

*U.S. Commercial Service | U.S. Consulate General  
Sao Paulo, Brazil*

**Brazil Health IT Trade Mission 2014**  
*A Transformational Dialogue*

*Final Report*



# Brazil Health IT Trade Mission 2014



U.S. Health IT Trade Mission Delegation

U.S. Commercial Service Brazil

2014

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## Overview of the Health IT sector in Brazil

## Upcoming Health IT Trade Mission to Brazil – August 2015

# Health IT Trade Mission Overview



Official Delegation and Sponsors in Porto Alegre City Hall

The U.S. Commercial Service at the United States Consulate General in Sao Paulo organized the first-ever Health IT Trade Mission to Brazil September 15-18, 2014.

The mission helped U.S. health IT companies learn about the Brazilian health care market, facilitated U.S.-Brazil health care cooperation and showcased U.S. health IT solutions.

Over the course of the four-day event, which took place in Porto Alegre and Sao Paulo, nearly 200 Brazilian government policymakers, regulators, hospital CEO's and CIO's, health care practitioners and other industry officials gathered to hear from 10 leading U.S. health IT companies.



Consul General Dennis Hankins



Mayor José Fortunati - Porto Alegre Seminar

In addition to the two-city, two-day technology forum, the U.S. company delegates had the opportunity to participate in executive-level round table discussions, technical visits and business networking events.



Relation Building Dinner with Hospital CIOs in Sao Paulo

Deloitte, IBM and Oracle were the Platinum Sponsors and Cerner, Dimensional Insight and GE Healthcare were the Silver Sponsors of the four-day event.

Several leading innovative U.S. health IT companies such as Care.IT, Covidien, E\*Healthline and World of Wellness also participated in the program.

Major supporters of the event included the Brazilian Society for Health Informatics (SBIS), HL7 Brazil, Health 2.0, the Porto Alegre Health Care Cluster, the Porto Alegre Municipal Secretariat of Innovation, the Porto Alegre Municipal Secretariat of Tourism, the Hospital Syndicate of Porto Alegre and the Latin American Institute for Sustainable Economic Development.



Gala Cocktail Reception at Consul General's Residence



Hospitals CEO Roundtable, Porto Alegre

# Round Table with CEOs of Porto Alegre Health Care Hospitals



Enrico de Vittori and Carlos Alberto Fuhrmeister

The U.S. Health IT company delegates participated in a boardroom style round table with the CEO's of the four leading hospitals of Porto Alegre, which included Moinhos de Vento, Maes de Deus (both Joint Commissioned International Certified), Santa Casa and Sao Lucas.

The U.S. participants were able to engage in thought-provoking discussions and learn first-hand about the CEO's concerns and aspirations for their hospitals. The major themes covered the changing demographics of the region and chronic disease management; increasing hospital efficiency and productivity; the implementation of electronic health records (EHR), data privacy and big data; and workforce management and training.



## Round Table with DATASUS Directors

Dr. Augusto Gadelha, Director of DataSUS, the Brazilian Single Payer Health Care System health IT Office participated in an exclusive round table with the U.S. health IT companies. This was an opportunity for the delegation to engage in an in-depth conversation about the Brazilian Government's efforts to develop its health IT program. Dr. Gadelha gave a thorough overview of the state of the health IT system viewed by the government. He cited five areas, which he referred to as the "Five I's", that are driving government policies and the focus of investment. These included identification processes, interoperability, integration, infrastructure and information



# Business Networking Cocktail Reception, POA City Hall



Commercial Consul Everett Wakai at Porto Alegre City Hall

Commercial Consul Everett Wakai gave welcoming remarks during the cocktail reception at the Porto Alegre City Hall and took the opportunity to recognize the supporters and partners of the first ever U.S. health IT trade mission to Brazil.

In particular, he thanked the Porto Alegre Health Care Cluster, in his words, “a true partner throughout this endeavor”. He also recounted his first visit to Porto Alegre and the encouragement and support he immediately received from the CEO of Moinhos de Ventos, Fernando Torrely, the Secretary of Tourism, Luiz Fernando Moraes, the Secretary of Innovation (InovoPOA) Deborah Pilla and the President of the Latin American Institute for Sustainable Economic Development (ILADES) Marcino Fernandes.



Porto Alegre City Hall HealthCare Cluster Partners

## Business Networking Cocktail Reception, POA City Hall

Commercial Consul Everett Wakai added, "Thanks to their strong show of support, the mission to Porto Alegre was highly successful for the U.S. health IT delegation and the "Gauchos"", as the people of the region are called. He also commended the Porto Alegre Health Care Cluster for the important work it has accomplished in building the region into a health care center of excellence.



Porto Alegre Networking Reception



Welcome Remarks by Vice Mayor Sebastião Melo

Vice Mayor of Porto Alegre Sebastião Melo also offered warm words of welcome to the U.S. delegation and complemented both the U.S. and Brazilian participants for their interest and enthusiasm, which contributed to making this a memorable event. Fernando Torrely, CEO of Moinhos de Ventos Hospital shared with the guests the Porto Alegre Health Care Cluster's vision of building a leading health care center of excellence and continued interest in international cooperation.

# Background on Porto Alegre Hospitals



## ***Hospital Moinhos de Vento***

Hospital Moinhos de Vento is one of six hospitals in Brazil to be recognized as a Hospital of Excellence (Hospitais de Excelência) by the Ministry of Health and was the second institution in Brazil to become Joint-Commission International (JCI) Certified. It also has an affiliation agreement with Johns Hopkins Medicine International.

## ***Hospital Santa Casa de Misericórdia de Porto Alegre***

Santa Casa da Misericórdia de Porto Alegre is a private philanthropic institution and a Latin American reference in health care, research and teaching, with several nationally and internationally recognized publications.



## ***Hospital São Lucas da Pontifícia Universidade Católica***

As a teaching hospital linked to the university, Pontifícia Universidade Católica do Rio Grande do Sul, Hospital São Lucas is one of the biggest hospital complexes in Latin America, and a reference in surgical treatment for epilepsy, morbid obesity and Type 2 Diabetes treatment. The hospital is also part of the National Clinical Research Network in teaching Hospitals.



## ***Hospital Mãe de Deus***

Hospital Mãe de Deus is recognized with excellence by the National Accreditation Association (ONA) and is JCI Certified. The hospital is one of the fastest growing health institutions in the country. It is well-known for its expertise in oncology, as well as endovascular therapy and electrophysiology procedures.



## ***Hospital de Clínicas de Porto Alegre***

Hospital das Clínicas de Porto Alegre is a public teaching general hospital with excellency standards in about 60 specialties. It is one of the few public hospitals that is JCI Certified. The majority of patients treated at the Clinic subscribed to the Brazilian Unified Health System SUS (Sistema Único de Saúde).





## ***Hospital do Coração HCor***

Hospital do Coração HCor was founded in 1960s when the Sanatório Sírio de Campos do Jordão (SP) –which developed a specialization in treatment of tuberculosis. In 2006, HCor received Joint Commission International (JCI) accreditation.

## ***Hospital Israelita Albert Einstein***

The Hospital Israelita Albert Einstein (Albert Einstein Israelite Hospital) is one of the most important Brazilian hospitals. It was founded by the Jewish community of São Paulo in 1955. In 1999, it was the first health institution outside the United States to be accredited by Joint Commission International.



## ***Hospital Sírio Libanês***

The Hospital Sírio-Libanês (Syrian-Lebanese Hospital) is one of the most important hospitals in Brazil and South America. It was founded by the large Christian-Syrian and Lebanese community of São Paulo in 1921. It participated in the first tele-surgery in South America, in 2000.



## Relationship Building Dinner in Sao Paulo

The Relationship Building Dinner brought together the leading thinkers, Hospital CIO's, Federal, State and City Government policy makers, regulators and the U.S. health IT companies in a relaxing and intimate environment. The event gave U.S. and Brazilian guests an opportunity to make new acquaintances, reconnect with old contacts and reinforce existing relationships. It was a high point of the week that facilitated business-to-business and people-to-people diplomacy and encouraged the key healthcare stakeholders to discuss in an informal setting the major challenges, opportunities, concerns, hopes and solutions for the sector.



# Relationship Building Dinner in Sao Paulo



Everett Wakai (US Consulate), Marc Perlman (Oracle)



Mission Delegates



Mission Delegates



Relationship Building Dinner

# Gala Cocktail Reception at the U.S. Consul General's Residence

The Gala Reception at the U.S. Consul General's Residence was the capstone event to an intense week long trade mission. Over 150 guests attended the reception, which enabled U.S. companies to expand their networks and build their databases in a lively and social environment. Consul General Dennis Hankins gave welcoming remarks commending Brazil for the enormous progress it has made bringing millions of Brazilians into the middle class,



lowering the infant mortality rate and increasing the average life expectancy. He also underscored the many challenges our countries are faced with in the health care sector but noted that U.S. - Brazil cooperation was an important and positive step forward.

The invited guest speaker, Dr. Augusto Gadelha, Director of DataSUS, the Brazilian Single Payer Health Care System health IT Office spoke about

DataSUS' efforts to increase the use of health IT in the public payer's system and noted the importance of events like these to connect the key stakeholders to continue to innovate and bring valuable solutions to the market place.

He also said that while the U.S. and Brazil health care models are different, the progress and work the U.S. was doing in Health IT was an important resource and reference for Brazil.



# Gala Cocktail Reception at the U.S. Consul General's Residence



# Health IT Business & Technology Fora in POA and Sao Paulo

## Keynote Speakers

*Porto Alegre - Commercial Consul Everett Wakai and Mayor José Fortunati of Porto Alegre*

Commercial Consul Everett Wakai opened the event with a high level discussion about the important role health IT is playing in our societies today, from providing better health care to more citizens in a more sustainable manner to improving the quality of life. He also discussed the role of health care in unleashing innovation, stimulating new business opportunities, driving greater economic competitiveness and creating jobs of the future.



He shared with the audience some of the major programs and policies the U.S. has developed to drive down costs, improve outcomes and increase access such as Meaningful Use, Accountable Care Organizations and Blue button. He also described U.S. health diplomacy activities, which has included investments of US\$ 50 billion to ensure the poor and the underserved around the world have access to essential high quality services that are useful and affordable; he noted that eHealth and mHealth were part of the solution.

## Health IT Business & Technology Fora in POA and Sao Paulo



At the binational level, he mentioned that the U.S. and Brazil were working together on R&D in biomedicine and regulatory compliance for health care products. He closed with a call to action for continued U.S.-Brazil cooperation in the health care sector to improve the quality of life for citizens of both nations.

Mayor Fortunati's participation was a major highlight of the event and a testimony to his interest in and commitment to improving health care through technology, cooperation and best practices as discussed during the forum. He considered this an innovative initiative and commended the Porto Alegre Health Care Cluster, the Porto Alegre Secretariats of Tourism and Innovation for their participation and support of the event.



He cited this as another example of how cooperation between the City of Porto Alegre and the U.S. can lead to mutually beneficial business opportunities and strengthen the ties between the two countries.

# Health IT Business & Technology Fora in POA and Sao Paulo

## Keynote Speakers

Sao Paulo - Commercial Counselor Steve Knode, U.S. Consulate General Sao Paulo

Commercial Counselor Steve Knode, in his remarks chronicled his experience with health IT as a diplomat. Digital record keeping has a very real and personal impact. For years, his wife had diligently kept a record of their kids' vaccinations in a paper booklet, given to them by a pediatrician immediately after their children were born, over 10 years ago.



Commercial Counselor Steve Knode at Sao Paulo Business Technology Forum



Sao Paulo Business Technology Forum

Last year, when they went into a county community clinic near their home in Florida for some shots, the clinician on staff took their paper vaccination records and entered all their children's data into the state's digital record system. It has given them a great sense of relief to know that this important information is now stored digitally,

to help in future healthcare decisions and also as a key "backup". This is especially relevant since they have lived in five different countries over the last 15 years as part of the Foreign Service. For Mr. Knode, Health IT means better, more reliable and efficient care.



Commercial Counselor Steve Knode, Ministry of Health Dr. Adison França and Commercial Consul Everett Wakai

# Health IT Business & Technology Fora in POA and Sao Paulo

## Panel Discussions

### Rethinking the Health Care Delivery System



Dr. Adison França, Ministry of Health

In the last 25 years, universal access to healthcare has sharply increased Brazilian lifespans and slashed the infant mortality rate. Technology will play an increasingly important role in improving the quality of care in the future. Technology is helping to create efficient and flexible organizations that enable greater transparency and accountability for performance. It will continue to improve the quality and efficiency of healthcare while increasing the level of personalization for patients.

Finally, technology is reducing gaps in access to care and is helping individuals become advocates for their own health.

As the telecommunications network in Brazil expands to remote areas, telemedicine is providing distant clinics with access to specialists with whom they can consult on healthcare diagnoses and treatments.



Paul Dommel, IBM

Telemedicine has the promise of increasing access to care as well as improving the quality of care via second opinions and collaboration between experts in hospitals and clinic staff in the field. Data and analytics are increasingly available that help physicians to diagnose difficult cases and determine the best type of treatment.



Sean Elwell, Care.IT and Mariano Groiso, IBM

# Health IT Business & Technology Fora in POA and Sao Paulo

## Rethinking the Health Care Delivery System



Paulo Banevicius, GE HealthCare

Technology will also empower healthcare consumers. It will provide information on physician and facility quality and provide consumers with insights to maintain and improve their own health. As millions more Brazilians enter the middle class, an increasing number of households will have two or more people working outside of the home. These households will turn to faster, less healthy food options. Access to information on disease prevention, healthy eating, and exercise will help to slow the growth of obesity and increases in chronic disease.

Finally, better health records inside of hospitals and provider networks will improve the quality of care and increase hospital efficiency. Practitioners will have access from anywhere at any time to information about individual patients, their treatments, and health status. Better health systems will allow instant sharing of test results and diagnostic images. These capabilities will result in better care for patients inside and outside of hospitals. Over time, greater coordination with community service partners like visiting nurses, food banks, and transportation organizations will reduce readmissions and enable fragile elderly and vulnerable people to live longer in their homes and communities, reducing the need for admission to expensive long-term care facilities.

Comments by Paul Dommel, Global Lead for Government Health and Social Programs, IBM.

## The Health IT Return of Investments (ROI)



Istvan de Camargo, Health 2.0

The discussion from this panel revolved around the premise of the ROI on Health IT. There was a common consensus that there are different types of ROI – not just the monetary. From a monetary standpoint gaining ROI can take several years.

# Health IT Business & Technology Fora in POA and Sao Paulo



Naomi Melwin, World of Wellness

Gaining ROI by means of quality improvement, outcomes measurement, and connectivity happen over time as well but may be greater than that of the straight financial ROI.

Through the achievement of interoperability and data management, organizations, cities and governments can gain better insight into outcomes and populations that in the long run will increase the financial ROI.



Altino Leitão, ANS



Lincoln Moura, IMIA

Dr. Moura asserted that the investment into IT solutions must have a clear strategy and that strategy must have realistic goals and understanding of what ROI is. It must be understood that IT innovation and utilization will have multiple iterations and is a long term strategy. It must be viewed with patience and willingness to redefine over time.

A word from the moderator: "It was a true honor and pleasure to be a part of this mission. I do believe that Brazil has much opportunity but they must not sell themselves short on their current efforts in Healthcare and Healthcare IT. They are putting the pieces together to form a great foundation, while also knowing and understanding the potential obstacles they may encounter. I think there is great opportunity for the U.S. and Brazil to become great partners in improving healthcare through information and data as well as shared experiences. I look forward to future missions."

Comments by Nora Lissy



Nora Lissy, Dimensional Insight

# Health IT Business & Technology Fora in POA and Sao Paulo

## Big Ideas for the Health Care System



Abraham Miranda, American Embassy

Dr. Abraham Miranda, the Health Attaché at the U.S. Embassy in Brasilia, gave an overview of the Affordable Care Act (also referred to as Obamacare), HITECH Act, Meaningful Use and some of the drivers and trends in the U.S. health care system.

Heloisa Helena Corral from the Sao Paulo City Health Secretariat presented the City's health IT program an integrated health system called SIGA, which was developed to reflect the diversity of the region. Since 2004, the system has been uploading Sao Paulo citizens' personal health record data into the Brazilian Federal Ministry of Health registry in efforts to build a more interoperable and comprehensible national health IT system. One of the challenges noted in increasing the use of health IT is that many clinics and physicians in Brazil do not have computers so all data must be transcribed from paper into the IT system.



Heloisa Helena Corral, Sao Paulo City Secretariat of Health



Jesus Maria Diaz, Oracle

Dr. Jesus Maria Fernandez Diaz, from Oracle described one approach Spain is using to address the high level of chronic disease, which has included preventative care, patient flow management and a multi-channel system called OSAREN.

Dr. Mark Snyder of Deloitte noted that the electronic medical record (EMR) bridges the digital with the post-digital world and described the four forces that are combining to change healthcare: analytics, population health, mobility and patient engagement.



Mark Snyder, Deloitte

# Health IT Business & Technology Fora in POA and Sao Paulo

## Challenges for the Health Care System

This panel discussed many of the challenges health care systems are faced with as well as some of the solutions some states and the private sector are implementing.



Marc Perlman, Oracle



Dr. Marcio Bicyk, Sao Paulo Secretariat of Health

Dr. Marcio Bicyk do Amaral from the State of Sao Paulo Health Secretariat explained how the State's health portal, Portal SES, was being used to bring together citizens, administrators and health care professionals. He concluded that the major challenge and focus was increased interoperability.

Enrico Moraes de Vettori from Deloitte remarked that productivity is one of the biggest challenges for the healthcare system in Brazil. He added that the industry needs to become more patient-focused and increase work force training while citing innovation as a solution.



Enrico Moraes, Deloitte



Paul Dommel, IBM

Paul Dommel from IBM noted that the global challenges we are being faced with are budgetary, technological, an aging population, a lack of resources and fraud.

Dr. Rogério Sugai of Oracle cited data integration as crucial to solving regulatory issues and developing a more comprehensive patient profile. As he said, "There is an ocean of data and a desert of information..."



Rogério Sugai, Oracle

# Health IT Business & Technology Fora in POA and Sao Paulo

## Entrepreneurialism and New Business Models in the Health Care Sector



During this panel, Fabiano Hessel of GE Healthcare explained how the ultrasound second opinion system is dependent on data compression technology.

Paul Dommel from IBM discussed capacity for acute care and volume based reimbursement in contrast to value based reimbursement with a focus on outcomes, and how measurement of quality can be used to support outcomes.



Paul Dommel, IBM



Enrico Moraes, Deloitte

Enrico Moraes De Vettori from Deloitte talked about governance, incentives, sustainability, focus on patient and the need for scale to survive in the context of health care entrepreneurialism.

# Health IT Business & Technology Fora in POA and Sao Paulo

## *The Health IT Costs Benefits Equation*



Luis Gustavo Ladeira, Cerner

Luis Ladeira of Cerner opened the session highlighting the five major trends that will drive costs and in turn transform the health care equation leading to increase benefits: population health, personalized medicine, evidence based medicine, medical tourism and an aging population.

Kwabena Nantwi from E\* Healthline discussed what is needed in the sector for health IT to be successful and create value. He outlined the six core functions required for health IT to advance: Integration, interoperability, intelligence, sociability, and outcomes engagement.



Kwabena Nantwi, E\*HealthLine



Luis Gustavo Kiatake, SBIS

Luis Gustavo Kiatake from the Brazilian Health Informatics Association (SBIS) demonstrated the value of the EHR, with a case study of a Brazilian medium-sized hospital that could attain a positive ROI in less than 3 years with health IT. He also described SBIS' efforts to develop the market and establish a benchmarking system to ensure continued quality improvement through the SBIS EHR certification program citing 23 SBIS certified systems to date.

# Overview of the Health IT sector in Brazil

The Brazilian Health Care sector is one of the largest and fastest growing markets in the world. According to industry analysts, Brazil spends and invests approximately 9 % of its GDP annually on health care. The country has 7,000 hospitals, 70% of which are privately owned. Medical equipment and pharmaceutical imports continue to grow at more than 10% a year. Companies are also expanding into sectors such as primary care assistance, prevention, home care and treatment of rare and chronic diseases. At the same time, the Brazilian Government has been promoting its public private partnership model as a means to increase access, reduce imports and develop its own healthcare industry.



The Unified Health System (Sistema Unico de Saude - SUS) is Brazil's public health care system that offers free universal health care coverage and is considered the largest in the world of its kind. Productive Development Partnerships (PDP) have enabled international companies to supply the public segment with high technology products for complex healthcare treatments. Also, given the increase in GDP per capita and disposable income over the past decade, foreign investors have entered the private health insurance sector as demand for more sophisticated services and medical treatment grow. International companies have also acquired some of the largest Brazilian pharmaceutical, medical equipment and drugstore businesses.

Changes in Brazil's demographic makeup, resulting from a drop in infant mortality and birth rates, an increase in life expectancy and an aging population have placed new demands on the health care system. Under the direction of the Brazilian Ministry of Health, SUS has developed a strategy to address the growing challenges of guaranteeing free universal health care while managing soaring treatment costs, complex and chronic diseases and epidemics. DataSUS, the IT Office of SUS, was created in 2011 and charged with implementing this strategy through the use of health IT. One of the key priorities for DataSUS has been the development of a National Health Registry that will identify the user, health care providers and health care facilities in efforts to analyze, control and manage treatments and productivity.

This office has also developed e-SUS, a program designed to restructure and guarantee the interoperability of all IT systems used by SUS hospitals, clinics and other health care facilities. This includes the development and integration of a number of health IT software applications and solutions to monitor the health of all citizens through the use of a National Health Card (Cartão Nacional de Saúde). It's e-SUS AB is used for primary care to identify users, schedule appointments and purchase medication. It has also developed an electronic health record (EHR) and Hospital Information System (HIS) called e-SUS Hospitalar. Within these solutions, a number of modules exist for immunization control, family planning and pregnancy, chronic disease, breast cancer, dental care and monitoring of absent patients.



Two phenomena in the IT sector make Brazil ripe for health IT solutions. Firstly, Brazilians are avid users of connected devices and have become the biggest users of social media in the world. Secondly, the success of the Brazilian electronic banking system is important indicator that Brazil is well positioned and capable of adopting e-health technologies and practices.



# Health IT Business Development & Technology Mission Brazil - August 17-20, 2015

## ► The Mission

The U.S. Commercial Service at the U.S. Consulate General in Sao Paulo is pleased to announce the Health IT Business Development and Technology Mission. This high impact business centered mission is designed to help U.S. health IT companies build their business in one of the world's largest health care markets.

## ► The Program

1. Learn first-hand about Brazil's emerging health IT market, policies and business opportunities
2. Showcase your company's technology to senior-level public and private health care officials and potential partners
3. Access and network with Brazil's health IT policy makers, thought leaders and entrepreneurs
4. Contribute to the development of a big emerging market

## ► Why Brazil?

Brazil is the seventh largest economy in the world, representing 55% of South America's GDP. It is considered the economic engine of South as it continues to bring millions of Brazilian into the middle class raising the per capita disposable income. At the same time Brazilians are avid users of connected devices and have become the biggest users of social media in the world. The country has one of the world's largest and fastest growing healthcare markets, investing nearly 9% of its GDP annually in health care services, products and technology solutions.

Soaring treatment costs, a growing rate of chronic disease, universal coverage and quality care improvement policies are driving demand for greater healthcare efficiency and productivity. Health policymakers, administrators, industry stakeholders and practitioners are looking to health IT as part of the solution. The Brazilian public is also demanding e-health solutions as part of the health care offering. According to an Accenture study, 90 percent of Brazilians believe e-health resources are important while 70% would consider opting for a health care provider that offers EHR/PHR solutions.

## Here's What Our Clients Are Saying:

*"The US Commercial Service consistently shortens the distance from concept to implementation enabling purposeful dialogue with the leading thinkers in the Brazilian health care space."*

**Paul Dommel, Global Sales Executive, IBM Corporation**

*"The access to key decision makers and influencers and the first-hand perspective have been invaluable in better understanding the Brazilian health IT market"*

**Marc Perlman, Global Vice-President, Oracle**

*"The Commercial Service Health IT Missions always provide insight and value for us - I would highly recommend participation in the upcoming Brazil mission to any U.S. company wanting to expand its reach into the Brazilian market"*

**Ross Stoddard, Latin America Sales Director, Cerner**

*"Last year's US Commercial Service Health IT Trade Mission to Brazil enabled us to engage in high quality discussions with potential clients and increase our partnership network of health IT companies."*

**Enrico De Vettori, Partner Deloitte**

## Participation Fees

<b>\$ 2450</b>	SME's
<b>\$ 2875</b>	Large Companies
<b>\$ 875</b>	Per Additional Participant

Register at: <http://1.usa.gov/1HcEG1V>

### For more information: U.S. Commercial Service



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# Brazil Health IT Trade Mission 2014

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