

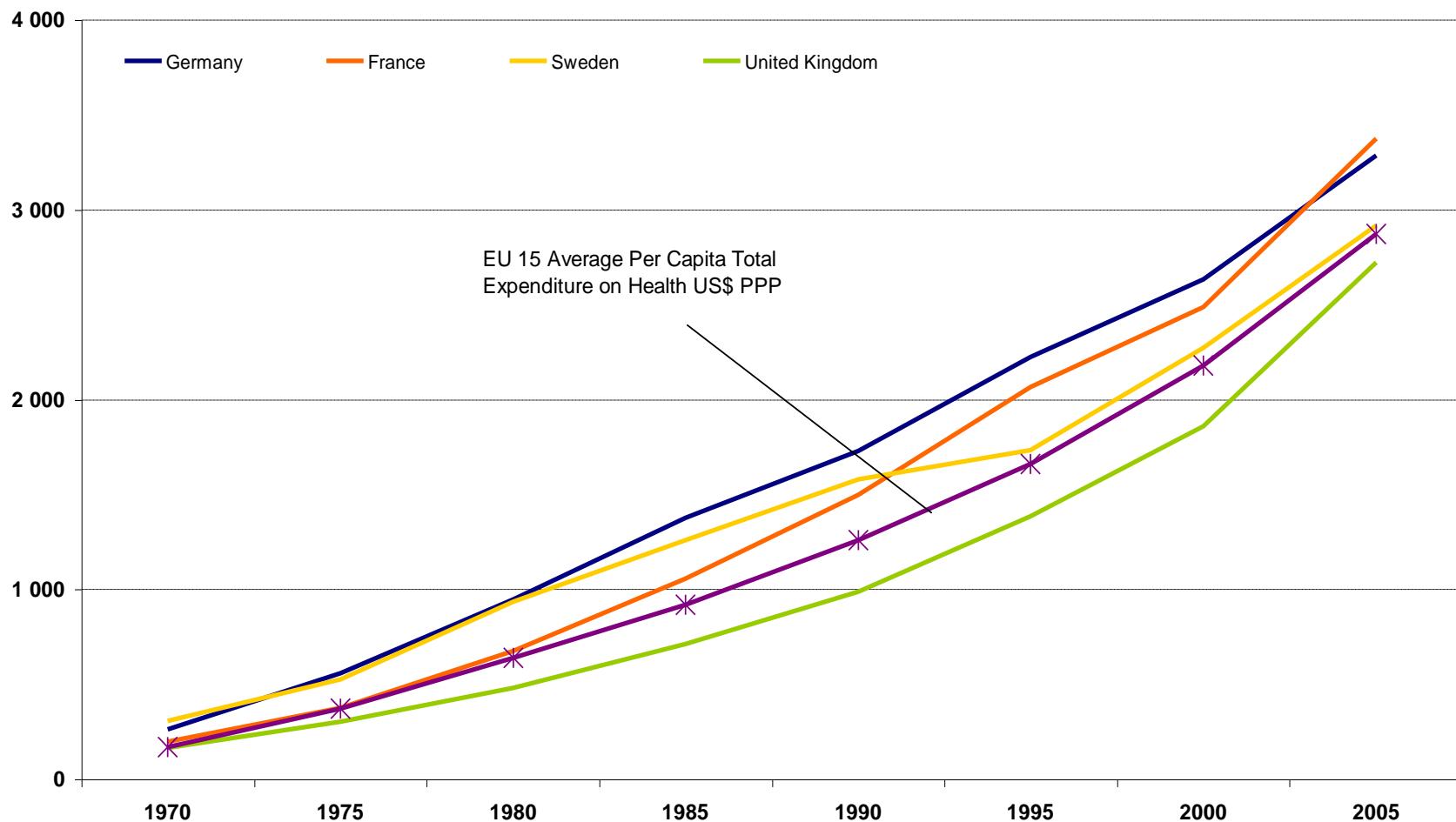
European healthcare systems

Brussels Healthcare
Roundtable, March 18 2009



Nominal Expenditure EU15

Total Expenditure on health in US\$ PPP and Per Capita Total Expenditure US\$ PPP
for EU15 - Million US\$, PPP



Cost-containment

= limiting supply
and controlling
demand

1. Reduced pharmaceutical spending	
2. Access to drugs	Reference pricing & spending caps
3. Access to treatments	“Patient pathways” “Gatekeepers”
4. Budget setting	
5. Cost-sharing	Patient charges & co-payments
6. Service re-design	E.g. GP fund-holding (UK)

Cost-containment

Results:

- Failed to curtail overall spending.
- Failed to improve productivity and health outcomes.
- Restricting patient choice and increasing patient costs.
- Increasing healthcare costs as a problem per se.

Budgets

France: Annual percentage increase in healthcare expenditure

	2001	2002	2003	2004	2005	2006
Out-patient dental care	13.2%	3.5%	7.2%	3.7%	-0.7%	3.9%
Medical goods dispensed to out-patients	10.3%	7.8%	6.8%	6.4%	5.1%	2.5%
Pharmaceutical and other medical non-durables	9.7%	7.0%	6.6%	5.9%	4.6%	1.8%
Prescribed medicines	9.6%	6.8%	6.5%	5.7%	4.5%	1.6%
Other medical non-durables	17.9%	13.4%	12.3%	12.4%	7.9%	7.9%
Therapeutic appliances and other medical durables	15.2%	15.0%	8.3%	11.0%	8.6%	7.5%
Research and development in health	7.5%	6.6%	0.3%	3.7%	1.7%	-8.7%

Assessing International Trade in Healthcare Services

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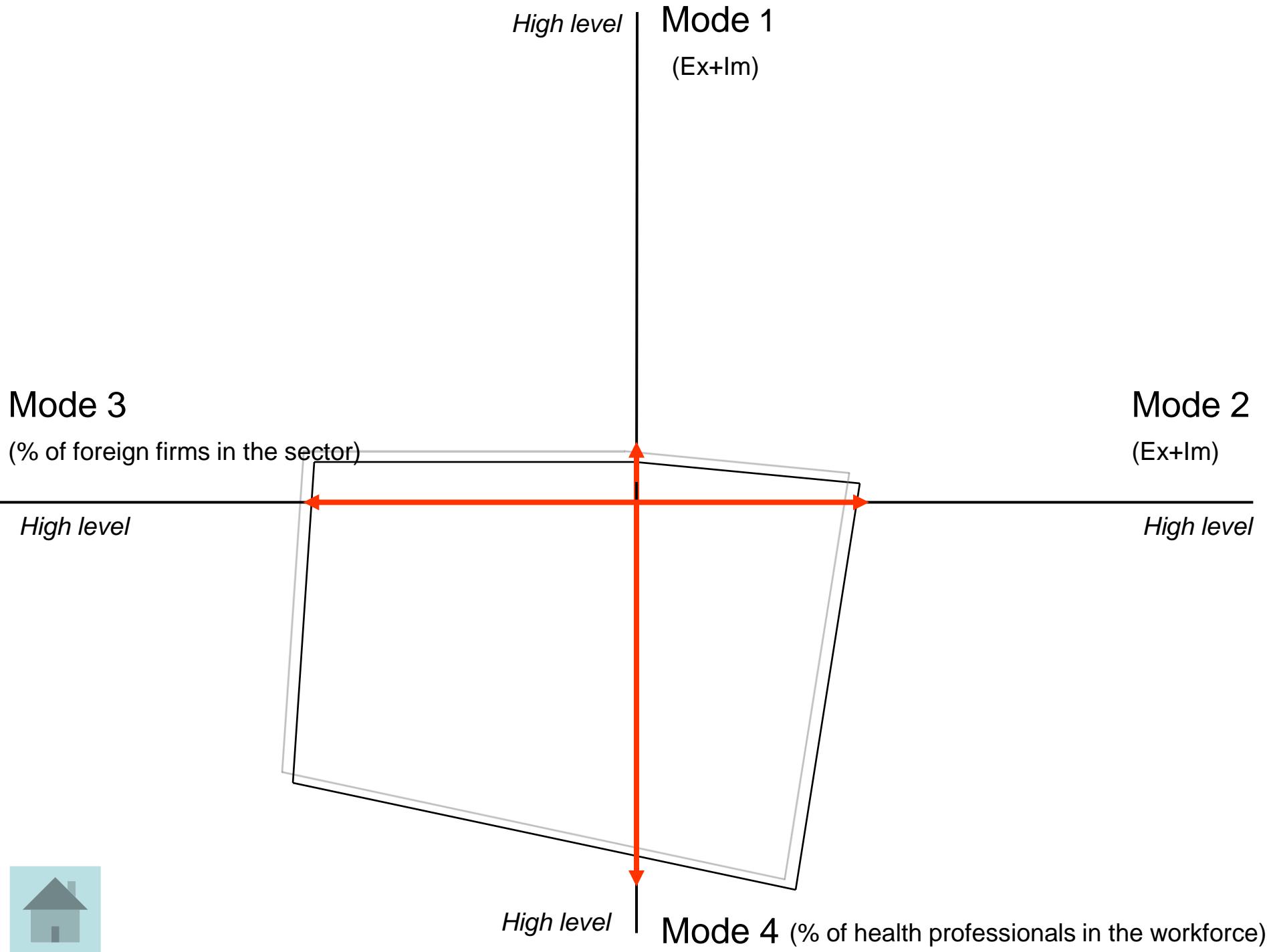
International Trade in Healthcare Services

- What is international trade in healthcare services?
- The level of trade differs significantly between modes of trade 
- Nevertheless, trade is growing fast
- Variation in trade directions  and specialisation patterns
- Large variation also with regard to trade concentration

Thank you for your attention

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Leading international healthcare trading countries

Ranking	Cross-border trade	Consumption abroad	Commercial presence	Movement of professionals
1	Italy	Germany	USA	Australia
2	Denmark	Switzerland	UK	Germany
3	Czech Republic	Belgium	Canada	India
4	Australia	Turkey		Ireland
5	UK	Canada		Norway
6	Poland	Hungary		Pakistan
7	Slovakia	Italy		Philippines
8	Slovenia	UK		South Africa
9	Cyprus	Czech Republic		UK
10	Romania	Korea		USA

