

Executive Forecast
For Executives by Executives

Mission Health Mexico 2020



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have been managing an unprecedented year.**





NUESTRA INSPIRACIÓN ERES TÚ

El propósito de Pfizer es ofrecer innovaciones que mejoren la vida de los pacientes, innovaciones para que tú vivas tu mejor vida.



MEXICO MISSION HEALTH 2020

“NOTHING IS LOST,
EVERYTHING IS TRANSFORMED”

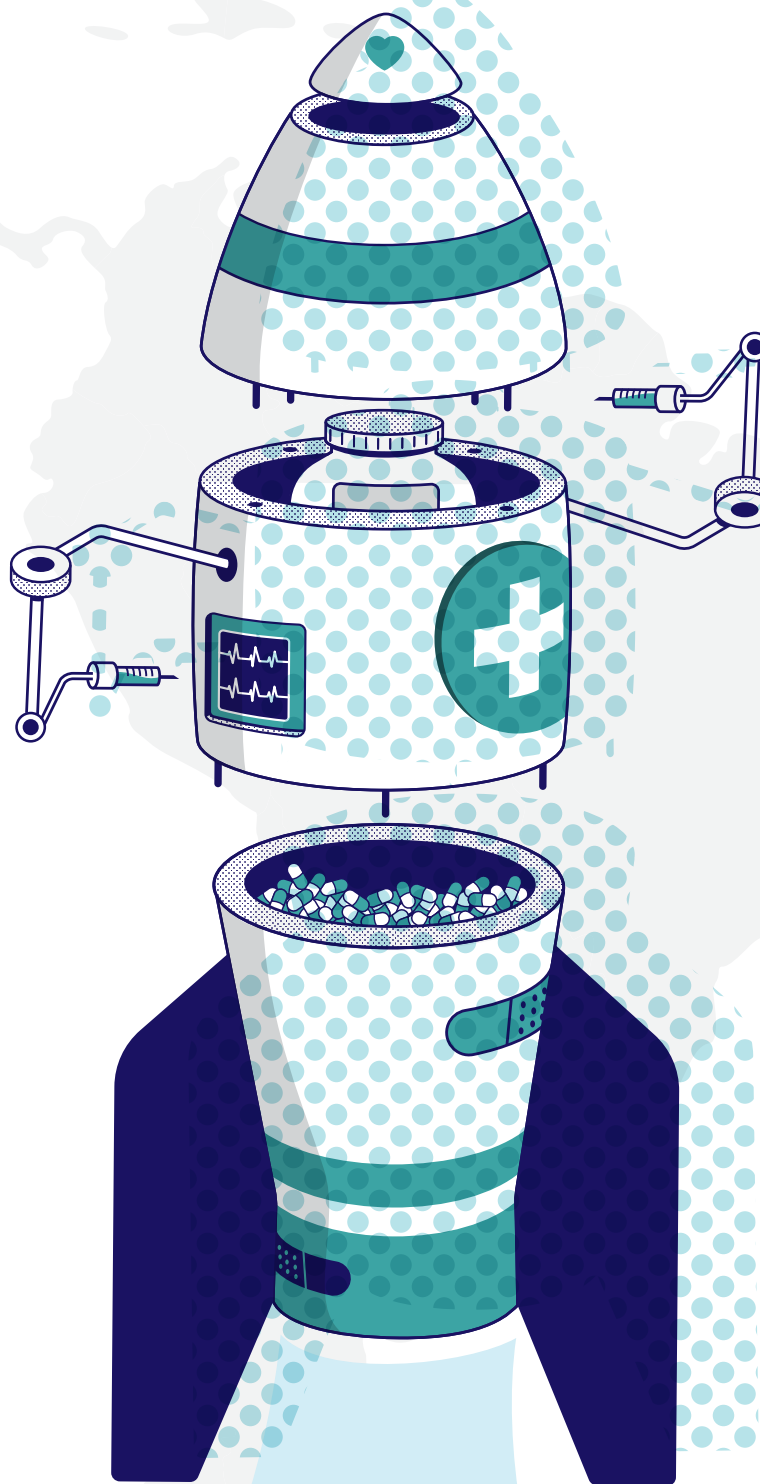
ANTOINE LAVOISIER

“Looking back to the start of 2020, the world has changed almost beyond recognition,” says **Kristalina Georgieva, Managing Director** of the **IMF**. “No country has escaped the health, economic, and social impacts of the COVID-19 crisis. The IMF is projecting global economic activity to decline on a scale not seen since the Great Depression”. As we look back on 2020 in world history, it will be remembered as the “Year of Health”—it is today that we are shaping modern history.

Angel Gurría, Secretary General of the **OECD**, cautions that the economic shock highlights gaps in the resilience of the global economy: “The crisis that is afflicting global health systems, value chains, and financial markets, means a recovery needs to be sustainable.”

Many governments are mobilizing public resources, but even the OECD, in the most optimistic models, expects 2020 FDI flows to fall by more than 30% compared to 2019.

The C-Suite needs to navigate the biggest macroeconomic shock in modern history. No aspect of life will be spared, and everyone will need to re-evaluate their strategies and tactics, challenging how we do business, manage our portfolios, employees, shareholders, families etc. What remains sure is that health must go on, there is an urgent need to learn by doing and MPA—**Master in Pandemic Administration**. The core coursework is as follows: investment; employees and



patient-centricity; diagnostics on the front lines of communicable and non-communicable disease; and the multifaceted interpretation of “Access” and what it means as our companies and our economies are in transition. In a world where travel has largely been replaced by Zoom, firms have seized the opportunity to accelerate the trend of digital as a key global “muscle” for innovation. “Learning is a means of growth. In order to continue growing it is not enough to learn, we also need to learn how to unlearn and find a new way, this makes us stronger. The Pharma industry is shifting, and it is important to stay agile in order to stay ahead.” shares **Omar Lugo Country Lead of UCB Mexico**.

IN ORDER TO CONTINUE GROWING IT IS NOT ENOUGH TO LEARN, WE ALSO NEED TO LEARN HOW TO UNLEARN AND FIND A NEW WAY



OMAR LUGO COUNTRY LEAD OF UCB MÉXICO



HEALTH INVESTMENT MOMENTUM



“There has never been a better moment for the world to understand the value of investment and of innovation,” says **Cristóbal Thompson, Executive Director of AMIIF**, whose association turns 70 this year. “COVID-19 has made healthcare the center and focus on everyone’s life and decisions. The need for systems to continue investing in health is not new. The UN and WHO have been saying for years that each country should spend a dollar per person for preparedness, and having attempted that last year we have seen a cost-effective impact on the economy and we will continue working on that concept.”



Fernando Cruz, Country President of Novartis Mexico, says that in the light of the economic impact of COVID-19, “the dialogue between the industry and the regulatory authorities must be re-established to incentivize investments.” Cruz stresses “When headquarters decide where to place their investments, they’re going to pick the place with the most certainty, the place that benefits the most number of patients.”



Yiannis Mallis, Vice President & General Manager of Novo Nordisk Mexico, agrees that the foundation for restoring confidence is predictability. “When investments are made there is always an element of risk but there also is an element of stability in terms of regulations.” His company, a diabetes specialist in a country where estimates suggest the diabetic and obesogenic disease burden is upwards of 5% of GDP, is committed and willing to accept the risk of its long-term business decisions. “But not all companies are willing to accept uncertainty and lack of predictability when it comes to frameworks such as regulatory, legal or intellectual property rights.”



Tanuj Mehta, former Interim CEO of Pfizer Mexico, affirms that “We need to restore confidence in the stock market and, specifically, in healthcare.” To this point, he says that the proof will be in the products that make a difference—in a more innovative and targeted portfolio on the frontlines of gene therapy and immunotherapy for devastating diseases. “We are reinvesting 15% of global revenues back into R&D, which feeds our huge pipeline that is especially focused on new lines in oncology, rare diseases, and inflammation/immunology.”



Mario Muniz, Director General of IQVIA Mexico, notes that investments will need to be a judicious blend of both private and public sources. In Mexico, Muniz says, “public spending in healthcare currently is a rather low percentage of the GDP. I would like to see a larger portion of the GDP invested in public health.” He adds that Latin America as a whole has high out-of-pocket expenditures, one of the lowest rates of private insurance (around 6 to 7 percent) and that the reality is different for each country.



Rolf Hönger, Head of Latin America Roche Pharmaceuticals. This pandemic will be a big ‘call into action’ on healthcare systems that are not sustainable. The population will demand it and the awareness on the subject will make it easier to get budgets for now. “healthcare into the future. This won’t last for long so we should take advantage of the opportunity.”



Guy Savoie, CEO, Carnot Mexico. Healthcare needs long term investment turnover periods and in the best case scenario tends to take 4 years and real case scenario 7 years for things to come around. Uncertainty creates a lack of investment in long term projects.

First Things First PATIENTS, EMPLOYEES, SECURITY



CEO's are faced with constant trade-offs; but how to manage scarce resources in times of Covid-19?

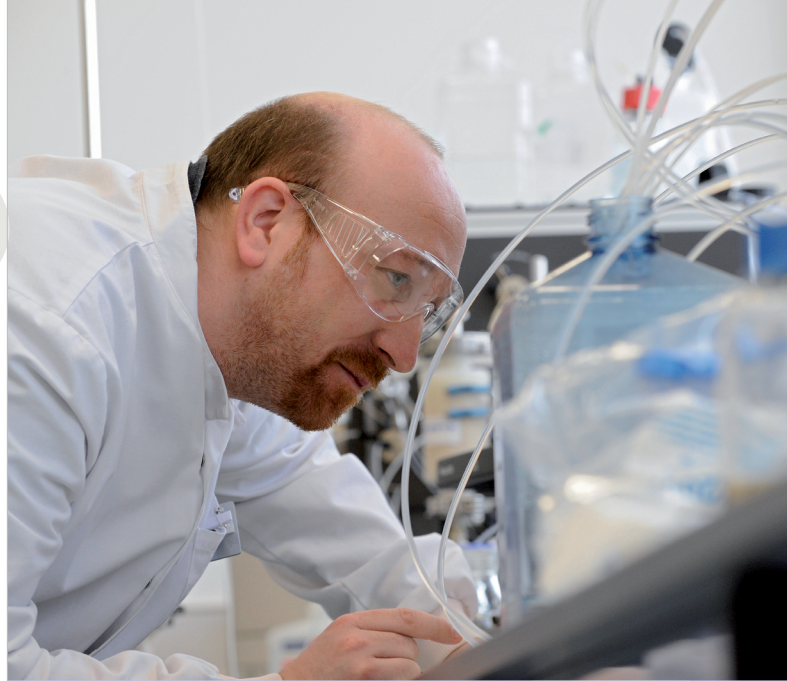
"This is one of my biggest challenges," says **Omar Lugo**, Country Lead for UCB. "To create conditions for every single one of our team members to work collaboratively, succeed on their jobs and remain motivated. Leading by example is the best way to manage a team: Las palabras mueven, pero el ejemplo arrastra. We invest in people because it is the only sustainable differentiator in the future and in medicine."

Lugo stresses the need to consider diversity within the company. "And not only gender diversity, but also generational diversity," he says, hoping for a mix of wisdom and experience that can mutually benefit both older and younger workers.

Juan José Aguirre, Director of Grupo Bruluart, is at the front lines of securing the supply and continuity of medical products throughout Mexico's near two million square kilometers—and during the pandemic, he's resorted to unconventional, and sometimes abandoned, approaches. "The first of our challenges were the APIs as they are at the beginning of the chain, and we solved that by going back to doing business with brokers, something we had been moving away from because we get better prices and conditions going direct to manufacturers," he says. "To ensure the security of supply in the rest of the chain we worked on logistics creating new protocols for security, making sure we never stopped working. On the administration side, we had people coming to the office on different schedules, marketing on Mondays, sales on Tuesday, etc., and those who could do home office. In operations however we needed all our employees, so we organized a special schedule. After all, this is over we might use the new system, like for example having some employees working at night leaving everything set up for the employees coming in in the morning, which would improve our efficiencies, fuel consumption, electricity and so forth.

For Aguirre, it's not business as usual, but he notes that his KPI's "hardly shifted at all. Our company objectives are very much fixed although maybe a few indicators might have shifted, like not pushing a couple of products with profitability margins due to the pandemic." Instead, Aguirre has pivoted, as required, to products like face masks. "We have sold about 30 or 40 thousand, which are low-profit articles, but we are willing to keep it that way. Instead of selling antibiotics, we sell face masks or plastic cover sheets, which we have never sold before."

"Pharma chemicals and the security of supply has been an important issue forever but has now been made more visible with the COVID-19," says **Guy Savoie**, CEO of Carnot Mexico. "In Mexico above 90% of the APIs are imported, whereas in the 1980's about 80% of the raw materials were manufactured locally. This has not just happened in Mexico, it's a global phenomenon moving toward China and India—China mostly, as even India imports from China." Savoie echoes Aguirre on his security concerns, and expands the focus to a regional perspective, including both Mexico and the US,



UCB es una compañía **Bio-Farmacéutica global** enfocada en crear valor para las personas que viven con padecimientos severos en las áreas de inmunología y neurología.

Trabajamos todos los días para atender las necesidades de nuestros pacientes y sus cuidadores, ayudándoles a lograr sus metas en materia de salud y vivir la vida que ellos desean. UCB recorre el camino correcto para convertirse en la Bio-Farmacéutica preferida por los pacientes y profesionales de la salud al ofrecerles medicamentos y soluciones que mejoran sus vidas.

as the US imports about 94% of their APIs. “Being so close to the US is for us an opportunity as is local consumption,” Savoie says. “I am not suggesting we compete with China in this area but we do need to figure out the critical APIs which will be most important in the future so we can have a strategy to work toward that.”

Tanuj Mehta, former Interim CEO of **Pfizer Mexico**, says the company has released a 5-point plan “which includes giving access to our data, our medicine, our expertise and leading scientists.” Mexico is one of Latin America’s most important affiliates, both in terms of commercial offices and production plants, and has a lot of experience with vaccines. At the time of the meeting, Mehta shared “We are working with a company called BioNtech to co-develop a potential coronavirus vaccine which could help to prevent the spread of COVID-19. It’s very exciting and Pfizer is committed globally, and in Mexico, to fighting this disease.”

DIAGNOSTICS: THE NEW FRONT LINE



In every country there is a careful balance between the treatment of communicable and non-communicable diseases—a balance that has shifted drastically in the past months, away from chronic diseases like cancer, heart disease, and diabetes. But what will happen in 2021, when medical systems have to play catch-up, and how will companies step up to address those other diseases that have fallen behind?

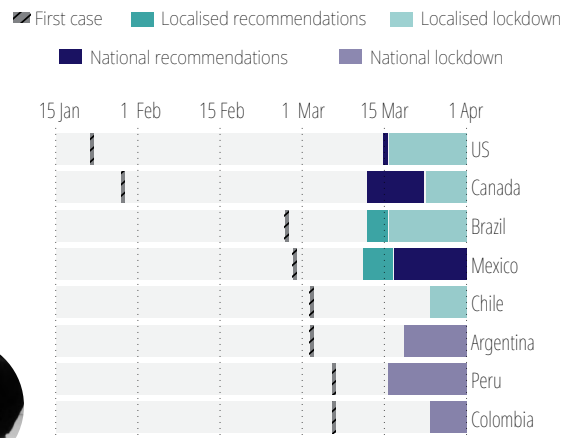
“To be prepared is fundamental,” says **Dr. Roberto Tapia**, **Director General** of the **Carlos Slim Foundation**. “We have already learned lessons in the past from influenza, from SARS in 2003 as well as other diseases, and to a certain extent we have generated preparedness within that context. Preparedness requires information systems. Preparedness has many frameworks.”

“We have to be more integrated and create more data,” says **Cristóbal Thompson**, **Executive Director** of **AMIIF**. Thompson believes that the healthcare sector will have to embrace cross-sector learnings—maybe from airlines or hotels which have been deeply affected by the sudden downturn in travel. “The data we have in Mexico is very fragmented and we need local and global data as it is critical to artificial intelligence and innovation,” he continues, adding that his industry group, typically associated with research-based pharmaceutical companies, changed its status last year to include innovative medical technologists like **Medtronic**, **Johnson & Johnson Medical**, **Siemens**, and **Fischer**, to create a space to become a bridge to the future. “We need to prepare and build for what is coming,” Thompson says.

Alejandro Paolini, **GM** of **Siemens Healthineers Mexico**, **Central America**, and **the Caribbean**, hopes that among all the downsides surrounding the pandemic, one upside may be the further recognition of the importance of early detection. “Diagnostics play a crucial role in healthcare,” Paolini says, “however it doesn’t work alone. Especial-

Countries in the Americas in lockdown

Dates and severity of restricted internal movement by country



Source: Oxford COVID-19 Government Response Tracker, & BBC Research published on bbc.com

ly nowadays, where healthcare systems are facing unprecedented challenges. Our focus is to help healthcare professionals deliver high-value care to patients in the whole disease chain: diagnosis, prognosis, therapy and follow up.” The company’s portfolio of imaging solutions—CT and MRI scanners, X-ray systems and ultrasounds—contribute to “walk the talk” for Paolini’s long-time advocacy toward patient centricity, alongside their progress to approve new clinical tests for COVID-19 that will help front-line professionals.



“I believe that after this pandemic, the importance of a timely diagnosis will be specially highlighted,” Paolini says. “Definitely, the cultural mindset will change regarding early diagnoses for the benefit of the patients. We are applying AI to CT images for detection of COVID-19 symptoms and to help with follow-up and treatment planning. Our digital health solutions are also supporting healthcare providers in protecting front-line workers and increasing healthcare delivery capacity.” He cites digital services enabling medical personnel to operate systems regardless of their location and thus with a potentially lower risk of infection. “These solutions and many others are being tested around the world and I hope to bring them soon for Mexico,” Paolini concludes. “The focus of our long-term vision is to continue to grow in existing markets, enter adjacent fields, and conquer new markets. As an example, last year we completed the acquisition of Corindus, one of the leading companies that offer a robotic treatment platform for major vascular therapeutic markets.”



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<https://latam.gehealthcare.com/>

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ACCESS, A COLLECTIVE DEFINITION

"Access" is one of those words that can mean everything and nothing all at once. In the spirit of clarity, the top healthcare leaders weighed in on one simple question: How would you define "access"?



Rolf Hönger, Head of Latin America, Roche Pharmaceuticals: "Working within the existing system to generate better results. But the real changes come through correct policies, where we work on how to change health, and the way we operate health so instead of expanding the range from 200 to 300 out of 1,000, we should discuss finding the other 700 patients, and this is the most useful discussion and a long term horizon. Roche is a cofounder supporting the initiative of what we call "Movimiento Salud 2020", of which I am a board member – where we actually look at systemic issues, not so much at what we call access issues. There is a huge difference between access issues and health issues."



Omar Lugo, Country Lead, UCB: "Connecting the correct patient with the right solution at the right time. Our biggest challenge is how to deliver the asset or the solution to the patients. I think that in order to increase access, it might be worth reviewing the law that describes procurement processes. We have worked with other procurement models in Latin America where they have weighted variables, in order to procure better."



Mauricio Guizar, General Manager, Ipsen Mexico: "We must bring products that have a very real value to our payers who have a limited budget and very real needs. We have to understand the patients and link this with an economic proposal that can be attractive for them. Our work is mainly engaging the physicians with the product, working with payers in terms of economic proposals based on product efficacy and a cost-effective proposal, as well as offering products on diseases that have not been treated in the past."



Nicolás Linares, Executive Director & General Manager at Ultragenyx: "Every country has a different pathway for access. In our therapeutic areas, it is about our excellent treatments and management of patients in the long term, providing value to the system. The discussion is complicated as

orphan drugs tend to have higher prices than standard drugs but we try and get the best treatment or patient management possible via the government's possibilities and allocation of resources."



Sandra Cifuentes, Latam Area Lead, Astellas: "The concept of access means working together with all the stakeholders, achieving the expected healthcare outcomes for the patients in a sustainable way for the healthcare system, and at the time achieving a responsible and sustainable growth for the organization."



Ramon Acevedo, General Manager, GE Healthcare: "The different ways government authorities and healthcare providers supply healthcare services to the population. Depending on the health policy established by the government there are different ways of doing this; we must adapt our portfolios of solutions to the new healthcare policies created for servicing the population in general. We invest close to 5% of revenue in new technologies, on new ways to work and new market trends."



Piero Novello, General Manager México, Central and South America, Baxter: "Patients, independently of where they live, should have opportunities to stay a healthy, with the highest quality."



Jesse Damstra, Managing Director, Phillips Mexico: "We believe by focusing on these four pillars (Quadruple Aim) we will significantly improve access to quality care for all people in Mexico:

1. To improve the experience of the hospital's staff Improve patient's satisfaction; the first two go hand in hand because if the staff has adequate working conditions they will deliver better care and that benefits the patient.
2. Deliver better care for better outcomes: deliver early and precise diagnosis with first time correct treatments
3. Reduce costs along the way, not only for us but for the customers that are the hospitals and the patients."



TESTING, TESTING, 1, 2, 3--53,000!

According to **Juan Carlos Ordóñez Zamudio, General Director of Salud Digna**, on a given day in fall 2020 over 53,508 people were served by the company, with over 7,000 of those for COVID-19 tests. Although there was a sharp decrease in the number of patients that came to their clinics at the outset of the pandemic, Salud Digna quickly prioritized the safety of its employees, collaborators, and patients,

knowing that health issues cannot wait too long to be resolved. "We knew we had to develop fast and efficient protocols," Ordóñez says. "As an essential service, we never closed, and quickly became the country's leading actor in performance of COVID-19 testing, working with allies and companies that had the right technology. In the beginning, there were only very few companies that could come up with



CAMBIANDO LA DIABETES

Novo Nordisk sigue fiel a su esencia de cambiar la vida de las personas que viven con padecimientos crónicos como la diabetes y la obesidad.

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respaldan

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*Revisa la disponibilidad por clínica en nuestra página web.

¹Realizadas de abril a octubre de 2020.

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the test in the short term, very specific companies and organizations have the knowledge and equipment to go ahead in this area. But Mr. **Jesus Vizcarra**, our founder, wouldn't take no for an answer." In the end, they found out-of-use research equipment from the 'Instituto de Investigación,' and with the help of a former ambassador for Mexico in China, they procured what they needed. "Today we manufacture more than 7,000 tests a day across 49 different sites," Ordóñez says, "with plans to open 29 new sites in the next 30 days. The price for a Salud Digna test was until very recently 1,300 pesos which was the lowest price in the country by an average of 45%, and recently we lowered the price again to 950 pesos because we aim to make it available to the largest number of people."

Ironically, the necessity for diagnoses in one area has meant that other areas have taken a back seat. Take precision diagnostics, for instance. "Over the past months, the MRI/CCTs business has fallen drastically as the focus is on COVID-19-related healthcare issues," says **Jesse Damstra**, **Managing Director for Philips Mexico**. As a result, these personnel are focusing efforts on an array of new digital activities. Diversification goes not only for product lines, but industries, says **Francisco Chávez** of **Thermo Fisher Scientific**, which provides solutions for the food industry, mining, forensics, and automotive sectors. "Some have been on hiatus, waiting for 2020 to end before making decisions," he says. "On the other hand, the market segment pertaining to healthcare and clinical is growing tremendously. There is also a market for Life Science/Biotech which is the cornerstone of our strategy," he adds, noting that Thermo Fisher Scientific is currently working on developing a vaccine, working very closely with labs supplying equipment as well as in the hospital arena where they supply the treatment for specific diseases. "Today healthcare/clinical is very strong and is helping us survive all the costs in a sustained way," he says.

Outside Looking In **PERSPECTIVES ON MEXICO**



In February, **Sandra Cifuentes** was appointed as the Mexico-based **Latam Area Lead** for Astellas in the context of a global commercial re-organization. "We are a Japanese company. Our core is rooted in discipline and collaboration. Our aspiration is that the international markets will be a growth driver, and the mission for Latin America is to deliver in the region and while expanding our footprint," Cifuentes says.

Cifuentes was drawn to the Japanese culture code as the main attraction to work at the company. "We approach our objectives with a spirit of collaboration and respect for our social objectives, employees, and stakeholders," she says. Asked for advice to other multicultural leaders on creating values of collaboration, integrity, and respect, Cifuentes stresses that the most important way to lead is by example. "There isn't a more powerful strategy than doing what you preach and work every day. When we reach a consensus on a certain objective and how we will move forward we do so in a united effort. Consensus does take time, but once we are agreed and have that consensus things move really fast," she concludes.



Sara Montero recently crossed the Atlantic from Spain to be the **Managing Director MAC (Mexico, Central America, and Andean Countries)** for Danish specialist **Lundbeck**, heading 17 countries for the only pharmaceutical company focused 100% on neurology and psychiatry. She notices a stark contrast comparing Mexican to European patients.

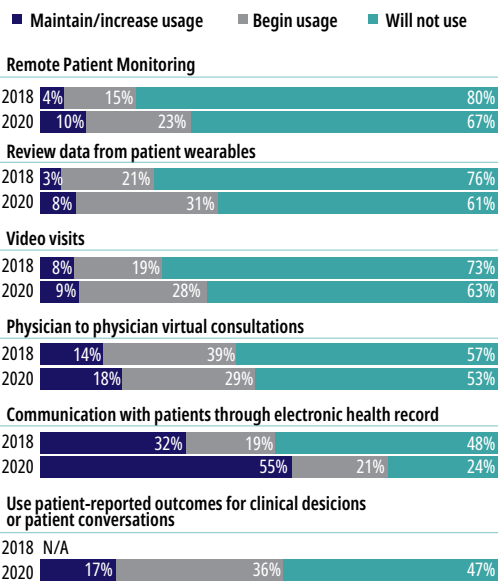
“The average age of CNS patients in Mexico is 27 whereas in Europe it is over 50,” she says. “The nature of the diseases is also different. In Mexico, we have a higher percentage of depression, anxiety, and schizophrenia, whereas Alzheimer’s Disease or Parkinson’s Disease are more likely to be found in Europe, as the average age of the population there is higher.” This means a “huge opportunity” in Mexico, the 20-year-old affiliate which currently represents between 75 and 80% of Latin America’s business.



Augusto Muench, Country Manager for German Boehringer Ingelheim, is a computer systems engineer whose over 15 years of international experience includes France, Germany, Argentina, and Singapore. He says that countries throughout Latin America resemble most of SE Asia in that they “truly need strong health systems but they lack in infrastructure, and the countries that have the infrastructure and allow for a strong healthcare system don’t actually need it as much.” He adds that it’s a complex situation that has been evolving over the years, one that has been heightened with the pandemic and caused huge discussions globally. “Indonesia for example has a population of 230 million people living in over 16 thousand islands and needs a strong healthcare system but it is very difficult to control because the country is huge and difficult to manage, there is a lack of infrastructure which doesn’t allow the fulfillment of the needs of 230 million people. Singapore on the other hand has 5 million people with excellent infrastructure but the people may not have the same needs as those living in Indonesia.”

The intent to use virtual health approaches has increased over the last two years

Survey question: do you expect to increase your use of the following virtual approaches in the next 12-24 months in your practice?



Note: 2020 base=680 (all physicians); 2018 base=624 (all physicians).
Sources: Deloitte 2018 Survey of US Physicians; Deloitte 2020 Survey of US Physicians

Transformando el futuro del cuidado de la salud

En Siemens Healthineers nuestro propósito es permitir que los proveedores de servicios de salud aumenten su valor, y los acompañamos en ese camino, expandiendo la medicina de precisión, transformando el cuidado de la salud y mejorando la experiencia del paciente, todo ello posibilitado por la digitalización del cuidado de la salud.



VIEWS FROM THE TOP



Guy Savoir, CEO of Carnot Mexico, offers three pieces of advice for managing through times of transformation:

- “Decide and be critical about where to focus. Determine where you are adding value to the customer, where you are adding value to the stockholders, and focus your efforts on improving or transforming those processes first.
- Develop a culture of adaptability. In these volatile times, it is critical to have the capacity to analyze and pivot effectively. Implement processes that move quickly from idea to implementation and that analyze the results of the implementation and its impact for the company and the customer.
- Take advantage of “disruptive” opportunities and technologies. These transformational times will come with “disruption” and commercial opportunities, be sure to take advance and implement new technologies where applicable and act upon the opportunities as they become available.



Alejandro Paolini - Managing Director - Mexico, Central America & the Caribbean at Siemens Healthineers: To deal with this unprecedented event, we are sharing our experiences and learnings with other

regions inside Latin America as well as regions outside Asia and Europe.

The main piece of advice is to learn from colleagues in other parts of the world that have already dealt with this situation. It's also necessary to be calm and patient even though it might be difficult to strategize ahead. There is still quite a bit of uncertainty in the region since there's a large spread of projections. Therefore, it is critical to collaborate closely with your colleagues, with different industry leaders, and with the government to align in supporting the country and its people. Keeping the population healthy and safe, and containing the spread of the new Coronavirus must be placed as the main priorities above all.



Juan Jose Aguirre, Director at Grupo Bruluart says: “In our organization, Managers pushed forward ideas for solutions and brainstorming kept coming from the bottom up, which was very helpful in the decision making as well as making us revalue a lot of our employees.”



Sandra Ramirez, General Manager North Hub (Mexico, Colombia, and Venezuela) highlights that Health should not be a privilege, but a right available to every person. Access to medication can be difficult, so we are working to ensure that medication and treatments are available to all patients and not only to a privileged few. Especially in these challenging times, every leader plays a critical role, and has great responsibility with the employees and their families. Basically, we leaders need

Líder mundial en diagnóstico *in vitro* durante más de 55 años



bioMérieux siempre ha sido impulsado por un espíritu pionero y un compromiso implacable **para mejorar la salud pública en todo el mundo.**

La compañía está presente en más de 160 países a través de filiales y su red de distribuidores. **bioMérieux** es reconocida por su experiencia y posicionamiento como líder mundial en microbiología en los segmentos clínico e industrial.

bioMérieux desarrolla y produce soluciones de diagnóstico *in vitro* que brindan información relevante a los médicos para respaldar sus decisiones clínicas, principalmente para el **diagnóstico de enfermedades infecciosas.**

Nuestra estrategia de innovación está comprometida en la lucha contra la resistencia antimicrobiana y el uso apropiado de los **antibióticos**, así como también busca incrementar el valor médico de las pruebas diagnósticas y optimizar el desempeño operacional en los laboratorios clínicos y hospitalarios.



- **Second fastest growing Mexican Pharma** company according to IQVIA.
- Among **top 25 Pharma companies** in Mexico.
- **Multichannel** oriented with **national sales coverage**. (Retail, Public Sector and Emerging Channels)
- **Subsidiaries** in Mexico, **Colombia**, Brazil, **Peru**, and **Argentina** and Indirect presence in the rest of **LATAM**.
- Presence in more than **35 different therapeutic areas**.
- **R&D facilities** that bring innovation to drive the profitable growth of group.

to be calm, maintain our direction and focus, and be positive to successfully manage our teams during this worldwide crisis.



Yiannis Mallis, Vice President & General Manager Mexico, states that the foundation for restoring confidence to the investor is predictability. When investments are made there is always an element of risk but there also is an element of stability or predictability in terms of regulations which is at the foundation of a sound decision. Companies are willing to accept the risk of a business decision but not all companies are willing to accept uncertainty and lack of predictability when it comes to frameworks such as regulatory, legal, or intellectual property rights.

DYNAMIC THERAPIES, DYNAMIC MANAGEMENT

Some of Mexico's most highly innovative specialty pharmaceutical players are led by a crop of newcomer executives, managers stepping up to meet the pandemic as one of Mexico's--and humanity's--biggest challenges.

"In order to continue growing it is not enough to learn, we also need to learn how to unlearn," says **Omar Lugo**, an industry veteran recently appointed as **Country Lead for UCB**. Reminiscing over his beginnings nearly 20 years ago, he says, "When I started, we used an old organizational model, with a silo approach to our structure. Then, we shifted to a Business Unit model; we are now in what we call integrated go to market which makes you, as a company, exercise to continuously reshape and readapt the organization towards a patient-driven approach." Lugo believes in staying agile, and is leading by example--he is currently becoming a healthcare professional, finishing up his studies toward a Bachelor of Psychology that will complement his engineering degree and MBA. "UCB is known as one of the leading epilepsy companies in the world, and we are proud that

in Mexico and the Latin region we are the leaders in the space," he says, with his advanced training serving the company well alongside its one million patients across three therapeutic areas.



Nicolás Linares, Executive Director & General Manager at Ultragenyx, was appointed in 2019, a transition year for Mexico. "Ultragenyx had a presence already in Colombia, Brazil and Argentina, as market access is quicker in those countries, and in Mexico it is more sophisticated to get started," Linares says. The company's mission in Mexico was to bring therapies to patients in need, launching two products for rare diseases. "In spite of the uncertainty with COVID-19 we are still building the team," Linares says. "We know the situation is temporary and we need to be ready with the right people in the field. Healthcare must go on."



Héctor Barillas, Director General of in-vitro diagnostics firm **bioMérieux**, may have some good news for Linares. "Right now, we have a product that can detect Covid-19 in 45 minutes. It can detect whether a patient is contagion with 98% of accuracy. Practically one of the highest precision in the market." This impressive statistic is behind Barillas's goals to increase revenues 50% in the next five years, and spearhead a digital transformation, a welcome refreshment for a company with a long history--25 years in Mexico, almost half of the French company's 55 years. "We have the technology to cover for the full range in the detection of Covid-19, and PCR technologies that use emergency markers to recognize the right antibodies in the patient."



"Before I joined **Ipsen** I did work in very specialized companies but the important thing for me was the culture which promotes a certain mindset: fail fast or succeed fast, but most importantly adapt quickly," says **Mauricio Guizar**, the Mexican affiliate's **General Manager**. He joined the team to build the best specialty team in the pandemic, with a small footprint whose small size, for Guizar, means more room to grow: "We are not really representative because we have 1% of the total global sales but this is where the most important challenge lies. We have to transform the organization from a people's point of view, with goals to develop and attract the best team for the organization. Based on the development of treatments the level of access in Mexico, in general, is very low, and in our specialty areas even lower."

DESARROLLANDO TRATAMIENTOS
PARA ENFERMEDADES GENÉTICAS
DE BAJA PREVALENCIA A PARTIR
DE BUENAS PRÁCTICAS CIENTÍFICAS.



Portafolio de investigación y desarrollo altamente diversificado



Enfocados en enfermedades raras y ultra raras



Dedicados a crear tratamientos innovadores



**Grupo
BRULUART**

**Our goal,
take care of
people's health.**



DIGITAL TRANSFORMATION



“This year, we will organize a digital congress and online educational webinars,” says **Jesse Damstra**. “This is a plan we had in mind for a long time but as we were busy with day to day work never did it, but now we have used the crisis in a positive way to push for a digital transformation. With digitized healthcare, a lot more can be done in a shorter period of time, in some parts of Mexico it can still take 3 to 4 months’ time to get a diagnosis, and in stage 4 lung cancer that makes it either too late or

the possibility of fully recovering is very small. With digitalization and the use of AI I know we can drive efficiency in the system which will be good for all involved.”



Sandra Ramirez, of BMS, considers Digital and virtual transformation as one of our main pillars for the continuity of the business, implementing important digital initiatives for continued engagement with key company customers in the healthcare system.

HOME IS WHERE THE HEART (AND OFFICE) IS

Baxter, a major contributor to the Mexican economy, with three plants and a global IT service center, is looking to augment its “Home Office” with a spirit of “Home Care.” **Piero Novello, General Manager of Mexico, Central and South America**, explains that the Mexican affiliate “has over 30 years of experience in distributing on a daily basis products for patients that need daily peritoneal dialysis. Every month, we deliver products for peritoneal dialysis to over 40,000 patients’ homes. We have developed a robust experience in this field, and in the last months we have adapted our processes to stay with the highest and safest standards.”

“Offering simple solutions and the right conditions for patients to get their medicines without exposing themselves to hospital environments,” says **Martin Cao, General Manager of Amgen México** when asked about how 2020 will be remembered. Cao expects a big shift toward altruistic decision taking. “We don’t have all the solutions but I would really like to be part of the solution along with a collaborative effort of science and technology of the pharma industry to come up with a solution for COVID-19. It is an opportunity for Mexico and I would like to be part of the leadership group prepared to rethink the way we operate.”

General Manager of GE Healthcare, Ramon Acevedo, takes a broader view: “The role of diagnosis does not only relate to COVID-19,” he says. “It is also the basis of healthcare as we cannot move forward with any patient without a correct diagnosis. Our commitment is to provide an accurate diagnosis by way of imaging devices as a core point in a patient’s treatment.” He points toward new systems incorporating AI and digital solutions, and that it’s not only important to provide infrastructure, but also to educate the stakeholders, physicians, nurses and patients on what tools exist. “Our mission and vision, promise and statement are that we are present when it matters most to people, which is why we have teamed up with Ford to make more ventilators available in this time of need, showing our commitment to Mexican society and government, making sure the required technology is available.”

GE Healthcare, which has been in Mexico for more than 125 years, invests close to 5% of its revenue in new technologies, realizing new

Midyear 2020

Total Funds Raised by Function as of 6.30.20

| Function | Total Raised | 2019 (Midyear) |
|----------------------------|--------------|----------------|
| Patient Empowerment | \$1.8B | ↑ 49% |
| Clinical Workflow | \$1.3B | ↑ 49% |
| Biometric Data Acquisition | \$1.2B | ↑ 156% |
| Admin Workflow | \$1.0B | ↑ 111% |
| Wellness | \$988M | ↓ 20% |
| Research | \$927M | ↑ 5% |
| Personalized Health | \$806M | ↓ 12% |
| Population Health | \$649M | ↑ 39% |
| Insurance | \$378M | ↓ 63% |
| Education + Content | \$94M | ↑ 127% |

ways to work and new market trends. “We are in the business of clinical ventilators for intensive care units, monitoring patients in hospital environments, and ultrasound equipment used for diagnosis in hospitals and doctors’ consulting rooms,” Acevedo says. “Efficiencies in the healthcare system are fundamental, the long queues in public health hospitals are common knowledge. We provide tools in aid of reducing those long waits, increasing access through new technologies. Diagnostics through our systems help to make healthcare services more efficient. This shows our capacity to adapt to the new needs of the country doing whatever is necessary to overcome this situation.”

SATELLITE QUESTIONS,

IN THEIR ORIGINAL LANGUAGE

Knowledge and experiences should be shared, in order to grow as a society. To this end, the following questions and answers aim to illustrate interesting perspectives and refreshing ideas that hopefully will allow to make better decisions in the future.



Fernando Sampaio, Country Lead Sanofi Mexico & General Manager Sanofi Pasteur Mexico

EF: ¿Cuál es tu consejo en relación a las decisiones tácticas y estratégicas para pilotear un año de transición y mantener los objetivos de SANOFI en el largo plazo, incluyendo la construcción de una planta nueva?

FS: **Debemos tener un buen plan táctico y estratégico, tener la agilidad de construir un plan en un año especial y distinto y llevarlo a cabo con una ejecución impecable.** Necesitaremos de los mejores y más brillantes talentos en nuestro equipo. De hecho SANOFI es una de las mejores empresas para trabajar a nivel global, en México recibimos una certificación de “Top Employer” por segunda vez y la certificación valora los esfuerzos de SANOFI para desarrollar una estrategia sólida, coherente y centrada en la gente y nos posiciona como una de las compañías más atractivas para trabajar. Para tener éxito es importante poseer una cultura para empoderar a nuestra gente. La retroalimentación y el conocimiento es clave, una cultura empodera a gente a aprender, a crecer y a dar su máximo esfuerzo para cumplir el propósito de la compañía, seguir las estrategias e implementar con toda su energía capacidades y estrategias de forma impecable. Hay mucha investigación sobre el impacto del bienestar en los colaboradores y el éxito de la empresa y nosotros creemos que el éxito de la empresa está basado en tres pilares:

- 1. Tener el mejor espacio de trabajo** con políticas que ayudan a promover verdadera inclusión entre las personas, respeto por cada una de las personas incluidas, garantizar igualdad de oportunidades para todos. SANOFI no tiene código de vestimenta, tiene horarios flexibles, opciones de alimento saludable y opciones para gimnasios y más del 50% de los empleados son de las generaciones del milenio.
- 2. Garantizar un balance proporcional entre la vida profesional y la vida personal**, así como exigimos que nuestros colaboradores den su máximo individual y sean impecables en su trabajo también hemos sido de la las primeras empresas en ofrecer una licencia para padres o madres para disfrutar los primeros seis meses de vida de su bebé sin perder el trabajo, un beneficio que balancea las opciones de hombres y mujeres por igual, también para familias mono-parentales o parejas del mismo sexo que decidan adoptar un niño.
- 3. Retos claros y conocimiento constante**, formalizados de manera muy intensa pero con reconocimiento igualmente constante, tenemos una importante cultura de reconocimiento valorando el comportamiento de la gente porque creemos que los valores permiten que nuestra organización cumpla con las estrategias y capacidad de influencia para lograr las metas. *Los valores son muchas veces la repetición del comportamiento de la gente y es lo que nuestra cultura de reconocimiento trae en primer lugar además de los objetivos*

concretos. Nuestra cultura y valores van desde arriba hacia abajo, de líderes a colaboradores.

EF: ¿Cuáles serán las capacidades necesarias para la industria post-Covid en la interacción con médicos, pacientes y gobierno?

FS: Las compañías y las competencias del futuro tienen que ser estratégicas, analíticas y digitales transformándose en elementos para construir puentes con el sector público. Creo que se construirá esa compañía del futuro a partir de personas con habilidades aunque creo que mi respuesta a esta pregunta en Enero de este año hubiera sido distinta. Nadie pudo prever la transformación que estamos viendo hoy en varios sentidos: manejo de gestión, investigación y desarrollo, tecnologías y aceleración de tecnologías. En mi experiencia en el área de salud hay diferentes perspectivas pero la primera es que soy un paciente, todos somos pacientes y toda transformación de salud debe ser desde el punto de vista y visión de y para el paciente, luego la visión del mercado y la necesidad hoy y en el futuro de producir medicamentos como así también la perspectiva de una empresa que emplea a más de 80 mil personas a nivel global proporcionando medicamentos que permiten cambiar vidas dando expectativa de vida a miles de millones de personas. Estas perspectivas impactan directamente en el futuro de la industria y la competencia fundamental que atraviesa todo es el liderazgo, creo que ser líder es una gran responsabilidad pero también una enorme oportunidad para rodearse del mejor talento y lograr cosas trascendentales. Mi objetivo personal mirando al futuro es poder influenciar a las personas que son parte de mi vida y de mi trabajo para dejar una huella positiva en este mundo más allá de las capacidades u objetivos concretos. Es la gran clave para seguir promoviendo las nuevas generaciones que hoy hacen el trabajo y que mañana serán los líderes del futuro.

EF: ¿Cómo lograste que SANOFI siga invirtiendo en el país y desarrollar alianzas estratégicas para seguir creciendo en México?

FS: ¡Tenemos muy buenos argumentos! Nuestra última gran alianza firmada con la Secretaría de Salud de México es por 15 años para nuestras dos vacunas principales. *En el marco de esta alianza estamos construyendo una planta para el gobierno en un terreno de la Secretaría de Salud, transferiremos al gobierno toda la tecnología de la planta y una parte importante de la vacuna de influenza. Hacemos alianzas de largo plazo, transferimos tecnología para que quede para el país autónomo y soberano y dueño de las vacunas en el futuro. Estamos invirtiendo 130 millones (currency), donaremos la tecnología y capacitamos a mexicanos a manipular un biológico. Logramos esta presencia en México por nuestros 90 años de historia aquí*, es la tercer planta que estamos construyendo y vamos por la segunda gran alianza con el gobierno en vacunas desde el 2008, esta segunda alianza es muy robusta y tenemos en México uno de los precios más bajos en vacunas que producimos a nivel global. *Es una situación de beneficios para todos y la confianza que inspira SANOFI independiente del mando político trasciende todo. SANOFI tiene total confianza en este país y la total certeza que la forma correcta de hacer negocios es ser aliados y socios del gobierno cuando se trata de estrategias de la salud pública.*



Dr. Roberto Tapia, Country Lead of Carlos Slim foundation

EF: How do you balance tactic and strategic decision-making between communicable and non-communicable diseases? How do you allocate resources to both areas with the present urgent need to address Covid-19?

RT: Coronavirus has shown us there is an interaction between infectious and chronic diseases, individuals become more vulnerable if they already have a preexisting disease (obesity, hypertension, etc.)

and generating risk for the patient. We have been working a lot on digital health applied to detection, management and control of chronic diseases all through digital health platforms. These platforms are a huge benefit and they need to be at the center of the health systems as they provide the necessary information to make informed decisions at the patient's level allowing for a personalized risk assessment, addressing each individual with personalized solutions. A mix of chronic diseases, infectious diseases, social conditions and digital health provides the capacity of strong data or business intelligence. We can even include new knowledge like genomics, proteomics and metabolomics, add this information in a unique and intercommunicated process which will allow for better decisions and generate solutions. We are totally focused on using digital health platforms because it allows us to find a solution that will cover the entire spectrum from general planning management to a personalized intervention. We are in the era of personalized public health interventions which is a reflection on the power of information. This is a new concept to manage health, risk, prices, etc., all on a digital platform.

EF: Invested in digital health as you are what would be your advice to other leaders willing to get into digital healthcare but don't understand how it works? What are the success metrics for this sort of endeavor?

RT: The crisis has actually provided a very interesting opportunity for any industry or business to look into the health of their employees, monitor them, know what they are doing and even intervene to maintain their health conditions. The pandemic has generated the issue of health conditions in the working environment not only physically but emotionally as well (mental health) and it's a way of knowing more about our workforce to allow for a better quality interaction generating benefit. I think it is better to partner than to start something from scratch, to learn from others and from their experience. As a result of a learning process and working in alliance we are doing amazing things digitally speaking. Partnerships are an excellent way of creating excellence and taking advantage of joint knowledge.

EF: Could you highlight any digital project you are particularly proud of?

RT: Early detection and diagnosis for chronic diseases to detect individuals that don't even know they suffer diabetes or hypertension. Chronic diseases are one of our strongest areas and now we are linking that to Covid-19. We are pushing ventures that offer possibilities to those infected with SARS Covid-2, our digital platform MIDO (Medición Integrada para la Detección Oportuna) is population based, done all over the country to generate the capacity to empower companies, we have an electronic vaccine system which is a very strong vaccine system to maintain vaccine coverage per individual (per adolescent, per child, etc.). For the new vaccine we need a similar information system which is very sophisticated but at the same time easy and down to earth. Thirdly we have a development we have generated for monitoring our population employee base but we are also doing this for other companies to monitor the health to have a daily record on the individual health of each employee. We also include them into our chronic disease genomic with all the pertinent information and the capacity to add continued medical education.

EF: How do you think we can keep momentum in the allocation of health resources in Latin America?

RT: It is a moment to learn more about health investments and that they must not be neglected; managerial experience and technical experience investment is very relevant and through them we can maintain momentum.



Eric Hagsater, President of Chinoin

EF: With the current worldwide situation, what would be your advice to others in positions of leadership, on the transition of a crisis such as what we have on our hands at the moment?

EH: We must rethink strategy, market supply, and the demand for all kinds of products and services which means changing or adapting our plan to the new circumstances. Unfortunately, the panorama has changed greatly. Many supply lines have been disrupted due to the ban in India to export a number of medicines and the closing down of factories in China which are now slowly beginning to open. On the other hand, we have a very high demand for our products and many of us in Mexico has doubled our budgets in sales. We are very much involved in respiratory diseases and our influenza products particularly those with antivirals have had a huge rise in sales, fortunately, we have a big supply in our warehouses because the winter was relatively mild but it has been an amazing month for us working 24/7 shifts to keep up with the demand. We usually have a two-year supply of APIs in our warehouse which has been fantastic because we have been able to supply the market with everything in stock.

EF: What was the rationale behind the strategy of so much supply, how did you manage to be so proactive?

EH: In the past, we had a case where a supplier had a fire in their plant, and it took them close to two years to be up and running again and as it is not easy to change suppliers, I decided this was not going to happen to us again. Since then, we have always had a large supply of our main strategic products.



Omar Lugo, Country Lead of UCB

EF: ¿Qué tipo de líderes necesita la industria farmacéutica del futuro?

OL: En cualquier sector o industria los nuevos líderes deben tener integridad. He sido Scout desde los 15 años y me enseñó sobre la importancia de la integridad, humildad y trabajo en equipo, valores que aún priman en mi escala de valores y son la base de mi liderazgo. El ser accesible y humilde son rasgos clave para ser un buen líder. En UCB modificamos el plano de la oficina, mi espacio de trabajo hoy como Country Lead es muy similar al de un pasante básicamente porque creo que esto crea una mejor sinergia dentro de la organización, fomenta un espacio de trabajo más saludable, hace más accesibles a los ejecutivos y la nueva configuración de la oficina conlleva a que los empleados se sientan valorados. Adicionalmente liderar con el ejemplo es la mejor forma de gestionar, "Las palabras mueven, pero el ejemplo arrastra". Por otro lado invertimos y confiamos en nuestros recursos humanos, por ejemplo patrocinamos con orgullo la especialización en epilepsia de una empleada en el Cleveland Clinic. Será una de las pocas especialistas en México, incrementará el estándar de los cuidados de epilepsia y aportará a una base de conocimiento; y como empleada de UCB entregará valor agregado al viaje del paciente. Invertir en personas implica crear un diferenciador sostenible para el futuro y para la medicina.

EF: ¿Empleas los conocimientos y habilidades de tu carrera en bienes de consumo al negocio farmacéutico?

OL: Después de haber trabajado hace más de 20 años en Coca-Cola –que entiende las necesidades del consumidor muy bien- y haber realizado un MBA entiendo que lo que fue cierto para la industria de consumo hoy es una necesidad para la industria farmacéutica. Realmente necesitamos entender mejor a nuestros pacientes para así entregar mejores soluciones a sus problemas. Debido a que existe

una falta de soporte psicológico hemos creado programas de apoyo al paciente que consisten en el apoyo de parte de los profesionales de la salud desde un aspecto psicológico de la enfermedad a los pacientes y cuidadores. No se discuten opciones de tratamientos sino que se habla de sus vidas y sus preocupaciones desde un punto de vista social, por ejemplo ayudamos a una madre que acaba de saber que su hijo tiene epilepsia. Trabajamos en dos áreas terapéuticas: epilepsia y Parkinson, trabajando con todo el grupo familiar. Se trata de escuchar y ser empáticos con nuestros clientes-pacientes y es una manera de agregar valor e impactar sus vidas con experiencias positivas.



Tanuj Mehta, former internim CEO of Pfizer México

EF: ¿Cuál es la presencia actual de Pfizer en México y cuáles son los planes para el futuro? ¿Es verdad que la planta de Toluca se está posicionando como proveedor regional?

TM: La presencia de Pfizer en México es de las mayores operaciones de Latam Pfizer, tanto en oficinas comerciales como plantas. La planta de Toluca es fundamental a México, a la región y más allá y estamos exportando a más de 50 países. Tenemos elevadas aspiraciones de crecimiento para México aún con la desaceleración de la economía el año pasado y coronavirus este año. Para lograr nuestras expectativas de crecimiento necesitaremos gran cantidad de personal y recursos en México.

EF: ¿Cuál es tu ideal de distribución como líder en la coyuntura actual en lo que se refiere a tácticas, estrategias y adecuaciones necesarias?

TM: Debido a la necesidad de luchar contra incendios constantemente la mayoría de mi tiempo está dedicado a lo táctico, en lo que respecta estrategia mi equipo recalca en mí persona por lo que he reforzado el empoderamiento del equipo. El liderazgo en México es distinto a Estados Unidos y a otros países en que he trabajado, y por necesidad me he tenido que adaptar a la cultura del país por medio de aprendizaje acelerado. Reforzar el empoderamiento del equipo significó transmitir el concepto de crear juntos estrategias mientras luchamos contra los incendios. Mi foco está puesto 50% en estrategia, 25% en táctica y 25% en soluciones innovadoras.



Sandra Cifuentes, Latam Area Lead of ASTELLAS

EF: As a Japanese company that has a very strategic mindset with long term objectives how do you balance tactical decisions based on day to day operations to ensure business continuity while dealing with Covid-19?

SC: Ensuring business continuity during a pandemic is a challenge for all of us and there is no magic formula to succeed. We have a responsibility as an organization, and we care about our employees, the health system and the different stakeholders. We are alert and seek to understand what is happening around us to take the right decisions. We need to be very flexible in our approach to customers, and medical society has to be adapted- .

We also see new advancements coming in, such as telemedicine, that is changing the needs of customers. Historically the doctor had a face to face interaction with each patient and that now has gone to fifteen minutes of focus for each patient 's ailment as well as for the human side of the relationship. We must understand and support how customers, physicians and patients are coping with this new digital world while balancing the priorities of the business, mitigating the impact of Covid-19.

Covid has created an additional barrier within the Latin American healthcare system so we are focused on providing emphatic solutions for the different interests groups. Our customers and our teams are adapting to this change and my job is to acknowledge all this, be flexible and embrace the changes that are needed to adapt to the circumstances. It is very important that the decisions made are taken towards your objective, in our case, creating value for patients. We also need to be very attentive to listen and read what is happening in the market, and acknowledge that changes are happening fast .

EF: Have you, as ASTELLAS, identified some of the key trends pharma companies will need to advance on? What is the required skill-set for the company of the future?

SC: operational tools and skills are very important to run the business. In order to grow strategically, skills that help you read the moment, understand the priorities and urgency will allow you to provide a better outcome for all parties. For example, when ensuring supply chain, it is crucial not only to know the rules of the market, but also have information on new trends such as home delivery Having increased stock might be important to ensure security of supply in some of the Latin American countries. The environment needs to be read correctly through a an apparently common capability which is the ability to listen and interpret what is happening. We all have different ways of adopting the use of technology and managing our customer facing roles : for some will be easier than for others. People raised in the era of new technologies may will find it easier to adapt than the more mature and experienced professionals, as they are better on a hands on relationship with the customer, but again we cannot assume this as a rule The different stakeholders and health systems are suffering and need to optimize to maximize their resources to deploy innovative access solutions. In a situation like the present, chronic patients might get left behind and it is our responsibility to ensure those patients are not left out for long because there will be a cost to pay for all the parties. Another capability to be taken into account is building confidence in the customers and patients so they come back to the system once the healthcare systems of the different countries allow for it. There have been changes like doing digital launches and managing regulatory agencies that e taking up with everything related to Covid-19. There are other additional capabilities more related to soft skills, like understanding, building confidence and some very hard skills, innovation, providing access to patients and supporting the concerns in terms of resources, organization, investments and attention for chronic patients. One skill doesn't work without the other, they complement each other, and the whole is greater than the sum of each skill.

In Latin America there are countries that before Covid-19 telemedicine were already regulated; others were trying to catch up and some did not have a framework at all. We need to be agile in understanding the circumstances of each of these markets, each one is in a different stage, Even if there are regulations, they might not be implemented, or they might not be ruled, or they might not have a plan to regulate in some cases. A lot of information and communication is required, as is dialogue with Chambers, with customers and organizations across the region to develop knowledge and to try to influence the health agenda. The pharma industry must work together to achieve access for Covid-19 patients but also for chronic patients that are not getting to the system at the moment.



Ramón Acevedo, General Manager GE Healthcare Mexico

EF: What are you offering on AI, business models and the adaptation of the GE portfolio for Mexico?

RA: *GE has been in Mexico for more than 125 years*; we fully understand the dynamics of this market, the way the government, and the private institution's function. The full portfolio we have today is adapted to imaging around diagnostic needs and life support activities. *Our products are designed for diagnosis, therapy, and treatment of patients.* We are in the business of clinical ventilators for intensive care units, monitoring patients in hospital environments and ultrasound equipment used for diagnosis in hospitals and doctors consulting rooms so we have a wide breadth of business that is evolving in this digital era. *We have AI tools to provide the best diagnosis, as they see beyond the doctor's eye, ensuring an accurate diagnosis. Efficiencies in the healthcare system are fundamental, the long queues in public health hospitals are common knowledge. We provide tools in aid of reducing those long waits, increasing access through new technologies.* Diagnostics through our systems help to make healthcare services more efficient. Our mission and vision, promise and statement are that we are present when it matters most to people, which is why we have teamed up with FORD to make more ventilators available in this time of need, showing our commitment to Mexican society and government, making sure the required technology is available. This shows our capacity to adapt to the new needs of the country doing whatever is necessary to overcome this situation.

EF: The concept of 'diagnosis' has taken on a protagonist role since January this year. How do you think you can keep the momentum on the importance of diagnostics beyond COVID-19?

RA: The role of diagnosis does not only relate to COVID, *but it is also the basis of healthcare as we cannot move forward with any patient without correct diagnostics. Our commitment is to provide an accurate diagnosis by way of imaging devices as a core point in patient's treatment, we develop new technologies and systems* incorporating AI and digital solutions to ensure the correct diagnosis and so apply the correct therapy. Additionally, it is not only important to provide the infrastructure, but also educate the stakeholders, physicians, nurses and patients on how important it is to be correctly diagnosed, and what tools exist.

EF: How would you grade the level of adoption of the latest technologies and innovation in Mexico, both from a public and private standpoint?

RA: *In general the adoption of new technologies appears to be linked to the age of the people using it. Our aim is to make our products easier to use so the physicians' age when using the technology is immaterial and they have only to focus on generating the diagnosis for the individual patients.* The technology incorporated in all our digital solutions is moving very fast, over a year ago independent companies presented different AI solutions and since the last RSNA these solutions have already been incorporated into the different products provided in the market so what was an innovation in 2018 is today a reality already implemented and used in hospitals. Our philosophy and commitment as manufacturers and designers of technology are incorporating high technology that is user friendly so that the focus is not on the technology but on the patients and diagnosis of that patient.

EF: What message would you like to send to business executives of the healthcare sector and beyond to strengthen investors' confidence in Mexico?

RA: *Have a lean and ready organization that can adapt to current environments.* As leaders, we must provide guidance, communication channels both internally and externally are very important in leadership for collaborating and providing solutions. *We are responsible for giving hope that things will continue and we expect our people to continue freely contributing to the organization.* Together we are

stronger and can overcome any situation regardless of the difficulty involved. Thirdly in situations such as the present, we must collaborate with the government and our other companies, competitors in some cases, for the Mexican population to get what it needs to overcome COVID. AMID is doing a very good job in coordinating that effort and I believe we will be in a better situation shortly. *We must generate collaboration among the different companies and the government because all that really matters is the people.* The message to my team would be that regardless of selling technology at the end of the chain there is a person that needs to be cured and we have the opportunity to do better for the patient, but more importantly, assist the decision making physicians to treat patients and prescribe therapies. We must continue to be close to our customers especially in these turbulent times, keeping our eyes open to identify the opportunities and act on them.



Juan Carlos Ordonez - Salud Digna

EF: Your strong points have always been diabetes and eye-tests, both non-communicable diseases, and yet here you are 5 months later providing services for communicable diseases. How fast were you able to adapt your portfolio, how did you manage to have this incredibly fast reaction and capacity to adapt and adjust?

JCO: We like to think we are both flexible and fast learners. Our team is very open-minded, hardworking and creative. From a logistics and an expansion point of view flexibility and open-mindedness are essential because this is a situation we weren't prepared for; not us, not the private sector, not the government or any government for that matter, so we need to react quickly and positively. We have a team, a mindset and an organization that can deal with whatever comes and I think our people has shown these past months that they are the very backbone of our organization and that they also can rise up to a challenge of this magnitude. I look forward to the moment where we can meet and look at each other in the eye, and exchange stories about all the difficulties we had to deal with. Just a "mission accomplished" kind of meeting.

EF: What would be your advice to build momentum in planning next year's budget allocation of resources?

JCO: We analyze each of our big projects that involve investment, in 3 cases we decided to wait it out, as we cannot make decisions in the middle of the existing whirlwind reality. We had planned big changes to optimize efficiencies in the organization but we have decided to put that on hold as it involves a big allocation of resources. We have a meeting every 15 days to review the situation, the pandemic, doctor's opinions, vaccine situation and how we are handling the new normal. Mammographies, pap's and our eye tests are not at the level they were this time last year but laboratory, tomography and X-ray have tripled. We are offering tomography tests 24 hours a day at some clinics as that is something that generally cannot wait. But this is uncharted territory so I strongly advise caution, to not assume anything, not to take decisions to cancel investments but to analyze what's coming and wait it out always aware that these moments are also moments of opportunity for those who have capital.

EF: What would you like this 2020 to be remembered for as far as your organization is concerned? What could SALUD DIGNA epitomize this year and what would you like to stand out for considering there are 4 months of the year left?

JCO: What automatically comes to mind is that we need to be a leading participant, no easy task as there will be a lot of effort involved from us all to get out of this situation with the least amount of pain

possible. I have tried to get the message through to my team so that they are aware of the commitment needed and of the sense of urgency. Since we began performing Covid-19 tests and testing 7000+ thousand patients per day we are very close to reaching a total of 500 thousand Covid tests. That is a lot of people who have found an answer in a time of need at Salud Digna and not only in testing but in all the other areas where we offer quality services to our patients at the lowest price in the market. We are delighted with what has been achieved and I would like Salud Digna to be remembered as part of the solution and as a social sector organization that made a great effort and delivered, for the nation. Apart from the public sector we are the largest provider of Covid-19 tests in the country with the largest capacity. It has been the hardest thing I have ever done by far in the nine years of being a part of the Salud Digna team. It has been a very challenging but incredibly satisfying journey.



Yiannis Mallis, General Manager of Novo Nordisk Mexico

EF: As global key leaders in diabetes treatment what is your clinical research footprint like in Mexico?

YM: I am proud to say Mexico is a stronghold for clinical research, both because we have a fantastic team here and because there are great investigators across the country. In some of the most important and most recent trials, Mexico has contributed up to 10% of the patients. In the latest clinical program called "SUSTAIN" for our new diabetes product, which was a huge clinical program with close to 40 thousand people with Type 2 diabetes participating, Mexico contributed between 5 and 10% of the patients. This was very much appreciated by COFEPRIS as there is always discussion if local data match what is seen globally in the trials, and this time we can say with absolute confidence that it does.

EF: Could there be more invested in reducing complications for diabetes and obesity? What could be done in prevention?

YM: We have been working on this front in the last years with different stakeholders, because the healthcare system will unfortunately not live up to the strain of diabetes the way we have been doing it up to now. Primary prevention of new cases is very important, but also difficult and we will only see results long term; it could take up to two or three generations, but it is worth doing. The immediate need is to prevent diabetes complications, which drive more than 90% of the total diabetes cost to society. To do that we have to invest in building up skills, diagnostics and knowledge for the physicians and the patients, as well as invest in better treatments. Obesity is an even more complicated issue as most people aren't aware of the cost to society obesity has; it could be as costly as diabetes, as almost 75% of the population in Mexico is either overweight or obese; we have one of the highest rates in the world. It is also hypothesized that a significant percentage of specific types of cancer are due to obesity. The disease itself is serious and its complications even more so, but as obesity is not treated as a disease in most countries, we aren't really aware of the magnitude of its impact. We need to speak about this health issue in human terms, as there is probably no other disease that touches so many people in Mexico.



Alejandro Paolini, General Manager of Siemens Healthineers Mexico, Central America, and Caribbeans

EF: Could you elaborate on Siemens Healthineers long term vision? Has that been influenced at all by recent events?

AP: The focus of our long term vision is to continue to grow in existing

markets, enter adjacent fields and conquer new markets. As an example, last year we completed the acquisition of Corindus, one of the leading companies that offer a robotic treatment platform for major vascular therapeutic markets. It allowed us to achieve additional growth and tap adjacent markets. In regards to the pandemic, there is currently no intention to shift our long term strategic goals. It is true that we are already seeing some important changes in the economic scenario, however healthcare must go on. The government needs to start investing at a higher level, while the private sector must keep investing. And we want to be part of this by being closer to the main institutions, creating new protocols and business models that can benefit our population with a better and more accessible healthcare.

EF: The economic impact of covid-19 is immediately apparent today. How would you maintain the momentum of interest and investment in healthcare after the pandemic has passed?

AP: Maintaining investor interest is a priority right now especially for the current global situation. The vast majority of global companies have been affected by the economic impact of the pandemic. The key to maintaining investor interest is to show that we are taking decisive actions and that we are resilient to this kind of crisis, as has already been demonstrated for Siemens Healthineers in Europe and Asia. While we are certainly taking this crisis seriously, both in terms of health and economic impact, it should be noted that we've been taking actions that will probably position us in a better place post-pandemic. This is only possible through a combination of resilience and decisive decision making.



Sandra Ramirez - General Manager of Bristol-Myers Squibb Mexico & Colombia

EF: Last time we spoke, you had cracked the top 100 list of the most powerful women and now you have done it again, only now you are in the top 50, so what are you doing differently to be considered as such?

SR: I'm very proud to be part of the ranking. This is a recognition to my team and the entire organization, which is focused on innovation as well as diversity and inclusion.

Our work is based on four main topics:

- Clear commitment to offer equal opportunities for women and men, ensuring we provide development leadership programs for women. Also, endorsing excellent conditions for diversity and inclusion.
- Generating engagement within our employees to continue working creatively in high performance teams to achieve our goals.
- *A different way of working: other companies aim to solve immediate problems whereas we have tried to go to the core problem and from that standpoint, we work at how we can help.*
- Maintain our patients in the center of everything we do.

EF: BMS is surprisingly nimble for a company of its size and committed to critical research as you are. How have you been affected as not everything can be done digitally?

SR: The clinical research team has been working from home since March. On August 3rd, they returned to the field and are working with the institutions and the medical community to support patients. We are fortunate enough to have the technology and company structure needed to work from home, so the RCO team never stopped working and are in continuous contact with the physicians and patients undergoing the trials, which is proof of the commitment we have with the protocols we are conducting in Mexico.



Guy Savoiron, CEO of Laboratorios CARNOT

EF: You are a Mexican visionary when it comes to healthcare and in this new decade, so what footprint would you like to leave, as a health influencer and what you would like to be seen for?

GS: I would prefer to be pushed away and forgotten, but I do think Mexico has a significant capacity to bring forth higher technology products. Bigger innovations can be brought out of labs and translated into clinical operations, the basis is there but the ecosystem needs to be improved in order to advance. My role is to be one of the first players to manage medium or light successes, because first attempts are never huge success stories. My role is to push and generate, to create the pathways for others to use for future successes. There are globally bigger, richer, smarter people around the world that when they see this sort of success I hope will come to the market and generate a larger push and therefore I will most certainly be pushed away. I want my work today to pave the way for the ecosystem to become viable, for the people doing new technologies to understand what they need regarding IP, legal organization and tactical development so they can be sellable.

EF: Do you have any advice for the future science and innovation generation?

GS: My recommendation to the coming scientific innovative generation would be that science for the sake of knowledge is very commendable but of limited value, for science to really reach its potential and benefit mankind it needs to be applied. My message to the future innovators of Mexico is for them to focus their innovations on the bare needs of mankind on the big problems.



Héctor Barillas, General Director of bioMérieux

EF: ¿Como embajador de la transformación digital de bioMérieux, cuál cree es el potencial de esta transformación para reformar o redefinir el modelo de negocio de farma y de salud?

HB: Con el fin de adoptar un nuevo modelo tenemos un proyecto a cinco años para la transformación digital. La transformación será interna y para nuestros clientes y ya hemos comenzado a implementar algunos sistemas. Fuimos muy oportunos lanzando Yammer, una Red Social Empresarial el Diciembre pasado y cuando llegó la pandemia a México ya teníamos los equipos y las herramientas necesarias para trabajar remotamente. Estamos comenzando nuestro proceso de reclutamiento basándonos en estos sistemas y la nueva forma de hacer negocios con nuestros clientes estará en funcionamiento a fin de año y todo el proceso estará instalado y en operación en dos años más. *Covid-19 ha funcionado como un acelerador catalizando la transformación digital en la salud, aunque aún nos estamos adaptando digitalmente, por ejemplo reuniones consecutivas por ocho horas puede ser muy agotador. Tenemos un plan en lo que se refiere a marketing, los médicos están muy dispuestos a trabajar con nuestro estilo de plataformas porque a pesar del confinamiento están muy expuestos. El Covid-19 realmente nos ha abierto las mentes y a la par también evolucionan nuestras teorías y curva de aprendizaje.*

EF: ¿Es acertado decir que habrá un giro de un enfoque micro-biológico a uno molecular?

HB: Actualmente la biología molecular es una mega tendencia en nuestra empresa como lo era microbiología diez años atrás. La biología molecular es mega tendencia aun cuando los marcadores no son fáciles de leer y a pesar de que transición se ve afectada por el costo de innovación.



Juan José Aguirre Salazar, Director at GRUPO BRULUART

EF: How do you see the future of distribution and pharmacies post Covid-19?

JJA: In Mexico there is a very restricted process for pharmacy delivery, it can't be done for any products that weren't done by OTC trucks; the other products have to be picked up at the pharmacies and this activity is very closely monitored for things like the cold cycle. But now the government has loosened up a bit and delivery can be taken up for a bigger part of the sector, drugs for diabetes or blood pressure could go direct to the patient's homes in the future, but these days we are seeing not so much delivery as a lot of people going to pharmacies to treat any kind of ailment. Since last month we are getting very good numbers of people using our pharmacies, a lot of them to make sure they haven't got Covid, the same thing happened ten years ago with the influenza. In Mexico we don't have a health prevention culture and this means people don't go to the doctor until they feel really sick but now due to Covid they are going to the doctor or pharmacy even for the slightest throat ache, and this has helped our sales. We have also taken steps in our pharmacies to ensure our customers are safe by having disinfected mats, sanitizer, face masks, plastic masks and gloves for attendants to encourage them to come and feel secure. It's about safety and trust.

EF: As you are in the distribution business for pharmacies and medicines what would be your advice to ensure the delivery of a vaccine or two dose vaccine if necessary, in Mexico?

JJA: AstraZeneca is pairing up with the Slim Foundation to bring the vaccine to Mexico and the important thing is to get the product here. Last year the government practically dismantled the public sector distribution chain so to get the vaccine distributed in a fast and efficient way they will have to rely quite largely on private pharmacies because we already have a point of sales and people come to us. Even if the government had a vaccine they do not have the capabilities to do the distribution and get it to their clinics and hospitals, at least not to the whole country and especially not to the more remote areas, like small villages of 80 people in the jungle of Yucatan who need the product. To get the product worth 800 pesos to an inaccessible village might cost 5 times as much in fuel and transportation; the government thinks the distributors make a product expensive but Mexico's geography makes it an expensive country to distribute goods. We have established a whole array of distribution methods which we rely on with small distribution warehouses in Chiapas that distribute to even smaller distribution warehouses and from there people will pick up the products, sometimes on horseback as they live in the jungle. We even have people distributing products on horseback. To cover distribution for maybe 80% of Mexico all these small steps are necessary, which are costly and time-consuming but I think we are in a very good position to help the government get the vaccine or treatment to be available to the most secluded and remote corners of Mexico.



Nicolás Linares, Ultragenyx

EF: Does rare disease awareness exist in Mexico and what can you do to increase this awareness?

NL: For the last ten years rare diseases in Mexico have been part of the healthcare agenda and that is growing. Patient advocacy groups have driven changes within the regulatory and healthcare agenda to the extent that now there are specific laws and regulations for patients with rare diseases and though there is room for improvement in the processes there has been an evolution in the rare diseases industry over the last years. Today for example in a hematology ser-

vice all the resident doctors know about Gaucher's disease, whereas 10 years ago they did not even know it existed, so there has been an important journey made through the learning curve. Market access is still a big issue, as it takes 4 to 5 years to get a drug approved for a rare disease due more to market access processes than COFEPRIS and regulatory agents. That gap needs to be closed with the early adoption of innovative therapies. The challenge for increasing medical awareness is to shorten the time of diagnosis. On average a rare disease patient takes 8 to 10 years to be correctly diagnosed taking again on average 10 to 12 specialists before they get an accurate diagnosis. It all boils down to medical education on different rare disease symptoms, how to diagnose and do quick referrals to geneticists or find support with other specialists that can help with the diagnosis. There is a project in the house of deputies and in the senate at the moment to screen newborn babies very easily with a spot of their blood, testing them for multiple diseases. Early treatment changes the outcome of the disease especially when they are discovered at such a young age. There are a lot of gaps to close although the work done by pharma companies, medical societies and patient advocacy groups have shown progress in the healthcare agenda.

EF: What is ULTRAGENYX's ambition for Mexico?

NL: Our mission –also our ambition– is to provide needed therapies to the Mexican patients. ULTRAGENYX brings a very interesting portfolio of innovative and gene therapies which are the future of healthcare. Our pipeline is for rare diseases treatments and our long term challenge is to reach every single person in need of treatment in Mexico and give them the adequate care for their condition and to do this we have to work very closely with the government proving our therapies work. Finally we must invest in Mexico. We have a big country with a thriving economy even with the recession that is coming. It is an interesting market and it makes a lot of sense to continue investing here. The first step is to get market authorization and bring the first therapies to market which will be the building blocks to bring future innovation, revolutionary therapies and innovative solutions. After Brazil we are the second biggest market in Latin America.



Pablo Bufano, Managing Director of DRAEGER MEXICO

EF: Considering a long term vision in healthcare is necessary, what are DRAEGER's long term strategic goals for Mexico?

PB: A few months ago my answer would have been we have a 5-year strategic plan for Mexico to duplicate our volume from 2018 to 2023, looking to customer-solutions to enable us to reach that goal. Covid-19 has changed our long-term plan, we decided to focus on business continuity rather than business growth. Our production site is working in 3 shifts, and we are working hard to procure imported parts to produce the devices we offer. Some of our supplies are imported as they are sensitive and require sophisticated technology, especially the ones for respiratory devices. Our long-term strategic goal is to grow and while it might seem easy with today's situation, we have to prioritize strategically our customer base to focus on our business, without leaving aside the social impact, which it is not easy. We will have to reconstruct relationships and we hope they will understand the reasoning behind our decisions, that focus our values as a company.

EF: Could you elaborate on the current status of the DRAEGER Academy, focused on training healthcare workers to better utilize your devices?

PB: We provide high-quality, highly-configurable products. Because of this, devices can be configured to specific needs. This is where our

academy comes into play. We want doctors to use our products at their full capability, to provide better healthcare. To this end, we organize meetings, workshops, and seminars to teach doctors how our products can be tailored to specific needs. To take advantage of the technology you need education. This is why we will introduce certifications that will add value to our customers when using our products.

EF: With the shift we have been seeing in healthcare, in general, how do you envision the future of homecare specifically in Mexico?

PB: We aim to have all healthcare devices integrated so the doctors can make better and faster decisions. This is not always possible mainly because our health services and systems are not all integrated so the doctors have to input the patient's information. What we are seeing now is that all company devices are more integrated and can connect to the network to include all the patients' information which will be used in our case to regulate the ventilation and anesthesia the patient will receive so if the data varies it will need to be cross-checked. This is the direction devices are taking at present allowing for faster and better decisions, we are participating in a new code for all devices of different labels to work with the same communication technology so that devices from different companies can talk to each other as well as being able to access all the information the device is generating. Our machine has a database where we collect all the information including when the machine will need a service or repair without having to put the device offline for the actual repair. This is the future of healthcare devices.



Lourdes Muñoz, GM Nestle Nutrition Mexico

EF: What kind of message would you like to send to other aspiring young women that might be reading this?

LM: There are a few main messages I want to communicate to other women. First, you should always be true to yourself. Throughout my career, there have been people telling me to behave in a certain way. However, the only way you can find passion in your work by being true to your values, beliefs, and who you are. Related to this is that we don't have to become men. There's this notion that in order to be successful in business, you need to behave like a man, to act, dress, and talk in a certain way. However, in doing so, that takes out any advantage of being a female leader. As women, we should lead through our femininity. Secondly, we, as women, need to prepare. Although there's a movement to "level the playing field" so to speak, the fact is that we are still working in organizations with cultures created by men. It's not to say that men are good or bad, but if our goal is to balance the working culture, studies suggest that we need 35-40% of top management to consist of women and minorities. We still have a long way to go. Because of this fact, we need to prepare ourselves to enter such a culture while not only maintaining our femininity but allowing it to transform our environment. Third, I want to stress the importance and responsibility of role modeling at a leadership position. Our work-life balance is an essential part of that. If I were to arrive at the office at 7 am and leave at 12 am, no one would want to live that sort of life. We need to observe how we behave in all aspects of our lives, and be aware of the kind of message that sends to young women. Role-modeling is a 24 hour job. However, all of it must come from a true part of yourself because people will see through any pretense (which relates back to my first point). The last message I want to send is that women empowerment is more than a good social cause. Over 50% of college graduates are females. If a company is not conducive towards recruiting, maintaining, and developing women, that company will lose out on the majority of future talent. Employment numbers need to match the graduation rates or else future human resources will become less and less sustainable.



Hector Valle, Executive President of FUNSALUD

EF: With the changing demographics there could be a changing epidemiology so what new therapeutic areas do you think will be more of a concern in the next decade?

HV: Cancer is already big and it will get bigger, INCAN has a predictive statistic that says 1 of every 3 women and 1 of 2 men will get cancer by 2030. That bleak statistic tells us 50% of the men and 30% for women will have cancer by 2030. Mexico also has a big issue with obesity, diabetes and cardiovascular and that includes from day to day diabetes treatment to dialysis and everything in between. FUNSALUD is working on prevention and we have developed a program together with the Consejo Mexicano de Negocios we call "Compromiso por la salud" which consists of three areas, a company physician to do pre-detection and programs for the specific patients, personalized nutrition and exercise and all our companies around the country are joining the program. The third area I foresee as an issue is mental health and we are developing a national program called Wellness Mental Health which is being launched as we speak and we are doing analysis in five different communities to understand how mental health is evolving and based on that we will launch an e-assessment, so that people can access and understand if they suffer from anxiety, depression or any other symptom and if so to be directed to a physician. It's a way of training patients as well as physicians using e-material for mental health detection. I think this will be big as it is growing very fast and will be a burden and therapeutic area to watch. FUNSALUD is also looking at orphan diseases, we have a mandate from the Minister of Health through the Consejo de Salubridad General to do the national registry of orphan patients which we plan to deliver in a few years as we have already done with the national registry of cancer. With the FUNSALUD council we are writing a book on the status of new technologies in Mexico, how to include them in the existing policy and on their implementation in aid of closing the gap. When it comes through it will make cost come down and give access to the Mexican population.



Vincenzo D'Elia - General Manager at Laboratorios Alfasigma

EF: ¿Cuáles son las prioridades de tu agenda hoy?

VDE: Hemos definido unas 10 prioridades y ante todo la salvaguarda y seguridad de toda nuestra gente incluyendo nuestros clientes, dejando de visitarlos para protegerlos del contagio. Segundo nos estamos focalizando en los valores básicos de nuestra compañía estabilizando el negocio con la "nueva normalidad" y forma de tra-

bajar, sin dejar de ver hacia afuera. Tenemos un increíble nivel de comunicación con nuestra gente, hemos enviado cerca de 60 comunicaciones que incluyen sugerencias o recomendaciones de seguridad explicando cómo manejarnos y poniendo en contexto la crisis mundial del COVID con las recomendaciones necesarias para que la gente en su casa las pueda aplicar con su familia. Estamos participando de reuniones virtuales con directivos, creamos escenarios optimistas, pesimistas, probables etc., también de corto y largo plazo tratando de ver cómo será el año 2021, haciendo planes de trabajo específicos de fuerza de ventas y otras áreas. Con el fin de proteger el empleo hemos identificado los gastos no necesarios y los hemos transferido al 2021 para tener flujo de efectivo para poder pagar a las pequeñas empresas a 30 días máximo. Me interesa que la economía funcione porque si no lo hace mi negocio también se verá afectado. Está claro que habrá una disminución de ingresos este año y tendremos que defender esta caída en las ganancias de la compañía buscando nuevas ideas incursionando en canales no explorados siempre en el sector privado. En este contexto no queremos actuar defensivamente queremos ser agresivos y buscar oportunidades que una crisis siempre ofrece. Hoy hay caos en el mercado, una distribución irregular de medicamentos en la forma de recibir productos del exterior y queremos poner orden a ese caos para lograr la "nueva normalidad".

EF: ¿ALFASIGMA es una compañía italiana, que rol tienen las filiales italianas en el exterior en seguir desempeñándose para mantener los logros de la casa matriz?

VDE: Somos muy importantes en esta fase, sobre todo por ser una compañía italiana que fue uno de los mercados más impactados. Casi el 50% de las ventas de la compañía vienen de Italia pero las compañías afiliadas se vuelven cada vez más importantes, el año pasado ALFASIGMA México fue la subsidiaria número uno y estamos por cumplir 10 años en México. La compañía se registró el 10 de Mayo y a mí me contrataron en Agosto del mismo año para lanzar el negocio e iniciamos operaciones en Julio de 2011. Hemos tenido un recorrido muy interesante y cada vez más las afiliadas jugaran un papel más importante en el desempeño y el desarrollo de esta organización ya que el mercado italiano le faltará fortaleza para seguir creciendo como en años anteriores y las empresas afiliadas le darán impulso a la empresa madre. Este año por primera vez el área internacional venderá más que Italia, nosotros en los últimos 3 años hemos estado en primer y segundo lugar de las internacionales aunque este año nos afectará la variable de proyección de la devaluación del 20% del euro que otros países no tendrán. Pero debemos ser positivos, el mundo está cambiando y los criterios también deben cambiar.