



Llywodraeth Cymru  
Welsh Government

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# A Government Perspective

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# The challenge:

## *Five Disruptive Forces in Combination*



Greying patient  
(and  
provider)



Rise of  
Chronic  
Disease



Information  
Revolution



New  
Medicines  
and  
Technology

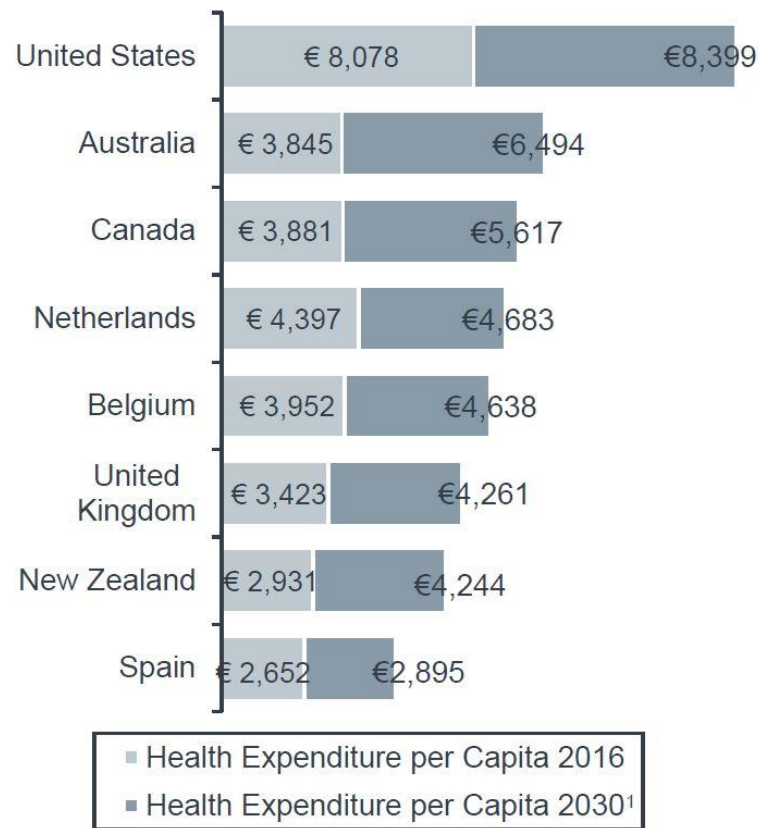


New Health  
& Care  
Consumer

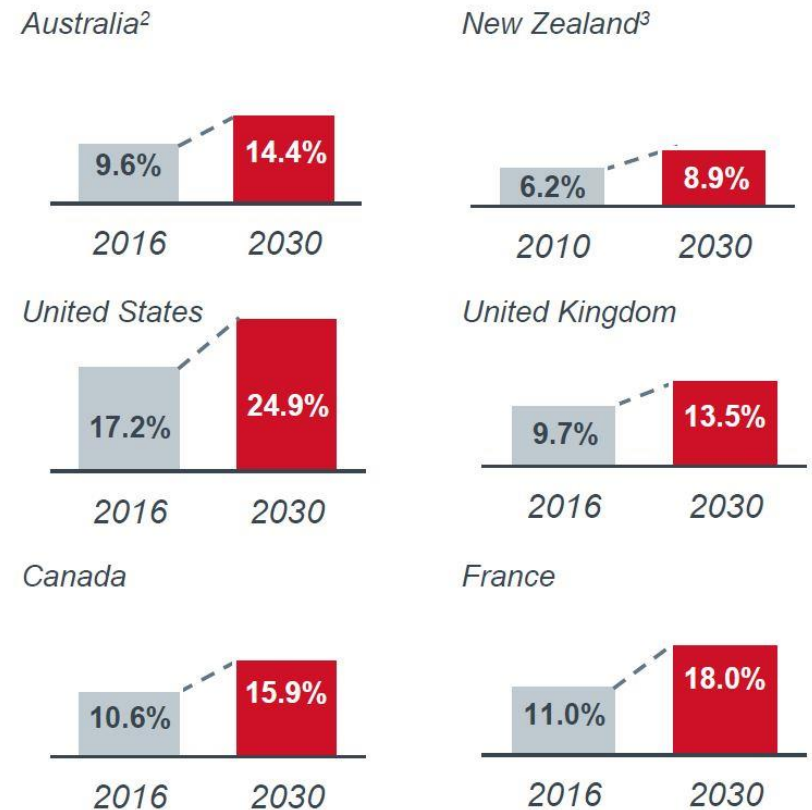
# The challenge: *Finances*

Global and will be relentless until the paradigm changes

Per Capita Health Care Spending



Health Expenditures as Percentage of GDP



Source: Cottarelli, C., "Macro-Fiscal Implications of Health Care reform in Advanced and Emerging Economies," IMF Fiscal Affairs Department, December 2010; McKinsey & Company, "mHealth: A new vision for healthcare," available at: [http://www.mckinsey.com/~media/mckinsey/dotcom/client\\_service/Initiatives/mHealth/mHealth\\_a\\_new\\_vision\\_for\\_healthcare.ashx](http://www.mckinsey.com/~media/mckinsey/dotcom/client_service/Initiatives/mHealth/mHealth_a_new_vision_for_healthcare.ashx); Office of Economic Co-operation and development, OECD indicators available at <https://data.oecd.org/healthres/health-spending.htm>

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**We need a new approach!**

# From illness... to Wellness





# From service-led... to people-focused



# From hospitals... to communities



# Innovation, technology and digital are key enabling themes





# All to deliver better outcomes

