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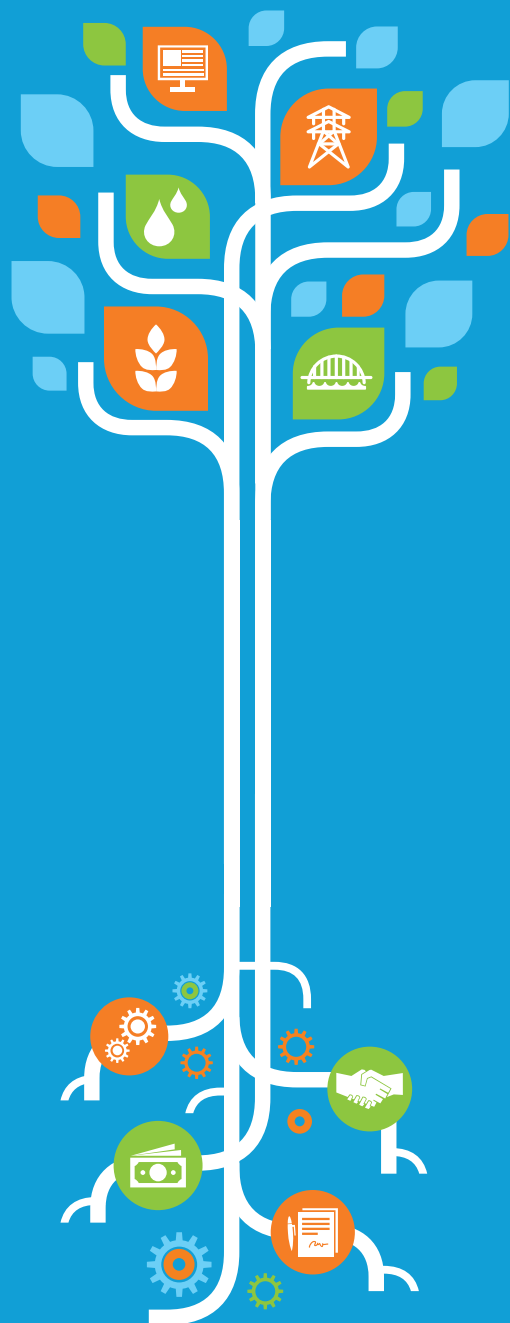
ADB

Improving Health in Asia and the Pacific

8 September 2021

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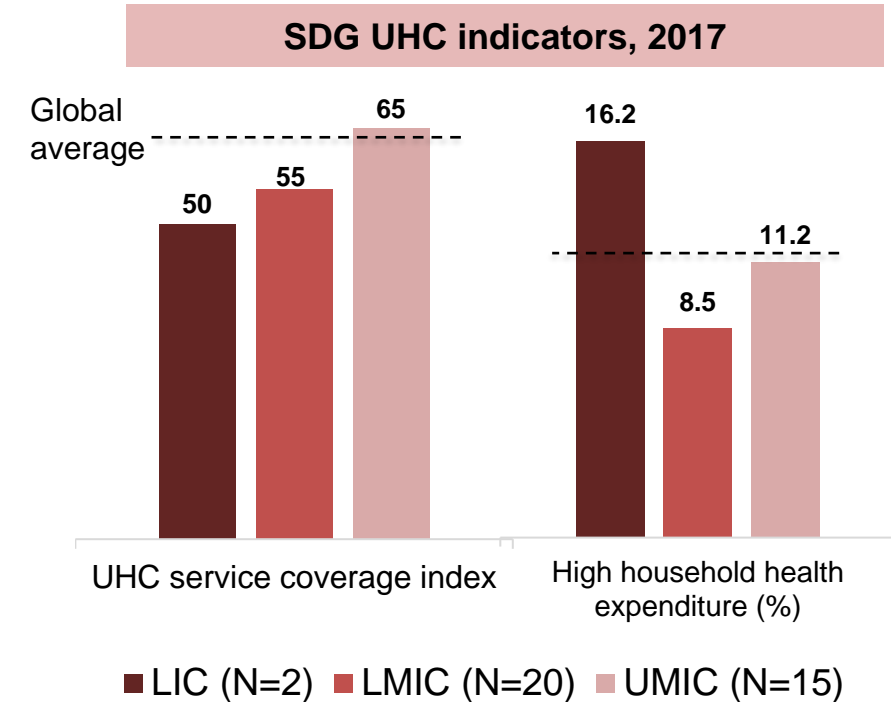
BUSINESS
OPPORTUNITIES



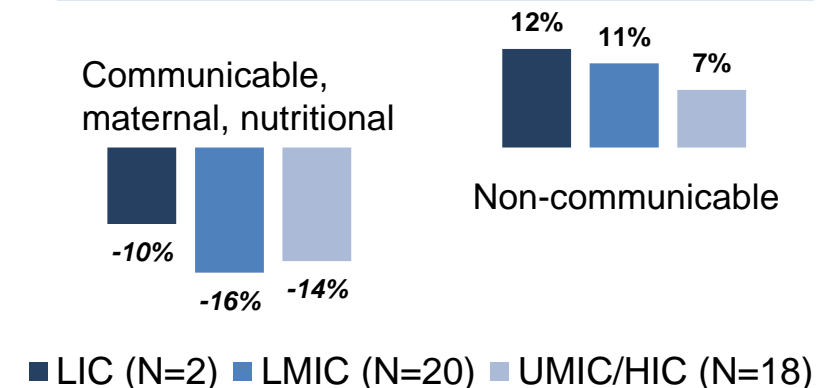
Major trends in progress towards UHC in the Asia Pacific region

- The 40 countries with ADB operations represent a diverse set:
 - Mostly **middle-income** with several small island countries
 - Average 44% urban** vs. 40% globally for lower-middle income countries (LMIC)
 - Facing increasing **non-communicable disease** burden: **66%** of all DALYs
- Region has **variable progress** in the SDG 3 UHC-related indicators
 - Low-income countries (LIC) and LMIC are performing **below global average**
 - Average share of out-of-pocket expenditure in total spending at **37%** (2017) is lower than global LMIC average of 56%; yet some countries have high values

ADB Asia Pacific Countries with Operations¹



Change in DALYs by cause, 2015 to 2019



¹ Includes three high income small island countries (Cook Islands, Nauru and Palau). Data: WHO (2017), IHME (2019). High household exp. measured at 10% threshold

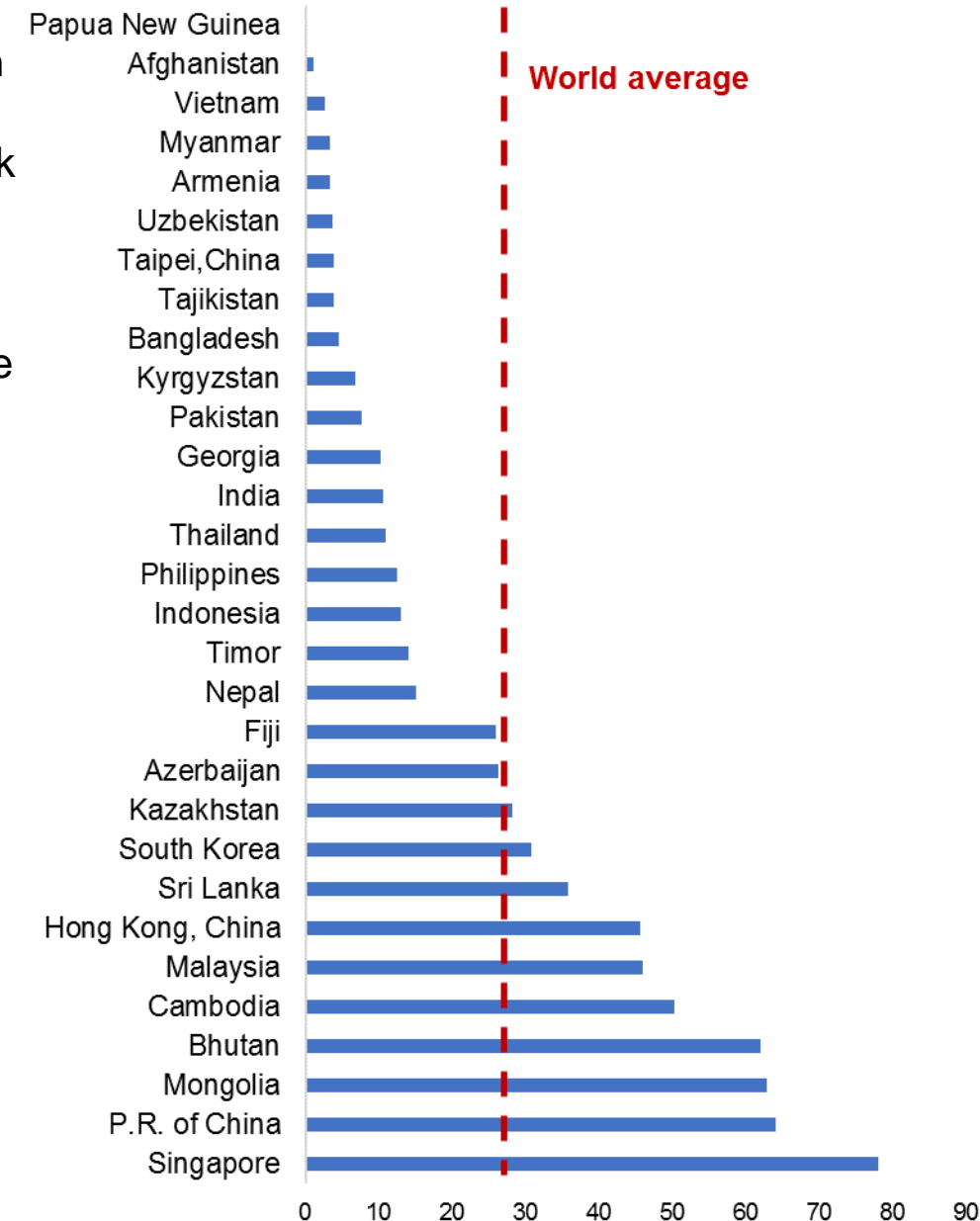
Engaging the private sector and health sector reform

- Some countries have **significant private health** markets. In Indonesia **49%** of births were with a private provider, **44%** in Pakistan (2017)
 - Yet stewardship and regulation of the private sector remains weak²
- For all countries with **ongoing structural reforms**, using evidence to adapt strategies and engage the private sector will be key; for example:
 - **India**: hospital care under PM-JAY and impact on reducing OOP; reorganizing urban PHC
 - **Philippines**: implementing financial and provider integration per the UHC Act
- Asia Pacific countries will need budgetary space to pursue expansion and deepening of social insurance systems (i.e., true reach, higher quality)
 - **Thailand**-type, geared to combat NCDs, higher quality, more expensive, high subsidy share
 - **Indonesia** is beginning to head in Thailand's direction, but with constrained budgetary space
 - Or **Viet Nam**: 88%+ coverage of SHI, high subsidy component, and not yet supplying high breadth and depth of care, while facing financial unsustainability

Progress against COVID-19

- **COVID-19 vaccine financing:** ADB's US\$9 billion financing facility (**APVAX**), plus cofinancing from AIIB, and significant financing from the World Bank + domestic budgetary funding
- 30 countries in developing Asia with data:
 - Highly variable progress in fully vaccinating the adult population – range **<1% to 78%**
 - **Supply-demand imbalances** and slow rise in delivery readiness prevented rapid progress
 - **Supply conditions will ease** in 2022, but desire for progress in 2021 given outbreaks
- Non-pharmaceutical prevention interventions still important; yet cause short-term economic costs and disruptions to services in social sector
- Continuing:
 - **Health system strengthening** (preparedness & resilience; hospital investments, e.g., oxygen)
 - **Regional public goods** for health security
 - Greater **regional vaccine manufacturing**

Percent of population fully vaccinated, Aug 31



Opportunities and risks in the next few years

Counter five major “lingering” effects of COVID-19

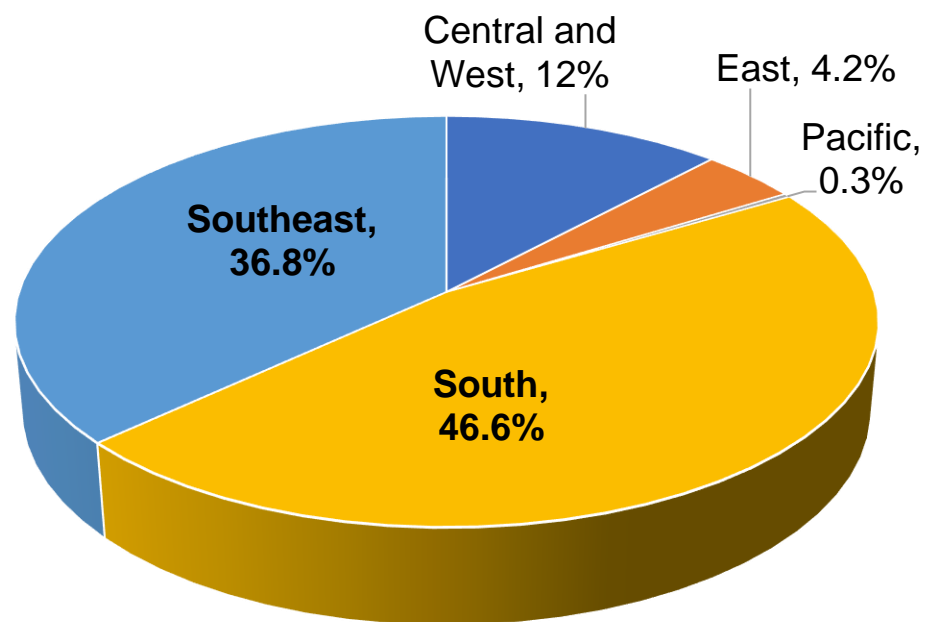
- 1. *Revive the growth track towards SDG3 in use of essential/routine health services*:** During COVID-19 healthcare use declined. Recovery of key primary/preventive is a priority
- 2. *Rebuild better public health, diagnostic and curative services*:** Seen shortcomings in intensive care beds, oxygen supply, capacity and capability of healthcare staff, and diagnostic services. Severe effect on frontline health workers. Healthcare supply chains severely affected.
- 3. *Meet the demand for improved pandemic preparedness*:** Weaknesses in national health security capabilities: need to develop resilient health systems that can respond to future crises.
- 4. *Potential for translating lessons learned and scaling up successful innovations*:** New digital and contactless tools; rapid digital solutions for payments. Ongoing drive for COVID-19 vaccines.
- 5. *Manage health and non-health sector effects that impact health system renewal*:** Invest in sustainable population-level COVID-19 immunization. Face up to fiscal constraints. Restore trust in public health care delivery. Reassess employment-based health given shifts in labor markets.

Critical concerns towards progress in UHC include arresting the rise in Asia Pacific’s **NCD burden**, diversifying DMCs’ **resource mobilization**, and effective public-private **partnership**.

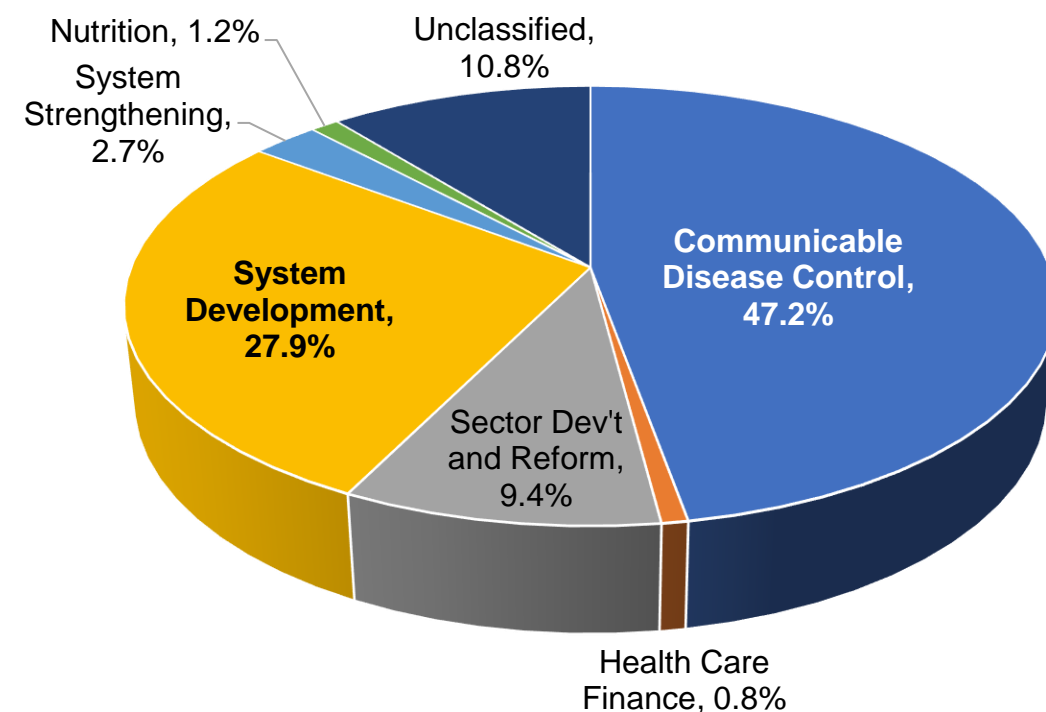
ADB Health Sector Pipeline, 2021

US\$6.39 billion (Sovereign: aimed at governments) plus US\$0.4 billion cofinancing

By ADB Region



By Subsector



79% of the sovereign pipeline/portfolio (US\$5 billion) is COVID-19 related, including for APVAX

Prospects under Asia Pacific Vaccine Access Facility (APVAX)

amounts in US\$ million

DMCs	Board Approval dates	RRC ¹ Ceiling	Total approved or requested (incl. PIC ²)
A. Approved as of Aug 30, 2021			
Philippines (total)	11-Mar-21	\$416	\$425
Indonesia	31-Mar-21	\$1,040	\$450
Afghanistan (Grant)	20-Apr-21	\$100	\$50
Mongolia (ADB)	28-May-21	\$19	\$19
Small Island Countries**	May-Jun 21	\$110	\$19
Tajikistan (Grant)	16-Jun-21	\$54	\$25
Bangladesh	22-Jun-21	\$940	\$940
Sri Lanka	8-Jul-21	\$84	\$150
Nepal	22-Jul-21	\$165	\$165
Pakistan	6-Aug-21	\$1,248	\$500
Sub – Total (A)		\$4,176	\$2,743
B. Anticipated			
	Board consideration		
Georgia	September	\$15	\$15
Kyrgyz Republic	October	\$38	\$25
India	November	\$1,500	\$1,500
Indonesia (SOV #2)	TBD	-	\$590
Cambodia	TBD	\$95	\$95
Sub – total (B)		\$1,648	\$2,225
Total (A+B)		\$5,824	\$4,968
Remaining headroom			\$4,032

¹ Rapid response component: aimed at vaccine procurement & logistics. ² Project investment component: aimed at systems for distribution, delivery, administration and manufacturing.



Non-COVID-19 Health Pipeline, 2021: detail (1)

Values in US\$ millions

Central and West Asia

Country	Project	ADB
Azerbaijan	COVID-19 Active Response and Expenditure Support Program (Health: 32% of \$250M ADB Financing)*	80
Pakistan	Integrated Social Protection Development Program (Health: 12.5% of \$600M ADB Financing)*	75
Total, 2021 Central and West Asia		155

East Asia

Country	Project	ADB
People's Republic of China	Public Service Sector PPP Promotion and Elderly Care Demonstration Project	150
Mongolia	Strengthening Health Security Program (Subprogram 1)	100
Total, 2021 East Asia		250

*Multisector project, reflects amount allocated to Health Sector only





Non-COVID-19 Health Pipeline, 2021: detail (2)

Values in US\$ millions

Southeast Asia

Country	Project	ADB
Cambodia	GMS Health Security Project - Additional Financing	25
Indonesia	Boosting Productivity and Human Capital Program, Subprogram 1* (Health: 10% of \$500M)	50
Indonesia	[Redacted] Pharma Co. Investment Project (formerly Strengthening Vaccine Access Facility)	100
Lao PDR	Improving the Quality of Health Care Project	45
Philippines	Build Universal Health Care Program, Subprogram 1	600
Total, 2021 Southeast Asia		820



*Multisector project, reflects amount allocated to Health Sector only

Non-COVID-19 Health Pipeline, 2021: detail (3)

Values in US\$ millions

South Asia

Country	Project	ADB
Bangladesh	Strengthening Social Resilience Program (Subproject 1)* (Health: 30% of \$250M of ADB Financing)	75
Bangladesh	Emergency Assistance Project (Additional Financing)* (Health: 24.15% of \$41.4 M of ADB Financing)	41.4
Sri Lanka	Health System Enhancement Project (Additional Financing)	110
Total, 2021 South Asia		226.4

Private Sector, Nonsovereign

Country	Project	ADB
India	COVID-19 Hospital Service Delivery Project	20
India	Krsnaa COVID-19 Diagnostic Services	5.4
Total, 2021		25.4

*Multisector project, reflects amount allocated to Health Sector only

Looking Outward: Health Pipeline, 2022

Values in US\$ millions

Country	Project	ADB
Central and West Asia (\$70 million)		
Kyrgyz Republic	Strengthening Diagnostic and Reference Laboratory Capacity Project	20
Pakistan	KP Health Systems Strengthening	50
South Asia (\$250 million)		
India	Supporting Health Systems Development Program (PM-ASBY) (Subprogram 1)	250
Southeast Asia (\$300 million)		
Indonesia	Supporting Essential Health Actions and Transformation Project/Program	300
Total Loans and Grants, 2022		620

Looking Outward: Health Pipeline, 2023-24

Values in US\$ millions

Country	Project	ADB
2023: East Asia (\$4.8 million)		
Mongolia	Resilient and Integrated Border Services for Safe and Fast Trade* (Health: 15% of \$32M ADB Financing)	4.8
2023: Pacific (\$3.2 million)		
Tonga	Integrated Aged Care in Tonga* (Health: 30% of \$10.5M ADB Financing)	3.2
2023: South Asia (\$1,000 million)		
Bangladesh	Support for Health Care Improvement Project	500
India	Maharashtra Medical School Education Project	500
2023: Southeast Asia (\$500 million)		
Philippines	Build Universal Health Care Program, Subprogram 2	400
Philippines	Health System Enhancement to Address and Limit COVID-19 (Addl. Financing)	100
2024: Central West Asia (\$13.3 million)		
Pakistan	Revitalization and Reintegration of River Ravi Project* (Health: 13.3% of \$100M)	13.3
2024: Pacific (\$25 million)		
Kiribati	Kiribati Health Infrastructure Project (KHIP)	25
Total loans and grants (2023-2024)		1,546

*Multisector project, reflects amount allocated to Health Sector only

HSG* Technical Assistance Pipeline 2021-2023

Values in US\$ millions

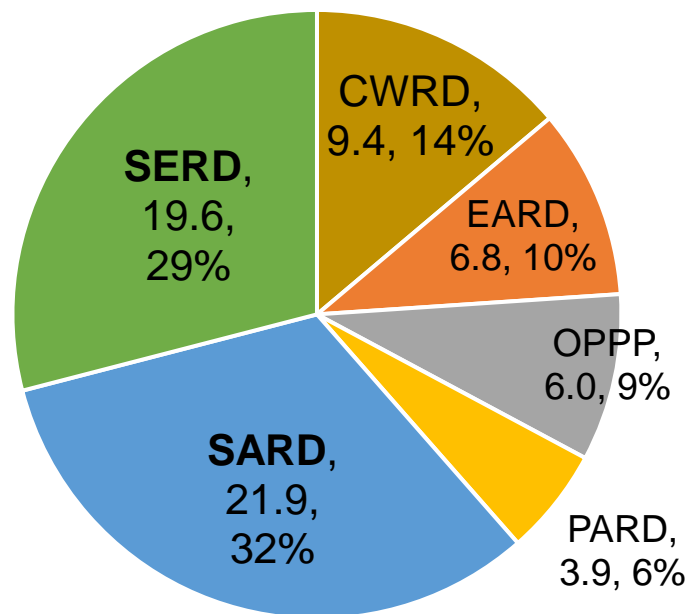
TA # & Title	Approved Value (incl. projected)	End Date	% Disbursed	Key areas
8983 Universal Health Coverage for Inclusive Growth: Supporting the Implementation of the Operational Plan for Health, 2015–2020 (Supplementary)	\$3.3	30-Sep-21	74%	<ul style="list-style-type: none"> • Health information systems, HRH • Capacity development
9768 Supporting Improved Health Outcomes in Asia and the Pacific	\$1.5	31-Dec-22	18%	<ul style="list-style-type: none"> • UHC best practices • National studies • Capacity development
9950 Regional Support to Address the Outbreak of Coronavirus Disease 2019 and Potential Outbreaks of Other Communicable Diseases	\$76.9	28-Feb-23	51%	<ul style="list-style-type: none"> • Emergency PPE buys • Pandemic preparedness • Health system strengthening • Vaccine delivery & hesitancy (KAP) • Health security
9967 Using Digital Technology to Improve National Health Insurance in Asia and the Pacific	\$2.5	31-Dec-23	3%	<ul style="list-style-type: none"> • Digital health and digital MIS • Digital financial technology for health financing

* Only listing regional technical assistance projects managed by the Sustainable Development and Climate Change Department – Health Sector

Other Health Technical Assistance Pipeline 2021-2024

Values in US\$ millions

Health TA by department
US\$67.5 mil.



DMC	Pipeline
Regional/Not specific*	23.5
India	13.4
P.R. of China	5.16
Bangladesh	3
Sri Lanka	3
Pakistan	2.7
Tajikistan	2.55
Philippines	2.5
Indonesia	2
Kazakhstan	1.8
Mongolia	1.65
Vanuatu	1.5
Nepal	1
Kiribati	0.85
Kyrgyz Republic	0.8
Armenia	0.75
Timor-Leste	0.6
Georgia	0.5
Azerbaijan	0.25

* Includes regional TA planned by SERD (5), SARD (1), and PARD (1)

Large Projects: Health TA Pipeline 2021-2022

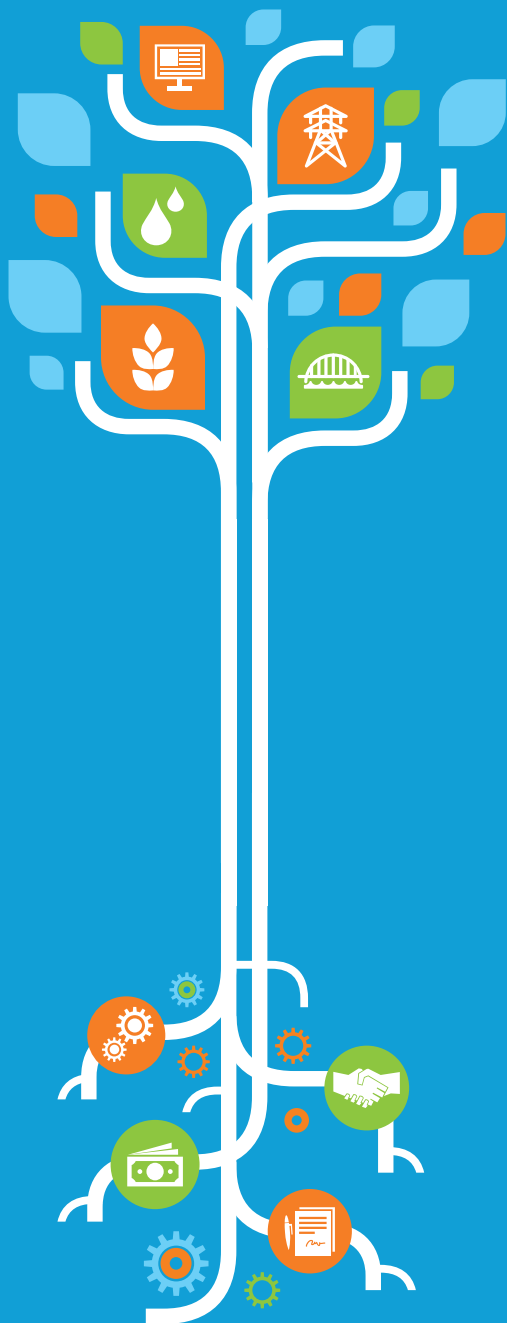
Values in US\$ millions

DMC	Title (Approval Year)	Type*	Value
Vanuatu	Preparing Health Sector Project (2022)	TRTA	1.5
India	Supporting COVID-19 Response and Vaccination Program (2021)	TRTA	7
India	Strengthening Health Systems in achieving UHC (2021)	TRTA	2
India	Strengthening Universal Health Coverage in India: Supporting the Implementation of Pradhan Mantri Jan Arogya Yojana (Supplementary) (2021)	KSTA	1.5
Regional	Support to Address Outbreak of COVID-19 and Strengthen Preparedness for Communicable Diseases in South Asia (Supplementary) (2021)	TRTA	1.5
India	Strengthening Health Systems in achieving UHC (Supplementary) (2022)	TRTA	2
Indonesia	Strengthening the Testing and Tracing Capacity for COVID 19 Response in Indonesia (2021)	KSTA	2
Philippines	Supporting Building Up Universal Health Care (2021)	TRTA	2.5
Regional	Support for Human and Social Development in Southeast Asia II (2021)	TRTA	3.5
Regional	Support for Enhancing COVID-19 Vaccination Roll-out and Expansion in Southeast Asia (2021)	TRTA	5

* TRTA: Transaction TA (helps in project preparation, implementation support, policy advice) | KSTA: Knowledge & Support TA (all other TA, e.g., general institutional capacity building, policy advice, and research)

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THANK YOU!

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