



BusinessatOECD
Health Forum

Health as an Economic Imperative

Synthesis Report

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Established in 1962, *Business at OECD* (BIAC) is the officially recognized institutional business stakeholder at the OECD.

We stand for policies that enable businesses of all sizes to contribute to economic growth, sustainable development, and societal prosperity. Through *Business at OECD*, national business and employers' federations representing over 10 million companies provide perspectives to cutting-edge OECD policy debates that shape market-based economies and impact global governance. Our expertise is enriched by the contributions of a wide range of international sector organizations.

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Introduction

Health systems are fundamental to national security, economic productivity, and societal well-being. Resilient and prepared healthcare systems are cornerstones for sustainable development. Therefore, investing in health must be viewed as a strategic imperative for global security and economic growth. Recognizing health expenditures as investments with long-term societal and economic returns, rather than costs will be critical. To achieve this, trust and collaboration are essential for harnessing health as an economic catalyst, requiring concerted efforts across governments, the private sector, and civil society.

In today's context of global health challenges, the *Business at OECD (BIAC) Health Forum* convened OECD, global and national leaders, industry experts, and civil society on December 4, 2024, under the theme **"Health as an Economic Imperative"**. This flagship event provided a strategic platform to strengthen multi-stakeholder collaboration between the public and private sectors, align priorities, address key opportunities and challenges, and drive a shared agenda for impactful action.

Now in its 6th edition, the Health Forum has established itself as a key event amplifying the contributions of BIAC Health Committee members to advancing better health outcomes. It facilitates dialogue among policymakers, industry leaders, academics, and OECD representatives, exploring how health can drive economic growth while reinforcing the OECD's role as a multidisciplinary organization with deep expertise in health and related policy areas. This year's Forum further emphasized that integrating business perspectives and fostering cross-sector collaboration is essential to inspire impactful health-related initiatives.

Health is deeply interconnected with other policy areas and serves **as a foundational driver of national security, economic growth and societal well-being**. The Health Forum emphasized leveraging health as a strategic pillar for resilient economies. This report offers actionable recommendations for the OECD, incorporating insights from high-level panels and private sector consultations. It highlights the role of sustainable development and public-private collaboration, providing a roadmap for resilient health systems.

Post-Ministerial Progress:

Health at the Nexus of Economic and Systemic Resilience

Strengthening healthcare systems is a **key to building systemic resilience and fostering economic stability**. Health intersects with global challenges, such as aging populations and climate change, necessitating comprehensive, multi-sectoral collaboration. Governments, businesses, and international organizations must create robust, adaptable healthcare infrastructure for both immediate and long-term needs. The COVID-19 pandemic highlighted the importance of real-time data and communication, prevention efforts, robust supplies, and adequate Intensive Care Unit (ICU) capacity in managing crises effectively.

We believe that the role of health as a **multi-sectoral priority** extends beyond traditional healthcare domains. From its inclusion in COP28 discussions on climate change to advancing gender equity through ministerial commitments, health has proven its relevance across diverse policy areas. However, to maximize these benefits, there must be a deliberate shift away from siloed approaches toward more integrated, holistic multisectoral strategies that amplify the impact of health policies across sectors.

Addressing **workforce shortages** is a crucial priority given the aging population and declining interest in health-sector careers. To sustain patient care, and healthcare continuity, focusing on **increasing labor productivity** is essential. Health systems must adapt and embrace digital tools, artificial intelligence, and automation, to support and enhance their workforce. Fostering an environment that promotes innovation will help build resilience and ensure sustainable patient care amidst growing challenges. Trust in healthcare systems also is tantamount, with confidence in health providers, transparency in processes, and the responsible use of digital tools emerging as key factors in advancing health and well-being of populations.

Prevention also needs to become a foundation for the future of the health sector. **Prevention is not merely a health priority, but an economic imperative**, reducing healthcare costs and supporting fiscal stability. The economic benefits are clear, with tangible returns on investment that justify its integration into fiscal policies. A 'prevention first mindset'—widely endorsed by experts and stakeholders—should guide health strategies, ensuring proactive measures that reduce long-term costs and improve population health outcomes. Public-private partnerships can drive innovative and sustainable practices, enhancing system resilience and global competitiveness in health innovation. Investment in R&D and manufacturing ecosystem puts health as a strategic area for economic sovereignty, attracting private sector funding and driving advancements that benefit both health and economic systems. Long-term planning must therefore guide health investments, ensuring systems are prepared for future crises. By prioritizing sustainability and crisis preparedness, health systems protect populations from future shocks while maintaining consistent care delivery.

The challenge ahead is clear: invest in workforce resilience, foster trust, prioritize prevention, tackle waste and inefficiencies, and adopt innovative, science-based and data-driven approaches. Transforming health systems is essential not only for better public health but also a **strategic investment contributing to the economic and social resilience of our societies**. Establishing sustainable funding pools for workforce development, infrastructure improvements, and emergency preparedness is paramount, enabling health systems to navigate systemic challenges while safeguarding quality and accessibility. Through the stronger partnerships between governments and private sector, we can position health at the core of sustainable development.

What an enabling policy environment needs

- **Strengthen health data governance to enhance outcomes and efficiency.** Robust data governance frameworks are essential for harnessing the power of health data, enabling the use of AI solutions to improve health outcomes, optimize system efficiency, and drive innovation. Ensuring transparency, security, and ethical data use builds public trust and supports responsible decision-making.
- **Establish clear measures of ROI for health investments.** It is crucial to develop transparent frameworks for measuring and evaluating the return on investment (ROI) of healthcare initiatives—not only within the health sector but also in terms of their broader economic and social impact. Clear ROI metrics strengthen the case for sustained investment in health and demonstrate the value of health as a driver of economic growth and societal well-being.
- **Position health as a cornerstone of economic resilience.** To secure systemic sustainability, health must be recognized as a cross-cutting priority central to economic prosperity. For instance, long-term planning is crucial to this effort, requiring a forward-looking approach that anticipates demographic, technological, and epidemiological trends. Strengthening cross-government collaboration—through coordinated policies between health, finance, labor, and innovation ministries—can enhance the integration of health into economic and policy planning. By embedding health considerations into fiscal frameworks, including reshaping budget rules to encourage investments in health and private sector funding, governments can ensure resilience, equity, and preparedness for future crises.
- **Foster public-private partnerships to future-proof health systems.** Enabling an environment for dialogue and collaboration between public and private stakeholders ensures health systems are equipped to address today's challenges and anticipate tomorrow's needs. This approach promotes innovative solutions, operational efficiency, and shared accountability across sectors.
- **Align health with broader economic and environmental challenges.** Health policy must be adaptive to political risks and environmental changes, ensuring resilience in an evolving global context. Recognizing health's role in driving economic prosperity, particularly through investment in innovation and sustainable practices, strengthens its position as a vital component of systemic stability and sustainable development.

Rebalancing for Resilience:

Prevention-Driven Health Systems for Sustainable Growth

We need to move from a volume-oriented transactional health system rooted in episodic patient interactions to one in which care providers assume full responsibility for the quality and total cost of care for each patient and therefore prioritize high-quality, comprehensive and proactive care that over the longer term will deliver better outcomes to the people who use it at a lower cost. This value-based approach requires to reimagine the health system not as a place to triage the sick and spend money on care, but to enable and invest in healthier, more productive lives.

Reorienting around proactive prevention and early treatment of disease before it becomes more serious for patients' health and more costly requires an international emphasis on **primary care**, including telemedicine and home care, early detection and screening programs, life course immunization, and promoting active lifestyles. Keeping aging populations healthy alone contributes up to 1.4% of GDP globally, underscoring the economic value of prevention.

Value-based care models – in which care providers assume full responsibility for the quality and total cost of care for each patient – has been shown to deliver higher-quality care at lower costs than the traditional fee-for-service model. Peer reviewed research¹ shows that patients in fully accountable care model showed significant improvements over fee-for-service models in every metric examined in the study – from wellness visits and hypertension control to avoidable hospital admissions and readmissions.

Value-based care arrangements provide better patient and clinician outcomes at a lower cost

UnitedHealth Group's ambition – through Optum and UnitedHealthcare – is to help lead the transition to a health system where the needs of every patient, care provider and payer are fully aligned to deliver more coordinated, seamless care to every person where and when they need it at a lower cost. More coordinated care is provided by connecting patients to primary care earlier, effectively identifying and managing chronic conditions and slowing disease progression. To build such productive doctor-patient relationships there are incentives for doctors to understand patients and their needs and develop personalised prevention strategies in line with evidence-based guidelines. This transition is driven by data: more than 200 AI-enabled disease forecasting models which allow early detection and diagnosis of disease, clinical decision-support tools, and specific metrics that care providers must report on to demonstrate improvement to payers.

Today, UnitedHealth Group serves approximately 4.7 million patients in value-based care arrangements, and they are proven to have **better health outcomes** overall than those in fee-for-service models, including:

- 18% lower risk of an inpatient admission

- 11% lower risk of emergency department (ED) visits
- 44% reduction in hospital admissions for Chronic Obstructive Pulmonary Disease (COPD) or asthma complications
- 6% lower risk of inpatient acute admission from the ED
- 6% lower rate of return to the ED within 30 days
- 9% lower rate of 30-day hospital readmission
- 14% lower risk of avoidable ED visits
- 10% lower risk of admission for stroke or myocardial infarction (heart attack)
- Higher rates of annual wellness visits
- Higher rates of preventive screenings for conditions such as colorectal cancer
- 14% improvement in hypertension control

Value-based care is better for healthcare workers: Optum providers who practice value-based care have a **21% lower rate of burnout** than industry averages. **Value-based care saves system resources:** Total care costs for 65+ patients in the Optum fully accountable care Medicare Advantage models are **12% lower** than patients served by other providers. In 2023, a new Optum and UnitedHealthcare program to help small to mid-sized independent practices transition to value-based care reduced medical costs by more than 10% for thousands of patients with this group of providers. This effort is being expanded to reach 650,000 more people in commercial plans in 2025.

There are demonstrated returns on investment of 1:14 for general population prevention and 1:19 for adult immunization, when the full spectrum of economic and societal benefits is valued². Expanded vaccination points, particularly pharmacy-based vaccination services, help increase adult immunization coverage rates by offering convenient locations, extended hours, and walk-in availability, which reduces barriers to access and makes it easier for working adults to receive their recommended vaccines.

Unlocking the Full Potential of Immunization

Childhood vaccination was one of the greatest medical breakthroughs of the 20th century, saving millions of lives and delivering enormous socio-economic benefits. But we are falling short in extending these benefits across the lifespan. Adult immunization programs offer tremendous value, with new data from the Office of Health Economics (OHE) showing socio-economic returns up to 19 times their initial investment³. Yet adult vaccination remains underfunded and inconsistently prioritized, leaving many vulnerable populations unprotected.

The need for lifelong immunization is critical, particularly as aging populations face rising health risks. Deaths from antimicrobial resistance (AMR) have dropped by over 50% among young children since 1990, but they have surged by more than 80% in adults over 70⁴. Similarly, non-communicable diseases (NCDs) like cardiovascular disease, diabetes, and respiratory

conditions amplify the severity of infectious diseases, but targeted immunization programs can mitigate these risks, reduce complications, and alleviate healthcare burdens. Vaccines also play a pivotal role in combating AMR, reducing unnecessary antibiotic use, and preventing bacterial infections. WHO estimates that vaccines could avert over half a million deaths related to AMR, reduce antibiotic use by 22%, and save up to USD 30 billion in healthcare costs⁵. Investing in adult immunization supports not only better health outcomes but also stronger economic resilience. Healthier, older adults contribute more effectively to their communities, families, and economies. Additionally, adult immunization programs can contribute to health and economic equity within countries, particularly benefiting vulnerable populations and underserved communities⁶.

Another example is the Human papillomavirus (HPV) vaccine which has proven to be an effective tool in preventing cervical cancer and other HPV-related cancers in women and men, with the potential to avert over 27,000 cases and 12,000 deaths each year⁷.

Preventing even one-third of these costs could boost economic growth by approximately 1.3 to 1.7%, underscoring the economic value of preventive healthcare. The vaccine pipeline shows promise, with 80% of new candidates targeting adults, emphasizing the growing recognition of lifelong immunization as a cornerstone of healthy aging and sustainable growth.

Addressing the challenges of adult vaccination requires OECD and partner countries to expand data analytics to include life-course immunization, with disaggregated data by country, and age group (pediatric vs. adult). Stronger evidence-based policies, smarter funding, and a prevention-first approach can unlock the full potential of immunization, fostering healthier, and more resilient societies.

Additionally, we need to **align infrastructure, policy, and evidence-based evaluation** to build health systems that prioritize prevention. This includes fostering collaboration among health professionals, integrating innovative approaches with digital health innovations, and tailoring interventions to the evolving needs of societies, including issues like chronic diseases, obesity, mental health, and social inequalities. Investment in prevention will always pay off, and particularly if it begins early in life to maximize long-term benefits, with strategies that integrate generations, including keeping seniors active and healthy while addressing the needs of youth and families.

The Chronic Respiratory Index, developed by the Respiratory Health Initiative, is a comprehensive tool designed to evaluate and compare the approaches of different countries to managing chronic respiratory diseases, such as Chronic Obstructive Pulmonary Disease (COPD) and severe asthma. This index assesses various parameters, including health policy, access to and quality of care, clinical indicators, population health metrics, and environmental factors, to provide a detailed analysis of each country's performance. By highlighting best practices and areas for improvement, the index aims to drive policy action and enhance the standard of care for chronic respiratory conditions globally⁸.

Despite its recognized benefits, **prevention** remains chronically underfunded, with significant disparities in spending levels. While challenges such as quantifying ROI for non-pharmaceutical interventions exist, the primary issue lies in the lack of visibility of the impact of prevention in health budgets and the tendency to prioritize immediate treatment and cure rather than long-term prevention. Unlike entitlement programs or direct patient care, prevention initiatives are often seen as discretionary, making them particularly vulnerable to budget cuts during times of fiscal constraint. OECD already highlighted this vulnerability, especially during the 2008 financial crisis, showing how prevention efforts were deprioritized in favor of immediate healthcare needs. Addressing this imbalance requires a shift in perception, emphasizing prevention as a strategic investment that delivers both health and economic returns in the long term. According to the **World Health Organization's World Health Statistics 2024**, the global average life expectancy has seen a marginal increase, yet significant disparities persist between regions. The report also highlights that non-communicable diseases account for approximately **71% of all deaths worldwide**, emphasizing the need for robust preventive measures⁹.

Early detection: Lung cancer screening

The NELSON trial, conducted in Belgium and the Netherlands, has proved that screening for lung cancer with low dose CT could reduce mortality by at least 20% in a group of current and former smokers over 50 years of age¹³. Lung cancer is the 2nd most common cancer for European males and the 3rd most common for females. It is the leading cause of death for both sexes among all cancers. A recent analysis for the UK estimated the incremental cost-effectiveness ratio (ICER) would be 5.445 GBP for a QALY, which is firmly under the official threshold of 20.000 GBP representing an efficient use of resources¹⁴. As part of its EUR 4 billion beating cancer plan, the European Commission has funded specific efforts to stimulate the uptake of lung cancer screening among its member states. SOLACE has the goal to strengthen the uptake of lung cancer screening in Europe (www.europeanlung.org)¹⁵.

To address this, we must demonstrate the economic case for prevention and early detection, showcasing examples such as value-based care approaches and diabetes and cancer prevention programs that have delivered measurable cost savings and health improvements. Thanks to the emergence of Behavioral Science insights¹⁰, there are now scientifically based methodologies to enhance prevention campaigns impact (reach and effect on behaviors) which can be leveraged to ensure policymaking and prevention budgets generate a meaningful return on investment. Similarly, immunization in both children and adults illustrates how targeted prevention efforts can reduce healthcare costs, improve population health, and strengthen system resilience over time. Immunization holds a social value that extends beyond individuals' health benefits and impacts on the community at large, with broader societal well-being¹¹.

Digital innovation is a valuable tool for improving health outcomes through prevention and early detection of disease, with examples of using data to identify at-risk populations in population health management strategies, **improving early interventions**, and tracking measurable outcomes. To

unlock the power of health data and integrate these technologies in health system, it requires significant investments in the workforce and training of healthcare workers, supporting the emergence of new professions such as clinical informaticists, as well as a broader change management approach to adapt to new roles and tools and develop new pathways. This needs to be underpinned by a strong health data governance and investment in health data interoperability and cybersecurity.

Colorectal Cancer Screening in the European Union

Colorectal cancer (CRC) is one of the most preventable and treatable cancers when detected early, yet screening uptake across the European Union remains uneven. Evidence shows that organized CRC screening programs significantly reduce mortality by enabling early intervention, leading to higher survival rates and cost-effective healthcare outcomes. CRC benefits from well-established treatments when diagnosed at an early stage. Despite this, challenges persist, including disparities in screening access, awareness gaps, and variations in national policies. Strengthening EU-wide screening programs through improved awareness, accessibility, and data-driven approaches is essential to maximizing their life-saving potential¹⁶.

Promoting physical activity as a key driver of health must play an important part in designing preventive health systems. Despite the vast collection of evidence of the broad benefits of physical activity alongside reports¹² jointly published by WHO, OECD and others calculating a 1:4 economic and social return on investment, global trends indicate physical activity levels are in decline. There is a real threat that inactivity among young people will become a major financial and societal burden in the future as sedentary lifestyles become normalized. The evidence of the benefits of physical activity is clear and quantifiable, yet the role of physical activity as a cost-effective intervention to solve many of today's global challenges is overlooked. To implement effective policy-led action, it is crucial to not only heighten communication and awareness of these benefits across both public and private sectors but also to better understand and address the barriers to physical activity.

We must advocate for a **greater role in public engagement and health literacy**, emphasizing the need for effective communication strategies to raise awareness about prevention and foster stronger connections between health systems and communities. Health should be seen as both an individual and population-wide priority, ensuring equitable access to preventive care while addressing societal perceptions of healthcare. Maximizing the potential of health data and technology requires significant investment in workforce training, the development of new roles like clinical informaticists, and a strong change management strategy. This needs to be underpinned by a strong health data governance and investment in health data interoperability and cybersecurity.

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We must advocate for a **greater role in public engagement and health literacy**, emphasizing the need for effective communication strategies to raise awareness about prevention and foster stronger connections between health systems and communities. Health should be viewed not only at the individual level but also as a population-wide concern, ensuring equitable access to preventive care, while addressing societal perceptions of healthcare.

What an enabling policy environment needs

- **Enhance cross-sector prevention.** Foster collaboration between ministries of health, economy, education, business and infrastructure to align policies that promote whole-person prevention-focused health systems. Address social and economic determinants of health through joint health and social care approaches which identify at-risk populations and develop personalized strategies and multi-disciplinary care teams to support vulnerable groups. Tackle barriers to early detection, life-course immunization, and active lifestyles by creating integrated strategies that incorporate public awareness campaigns and community-based initiatives.
- **Strengthen health literacy** and empower patients to take care of themselves. Partner with education ministries to implement programs that teach health literacy, emphasizing the importance of preventive care such as regular check-ups, immunization, physical activity, etc. Public investment in communications campaigns should also focus on advancing high-quality health information, countering misinformation and building trust in health systems.
- **Move to a value-based healthcare model which prioritizes prevention and early detection and treatment of disease and embed it within broader health and economic systems.** Make healthcare providers fully accountable for keeping patients healthy. This will result in rebalancing existing health funds toward primary care, including prevention-focused initiatives, screening and early detection, and immunization, supported by data-driven strategies. Benefit-sharing schemes can contribute to have cohesive policies supporting investment in cost-effective solutions and re-directing part of the savings to other areas of need. Reshape financial frameworks and policies to emphasize the long-term health and economic benefits of prevention, fostering innovation and ensuring sustainable investments. Effective prevention requires not only funding but also robust governance, regulatory frameworks, and strategic policymaking to guide decision-making. Emphasize smart, adequate funding allocation to ensure strategic resource management and funding efficiency. By demonstrating the measurable returns of prevention, establish its critical role in national and international policy agendas.

- **Promote cross-generational and community engagement.** Design prevention strategies that address the needs of all age groups, from youth to seniors, ensuring inclusivity and intergenerational support. Encourage community-based initiatives to keep seniors active and healthy while involving families in immunization and preventive care programs that integrate collective responsibility in health systems and build trust.
- **Promote physical activity as a cornerstone of health.** Capitalize on the growing momentum for physical activity, with more people engaging in running, walking, and fitness across all generations. On this important topic, we released our [Position Paper on Physical Activity](#), titled the *“Transversal benefits for our people, our planet, our economy and more prosperous societies”*, emphasizing the importance of physical activity in health, especially for health prevention.
- **Foster equity through adult immunization to achieve coverage parity.** Prioritize both child and adult immunization programs to reduce health inequities and ensure equitable access to preventive care. Immunization is vital in maintaining household health, promoting active lifestyles, and delivering long-term economic benefits. Implement people-centered approaches that advance vaccine literacy, address the unique needs of underserved populations, improve healthcare delivery and foster inclusive health systems. Improve convenience of access to vaccination for adults through expanding to other healthcare professionals (e.g. pharmacists, nurses) the possibility of administering vaccines providing a clear governance framework and appropriate education.

Harnessing Technology and Artificial Intelligence for Sustainable Health Systems

Artificial Intelligence (AI) has been around for over 20 years, but its recent advancements are profound and require urgent and deeper consideration to improve the health sector. **Digital technologies and AI** are revolutionizing healthcare, offering transformative potential in several key areas by (i) **enhancing efficiency** by optimizing resources, improving productivity, and reducing healthcare costs; (ii) **improving patient care** by enhancing disease diagnosis, speeding up drug discovery, and personalizing treatment plans—such as using dynamic treatment algorithms that account for access, reimbursement, and the availability of new and off-patent medicines—to ensure the most effective use of available resources; and (iii) **fostering the creation of new technologies**, such as innovative medical devices and robotic assistance for clinical practices, which enhance both patient outcomes and workforce efficiency. However, we also face critical challenges in governance, ethical data usage, and patient trust. To ensure the widespread adoption of AI in health, we must ensure robust governance frameworks, ethical safeguards, and transparent systems to build confidence among stakeholders and the public.

Healthcare is part of critical infrastructure, and its cyber resilience is an integral part of health sector sustainability and, ultimately, economic resilience. Cybersecurity of health systems is essential for maintaining the confidentiality, integrity, and availability of data in healthcare, patient privacy, effective disease monitoring, and digital health services – all while ensuring their continuity. As a complex, data-heavy and quickly digitalizing sector, healthcare is uniquely vulnerable to cyberattacks, with potentially dire consequences for patient data and safety. Health data is intrinsic to the person and their identity. In the event of a data breach, a person’s health history cannot be reissued or replaced like a credit card number. Cyber attacks on health systems are costly: the average data breach in healthcare costs nearly \$11 million compared to the average cost of \$4.45 million on average across other industries. Cyber-attacks can impair the functionality of medical devices, leading to disruption in clinical care.

Just as approaches in healthcare have been shifting from intervention (treating the patients when they are sick) to prevention (keeping the patients well), cybersecurity in healthcare should also shift to “prevention first”. Instead of only focusing on responding to cyberthreats as they occur, health organizations should be equipped with the workforce, guidance, and cyber awareness to prevent breaches and incidents across the system.

Using AI to make healthcare work smarter for everyone

Powered by UnitedHealth Group's de-identified data sets, AI solutions can reduce clinician burnout and transform patient diagnosis. It enables to extract insights and actionable information that can help clinicians **predict the onset and progression of approximately 200 diseases**, leading to better patient outcomes. These models also help identify the sickest or highest risk patients and support healthcare providers in recommending the best course of action. Early indications in pilots and real-world studies with UnitedHealthcare and Optum Health show that **our risk prediction score has led to a 2.4x increase in the diagnosis of new medical conditions.**

Healthcare providers need to synthesise a lot of patient information from many different sources (consultation notes, diagnostic test results, referral letters etc.) before and after seeing a patient. We are delivering answers faster by using AI to close the gap between when patients or providers need information and when they receive it. **Using AI, we can alleviate the burden of inbox management for clinicians while ensuring timely replies and personalised care for patients. We also have tools to help clinicians transcribe notes and automatically draft patient record documentation following exam conversations,** improving follow-up care like referrals. For providers who may be conducting house calls, UnitedHealth Group uses AI/ML models to summarise patient histories from disparate data sources into one-page overviews and audio narratives. **(87% of AI-generated summaries are submitted with zero or minor edits).**

We must encourage both **secure** and **equitable access** to health data. AI has the potential to bridge gaps by enabling data-driven decision-making, however, challenges persist in ensuring interoperability, privacy, and trust. We must foster environments where data sharing is secure, structured, and consensual, with mechanisms that allow individuals to maintain control over their information. Balancing the need for innovation with legal clarity and compliance will be key to addressing these issues.

In addition, we truly believe that **collaboration across sectors**, healthcare providers, Governments, competent authorities, the private sector, and international organizations, is pivotal for scaling AI-driven solutions. Training and empowering healthcare professionals and other intermediaries to utilize these technologies responsibly, alongside patient education and inclusive governance, can amplify the impact of AI. Additionally, partnerships between health systems and other domains, such as transportation and climate, highlight the multidisciplinary potential of AI.

Finally, we should also note the role of **communication, marketing and social media**, which provide channels for promoting health literacy and prevention messages while ensuring accountability in addressing misinformation. We should strive for quality health information aligning messages with public health goals, using innovative platforms and tools to encourage healthier behaviors. Together, we look forward to these approaches to demonstrate how technology and AI can drive progress in creating resilient, patient-centered, and sustainable health systems.

What an enabling policy environment needs

- **Establish robust and responsible governance and ethical frameworks.** To build trust in AI, it is essential to have clear policies that govern data usage, privacy, and transparency. Ethical principles and governance structures must ensure AI applications in healthcare are accountable and align with the values of equity and fairness.
- **Link health to economic growth.** In other words, framing health as a business case to resonate with Ministries of Finance and relevant authorities for boosting productivity and national economies, and key indicators such as credit ratings, investments, etc.
- **Build cyber secure health systems.** Require a 'ring of steel' around critical care assets (eg medical devices, EHRs or legacy systems) in every health organization as their breach can impact patient safety and put the whole system at risk. Enforce minimum cybersecurity standards across the supply chain for manufacturers, regardless of size, and incentivize them to apply 'secure by design' principle for software and hardware development to simplify security for the end user. Strengthen co-operation and information sharing, facilitate the development of joint operating playbooks. Provide health sector specific guidance for healthcare organizations, ensure that these guidelines are integrated in procurement processes of healthcare organizations, and provide practical support how to implement these standards. Invest in cyber research through partnerships with academia and industry.
- **Promote data sharing with privacy safeguards.** Enabling secure, structured data sharing across health systems is key to unlocking the full potential of AI. We encourage policymakers to propose frameworks that allow individuals to control how their data is used while fostering trust and collaboration among stakeholders.
- **Empower healthcare professionals by addressing the skill gap as a key priority.** Include courses on AI and cybersecurity into curricula of medical schools. Upskill current healthcare workforce in safe, secure and responsible use of digital tools, including AI-powered solutions. Promote clinical informatics and cybersecurity as a career choice through public campaigns and education initiatives. Enhance current cybersecurity and AI education in healthcare by integrating academic programs and providing accredited continuous learning opportunities.
- **Leverage digital tools for health communication.** The private sector could work, in partnership with Governments, on platforms like social media to promote health literacy and prevention messages. Clear and responsible communication of AI's role in healthcare could increase public trust and encourage healthier behaviors across communities.

Investing in Health for Fiscal Efficiency and Economic Growth

Investing in health is fundamental to driving **fiscal efficiency and sustainable economic growth**. Strengthening preventative healthcare, such as immunization and health technologies, and considering innovative treatments demonstrates how targeted investments can reduce healthcare costs, enhance productivity, and improve both health and societal outcomes. Quantifying the short- and long-term returns on these interventions is key to making the case for policymakers to prioritize health as an investment rather than a cost. Health systems need to recognize that work and work-related activities are an important social determinant of health and that improving productivity, and incomes can impact not only other health domains but also improve economic outcomes, driving fiscal sustainability and economic growth.

Investing in Prevention: A Path to Resilience¹⁷

The EU New Economic Governance Framework (NEGF) provides an opportunity to classify healthcare investments—especially in prevention—as “social security investments,” similar to defense and digital and green transitions. This approach could increase flexibility in unstable economic conditions and increased spending in areas with positive effects on the health and well-being of the population.

European countries can mitigate the **future burden on their healthcare and welfare systems while promoting long-term economic and social resilience**. In the future, spending on preventive healthcare could be considered an “investment,” as it entails potentially higher growth and reduces future expenditure:

- In the short term, it is necessary for investments in prevention (particularly immunization) to be recognized as beneficial for long-term fiscal sustainability and granted greater flexibility within the Member States’ fiscal-structural plans.
- In the long term, new revised fiscal rules should exclude investments in prevention and immunization from the calculations of Member States’ deficit or debt levels when assessing compliance with fiscal rules.

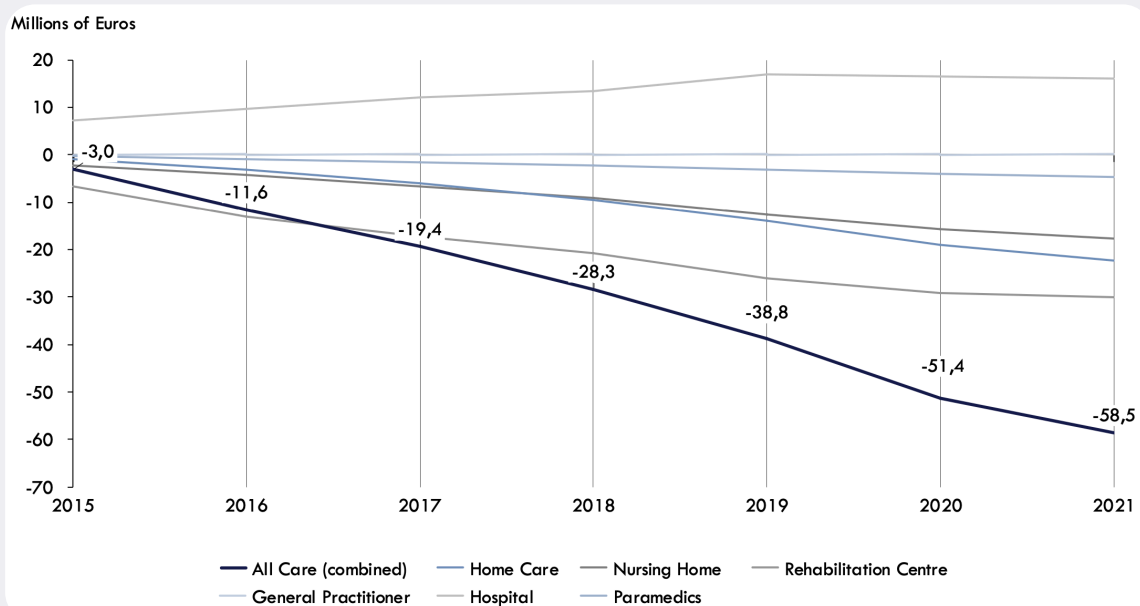
Value-based care and prevention offers **substantial benefits for fiscal sustainability**. Healthier populations reduce burden on hospitalizations, increase workforce productivity, boost tax revenues, and ease public budget pressures. Investments in mental health and lifestyle-based prevention, such as physical activity, further reinforce economic resilience by addressing long-term challenges and supporting workforce participation. Occupational medicine a vital role reducing workplace-

related health risks and improving well-being, and productivity. Integrating occupational health initiatives into preventive care strategies, helps address workforce needs and drive economic gains. Policymakers can integrate preventative care into health systems, improving immunization access, and emphasize programs for equitable health outcomes.

New technology saves resources: mechanical thrombectomy (MT) for better stroke care

Stroke is the leading worldwide cause for disability and a major source of mortality. Incidence in young and middle-aged populations is increasing. Total costs of stroke are estimated to exceed USD 912 billion and are expected to almost double in the next 25 years. Science and technology have now created hope for those affected with the most severe types of ischemic strokes. Mechanical Thrombectomy is a minimal invasive surgical procedure that reduces the disabling impact of stroke. Its' effectiveness is underpinned by large multicenter trials and the WHO has included MT in the Global NCD Action Plan. However, in 2019 fewer than 5% of eligible patients received MT globally²⁰.

Investing in advanced stroke infrastructure is also wise from a pure financial perspective. It reduces the need for expensive downstream services such as rehabilitation centers and nursing homes. The figure illustrates that MT as an add-on to usual care has led to savings in Dutch healthcare that add up to EUR 58 million in 2021²¹. Health systems that invest in the necessary infrastructure and skills will be rewarded with real savings if they redirect their payment models to capture such savings. Such investments also ease the pressures on future workforce shortages.



Cross-sector collaboration is essential for success. Governments, the private sector, academia, and local communities must work together to address barriers such as vaccine hesitancy, mis/disinformation, and inequities in access. Strengthening cooperation across the health ecosystem will foster trust in public health innovations and enable efficient responses to emerging challenges. Health systems and policies play a crucial role in the economy and society. The co-benefits of working among sectors are key to real progress, emphasizing the mutual benefits of health and other sectors collaborating toward win-win solutions¹⁸.

Health Technology Assessments (HTA) and data-driven models play an essential role in ensuring efficient resource allocation by **identifying cost-effective solutions and intervention**, as well as demonstrating the economic value of health investments. We believe that building robust data systems and empowering countries to collect data and assess the returns on investment in health-related areas, including education and climate, are necessary steps for aligning health systems with broader economic goals.

Health is not just a cost—it's a **strategic investment** that drives economic growth, strengthens workforce resilience, and unlocks fiscal space for innovation – fueling a virtuous circle. To address future challenges, health systems must embrace reforms, such as rethinking the key role of hospitals, especially in improving hospital care, and optimizing patient-centered pathways across the care continuum. Enhancing dialogue between health and finance ministries is particularly important for finding sufficient funds to pay for more resilient health systems given the current economic system¹⁹. Investing in health today, supported by robust governance and strategic collaboration, represents one of the **most fiscally prudent strategies** for achieving resilient economies and healthier societies.

What an enabling policy environment needs

- **Rethinking health systems and investments.** An enabling policy environment requires rethinking health systems and investment approaches to foster adaptability and efficiency. This involves moving beyond rigid health systems and traditional spending models to ensure health spending drives economic growth through smarter investments. In order to increase the ROI of those investments by the public and private sectors, a holistic and integrated health care pathway ecosystem should be in place that acknowledges the need for well-designed procurement systems, strategic funding and fit for purpose reimbursement processes as well as health service delivery systems and capacity infrastructure that promote universal health coverage. While a large portion of healthcare expenditure remains inflexible (e.g. salaries), inefficiencies and variations in medical practices result in significant budget waste—estimated at 20% on average—without improving outcomes. To optimize resource allocation, future policy frameworks should prioritize cost-effectiveness, return on investment (ROI), and cross-sectoral impact, enabling health systems to achieve better health and economic outcomes with broader societal well-being.

- **Maximizing Health Investments: From Waste to Economic Resilience.** To maximize health investments, inefficiencies must be addressed through strategic reforms that promote economic resilience. Cross-sector fiscal analysis can reveal broader costs of poor health, like higher pensions and disability expenses. Transparent budgeting, focused on outcomes with regular reviews, ensures efficient resource use. Value-based care models reduce hospitalizations by 18% and lower costs by 12% compared to fee-for-service models. Vaccines, with their high ROI, highlight the benefits of outcome-focused investments, though outdated frameworks still limit progress.
- **Adopting a prevention-first approach into economic strategy.** Rebalance budgets towards primary care to elevate preventative healthcare, screening, and early intervention, including immunization (child and adult) and mental health programs, as drivers of economic productivity and social well-being. Ensure prevention is fully funded and integrated into broader national economic strategies to reduce long-term costs, foster equity, and maximize returns.
- **Transforming incentives and accountability.** Realigning incentives is key to overcoming economic barriers to transformation and to enhance the effectiveness of public spending. Having fully accountable healthcare arrangements where care providers bear accountability for keeping patients well and emphasizing outcomes, such as patient-reported experiences along patient-reported outcomes measures, can guide resource allocation, identify areas of improvement and foster efficiency across sectors. The OECD's ongoing focus on these outcomes is a vital step toward creating health systems that prioritize value and sustainable impact.
- **Innovation-driven fiscal and health efficiency.** Leverage health technology and innovation to enhance efficiency within health systems, including using tools to evaluate cost-effectiveness and creating spaces for the private sector to develop and implement transformative solutions. An expansion of funding schemes and sources should be pursued, engaging with emerging stakeholders in the healthcare sector, such as Multilateral Development Banks. It is crucial to reap the benefits of technology and digital transformation of health systems (including AI) to support new delivery models and increase their value-for-money.
- **A forward-looking health strategy.** We encourage defining clear, long-term health goals, to align global and national policies with economic growth. This involves a comprehensive strategy linking health outcomes to fiscal sustainability, ensuring healthier populations contribute to extended workforce participation and overall economic resilience. Policies should incorporate a pragmatic understanding of fixed and variable costs in health systems, prioritizing investments that optimize fiscal efficiency and measurable returns.

Conclusion

Transforming our health systems to be more patient-centric, preventive, technology-enabled, collaborative, and economically sustainable is both an urgent priority and a shared responsibility. We have the power to take actions, **leveraging cross-sector innovation** and investing to foster health resilience as a cornerstone of economic growth.

The post-pandemic era demands health systems that are data-driven, efficient, and future-oriented, with **prevention, waste and inefficiency management, as well as innovation** at their core. We believe that this transformation cannot be achieved in isolation; it requires **partnerships and collaboration** — between Governments and businesses, across ministries, and with multilateral organizations. Together, we must ensure that health investments deliver lasting societal and economic returns, driving the sustainability and resilience needed to face future challenges.

Our Health Forum and the release of this report also mark the beginning of a new chapter in [Business at OECD \(BIAC\) Stronger campaign](#). Starting in 2025, our Health Committee will feature a series of regional roundtables and annual forums aimed at informing and shaping the OECD's Health agenda, positioning BIAC and the private sector as trusted partners for global opportunities.

The Business at OECD (BIAC) Health Committee is dedicated to working with the OECD and health sector stakeholders to tackle current health policy challenges. Through our Health Forum and this report, we aim to guide the OECD in addressing these challenges and creating a plan for meaningful action. By including these insights in the OECD discussions, we can develop a strong, collaborative health program that focuses on resilience, equity, and working closely with the private sector.

Annex:

Additional business priorities for the consideration of the OECD

Health Security and Crisis Preparedness

Particularly focus on the nexus between health and security to enhance preparedness and response to global crises. Pandemics and health emergencies have far-reaching impacts on economic and social stability. OECD should encourage integrated health-security policies and promote global collaboration for better resilience. OECD should support the development of **integrated health-security frameworks** that focus on:

- **Pandemic preparedness:** through early-warning systems and rapid response mechanisms and exchange of information on demand and supply.
- **Supply chain resilience:** encouraging development of coherent policies which aim to prevent disruptions in critical medical supplies.
- **Investment in national and cross-border health security infrastructure:** ensuring coordinated responses to future global health threats. By embedding health security into broader economic and national security policies, governments can mitigate systemic risks and build long-term resilience.
- **Strengthening global response and medical supply chains:** encourage project on multilateral cooperation in health crises. By analyzing recent experiences, the OECD and healthcare industries can identify best practices to enhance coordination and ensure the resilience of health systems.

Health Data and Digital Infrastructure

While AI and digital health are acknowledged in the main report, the **underlying need for robust, interoperable data systems** remains a significant gap. Our economies should particularly focus on leveraging health data as a cornerstone for driving innovation and evidence-based decision-making. High-quality data enables better research, policy design, and patient outcomes. Understanding and addressing data gaps requires innovative approaches in prevention and care. OECD should advocate for interoperable data systems while ensuring privacy and ethical use.

- **Investment in real-time, AI-driven analytics:** aiming to improve disease surveillance, patient care, and healthcare system efficiency.
- **Improve data availability and quality:** Efforts should focus on making data accessible for research while ensuring robust privacy protections, staff training, and security controls.
- **Harmonization of health data governance standards:** ensuring cross-border interoperability while maintaining privacy and security. OECD should create practical resources for policymakers and private sector stakeholders to facilitate data governance implementation.

- **Stronger public-private partnerships:** to drive responsible innovation in digital health technologies, ensuring equitable access to digital tools. Well-structured, ethical, and **interoperable health data systems** will serve as the foundation for evidence-based decision-making and future-proofed healthcare models.

Value-Based Healthcare and Financial Sustainability

Value-based healthcare (VBHC) should be recognized as a key pillar of OECD's work on health spending and financial sustainability. A shift towards patient-centered, value-based and outcome-driven healthcare could lead a more effective, efficient, and financially sustainable health services. Considering the cross-cutting and multidisciplinary nature of health spending sustainability within governments, OECD could explore the development of a new Recommendation that fosters a whole-of-government approach and multistakeholder engagement in transforming the health sector.

- **Leveraging OECD's Patient-Reported Indicator Surveys (PaRIS):** PaRIS data should serve as a core indicator to assess, track, and support the implementation of VBHC across countries.
- **Strengthening the recognition of VBHC:** OECD should use platforms such as the Ministerial Council Meeting (MCM) or a formal Recommendation to drive broader adoption and integration of VBHC into national health policies.

Health's Intersection with Other Sectors

The full economic and social potential of health extends beyond direct healthcare investments. Governments should particularly focus on linking health with other sectors, such as economy, education, environment, and labor, among others, to promote integrated policy solutions. OECD should advocate for cross-sectoral collaboration, including between national ministries and international organizations, to address the potential of health to grow and maximize policy impact. OECD could promote **cross-sector collaboration** to integrate health into:

- **Education:** Embedding health literacy and preventive care in school curricula to foster lifelong well-being.
- **Labor & Economic Policy:** Addressing the health-productivity nexus, ensuring policies recognize the economic gains from workforce health investments.
- **Climate & Sustainability:** Developing policies that mitigate **climate-related health risks**, such as heat-related illnesses and air pollution-induced respiratory diseases. By advancing **integrated, whole-of-government approaches**, OECD can position health as a foundational pillar for **long-term economic, environmental, and social stability**.

Public-private partnerships for sustainable health systems

Thriving public-private partnerships (PPPs) can create sustainable and innovative health systems, where collaboration between governments, businesses, and civil society can leverage resources and expertise for shared health goals. While the main report highlights collaboration, there is a need for structured, outcome-driven partnerships that go beyond dialogue and lead to measurable impact. OECD should facilitate dialogue between sectors to promote best practices and create both effective partnerships and encourage competitiveness:

- **Co-investment in health infrastructure and innovation:** Developing financing models that de-risk private sector investment in healthcare solutions, such as new treatment technologies, digital health platforms, and resilient supply chains.
- **Structured, long-term PPP frameworks:** Establish clear governance, accountability, and risk-sharing mechanisms to ensure partnerships deliver value-based healthcare outcomes.
- **Aligning incentives between governments and industry:** Policies in their design should reward innovation, promote equitable and affordable access to new therapies, and ensure that private sector involvement enhances, rather than replaces, public health investments.
- **Knowledge-sharing and best practices:** OECD can act as a convening platform to scale successful PPP models, allowing countries to learn from high-impact partnerships that improve health system efficiency and resilience.

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