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The role of digitalisation in the
Swiss healthcare system

Swiss hospitals have an excellent reputation: they are among the best healthcare facilities in the world. However, the Swiss healthcare system is currently facing several challenges that could jeopardise this status. Could digitalisation offer a solution?

The Swiss healthcare system – like healthcare systems in other countries – is being put under pressure from various environmental and internal challenges, and this is having an impact on its excellent reputation.

Some of the most important factors challenging the quality of healthcare include a population that is growing larger and older, as well as the increasing number of people with chronic diseases, a shortage of skilled personnel, and high turnover in nursing staff. As a result, both healthcare costs and health insurance premiums are rising continuously.

At the same time, the pandemic has resulted in shortages of resources that are increasingly forcing healthcare professionals to assume additional roles, e.g. the compilation of extensive documentation or satisfying the ever more demanding requirements of the persons being treated. Among the results of this complex situation are longer waiting times and excessive demands being placed on healthcare personnel.

The wellness trend, the move from inpatient to outpatient treatment, and the remote monitoring of patients all have the potential to alleviate these threats and change healthcare for the better. Unfortunately, however, this is not currently the case: familiar obstacles such as obsolete IT systems, the lack of a framework for remunerating new business models such as "hospital at home", a lack of trust when it comes to the transfer of personal data, and the threat of cyberattacks all limit the possibilities for progress.

Digitalisation could play a fundamental role here in shaping the healthcare system of the future.

According to the most recent "Deloitte Swiss Digital Government Study", Switzerland is lagging internationally when it comes to the progress of digitalisation. Using this study as a basis, Deloitte collaborated with international students as part of their group work for the dual master's CEMS course of studies at the University of St. Gallen (HSG): What are the obstacles to digitalisation in the Swiss healthcare system, and how can they be overcome? What opportunities lie in creating the hospital of tomorrow, and what are the challenges?

## Digitalisation in the Swiss healthcare system: obstacles and opportunities

With the help of initial research, a first step involved identifying problem areas that are faced by patients, medical and nursing staff in daily hospital operations. These issues are related to available resources, time per person, compliance and data security, among others.

The management, chief physicians, senior physicians, assistant physicians, nursing staff and IT personnel are among the most important stakeholder groups relating to hospital digitalisation. They are the people who either make such decisions or implement digital initiatives. In addition, academic institutions were also included in the analysis to obtain a comprehensive picture from a scientific standpoint.

Subsequently, interviews were conducted with various people in different positions in Swiss hospitals and other institutions of the Swiss healthcare system, to gain a deeper understanding of the most important problem areas. These can be summarised as follows:

- *Hospital management*: Collective and overlapping problems such as profitability, financing and resource allocation in conjunction with the decision-making process for various stakeholder groups within the hospital.
- *Hospital processes*: Efficiency problems within the hospital operation, such as redundancies in administrative tasks in conjunction with workflows for various internal stakeholder groups in healthcare.
- *Patient needs*: Demand for additional hospital services, including social activities, in order to achieve a better experience and higher satisfaction along the clinical pathway.
- *Digital know-how*: A lack of know-how and innovation infrastructures that would allow hospitals to utilise new technologies for maintaining and optimising their operations and their competitiveness.
- *Digital transformation*: Obsolete internal business processes, fragmented requirements of various stakeholder groups and systemic barriers (e.g. canton-specific regulations) negatively impact the effectiveness, efficiency and well-being of healthcare personnel, something that in turn has an impact on the experience of patients and on their healthcare outcomes.
- *Patient data*: A lack of the digital competencies necessary for extracting essential information from personal data and utilising these data for the management, protection and utilisation of a data-driven healthcare.

**Other general obstacles to digitalisation include:**
- *Regulatory obstacles* whose impacts include making it more difficult to integrate medical technology.
- *Cultural obstacles* that render the collection of personal data more difficult on account of data protection concerns.

## On the way to creating the hospital of tomorrow in Switzerland

The healthcare system generally focusses its thoughts and actions on the people to be treated. However, this study outcome suggests a different prioritisation to overcome the obstacles to digitalisation: One of the critical success factors for the effective implementation of digital initiatives starts with orientating towards the hospital employees. Those being treated should not be the focus of digitalisation efforts because it's the medical specialists, nursing staff and ultimately the management who must support the digitalisation of hospital operations to meet the needs of the patients being treated. If medical professionals are not adequately trained, supported and/or made sufficiently aware, they themselves may become the biggest obstacle to the digitalisation of hospital operations.

Ironically, one of the primary reasons for this assessment lies in one of the greatest strengths of the Swiss healthcare system: its top-notch healthcare. Insights obtained in talks and interviews have revealed a common attitude: Why should we change anything when we are already doing such a great job?

Even so, some distinctions need to be drawn here. Analysis shows that there are generational differences in respondents' viewpoints. While younger people advocate innovative ways of working and new technologies, older respondents see qualified personnel and the government, e.g. establishment of suitable regulations, as effective levers to advance the Swiss healthcare system.

If medical professionals are trained in digitalisation and encouraged to prepare themselves for the digital world, employees will be able to do their work faster, more efficiently and with greater commitment. In return, they will be able to increase their productivity, reduce operating costs, and thereby ensure a high level of patient satisfaction and results.

## Time to act

Time is of the essence and the need for timely solutions to reduce costs, increase productivity, and ensure positive outcomes in hospitals is immense. To accelerate the digitalisation potential in Swiss hospitals and to cope with current obstacles, three steps are crucial:

1. *Using Change Management* to foster a digital awareness.
2. *Establishing digital competencies* by providing training for digital tools for all relevant personnel.
3. *Creating an ecosystem* with relevant stakeholder groups to jointly develop digital solutions that promote collaboration between the various parties in the healthcare system of tomorrow.

In summary, it can be said that political decision-making bodies and healthcare institutions must become aware of the fact that the Swiss healthcare system is facing fundamental generational, cultural and technological changes that place higher demands on patients and on medical and nursing personnel. The healthcare system of the future needs qualified professionals with skills that go beyond medical expertise to achieve the best-possible results for their patients. Overcoming the obstacle to digital in the Swiss healthcare system therefore requires an educational and collaborate approach. This will enable healthcare professionals and organisations to integrate their digital strategy to respond to future needs more efficiently and productively.

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