



HEALTHCARE

2018

IDOM

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INTRODUCTION



The global landscape of healthcare is complex and heterogeneous. In terms of funding, coverage or efficiency, there are important differences between healthcare systems across the World.

While there are many countries with equitable and accessible healthcare services, there are still many who are working to achieve universal healthcare coverage. These healthcare systems focus mainly on providing curative medicine, resolving the immediate problems of the population. Prevention is not high on the agenda, and healthcare expenditure is low. The provision of healthcare is, to a greater or lesser extent, inefficient.

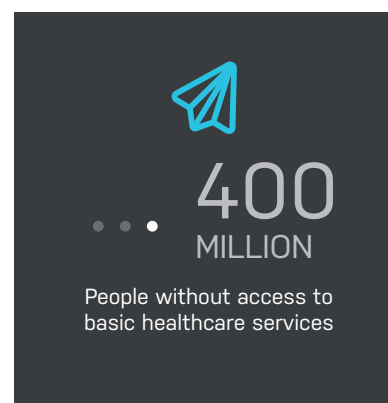
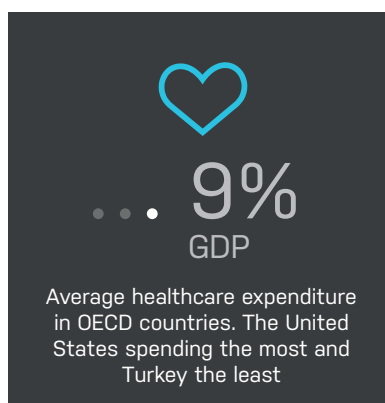
There are also countries facing even more fundamental challenges, countries where the main causes of death are infectious diseases, with high birth rates and infant mortality, and low life expectancy. On the other end of the scale, there countries with low birth and mortality rates, but where there is a high prevalence of chronic noncommunicable diseases.

In the countries belonging to the OECD, the average life expectancy at birth is 81 years. The average

healthcare expenditure is 9% of GDP. According to the latest figures of the OECD, at 17.2% the United States has the highest expenditure, while, at the other end, Turkey spent 4.3%. In turn, 54% of adults are overweight and 19% demonstrate some degree of obesity, with the United States, Mexico Hungary and New Zealand at the top of the list. The level of smoking and alcohol abuse has decreased in OECD countries, however on a global scale, they still pose a serious health risk.

According to the World Health Organization (WHO) and the World Bank Group, there are approximately 400 million people in the world without access to basic health services. Along with other agencies, these organizations have been fighting to improve this situation. In recent decades, healthcare coverage and the level of financial protection have been increased.

However, there is still a lot to do.



CHALLENGES FOR THE HEALTHCARE SECTOR

A healthcare system which is *healthy* should guarantee access to quality healthcare services, develop sound preventative medicine, efficiently manage its financial resources, while impacting positively on the overall well-being of the population. The intrinsic relationship between the integral wellbeing of the population and the economic growth of a country has been well documented.

What is needed is a virtuous circle (a complex chain of factors that reinforces itself through a feedback loop). Within the healthcare system, the patient is central to factors or concepts such as investment, efficiency and innovation.

Prevention is a basic requirement in a *healthy* healthcare system. The measures taken for disease prevention are extremely important, and can stave off or eliminate chronic noncommunicable diseases, which are clearly growing, due in part to the increase in life expectancy of the population.

On the other hand, not only is it important to prevent or delay the onset of disease in a previously healthy patient, it is also important to implement a series of actions to control diseases, thereby avoiding further complications which can be serious and costly.

The UN, through the Sustainable Development Goals, has been dealing with these issues, among others.



A healthy healthcare system must guarantee access to quality healthcare services





Another challenge facing fast developing countries, as can be seen in the population pyramids, is an increase in the investment required to provide geriatric care services. Lessons are to be learned from societies that are experiencing changing demographics/population ageing, and that, in the future, will undergo epidemiological changes similar to more advanced countries.

The panorama facing these economies supposes the diminution of the transmissible infectious diseases and an increase in chronic noncommunicable diseases. In terms of diagnosis, treatment and monitoring, these pathologies are costly. Complications can occur that, if not adequately controlled, impact considerably on the quality of life of the patient, and the financial resources of the healthcare system.

The above evidences that healthcare systems need to change the focus of their efforts. An important change is needed the strategic approach, taking a real long-term vision, a new approach to operations centered on the quality of patient care, while building on the assets and capacities of the different actors of the healthcare ecosystem. The patient must also participate in the procurement of their healthcare services.

From a clinical perspective, perhaps one of the most important problems facing the global population, is the challenge of antimicrobial resistance. Combating communicable infectious diseases is ever more difficult. An increase in these diseases in the near future, together with microorganisms which are ever more resistant to existing antibiotics, requires governments to work together with the private sector to develop innovative therapies to mitigate this latent risk.

GLOBAL TRENDS

Healthcare is an important public expenditure for any country, therefore it is necessary to find alternative sources of financing. Strategies must be designed and implemented to efficiently use available resources.

The private sector can be an important strategic ally. Healthcare providers could be compensated, not just for their clinic activities, but also for the positive impact they have on the health of the patient. Providing an integral catalog of services can reduce costs, therefore, this model should be strengthened and expanded on.

In addition to the above, healthcare information technologies are being developed along with numerous applications for healthcare systems. Examples of these

include the management of patients suffering from chronic noncommunicable diseases; in many cases the patient is given a referral, when what is really required, is the support to monitor and manage the disease. Tools are also being developed to diagnose certain diseases and offer solutions to reduce the distance between patients and specialized medical staff.

It is also necessary to empower society, by introducing initiatives to reinforce preventive education, and raise awareness of the importance of adequate treatments for diseases, emphasizing the importance of healthy habits: a balanced diet that meets nutritional needs, or a controlled diet to control a disease, either to eliminate it or reduce complications.



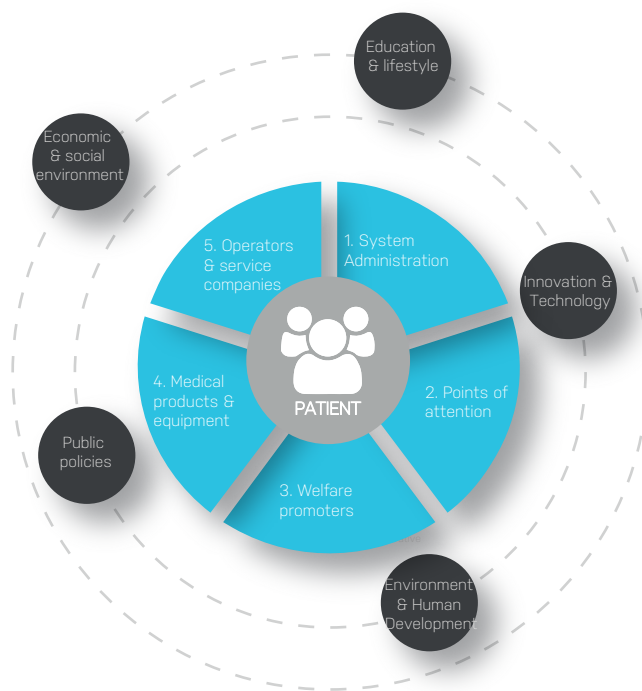
IDOM'S APPROACH TO THE HEALTH SECTOR

IDOM has a vision of the healthcare sector where the patient takes center stage, surrounded by all the actors of the sector: healthcare providers, welfare promoters, manufacturers of medicines and medical devices, as well as service providers and the healthcare system administrators. These actors respond to the various factors that impact on their activity and the mindset of the population.

To achieve such an ambitious goal, it is not only necessary to manage and allocate resources correctly, intersectoral action must be carried out to cover, at least, the basic demands of the population - potable water, food security, access to quality education, or greater sources of employment – while not forgetting the investment required to develop necessary infrastructure.

We believe that the level of access of the general public to healthcare should be increased. Several countries are making efforts in this direction, however, there is still a long road to travel. To achieve this objective - included in the Sustainable Development Goals (UN) – a diagnosis of healthcare systems must be made, to allow decision-makers take advantage of the strengths and opportunities detected.

Adequate treatment is needed for infectious diseases, which in countries with limited resources remains a public health problem. Proper treatment and monitoring of non-communicable diseases is also needed, which in more developed countries are the main cause of premature death or years of ill-health. Along with enhanced prevention, these are the main healthcare needs demanded by the global population.



PATIENT

From our perspective, the patient is the epicenter of the healthcare ecosystem. Their characteristics, conditions, requirements and needs are the levers that influence the evolution of the rest of the actors.

ACTORS

We see these as the traditional agents within the healthcare ecosystem. New agents who are not normally involved in healthcare issues will join this group.

ELEMENTS OF THE ENVIRONMENT

We understand the elements of the environment to be the dynamic factors that converge together and influence the actions and decisions of the patients and the actors of the healthcare ecosystem.

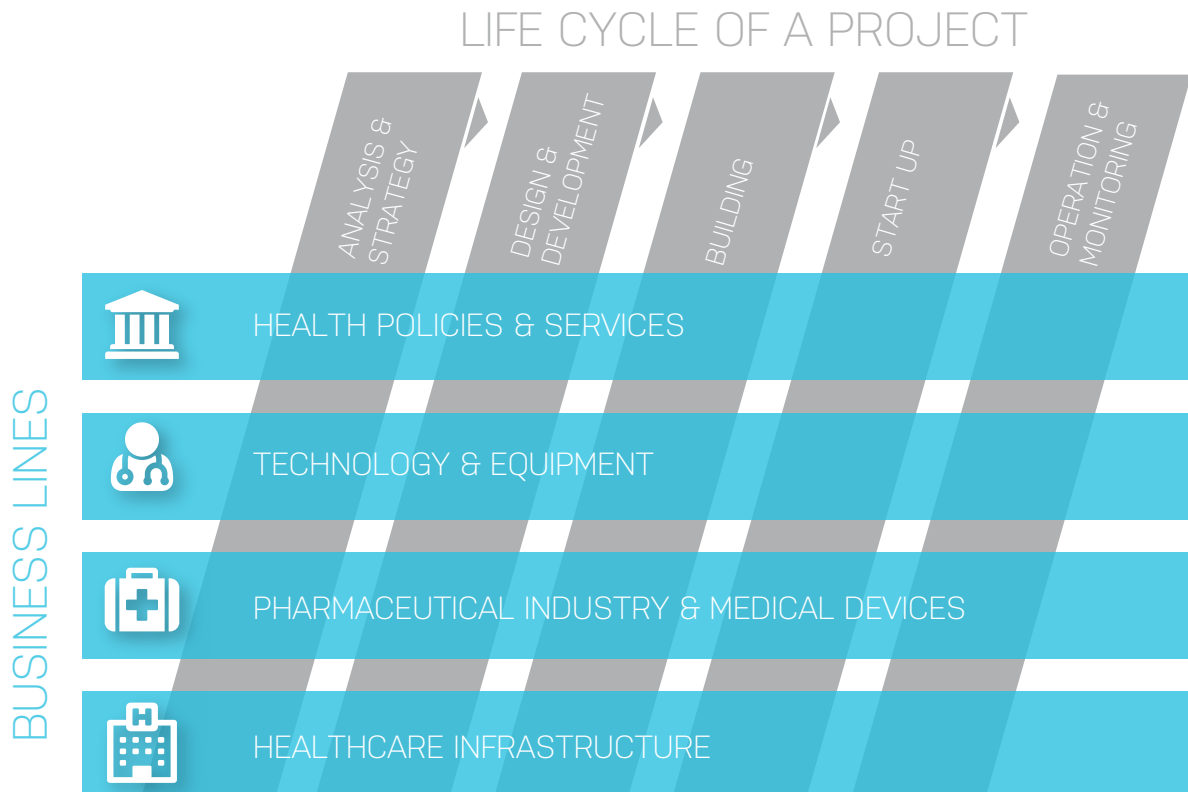
SOLUTIONS

The solutions offered by the Healthcare Division of IDOM cover the entire lifecycle of the project – analysis, strategy, operations and monitoring – including the intermediate phases of design and development, and the final phases of construction and commissioning/hand-over. We work with the public sector, NGOs, and the private sector in 4 expert business areas:

- **Healthcare Policies & Services:** We provide consulting services in the fields of healthcare policies and healthcare services for public and private clients; including healthcare system administrators, welfare promoters and medical attention points.
- **Technology & Equipment:** We work with organizations involved in healthcare management,

thereby guaranteeing that information systems and equipment provide end-to-end solutions, from the IT strategy to the implementation of the solutions.

- **Pharmaceutical Industry and Medical Devices:** We support companies in the pharmaceutical and medical device industries offering integrated solutions for production, distribution, commercialization, helping them achieve their growth objectives.
- **Healthcare Infrastructure:** We are highly experienced in the development of feasibility studies and functional programs, the architectural and engineering design, as well as the construction management of hospitals, research centers, laboratories, and other health facilities.





Cesar Valle
 General Manager IDOM Healthcare Division
 Email cesar.valle@idom.com
 Tel. +52 1 55 5508 0958



Sandra Sinde
 Innovative Public Procurement Manager
 Email ssinde@idom.com
 Tel. +34 620 916 313



Silvia Balmaseda
 Technology & Equipment Manager
 Email sbalmaseda@idom.com
 Tel. +34 616 927 312



Fernando Núñez
 Health Policies & Services Manager
 Email fernando.nunez@idom.com
 Tel. +52 1 55 8531 6659



María A. Sánchez
 Healthcare Infrastructure Manager
 Email mangeles.sanchez@idom.com
 Tel. +34 628 147 283



Pier Federico
 Nuclear Medicine Manager
 Email pierfederico.briani@idom.com
 Tel. +34606579402

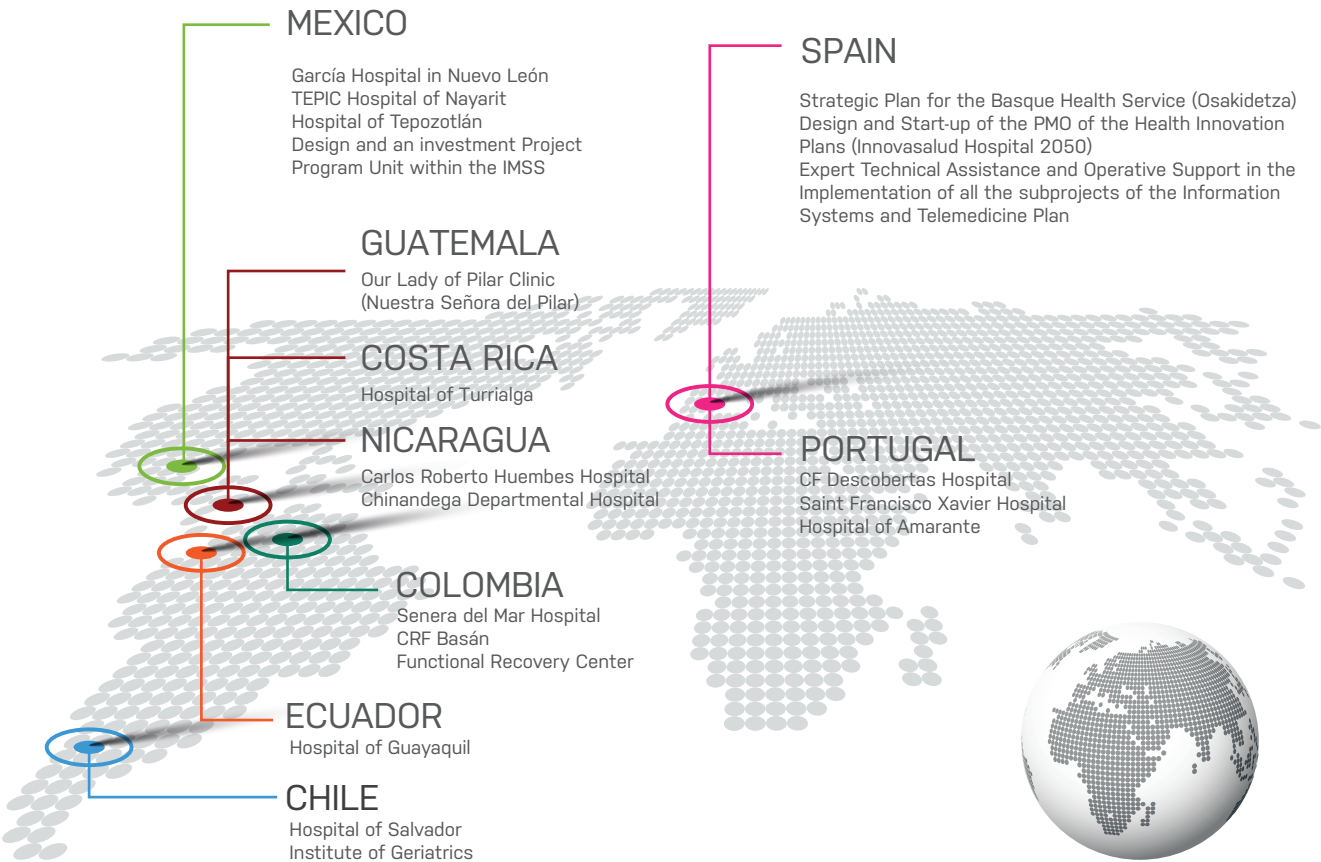


Carlos Salto
 Pharmaceutical & Medical Device Industry Manager
 Email carlos.salto@idom.com
 Tel +52 1 55 1952 5607

HEALTHCARE TEAM

The Healthcare Team at IDOM has been collaborating in several different countries, planning and designing new healthcare infrastructure, supporting the client

in the process of strategic thinking, and ultimately helping diverse actors grow. IDOM has also worked extensively in the development and planning of eHealth and e-Innovation.



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HEALTHCARE IDOM



MEXICO

Ciudad de México

Paseo de la Reforma 404 - Piso 5
Colonia Juárez, Delegación Cuauhtémoc
06600 Ciudad de México
T: +52 55 5208 4649
F: +52 55 5208 4358



SPAIN

Madrid

Avda. Monasterio de El Escorial, 4
28049 Madrid
T: +34 91 444 11 50
F: +34 91 447 31 87

Bilbao

Avda. Zarandoa, 23
48015 Bilbao
T: +34 94 479 76 00
F: +34 94 476 18 04



CHILE

Santiago de Chile

Paseo Huérfanos 670, Piso 26
8320196 Santiago de Chile
T: +56 223800720



COLOMBIA

Bogotá

Carrera 15 n°. 88-21 oficina 603
Edificio Torre Unika Virrey
Bogotá 110221
T: + 57 1 4320510

