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FRANCE-CHINA :
Innovate Together for Better Health

Collaborating for a Healthier Future in China

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The past two decades in China have been years of tremendous economic expansion and maturity, driving the country to become the 2nd largest economy in the world. However, beneath the traditional economic markers of positive growth lie significant socio-economic and demographic shifts - including massive urbanization, ageing, a growing middle class and associated lifestyle changes - that have intensified the need to develop an effective and efficient healthcare system for the 21st century.

This relationship between socio-economic changes and an increased pressure on healthcare management also illuminates the reality that the challenges China face today will aggravate as the country continues its growth trajectory.

With a similar healthcare infrastructure, a long-standing diplomatic relationship with China, and excellent key health indicators, France is in a unique position to offer relevant experiences and innovative ideas and resources to support China's top healthcare priorities through continuous exchanges and collaborations.

These priorities include:

- developing a **more innovative and patient-centric hospital infrastructure** and health information systems
- caring for a **rapidly growing ageing population**
- preventing and managing **chronic diseases**
- fighting **infectious diseases**

Such collaborations would add valuable input to China's approach to expanding and improving its healthcare infrastructure and therefore its ability to meet the changing healthcare needs of the Chinese people.

A GROWING AND CHANGING SOCIETY



Since 1990, most Chinese people have witnessed almost a complete transformation, not only economically but also socially and technologically. Access to wealth, consumer goods and international travel are but a few of the economic indicators that tell the story of a rapidly maturing society.

This pace of change shows few signs of slowing. Over the course of the next few decades, China is on track to continue experiencing tremendous socio-economic and demographic shifts that will have a significant impact on its healthcare system.



In the next 20 years, approximately **310 million people** are expected to **migrate from rural to urban areas**.



In the next 40 years, the **population aged 60+** will **increase by 8 million people per year**, reaching 454 million by 2050.



The number of **Non-Communicable Diseases (NCD)** – including CVDs¹, COPD², Diabetes, and lung cancer - among Chinese people over the age of 40 will **double or even triple** over the next two decades.

Recognizing such dramatic demographic changes and the resulting healthcare challenges, China has initiated significant reform initiatives with the goal to provide universal, basic and equitable healthcare for all citizens by 2020. However, the system is still under strain today and so China is looking to other best practices around the world to learn more about successful, sustainable solutions that will be applicable at home.

¹ CVDs – Cardiovascular diseases such as myocardial infarction and stroke

² COPD – Chronic obstructive pulmonary disease

PRIORITY 1: DEVELOPING A MORE PATIENT-CENTRIC HOSPITAL INFRASTRUCTURE

Hospitals and Health Information Systems (HIS) are at the core of China's healthcare system, and investing in improvements in these resources is mission-critical to adequately and efficiently care for its people.



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To date, the government has made a series of efforts to ensure that the thousands of new hospitals under construction are proactively addressing issues surrounding the patient experience, clinical outcomes and operational efficiency.

France has also recognized how critical hospitals are to the overall delivery of quality healthcare, and has developed a wide range of hospital development options that could be good references for China, including:

- value-added and sustainable hospital design strategies
- facilities management programs
- patient focused programs



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French architecture companies such as **AIA ASSOCIES**, **ATELIER FRÉDÉRIC ROLLAND** and **CRR ARCHITECTURE** have been at the forefront of hospital design by putting the needs of patients and medical staff at the heart of their approach. These firms have a long experience in China with several landmark projects: Sino-French Yanda Hospital by **ATELIER FRÉDÉRIC ROLLAND**, Shenyang Hospital by **AIA**, etc.

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Several French companies also offer hospital management solutions: **ADEN SERVICES** in facility management to improve efficiency; **LEGRAND** in electrical/digital infrastructure and telecare/telehealth solutions; **AIR LIQUIDE** for medical gases, homecare and hygiene products.

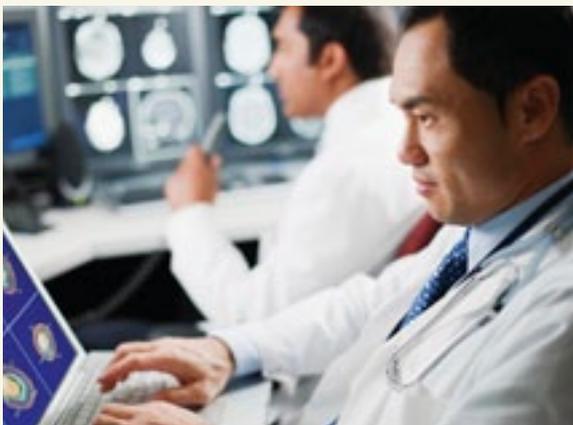
Implemented together or separately, such approaches are proven to improve clinical outcomes, streamline operations and ensure provisions of more cost effective and efficient services – and ultimately a more comfortable and pleasant patient experience.

France also has a very diverse hospital system mixing public, private not-for-profit and private for-profit hospitals. Cooperation between the French public hospitals and China has a long history. Players such as **AP-HP** (the largest public hospital consortium in Europe, bringing together 37 hospitals in the Paris region), **CHU Bordeaux**, **CHU Rouen**, etc have already formed partnerships with Chinese hospitals, offering exchange programs for hospital directors, management training in public health, and best practice sharing on elevating healthcare access in remote areas. New fields of cooperation with private health group, such as **NOALYS** are emerging now.

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With a massive number of patients coming through China's healthcare system, standardized, inter-operable and reliable Health Information System is necessary in order to ensure reporting, record-keeping, data sharing and referrals are all efficiently and accurately managed. Currently, while there are some HIS programs in place, they are usually initiated by individual hospitals or a group of hospitals, and therefore lack any system-wide continuity and scalability.

To address this issue in France, companies have developed numerous innovative software systems and management processes to manage patient records, clinical practices, medical imaging, drug usage, payment and reimbursement processes and financial analysis. Also in place are several secure networking, patient-centric applications and information sharing and hospital performance management solutions that are bringing French healthcare delivery into the 21st century.



The diversity of French e-health companies includes:

- **ETIAM** - provides secure medical networking solutions to healthcare professionals with several ongoing projects in China
- **CAPSULE TECH** - a leading global provider of medical device integration solutions for healthcare organizations
- **THE CAREVOICE** - develops apps to empower patients in selecting healthcare providers

PRIORITY 2: CARING FOR AN AGEING POPULATION

China will soon have the world's largest senior population, generating an unprecedented demand for elderly care services; by 2050, 1 in 3 people in China will be over the age of 60. This demographic shift has been the result of numerous factors, including a baby boom period in the early 60's and 70's, the one-child policy, overall improvements in living conditions, and higher levels of education and access to resources.

To address this issue, the Chinese government has instituted a number of initiatives to provide a framework for healthy ageing, including:

- The development of a "silver industry" in the 12th Five-Year plan.
- The strategy of providing elderly services for 90% of seniors at home, 7% via local community networks and 3% via nursing homes.
- The publication of a law on the Protection of the Rights and Interests of the Elderly.
- The development of home and community care networks for the elderly, to cover 80% of towns and 50% of rural areas by 2015.

However, the system still faces many challenges and solving the supply and demand gap in a sustainable way remains critical in managing a growing elderly population.

With a well-developed "silver industry", France's offerings from both commercial and institutional sectors in elderly home management and home care products and services could serve as informative models for China in managing the issue – and the infrastructure – of ageing.



COLISEE GROUP, ORPEA and **DOMUS VI** are 3 of the leading nursing home operators in Europe. Together with domestic partners, they now develop their activities in China with a focus on highly dependent seniors (Alzheimer's, post-acute care, psychiatric care, etc.). Additionally, **ISRP** is the world leader in the training of care workers in the field of psychomotricity.



One example of a program implementing healthy ageing is a French public private collaboration called "*Health Capital*".

This is an innovative program initiated in 2013 by four public and private players, involving more than 100,000 individuals aged 50+, focusing on proactively understanding and managing healthy ageing and dependence via health capital self-management and primary research into key health indicators.

Current "*Health Capital*" program partners



A major complementary healthcare payer, covering military forces



A leading university of Science, Technology and Health



A global leading provider in data, technology and services for healthcare stakeholders



A specialist in remote support for the elderly, providing practical advices and solutions for day to day life at home

Through the program, participants and providers can leverage a range of web-based tools to input and follow-up on a wide range of health determinants through both self-evaluation and resources such as provider recommendations, education, health services, etc.

By integrating medical, lifestyle and social dimensions into an innovative, comprehensive and holistic approach for health, the "*Health Capital*" program can help develop a better understanding of health levers, push back the age of loss of autonomy, reduce its burden, and empower seniors to remain at home for as long as possible.

PRIORITY 3: PREVENTING AND MANAGING CHRONIC DISEASES

Chronic diseases pose a significant challenge for any country: the patient journey extends across years, rather than months; management requirements change over time; and the need for education often plays a critical role in both prevention and treatment compliance.

Diabetes

Today, China has the world's largest diabetic population, estimated at over 114 million - more than 50% of which has some complications. Such a high prevalence is in large part due to socio-economic and behavioral factors, including urbanization, unhealthy diet and inactive lifestyles.

Cancer

A similar situation can be found in China's cancer population, which has been rapidly growing over the past 30 years. The incidence of cancer in China has increased from 185 per 100,000 people in 1989 to 287 per 100,000 people in 2008.

A rapidly ageing population, lifestyle factors, such as tobacco use, increasing stress and unhealthy diet and environmental pollution, all contribute to rising incidence rates.



Perhaps more than any other challenges, managing these chronic diseases and proactively addressing the full scope of contributing factors requires close collaboration between commercial and institutional stakeholders.

Here, France has the opportunity to bring China the benefit of its comprehensive assets dedicated to innovation and investment in chronic disease management. France is home to some of the world's leading pharmaceutical and health-technology pioneers, particularly in the fields of cancer and diabetes.



DIABETES

Several French SMEs and large companies are at the forefront of innovation against diabetes. They include:

- **IMPETO MEDICAL** - offers patented technologies to screen pre-diabetes patients and monitor complications among diabetic patients
- **SANOFI** - has a global diabetes division dedicated to integrated care (insulin, OADs, injection pens, blood glucose monitoring systems, etc.)

CANCER

- **SANOFI** - a long-established player in China with a strong portfolio of drugs in all segments of oncology
- **IPSEN** - started in China in 1992 and has developed a renowned franchise in uro-oncology among Chinese medical community
- **TRANSGENE** - present in China since 2010, develops in collaboration with Tasly Pharmaceuticals Group new approaches in immunotherapy for the treatment of cancer and chronic diseases with high prevalence in China such as Hepatitis B
- **MEDIAN TECHNOLOGIES** - develops advanced medical imaging software for cancer screening programs and oncology clinical trials and has great ambitions in China in the field of lung cancer
- **NOVACYT** - develops major innovative solutions in the diagnosis of cervical cancer

PRIORITY 4: FIGHTING INFECTIOUS DISEASES

Like chronic diseases, infectious diseases place a significant amount of pressure on healthcare systems. In China, to address issues such as the misuse of antibiotics, and the spread of tuberculosis (TB) in recent years, the government has enacted a number of regulations and programs to address both current challenges, and prevent future burdens.

Antibiotic misuse

The misuse of antibiotics in particular has far-reaching consequences, impacting not only healthcare outcomes, but also creating challenges around physician prescribing compliance.

And the results are severe: The misuse of antibiotics leads to treatment-resistance forms of infections, which carry much higher mortality rates. In fact, the mortality rates from MRSA infections in China surpass those from the AIDS virus. Such outcomes also come at a high price, as the cost to treat an antimicrobial-resistant infection can be double that of standard treatment costs.

Tuberculosis

The prevalence of tuberculosis (TB) is similarly widespread and costly. Rates of the disease are over 8 times higher in China than in France, and there is a significantly high incidence of multiple-drug-resistant TB.

Many of these cases are centered in remote, poorer areas of the country, which lack access to both quality care and sufficient insurance coverage, and carry high mortality rates.

While China's 1991 10-year Infectious and Endemic Disease Control (IEDC) project has increased the cure rate of TB to 95%, addressing these ongoing challenges continues to be a top priority. China has therefore looked to countries with good health indications around these areas for learnings and inspirations.



In fighting infectious diseases, French companies offer a range of innovative solutions that stretch across the patient journey, connecting diagnosis, screening, treatment and surveillance in their portfolio. Such an approach ensures that infections are proactively diagnosed, pathogens rapidly identified and treatments appropriately prescribed and users regularly trained for the best practices in antibiotics usage.



France has a long history of excellence in vaccines, home to a worldwide leader is **SANOPI-PASTEUR**, which offers the broadest available range of vaccines, protecting against 20 infectious diseases.

BIOMERIEUX is a world leader in in-vitro diagnostics and industrial microbiology. With a strong presence in China, **BIOMERIEUX** is a key leader in the fight against the resistance to antibiotics and hospital-acquired infections.

Similar to their approach to elderly care, French solutions also stem from both commercial and institutional sources, delivering a holistic approach to healthcare management that integrates all relevant stakeholders.

From an institutional perspective, organizations such as **INSTITUT PASTEUR, GLOBAL CARE INITIATIVE** (a consortium of five French research institutes focusing on oncology, infectious disease, ophthalmology and neurology) and **INVS** (The French Institute for Public Health Surveillance) have heavily invested in understanding and educating around infectious diseases and related antibiotic resistance and vaccine programs.

Founded in 2004, the **INSTITUT PASTEUR SHANGHAI (IPS)** is the first international institute under the Chinese Academy of Sciences (CAS). IPS works closely with Chinese authorities to address public health challenges (HIV, viral hepatitis B and C, respiratory viruses and virus-induced cancers, etc.).

Activities from these organizations also include public health initiatives that foster strong partnerships between commercial entities and regional infrastructure.

INSIGHTS & RECOMMENDATIONS

As demonstrated, France's world class healthcare system and substantial experience in handling a range of demographic, healthcare and disease challenges could complement China's current healthcare efforts around four key themes:



Providing **integrated end-to-end solutions** across disease management lifecycles, value chains and stakeholder groups.



Delivering **superior quality and safety solutions**, complemented by training and after-sales services for end users.



Driving innovation within China, through cooperation with Chinese companies and scientific institutions alike.



Prioritizing investments in relevant segments of the diverse Chinese market to maximize patient benefits and business impact.

In response to the changing healthcare needs of the Chinese population, China could also benefit from referencing French practices and evolving from within. Such actions could include:



Improving access to innovative products and patient care options, thereby improving both health outcomes and long term costs.



Encouraging more public private partnerships to accelerate uptake of innovative solutions and open more avenues to healthcare funding.

Certainly this exchange of experiences, ideas and resources will be beneficial in driving the transformation necessary for the healthcare system to meet both the changing needs of Chinese patients and current international standards. Such partnership also naturally lays the foundation for future collaborations and creates a positive vision for further Sino-French cooperative development.





This report was prepared by IMS Health China in support of France-China Health Club's participation in the 2014 France-China Health Forum held in Beijing on Aug 15-17, 2014 and future activities in China.

Established in 2013 during the official visit of French President, Francois Hollande to China, the France-China Health Club is a consortium of French healthcare companies set up by the French Ministry of Trade and the French Healthcare Industries and Technologies Strategy Committee. The Club brings together 88 French members active in China (including pharmaceutical, biotechnology, medical technology and e-health companies, hospitals, architects, collective services and training providers, etc.) with an aim to offer competitive and innovative products and services to meet with local China requirements and to develop value added collaborations to advance the development of the healthcare sector in China.

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About IMS Health

IMS Health is a leading worldwide provider of information, services and technology dedicated to making healthcare perform better. With a global technology infrastructure and unique combination of real-world evidence, advanced analytics and proprietary software platforms, we connect knowledge across all aspects of healthcare to help clients improve patient outcomes and operate more efficiently. The company's expert resources draw on data from 100,000 suppliers, and on insights from more than 40 billion healthcare transactions processed annually, to serve more than 5,000 healthcare clients globally. Customers include pharmaceutical, medical device and consumer health manufacturers and distributors, providers, payers, government agencies, policymakers, researchers and the financial community.



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