SITRA

WORKING PAPER

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THE FINNISH HEALTH SECTOR GROWTH AND COMPETITIVENESS VISION 2030

Petri Lehto
Leading specialist
Sitra

Saara Malkamäki
Specialist
Sitra

The vision for Finnish health care by 2030 will create new prospects for the growth and competitiveness of the sector. By then, our healthcare system will have become truly preventive and personalised, while containing health service costs. This can be achieved through the improved use of health and social data, digital solutions and new technologies. Reforming healthcare will generate new skills and expertise that will make Finland one of the most attractive international hubs of healthcare development. Close private-public sector co-operation, enabling legislation and the determined use of public research, development and innovation funding are key to attaining the vision. The Finnish health sector will grow strongly.

We need the vision so as to turn our focus from the acute challenges now facing healthcare towards long-term opportunities. It is aimed for decision-makers responsible for the healthcare reform but also those working in the healthcare sector on whose efforts the practical implementation of the reform work depends. A shared vision creates a positive and encouraging outlook for the future, where healthcare reform will improve health services and enable preconditions for economic growth.

The vision has been developed as part of the Health Data 2030 project, which aims to build solutions and bridges for the cross-border use of health data in Europe and to support the development of the competitiveness of the Finnish health sector.

Sitra working paper

The Finnish health sector growth and competitiveness vision 2030

Writers: Petri Lehto and Saara Malkamäki

Working group: Copenhagen Institute for Futures Studies: Bogi Eliasen, Manya Lind, Peter Aadal Nielsen, Aron Szpisjak, Joe-Max Wakim and José Manuel Jerez Pombo; and from Sitra Taru Ryske, Markus Kalliola and Kristo Lehtonen in addition to the writers

Sub-editor: Kirsi Suomalainen, Communications Lead, Sitra

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Preface

In recent years, steps have been taken in Europe towards improving the utilisation of data and establishing common rules for the data economy. In addition to technological developments, the driving force behind this has been the European data strategy published in 2020, which has also identified key measures on health, such as legislation for a European Health Data Space.

European developments are combined with work in individual EU Member States. Finland has been among the first countries to put health data to practical use. We now have the opportunity to assess the benefits of data for the development of our healthcare, taking into account both the national starting points and European developments. The vision for the Finnish health sector described in this publication was prepared by Sitra together with health sector stakeholders. The vision can also serve as a model for other countries that are assessing the benefits of data in healthcare and want to maximise the benefits of the European data economy.

The Finnish healthcare system is currently undergoing its biggest ever reform. Following a long period of preparation and various stages, the reform process was completed when the new wellbeing services counties started their work at the beginning of 2023. The reform centralised social welfare and healthcare services, previously the responsibility of nearly 200 municipal authorities, into 21 wellbeing services counties. The previously fragmented administrative structure of healthcare was unified, and primary care and specialised care were integrated. At the same time, the process of merging social welfare services and health services began. This is the start of a highly ambitious endeavour that can transform social welfare and healthcare services to better meet people's individual needs and contain costs.

Healthcare reform cannot succeed without an open-minded approach to new technologies and data. They are the only way to ensure that the human resources required for healthcare are sufficient, to develop more personalised services and to maintain sound financial management. Fortunately, Finland is in a surprisingly favourable situation in this respect, as we have achieved significant progress in the digitalisation of healthcare over the years, while developing new capabilities to use health data. We therefore have the tools to carry out the necessary reforms in a way that we can credibly expect to deliver the solutions we need.

Finland is not alone in its reform efforts. The cost pressures of an ageing population must also be addressed in other countries. Ideally, being a pioneer in this area can provide Finland with significant advantages: we will be among the first to learn how to solve the challenges, which will increase our expertise and our ability to benefit from the reform. The development of healthcare requires a strong private sector contribution, which can strengthen the position of our companies in international markets and increase research and industrial investment in Finland.

For the benefits to materialise, we need a firm strategic approach to development. The Health Sector Growth Strategy for Research and Innovation Activities provides us with a tool to do this. Created in 2014, the strategy has been implemented over several terms of government and has delivered a wide range of reforms to boost research and innovation in the sector.

Nevertheless, the strategy needs to be updated to reflect our changing environment. The first step is to create a future-oriented vision. To take advantage of the opportunities, we need to have a vision of the future of the health sector that we can aspire to and that will guide our development.

8 June 2023
Markus Kalliola
Project Director, Health Data 2030, Sitra

Summary

Healthcare worldwide currently faces both threats and opportunities. Digitalisation, new technologies and health data point to a bright future for the development of treatment. Future healthcare will be able to address, in a personalised and preventive way, diseases that we previously considered beyond hope. At the same time, we see the cost of treatment rising to levels that society cannot afford.

The threats to healthcare can preclude us from looking to the opportunities that lie ahead. In the Finnish debate the emphasis is on threats rather than opportunities. Many countries have created national strategies purposefully focused on creating the prerequisites for seizing opportunities, especially to benefit economically from new developments. Finland started to do this with the Health Sector Growth Strategy for Research and Innovation Activities in 2014. Three governments have included the realisation of the strategy in their programmes.

The health sector growth strategy was aimed above all at improving the cohesion and co-ordination of activities in the health sector, bringing them under one plan to guide common action. But the operating environment has since changed significantly. The creation of the well-being services counties and the rise of the importance of health data create a very different framework for measures to promote the growth of the sector.

The health sector growth and competitiveness vision 2030 creates a new vision for the future. It is needed because changes in the operating environment require a longer perspective in terms of what is needed for the future than a single term of government. A significant number of health sector organisations and individuals participated in drawing up the vision in autumn 2022.

The vision builds on Finland's potential to create practical benefits using digitalised healthcare and health data. According to the vision, by 2030 Finland will have reformed its healthcare as an international trailblazer, ahead of the curve in health data and digitalisation.

Our health services will be both personalised and cost effective. Preventive healthcare will have gained a larger role in healthcare budgeting compared with disease treatment.

Healthcare reform will have created new skills and competences in the sector, which in turn will have significantly boosted growth in exports, investment and the number of companies in the sector. Our leading position in adopting and implementing EU health data initiatives will have benefited both our healthcare sector and our businesses. Finland could provide the most attractive hubs for healthcare research and innovation and be an important partner in collaboration.

The measures needed to realise the vision emphasise the importance of enabling legislation, financial incentives for research, development and innovation, and public-private partnerships. The health sector growth strategy will serve as a tool to achieve this vision.

Tiivistelmä

Terveydenhoito kohtaa parhaillaan kaikkialla maailmassa sekä uhkien että mahdollisuuksien näkymän. Digitalisoituminen, uudet teknologiat ja terveysdata osoittavat hoitojen kehittymisen kannalta kohti valoisaa tulevaisuutta. Tulevaisuuden terveydenhoito kykenee ratkaisemaan yksilöllisesti ja ennaltaehkäisevästi aiemmin toivottomiksi luokittelemiamme sairauksia. Samalla edessämme piirtyy kuva nopeasti kasvavista hoidon kustannuksista, joihin yhteiskunnalla ei ole varaa.

Terveydenhuollon uhkakuvat voivat estää katseen kääntämistä kohti edessä aukeavia mahdollisuuksia. Suomalaisessa keskustelussa uhat korostuvat mahdollisuuksien sijaan. Monet maat ovat laatineet kansallisia strategioitaan, joilla on pyritty määrätietoisesti rakentamaan edellytyksiä mahdollisuuksiin tarttumiseksi, etenkin hyötymään kehityksestä myös taloudellisesti. Suomi ryhtyi tähän vuonna 2014 valmistuneen Terveysalan tutkimus- ja innovaatiotoiminnan kasvustrategian myötä. Kolme hallitusta on omassa ohjelmassaan toteuttanut strategiaa.

Terveysalan kasvustrategian avulla pyrittiin ennen kaikkea tuomaan yhden suunnitelman ja yhteisen tekemisen alle hajallaan olevaa, koordinoimatonta terveysalan toimintaa. Toimintaympäristö on kuitenkin muuttunut merkittävästi tämän jälkeen. Hyvinvointialueiden muodostaminen ja terveysdatan merkityksen nousu luovat hyvin erilaiset puitteet alan kasvua vahvistaville toimenpiteille.

Terveysalan kasvun ja kilpailukyvyn visio 2030 luo uuden tulevaisuuskuvan. Se on tarpeellinen, koska toimintaympäristön muutokset edellyttävät yhtä hallituskautta pidempää näköalaa tulevaisuuteen vaadittavien toimenpiteiden osalta. Merkittävä määrä terveysalan toimijoita osallistui vision laadintaprosessiin syksyllä 2022.

Visio nojaa Suomen mahdollisuuksiin kääntää hyvät digitalisoituneen terveydenhuollon ja terveysdatan hyödyntämisen valmiutemme käytännön hyödyiksi. Vision mukaan vuoteen 2030 tultaessa Suomi on uudistanut terveydenhuoltoaan kansainvälisenä edelläkävijänä terveysdata ja digitalisoituminen edellä.

Terveyspalvelumme ovat sekä yksilöllisiä että kustannustehokkaita. Ennaltaehkäisevä terveydenhoito on saanut kasvavaa jalansijaa terveydenhuollon budjetissa suhteessa sairaanhoitoon.

Terveydenhuollon uudistaminen on synnyttänyt alalle uutta osaamista, joka on siivittänyt alan viennin, investoinnit ja yritysmäärän merkittävään kasvuun. Johtava asemamme EU:n terveysdata-aloitteiden toteutuksessa ja käytäntöön viejänä on hyödyttänyt terveydenhuoltoamme ja yrityksiämme. Suomesta on muodostunut yksi kiinnostavimmista terveydenhuollon kehittämisen kansainvälisistä keskuksista ja olemme haluttu kansainvälinen yhteistyökumppani.

Tarvittavat toimenpiteet vision saavuttamiseksi korostavat mahdollistavan lainsäädännön, tutkimus-, kehittämis- ja innovaatiotoiminnan rahoituskannustimien sekä julkisen ja yksityisen sektorin yhteistyön merkitystä. Terveysalan kasvustrategia toimii välineenä visioon pääsemiseksi.

Sammanfattning

Hälsovården i hela världen står just nu inför både hot och möjligheter. Digitalisering, ny teknik och hälsodata visar vägen mot en ljus framtid när det gäller utvecklingen av ny vård. Den framtida hälsovården kan hjälpa vid sjukdomar som vi förr ansett vara hopplösa på ett individuellt och förebyggande sätt. Samtidigt framträder bilden av vårdkostnader som ökar i snabb takt och som samhället inte har råd med.

Hotbilderna i hälsovården kan hindra oss från att lyfta blicken mot de möjligheter som öppnas upp framför oss. I den finländska diskussionen betonar man hoten istället för möjligheterna. Många länder har utarbetat sina nationella strategier som har använts för att bygga förutsättningar för att ta tag i möjligheterna på ett målmedvetet sätt, och särskilt för att gynnas ekonomiskt av utvecklingen. Finland tog tag i detta i och med Tillväxtstrategin för forskning och innovation inom hälsobranschen som blev färdig år 2014. Tre regeringar har genomfört strategin i sina egna program.

Med hjälp av tillväxtstrategin för hälsobranschen strävade man framför allt att sammanföra oorganiserad verksamhet inom hälsobranschen under en enda plan och gemensamma aktiviteter. Omvärlden har emellertid förändrats betydligt efter detta. Välfärdsområdena och den ökade betydelsen av hälsodata skapar mycket annorlunda förutsättningar för åtgärder som stärker tillväxten i branschen.

Visionen för tillväxt och konkurrenskraft i hälsobranschen 2030 skapar en ny framtidsbild. Den är nödvändig eftersom förändringarna i omvärlden kräver utsikter om nödvändiga åtgärder som sträcker sig längre fram än en regeringsperiod. En betydande mängd aktörer inom hälsobranschen deltog i att utarbeta visionen under hösten 2022.

Visionen tar stöd av Finlands möjligheter att dra praktisk nytta av våra goda färdigheter för att utnyttja hälsodata och digitaliserad hälsovård. Enligt visionen har Finland år 2030 förnyat sin hälsovård som en internationell föregångare med hälsodata och digitaliseringen i spetsen.

Våra hälsotjänster är både individuella och kostnadseffektiva. Den förebyggande hälsovården har fått ett växande fotfäste i hälso- och sjukvårdsbudgeten i förhållande till sjukvården.

Förnyelsen av hälsovården har skapat ny kompetens inom branschen och ökat tillväxten för export, investeringar och antalet företag betydligt. Vår ställning som ledande aktörer i att genomföra och applicera EU:s initiativ om hälsodata har gynnat vår hälsovård och våra företag. Finland har blivit ett av de mest intressanta internationella centrumen för utveckling av hälsovården och vi är en attraktiv internationell samarbetspartner.

De åtgärder som behövs för att uppnå visionen betonar betydelsen av möjliggörande lagstiftning, incitament för forsknings-, utvecklings- och innovationsverksamhet samt samarbetet mellan offentliga och privata sektorn. Tillväxtstrategin för hälsobranschen fungerar som ett verktyg för att uppnå visionen.

A shared vision lays the foundation for health sector growth

Healthcare systems worldwide are undergoing a major transformation. The use of new technologies is increasing, providing access to services and treatments that were unimaginable ten years ago. At the same time, ageing populations in developed countries are beginning to put pressure on the cost of and demand for health services. The sustainability crisis in the funding of welfare states is already being felt, not least in Finland.

Technology offers huge opportunities to simultaneously develop healthcare and solve the sustainability crisis. However, its introduction requires investment that ageing societies seem to be unable to afford. On the other hand, technology without reforming practices rarely leads to actual results. The same also applies to reforming practices without exploring the potential offered by new technologies. Reforming social and health care is Finland's response to these pressures for change. A major issue for the future of healthcare is how we will harness the potential of new technologies and health data in this reform.

Finland is starting the reform process from a good position. Our healthcare is digitalised and we have been a pioneer in developing our capabilities to use health and social data. But our national debate is clouded by pessimism. When we discuss the issue, we tend to present a gloomy vision of a declining Finnish healthcare system, where services cost too much and where it is increasingly difficult for the sector to attract professionals to work.

The health sector vision 2030 lays the foundation for a positive future for healthcare. According to the vision, close inter-sectoral collaboration and justified investments in digital technologies and health data will help us make the most of the reform of our health services. We will be able to provide personalised and high-quality health services and do this within a sustainable economy. Reforming our healthcare will create new solutions, skills and competences for which there will be new export opportunities. They will also attract international health sector stakeholders to collaborate with us and invest in Finland. Resolving healthcare challenges and turning them into economic growth is an opportunity comparable to the ongoing green transition.

The health sector vision 2030 is a two-fold proposition. On the one hand, it defines the future we want for the Finnish health sector, based on identified competitive advantages. On the other, it proposes specific measures to reach this future. The health sector vision 2030 is not a new strategy, but it can serve as a starting point for a new national strategy.

The health sector vision 2030 is based on the Health Sector Growth Strategy for Research and Innovation Activities, prepared in 2014, under which a wide-ranging effort was launched to develop the sector's operating environment. The main objective of the Growth Strategy was to ensure that the investments made in the health sector over the decades could be used more effectively for economic and healthcare development.

The health and social services reform and the sustainability crisis create a new need to which the strategy can respond. This requires defining a new vision for the future. Through a shared vision, we can create a clear direction for the future of the health sector. This vision will enable us to reform healthcare in a way that supports economic growth.

Finland in 2030: well-being and growth through reforming healthcare

The health sector vision creates a bold picture of the future we want for the sector. Finland has an excellent starting point from which to achieve it. But this requires determined work to turn our focus from the problems towards opportunities.

The Finnish health sector vision 2030 in brief

It is 2030 and Finland has reformed its healthcare system as an international pioneer, using health data and digitalisation to drive the reform process. The principle effectiveness guides decisions in healthcare.

We have learnt how to use digitalisation and health data to treat diseases and for health promotion, so that Finns get more health benefits from health and social sector services. At the same time, services are now both personalised and cost effective. Decision-makers, both nationally and in the well-being services counties have jointly agreed on the long-term goal of devoting half of the healthcare budget to prevention.

Healthcare reform has generated new skills and competences in the health sector that have boosted exports and the number of companies active in the sector. Our leading role in implementing and practically applying EU health data initiatives has benefited our healthcare sector and our companies more than our competitors. Finland has become one of the most attractive international hubs for healthcare development, reflected in the rapid growth of investments in the country.

The key catalysts of this positive development are the close collaboration between the public and private sectors, enabling legislation and a determined use of funding for research, development and innovation.

Health sector growth and competitiveness vision for 2030

Finland will be a frontrunner in healthcare reform using health and social data

By 2030, Finland will have become recognised as an international pioneer in reforming healthcare through the use of digital technologies and health data. Over the preceding decade, we will have advanced from understanding the value of digitalisation and data to being a successful user of them. Health and social data has enabled the allocation of healthcare resources based on effectiveness.

This will result in a healthcare system that not only produces greater individual health benefits but is also cost-effective when focused on treatment that generates proven health benefits. Turning our attention to the importance of health as a factor creating value rather than a cost factor has contributed to this development. There is a broad consensus in our country that health and welfare impacts should be taken into account in all political decision-making.

Using health data in treatment and care

We will improve people's health and well-being by making effective use of the potential of new digital technologies and health data. Legislative reforms to promote the interoperability of information systems and the use of health data, will enable the unhindered flow of health and social data within the healthcare system, creating value for patients and healthcare professionals. Health and social data will provide the most comprehensive benefits through the seamless sharing of data collected by registers, the Kanta digital services for the social welfare and healthcare sector and individuals themselves. Healthcare decision-makers at national level, as well as individual healthcare professionals, will be able to make informed decisions based on the data.

Measured by key indicators, the treatment and care received by Finns will have improved and well-being will be considered to have increased. In international comparisons, Finnish healthcare will be rated among the top countries.

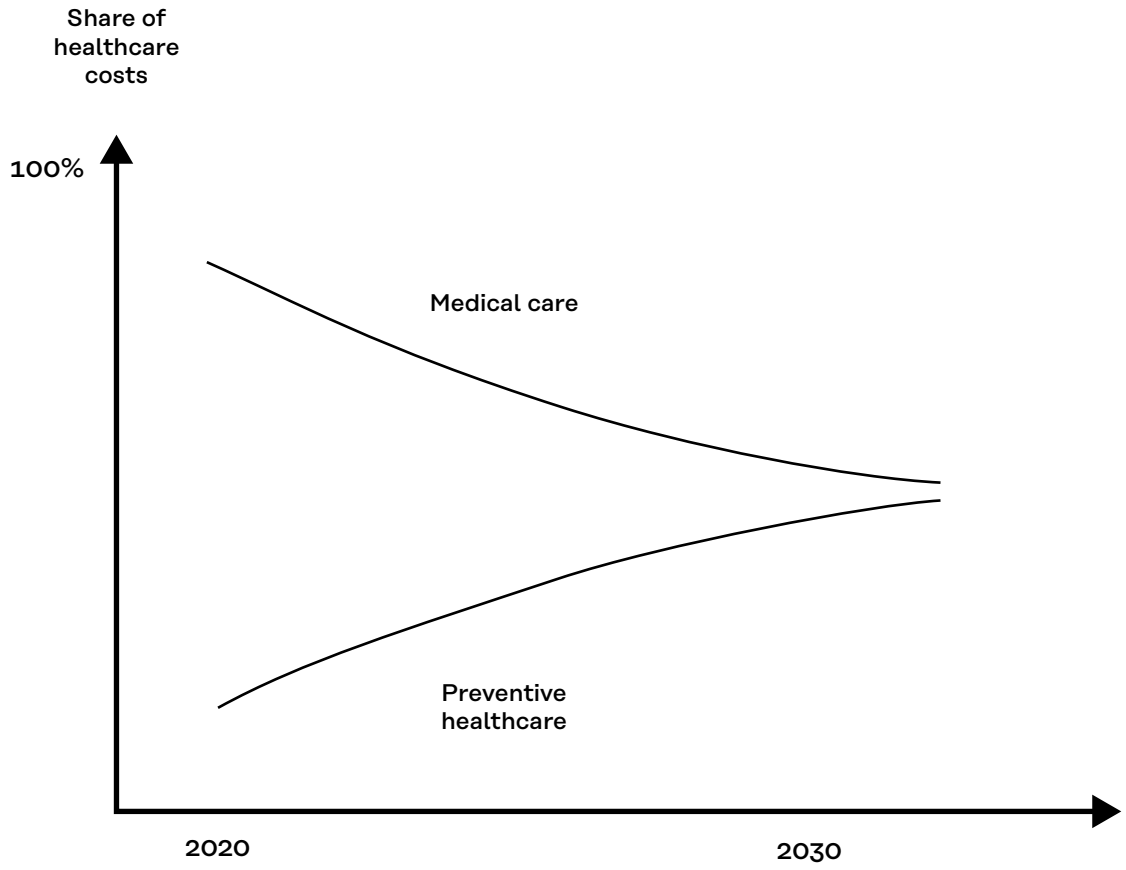
Reducing lifestyle diseases through preventive healthcare

The focus will have started to shift towards preventive healthcare instead of medical care. To reduce lifestyle-related illnesses, Finland will boldly decide to realise the so-called 50/50 vision, according to which half of the healthcare budget will be allocated to preventive healthcare and half on medical care.

Preventive services will aim to keep 80% of the population as healthy as possible, outside the need for healthcare, which will allow for the provision of additional support for the 20% who need it the most. This will promote equality and fairness and help healthcare to operate cost-effectively.

The use of health and social data will play a key role in developing preventive healthcare, making it possible to develop digital tools and services that support people in making lifestyle changes and maintaining their mental well-being. Significant progress will be made in preventing chronic diseases. The enabling factors will be AI and the ability to combine well-being data, such as data on nutrition, sleep or exercise, with healthcare data.

Figure 1. According to the 50/50 vision, the share of costs of preventive healthcare will increase.



Use of genome data in healthcare has become commonplace

Using genome data is common in Finnish healthcare. This makes it possible to treat diseases in a more personalised manner and has also helped to shift the focus of healthcare towards
prevention. Based on the national genome database, gene screening helps identify individuals who are, for example, genetically at a high risk of developing breast cancer. In pharmacotherapy, genome data is used to individually identify whether a particular medicine would be effective or ineffective.

Finland is a leading country in genome research. Our position is based on research expertise and the courage to launch large-scale international research projects, such as FinnGen. Practically all pharmaceutical companies operating globally participate in projects implemented in collaboration between the public and private sectors. As a result of such research projects, the genome data of one in two Finns has been stored in our biobanks to advance healthcare and medicine.

The healthcare reimbursement scheme encourages the development of new solutions

Finland has introduced a new kind of healthcare reimbursement scheme that includes digital therapies, proactive screenings, services related to early detection of illnesses and various tools. For example, digital therapy – a digital treatment method based on medical

evidence – can be nationally approved. After this, a healthcare professional can prescribe such therapy for treating an illness.

The reimbursement model will make it possible for everyone to receive the same services regardless of where they live, which will help keep Finns healthier and enhance their well-being. The healthcare system can avoid running duplicated competitive tendering processes, which will reduce costs. A unified market and clear ground rules will encourage health sector companies to develop new solutions for treating diseases.

Data and AI experts being trained in healthcare

Data and AI skills have increased among health sector stakeholders. Universities and higher education institutions have created study modules in health sciences that focus on data and AI.

The training of well-being analysts which has started at universities of applied sciences has created a new group of professionals in the healthcare and social welfare sector. Every well-being services county has professionals qualified as well-being analysts.

Close collaboration between private and public sector stakeholders

The health sector will have been reformed through strong collaboration between the public and private sectors. Public-private partnerships have enabled new scientifically studied technologies to be tested in the healthcare system.

The public sector has already introduced practices that facilitate collaboration through reformed public procurement legislation. With its support and contributions from public funding providers, co-creation platforms have been set up in each university hospital, and innovations created with their assistance have been introduced quickly in healthcare. This generates the necessary references for the Finnish companies that have been involved in developing them.

Data ecosystems generate growth and new business

Health sector stakeholders will have moved from traditional value chains towards fair data sharing ecosystems in the health sector, creating value for all parties involved – individuals, organisations and society. Previously, those involved mainly used their own organisation's internal data or, to complement their own data, external data sources and open data. By 2030, more and more actors will operate in data ecosystems, where ecosystem actors provide seamless information-based services for end customers together.

Data ecosystems are characterised by clear common services, rules, contracts and operating models. This will generate completely new business and growth opportunities for the health sector. Closer collaboration between the public and private sectors than before will also have helped solve some of society's biggest challenges, such as mental health.

Building services on ethical foundations

Every Finn will be confident that their social and health data is safe and their privacy is protected. Data security and access to data for treatment, preventive services and research and innovation will be implemented simultaneously.

Health sector actors will have constructed services and data-based products on an ethical basis. They will adhere to the six principles of the fair data economy: trust, access, human-centricity, value creation, competence and sharing. This will also boost the competitiveness of Finnish actors.

Finland's globally renowned innovation-friendly business environment

Finland will have become globally recognised as a testing ground for innovative companies, promoting development and experimentation opportunities. Our success will be rooted in our work on healthcare reform. In this context, we will have learned to test new innovations using health and social data with low thresholds.

The cornerstones of an innovation-friendly operating environment in the health sector have included enabling legislation, close public-private collaboration and public financial incentives for research, development and innovation activities. We actively market our operating environment and expertise to other countries reforming their healthcare systems and companies operating in them.

Strengthened research and innovation activities in the health sector

Finland will have directed part of the increase in government RDI funding to developing the health sector's operating environment. How the funding is allocated has been specified in collaboration with health sector stakeholders.

The focus has been on repairing the funding base for clinical research and research infrastructures in the field. To increase clinical trials, the scattered resources at university hospitals were brought together into a new national coordination unit. And to increase biobank research, hospital biobanks were merged into a national biobank. The use of health data has been enhanced by ensuring sufficient resources for the Finnish Social and Health Data Permit Authority Findata and by further developing other data access services, such as Fingenious of Finnish public biobanks. The development of research careers will have led to an increase in the number of research scientists.

Finnish companies will thrive in the EU's internal market for health data

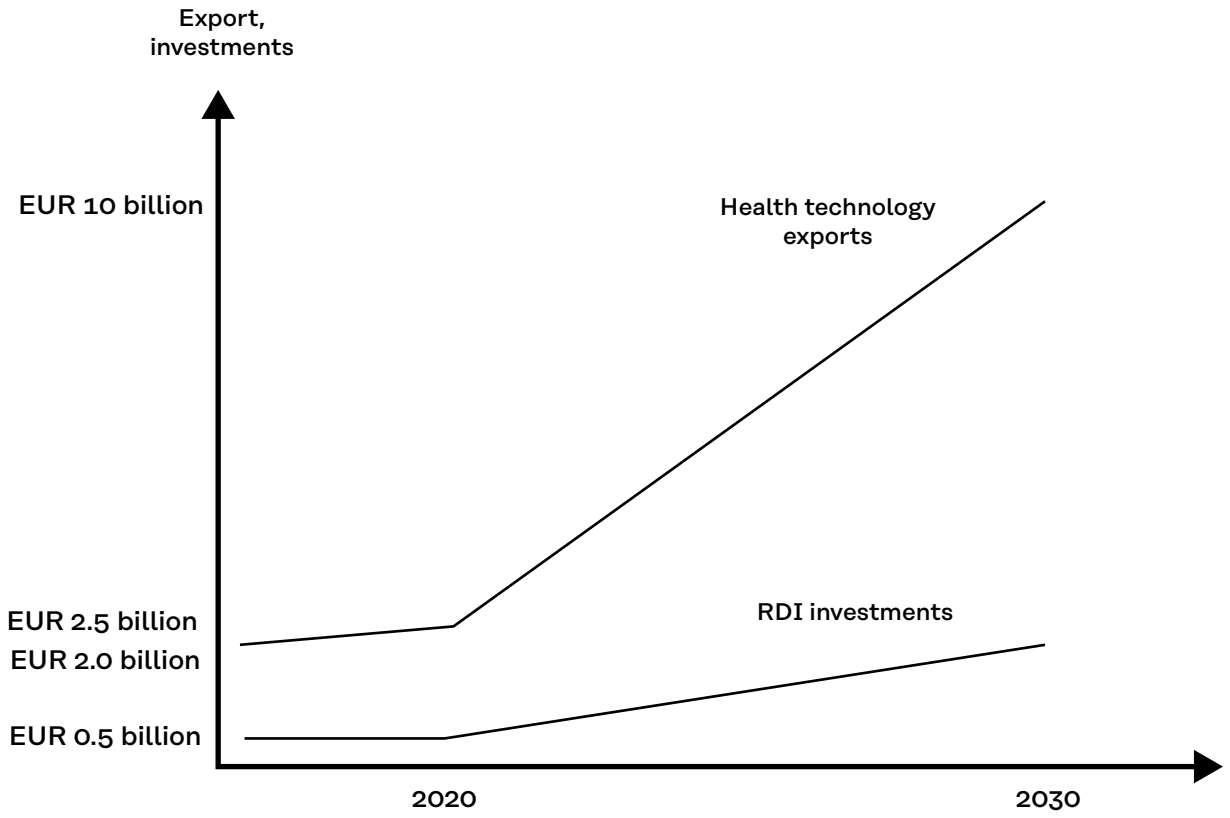
The active participation of Finns in the development of a single EU market for health data in the 2020s will have created special expertise and pioneering activity in Finland.

As a result, Finnish public and private sector stakeholders have become valued partners in the design and realisation of EU-wide and national health data projects. Finnish companies will have been among the first to expand their business to emerging markets, further increasing exports in the sector compared to competitor countries.

A flourishing health sector

The healthcare reform and targeted measures will have led to many positive economic outcomes. By 2030, several international health sector companies will have set up their RDI units in Finland. RDI investments in the health sector amount to EUR 2 billion and studies implemented using real-world data to EUR 100 million. Health technology exports will have reached EUR 10 billion, and the number of health sector start-ups will have tripled.

Figure 2. Opportunities for growth in health sector's RDI investments and exports.



Development work will be guided by the Health Sector Growth Strategy for Research and Innovation Activities

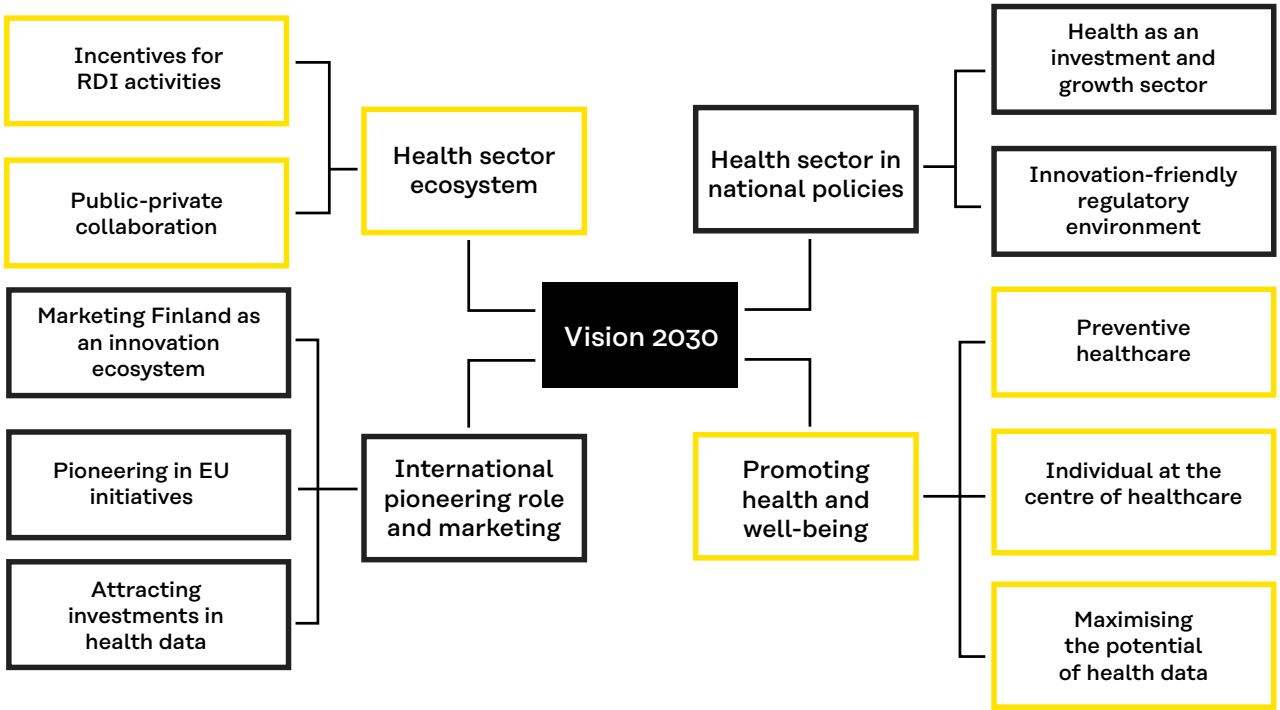
Health sector reform work based on new digital technologies and health data will have been implemented through the Health Sector Growth Strategy for Research and Innovation Activities in close collaboration with all health sector stakeholders. The strategy will have been conducted using a revamped steering model, making Finland globally recognised for its agility in reforming its healthcare system.

Ten measures to achieve the vision

The political debate in Finland has been dominated by a focus on the ever-increasing health costs, while attitudes to health as an investment has been left on the sidelines. Achieving the health sector vision 2030 requires a change of attitude: health must be seen as an investment in securing people's well-being and economic development.

Achieving the vision will require determined development in specific health sector areas and well-targeted supportive investment by society. The preparation of the vision has created the basis for the work on the health sector growth strategy by identifying the following areas of action that will pave the way for attaining a positive future vision. More specific measures and resources need to be identified in the context of the reform strategy itself.

Figure 3. The health sector vision requires a wide range of actions.



The health sector in national policy

1. Prioritising the importance of value-creation in the health sector rather than seeing it as a burden

The health sector is one of the fastest growing markets in the world. Digitalisation, new technologies, health data and population ageing are driving its growth. Many countries with more developed healthcare are seeking to benefit from the growth and development of the sector, not only by modernising healthcare, but also in terms of economy. This has required a shift of focus away from healthcare as a burden towards the economic opportunities of the sector.

Following the completion of the Health Sector Growth Strategy for Research and Innovation Activities in 2014, Finland began to highlight the growth potential of the health sector. However, as the health and social services reform has taken shape with the launch of the well-being services counties, the debate on healthcare has turned towards the burden it poses instead of the opportunities it presents.

Therefore, to respond to this changing environment, we need a renewed Health Sector Growth Strategy that aims at seizing the growth opportunities in the health sector. We should create a new steering model for the implementation of the strategy that will improve the management of the strategy and bring together not only the central government but also stakeholders, including the well-being services counties and companies, that will play a key role in its successful implementation.

We should resource the implementation of the strategy in line with the identified priorities. Under the Growth Strategy, we should ensure funding for initiatives previously undertaken, such as Findata and other national centres of excellence.

2. Creating a regulatory environment that boosts innovation, with the guiding idea of acting as an enabler of development

Finland has been a pioneer in defining the legal basis for the use of health data in particular, but practices are not yet fully operational. We need to continuously evaluate legislation concerning research and innovation activities in the health sector in terms of their enabling role in order to avoid rigidity, overly strict interpretation, variability in implementation at the local level and differences with international practices.

Using legislation that enables the use of health and social data we need to give Finland a competitive advantage in research and innovation activities for developing healthcare. We should establish new national approaches to support this objective, the primary purpose of which is to enable the use of health data. We should assess the potential for incorporating different research legislation concerning the health sector into a single act on research. We should create a new national model to harmonise the interpretation of research legislation in the sector.

Health sector ecosystem

3. Strengthening incentives for research, development and innovation (RDI)

The health sector ecosystem combines a wide variety of stakeholders: universities, start-ups, healthcare system operators, including hospitals and well-being services counties, and private and public actors. A well-functioning ecosystem means that the system's capacity to renew itself strengthens and is better equipped to respond to complex challenges. Healthcare in Finland is largely based on the capacity of the public sector, which is why the resourcing of public sector actors is particularly important for the sector's ecosystem.

We should strengthen the health sector ecosystem by increasing incentives for health research and innovation as part of the state's multiannual RDI funding programme. As part of this, we should ensure the funding base for research infrastructures for clinical research and the use of health data, such as biobanks. We should develop incentives for choosing a career in research. RDI funding should be allocated to the sector based on the choices made in the implementation of the Health Sector Growth Strategy.

4. Increasing partnerships and collaboration between well-being services counties and the private sector

It is essential for the development of the health sector that public-private sector collaboration functions properly. Through collaboration, the stakeholders strengthen and complement each other's expertise and resources. New collaborative models have been developed, but not as extensively as the Health Sector Growth Strategy considered necessary. It is appropriate to introduce new models now while the well-being services counties are being established.

We should establish broader collaboration platforms, for example in the context of hospital environments, to develop and deploy health technology innovations and create references for start-ups. We should reform legislation on innovative public procurement and related practices to facilitate and expand public-private collaboration.

Promoting health and well-being

5. Prioritising health promotion and disease prevention in well-being services counties

Health and social data provide an important opportunity to develop preventive healthcare. By using data and combining different data sources, we can develop apps, devices and services to support lifestyle disease prevention.

To develop preventive healthcare, the well-being services counties will combine the health and well-being data recorded by citizens themselves with public health data. This will help underpin disease prevention services and incentive models and health promotion campaigns. The guiding principle is the 80/20 approach, whereby 80% of population is considered healthy, so that treatment and care can be offered to the 20% most in need.

To achieve this, we should continue developing digital tools and services to support people in making lifestyle changes, combining register and system information data with data collected by individuals themselves. We should increase the data and AI skills of health sector stakeholders and increase curricula focused on data skills in health sciences.

6. Enabling individuals to take an active role and building services in a human-centred manner

The development of services need to be based on people's genuine needs and life situations. A human-centred approach also requires respect for the rights of individuals.

We should enable individuals to play an active role in the use of the health information that concerns them. We should develop health data ecosystems around people's life events, with fairness rules. We should ensure that people's social and health data is secure and their privacy is protected. The health outcomes reported by patients in connection with their treatment should be linked with other health data to provide a more holistic picture of an individual's health in healthcare.

7. Harnessing the full potential of health data

Health data and its use, together with digital technologies, have a key role in successfully reforming healthcare. Finland is well placed to do this, both in healthcare and in the research

and innovation that underpins its development. However, measures are needed to maximise the full potential of data.

We should utilise health and social data for healthcare innovation, for example in combination with existing digital technologies, new data analysis methods, such as AI and machine learning, or new biotechnologies. We should do this by ensuring that legislation enables data to be shared in a transparent way, based on consent or legislation, and by making it possible to combine health and social data between different data sources.

We should be proactive in adapting the changes in international regulation to the national legislation and recognise the possibilities of harmonised international standards to avoid the creation of local data silos.

We should build new, more flexible solutions for healthcare and social welfare to enable the use of health and social data and to deliver client-oriented services. We should support the expansion of the supplier- and technology-independent openEHR data model, which enables the interoperability between apps from different system suppliers. This would bring agility to system development, open interfaces and data sharing. OpenEHR would also allow actors to manage client pathways across organisational boundaries.

Using OMOP harmonisation, developed for research purposes, will enable a secure, disaggregated analysis of Finnish health and social data without the need to combine patient-specific data. This overcome delays and bottlenecks related to data protection and legislation.

We should channel public funding to promote the use of health data in research and innovation. When allocating funding, we should take account of the development of the EU Health Data Space so that Finnish companies and researchers would have the opportunity to benefit from it as frontrunners.

We should integrate research results on the use of health data into healthcare development. For example, the FinnGen research project has provided Finland with carefully analysed genome and health data from biobank samples from half a million Finns. This enables national and international research. The data repository could also be used to establish a national genome reference database, which would provide an opportunity to use genetic data in treatment and preventive healthcare.

International pioneering and marketing

8. Marketing Finland as a driver of health sector innovation

Finland is in an excellent position to capitalise in the ongoing digital transformation of healthcare in terms of exports, foreign direct investment and international collaboration in developing healthcare. However, this requires the marketing of our expertise, just as some of our competitor countries have been doing for years.

We should identify and exploit the areas of expertise where Finland is a pioneer, such as genetic research and predictive biomarkers, or where Finland has strengths, such as the use of personal data (My data) and AI. We should increase Finland's visibility and attract foreign interest through effective advocacy, international marketing and communications. Such measures should be based on collaboration between stakeholders, a communications strategy, resources, skills and capacities.

We should validate domestic apps, devices and services in the wider market to increase their credibility from the perspective of capital investors.

9. Maintaining Finland's leading international position in health data initiatives

In recent years, by making determined efforts, Finland has established itself in a leading

international position in the use of health and social data. This has been made possible by the Act on Secondary Use of Health and Social Data and the new Social and Health Data Permit Authority Findata.

International advocacy has been expanded through the legislative project related to the European Health Data Space and the Finnish-led collaborative project Towards European Health Data Space. Thanks to this advocacy work, the EU model for the use of health data is similar to the Finnish model.

To maintain our leading position, we should define the next Finnish goals and actions extending to 2030 concerning the opening of the EU's health data market and the advances in the digitalisation of healthcare. We should ensure that Finland maintains its leading position in EU initiatives even though individual projects may only have a fixed term. We need to establish a national network operator for digital healthcare to enhance Finnish participation in international health-care collaboration.

10. Attracting international investments in the use of health data to Finland

Finland can use its expertise in digital solutions and rich health data repositories to attract international investment.

Access to health data through Findata, biobanks and other data sources is a major value proposition for companies and researchers, making Finland a particularly attractive target for international investment.

Findata is one of the most innovative international initiatives in health data brokerage services, which has made Finland one of the leading European countries in the field of the secondary use of health data. Using AI to combine and analyse data to manage diseases, on the other hand, offers huge opportunities for the private sector and research.

To increase international investment, we should ensure that Findata, biobanks and other data sources will be resourced to further develop their capabilities and strengthen the value proposition of the using of health data by removing any identified obstacles. We should ensure the long-term availability of significant health data-based research materials by further developing our legislation.

We should establish a national clinical trials coordination unit to strengthen collaboration and capabilities, especially among university hospitals, in conducting clinical trials and international marketing. Increasing the number of clinical trials would lead to a significant increase in investment in Finland and promote faster adoption of the latest treatments.

The health and well-being of Simo and his loved ones in 2030

What will Simo's experience of healthcare and health maintenance be in 2030? How will he interact with the healthcare system in 2030? How will new technologies and health data be used in healthcare and will this be reflected in Simo's daily life by improved health services? And will reforms in health services be translated in economic terms, in the form of increased exports by the sector and research collaboration and investment in Finland?

The following stories of Simo and his loved ones describe how healthcare could develop if we adopted the vision 2030, reformed the health sector's growth strategy in line with the vision and effectively implemented the strategy.

Simo, 28, has type 1 diabetes, lives in Rovaniemi, Finland

Simo has had type 1 diabetes since his childhood and has always had to closely monitor his own blood sugar levels.

At the age of 25, Simo was invited to participate in a long-term clinical trial that was being conducted simultaneously in Finland, the UK and France, leading countries in diabetes treatment. Finland's participation in the trial was also determined by the rapid start-up process employed by the ClinCe unit, the present co-ordinator of clinical trials in Finland.

In the trial, Simo was fitted with an artificial pancreas that could be programmed based on data on Simo collected from several of his health data sources. The device became part of Simo's treatment, allowing him and his healthcare professionals to manage the disease in a much more precise way than before by automatically regulating insulin levels based on Simo's aggregated health data.

Drivers:

- Finland as an attractive partner for carrying out clinical trials.
- Good access to the latest medicines and health devices in Finland.
- Close collaboration between well-being services counties and stakeholders in the pharmaceutical and health technology industries.
- Comprehensive treatment based on data.

Needed urgently:

- Easy access to health data for Finnish and international actors.
- The possibility to combine health data from different sources.
- A clinical trials coordination unit.
- Marketing Finnish expertise.

Simo has visited Spain every now and then to see his friends living there. Previously, he was cautious about travelling because he was afraid that his diabetes would be a problem: If he were to be hospitalised in Spain, the nursing staff would not have data on his condition. Or if he were to leave his medication behind in Finland, he would not get the right replacement at a local pharmacy in Spain.

In 2025, EU legislation on the use of health data took effect. National systems were brought into line with it over the next few years. Should Simo need a check up or treatment during his trip, the Spanish health professionals would be able to directly access Simo's electronic patient record through the Kanta system in Finland. He could also use his European insurance app and show his prescriptions at a pharmacy in Spain to get the prescription medication he needs. In 2030, Simo's illness no longer restricts him from traveling within the EU.

Drivers:

- Seamless exchange and use of health data in all EU countries.
- Good digital skills of citizens.

Needed urgently:

- Interoperable patient information systems.
- Decision on a practical model for the use of health data in the EU.

Simo balances between his family, a demanding work and active social life. He would like a better balance in his daily life because he often feels tired, stressed and exhausted. He has come across a new Finnish app called 'Energy' that helps him make small but significant changes in his everyday life to help him cope and feel better. Simo has given the app permission to combine and analyse his health and well-being data. It combines Simo's data on his treatment for diabetes with his exercise, sleep and shopping data. The app also uses Simo's calendar data to identify how Simo spends his time.

The Energy app helps Simo to see irregularities in his own behaviour that he had not noticed before. He found out that he was sleeping much less than he had reckoned, that his stress levels were constantly high and that his eating habits were sporadic and his diet did not contain enough vegetable fats. The app suggested how Simo could make space in his calendar for things that he felt were important to boost his well-being. With the personalised recommendations, Simo gradually started feeling better, more focused and well. Small changes to his daily routine had a big impact on his overall well-being.

Drivers:

- Individual health.
- Utilisation of personal data (My data) and AI.
- Combining health and well-being data into digital services and applications.
- Preventive healthcare.

Needed urgently:

- Open interfaces of patient information systems and the capacity to combine data from different sources.
- Public RDI and risk funding for health sector SMEs.
- Understanding how new business models based on data sharing work.

Maria, Simo's wife, 33, has breast cancer, lives in Rovaniemi, Finland

Maria and Simo have long been aware of how important it is to share their own health data for advancing healthcare and medicine. This awareness has been helped by active communication on the importance of using health data for healthcare and the research. Maria and Simo have therefore agreed to share and combine their data in every situation where it has been requested. Both have also given blood samples for use in biobanking research.

National genetic screening has become available to well-being services counties, allowing the comparison of the genetic data of consenting citizens with an extensive national genome database. This contributes to promoting the early detection and diagnosis of diseases. Screening can also provide people with new information about their predisposition to develop diseases, which may guide them in making lifestyle choices that promote good health. Maria and Simo decide to participate in the screening.

The genetic screening reveals something surprising: Maria is at high risk of developing breast cancer. Due to Maria's congenital predisposition, she is immediately admitted to annual breast cancer screenings.

Two years later, the annual screening reveals that Maria has a potentially malignant tumour. The screening results are analysed using AI, which enhances the accuracy of image interpretation year by year and has already clearly exceeded what medical professionals were at best able to do. A biopsy is taken of the tumour and analysis reveals that the tumour is dependent on a single growth factor mutation. Maria is told that, unfortunately, pharmacotherapies developed for this type of mutation have not yet been approved for patient use in Finland. Maria is understandably very worried about her situation.

However, soon afterwards, the Cancer Clinic of Oulu University Hospital contacts Maria and asks her to participate as a patient in a study led by Helsinki University Hospital to test targeted drug therapies to determine their individual efficacy.

The innovative and internationally groundbreaking research design aims to benefit all those involved in the research – patients, healthcare professionals, scientists and pharmaceutical companies, as well as authorities in charge of healthcare funding. The pharmaceutical companies involved bring their medicines in the study for free to be tested and, in return, receive data on their efficacy in clinical use. And if the medicines are found to be truly effective in the trial, the hospital has agreed to pay the normal price for them after a certain period of use. The study has been expanded to cover the whole country through the activities of the National Cancer Center Finland (FICAN), the network of university hospital cancer clinics in Finland.

Maria is initially hesitant about taking part in the drug trial, as she works as a freelancer in Rovaniemi and is concerned about the time needed for treatments and the uncertainty of the results. But she is relieved to hear that the study will be carried out as a decentralised clinical trial. Within the framework of the study, Maria stores and sends all necessary data on her mobile phone and makes clinic visits where she lives without losing much time off work for travelling.

A national team of various experts proposes an experimental drug therapy that fits the molecular profile of Maria's tumour and is available for use within the framework of the drug trial. This is made possible through a partnership model agreed between the authorities responsible for regulating pharmaceuticals, university hospitals and pharmaceutical companies. Maria does not need to pay for the pharmacotherapy because it is administered as part of the trial. The medicine works and Maria is hopeful that she will recover. She is also happy for other Finnish cancer patients because she hears that the authorities have decided to base the new national outcome-based cancer treatment model on the practices used in the study.

Drivers:

- Confidence in science.
- Personalised medicine and preventive healthcare.
- Development of patient pathways.
- Use of genome and lifestyle data and AI in healthcare.
- Public-private stakeholder partnerships.

Needed urgently:

- Communication about the benefits of sharing health information.
- Development of screening methods.
- Financing of clinical research.
- Decentralised implementation of clinical trials.
- Reference database of national genome data.
- Outcome-based drug reimbursement schemes.

Helena, Simo's grandmother, 85, lives at home assisted by new kinds of services, lives in Oulu, Finland

Helena, Simo's grandmother, has had type 1 diabetes all her life. Helena still lives at home, but the disease, together with her high blood pressure and chronic arthritis, has weakened her motor functions. Her family has started to worry about her risk of falls. They decide to contact the well-being services county professionals for help. They learn that there are technological solutions available that can help Helena continue to live safely in her own home.

The well-being services county works in close co-operation with a private health service company. The company has developed a technological app designed to improve the home living options of older citizens. The solution is based on combining sensor technology installed at home, behavioural information and AI. It learns to recognise Helena's movement patterns in her home, warns her, her family and nursing staff of any abnormal situations and alerts the emergency medical care to the scene if necessary. The app also provides Helena with personal exercise and rehabilitation instructions based on her current state of health and physical condition.

The health service company's solution has been developed using the HospInno health technology co-creation platform established under the auspices of Oulu University Hospital. It combines the needs of the local healthcare system with new solutions provided by companies and tests how the solutions function in practice. The new procedures employed in public procurement enable rapid testing and deployment of solutions. The HospInno platform has allowed many international health technology start-ups to gain references from successful implementation of their solutions.

The solution developed and tested using HospInno has been introduced in the well-being services county's home care and home nursing services. The national impact assessment unit for healthcare technologies has found that the solution saves healthcare costs, and, based on the data analysed from the outcomes reported by patients, it has had a positive effect on older people's sense of safety and general well-being.

Drivers:

- Technology-assisted dignified ageing.
- Health cycle thinking, which is the number of years a person spends in good condition and maintaining their functional capacity instead of life cycle-based thinking.
- 80/20 thinking in the allocation of the healthcare budget.
- Public-private partnerships.
- Developing AI to support decision-making in healthcare.
- Health technology innovations.

Needed urgently:

- Measures of Finland's national programme on ageing to support the adoption of technologies and to develop housing solutions.
- Co-creation platforms for healthcare.
- Developing innovative public procurement practices.
- Promoting value-based healthcare.

The mental health of Marjatta, Simo's cousin, 22, is cause for concern, lives in Turku, Finland

Marjatta is studying to become a nurse at the University of Turku. Lately, after having moved away from her family and friends in Helsinki, she has been feeling down. Marjatta has difficulties dealing with her feelings, so she has decided to book an appointment with a mental health professional.

At the first appointment with the doctor, Marjatta describes her symptoms. According to the doctor's assessment, her problems do not seem severe. The doctor gives Marjatta a prescription to use the digital 'MentApp'. According to the doctor, the app, which was developed in Finland, is intended for low-threshold treatment to support mental health.

When Marjatta asks the doctor about the costs of using MentApp, she learns that it is part of the service selection of the Finnish healthcare system and that it is currently a fully reimbursed treatment method. According to the doctor, several similar innovations to support mental well-being have been deployed in recent years. The development of the app was based on the basic research project funded by the Academy of Finland and launched under the Neurocenter Finland, which coordinates activities in the field in Finland, and it has also gradually generated research-driven start-ups seeking internationalisation.

Even though Marjatta is usually enthusiastic about new technologies, she is a little unsure about sharing her own feelings with a "robot". But when she reads MentApp's instructions, she notices that she can make video calls to the app, just as she would to a real person, so she is starting to feel easier about using it. MentApp asks for Marjatta's consent to combine data from her other smart devices, such as a smartwatch, and to incorporate it into her health and social data in the Finnish Kanta health database.

By analysing Marjatta's health data, MentApp recognises that the quality of her sleep has been poor for the past two weeks and that she has reduced her level of physical activity. The app asks Marjatta questions about her general well-being and invites her to a video call. During the conversation, Marjatta discovers that the way she feels is explained by several simultaneously affecting factors that she has had trouble identifying herself. MentApp gives instructions on a few techniques that Marjatta to help her cope with her feelings. Marjatta agrees to use the app regularly for the next two months and to tell it how she feels.

At the end of the last video call, MentApp asks Marjatta if she wants to share the conversations with mental health professionals or keep them private. Marjatta decides to allow the professionals to see the data so that the doctor treating her can use it at their next appointment. At the appointment, Marjatta says that using MentApp has helped her move forward. Marjatta feels that her future is brighter.

Drivers:

- Use of health and social data.
- Public-private sector stakeholder collaboration.
- Digital literacy and health literacy.
- Preventive healthcare.
- Use of technology and AI in healthcare.

Needed urgently:

- Funding for expertise hubs in the health sector.
- Developing technology transfer models at universities.
- Public RDI funding for small health sector companies.
- Reimbursement models for digital treatment.
- Inclusion of digital literacy and health literacy in curricula.

Glossary

Data ecosystem

Multiple data networks can form a data ecosystem, "a network of networks", in which the members collaborate to share and use data and boost innovation and new businesses.

Data space

A set of mutually agreed principles and rules for sharing and exchanging data within or between different sectors. Data spaces that promote the sharing and use of data are being developed in sectors such as transport, health, energy and agriculture. They are also intended for building interoperability between different sectors.

Digital therapy

Digital evidence-based treatment for illnesses and syndromes. It is offered directly to patients to support their treatment and rehabilitation. Digital therapies can be used as an independent treatment for conditions such as depression or combined with medication, for instance in the treatment of cancer.

Fair data economy

The sector of the economy that focuses on creating services and data-based products in an ethical manner. Fairness means that the rights of individuals are protected and the needs of all stakeholders are taken into account in a data economy.

Health literacy

A person's ability to find, understand, use and evaluate health-related data. Health literacy describes such things as how easy or difficult it is for a person to use health-related data from different sources to look after their own health and find the right health services, or to understand instructions given by healthcare professionals.

OMOP Common Data Model

OMOP (Observational Medical Outcomes Partnership) is a data model developed for research purposes, where the data is expressed using a common vocabulary based on international code lists and the relationships between datasets are expressed in a consistent way.

OpenEHR

OpenEHR describes how data is stored in the information system and makes it possible to replace the patient information system by another one.

Patient-reported health outcomes

Symptoms reported by patients and health-related quality of life data (in English: Patient Reported Outcomes, PRO). For example, in clinical trials, patient-reported data is increasingly used to develop more personalised treatments.

Secondary use of health and social data

A case when the customer and register data created during health and social service sector activities will be used for purposes other than the primary reason for which they were originally saved. The secondary uses referred to in the Finnish Act on the Secondary Use of Health and Social Data include: scientific research, statistics, development and innovation, steering and supervision of authorities, planning and reporting duties by authorities, teaching, knowledge management.

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Appendix 1: Joint vision process of health sector stakeholders

In spring 2022, Sitra published a working paper on the next steps in the implementation of the Health Sector Growth Strategy. The work on this involved a large number of health sector stakeholders. The short-term strategic outlook and the lack of a common vision for the future were identified as the main near-term challenges.

Sitra set out to address the observed shortcomings and, during the autumn, developed, together with health sector stakeholders, a vision for the growth and competitiveness of the Finnish health sector up to 2030. The aim was to clarify a common vision of what we want in terms of the growth and competitiveness of the health sector by 2030.

The vision was prepared in collaboration with health sector operators using interviews, two open workshops with the same content and two invitational workshops. The vision was created through an open and participatory collaboration process.

The vision work, commissioned by Sitra, was facilitated by the Copenhagen Institute for Futures Studies (CIFS). CIFS is a think-tank with special expertise in strategic foresight. In recent years, CIFS has been involved in carrying out a number of international projects on the future of the health sector.

CIFS interviewed 18 experts from selected stakeholder groups. Sitra assisted with selecting the Finnish stakeholders. The process involved many different stakeholders, including representatives of life sciences, researchers and public healthcare providers. The two online workshops with the same content, arranged later, were attended by 80 healthcare specialists. The online workshops focused on the strengths, opportunities and shortcomings of the Finnish health sector. Finally, two workshops were organised, attended by 40 specialists and drawing on the data gathered during the process. The work facilitated by CIFS was carried out on a tight schedule in November-December 2022.

Based on the interviews and information obtained from the workshops, CIFS wrote the first draft of the vision, after which Sitra's working group continued to clarify the vision and to put it in the Finnish context.

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SITRA.FI
Itämerenkatu 11–13
PO Box 160
FI-00181 Helsinki, Finland
Tel: +358 294 618 991
@SitraFund