

# The Big Strategic Rotation

Reorganizing a Healthcare Economy  
Around the Production of ‘Cardiometabolic  
Health’

Part of Blue Spoon’s ‘Harnessing the Carnival’ Series  
of Different Frameworks, Unique Concepts and Original Ideas to Inspire  
the Next Generation of Health Market Leaders

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The Global Leader in Positioning Strategy at a System Level



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Which is the opportunity....

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# Creating Gravitational Pull

“Ecosystems” are economic systems with the gravitational pull to reset how a market works, or they become channels themselves, with the power to enable new categories of products and services that are native to the new system.

The process knowledge to construct industry ecosystems from scratch – to intentionally combine market fragments in an organized and persistent way – is the foundation to the ‘next \$100 billion in growth’ from what Andreessen Horowitz calls the “mother of all markets.”

The **health market stack** positioned here can spark a new economic system centered on the production of cardiometabolic health, one whose annual revenue is roughly \$440 billion, depending on the market combinations. It centers on the concept of **market interoperability** to enable new health and economic value. The potential payoff for this kind of structural shift is significant: it can open entirely new growth trajectories for the ‘pieces and parts’ aligning on value around shared marketplace, while at the same time changing the impact, and government burden, of diabetes + obesity worldwide.

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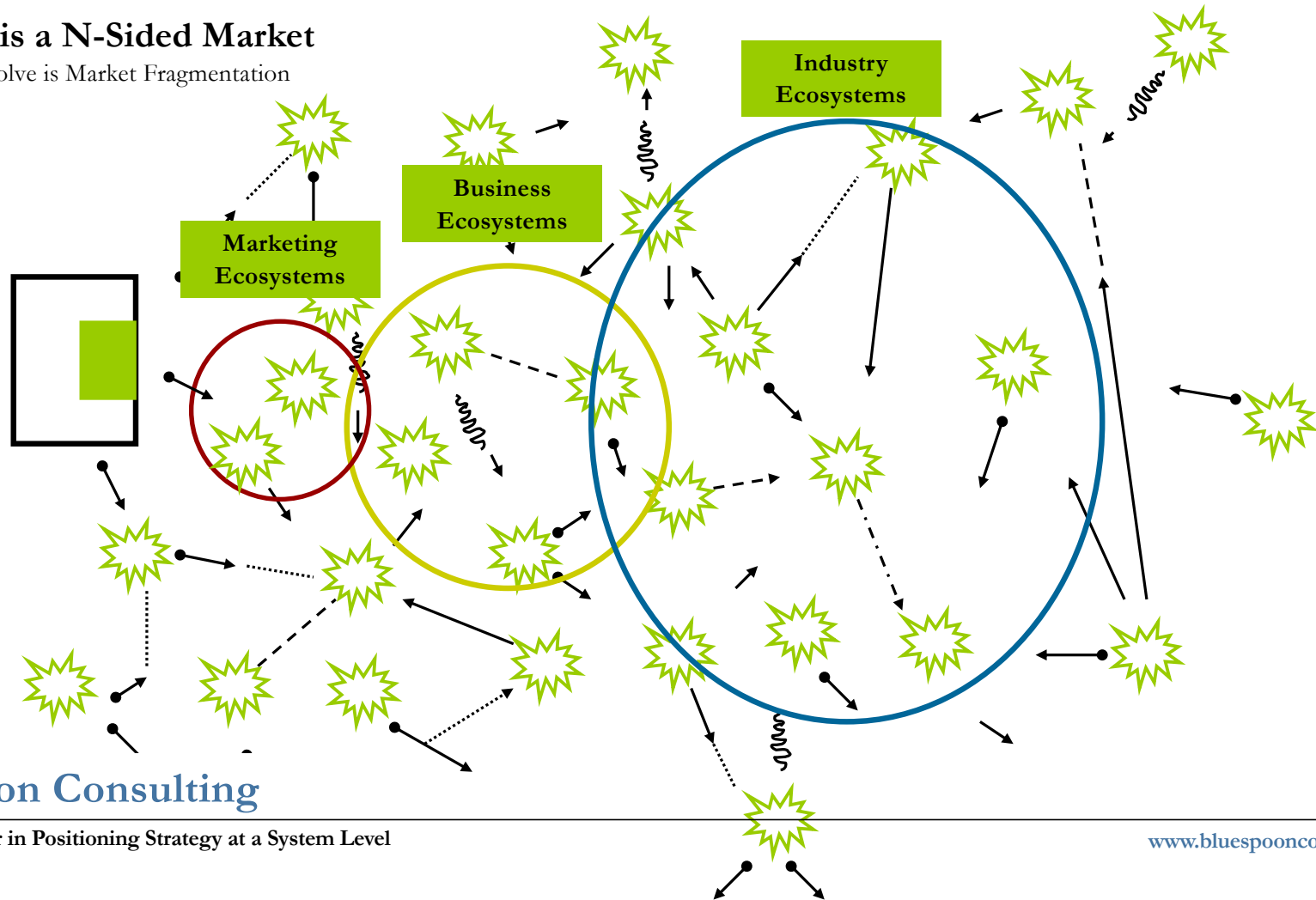
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# Healthcare is a N-Sided Market

The Problem to Solve is Market Fragmentation



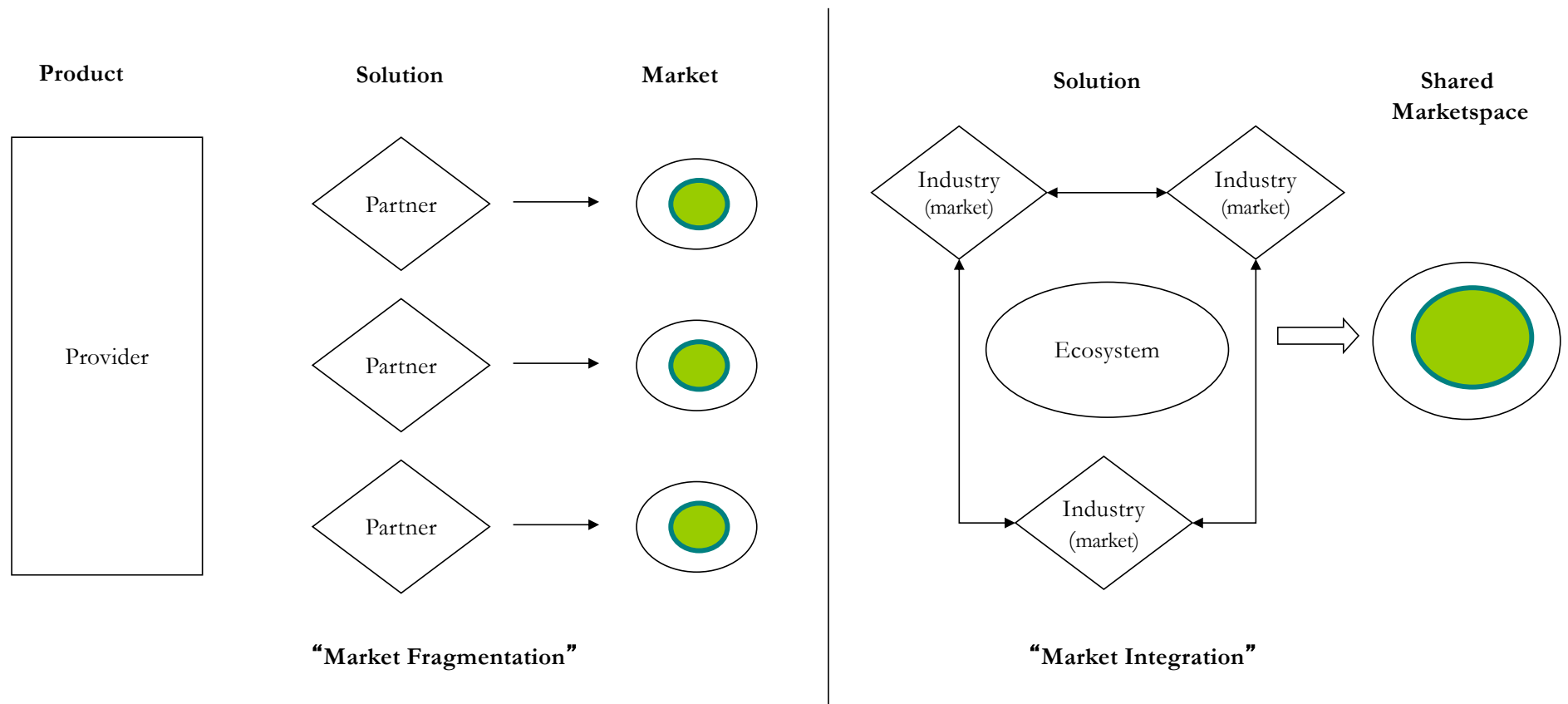
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# ecosystem-centered market strategy

DESIGN A NEW 'SYSTEM OF MARKETS' TO OPERATE AS A SINGLE ORGANISM



# ecosystem design matrix: “cardiometabolic” rough mix

AN ECONOMIC SYSTEM WITH ANNUAL REVENUE OF AROUND \$440 BILLION

MARKET SET	CONTINUOUS GLUCOSE MONITORING MARKET (\$17 Billion)	TECHNOLOGY SERVICES MARKET – BPaaS (\$300 Billion)	DRUG MARKET - GLP-1 (\$100 Billion)	PERSONALIZED NUTRITION MARKET (\$23 Billion)
Market Option 1	FreeStyle 	wipro 	Lilly 	 - <b>BASF</b>
Market Option 2	<b>dexcom</b>	Infosys® Navigate your next 	 novo nordisk®	V I O M E
Keystone Partner Option				
Keystone Partner Option				

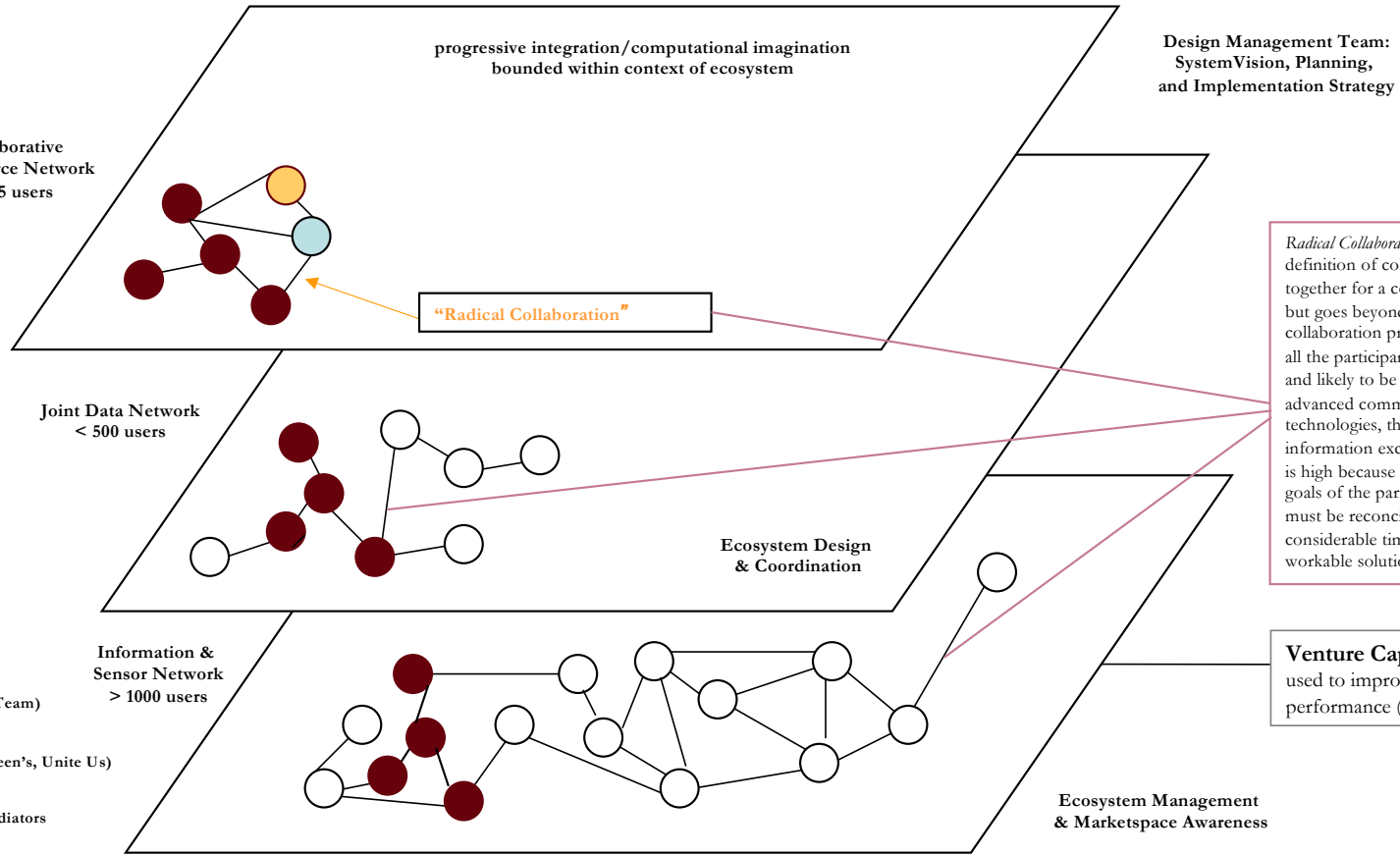


# The 'Health Market Stack'

A New Economic System Centered on Producing 'Cardiometabolic Health' (Illustrative)

- Dexcom
- Lilly
- ExxonMobil
- Microsoft

Information Timeliness:  
Months  
Weeks  
Days



*Radical Collaboration* fits the working definition of collaboration (working together for a common purpose), but goes beyond it in that the collaboration process is continuous, all the participants are highly active and likely to be using a variety of advanced communication technologies, the amount of information exchange and discussion is high because the perspectives and goals of the participants differ and must be reconciled, and there is considerable time pressure to reach workable solutions.

**Venture Capital**  
used to improve system  
performance ('system value')

- Keystone Players (Design Management Team)
- Niche Players (E.g., Blue Yonder, Walgreen's, Unite Us)
- Government, Public Health, Science Mediators
- New Markets, Space for Computability

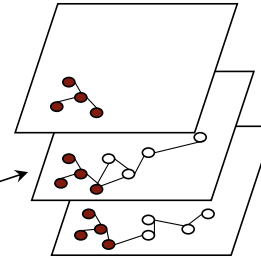


# Strategic Vision for a Global Market Scope

Manage a Portfolio of New Health Ecosystems Worldwide

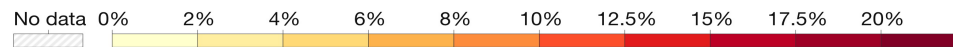
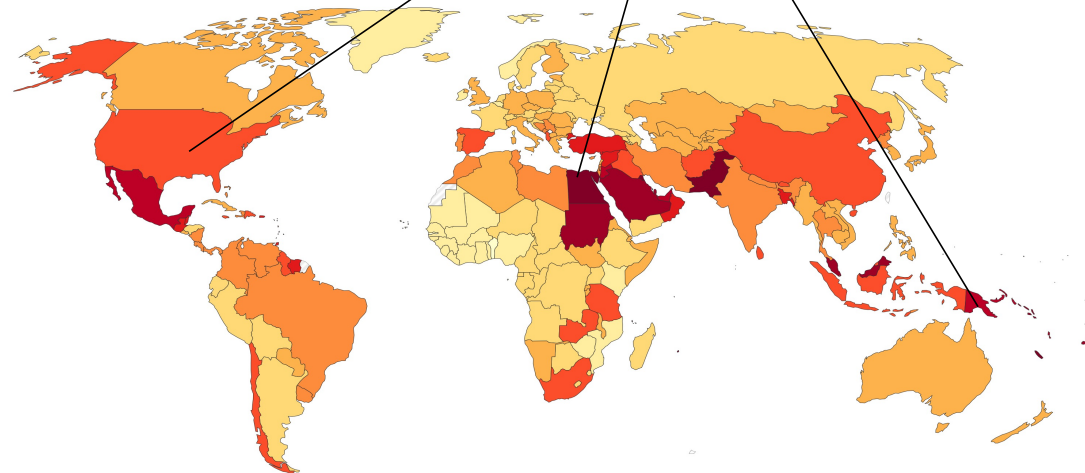
## System-Level Performance Measures<sup>1</sup>

- Health outcomes (population level)
- Resource utilization (direct and indirect)
- Economic performance (state and country)
- Market dynamics (ecosystem components)
- Emergence (innovation and ideas)



## Diabetes prevalence, 2021

The share of people aged 20-79 who have diabetes<sup>1</sup>.



<sup>1</sup>See also:

**China's Tech Hub Shenzhen Moves Ahead with GDP Alternative that Measures Value of Ecosystem Goods and Services**

Gross ecosystem product (GEP) system is the total value of final ecosystem goods and services supplied to human well-being in a region annually.

He Huifeng, *South China Morning Post* March 24, 2021

Source: International Diabetes Federation (via World Bank)

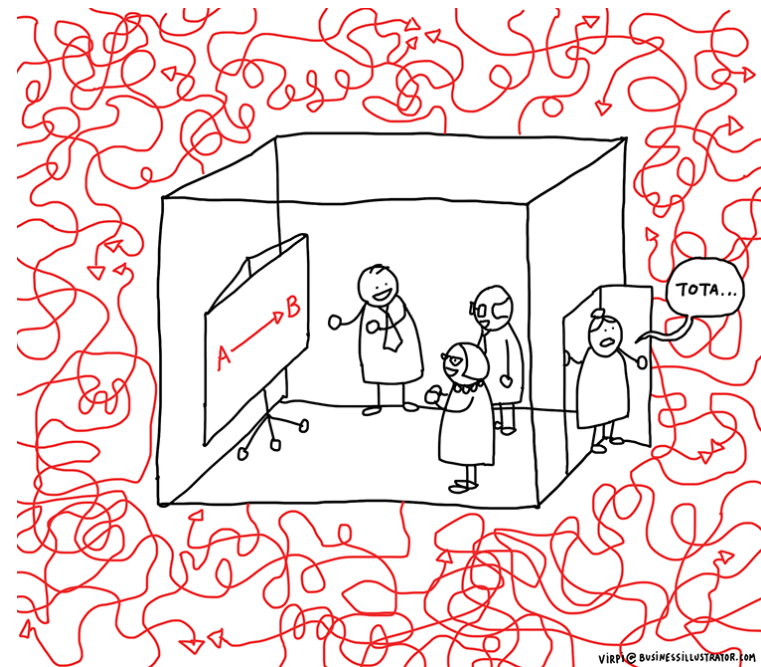
OurWorldInData.org/burden-of-disease • CC BY

# Dealing with Complexity

The era of linear solutioning is over.

And while avoiding ambiguity and shying away from complexity is understandable, pretending it doesn't exist is foolish at best and fantasy at worst.

It's time to work with a whole new framework for growth and market development. Outcomes happen at a system level. The locus for a modern strategy should be the same.



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# Niels Bohr to Wolfgang Pauli:

“We are all agreed that your theory is crazy. The question that divides us is whether it is crazy enough to have a chance of being correct.”

