AGENDA

• 2.00 pm – 2.10 pm  WELCOME
  Ms Elodie Journet, Senior Trade and Investment Commissioner to the Philippines & Micronesia, Austrade Manila
  Ms Jeanette Williams, Trade Adviser International Health, Austrade Melbourne

• 2.10 pm – 2.40 pm  ADB SECTORAL PRESENTATION
  Dr Susann Roth, Senior Social Development Specialist, Asian Development Bank
  Sector Overview
  Opportunities
  Countries of Focus

• 2.40 pm – 2.55 pm  Q&A

• 2.55 pm – 3.00 pm  NEXT STEPS & CONTACT DETAILS
1. Select “Chat” function

2. Select “Host & Presenter”

3. Type your question here

3. Press ‘Send’
Susann co-led the preparation of ADB’s new Operational Plan for Health 2015–2020, which aims to double ADB’s health sector operations by 2020. Besides the strategic work, one of her focus areas is to increase ADB private sector health investments, including developing sustainable public–private partnership solutions, expand ADB’s work to support regulatory convergence and capacity development of regulatory agencies and strengthen digital health infrastructure in Asia and the Pacific.
ADB’s Health Sector

Dr Susann Roth, Senior Social Development Specialist

October 2017
Outline

1. Context
   • ADB is scaling up the Health Sector
   • Health sector trends in Asia Pacific
   • Operational Plan for Health 2015-2020

2. Overview of the Sector
   • ADB’s health sector projects

3. Business Opportunities
   1. 2016 Approved Projects
   2. 2017 Pipeline
   3. 2018-2019 Tentative Pipeline
   4. Concrete Opportunities
1. CONTEXT
ADB scaling up the health sector

$17B
total operations in 2016

>80%
in infrastructure

3-5%
in health sector
By 2020

$341m
in 2016 invested in health
Healthcare trends in Asia Pacific

By 2025, **26%** of people worldwide will be older than 50, in Asia by 2030 there will be 615M people older than 65, double than today.

- **Aging society**
- **Increasing spending**
- **Rising expectations**
- **Advancing technology**
- **Shifting innovation**

Healthcare expenditure keeps **growing** and Asia Pacific social infrastructure demand is huge.

Patients increasingly using new channels to **engage in their health**, more knowledgable about products and services.

*Explosion of new technologies* on the way, e.g. big data, 3D printing, next-gen sequencing, advanced materials.

"Patient-centric" philosophy and personalized therapies ask for new R&D and R/A strategies.
ADB’s health sector approach
Meeting evolving needs

Demand
- Elderly Care
- Urban Health
- Health Security

Supply
- Equitable access to quality health care

Government commitment
Countries commitment to universal health coverage (SDG 3)
ADB’s Operation Plan for Health

Focusing and model building

- Strengthen health systems for Universal Health Coverage
- 1. Health infrastructure
  2. Health governance
  3. Health financing
- Focus on 8–12 ADB DMCs
- Build best practices, share knowledge, evaluate impact
2. OVERVIEW OF THE SECTOR
ADB’s health sector business lines and projects
Developing Integrated Hospital Care

- Pooling of State and health insurance funds
- Improving quality of care for disadvantaged groups, introducing evidence based care and standards

- PPPs

Innovative feature
- Infrastructure investment to develop model hospitals backed by strong ICT systems
- Hospital and primary care network with referral system
- Financial autonomy of hospitals

Project link
- Mongolia: Fourth Health Sector Development Project (Additional Financing)
- Mongolia: Fifth Health Sector Development Project (proposed)

Impact
- Improved quality of health services

Partnerships
- WHO

The next big thing
- Pooling of State and health insurance funds
- Improving quality of care for disadvantaged groups, introducing evidence based care and standards
- PPPs
Innovative feature
- Regional cooperation on public goods
- Infrastructure projects integrate preventive health activities (HIV)
- Neighboring provinces establish cross-border diseases surveillance, response to epidemics, patients referrals.

Project/program link
- Greater Mekong Subregion (GMS) Communicable Diseases Control Projects 1 + 2 in CAM, LAO and VIE
- GMS Health Security Loan

Impact
Control of communicable diseases with epidemic potential, malaria elimination.

Partnerships
WHO, Global Funds, IOM, International NGOs

The next big thing
- Interconnected network of sentinel laboratories for early warning
- Digital HMIS with integrated vertical diseases information systems

Strengthening Regional Health Security

Operational Plan for Health
2015–2020
Supporting Urban Primary Health Services

**Innovative feature**
- Innovation creation for service delivery models and knowledge generation in urban health integrated as Disbursement Linked Indicators
- First Result Based Loan in health

**Project/program link**
- India: Support for National Urban Health Mission
- Bangladesh-Urban Primary Health Care Services Delivery Project

**Impact**
Better health for urban poor

**Partnerships**

**The next big thing**
- Intersectoral convergence of urban health
- Patient centric Health Information System Management
- Service delivery through performance based PPP models
Supporting Elderly Care

Innovative feature
- Integrating social and health care
- Developing public private partnerships
- Supporting SOPs and quality care management

Project/program link
- PRC Hebei Elderly Care Development Project
- Yichang Hubei Elderly Care Services and System Demonstration Project
- PPP Demonstration Program to Transform Local Government Delivery of Elderly Care Services

Impact
- Elderly care systems developed
- Healthy aging

The next big thing
- Social and elderly care financing
- Service delivery through performance based PPP models
- ICT enabled elderly care
Investing in eHealth

Innovative feature
- Supporting interoperable and geo-enabled health information systems (HIS)
- Developing public private partnerships
- Strengthening capacity development and knowledge exchange
- Building ehealth investment cases

Project/program link
- Samoa Sub-marine Cable Project with ehealth component
- ICT as project component mainstreamed (Sri Lanka, Bhutan, Viet Nam, PNG)

Impact
- Advice DMC on best value ICT investments
- Developing sustainable ICT investments

The next big thing
- Development of Health Information Exchanges
- Standards and Interoperability lab powered by Asia ehealth Information Network interoperable laboratory
ADB collaborates with many partners

Help Age

Implementation

Knowledge

Financial

World Bank

DFID

Australian Government

Department of Foreign Affairs and Trade

Canada Foreign Affairs, Trade and Development

World Health Organization

UNICEF

Duke-NUS

Harvard University

The Global Research Alliance

London School of Hygiene & Tropical Medicine

Seoul National University

International Human Rights Program

University of Oslo

imshealth

Gilead
3. Expanding investment frontiers

Innovations in Program Design + Leveraging Health Outcomes

- Leveraging ICT in health
  - Finance mobile payments for health services
- Regional Health Security
- Water and Sanitation water safety plans
- Healthy Design
  - Urban development healthy cities
  - Transport road safety
- Health Bonds to mobilize financing for health
- Advancing cross sectoral features
  - Education skills for health workforce
  - Finance mobile payments for health services

Private sector as driver for health impact

50 Years ADB
ADB’s malaria and other communicable diseases trust fund (supported by DFAT)

1. Strengthened regional leadership
2. Increased financing for malaria and other communicable disease threats
3. Better access to quality drugs and commodities
4. Better use of information and communication technologies
5. Improved national capacity to detect and treat drug resistant malaria and other disease threats
6. Inclusion of malaria and communicable disease prevention in large commercial and development projects

Trust fund contributions are ending in June 2018.
Strengthening health systems
For regional health security

Malaria elimination

- Use of eHealth tools
- Regulation of pharmaceuticals
- Increasing health financing
- Disease surveillance
- Pharmaceuticals regulatory convergence

Strengthening national health systems

Fostering cross-border collaboration

Regional health security
ADB known for healthy design
ADB is strengthening health impact assessment

Healthy urban design
Healthy energy projects
Healthy water supply and sanitation
Private sector as a driver for health impact

**Traditional investment: Debt, Equity**

**The opportunity**
- The hospital sector needs 180 million new beds in the next 10 years;
- The pharma sector is expected to grow from US$214bn in 2010 to US$386bn by next year (annual growth rate of 13%)

✓ Investment activity is growing fast in health but mainly for upper income groups in tertiary care

  - Average Deal size is $36m;
  - Median deal size is $5m

**Non-Traditional investment**

**More focus on impact investments**

**ADB Impact investment Fund**
- Advance inclusive businesses
- Foster public private dialogue
- Facilitate knowledge sharing

- “Best of the Rest” health Infrastructure
- Affordable medicine
- Health Promotion
- Digital Health

/HOSPITAL/
3. Business Opportunities
Portfolio Overview
### 3. BUSINESS OPPORTUNITIES

#### 2016 Approved Projects

<table>
<thead>
<tr>
<th>Country</th>
<th>Project</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRC</td>
<td>PPP Demonstration project for Elderly care Services</td>
<td>$40m</td>
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<tr>
<td>Sri Lanka</td>
<td>Local Government Enhancement Project</td>
<td>$1m</td>
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<tr>
<td>Philippines</td>
<td>Social Protection - CCT</td>
<td>$175m</td>
</tr>
<tr>
<td>Cambodia, Lao PDR, Myanmar, Viet Nam</td>
<td>GMS Health Security Project</td>
<td>$125m</td>
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<tr>
<td>Country</td>
<td>Project</td>
<td>Amount</td>
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<td>-------------------</td>
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</tr>
<tr>
<td>PRC</td>
<td>Hebei Elderly Care Service System Delivery System</td>
<td>$80m</td>
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<tr>
<td>Mongolia</td>
<td>Ensuring Inclusiveness and Service Delivery with Disabilities</td>
<td>$12,5m</td>
</tr>
<tr>
<td>Uzbekistan</td>
<td>Primary Health Care Improvement Project</td>
<td>$45m</td>
</tr>
<tr>
<td>PNG</td>
<td>Rural primary healthcare delivery project</td>
<td>$17,5m</td>
</tr>
<tr>
<td>Private Sector (Reg)</td>
<td>Orbimed Asia III Equity Fund</td>
<td>$60m</td>
</tr>
<tr>
<td>Private Sector (India)</td>
<td>NCD care (to be approved)</td>
<td>$12m</td>
</tr>
<tr>
<td>Private Sector (Viet)</td>
<td>Health Infrastructure Guarantee</td>
<td>$75m</td>
</tr>
</tbody>
</table>
2018-2019 Tentative Pipeline

Central West Asia

Uzbekistan - Primary care, digital Health
Kazakhstan - Primary care PPP program

East Asia and Southeast Asia

Lao PDR - Health Governance program
Viet Nam - Health Commune, Medical Universities
PRC - Elderly Care
Philippines - Social Protection
Mongolia - Health sector dev

South Asia

India - Urban Health Health
Bhutan - Health service delivery, financing, HIS
Sri Lanka - Primary care, HIS, CDC

Pacific

PNG - Health Sector Reform
Tonga - ehealth project
Vanuatu, Tonga, Samoa, Tuvalu - System strengthening for vaccines introduction

SDCC 4 Health Experts
Private sector projects…
Concrete Opportunities – Check ADB CMS

https://uxdmz06.adb.org/OA_HTML/adb/adbpos/jsp/ADBCMSLogin.jsp

<table>
<thead>
<tr>
<th>Project</th>
<th>Sector</th>
<th>Consultant Source</th>
<th>Consultant Type</th>
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<tbody>
<tr>
<td>TA-8763 REG: HIA Coordinator (Thailand) (48001-001)</td>
<td>Health</td>
<td>National</td>
<td>Individual</td>
</tr>
<tr>
<td>TA-8763 REG: HIA Coordinator (Lao PDR) (48001-001)</td>
<td>Health</td>
<td>National</td>
<td>Individual</td>
</tr>
<tr>
<td>LOAN-2963 MON: Fifth Health Sector Development Project (45009-002)</td>
<td>Health</td>
<td>National</td>
<td>Individual</td>
</tr>
<tr>
<td>TA-8763 REG: Program Officer on Migration and Health (Output 1) (48001-001)</td>
<td>Health</td>
<td>National</td>
<td>Individual</td>
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<tr>
<td>TA-8763 REG: Results for Malaria Elimination and Control of Communicable Disease Threats in Asia and the Pacific (48001-001)</td>
<td>Health</td>
<td>International</td>
<td>Individual</td>
</tr>
<tr>
<td>TA-8763 REG: Regulatory Expert (48001-001)</td>
<td>Health</td>
<td>International</td>
<td>Individual</td>
</tr>
</tbody>
</table>
Useful Links

While health may not be everything, everything is nothing without health.

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Health Sector Website: http://www.adb.org/sectors/health/main
THANK YOU!

ANY QUESTIONS?
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• ADB Focus Areas: Opportunities - [www.adb.org/focus-areas](http://www.adb.org/focus-areas)

• ADB project details - [www.adb.org/projects](http://www.adb.org/projects)

• ADB’s Procurement Guidelines - [www.adb.org/documents/procurement-guidelines](http://www.adb.org/documents/procurement-guidelines)

• Business intelligence can be collected through consultancy recruitment notices, country partnership strategies and operations business plans. Register in ADB’s Consultant Management System – [www.cms.adb.org](http://www.cms.adb.org)
2018 AUSTRALIAN CONSULTING SERVICES MISSION TO THE ADB BUSINESS OPPORTUNITIES FAIR, MANILA – MARCH 2018

• ADB BOF 2-day Educational conference and networking forum - ADB funded projects and procurement opportunities
• Over 600 international consultants, contractors, manufacturers and suppliers
• Additional Austrade sessions:
  › pre-departure briefing with ADB Executive Directors - Australian Constituency
  › one-on-one meetings and knowledge-sharing sessions with ADB officers
  › networking reception
  › briefings with other multilateral banks and aid agencies (e.g. World Bank, UN, USAID, GIZ, DFAT, Development platforms, executing agencies, local contractors)

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