



Healthcare Consolidation: Winners, Losers and Policy Implications

November 9, 2015

**The Ritz Carlton-Georgetown
Washington DC**

9:30 a.m. Coffee and Continental Breakfast

10:30 a.m. Welcome and Introduction

Stuart Altman, Ph.D., Professor of National Health Policy, Brandeis University

10:45 a.m. Provider Consolidation: Trends, Outcomes and Emerging Policies

Healthcare providers have consolidated at a rapid rate as health systems merge and physicians increasingly become hospital employees. Proponents argue that these transactions increase their ability to provide integrated care and manage population health. Opponents believe that consolidation is lessening competition and leading to higher prices. This session will profile trends in horizontal and vertical (physician-hospital) transactions and review evidence about their impact on prices and quality. It will then review recent merger cases and discuss current and future Federal Trade Commission policy.

Presenters: Lawton Burns Ph.D, Professor, The Wharton School
Tara Koslov, Deputy Director, FTC Office of Policy Planning

12:00 p.m. Lunch

12:45 p.m. State Approaches to Addressing the Effects of Provider Consolidation

States have played active roles reviewing proposed mergers and some have responded by negotiating arrangements whereby mergers proceed with limits on the future conduct of the merged entity. As many markets are already highly consolidated states are actively considering policies to ameliorate excessive growth in health spending. This session will discuss a range of options that may be available of states, as well as the advantages and disadvantage of conduct remedies and other mechanisms to constrain spending growth.

Presenters: Robert Berenson MD, Senior Fellow, The Urban Institute
Karen Tseng, Health Care Division Chief, Massachusetts Office of the Attorney General

2:00 p.m. Break

2:15 p.m. Insurer Mega-Mergers: Will They Benefit Consumers?

Two major insurance mergers were announced this summer, which would consolidate the nation's five largest carriers into three health plans. Part of the rationale for these combinations is to increase bargaining power with large health systems. There has been much debate about the potential impact of these mergers on health insurance premiums. This session will discuss the factors the Department of Justice is likely to consider as it evaluates the merits of the proposed mergers and panelists will discuss potential benefits and harms that could result from insurer consolidation.

Moderator: Stuart Altman, Ph.D, Professor, Brandeis University

Panelists: Jack Rowe, MD, Professor, Columbia University
Josh Soven, Partner, Gibson Dunn
Mindy Hatton, General Counsel, American Hospital Association
George Slover, Consumers Union
Jon Kingsdale Ph.D, Wakely Consulting Group
Charles Kennedy, MD, CEO Accountable Care Solutions, Aetna

3:30 p.m. Meeting adjourns