Digital Health Readiness in Asia Pacific

Is Asia prepared for the next pandemic?

Digital Health Landscape in Asia Pacific

COVID-19 has galvanised health systems across the globe to change the way they operate. At the forefront of this change is how digital tools can be leveraged to provide enhanced, personalised care for patients.

The HIMSS Insights: APAC Digital Health Trendbarometer Report 2021¹ provides some key findings for the APAC region.



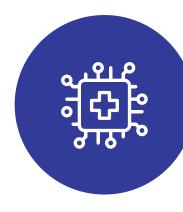
Top priorities for organisations telehealth, remote/ virtual care and enterprise adoption/ upgrading of EHR/ EMR systems.



75% expect improvement in business expectations for digital health in the region.



>50% of organisations struggle to find skilled employees and funding.



Singapore, South Korea and Australia are the top 3 role model countries for digital health.



Most healthcare professionals felt that there will be improvement in digital health innovation and investment in 2021.



87% ranked IT security and data privacy as their main priorities in the next 12 months.

digital health solutions. We must reimagine our regulatory approach to accommodate the shorter timelines and iterative nature of software development.

Fit For Purpose Regulatory Policies

Development of tailored, risk-based software regulatory frameworks will enable greater access to software innovation, better use of limited regulatory resources, and ultimately drive us to the next

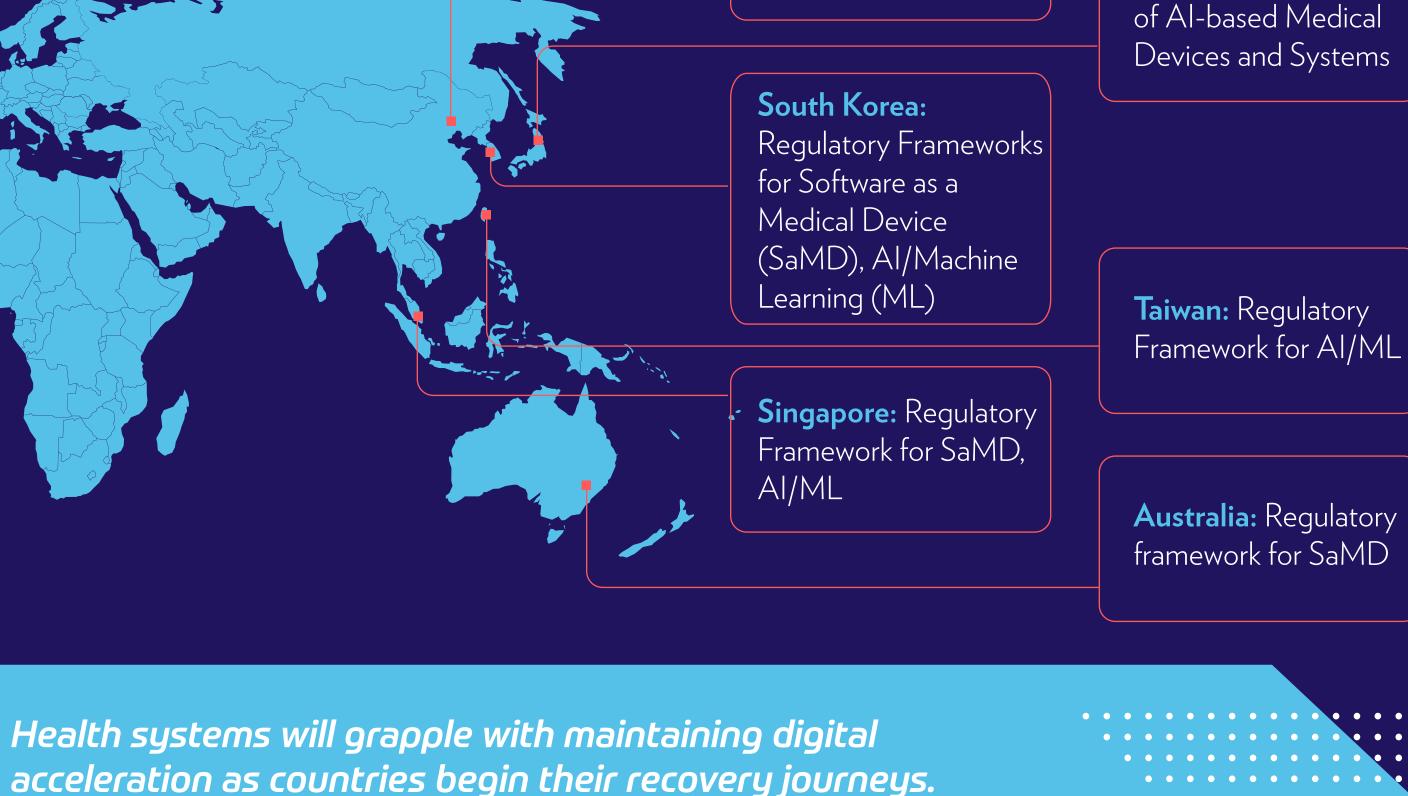
generation of personalised healthcare with more informed health decisions and improved patient

The current regulations do not fit the fast-paced innovation that characterises software and

outcomes. In addition, regulatory convergence across APAC will ensure greater consistency and predictability in regulatory review processes. This is essential to deliver safe, effective and innovative digital health solutions swiftly to patients and healthcare professionals².

Current Digital Health Regulation in APAC China: Regulation of Software Using Deep

Learning Techniques



Challenges to Adoption Having a skilled workforce to use digital tools took the lead as one of the biggest challenges, followed by funding and costs involved with workforce development and adoption of digital health technologies. By Region

As the arrival of COVID-19 has taught us, digital health

policy readiness at a national level demands urgent

attention as future pandemic readiness is assessed.

Other

50%

Japan: Regulation

Sufficiently skilled employees

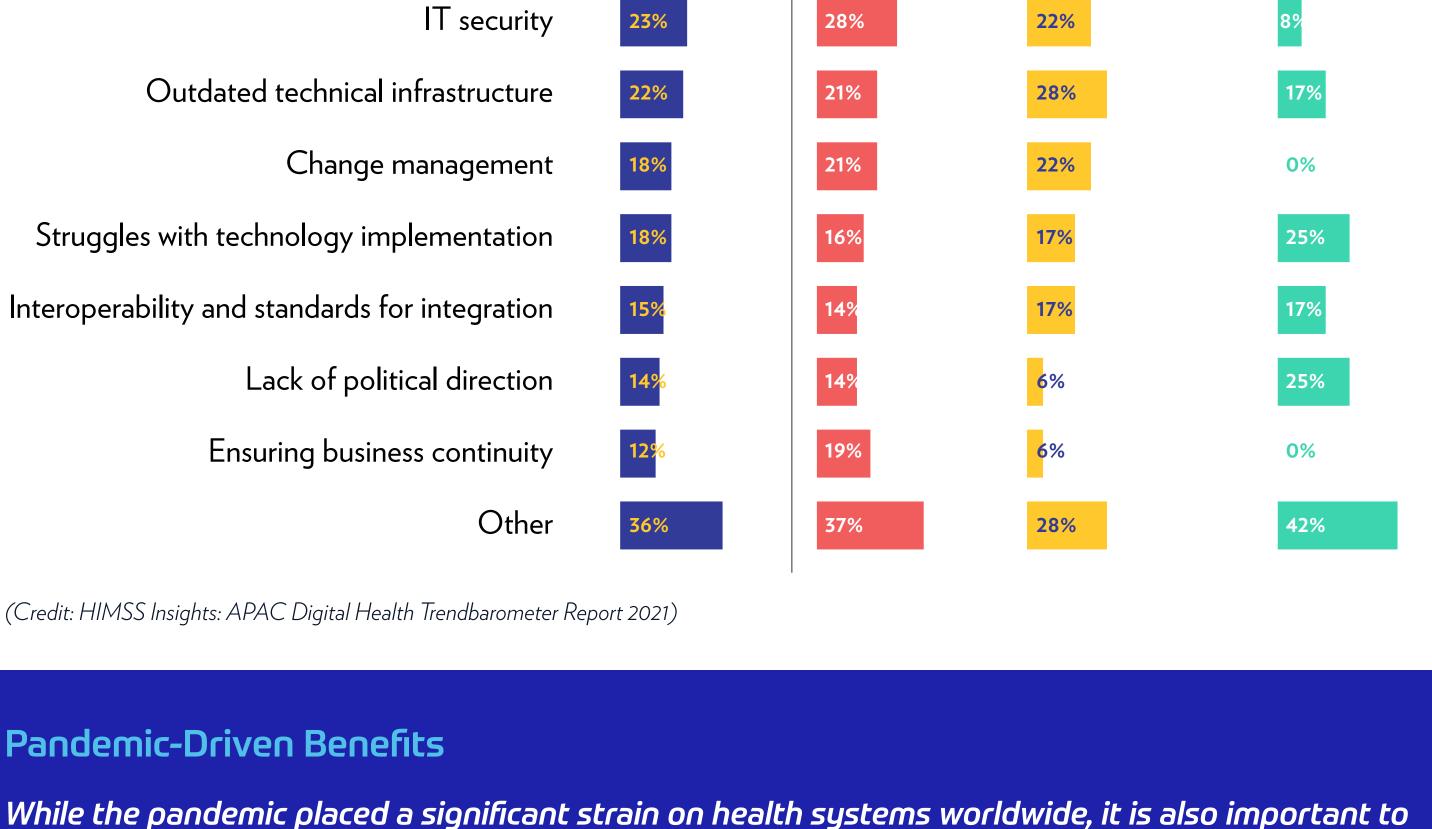
53% 58% Funding and costs 42% 52% **72%** 58%

Total

Southeast Asia

Oceania

44%



• Digital technology is reported to reduce healthcare costs by 7-11%³

highlight the boons it brought as a result.

Patient-Centric Care • Increase in telemedicine and eHealth enables easy and accurate

diagnosis of health and diseases³

Economic Gains



their digital readiness.

SINGAPORE

• The prevalence of digital healthcare solutions,

which may not involve physical premises, has led the

• Telemedicine licensing will be introduced in the

SOUTH KOREA

Accelerated regulatory reforms, including clear

data using mobile phones, credit card payment

• Thailand 4.0 policy launched various healthcare

applications such as H4U (personal health profile

app), Smart Health ID (patient administration cloud

service) and Primary Care Cluster App (telehealth

Artificial intelligence (AI) and 5G technology were

applied to combat COVID-19 and enabled doctors to

standards for de-identification of personal information

and enabling the convergence of public and private

in late 2022⁵.

third phase of HCSA and is estimated to roll out



associated with digital technologies, and consider their

Acceleration of Adoption and Government Initiatives

infrastructure and regulatory environment when assessing

technologies is expected to reduce the strain on healthcare professionals³

Better Use of Resources

• Deployment of tech devices in real-time can enable interventions

at an early stage, improving healthcare outcomes³

• Digital health interventions have enormous potential with scalable tools

that improve health and healthcare delivery by enhancing effectiveness,

The pandemic has accelerated the adoption of technology and pushed governments across the Asia Pacific region to implement various initiatives to enhance accessibility of healthcare.

AUSTRALIA

INDIA

• National Digital Health Mission (NDHM) is a

step towards better healthcare transparency,

interoperability, standardisation and innovation that

can stack up to USD20.69 billion in economic value

5G Development Project) improves emergency

INDONESIA

• To facilitate telemedicine and ensure the access

of healthcare to its furthest region, the Indonesian

government launched the US\$1.5 billion Palapa Ring

medical care response times and enables real-time

medical data transfer for greater accuracy in patient

• Integration of EMR and MHR creates a single view

of a patient's encounters with different parts of the

healthcare system to provide more personalized Ministry of Health (MOH) in Singapore to license telemedicine under the forthcoming Healthcare medical care with better outcomes. Research has shown that among every two patients, one medication Services Act (HCSA), which adopts a service-based regulatory framework, replacing the Private Hospitals is omitted from their medication history. Integration and Medical Clinics Act (PHMCA), which adopts a can prevent any past medical errors⁶. premises-based regulatory framework⁴.

history and CCTV data. Expanded high-tech digital tracing measures and information gathering for highly successful COVID-19 management⁷. **THAILAND**

and telemedicine)9.

better diagnose patients9.

Measuring Progress towards Digital Health Health systems need to accelerate and strengthen their capacity and resilience to stay prepared for

that could be strengthened to advance digital health.

DHI measures the four dimensions of digital health:

Governance & Workforce

of quality, safety and outcomes;

policy and decision-making to

align process and strategy;

and workforce capacity and

competency to advance

digital health system

Person-Enabled

Personalised care delivery,

proactive risk management and

capability.

Health

Stewardship to inform policy making;

transparency to create clear indicators



diagnosis¹⁰.

over the next decade⁸.

Project. Comprising 35,000km undersea fiber-optic cables and 21,000km land cables, it is set to improve connectivity by providing access to 4G internet services to more than 500 regencies across the country¹¹.



optimise health system performance, including quality, safety and cost. **DIGITAL INDICATOR** Interoperability Interoperability Foundational, structural, semantic, and organisation

experience.

Predictive Analytics

Personalised analytics to support person-

enabled models of care, prescriptive

and predictive analytics to support

population health and wellness,

and operational analytics to

features of the health system's

digital infrastructure that create a

© 2021

truly seamless and automated user

Person Enabled Health predictive approach to supporting and sustaining health and wellness.

into care delivery by transforming data into knowledge

goals in a meaningful way.

References:

across the Asia Pacific region.

February 24, 2021

To deliver digitally-enabled care, health systems must foster an environment that integrates predictive analytics

and sharing insights to inform policy decisions and support

patient treatment. This will give patients more control over

Workforce Workforce

HEALTH

their health and often set personal health and wellness

This infographic was prepared by HIMSS in partnership with Roche.



³ Healthcare Digitalization and Pay-For-Performance Incentives in Smart Hospital Project Financing, Roberto Moro Visconti, Donato Morea, March 30, 2020 ⁴ In brief: digital healthcare in Singapore, Tony Yeo and Benjamin Gaw, Drew & Napier LLC, June 14, 2019

⁶ Electronic Medical Records will be linked to My Health Record in South Australia, Roy Chiang, Healthcare IT News Australia,

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⁷ Behind South Korea's Success in Containing Covid-19: Surveillance Technology Infrastructures, Myungji Yang, January 21, 2021

¹⁰ Gobind: 5G demonstration projects bring huge success for MCMC, Malaysiakini, January 19, 2020 ¹¹ Indonesia's Healthcare Industry: Growing Opportunities for Foreign Investors, Ayman Falak Medina, ASEAN Briefing, July 30, 2020

- ⁸ Digital Health Mission a R1.5 trillion opportunity for India, Consultancy.in, November 16, 2020 ⁹ Thailand's focus to promote use of technology in healthcare will have significant impact, GlobalData, May 20, 2020