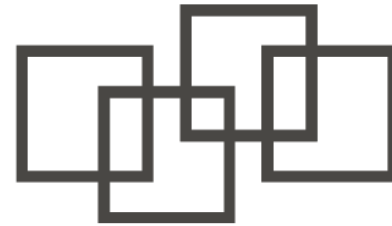
Advisory



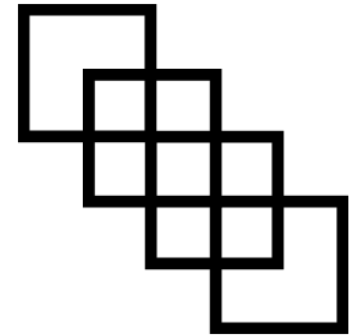
Publications



Talks



Courses



Initiatives



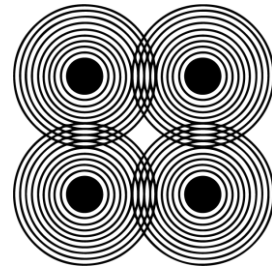
Our approaches

THE INSTITUTE AT A GLANCE



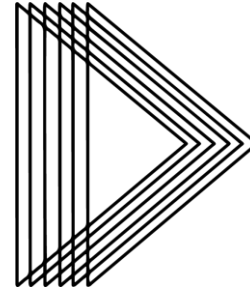
MEGATRENDS

Long-term trends influencing global societies. It is critical to understand how megatrends shape your organisation's future and plan for their consequences while building a successful strategy or scenario process.



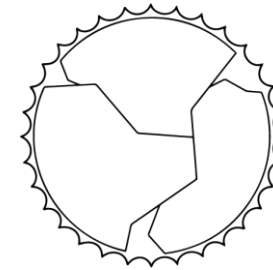
SCENARIO PLANNING

Structured and explorative approach used to **map the possible futures** that your organisation should be prepared to navigate. Scenarios frame your organisation's future environment.



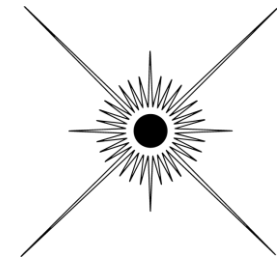
STRATEGY DEVELOPMENT

Planning to influence **your organisation's future in the desired direction.** We provide a solid foundation to help you define and shape your organisation's desired direction and actions to follow that path.



RISK MANAGEMENT

Building a future-proofing mindset requires monitoring developing strategic risks and opportunities, also beyond the usual time horizon. We help you **manage risks based on megatrend analyses and scenario planning.**



FUTURES-DRIVEN INNOVATION

Innovation must be closely linked to strategy and scenarios to **ensure long-term competitiveness in global markets.** Expectations about the future are central guideposts in developing innovation processes.



Megatrends



CONCENTRATION OF WEALTH



Economic inequality within countries are growing in many parts of the world, with more wealth being concentrated in the hands of fewer and fewer people

ECONOMIC GROWTH



The historical benefits of economic growth for society is clear, yet the future trajectories remain much less certain.

SERVICE ECONOMY



The shift toward freedom from ownership through everything-as-a-service as well as the rise of the platform business model.

NETWORK ECONOMY



The digitalisation of society gives rise to new peer-to-peer processes and decentralised networks.

ECONOMY

ENGINEERING ADVANCES



New materials, new energy sources, and improved product designs will change our lives in the decades to come.

GREATER INTERCONNECTEDNESS



The internet-connected devices help improve the quality of the products and services we depend on.

BIOTECH REVOLUTION



Biotechnology will likely be as important in the next half century as computers have been in the previous one.

AI & AUTOMATION



Advances in artificial intelligence and robotics will change not only how we work in the future, but also how we live, learn, and entertain ourselves.



GLOBALISATION

With globalisation comes both opportunities and risks, and regional issues or challenges quickly become global in scope.



POPULATION GROWTH

The world population will see an explosive growth throughout the 21st century and is expected by the UN to peak at 11 billion in 2100.



ENVIRONMENTAL CHANGE & SUSTAINABILITY

Earth's ecosystems are collapsing and sustainability seeks a balance between human activity and the environment.

PEOPLE & SOCIETY



AN AGEING WORLD

Improved longevity, improved health at old age, and declining birth rates is causing the world population to age.



INDIVIDUALISATION & EMPOWERMENT

The social structures and identity markers that have traditionally shaped our lives are losing their grip.



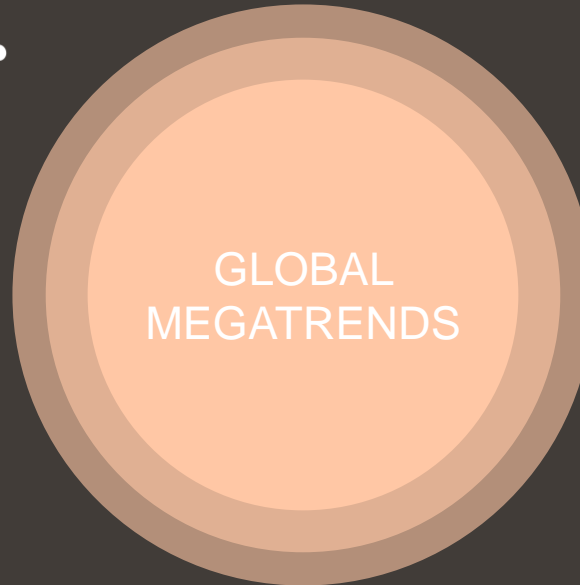
FOCUS ON HEALTH

A growing public and personal focus on health as well as a general shift in the idea of what it means to be healthy.



URBANISATION

In the future, urban areas will be much larger and more complex than today, and it is in cities that the global challenges of our century will need to be solved.





The Future of Health





TECTONIC SHIFTS

THE DEMOGRAPHIC SQUEEZE

- AGEING POPULATION WITH INCREASING DISEASE BURDEN PER CAPITA
- RISE IN NON-COMMUNICABLE DISEASES
- NUMBER OF PEOPLE WORKING SHRINKING
- BIRTH RATES STAGNATING OR FALLING

SYSTEMIC PRESSURE

- HEALTHCARE SPENDING INCREASING (ESPECIALLY LONG-TERM CARE)
- TECHNOLOGICAL INNOVATION DOUBLE EDGED SWORD (INCREASED EFFICIENCY BUT INCREASED COST AS WELL)
- BURNOUT – THE WORKFORCE ALSO CAN'T KEEP UP
- MENTAL HEALTH

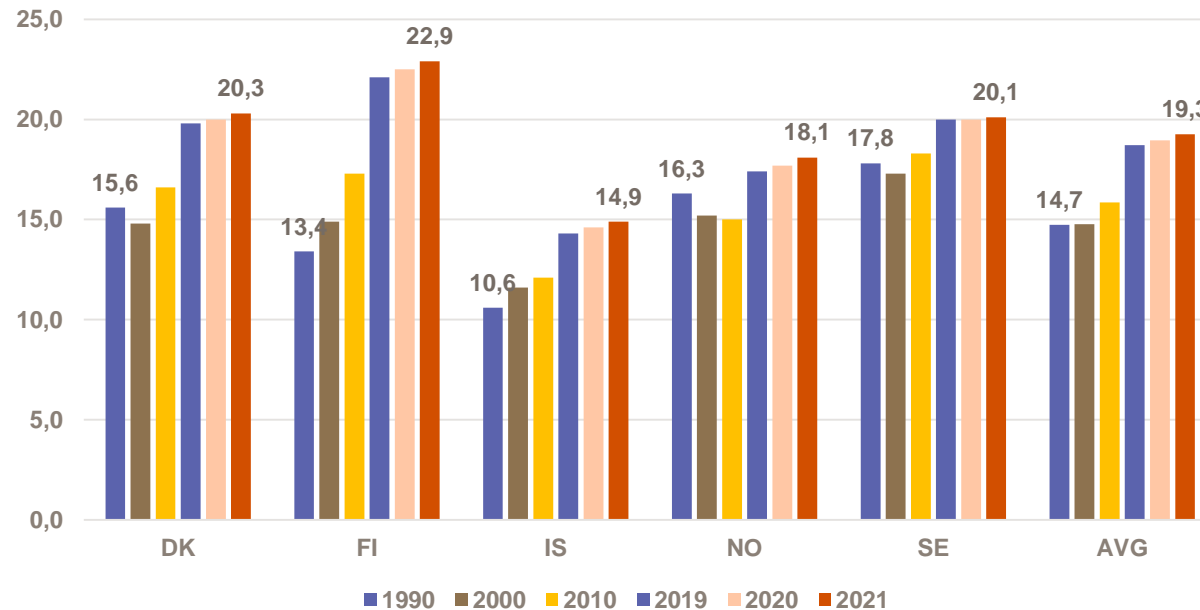
ACCELERATING FORCES OUTSIDE TRADITIONAL HEALTHCARE

- BIG TECH ENTRY INTO HEALTHCARE, INCLUDING AI
- NEW MORE GRANULAR UNDERSTANDING OF HEALTH AND BIOLOGY (GENOMICS)
- INCREASING DEMAND FOR PERSONALISATION/PRECISION IN HEALTH



19.3%

of population over 65 years old in the Nordic countries

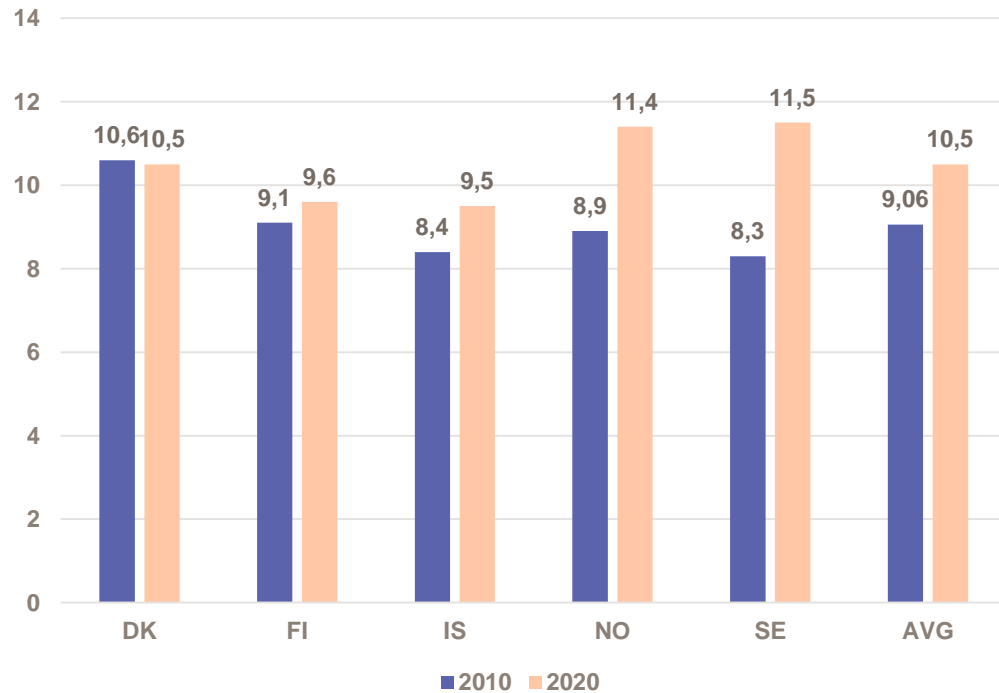


> 33% increase
since 1990



10.5%

of GDP spent on healthcare in the Nordic countries

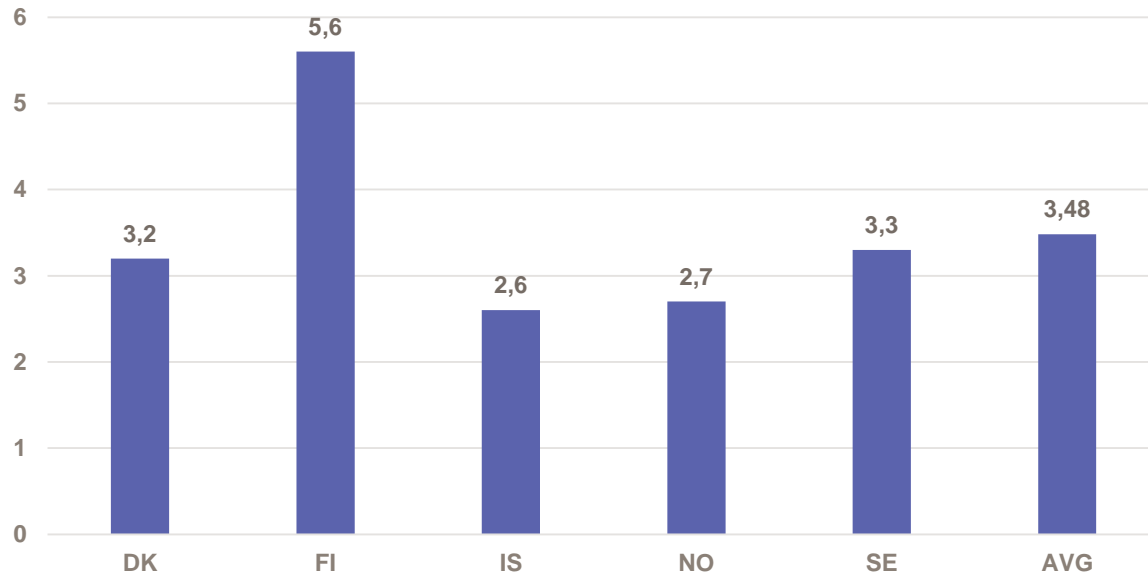


~17% increase
since 2010



Only 3.48%

of healthcare resources utilised for prevention in the Nordics in 2020





The burning platform:

Increasing disease burden

End-of-life solutions

Focus on disease

How do we change the system and our habits



INDEPENDENT



What do we want?

Prevention or treatment

Long life or good life

The best health system

or

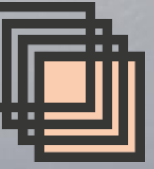
the healthiest Population



Need to take decisions – dilemmas

TWO POLARITIES- SELECTED ISSUES IMPACTING THE FUTURE OF HEALTH

POLARITY 1	Issues	POLARITY 2
<p>Best individual outcomes</p> <p>Research focus</p> <p>Providing treatment</p> <p>Competing agendas</p> <p>Privacy valued</p> <p>Passive in own health</p> <p>Lack of competencies & resources</p> <p>Limited implementation</p>	<p>Ethics</p> <p>Use of Omics & Biotechnology</p> <p>Systems' Approach to Health</p> <p>Personalised vs. Public Health</p> <p>Data Sharing</p> <p>Individual Behaviour</p> <p>Workforce Readiness</p> <p>Technical Interoperability</p>	<p>Best population outcomes</p> <p>Clinical focus</p> <p>Maintaining health</p> <p>Complementary agendas</p> <p>Convenience valued</p> <p>Active in own health</p> <p>Required upskilling provided</p> <p>Wide implementation</p>



Preparing for the future of health



Health in all Policies

- Holistic approach to health and public policy making
- Possibilities for integrated policy and public services
- Drawing attention to the far-reaching impacts of all policy on health and wellbeing
- Requires reprioritisation, long-term thinking, and inter-departmental and – jurisdictional collaboration

Source: Hall, R., Jacobsen, P. "Examining whether the health-in-all-policies approach promotes health equity."



Development and implementation of social policies in Ecuador – “the national good living plan”

Preparing for the future - Denmark





Life science strategy

- Life science strategies are used to navigate in the future
- Life science strategy must include all relevant stakeholders
- Ensure DK educates right people, can attract skilled staff, attracts investments etc.
- Provide optimal and equal health care to all patients

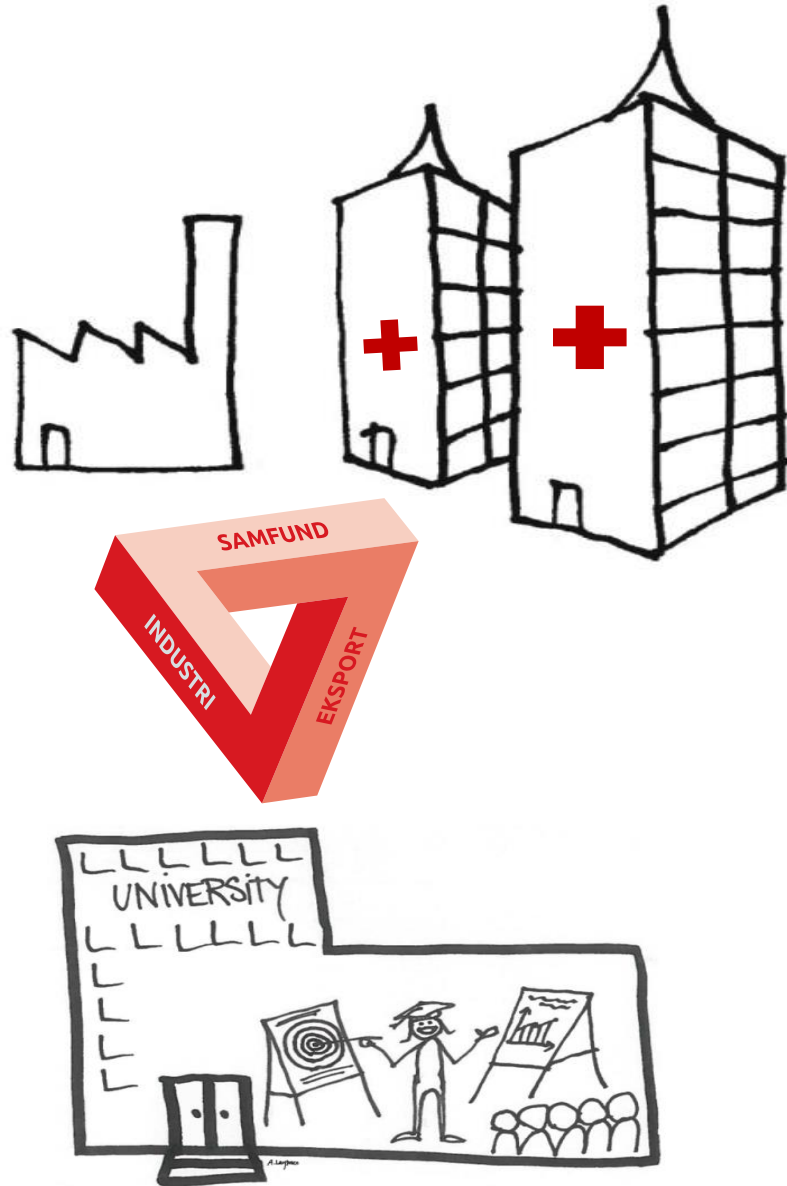


Strategy of Danish Life Science Cluster





Funding to support the strategy



- Goal to invest to sustainable future of health care system
- Common goals benefitting for the stakeholders
 - University:
 - Improved research
 - Attract students
 - Produce qualified workforce
 - Private:
 - New new high-tech products
 - Increase profit
 - Employment opportunities
 - Society/Public
 - POC-country creates better healthcare
 - Adapted legislation
 - More tax-income
 - Foreign investments



Clinical trials - example

Data from Denmark, 2015 and 2017

- **Economy**
 - Pharma companies spent €35M on capacity and quality improvements on DK hospitals
 - Each trial improved the Danish GDP by an average of €125.000
- **Economy/employment**
 - 387 additional FTEs in the public sector was paid by pharma companies running clinical trials
 - Clinical trials engaged 548 FTEs in the private sector
- **Research**
 - Clinical trials positively impacted research
 - Clinical trials initiated by the industry implicated new research
 - 35% of trials generate follow-on research within the same therapeutic area

Life science strategy 2017





Attracting clinical trials – Trial Nation Denmark

A goal mentioned in the 2017 strategy was to keep clinical trials in Denmark

- Trial Nation established 2018
- Supported by the Ministry of Industry, Business and Financial Affairs
- Public research and innovation grants
- Innovation Grants to pay public institutions to participate

Trial Nation Clinical Trials Denmark

TRIAL NATION MEMBERS





Keeping clinical trials in Denmark

2021 life science strategy was supported by public funding

The goal was to keep Denmark as an attractive place to conduct clinical trials

- **Megatrends:**
 - AI, Interconnectedness, Biotech revolution, Patient centered, Demographic squeeze, Systemic Pressure
- **Innovation projects:**
 - Health data projects
 - Decentralization of clinical trials
 - Clinical trials
- **Partners:** SMEs, enterprises, Hospitals GPs, Universities, Patient associations
- **Advisors:** Public entities like ethical committee, Health data authority, Medical agency

Maya

Sundhed
INVESTERINGSSTRATEGI FOR
INNOVATIONSFONDEN 2016-2018

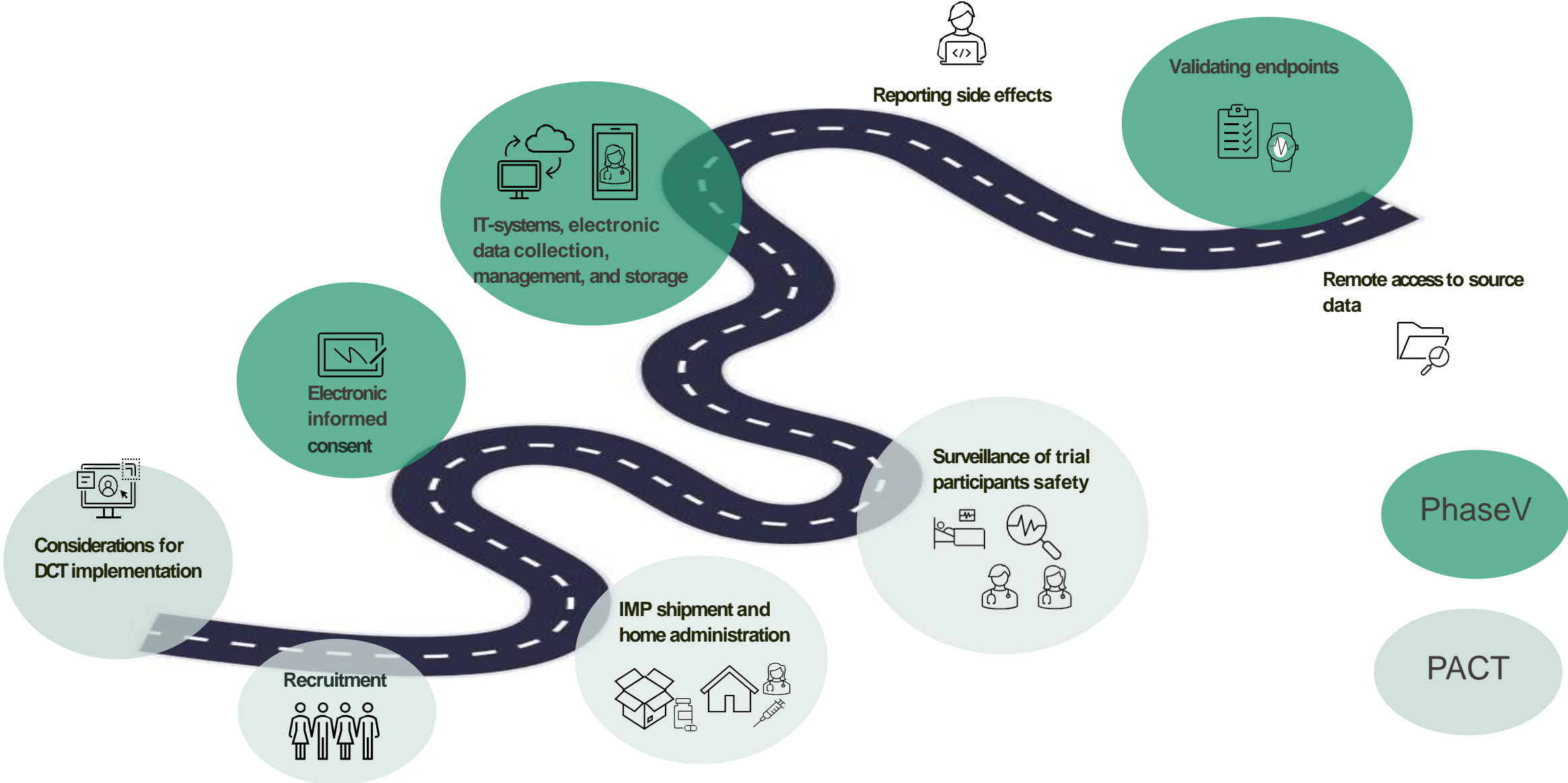
Agreement on
a strategy for
life science

Strategy of Danish Life Science Cluster

Strategi
for Danish Life

Trial Nation
Clinical Trials Denmark

Decentralized Clinical Trials



A hand is holding a silver smartphone horizontally. The screen is black with white text. The text includes a bold heading and two bullet points. The phone's physical home button is visible on the right side of the device.

Spotting the clinical trial trends

- What will impact the future of clinical trials
- Make processes to spot the trends affecting the future of clinical trials



“Vision without action is a daydream. Action without vision is a nightmare.”

Soichiro Honda

FOUNDER, HONDA MOTOR COMPANY

Thank you!

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