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Opportunities by Sectors: HEALTH

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11TH BUSINESS OPPORTUNITIES FAIR 2023

4 - 5 OCTOBER 2023 | 9:00 AM - 5:00 PM | MANILA

HEALTH SECTOR DIRECTIONAL GUIDE 2030

Achieving Universal Health Coverage in Asia and The Pacific



<https://www.adb.org/documents/strategy-2030-health-sector-directional-guide>



Where we are

Key trends



Demographic shifts & urbanization

Aging, youth bulge, changing disease burdens, barriers in accessing care



Climate change

Lack of resilience, high health sector carbon emissions (limited “Green” infrastructure & supply chains)



Decentralization & regional cooperation

Gaps in planning & resource allocation
Lack of information sharing



Pandemic threats

Limited public health capabilities to detect, assess, report, and respond to pandemics
Vaccine availability



Digitalization

Health worker shortages, low quality of care, digital health inequities, data privacy

Where we want to be

Operational focus

Improved

Governance, policy and public goods



Strong regulation, legislation, stewardship and accountability

Sustainable

Health financing and incentives



Well-funded private and public sector
Universal access to high quality health care (reduce catastrophic out of pocket expenses)

Expanded

Health infrastructure and systems



Development of appropriate physical and digital infrastructure; resilient and green supply chains

Strengthened

Health workforce



Adequate supplies of managerial, clinical, technical staff
Suitable roles, skills and training for all health staff

Enhanced

Pandemic preparedness & response



Robust prevention, preparedness and response capabilities in all DMCs and at the regional level through One Health approach

What we will do

Guiding principles



Sustain an expanded Health Sector Portfolio



Improve Multisectoral and Integrated projects



Contribute to Knowledge Services and build Partnerships



Extend Private Sector Participation through Innovative Financing



Develop Health Staff Skills for emerging health priorities



Support the One ADB Approach

1. Impact of the COVID-19 pandemic



CASES AND DEATHS

756 million+ COVID-19 cases and 6.5 million+ deaths¹



HEALTH DISRUPTION

Due to foregone health, 8-35% increase in maternal and child deaths globally²



MENTAL WELLBEING

25% increase in depression cases and 27% increase in anxiety cases³



ECONOMIC IMPACT

3.6% - 6.3% GDP loss for developing Asia in 2021⁴



LIVELIHOODS

3.3 billion global workforce at risk of losing livelihoods⁵



POVERTY & INEQUALITY

500 million+ people pushed into poverty⁶

¹ WHO COVID-19 Dashboard: <https://covid19.who.int/>

² Robertson, et al. 2020. "Early estimates of the indirect effects of the COVID-19 pandemic on maternal and child mortality in low-income and middle-income countries: a modelling study" Lancet 8(7):E901-9083

³ Mental Health and COVID-19: Early evidence of the pandemic's impact: Scientific brief, 2 March 2022 (who.int)

⁴ ADB Macroeconomic Impact of COVID-19 in Developing Asia: <https://www.adb.org/publications/macroeconomic-impact-covid-19-developing-asia>

⁵ Impact of COVID-19 on people's livelihoods, their health and our food systems (who.int)

⁶ <https://www.who.int/news/item/12-12-2021-more-than-half-a-billion-people-pushed-or-pushed-further-into-extreme-poverty-due-to-health-care-costs>



2. Challenges: Lingering impacts of the pandemic

- ❖ Higher demand and utilization of health systems
- ❖ Increased regional collaboration for health security and resilience
- ❖ Scientific community demonstrated remarkable cooperation
- ❖ Scaling up lessons learned and applying new innovations
- ❖ Long-term pandemic impacts e.g., persistent needs for vaccines, therapeutics, health insurance

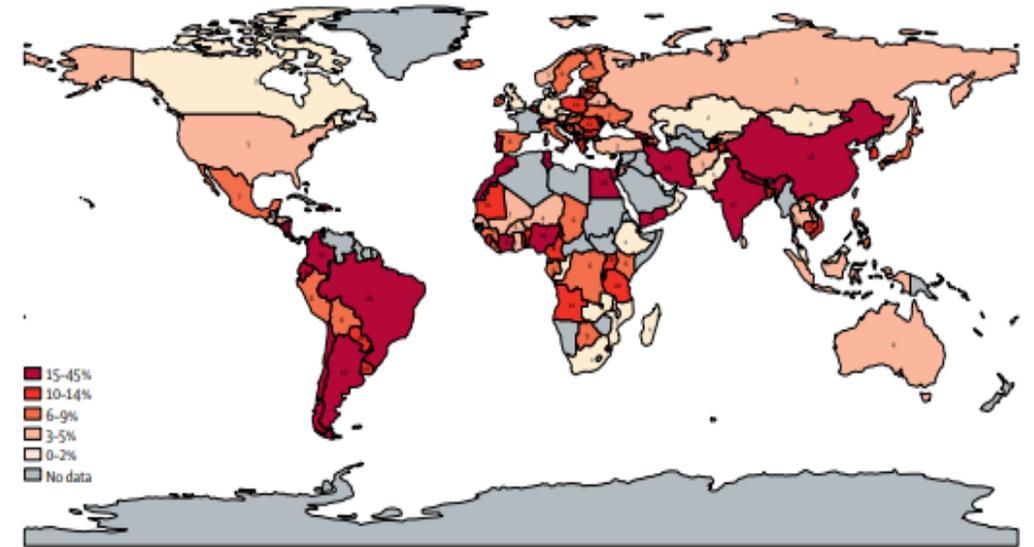
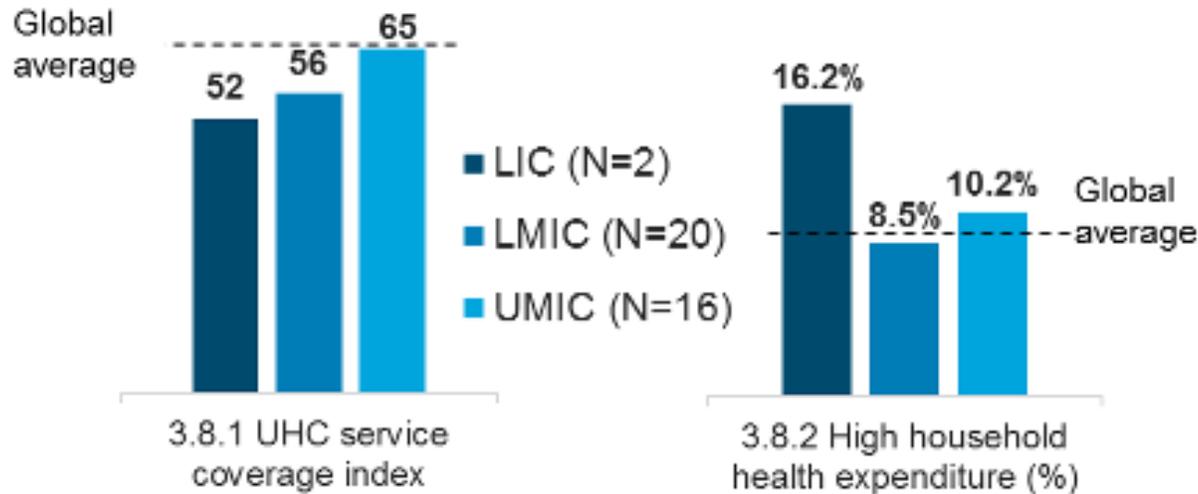
ADB Pandemic Health Support

- **Emergency assistance** – rapidly mobilised grants & technical assistance
- **COVID-19 Pandemic Response**, over \$20B for support for economic/health/social responses
- **Asia Pacific Vaccine Access Facility** – \$9B for vaccine procurement & delivery systems
- **Technical assistance** – health workforce capacity building, risk communications, community mobilisation, vaccine manufacturing
- **Regional Vaccine Advisory Group (RVAG)**



3. Progress on universal health coverage (UHC)

Sustainable Development Goal 3: UHC indicators, ADB Asia and the Pacific Developing Member Countries



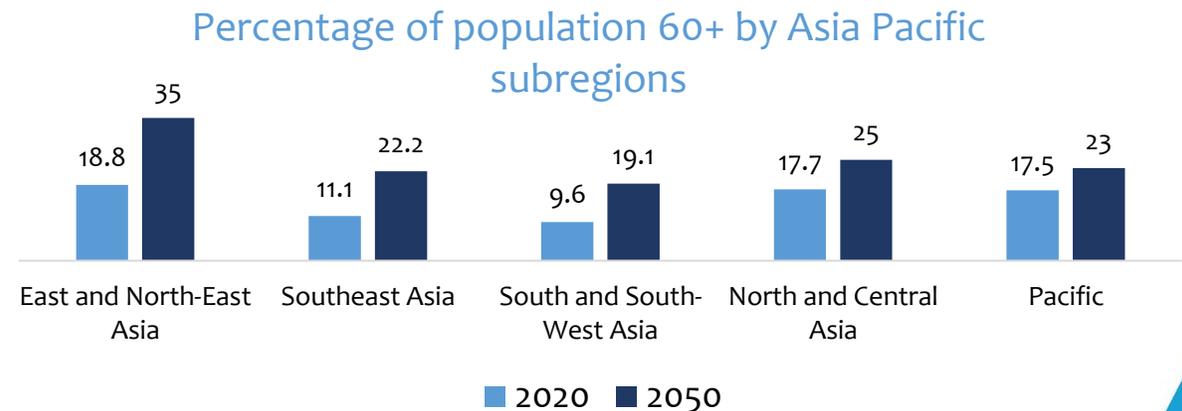
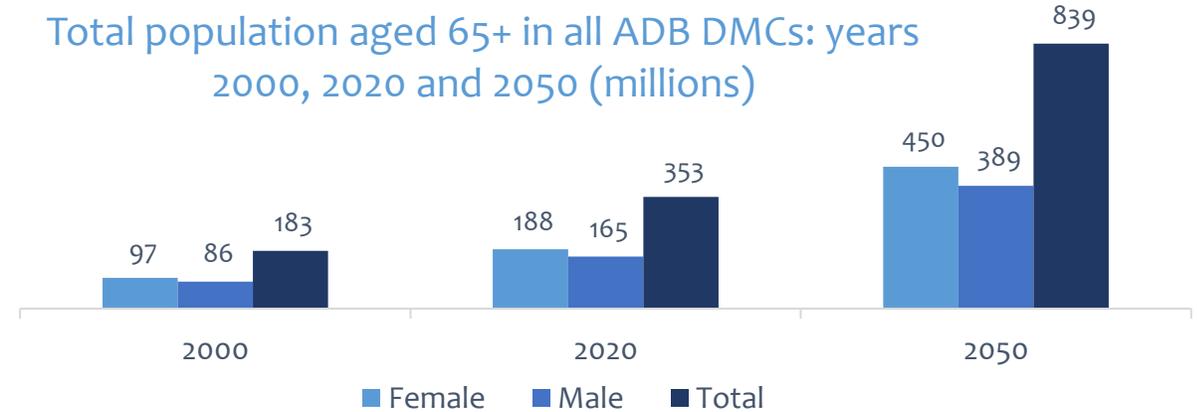
Incidence of catastrophic health spending at 10% threshold. Asia accounts for **65%** of global catastrophic health expenditure

WHO (2021). Global Health Observatory – SDG 3.8.1 and SDG 3.8.2 indicator data.



4. Health impact of ageing in Asia and the Pacific

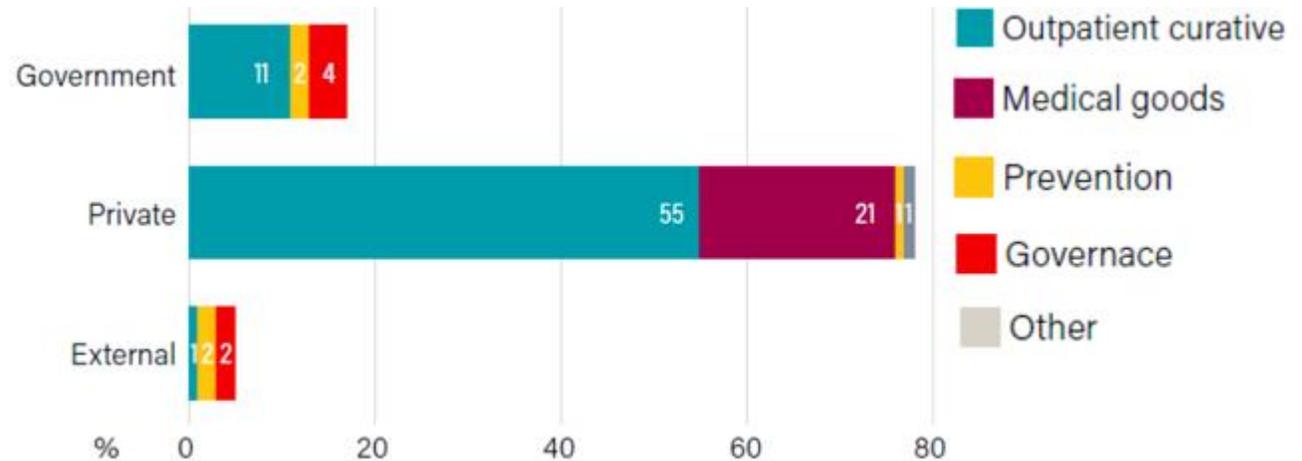
- **Fastest aging region** in the world
- By 2050, **11 economies** in Asia and the Pacific region will be classified as “**super aged**”, and almost a quarter of the region’s population will be over 60.
- MORE elderly -> MORE complex and chronic health conditions to manage
- **LOW stock of formal health and care workers and overreliance on informal care, performed by women**



5. Impact of Non-Communicable Diseases (NCD) on health systems

- NCD care is mostly paid out-of-pocket, especially by those left out of health insurance.
- Increases risk of impoverishment due to catastrophic health expenditures and losses in wages, productivity and human capital
- **Lack of adequate prevention, diagnosis and care for NCDs is a major risk to UHC (SDG 3.8).**

Who
pays for
NCDs?



Who pays for NCDs: WHO Global Health Expenditure Database, 2021 (via NCD)



6. Focus on Climate change and health

The Health Sector is a **major global emitter** but also the **first responder** to climate change

Health Sector Emissions Will Triple By 2050 Reaching 6 Gigatons Per Year

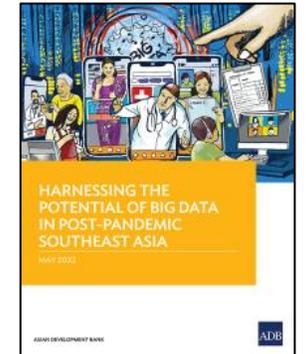
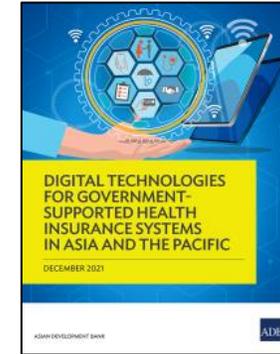
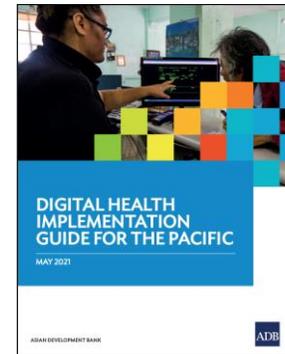
- **Healthcare's climate footprint is equivalent to 5% of global net emissions**
- If the health sector were a country, it would be the fifth-largest emitter on the planet (1. USA ; 2. China ; 3. India ; 4. Russia ; 5. *Healthcare sector* ; 6. Japan ; 7. Brazil)
- Global health care climate footprint is equivalent to the annual greenhouse gas emissions from 514 coal-fired power plants
- **Decarbonization is part of pandemic preparedness and health system resilience**



7. Focus on Digital health innovation

Knowledge generation

- 44% of ALL venture capital investments in digital health worldwide were in Asia in 2020
- Consistent growth in new digital health technologies expected in Asia and the Pacific – up to \$100 billion in value by 2025



Support for regional organizations



Support for governments



Nepal: Health Insurance Board



Lao PDR: MOH (eHealth, EMR)



India: National Health Authority (National Digital Health Mission)



Snapshot of Sovereign Operations

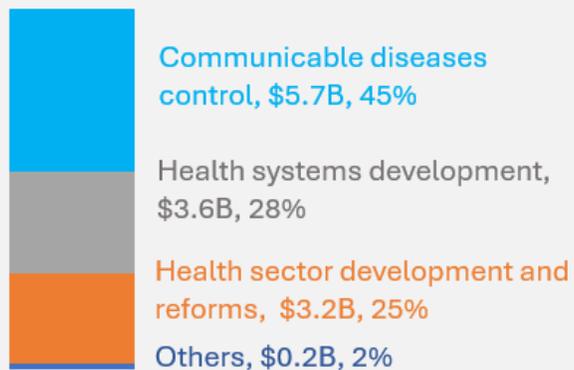


Share of Health in ADB Financing

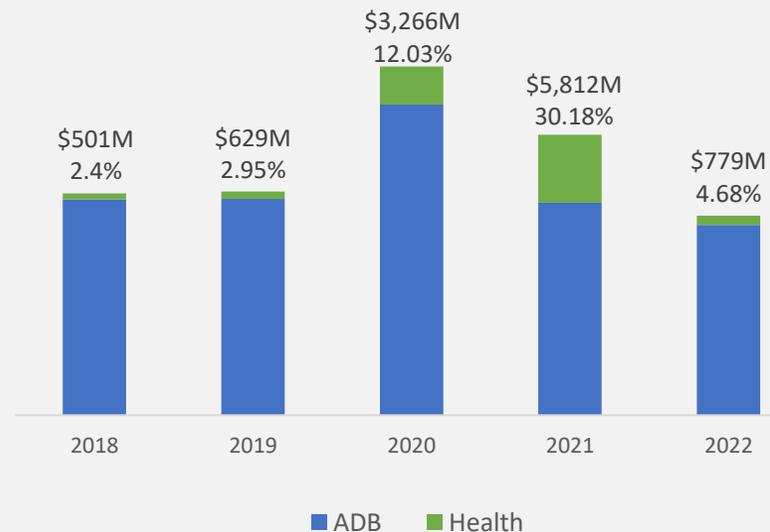
Health

Loan & Grant Approvals by Subsector
1968-Present (as of 31 July 2023)

\$12.7 B



Health Share in ADB Financing Annual commitments, 2018-2023



Increase health sector portfolio share to **6-10%** of total commitments

Sources: SPD operations data and DeFRs, 2018-2022

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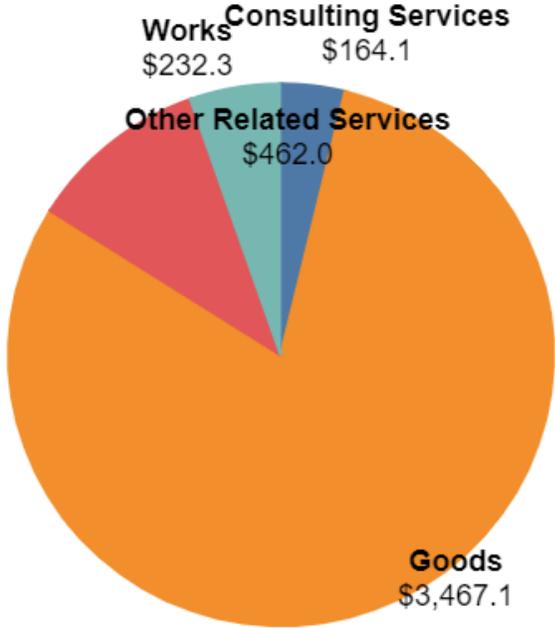
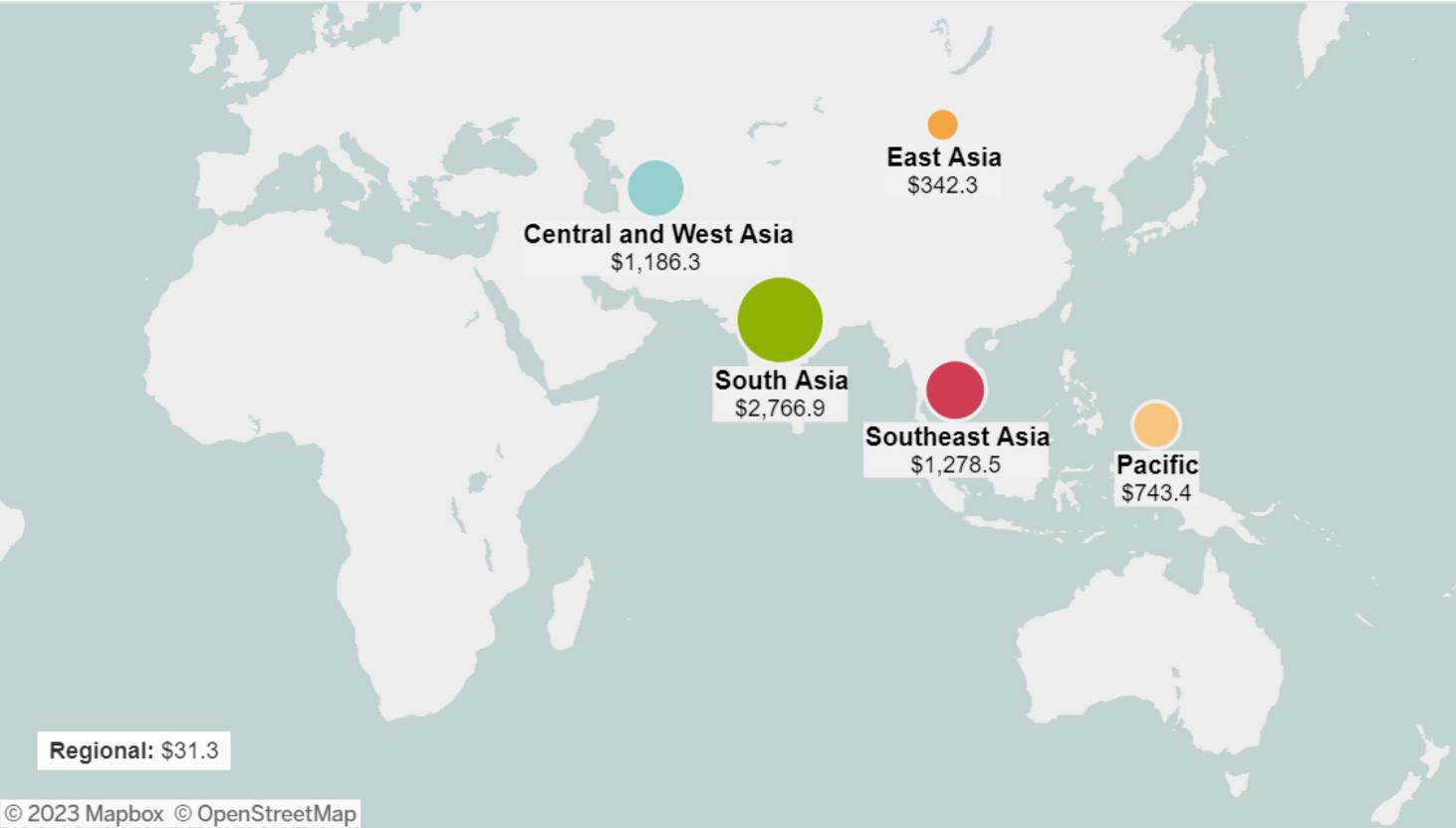


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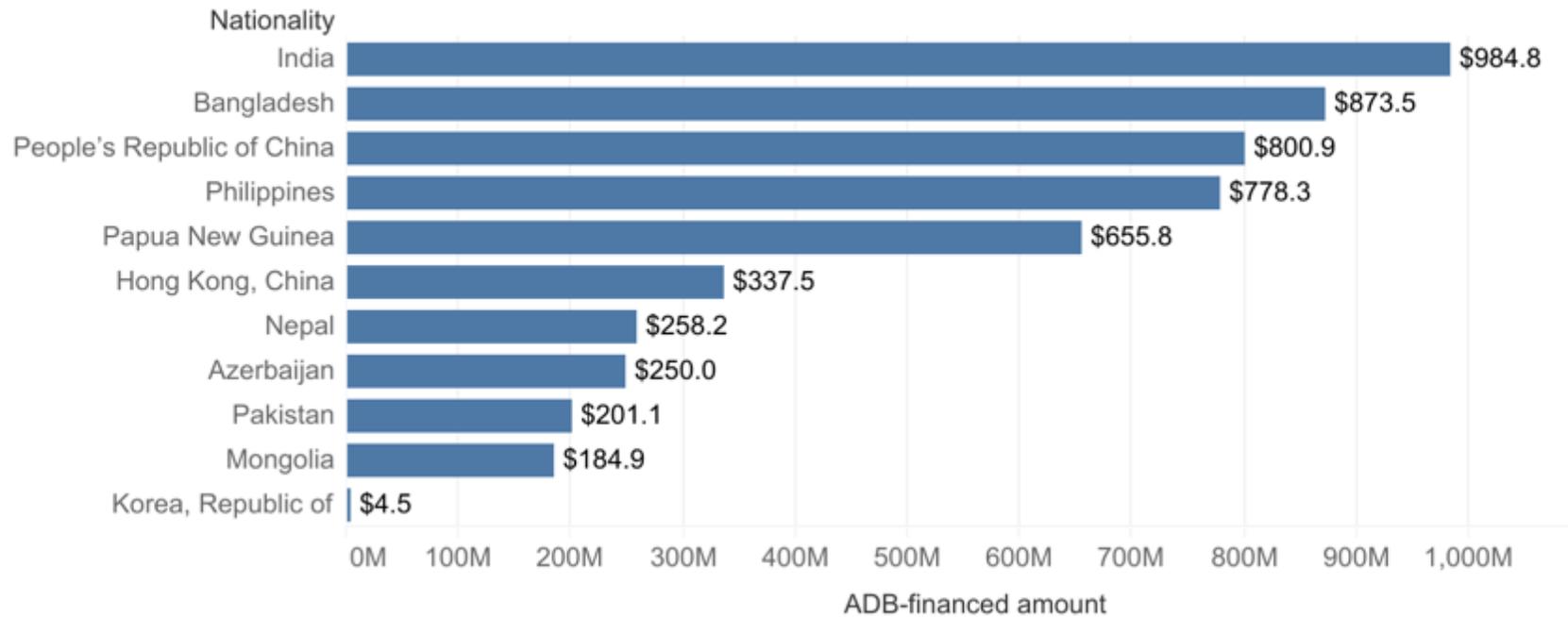
ADB Health Sector: 2018-2022 (total)

Operational Procurement by Region, US\$ million



Major health contractors, 2018-2022

Operational Procurement by Nationality of Contractor, US\$ million



Modality

- (All)
- Investment Support
- Policy-based Support
- Result-based Lending

Nature of Procurement

- (All)
- Consulting Services
- Goods
- Other Related Services
- Works



Pipeline health projects 2023 – Central West Asia, East Asia, Pacific

Region	Country	Project Name	Amount (\$M)
Central west	ARM	Health System Transformation Project	35.0
	GEO	Health System Enhancement Program	50.0
	TKM	Improving Nursing Quality and Capacity project	75.0
	UZB	Integrated Perinatal Project	100.0
East Asia	MON	Developing Elderly Care Services and System	3.0
	REG	Resilient and Integrated Border Services for Safe and Fast Trade (15% of \$32M ADB Financing)	4.8
Pacific	KIR	Kiribati Health Infrastructure Project	25.0
	PNG	Additional Financing to Health Services Sector Development Project	42.0
	TON	Integrated Aged Care in Tonga	3.0



Pipeline health projects 2023 – South Asia, South East Asia

Region	Country	Project Name	Amount (\$M)
South Asia	BAN	Support for Health Care Improvement Program	500
	BAN	Strengthening manufacturing and regulatory upgradation for vaccines, diagnostics, and therapeutics	300
	IND	Maharashtra Tertiary Care and Medical Education Project	500
	IND	Supporting Health Systems Development Program (PM-ABHIM) (Subprogram 1)	170
South East Asia	INO	Boosting Productivity and Human Capital Program - Subprogram 2	50
	INO	Supporting Essential Health Actions and Transformation (SEHAT) RBL	350
	LAO	Improving the Quality of Health Care	45
	LAO	Greater Mekong Subregion Border Areas Health Project	20
	MYA	Providing Essential Services for Myanmar People Project (Output 1)	15
	PHI	Build Universal Health Care (BUILD UHC, Subprogram 2)	500
	THA	Thailand Medical Excellence Centers	255



Opportunities: Needs for health technical assistance

Climate change and health

Health workforce

Pandemic preparedness &
response

Digital health

Non-communicable diseases
including mental health

Health financing systems (especially
digital innovations)

Vaccine manufacturing and vaccine
market analytics

Regulation of diagnostics,
therapeutics, vaccines

Medical education



Summary and outlook

- ❖ Increased spending on health – improve preparedness, address health system gaps highlighted by COVID-19 pandemic, achieve Universal Health Care
- ❖ Multisectoral / integrated approaches
- ❖ Innovative financing through private sector participation
- ❖ Develop health human resource and skills
- ❖ More demand for knowledge products



Consulting business opportunities (individual experts/resource persons and consulting firms)

- ❖ Diagnostic and analyses of best practices, including design and implementation
- ❖ Innovative monitoring and evaluation
- ❖ Cross-sectoral expertise e.g., climate and health
- ❖ High quality in-dept knowledge products, in partnership with relevant ADB Sectors



Health, Human and Social Development, Sectors Group.

Priority Areas of ADB Health Sector Directional Guide 2030 and Focal Contacts

Overall lead: Director, Health Practice Team

Priority Area

Improving governance, policy and public goods

Enhancing health financing and incentives

Expanding health infrastructure and systems

Strengthening the health workforce

Enhancing pandemic preparedness and response

Climate change and health

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