DIGITAL HEALTH IN THE GLOBAL SOUTH
Trends & overview

Global South eHealth Observatory, Pierre Fabre Foundation, 1 July 2022

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DHP
DIGITAL HEALTH PARTNERSHIPS

AeHIN

COVID-19: world's first 'digital pandemic'

+79% increase
in global digital health investments around the world between 2020 ($32 billion) and 2021 ($57 billion)

$220.16 billion
Value of **global digital health market** in 2021
Expected to reach over **$551.09 billion** by **2027**

+50 countries
worldwide have been leveraging **data-driven tracking, forecasting and response initiatives** through Covid-19

14.5% (pre-covid) **vs. 21.8%** (post-covid)
Global telehealth market (expected) growth rate

The acceleration of digital health is reflected in some significant moves from multilaterals and institutions

Digital Health Strategy finalized by Q2/Q3 2022

Working on a **digital health strategy, increased funding and autonomy**

Africa Digital Health Blueprint in 2022/2023

WHO Africa – released **framework for successful implementation of the WHO Global Strategy on Digital Health** in August 2022

Global Strategy on Digital Health 2020-2025
WHO Berlin Hub for Pandemic and Epidemic Intelligence

Digital Health Framework Q2 2022

Declarations for Digital Health

PRIDA - Policy and Regulation Initiative for Digital Africa (ITU, African Union, EU) and **Digital4Development** (D4D) **Hub**

"Greater collaboration on data standards and platforms could also increase the utility of testing data so that results can be linked to surveillance systems, clinical care and public health responses for control, tracing and isolation"
G7 – June 2020

Increased institutional funding

'It is estimated that **$6bn** over **2024-2026** will be from **Global Fund** investments to **reinforce health systems** and this includes data systems'

The EU, GIZ, Enabel, JICA, USAID & the WB are ramping up their digital health activities and funding streams for Asia and Africa

The **European Commission** has funded **95%** of the **PRIDA** (Policy and Regulation Initiative for Digital Africa) and is increasing its funding for digital health

Multiple large private foundations are involved **in large-scale initiatives to develop digital health** in Asia and Africa.

Healthcare Electrification and Telecommunication Alliance launched in April 2022

USAID matching fund - A **non-profit alliance** gathering **donors & private sector**
Aim to connect and bring energy to **10,000 health facilities** across **20 sub-Saharan African countries** over the next **8 to 10 years**

Align to **country strategies** & coordinate between **investors**

Principles of Donor Alignment

Multiplicity of players contributes to fragmentation

Increased coordination needed

Emerging mechanisms, governance bodies & alliances illustrating the imperative need for more cohesion

Examples of emerging coordination mechanisms

Transform Health

Global coalition committed to **achieving UHC in LMICs** via digital health
1. Advocate for more **political leadership**
2. A global **data governance framework**
3. Advocate for Increased **Investments**

*Recently launched **digital health network for West Africa** (with SpeakUp Africa & Baobab Institute)*

DICE (Digital Health Center of Excellence) works with **governments** to **coordinate** between **donors** and **development partners**

I-DAIR

International collaborative to improve **research** on digital health and **artificial intelligence**

DCCC Digital Connected Care Coalition

Provide a **collaborative platform** for **private sector** with **civil society** and **governments** for digital health in LMICs

gdhub

Geneva Digital Health Hub

Federate knowledge and stakeholders for **coordination, governance, impact** for digital health in LMICs

Established coordination mechanisms

OpenHIE

CWCDH COMMONWEALTH CENTRE FOR DIGITAL HEALTH

AeHIN Asia eHealth Information Network

HELINA HEALTH INFORMATICS IN AFRICA The Pan African Health Informatics Association

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AFRICA

Innovation booming, investments on the rise

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Innovations from Africa cross-fertilized to Europe & Asia

sormas

The *Surveillance Outbreak Response Management and Analysis System* (SORMAS)
Implementing countries **before COVID-19** : **Nigeria,** then **Ghana**
Fertilized and deployed **during COVID-19** in **Germany**, **France**, **Switzerland**, **Afghanistan**, **Papua New Guinea, Fiji**

Increased number of new players in Digital Health

1276 health-tech start-ups in 2022

Big 4

companies
< 10
11 - 50
51 - 100
100 - 200
> 200

Source: Salient Advisory

Investments in African digital health startups

Investments in health-tech start-ups in Africa grew by **81%** in 2021 but represent **only 10%** of total startup funding

Healthtech Hub Africa

launched in 2021 by Norrsken & Novartis Foundation (Rwanda)

Examples of digital health startups fundraising in 2022

mPharma

$65m

ROCKETHEALTH
TELEMEDICINE | LABORATORY | PHARMACY

$5m

RelianceHealth

$40m

<norrsken>

NOVARTIS | The Novartis Foundation

HEALTHTECH HUB AFRICA

Connecting the unconnected: a continued challenge

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Affordability

The affordability ranges widely across Africa. As a percentage of GNI per capita, the cost of 1GB of cellphone data ranges from **21% in** DRC **to 0.5%** in Egypt.

Coverage

- **46% of Sub-Saharan Africa population have mobile subscriptions**

- **Usage gap : 53% of Subsaharan Africa (1/2 billion pp)** not using mobile internet

- **Coverage gap : Only 26%** of rural dwellers use the Internet regularly (vs 47% urban)

Largest coverage gap is in Sub-Saharan Africa

Connectivity by region*
Percentage of individuals using the Internet in 2021

33%	81%	66%	61%	82%	87%
Africa	Americas	Arab States	Asia-Pacific	CIS	Europe
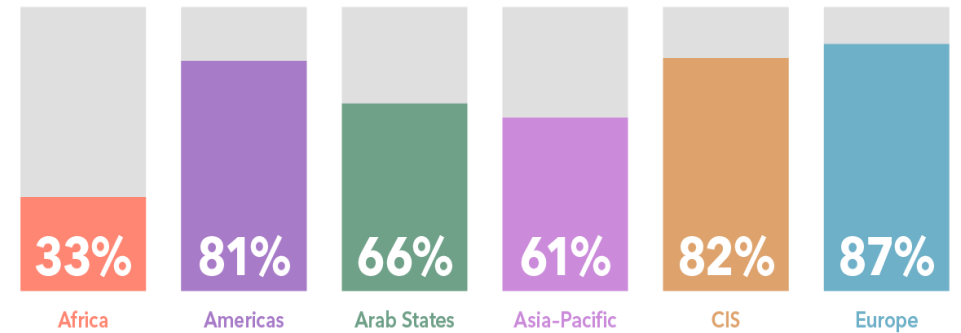
Source : ITU, *Facts and Figures 2021*
*ITU regions

ITU

Source: https://www.itu.int/itu-d/reports/statistics/facts-figures-2021/

Africa Digital Health– Maturity & Data Governance

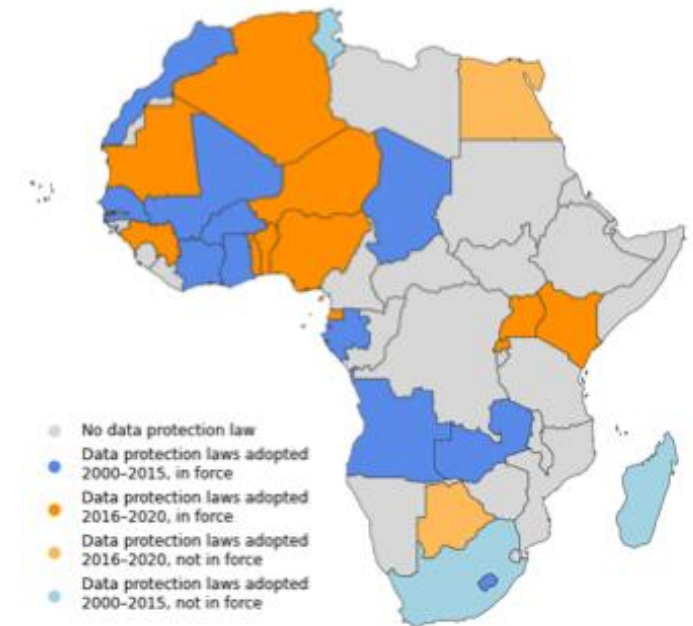## Only few countries have implemented their Digital Health strategy

Countries with a digital health strategy

Countries with a digital health strategy implemented

Cabo Verde; Cote d'Ivoire; Ethiopia; Ghana; Kenya; Mauritius; Rwanda; South Africa; Tanzania; Uganda; Zambia; Zimbabwe

*"In December 2020, **thirty-four** Member States of the WHO African Region developed digital health strategies. However, **only 12 of them have implemented** these strategies." WHO Africa*
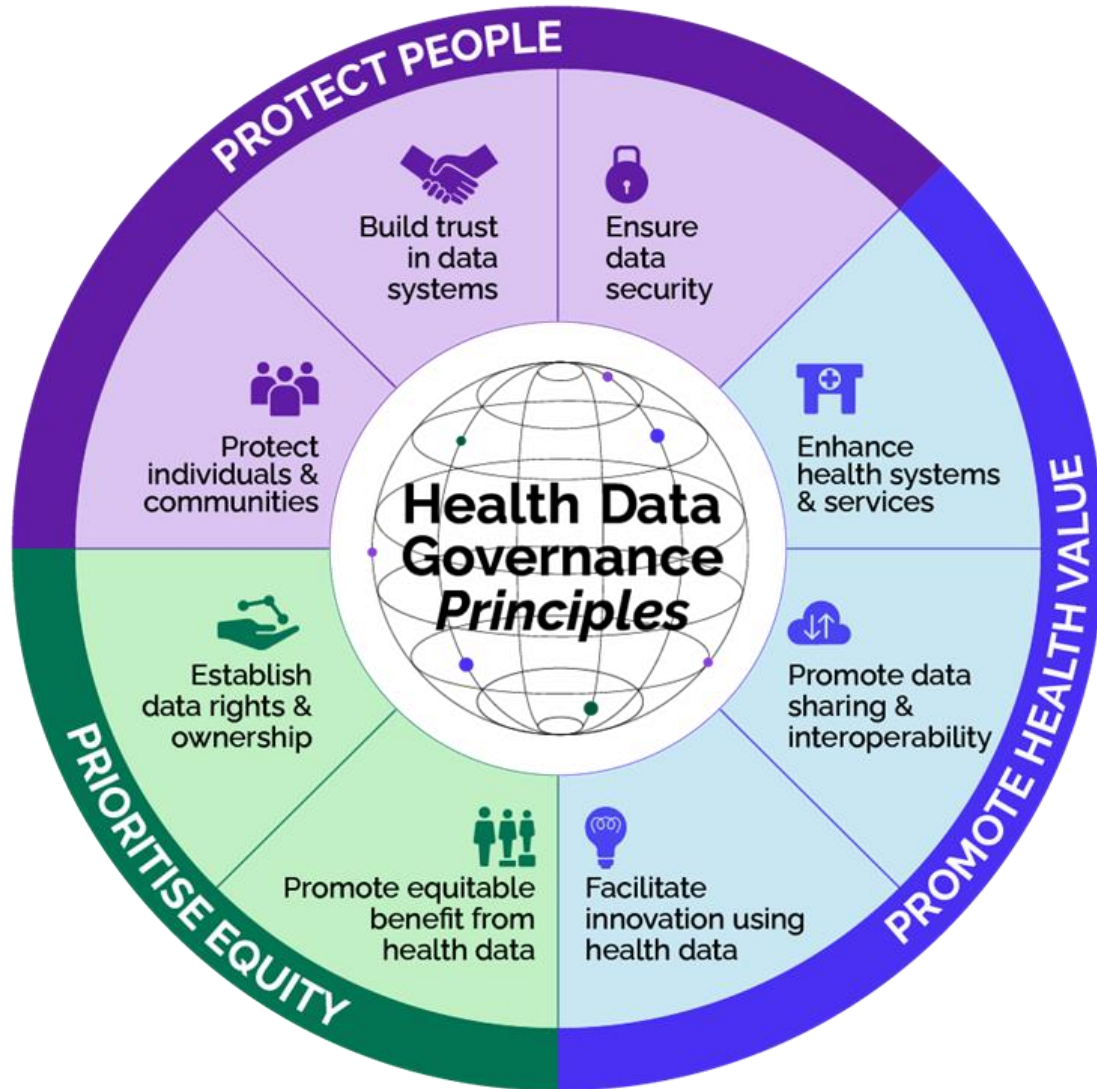
Data governance: Enforcement still a challenge

More than **half of all African countries** (31/55) have passed legislation regulating **data governance**, as of August 2021, but **enforcement remains a challenge**

No data protection law

Data protection laws adopted 2000-2015, in force

Data protection laws adopted 2016-2020, in force

Data protection laws adopted 2016-2020, not in force

Data protection laws adopted 2000-2015, not in force

Health Data Governance Principles
Universalizing the benefits of health digitalization

The Health Data Governance Principles:

- Bring a **human rights** and **equity** lens to the use of data within and across health systems.

- Are oriented towards supporting sustainable and resilient public health systems that can deliver **Universal Health Coverage (UHC)**.

- Aim to strengthen national and regional health data governance approaches, **maximising the public value** of health data **whilst protecting individual rights**.

- Align policymakers and other stakeholders around a **shared vision of equitable health data governance**, where all people and communities can share, use and benefit from health data.

- Recognise and build on existing norms, principles, treaties, conventions and guidelines, while further **strengthening the health data governance ecosystem**.

- Are a critical step towards a **global framework** for health data governance.

Launched by the Transform Health Coalition on April 7, 2022

Source: https://healthdataprinciples.org/principles
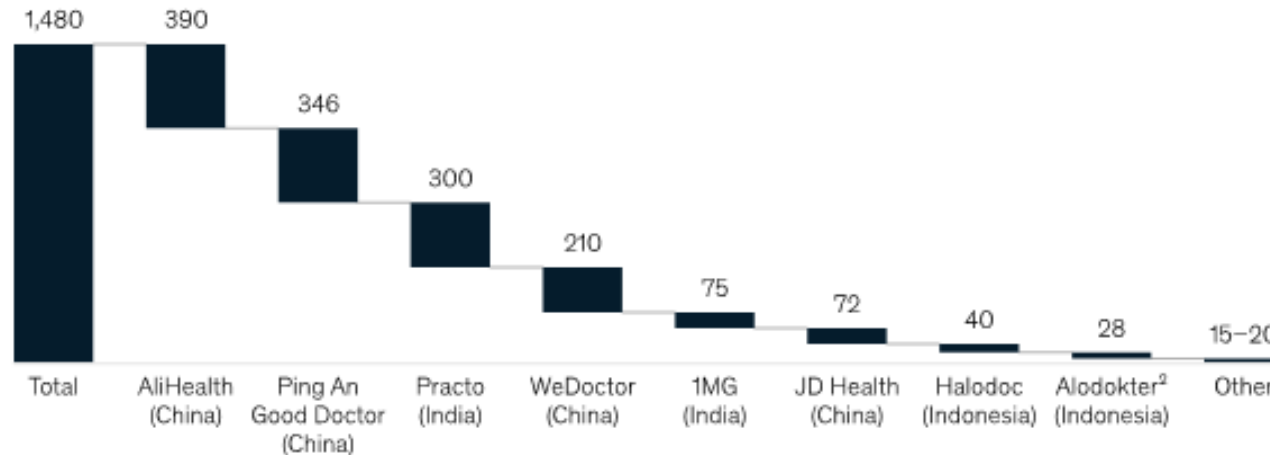
ASIA

Digital Health in Asia – Rise of Ecosystems

➢ Consumer-centric digital health ecosystems forming across Asia at unprecedented speed and scale

➢ Patients are increasingly preferring a single touchpoint to coordinate their healthcare needs

➢ Asia has fewer doctors attending to about 1,000 people when compared to the average count in OECD countries

By 2025

➢ Asia will be home to 456 million seniors aged 65 or older, representing 10 % of its population who will lift the demand on health services further

➢ Digital health in Asia estimated to create up to $100 billion in value up from $37 billion in 2020

Emerging health ecosystems already impact more than one billion lives in Asia.

Millions of registered users in 2020 across emerging health platforms[1]

Total	1,480
AliHealth (China)	390
Ping An Good Doctor (China)	346
Practo (India)	300
WeDoctor (China)	210
1MG (India)	75
JD Health (China)	72
Halodoc (Indonesia)	40
Alodokter[2] (Indonesia)	28
Other	15–20

[1]Does not account for user overlap.
[2]Number of monthly active users (MAU).
Source: 1MG; AliHealth; Alodokter; Halodoc; JD Health; Ping An Good Doctor; Practo; WeDoctor

Four emerging archetypes of health ecosystems

➢ Broadening access to primary care

➢ Improving health and wellness

➢ Expediting access to acute care

➢ Managing and monitoring disease

Source: The future of healthcare in Asia: Digital health ecosystems - McKinsey & Company, July 2021

Digital Health in Asia – Investments & Expenditure

Asia hailed as the world's fastest-growing healthcare market

Governments in Asia, spend only 4.5 % of their GDP on an average for healthcare

Governments are the dominant payer in Asia, accounting for 64% of all health expenditures in 2018

Half of the global Internet users are found in Asia

As of 2020, Asia comprises 44 % (about $6 billion of the $14 billion) global venture capital/private equity investments in digital health

Consumers are spending more on health and wellness and increasingly demand access to convenient, affordable care

Finding ways to control the growth of healthcare expenditures remains an urgent public priority even while prioritizing quality and access for patients.

Source: The future of healthcare in Asia: Digital health ecosystems - McKinsey & Company, July 2021

Diversity of Asia is reflected across multiple facets

Purchasing Power	Language
Culture & Norms	**Healthcare Systems**

73% of participants indicated that identifying and characterizing the right set of customer needs is a key challenge to scaling

55% of participants highlighted that the inability to translate PoC to commercial adoption is a key challenge to scaling regionally

Source: Scaling Digital Health Innovation in Asia - ACCESS Health International

Digital Health in Asia – Regulatory Sandboxes
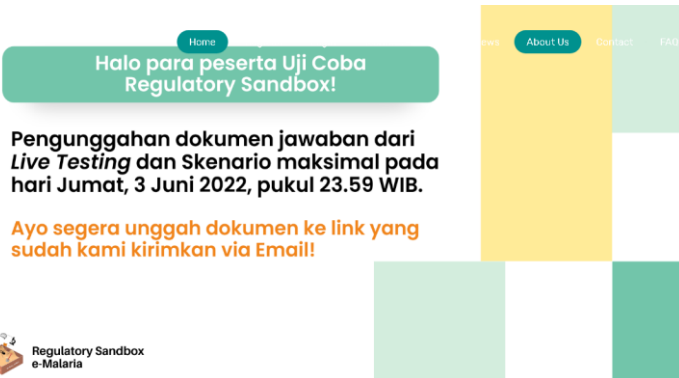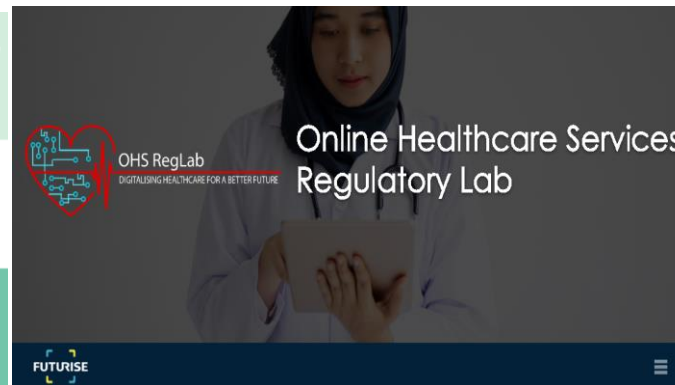## Creating a "safe space" to promote, test innovations in countries

Licensing Experimentation and Adaptation Programme (LEAP) Singapore

Ayushman Bharat Digital Mission Sandbox Environment India

e-Malaria Regulatory Sandbox Indonesia

Online Health Service Regulatory Lab Malaysia

- ❖ Regulations can conflict with innovation often taking years to enact the necessary legal amendments
- ❖ Government support is identified as a critical factor to foster healthcare technology sector innovation
- ❖ Regulatory sandboxes provide controlled testing environments for digital solutions
- ❖ New technologies/innovative applications can be demonstrated with the approval of regulatory authorities as a proof of concept (PoC)
- ❖ Evidence obtained from PoC may facilitate early adoption
- ❖ Governments can balance innovation and risk while also ensuring that regulations keep pace

Digital Health in Asia – Maturity

AeHIN's **"Mind the GAPS"** survey and assessment is in progress with preliminary response from 13 countries in the region

G – **Governance A** – **Architecture P** – **Program Management S** – **Standards & Interoperability**

AeHIN is a regional partner for HealthEnabled's ongoing review and redesign of the Global Digital Health Index (GDHI) and Maturity Model

With standardized digital health indicators like GDHI
➢ countries can assess their maturity in digital health, benchmark themselves against other countries and
➢ track historic progression in key digital health performance indicators at national and global levels

Countries engaged in review & redesign of GDHI:

| Early adopters (since 2018)	New (2022)
Indonesia	Bhutan
Lao PDR	Cambodia
Malaysia	
Philippines	

❖ National digital transformation in health is complex

❖ Capacity constraints in MoH to manage programs (multiple simultaneous digital health projects)

❖ Multi-sectoral coordination holds the key for consensus-building and longer-term sustainability

❖ Standards, when adopted by all stakeholders, enables interoperability

Source: Asia eHealth Information Network (AeHIN)

Digital Health in Asia – AeHIN's Convergence Workshops

➤ Establish a multi sectoral coordination mechanism for the national digital health mission with MoH as the lead agency with the rest as supporting partners

➤ All stakeholders converge their efforts and support the operationalization of national digital health strategy
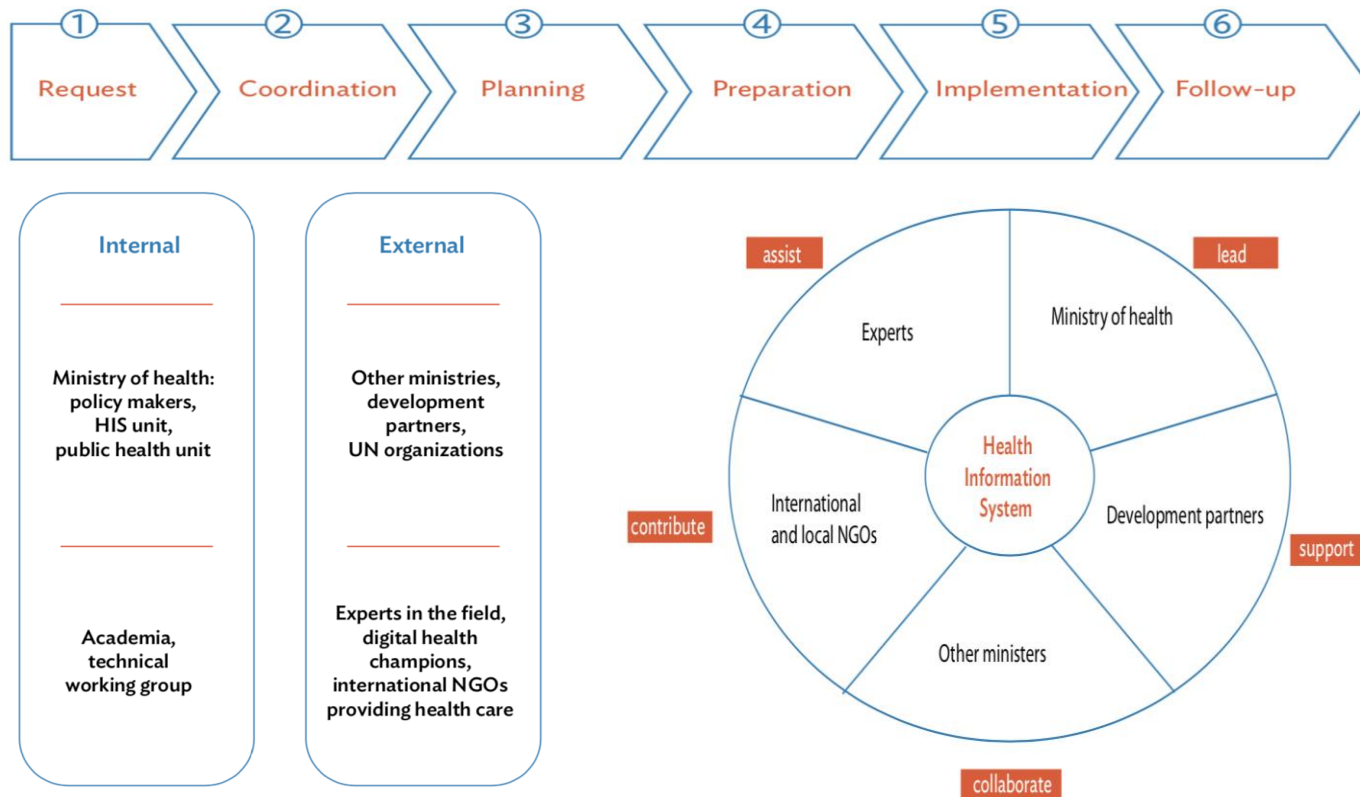
AeHIN has been assisting MoH in countries to convene convergence workshops and support follow-up activities

1. Myanmar
2. Bhutan
3. Indonesia
4. Viet Nam
5. Timor Leste
6. Nepal
7. Lao PDR

Source: Digital Health Convergence Meeting Tool Kit, Asian Development Bank (ADB)

AeHIN Goals

Stronger
Networking

Collaborative
Knowledge Creation,
Co-Created Publications

More
Peer-to-Peer
Exchanges
(Learning, Sharing
and Support)

Encourage **COOPERATION** -> Enable **COLLABORATION** -> Ensure **COORDINATION**->

Endeavour **CONVERGENCE** -> Experience **COHERENCE**

Global perspectives: priority key challenges

Need for more coordination & governance
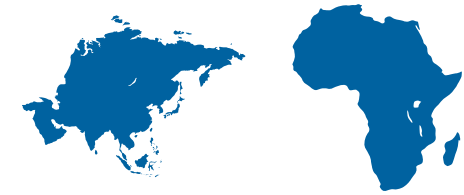
Need for more government leadership

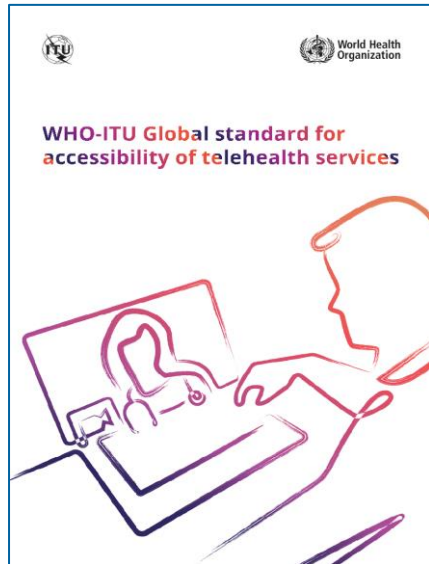**Need for more capacity building**

Push for Internet for all

Increased emphasis on equity and inclusion

Equity and inclusion-strong trend for digital health

Reports

WHO-ITU Global standard for accessibility of telehealth services

Growing up 2030 in a digital world
GOVERNING HEALTH FUTURES
THE LANCET & FINANCIAL TIMES COMMISSION
#GHFutures2030

Working Group Report on Virtual Health and Care

The Future of Virtual Health and Care
Driving access and equity through inclusive policies
June 2022

BROADBAND COMMISSION
FOR SUSTAINABLE DEVELOPMENT

*"If we want a world where **equity is a reality**, not an aspiration, we must [...] **harness the power of science, data, and digital** technologies."*

Dr. Tedros A. Ghebreyesus, WHO Director-General, January 2022

Hot topic

"Digital healthcare can be a catalyst for greater health equity".
WEF, 2022

HEALTHCARE
How Digital Health Can Help Address Issues Of Equity And Access In Behavioral Health

Seth Joseph Contributor
I write about the intersection of health care, technology and policy
May 31, 2022, 02:09pm EDT

Digital health coalition advocates for health equity
Naomi Diaz - Tuesday, May 24th, 2022

HEALTH AND HEALTHCARE
6 ways countries are driving health equity and access with virtual solutions

Health equity: A framework for the epidemiology of care

Thank you! Let's get in touch

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in Digital Health Partnerships