



The Healthcare Chain Institute

Advancing knowledge and collaboration across the healthcare value chain



One Healthcare Value Chain. One System

The Healthcare Chain Institute is an independent and neutral not-for-profit institute created to bring a whole-system perspective to questions that cross traditional boundaries, combining evidence and expertise to develop knowledge, shared understanding and practical approaches that others can use.

Healthcare is built on deep expertise. Manufacturers, distributors, healthcare providers, pharmacies, technology companies, policymakers and regulators each bring specialist knowledge and capability.

But some of healthcare's greatest opportunities, and challenges, lie in the connections between them.

A decision that makes sense in one part of the value chain can have consequences elsewhere. For example, a shortage can look like a forecasting challenge to a manufacturer, a stock challenge to a distributor, an access challenge to a pharmacist, a system challenge to a regulator, and a health risk to a patient.

Each perspective is valid. Understanding the whole requires us to connect them, and that connection is key to finding workable and balanced solutions for better patient care.



Manufacturers



Distributors



Technology
Companies



Hospitals



Pharmacies



Policy makers and
regulators



Patients and patient
advocates

Healthcare Works Better When We Work Together

Healthcare is entering a period of extraordinary change. Scientific innovation, digitalisation and new models of care are creating opportunities to improve health and patient outcomes, while economic, environmental and geopolitical pressures are placing new demands on healthcare systems and the organisations that support them.

The healthcare value chain is made up of highly capable organisations, each with its own expertise, responsibilities and perspective. But many of the challenges and opportunities facing healthcare today extend across those boundaries.

That is where the Healthcare Chain Institute has a role to play.

HCI develops evidence and insight into the interdependencies that shape the healthcare value chain, drawing on research, data and real-world expertise. We bring together relevant perspectives from across healthcare, policy, academia and beyond to test that evidence, deepen understanding and develop practical approaches that can inform policy and decision-making.

Our work focuses on important and emerging questions where a whole-value-chain perspective can add new understanding and practical value, from medicines security, shortages and strategic reserves to data and digitalisation, environmental sustainability, healthcare resilience and preparedness.

As an independent and neutral Institute, HCI does not represent a single sector or interest. We complement the work of trade associations and other representative organisations by examining questions that extend across traditional organisational and sector boundaries.

Our ambition is practical as well as intellectual: to build knowledge that can be used, whether through research, shared definitions, methodologies, frameworks, policy recommendations or new approaches that help stakeholders make better-informed decisions.

As our agenda develops, our founding belief remains unchanged: by combining evidence, expertise and perspectives from across the healthcare value chain, we can help shape better healthcare.

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



**Monika
Derecque-Pois**
Chief Executive
Healthcare
Chain Institute

Innovation is Transforming Healthcare

Our opportunity is to ensure the healthcare value chain evolves with it.

Advances in medicines, diagnostics, technology and data are changing what healthcare can achieve. Realising their full potential increasingly depends not only on individual innovation, but on how effectively the wider healthcare system can anticipate, adopt and respond to change.

HCI's vision is of one healthcare value chain that is:



Connecting the value chain can help turn individual innovation into system-wide impact.

Three Priorities. One Connected Ambition

HCI focuses its research, expertise and convening power on three closely connected conditions for a future-ready healthcare value chain.



Access

Patient Access,
Medicines Security &
Resilience



How do we ensure medicines and innovation reach patients reliably? Our work examines shortages, strategic reserves, preparedness, supply resilience and the conditions that support continuity of availability.



Insight

Data, Digitalisation,
Predictive Planning



How do we anticipate what comes next? We explore how data, standards, digital capability and better evidence can support earlier understanding and better-informed decisions.



Sustainability

Sustainable Healthcare
Value Chains



How do we create value that lasts? We examine sustainable procurement, environmental impact, Scope 3 emissions, circularity and the relationship between sustainability, affordability and resilience.

These priorities reinforce one another: better insight strengthens resilience; resilience protects availability; better planning can reduce waste and improve efficiency; and a more efficient value chain can be more sustainable, cost-effective, and better prepared.

Where the Work Happens

Three priorities. Three Working Groups. Practical outputs.

HCI's priorities are advanced through Working Groups bringing together members and invited experts from across the healthcare value chain. Each group combines evidence, expertise and structured analysis to produce knowledge and practical approaches that can be used beyond the room.



PACS

Patient Access & Continuity of Supply Working Group

Developing more coordinated, evidence-based approaches to medicines security, shortages and preparedness.

- Mapping reserve and contingency models across European Member States.
- Developing the 5 Es assessment model – Evidence, Effectiveness, Efficiency, Equity and Equilibrium – to assess resilience and reserve policy.
- Establishing shared terminology for reserves, safety stock, triggers and operating models.
- Developing 'Towards Smarter Reserves Policy in Europe', aligned with the evolving European policy environment.

The ambition: move from isolated responses towards smarter, more coordinated approaches that strengthen resilience and protect patient access.



DIGI

Data & Digitalisation Working Group

Exploring the data, standards and digital capabilities needed for a more predictive healthcare value chain.

- Mapping digital-readiness gaps and friction points.
- Reviewing the European digital-policy landscape for shortages, resilience and medicines information.
- Exploring how digital signals can support earlier detection and preparedness.
- Developing minimum requirements around data standards, interoperability and governance.

The ambition: move from retrospective understanding towards earlier insight and better-informed decisions.



ESG

Environment & Sustainability Working Group

Connecting environmental ambition with the operational realities of the healthcare value chain.

- Mapping sustainable procurement practice and environmental criteria across Europe.
- Examining emerging environmental policy and extended producer-responsibility models.
- Developing priorities around life-cycle assessment, Scope 3 emissions, circularity and procurement.
- Engaging with expert initiatives on environmental data, standards and proportionality.

The ambition: develop practical approaches that allow environmental performance, resilience, availability and affordability to be considered together.



How HCI Works

Independent. Evidence-based. Collaborative

HCI applies a structured approach to questions that cross the healthcare value chain. We combine evidence, expertise and different perspectives to build understanding, test options and develop practical approaches that others can use.



Explore **Define the questions**

Identify where a whole system perspective can add new understanding and frame the question to be answered.



Convene **Bring the right perspectives together**

Convene expertise from across the healthcare value chain, policy, academia, advocacy, and other relevant fields.



Evidence **Build and test the evidence**

Draw on research, data and real-world experience to understand the issue and the interdependencies behind it.



Analyse **Turn evidence into insights**

Apply structured methodologies, including HCI's 5 Es and VIRTUE, and the Birgli Decision Guidance System® to assess options and make the reasoning behind conclusions transparent.



Develop **Translate insight into practical approaches**

Translate findings into shared definitions, frameworks, recommendations and assessment tools that can support policy, strategy and decision-making.



Inform **Put the knowledge to work**

Share findings through publications, policy dialogue, expert engagement and collaboration.

HCI in Action: 2025–26

From shared questions to practical work

Over the past year, HCI has moved from establishing its agenda to developing evidence, methodologies and practical thinking around some of the most important questions facing Europe's healthcare value chain.

1 Rethinking Strategic Reserves

How can Europe strengthen medicines resilience while balancing cost, efficiency, sustainability and patient access?

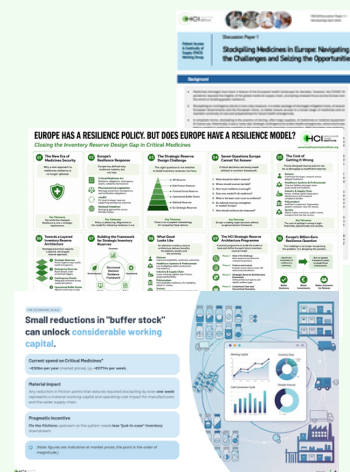
Through PACS, HCI has examined medicines shortages, stockpiling and strategic reserves across the healthcare value chain – looking beyond the quantity of stock held to understand the wider consequences of different approaches to preparedness.

The work includes:

- mapping reserve and contingency approaches across European Member States;
- developing shared terminology around shortages, safety stock, strategic reserves, triggers and operating models;
- developing the 5 Es – Evidence, Effectiveness, Efficiency, Equity and Equilibrium as a framework for assessing different approaches;
- developing towards Smarter Stockpiling in Europe, aligned with the evolving European policy environment.

The emerging insight:

Resilience is not simply about holding more stock. It is about understanding what to hold, where, why and for how long, while considering the consequences for the wider healthcare value chain.



2 Making Sustainability Operational

How can environmental ambition translate into practical decisions across the healthcare value chain?

HCI's ESG work is examining how environmental requirements interact with procurement, supply, cost and availability, bringing together policy ambition and operational experience.

The work includes:

- mapping sustainable procurement practice and environmental criteria across Europe;
- examining life-cycle assessment, Scope 3 emissions, circularity and procurement;
- considering emerging environmental policy and extended producer-responsibility models; and
- engaging with expert initiatives around environmental data, standards and proportionality.

The emerging insight:

Environmental performance, resilience, affordability and patient access are interconnected. Effective approaches need to understand the trade-offs and opportunities between them.



From Insight to What Comes Next

Connecting the questions across the healthcare value chain

HCI's work is increasingly showing that resilience, access, sustainability, cost and data cannot always be considered separately. Understanding how they interact is central to developing more effective approaches.

3 From Data to Earlier Insight

How can better information help healthcare move from reacting to disruption towards anticipating it?

Through DIGI, HCI is exploring the digital foundations of a more predictive healthcare value chain, including data availability, standards, interoperability, governance and the signals that could provide earlier understanding of emerging pressures.

The work includes:

- mapping digital-readiness gaps and friction points;
- reviewing the European digital-policy landscape for shortages, resilience and medicines information;
- exploring how digital signals can support earlier detection and preparedness;
- developing minimum requirements around data standards, interoperability and governance.

The emerging insight:

The value of data lies not simply in what each organisation can see, but in what the healthcare system can understand earlier. Connecting signals across the value chain can turn visibility into foresight – and foresight into preparedness.



4 Seeing the Connections

The work across HCI's programmes is revealing important interdependencies

- Resilience affects access.
- Inventory affects cost and sustainability.
- Data affects preparedness.
- Procurement choices affect supply.
- Environmental policy can affect affordability and availability.

This is where a whole-system perspective adds value: understanding the connections between questions that are often considered separately.



What Comes Next?

The same approach is opening new areas for HCI to explore.

The questions will change but HCI's role remains the same: bring together the evidence and perspectives needed to understand them as a system.

Who We Are

HCI is led and advised by senior healthcare leaders with experience spanning the healthcare value chain, from medicines manufacturing and distribution to regulation, pharmacy, digital health, logistics and public policy. Together, they bring the breadth of perspective needed to understand complex healthcare challenges across organisational and sector boundaries.

HCI Leadership Team



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



Andrew Bonser

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



Lukas Pachinger

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



Martin Fitzgerald

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

HCI Advisory Board

The Advisory Board strengthens HCI's work by bringing independent expertise and perspectives from across the healthcare value chain. Its members help inform the Institute's priorities, challenge and test its thinking, and ensure its research, methodologies and practical outputs remain relevant to the policy, regulatory and operational realities of healthcare. Together, its members help ensure HCI combines intellectual rigour with real-world relevance.



Henry Ames

General Manager, Supply Chain Work Management - ZoomLogi



Maarten Van Baelen

Healthcare policy and advocacy executive bridging science, strategy, and leadership across life sciences and EU health systems



David Earnshaw

Public policy & communications professional. Senior industry roles at the EP, GSK, Oxfam, MSD, and Burson (CEO & Chair, 2002-16); EU policy lead at MSD (2016-24), Senior Adviser at BOLDT BPI.



Stephan Gotthardt

Senior Supply Chain Executive | Transformation & Restructuring Strategist | 35+ years of professional experience | Former SVP EU Supply Chain Teva and Managing Director of Merckle GmbH



Nina Heinz

Senior Logistics executive life sciences supply chain management



Gregory van Lier

Independent researcher and strategic science, climate, and EU policy expert with 25+ years bridging research, regulation and impact.



Eduardo Pisani

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



Milena Richter

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



Annabel Seeböhm

Founder & CEO at Health4.EU | Ex Secretary General at COCIR & CPME | Supporting innovators in digital health, law & policy



(Regulatory Advisor) Prof. Dr. DI Christa Wirthumer-Hoche

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

Be Part of What Comes Next

Understand the forces shaping your organisation. Help shape the solutions.

Many of the issues businesses are contending with cannot be addressed by one organisation alone. Medicines shortages, regulatory change, sustainability requirements, fragmented data, inventory and working-capital pressures, supply resilience and preparedness all involve decisions and dependencies across the healthcare value chain.

HCI membership gives organisations a place to understand these challenges as a whole, contribute their expertise and work with others to develop evidence and practical approaches that can support better decisions.

 Insights Bring your expertise into important policy and system questions while approaches are still developing.	 Influence See beyond your own part of the healthcare value chain.	 Rigour Turn complex questions into evidence and practical approaches.	 Return Focus collective expertise on issues with real operational and economic consequences.
Understand how emerging policy, market and operational pressures are being experienced elsewhere in the system and how decisions made in one part of the chain can create implications upstream and downstream. This broader perspective can help organisations anticipate change, identify interdependencies and make better-informed decisions.	HCI provides an independent environment in which members can contribute evidence and experience to emerging issues, helping develop practical thinking that can inform future policy, regulation and implementation.	Participate in structured programmes that combine research, data and real-world expertise. HCI's methodologies and shared frameworks help members examine complex issues systematically and develop evidence that can support internal decision-making and external engagement.	HCI's work addresses challenges that can affect cost, risk and performance, from supply disruption and excess inventory to duplicated effort, sustainability requirements, limited visibility and inefficient planning. By examining these issues across the value chain, members can help identify approaches that would be difficult for individual organisations to develop alone.

Membership puts you inside the work.

Members can participate in HCI Working Groups, contribute to research and emerging programmes, access HCI frameworks and publications, take part in roundtables and policy dialogues, and connect with senior expertise from across the healthcare value chain.

HCI is for organisations that recognise that some of the challenges affecting their future extend beyond their own boundaries, and that better evidence, broader understanding and practical collaboration can help address them.

If that describes your organisation, we should talk.
info@healthcarechaininstitute.org



Healthcare works better when the value chain works together

Connect. Collaborate. Help shape what comes next.



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