



Healthcare Readiness Index 2022 handout

GLOBSEC 2023 Bratislava FORUM



DISCLAIMER

The outcomes and findings of this Healthcare Readiness Index 2022 EU Update (hereafter: "Report") is issued by GLOBSEC and is based on methodology integrating the latest statistics from international organizations and index specific methodology was applied. The Report presents information, data and views that were compiled and/or collected by GLOBSEC Health Fellows, Mr. Martin Smatana, Mr. Michal Štofko. The founding partner and supporter of the Report is GLOBSEC Corporate Member, company MSD (Merck Sharp & Dohme).

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In 2022, GLOBSEC prepared the Health Readiness Index 2021 to provide, based on a single composite index, an overview of the readiness of Central and Eastern Europe’s (CEE) healthcare systems to adapt and respond to future challenges.

The index was expanded in 2023 to cover all European Union (EU) countries to compare individual approaches of less and more developed countries and their systems, as well as to provide answers to the elementary question of system preparedness and resilience. The resulting index is labelled Health Readiness Index (HRI) 2022.

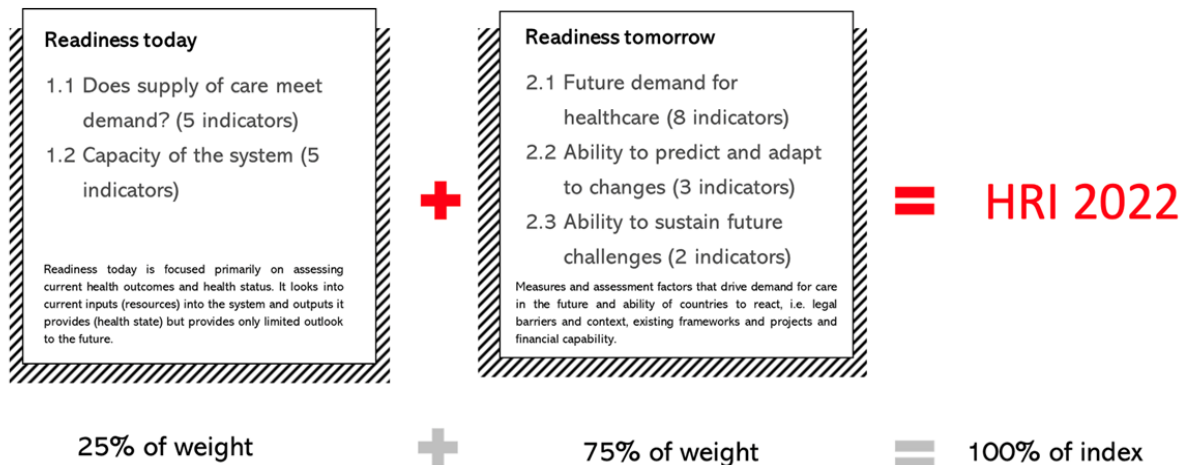
Overview of methodology

To assess the readiness of any respective country to confront healthcare challenges, such as the covid pandemic, increasingly ageing populations, or the rising incidence of multimorbid patients, a variety of factors must be considered. To gain a complete picture, it is vital to consider perspectives that heed both the past and present. The Healthcare Readiness Index, therefore, analyses indicators in two groups: (1) those that have defined readiness up to the present and (2) factors that are likely to influence the future readiness of the system.

1. Readiness today is focused primarily on assessing current health outcomes and the status of healthcare. It analyses current inputs (resources) into the system and outputs (the health state) but provides only a limited prospective outlook.

2. Readiness tomorrow measures factors that drive demand for future care and assesses the ability of countries to react. The future demand for health care services is a function of various factors, e.g., the incidence of diseases, risk factors, and preventive measures, among numerous others.

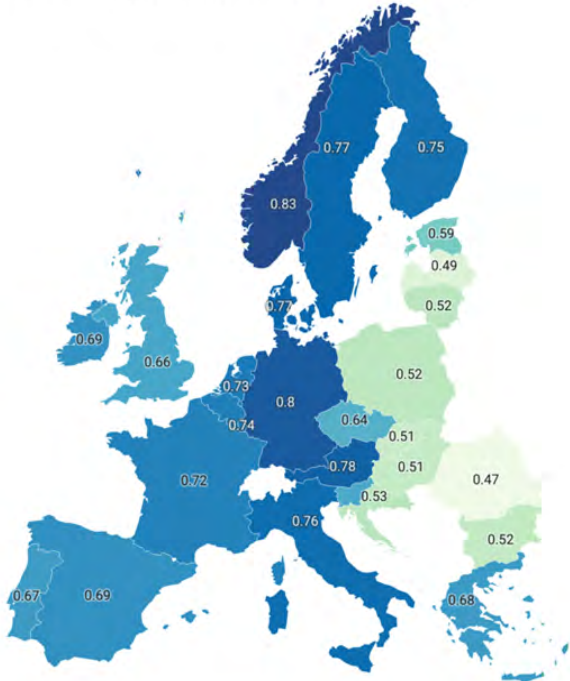
Each group consists of several indicators used to index countries from best to worst. The top scorer receives a value of 100, and other countries are assigned a relative score. Each indicator in a group receives the same weight. The overall HRI score, however, is weighted – readiness today indicators are assigned a weight of 25% and the readiness tomorrow indicators a weight of 75%.



Together, these two groups of indicators provide a complex picture of the readiness of countries to face future challenges (as visually depicted in the figure below) and a single composite index

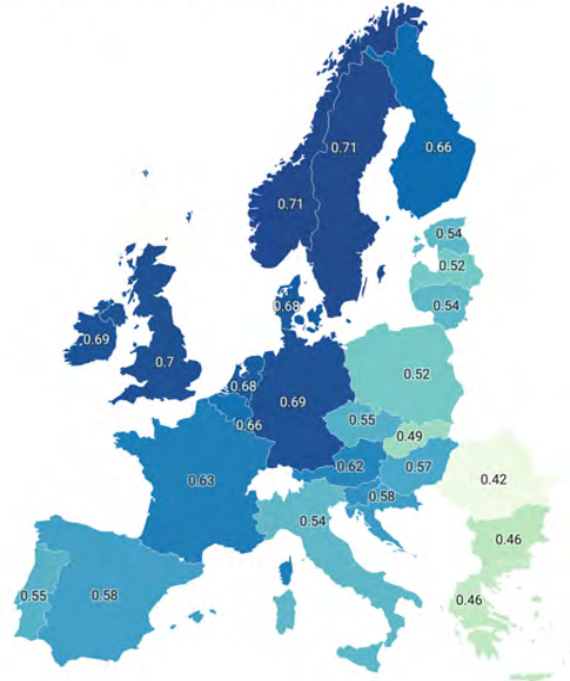
ranking all EU countries. Therefore, the healthcare readiness index is divided into two parts: readiness today and readiness tomorrow.

Health Readiness Index 2022 - Readiness Today



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Health Readiness Index 2022 - Readiness Tomorrow



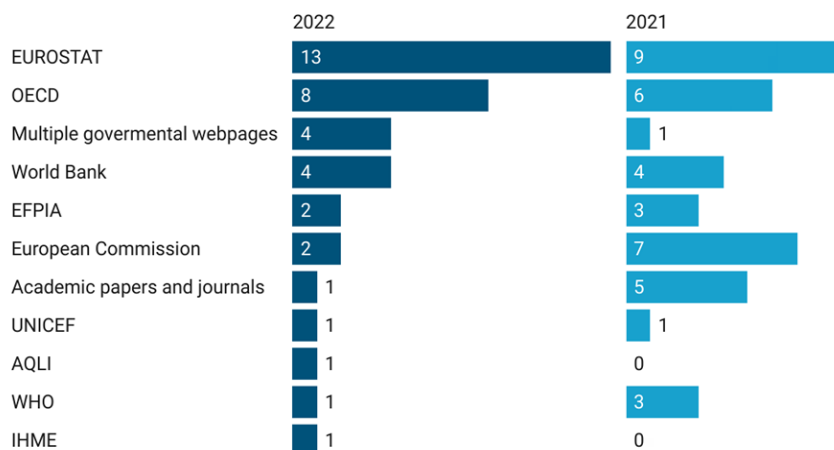
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Methodological adjustments

We extended the data to the whole EU and found that the reporting methodologies are more robust using Eurostat data. At the same time, they had a wider range of available sources applicable to HRI

2022 with similar standardisation and collection methodology. Therefore, the HRI 2022 is, to a greater extent, based on Eurostat data compared to the 2021 version of the index.

Comparison of used data



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Adjustment of weights

Due to the significant effects of the sample increase, the weights had a different impact than with a smaller sample, which resulted in the creation of data clusters that distorted the proportions of individual indicators (e.g., unmet

needs, where we had many countries in the range of 99.9-99.0% of the population and then several countries in the 99.0-95% range). The sample changed, and the weights had to be adjusted to compensate for these updates.

Results of the Healthcare Readiness Index

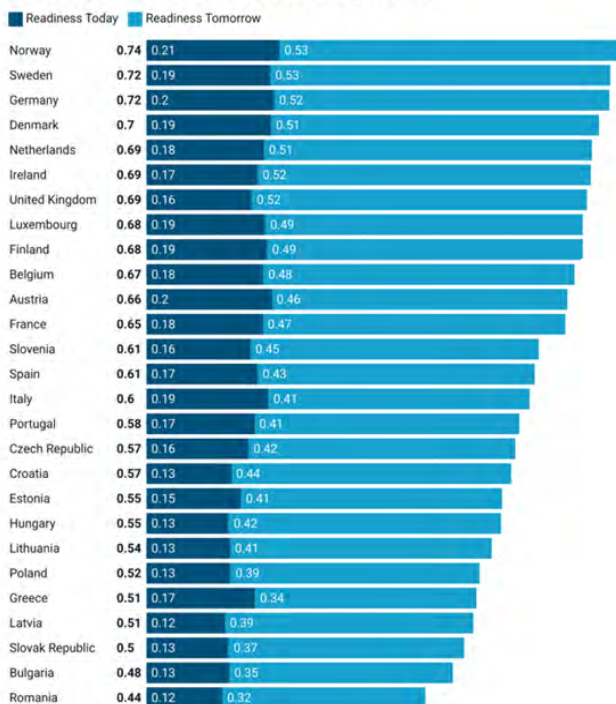
The HRI is expressed as a rating ranging from 0 to 100. This final value comprises the readiness today and tomorrow indicators' scores. For this reason, the results here are presented firstly in terms of the outcomes of each group of indicators and secondly as the final composite readiness index score.

Unsurprisingly, countries leading the index are primarily from Western Europe and Scandinavia, with Norway ranking the highest.

Primary reasons that drive these results include great access to innovative technologies (considering the long-term impact of expenses), a

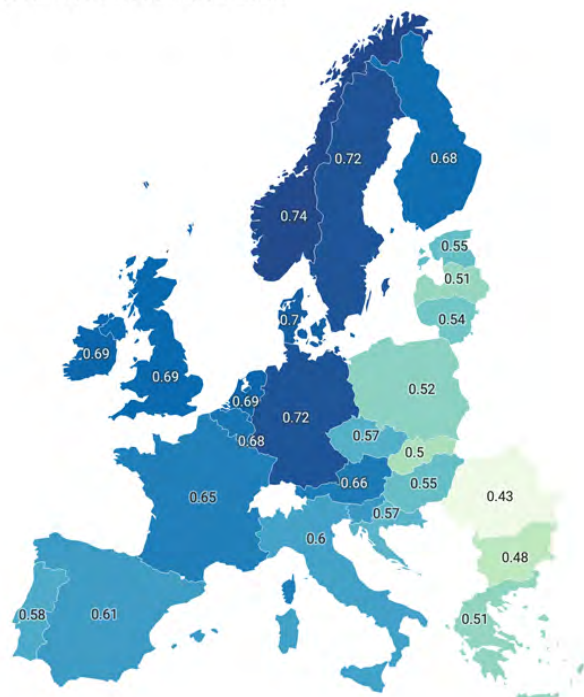
stable and relatively generous financing system and an effective network of healthcare providers, sufficiently ensuring the population's needs. The emphasis on determinants of health, such as smoking cessation and alcohol consumption, also had a significant impact. The countries ranked at the bottom half of the index are characterised above all by weak policy continuity, frequent personal changes within the government, absent participation of insurees in the payment mechanisms and proportionally lower spending on preventive health care.

Health Readiness Index 2022 composition



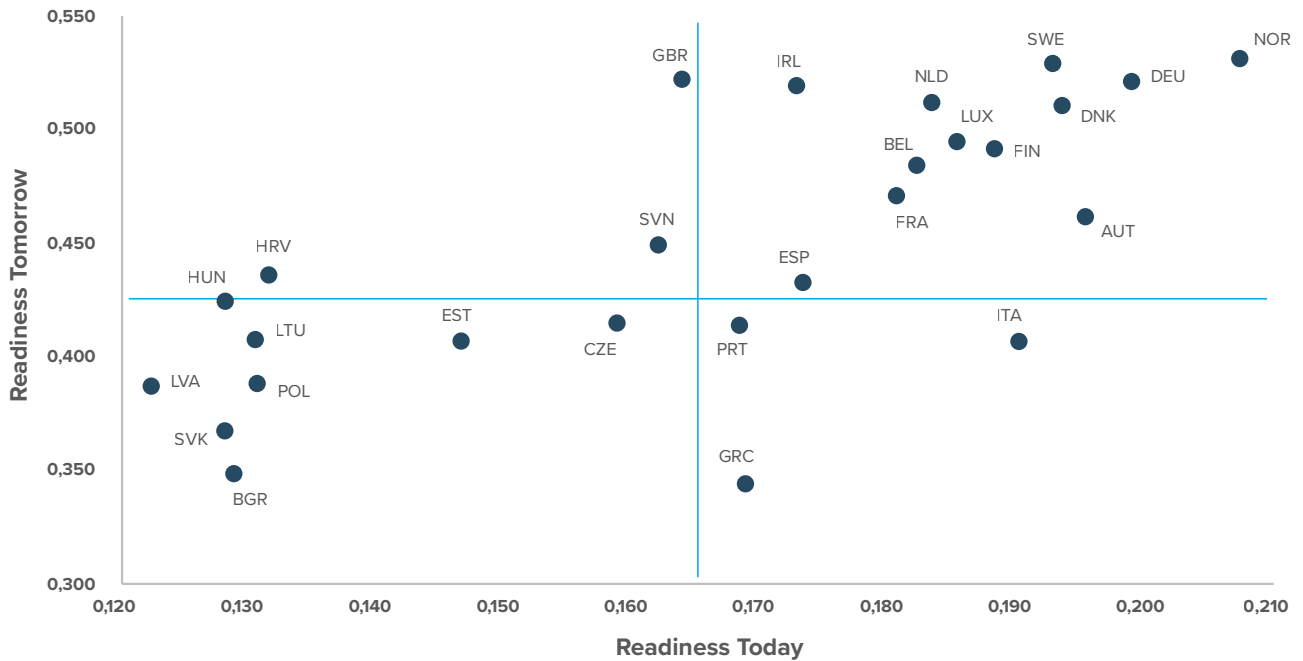
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Health Readiness Index 2022



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Readiness Today and Tomorrow distribution



If we divide ranked countries according to the point distribution of the readiness indicators today and tomorrow, we could split them into four quadrants with certain common features, as illustrated in the following figure.

1. Countries in this quadrant are likely prepared to tackle future challenges better than the current ones. These countries are characterised by relatively good access to medicines, e.g. due to the existence of early-access schemes, but overall poor access to medical diagnostics equipment (number of MRI, CT, and other diagnostics) and other factors significantly affecting the readiness of today.
2. This quadrant contains less developed countries with below-average expenditures on preventive care and an insufficient approach towards tackling issues connected to basic health determinants. Access to innovative care is rather poor, and similarly to countries in quadrant 1, the population reporting unmet needs is rather extensive. This is the worst quadrant, i.e. countries that are least likely to tackle future (nor current) challenges effectively.
3. This group basically consists of only one country (Greece) with above-average access to innovations. Based on the assessed data, significant issues are in care availability. The volume of reported unmet needs is also one of the worst in Europe. This fact is also confirmed by the significant lack of medical personnel per capita and explains the position of Greece on the chart.
4. This quadrant is mainly comprised of the most resilient countries with a high level of financing and sufficient HR and other resources needed to deliver quality care. These countries tend to focus strongly on determinants of health and preventive care, which is critical to future demand for healthcare services.

Conclusions

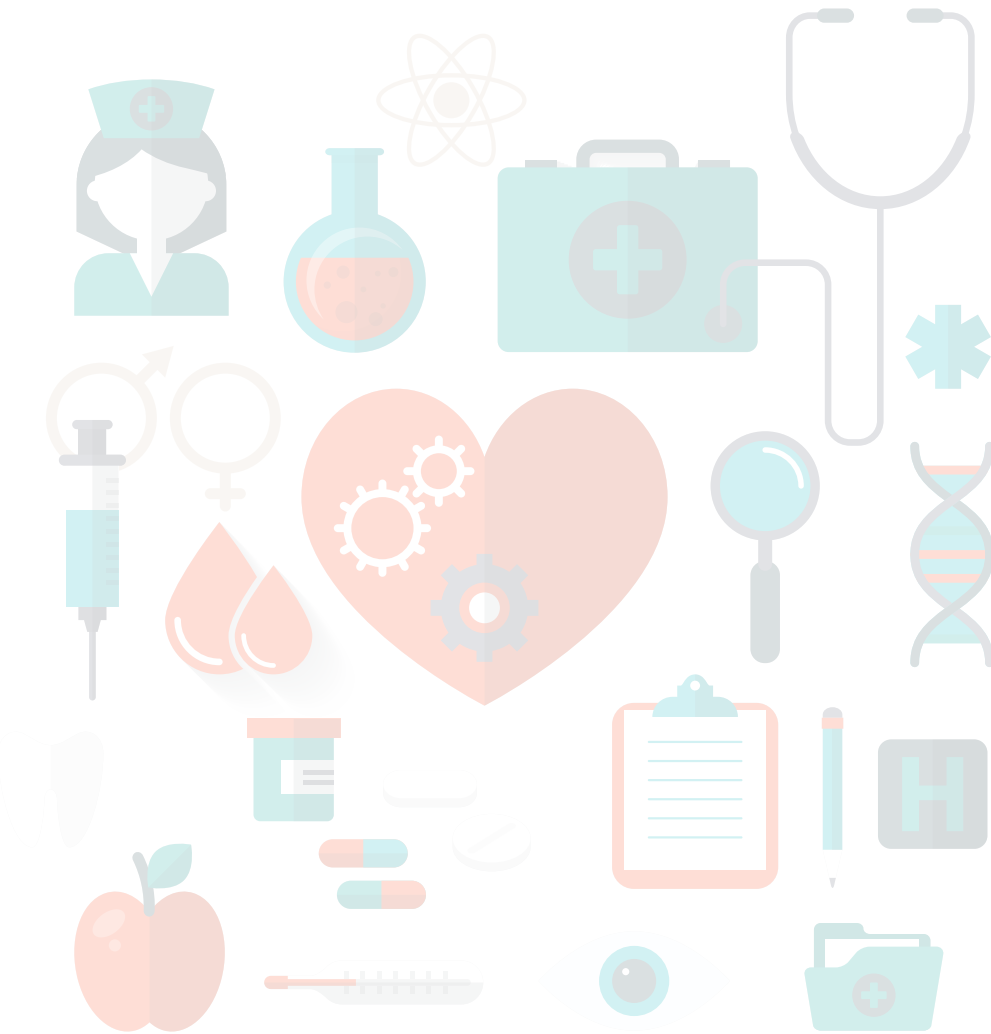
The health readiness of a country refers to its capacity and preparedness to address and respond to health-related challenges and emergencies. It encompasses various factors that contribute to a nation's ability to protect and promote the health and well-being of its population.

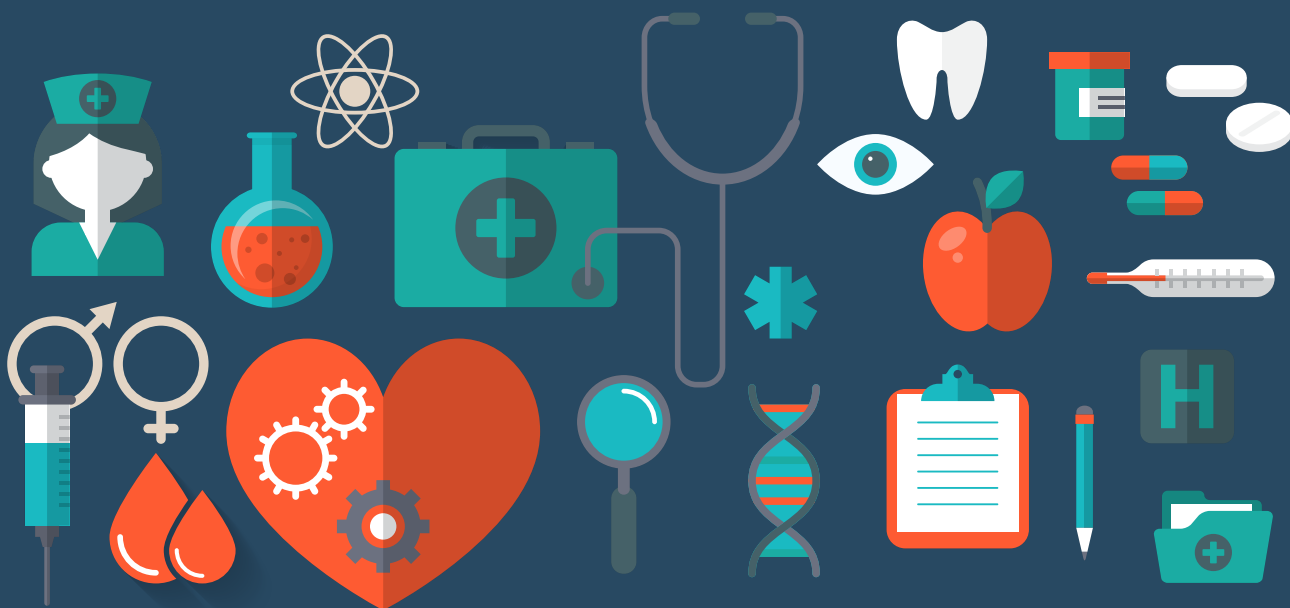
The key elements of a prepared, robust, and resilient system, as seen in the results of the HRI 2022, are not as related to the system's organisation. The index identified countries with similar results and different healthcare systems but also similar systems with very different results. The core components of a resilient system are as follows:

1. A robust public health system is crucial for disease surveillance, prevention, and control. This includes vaccination programs and public health interventions regarding availability and potential. The impact of health determinants, whose role in the population's health status must not be underestimated, is also a fundamental factor.
2. Health policy stability and continuity. Countries that have a long-term investment strategy and whose minister stays in office for at least the duration of a political cycle can lead their system towards better results in the long term.
3. There are never enough doctors, nurses, and especially other healthcare professionals who can often take over some competencies of higher educated colleagues.
4. Sufficient and sustainable funding mechanisms for healthcare are necessary to ensure the availability of required resources and services. Adequate investment in health infrastructure, personnel, medical technologies, and medical supplies is crucial for maintaining readiness. Funding is also strongly connected to innovation influx, which is one of the most

crucial aspects of a country's preparedness. Last but not least, countries with the best results often perceive healthcare expenses as an investment, not a cost.

It is important to note that a country's health readiness can vary widely depending on its level of development, available resources, and political commitment to healthcare. Regular assessments and investments are necessary to maintain and improve health readiness over time. In other words, current standings in the index can easily improve - or deteriorate if the system is neglected.





▶ Vajnorská 100/B
831 04 Bratislava
Slovak Republic

▶ +421 2 321 378 00
▶ info@globsec.org
▶ www.globsec.org