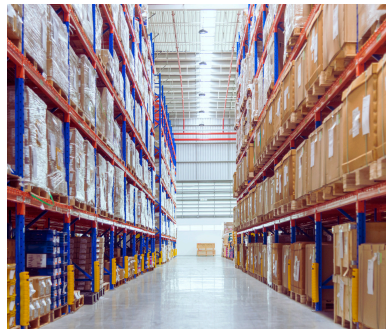




The Healthcare Chain Institute

*The Collaborative Platform
for a Smarter, More
Sustainable, and Seamless
Healthcare Value Chain*



Introduction

The Healthcare Chain Institute is an organisation founded on collaboration. We believe passionately that only by working together and bridging silos between stakeholders can we fix the challenges and seize the opportunities we see today in healthcare.

Monika Derecque-Pois
Founding Member
Healthcare Chain
Institute



We are living through a golden age of healthcare innovation, where breakthroughs in science, technology, and data are rapidly transforming what's possible for patients. At the same time, stakeholders are expected to deliver ever greater value, in an increasingly financially constrained environment.

Access and continuity of the supply of medicines remain fragile, with shortages creating problems for patients and providers alike. Digital transformation is happening, but often in a fragmented way, limiting visibility, slowing decision-making, and making it harder to fully utilise its capabilities. While there's clear momentum on improving sustainability, efforts across the value chain are not always aligned, with differing expectations feeding differing approaches.

The HCI is a practical organisation, from production to patient we are focussed on finding workable solutions that have impact. We are committed to bringing the whole healthcare value chain together – manufacturers, distributors, healthcare professionals, service providers, payers, and patients – with the goal of making healthcare provision fit for the future by bridging silos for the benefit of all.

We believe this can be done through collaboration leading to a seamless, sustainable, and digitally enabled ecosystem, responsive to patients needs. That in-turn will improve patient access, experience and wellbeing; and enables health systems to become more resilient, efficient, and responsive to growing needs and expectations.

If you share our passion and belief, then I encourage you to get involved. Only by working together than we make a real difference.

The background of the entire page is a photograph of a pharmacy shelf. It is filled with various boxes and bottles of medicine. Some boxes are white with orange and green patterns, others are blue, and some are yellow. The shelves are white and the lighting is bright, creating a clean and professional look.

A Platform for Change

The Healthcare Chain Institute is a not-for-profit, Brussels based membership organisation, founded in 2024, by a group of industry professionals with extensive end-to-end experience across the healthcare value chain.

What continues to motivate them is a strong conviction that the healthcare value chain needs to evolve to maximise the potential from new technologies and innovations, to address some of the underlying challenges limiting patient access to services and to improve patient outcomes.

They feel, it isn't a lack of commitment across the value chain that is holding change back, rather, it is system wide challenges that can only ever be addressed by all stakeholders, across the value chain, bridging silos and working together on shared solutions to these shared problems.

By harnessing the spirit of innovation, collaboration, and complex problem solving, that the health sector is recognised for, the HCI provides a platform and the tools for its members to develop and align on evidence-based and workable solutions, and is both a voice and catalyst for its members to drive change across the healthcare sector and in policy making.

Our Vision

Across Europe, the healthcare value chain is under growing pressure. Patients are experiencing more frequent challenges to access services and products, and supply disruptions ripple unpredictably across systems. The burden of cost, and complexity, is rising just as expectations around access, sustainability, and responsiveness intensify.

These pressures are compounded by structural barriers: siloed decision-making, limited transparency, challenging regulation, and uneven digital maturity. The system is stretched because it wasn't designed for today's challenges. Yet, the potential to build something better is within reach.

By working together and bridging silos across the public and private sectors, and along the full length of the healthcare value chain to patients, we can create something far stronger, a system that is:

- Resilient, better connected, and integrated
- Data-driven, responsive, and predictive
- Greener, smarter, and fairer
- Engaged, unified, and forward looking
- Collaborative, strategic, and trusted

Identifying Barriers to Change

Despite shared ambition across the sector, progress is often slowed by structural, cultural, and operational barriers and silos. Here's what we believe continues to hold the system back, and what HCI is specifically designed to help overcome:

Data Interoperability & Trust

- From manufacturers to pharmacies to regulators, systems across the value chain don't speak the same language.
- Data is often locked in silos, lacking common standards or secure sharing frameworks.
- Trust issues, whether these are commercial, legal, or cultural, limit collaboration and real-time insight.

Without trusted, interoperable data, we can't forecast demand, plan inventory, or respond to disruption efficiently

Non-Aligned Incentives Across the Value Chain

- What's good for one part of the chain can be costly or complex for another.
- No shared accountability model exists across procurement, production, distribution, and access.
- Sustainability and resilience goals often clash with immediate commercial pressures.

Without alignment, we risk duplication, bottlenecks, and missed opportunities for shared value

Lack of System-Wide Leadership

- Every stakeholder manages a piece of the value chain, but no one is tasked with stewarding the whole.
- This leads to reactive rather than strategic problem-solving, and missed coordination opportunities.
- The voice of the full supply chain is rarely unified in policy discussions.

Without shared leadership, we solve parts of the problem, but never the system as a whole.

Regulatory Inertia & Fragmentation

- National rules and EU frameworks can conflict or evolve slowly, especially in areas like digital health, ESG, and supply models.
- Innovation often outruns the regulatory environment delaying uptake of proven solutions.
- Companies face compliance friction when operating across borders.

A fragmented regulatory landscape creates uncertainty, slows investment, and stalls innovation.

Resource & Change Fatigue

- Organisations are stretched financially and operationally, after years of rapid adaptation.
- Even necessary change feels burdensome, especially if value isn't clear or immediate
- There's often too little time to reflect, plan, or experiment

Overloaded teams need trusted, credible frameworks that focus effort where it counts most.

Our Current Priorities

In close collaboration with our partners and Advisory Board, we have begun to focus on three interconnected priorities that are of importance to all stakeholders across the healthcare supply chain and integral to our mission to bridge silos and accelerate change:

Patient Access & Continuity of Supply:

How do we ensure patients get the right medicines in the right place, at the right time? With a focus on stronger visibility, better planning, and more resilient supply models.

Digitalisation:

How do we unlock the potential of data-driven innovation across the value chain? From demand forecasting to traceability, automation, and patient insight, while addressing concerns about data privacy and use.

Environmental Sustainability:

How do we embed aligned and climate-conscious best practices across supply chain? Ensuring sustainability practices deliver both material benefit to business and the desired environmental change, without compromising patient access.

Each priority is tackled through a dedicated working group, guided by an impact orientated framework and built around tangible deliverables, driving alignment and consensus while providing a basis for strong governance.

Priorities for 2026 and beyond will be discussed and agreed with our members.

Our Way of Working

HCI brings together healthcare value chain actors, associations, patient representatives, innovators, healthcare professionals, payers, and policymakers from across the healthcare landscape. We convene focused working groups, build shared frameworks, and support pilot initiatives that translate insight into action.

Our model is collaborative, member-led, and solutions-focused. Each working group is shaped by expert input, real-world challenges, and shared ambition, supported by our Innovation Platform, which enables ideas from our partners to be modelled and scaled. We don't duplicate what others do. We connect what's already working, and help it work better together.

We believe that HCI and its members have a role to play in providing insight and solutions for policy makers. Ensuring that policies and regulations are realistic, effective and efficient and avoid additional burden and cost; while creating an environment that encourages and supports growth and innovation.

The output of our work includes reports, guidelines, pilot programmes, and other tools to ensure the change desired is targeted at the right audiences in a constructive and engaging way.

HCI uses the **Birgli Decision Guidance System**® to help each working group focus on what matters most. By bringing together diverse perspectives, from policy, clinical, commercial, IT, and procurement teams, the Birgli System allows us to identify Key Impact Factors (KIFS) and Sub Impact Factors (SIFS) that informs a:

- Structured prioritisation of goals and initiatives.
- Transparent evaluation of benefits, risks, and resource trade-offs.
- Shared decision dashboard that brings clarity and collective ownership.
- Agile process that adapts as challenges evolve.

In short, it makes our collaborative ambitions practical, ensuring that HCI's priorities are aligned, actionable, and evidence-based.

Working Groups

Patient Access & Continuity of Supply (PACS) Working Group

“Keeping Medicines Flowing”

The PACS Working Group brings together manufacturers, distributors, HCPs, regulators, and patient advocates to build a more connected and proactive approach to current challenges and opportunities across the healthcare value chain, to improve and ensure patient access is maintained and they get the right medicines in the right place, at the right time.

Focus areas include:

- Discontinuation of supply and access to medicines and the impact on patients
- Challenges and opportunities of electronic patient information
- The impact of innovative stockpiling strategies and assessment of current stockpiling policies
- Data transparency to support access, continuity of supply and improve demand planning, to build greater supply chain resilience.

We collaborate on ways to improve access to medicines for patients, through coordinated strategy, policy alignment, and smarter logistics.

Working Groups

Digitalisation (DIGI) Working Group

“Harnessing the Power of Data”

The Digitisation Working Group focuses on transforming the supply chain from a patchwork of systems into a coordinated, data-enabled network, that can drive a revolution in efficiency, resilience, and effectiveness.

Key initiatives:

- Mapping data system interoperability and master data challenges
- Enhancing inventory optimisation and demand forecast accuracy
- Advancing real-world data use and patient-centred visibility
- Preparing for EHDS and other health data reforms
- Exploring AI, digital twins, and predictive modelling
- Assessing the impact of upcoming and new regulation

We believe that by connecting data, we can unlock new value, faster responses, better outcomes, and greater transparency.

Working Groups

Environment, Sustainability , & Governance (ESG) Working Group

“ Designing a Greener and Smarter Supply Chain”

ESG is no longer optional, it's essential. The ESG Working Group is helping members align climate ambition with operational performance to ensure sustainability and good governance practices deliver both material benefit to business and the desired change, without compromising patient access to vital medicines.

Priority areas include:

- Scope 3 emissions mapping, CSRD compliance, and assessing the Omnibus Legislation
- Lessons for sustainable packaging and circular logistics
- Procurement standards and regulatory alignment to drive
- Transparency, traceability, and smarter design

Together, we're building a greener healthcare chain, one that reduces waste, lowers costs, and responds to growing expectations from patients, partners, and regulators.

Benefits of Membership

By joining HCI, your organisation becomes part of a trusted community committed to practical change. Members benefit from:

- A seat at the table on pressing supply chain challenges
- Access to expert-led working groups and the HCI innovation platforms
- Intelligence and insights on policy, digital, and sustainability trends
- Opportunities to shape pilots, co-develop frameworks, and engage decision-makers
- Access to all HCI events including webinars, and in-person forums exploring emerging supply chain opportunities
- Visibility, credibility, and a unified voice across the healthcare ecosystem

For more information about joining HCI please contact us at:



info@healthcarechaininstitute.org



<https://www.linkedin.com/company/hci-the-healthcare-chain-institute>



www.healthcarechaininstitute.org

Meet Our Founding Members



Monika Derecque-Pois

Founder and lead
Consultant Cetan Ltd
Former Director General
GIRP Former EMVO
President and Board
member



Charles Gloor

Founding Partner Birgli Ltd
Founder and Former Head
Movianto (previously AVS
Health – Celesio)
Experienced Global NED
and Trustee



Andy Richmond

CEO Pharmasupply
Advisory
Former GM and Chair of
Pfizer Export B.V.
International Trade &
O2C Expert



Martin Fitzgerald

Director Digital Health and
Public Policy Healthcare ,
GS1. Founder and FBS Ltd
Former Deputy Director
General GIRP



Andrew Bonser

Founder & Director
Numaris Corporate Affairs.
Former SVP at Cencora,
and previously held senior
roles at WBA, Pfizer, and
Intuitive Surgical

Meet Our Advisory Board



Henry Ames

General Manager, Supply Chain
Work Management; Tracelink



Dr. Rafik Bishara

Former Director of Quality &
Knowledge Management; Eli
Lilly



Dr. Philippe Brunet

Previous Head of Cabinet
Commissioners for Health A. Vassiliou
and M. Kyprianou
Previous Head of Unit in charge of
pharmaceutical legislation



Eddy Gilissen

Senior Director Supplier Alliances,
IQVIA. Board member APDA,
African Pharmaceutical
Distribution Association.



Nina Heinz

Senior Logistics executive life
sciences supply chain
management



Lukas Pachinger

BioPharma executive with +25 years of
experience in international finance,
supply chain and digital transformation
leadership roles



Eduardo Pisani

Public affairs, health policy, market
access executive. Held leadership
positions in corporations, trade
associations and non-profit
organizations



Milena Richter

Public affairs leader with nearly 30
years experience in EU affairs and
policy in the pharmaceutical
industry.



Paulien Schul, PharmD MBA

Owner Change for PS and co-
founder of HEALTH-fi GmbH
Patient Services & Specialty
Services Specialist



Prof. Dr. DI Christa Wirthumer-Hoche

Regulatory Affairs Expert
Former Head of the Austrian Medicines Agency
Former Chair of the EMA Management Board

