



M.I.M GROUP

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Global Health *Industry Overview*

May 2010

Jim Sanderson
CEO & Managing Principal



Executive Summary

Agenda

- I. Globe Perspectives**
- II. Development Opportunities**
- III. Strategy Scenarios'**
- IV. Summary – Term Sheet**

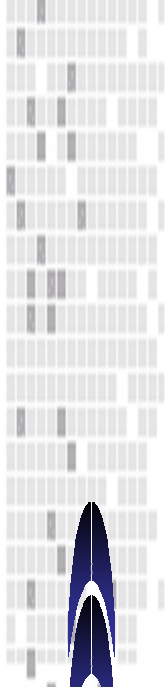
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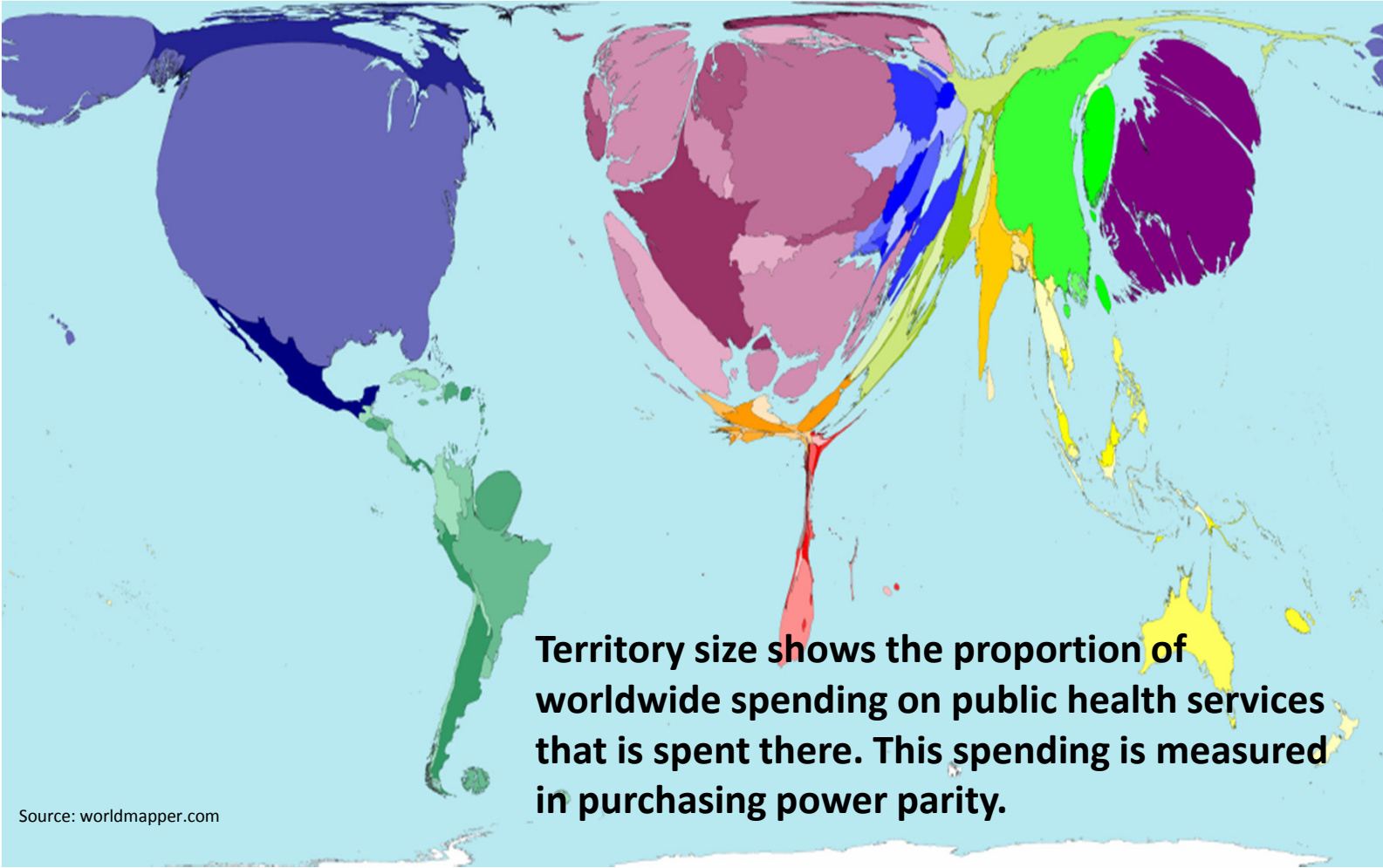
Global Health Industry Strategies

Global Perspectives

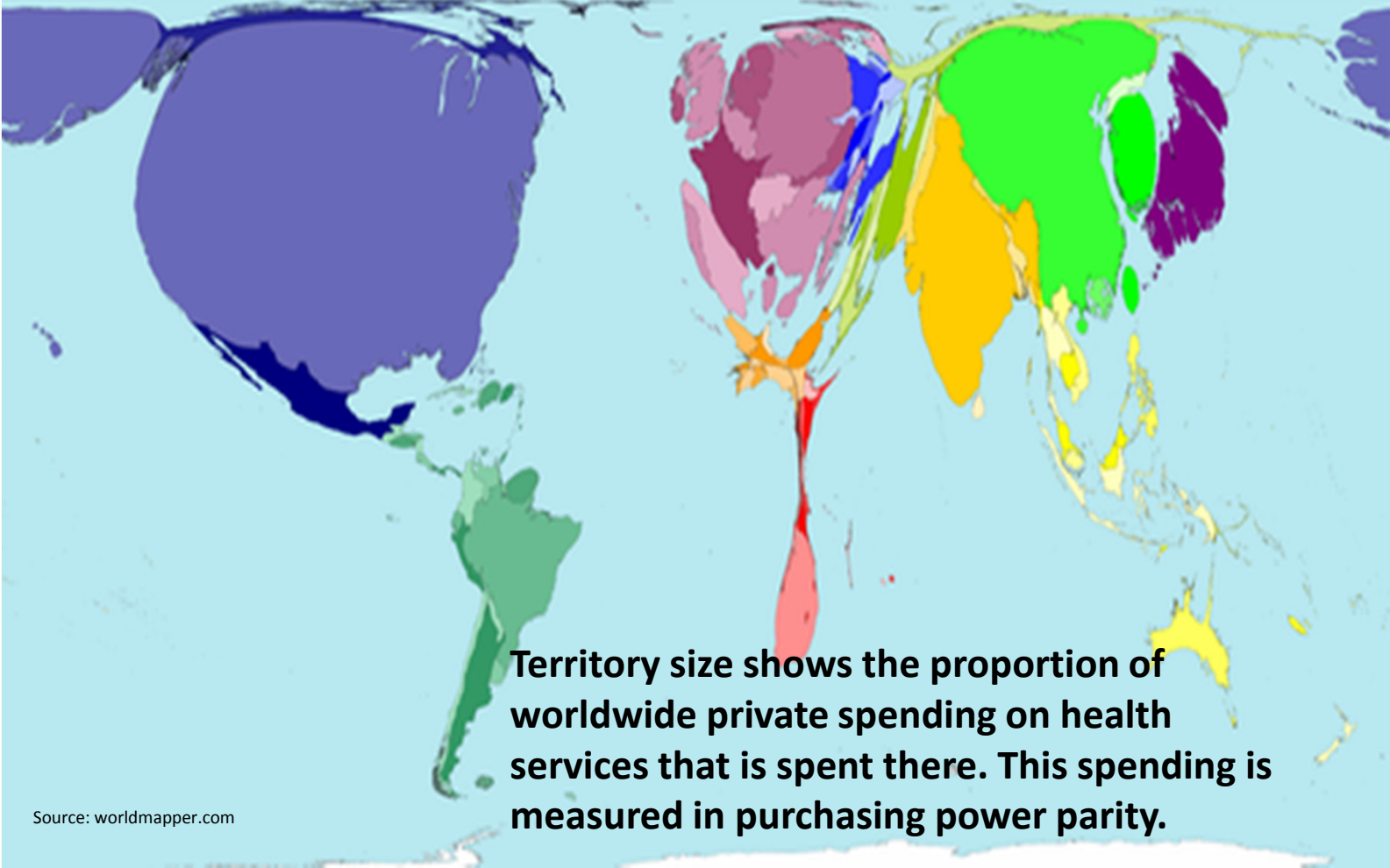


Global Perspectives

Total Public Health Spending

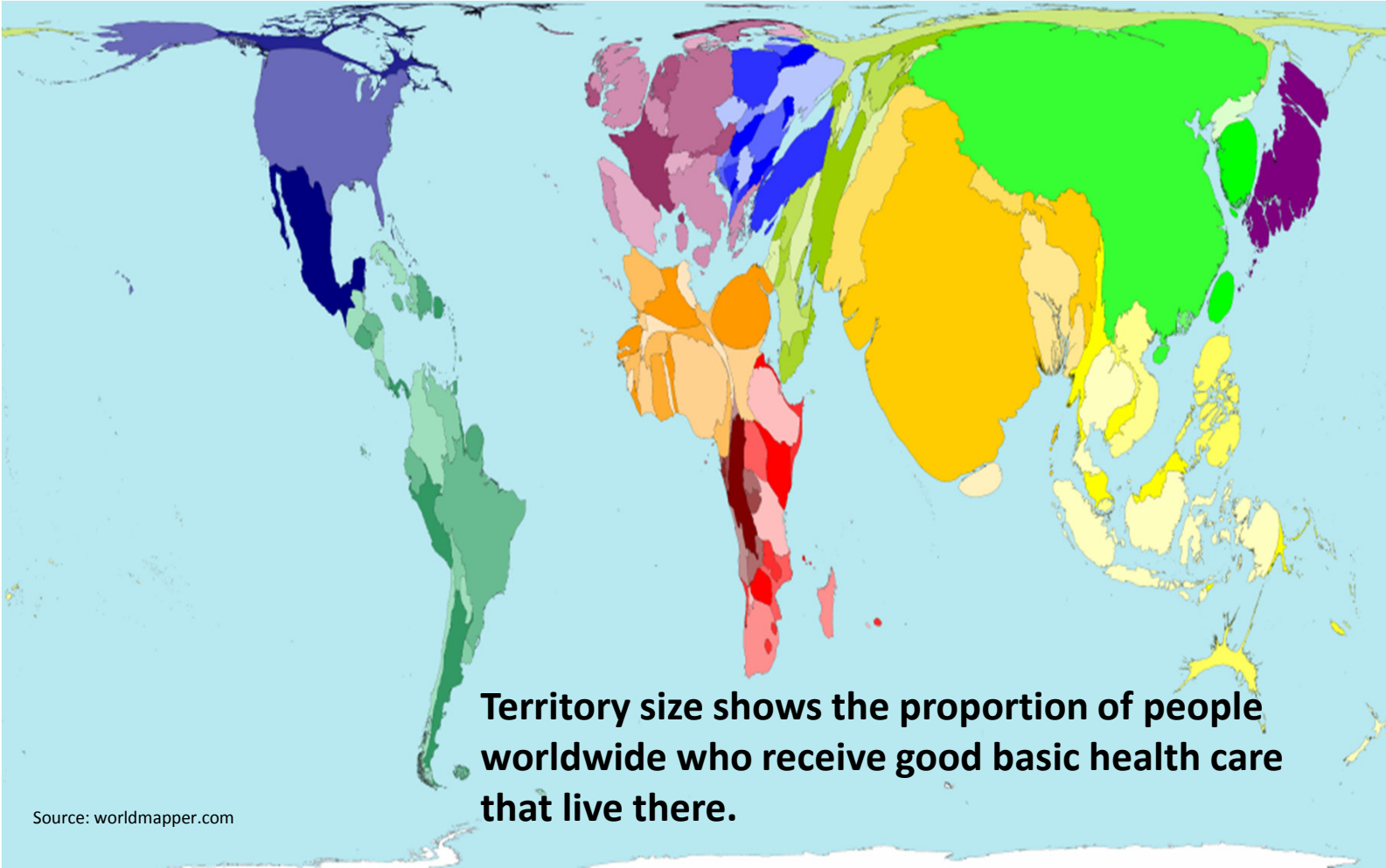


Total Private Health Spending



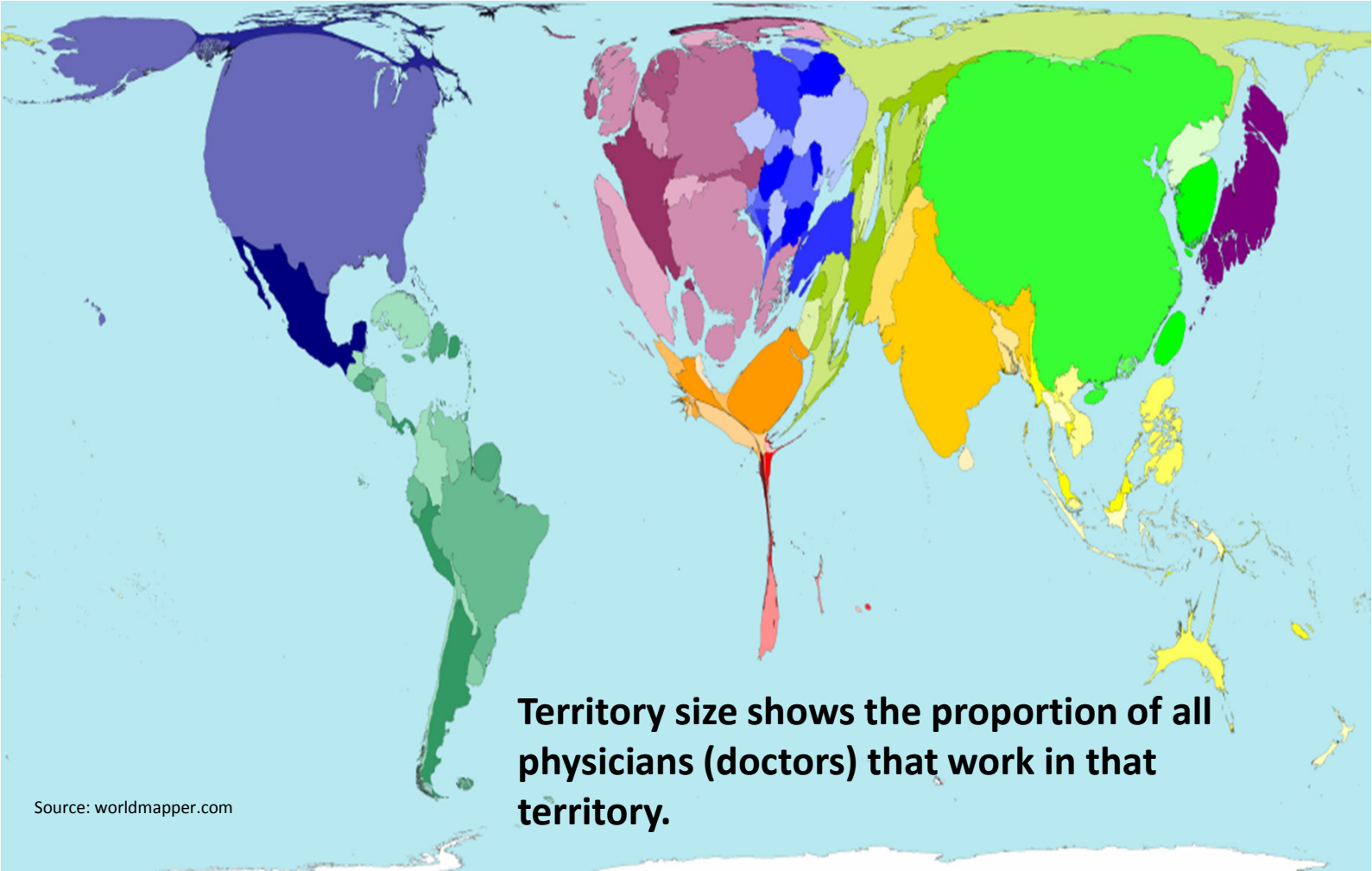
Global Perspectives

Proportion of People Who Receive Good Basic Health Care



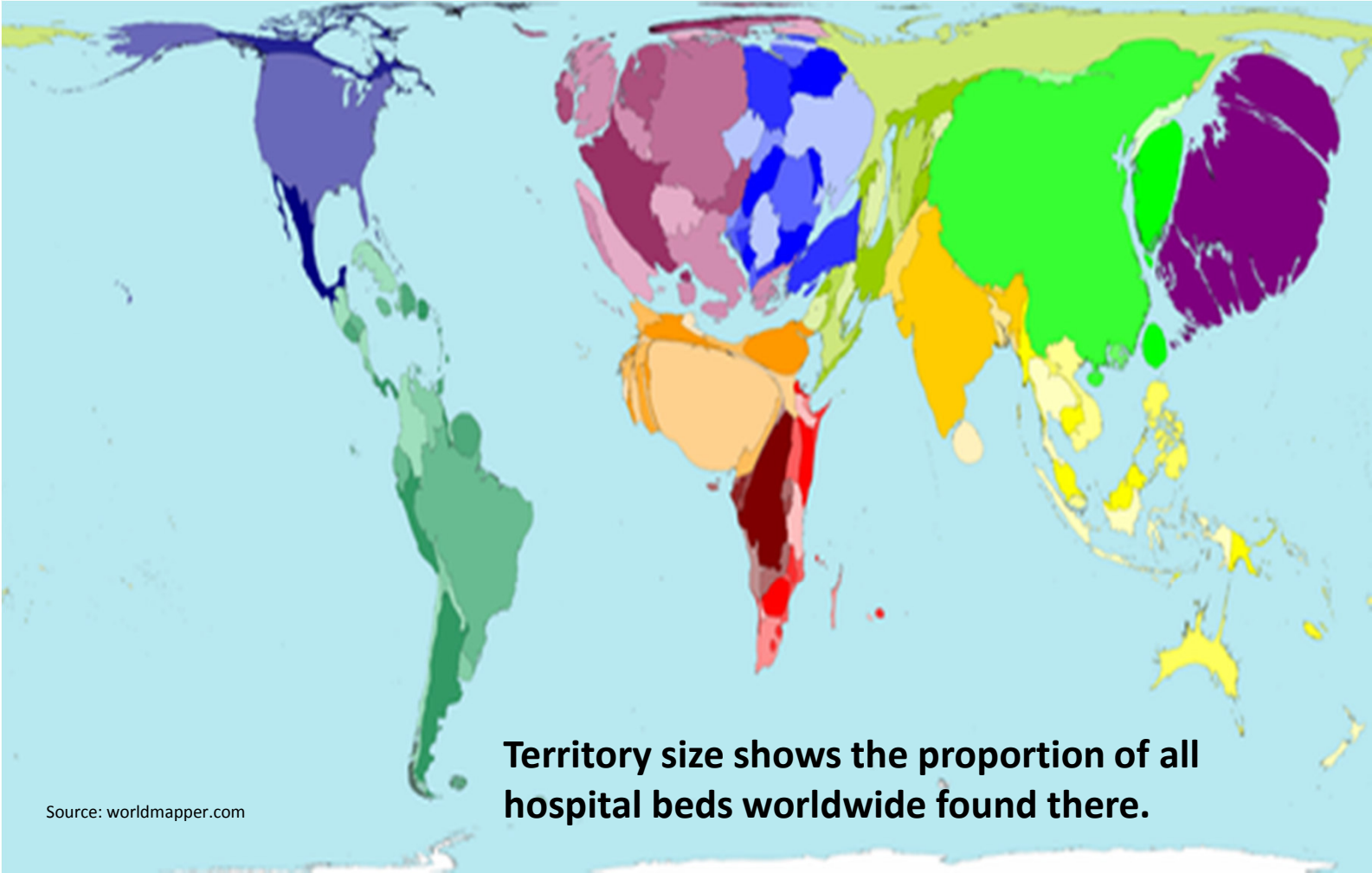
Global Perspectives

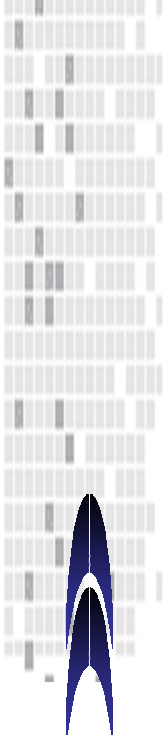
Proportion of Physicians Worldwide



Global Perspectives

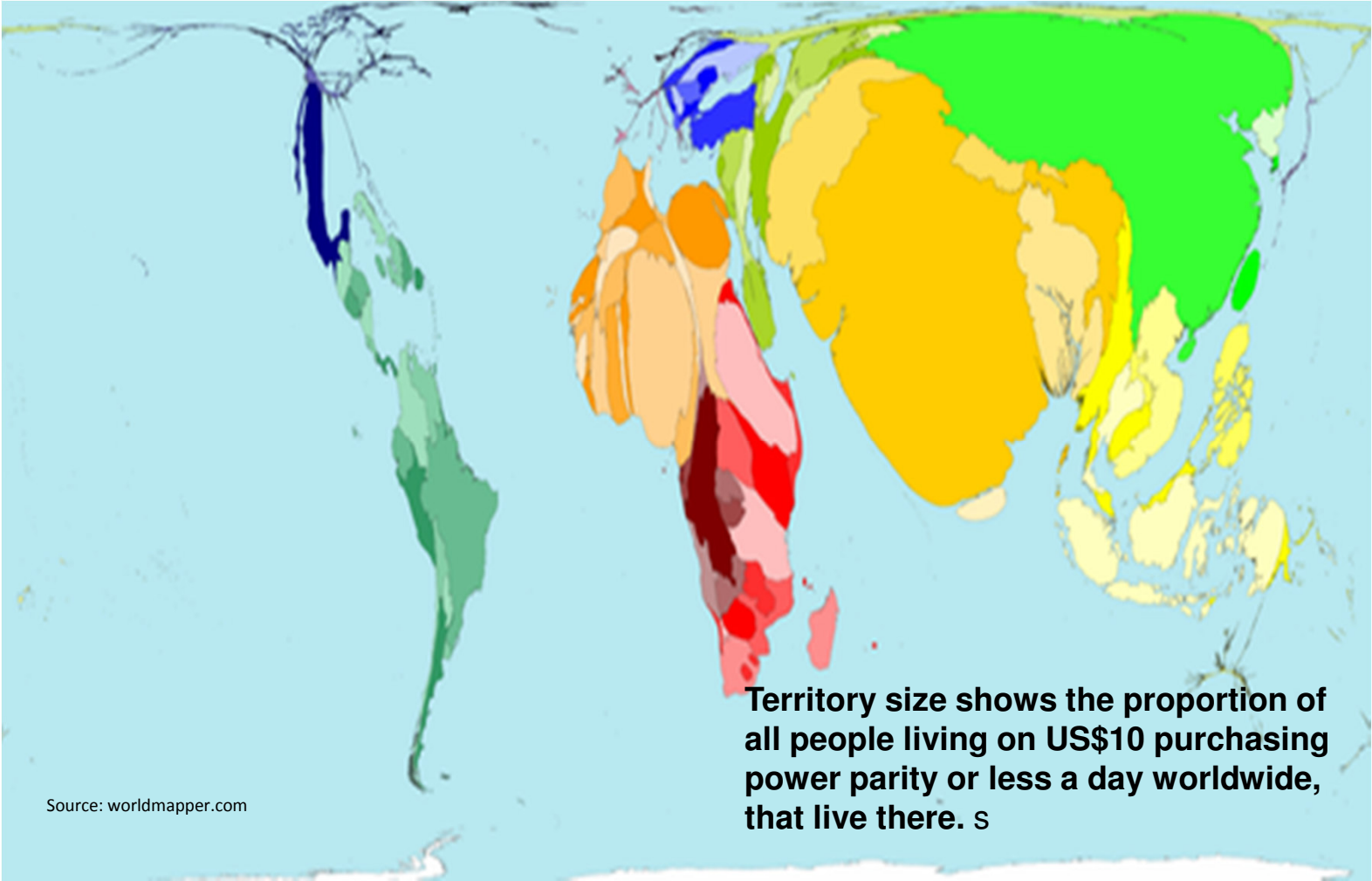
Proportion of Hospital Beds Worldwide





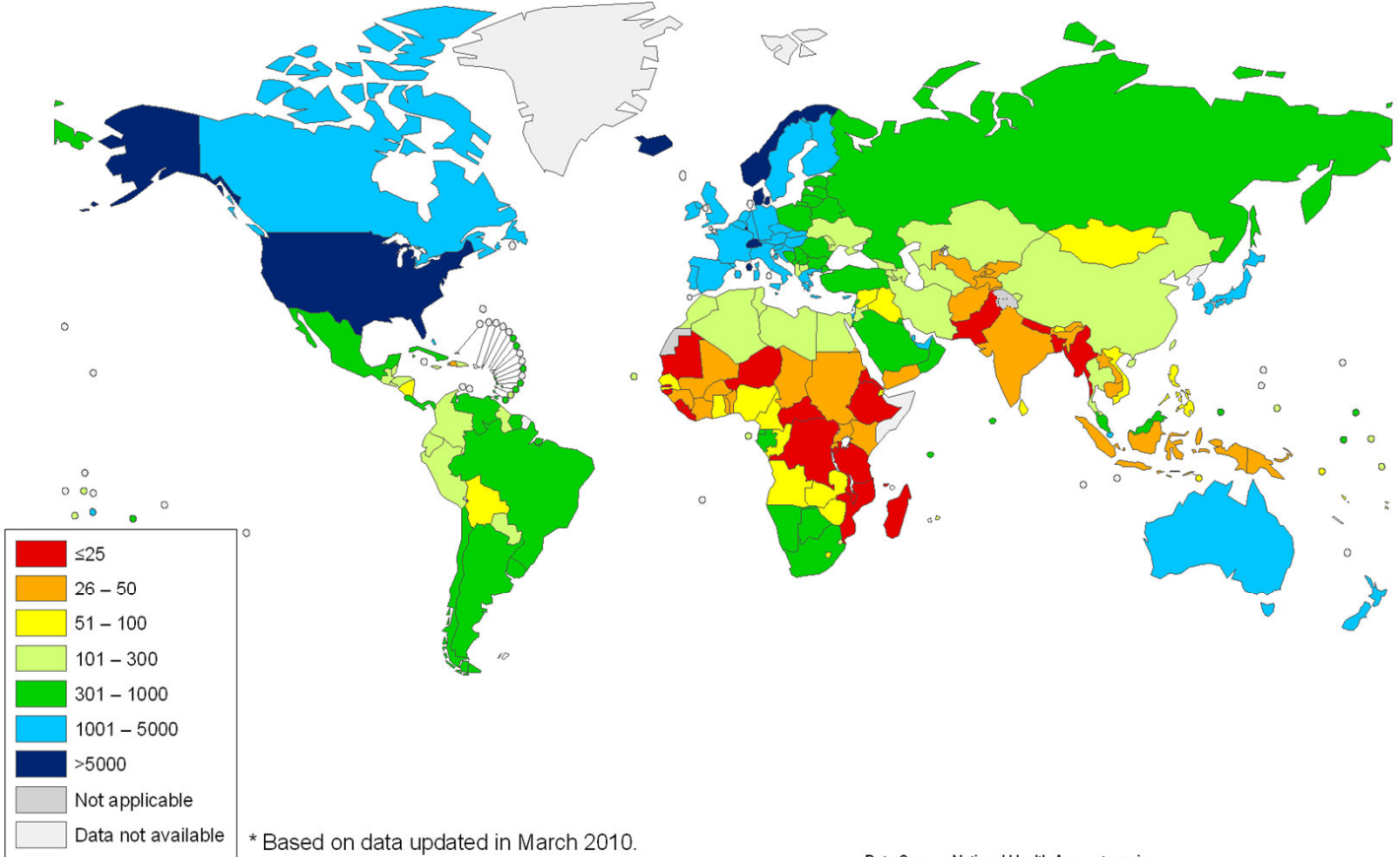
Global Perspectives

People Living on < \$10 per Day



Global Perspectives

Total expenditure on health per capita, 2007 *
(in US\$)



The boundaries and names shown and the designations used on this map do not imply the expression of any opinion whatsoever on the part of the World Health Organization concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries. Dotted lines on maps represent approximate border lines for which there may not yet be full agreement.

Data Source: National Health Accounts series,
World Health Organization
Map Production: Public Health Information
and Geographic Information Systems (GIS)
World Health Organization

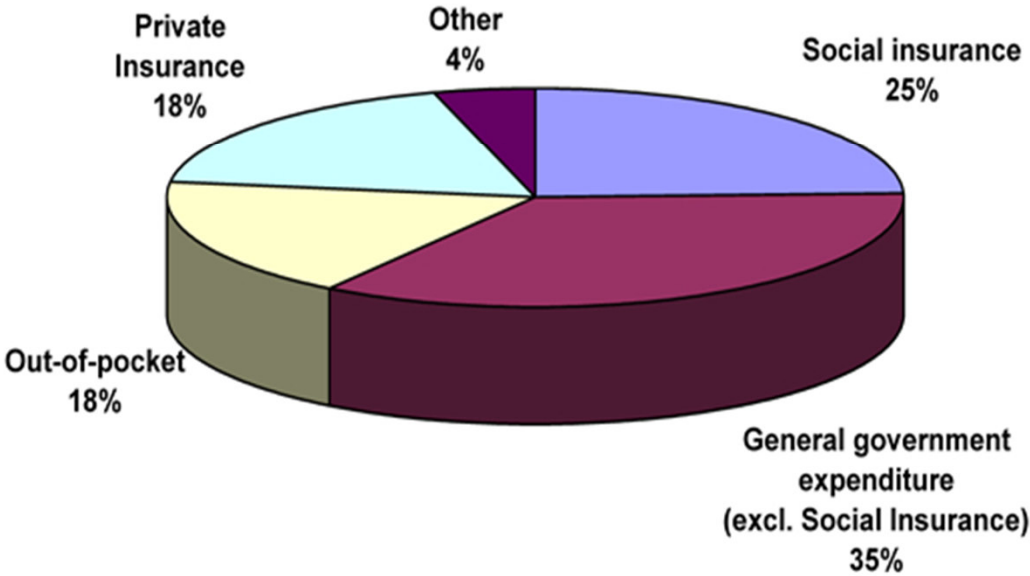


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Global Perspectives

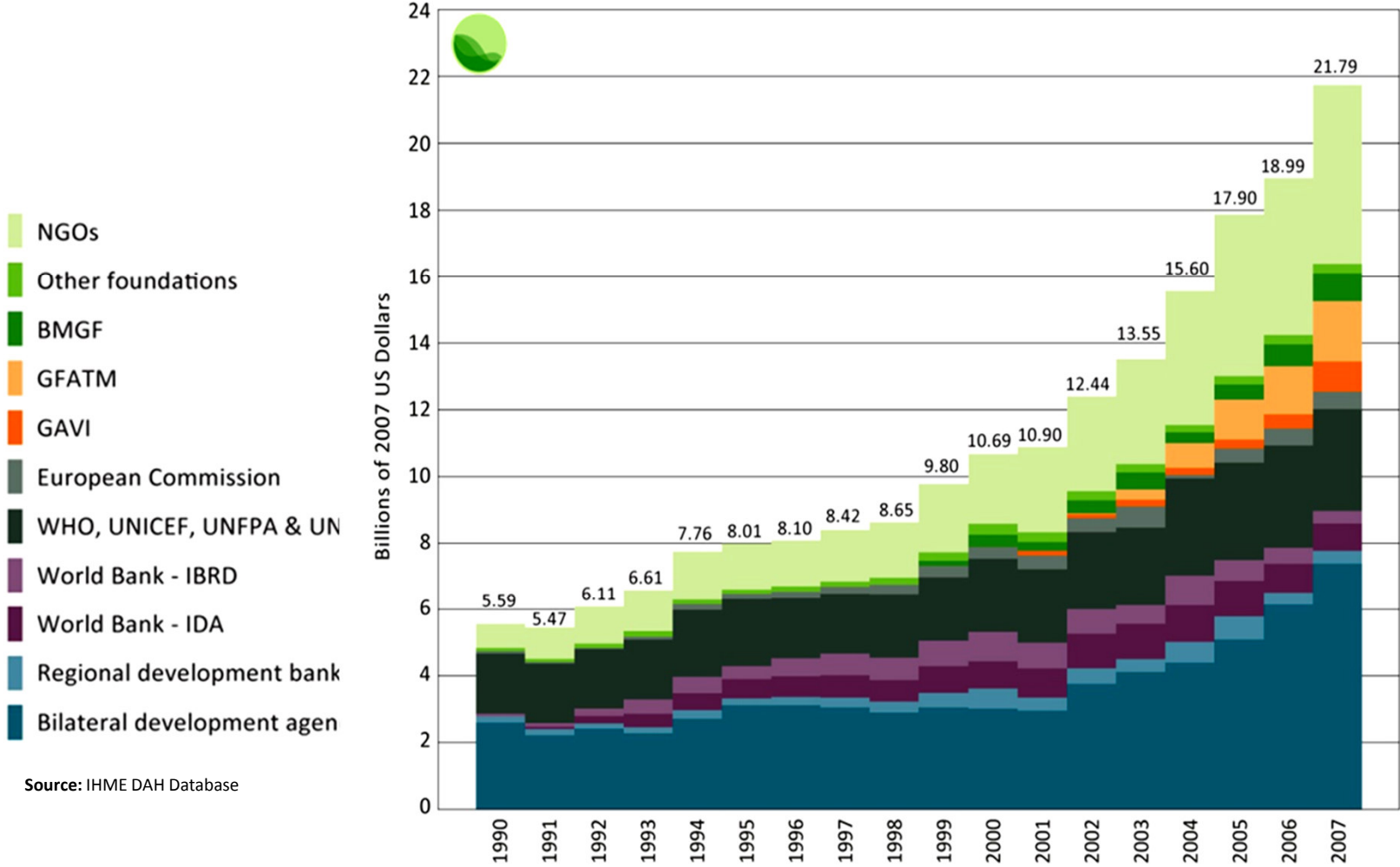
Composition of World health expenditures (World spent US\$5.3 trillion on health in 2007)



Source: World Health Organization



Channels of assistance: New actors DAH from 1990 to 2007 by channel of assistance

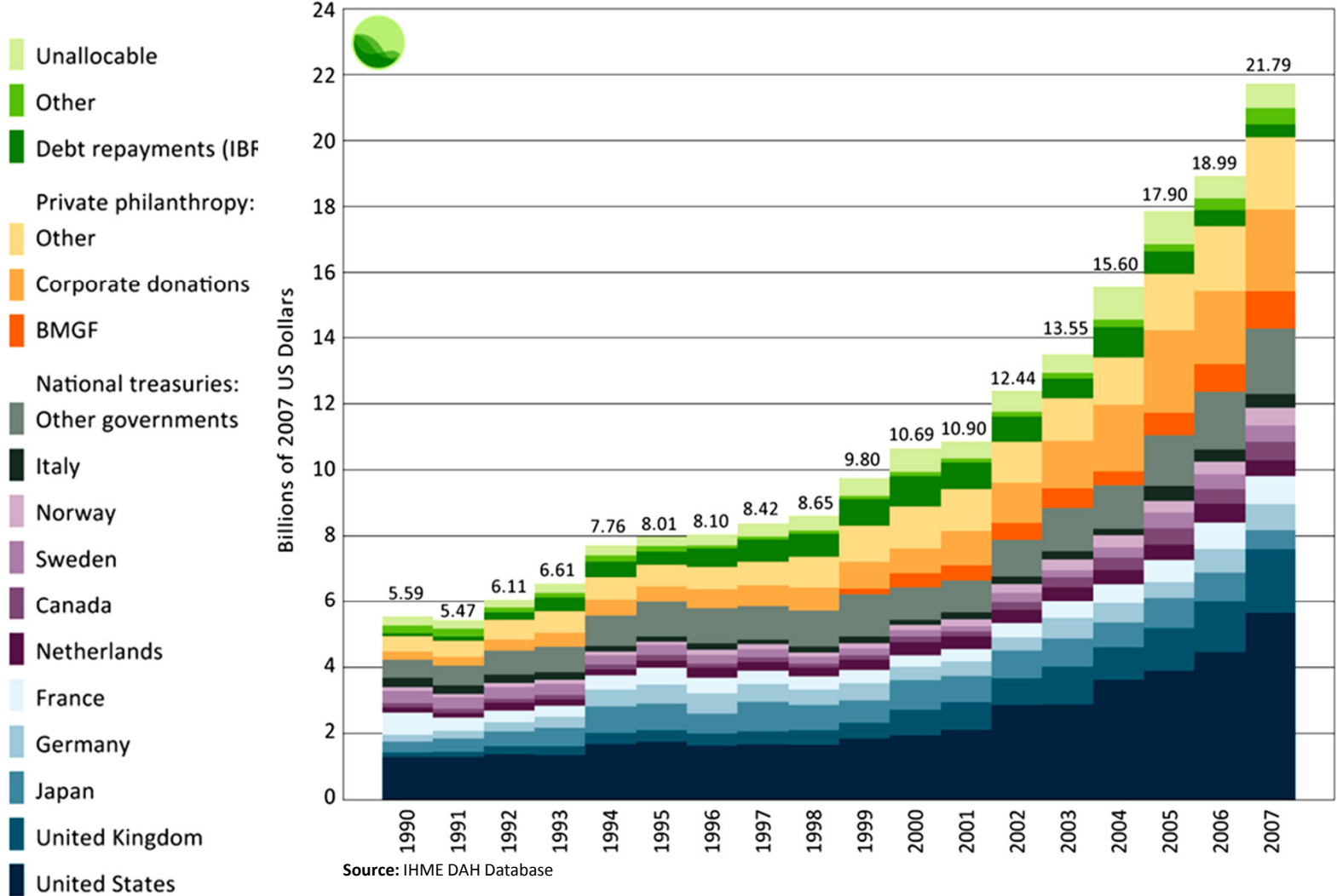


Source: IHME DAH Database



Global Perspectives

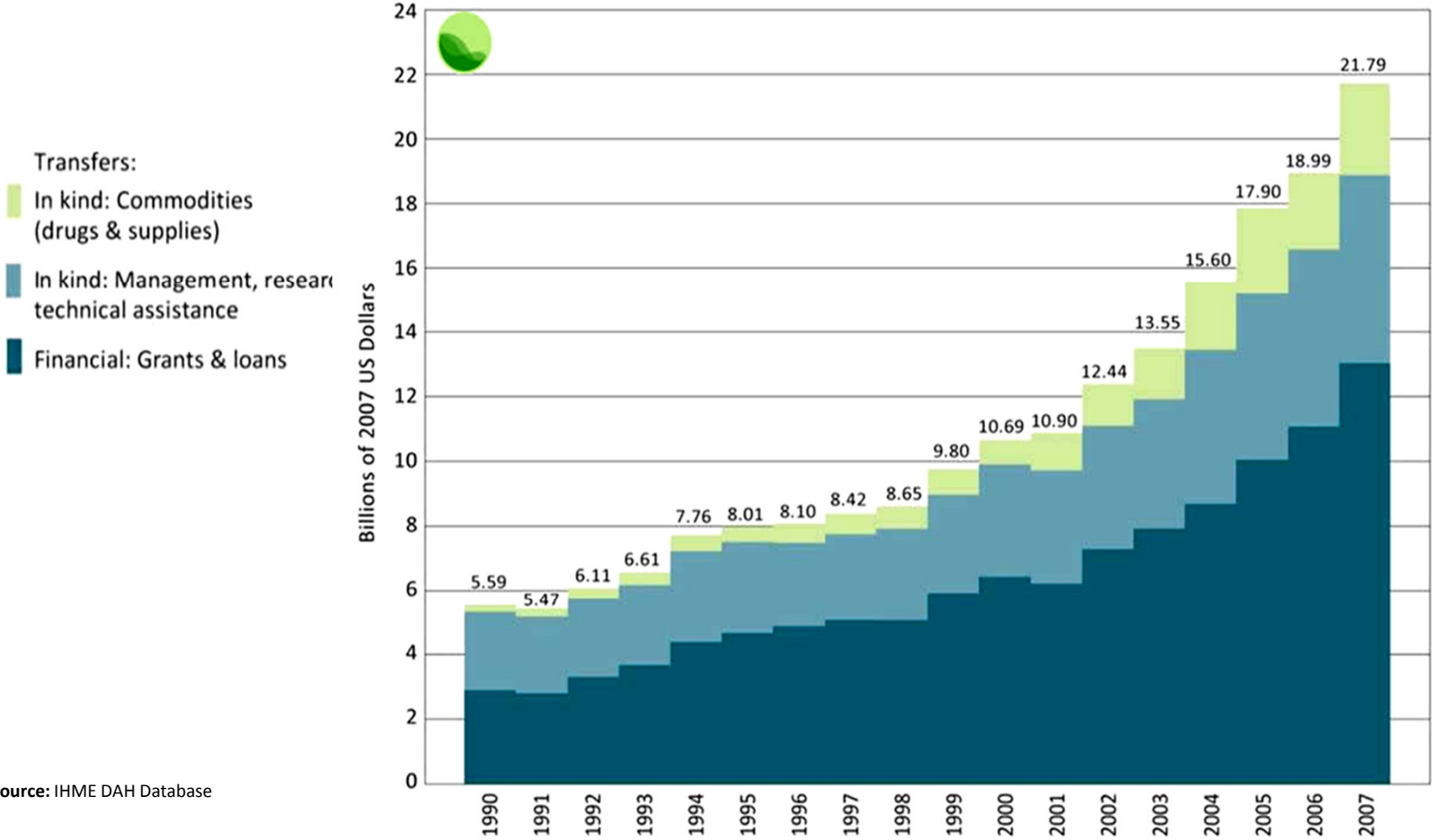
Dramatic growth in DAH from 1990-2007 DAH from 1990 to 2007 by source of funding



Global Perspectives

DAH composed of both monetary and in-kind transfers

DAH from 1990 to 2007 by type of assistance



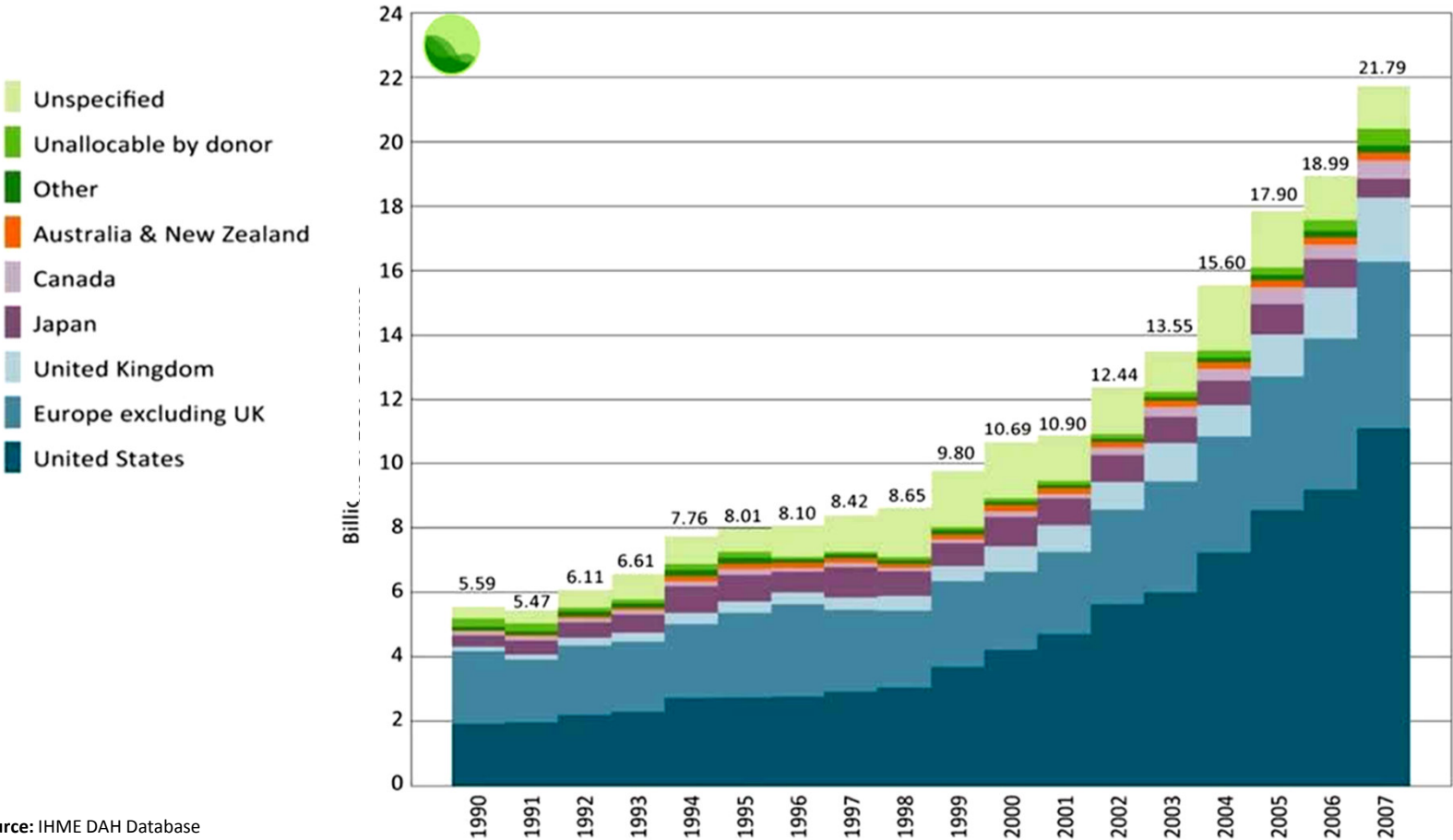
Source: IHME DAH Database



Global Perspectives

US public and private contributions accounts for growing share of total health aid flows

DAH from 1990 to 2007 by country of origin



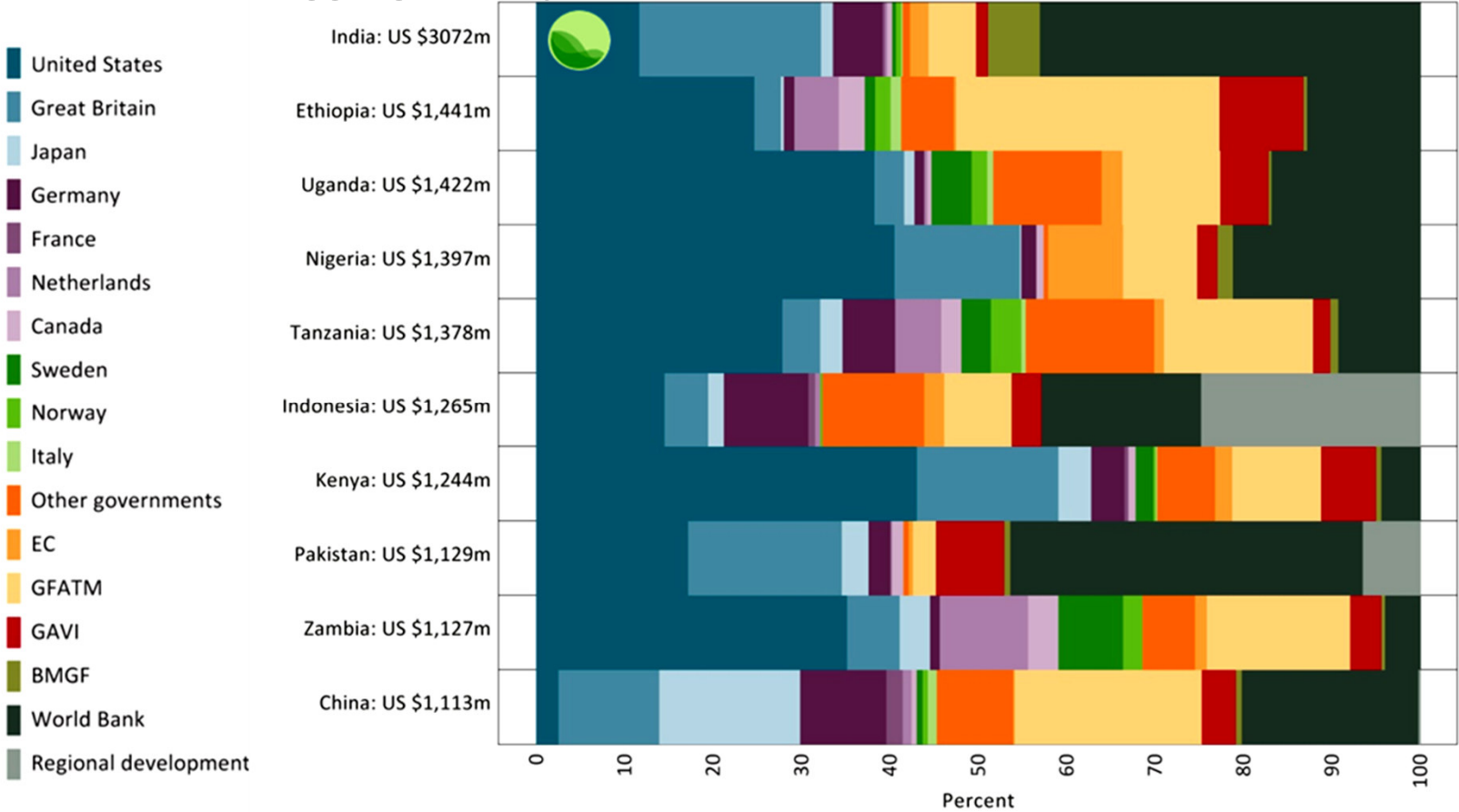
Source: IHME DAH Database



Global Perspectives

Country allocation of DAH appears to be driven by considerations beyond burden of disease

Top 10 recipients of development assistance for health from 2002 to 2007, disaggregated by channel of assistance



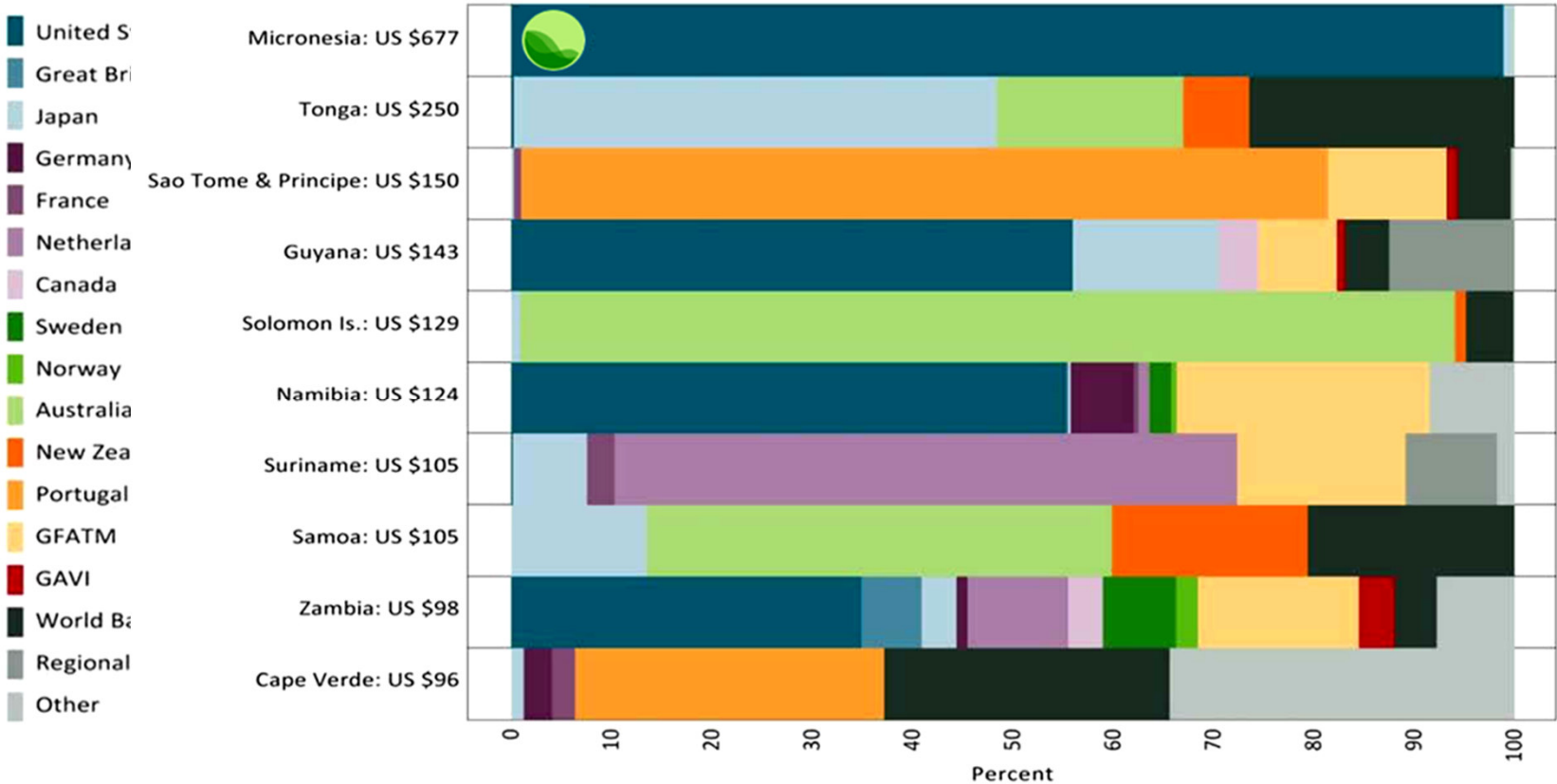
Source: IHME Project Database



Global Perspectives

Geo-political and economic influences DAH as well as donor countries and their ex-colonies and protectorates

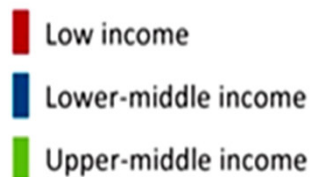
Top 10 countries in terms of per capita development assistance for health from 2002 to 2007, disaggregated by channel of assistance



Source: IHME Project Database and UN World Population Database

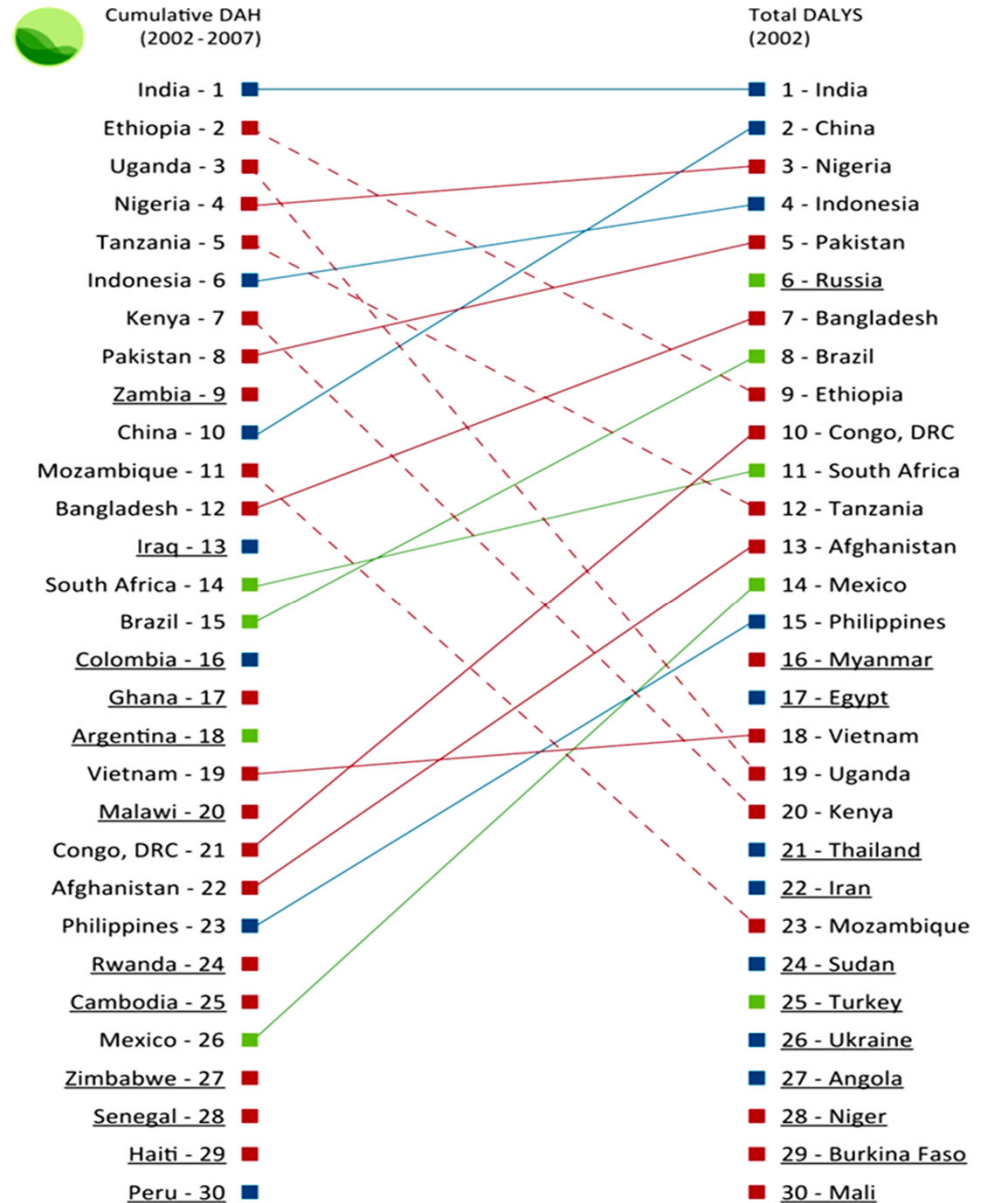


Top 30 country recipients of DAH for health from 2002 to 2007, compared with top 30 countries ranked by all-cause DALYs in 2002



Source: IHME Project Database and WHO Burden of Disease Database

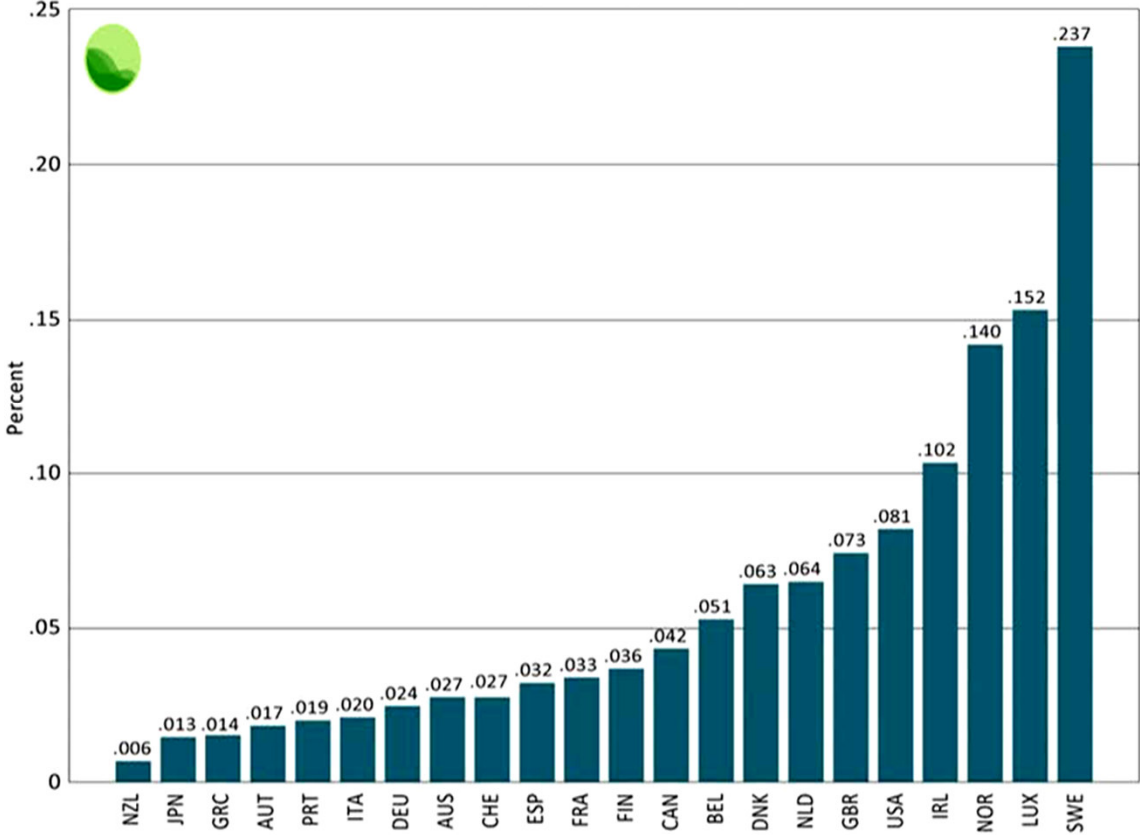
Global Perspectives



Global Perspectives

Sweden, Luxembourg, Norway, and Ireland provide greater shares of national income to DAH than US

Development assistance for health as a % of national income - 2007

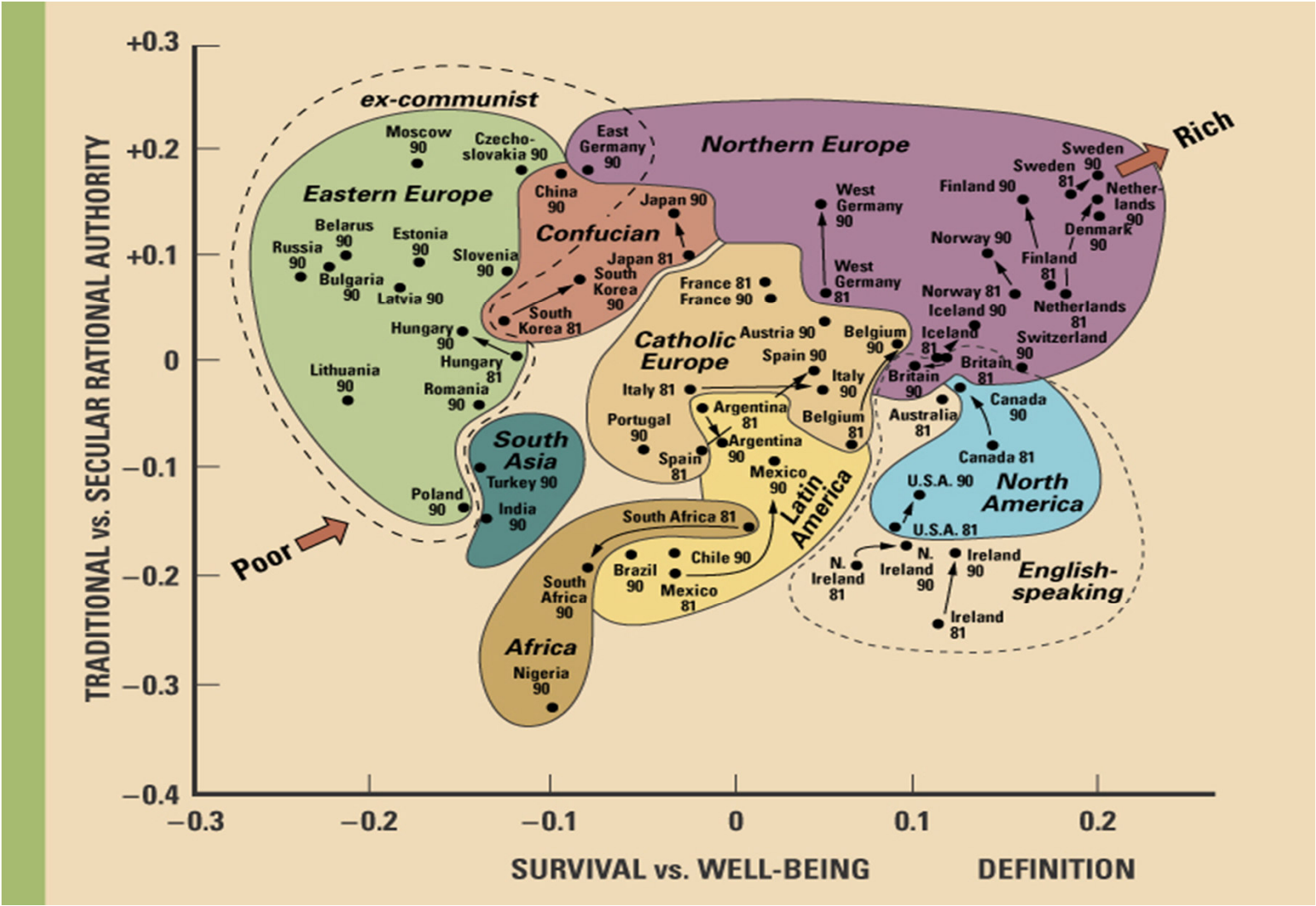


AUS = Australia, AUT = Austria, BEL = Belgium, CAN = Canada, CHE = Switzerland, DEU = Germany, DNK = Denmark, ESP = Spain, FIN = Finland, FRA = France, GBR = United Kingdom, GRC = Greece, IRL = Ireland, ITA = Italy, JPN = Japan, LUX = Luxembourg, NLD = the Netherlands, NOR = Norway, NZL = New Zealand, PRT = Portugal, SWE = Sweden, USA = United States.

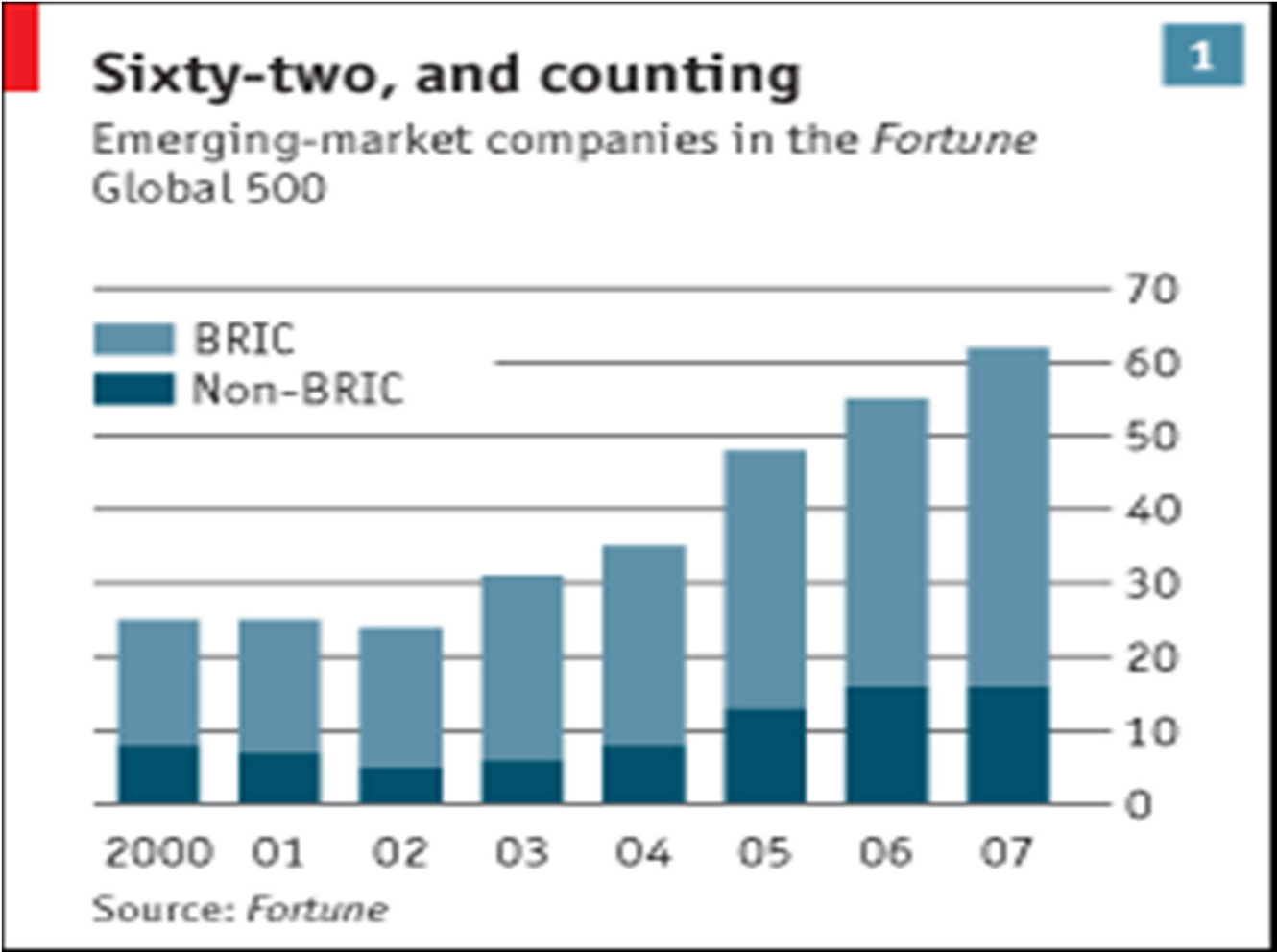
Source: IHME DAH Database and World Bank World Development Indicators

Global Perspectives

Cultural Makes a Difference - Hofstede Research/Mapping



Economic Imperialism is Reversing





Future Challenges - Current Strategies

Health investments in the Structural Funds

Health information and Health Portal

Interactions with WHO

European Centre of Disease prevention
Organe Donation

White paper on Nutrition
Communication on Alcohol
Tobacco control strategy

Health services Initiative

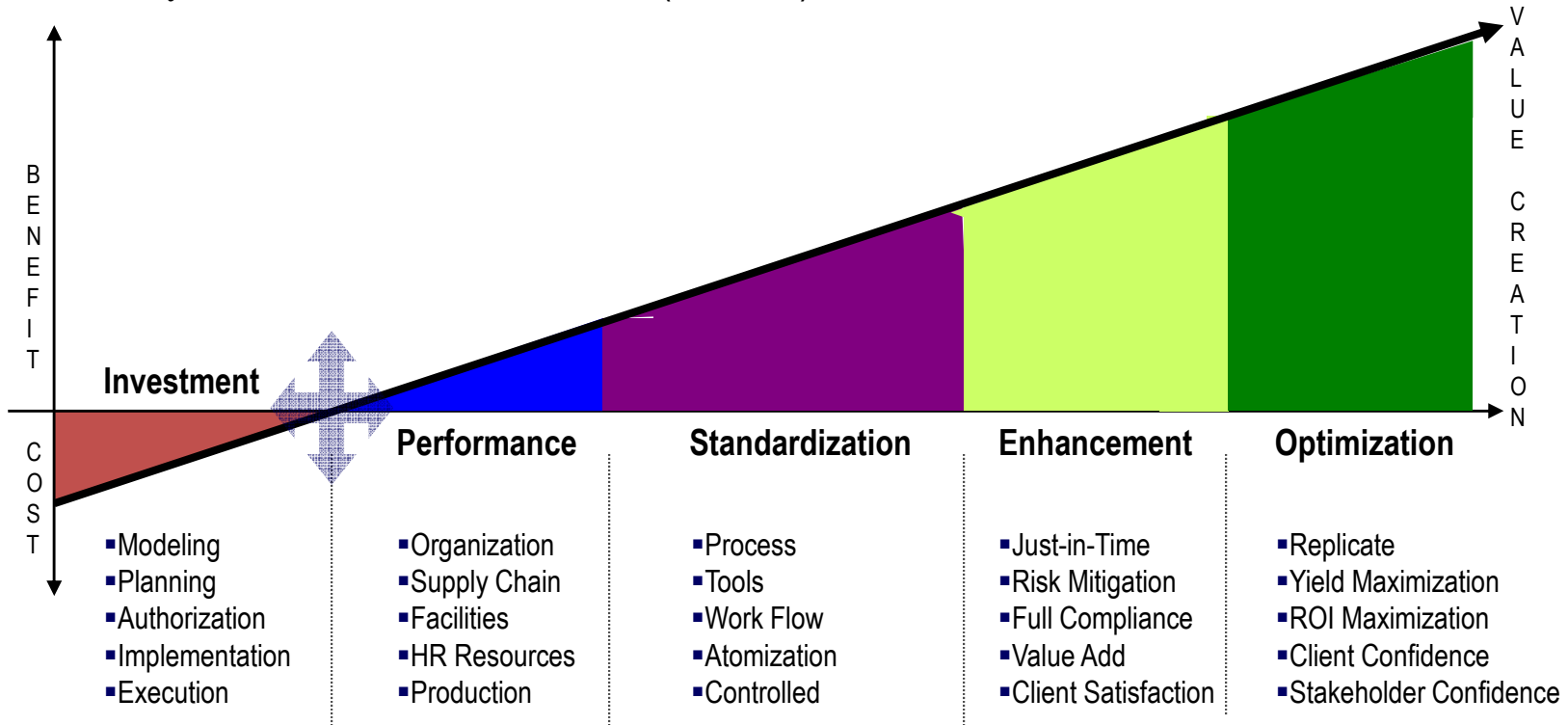
Pharmaceutical Forum

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M.I.M Group Methodology

Lifecycle Plan & Execution Model (LP&EM)



Source: M.I.M GROUP





Global Perspectives

Your thoughts.....?

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