

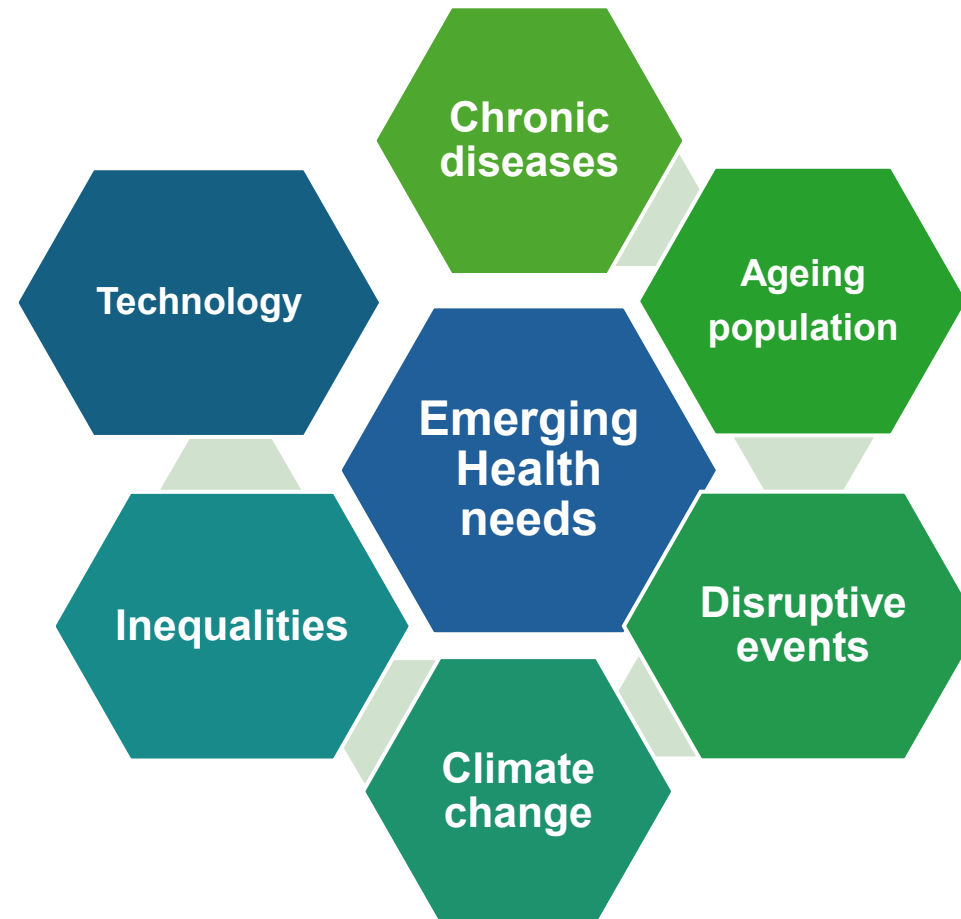
Transforming the healthcare delivery in Greece to meet emerging health needs

Labrina Barmpetaki

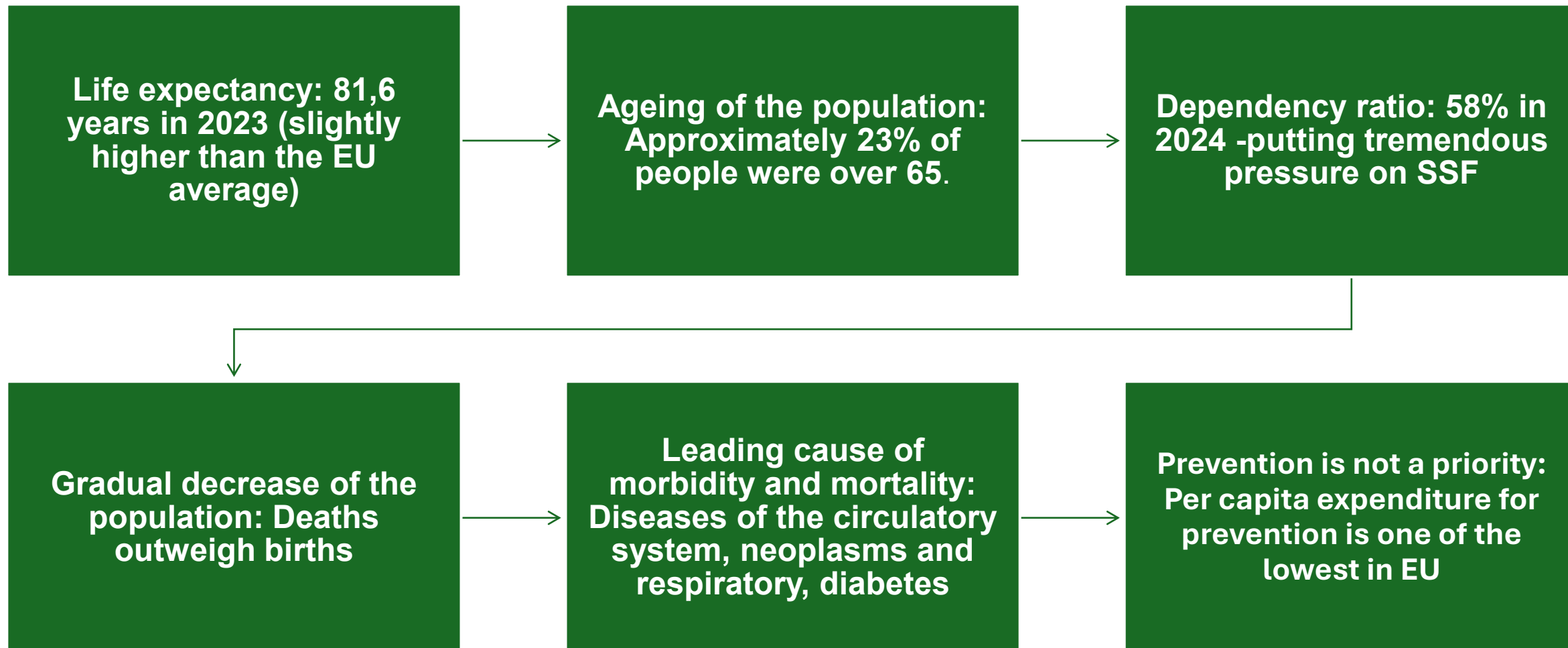
24 May 2025



Start with global perspective ...



Greece is in line with global trends with even more significant demographic pressure



On top of demographic pressure, there is a significant public health care underfunding

Public health expenditure as a proportion of the total health expenditure is 24% lower than the EU average

- Public health expenditure % total HE is 24% lower than the EU27 average
- Public health expenditure % GDP is 37% lower than the EU27 average
- Public health expenditure per capita is 65% lower than the EU27 average

Disproportionate burden transferred to patients

- Almost 8% of monthly household income is spent on healthcare
- Patient contributions totaled 734 m in 2023

Disproportionate burden transferred to pharma industry

- Pharma industry contribution totaled 3.5B Euros in 2023 and exceeded the total state budget on medicines

Putting healthcare delivery model in the Greek healthcare context



Fragmented and hospital centric health system



Disproportionate patient burden



Low levels of patient satisfaction



Unmet needs and inequity in access



Health workforce disproportionately located in urban areas



Different channels for medicines and inequitable allocation of funding



Significant delays in the access of pharmaceutical innovation



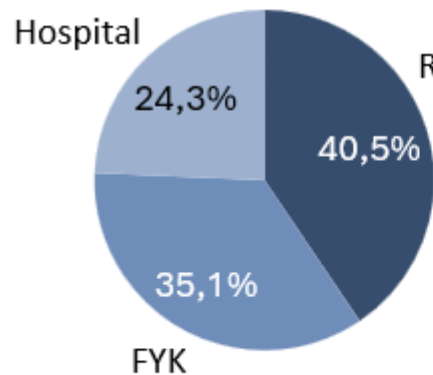
Lack of Predictability & Stability



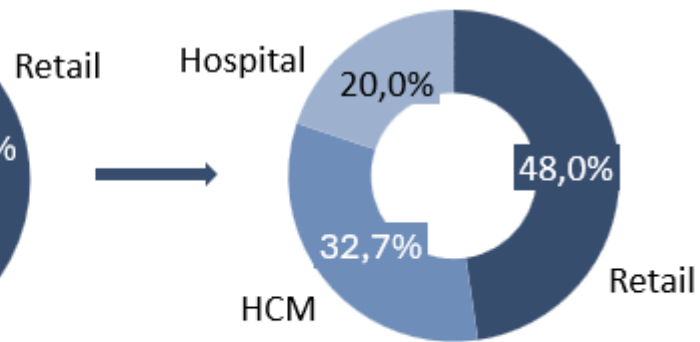
Inadequate digital infrastructure and data exploitation

Not only the level but also the distribution of public pharma budget set “sustainability” at the core of every policy discussion

2023 Expenditure split



2023 Budget split

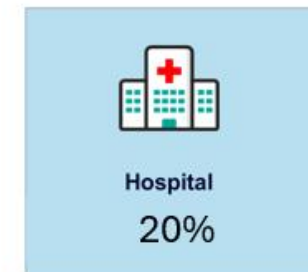


2023



2,644 Bn €

National Budget *



* Before RRF

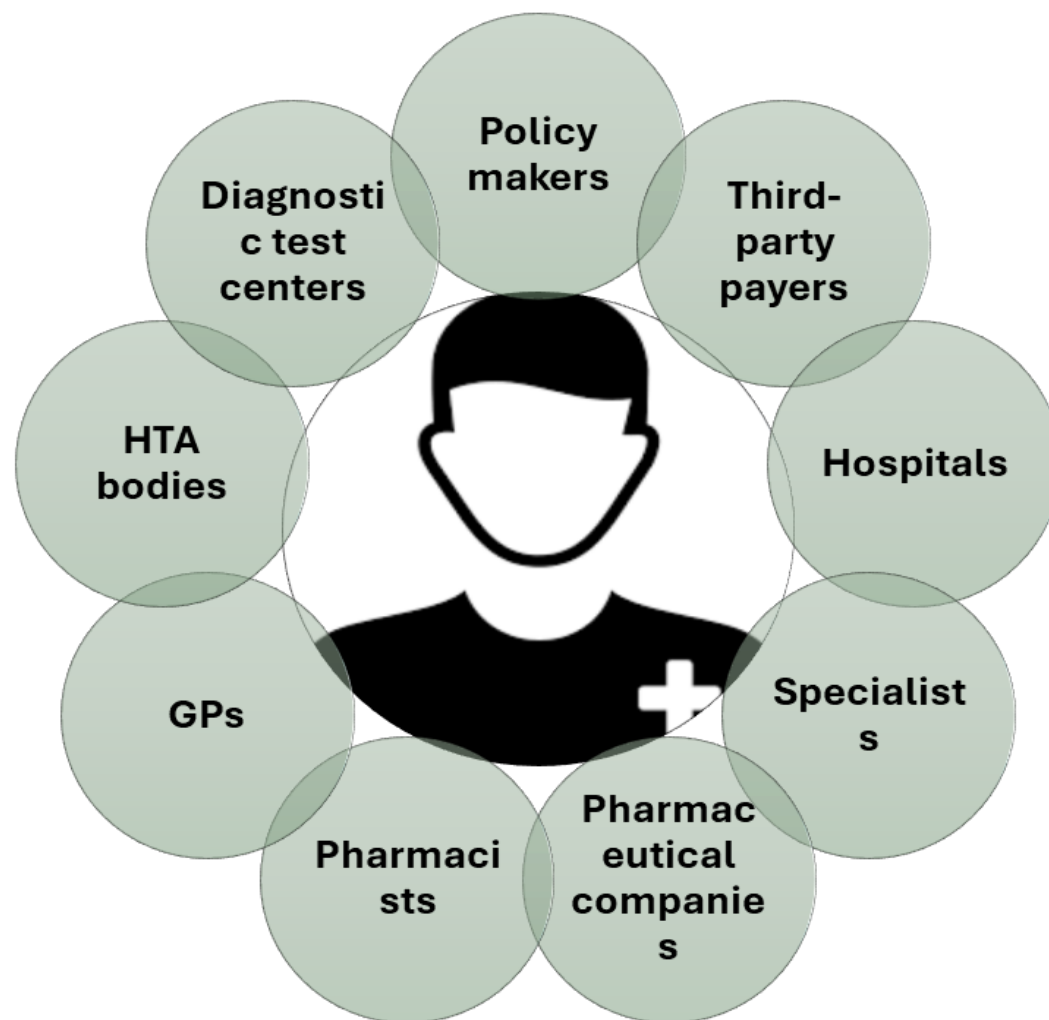
Paybacks % on invoiced

61,1%

79,0%
(>30€)

41,7%

Towards more patient-centric approach



Priorities and recommendations



PATIENT-CENTRIC HEALTH DELIVERY APPROACH

- ❑ Patient empowerment through education, health literacy, shared decision-making and self-management
- ❑ Focus on intervening early with the appropriate medication irrespective of the channel
- ❑ Challenge clinical inertia
- ❑ Ensure equitable access to high quality services irrespective of geography or socioeconomic status



ELEVATING STANDARDS OF CARE

- ❑ Expanding national clinical and therapeutic guidelines with a focus on attaining ambitious therapeutic targets
- ❑ Changing the disease course through the appropriate use of medicines that meet clinical and cost-effectiveness criteria
- ❑ Foster multidisciplinary and multisectoral collaboration to manage complex and chronic conditions
- ❑ Support continuous medical education
- ❑ Offer therapeutic solutions



DIGITALIZATION AND DATA DRIVEN DECISION MAKING

- ❑ Scaling up the digitalization of the health care ecosystem through utilizing EMR, e-prescription, registries and interoperability across providers and levels of care
- ❑ Utilize real-time world data and analytics to inform HTA and outcome-based agreements
- ❑ Leverage AI and digital tools to enhance prevention, early detection and care outcomes (personalized healthcare)

PIF's footprint at a glance

Pharma contribution to the healthcare delivery

360

CSR programs

In 2022 & 2023

CSR programs demonstrate a **strong commitment** to fostering community engagement, enhancing health outcomes, and **reducing healthcare disparities**. These initiatives highlight PIF's long-term dedication to sustainability and its mission to drive **meaningful societal impact**.

€2,5M

Invested in
2022 & 2023

**~€8 m from 2019 to 2021

267

Disease
Awareness
Campaigns

In 2022 & 2023

- Patient **education**, empowerment & **improved healthcare outcomes**
- Educating on **health conditions and treatment options**
- Fostering **proactive healthcare** decision making

> €5M

Total
investment
in 2022 &
2023

~ 10M from 2019 to 2021

158

Patient
Support
Programs

In 2022 & 2023

- Contribute to the **continuous advancement** of the healthcare sector
- Strengthen **collaborative initiatives** to enhance healthcare outcomes and drive **progress in medical research**
- Optimize drug development processes to ensure treatments effectively address **real-world patient needs** and challenges

€8,8M

Total
investment
in 2022 &
2023

~ 10M from 2019 to 2021

Thank you for your attention
