

Building a healthier Asia:

**empowering more equitable
access to healthcare innovation**



Key takeaways from Zuellig Pharma's
2nd Healthcare Access Summit



PRMA Consulting, part of Fishawack Health, is proud to be the Knowledge Partner for Zuellig Pharma's 2nd Healthcare Access Summit on 'Building a Healthier Asia: empowering more equitable access to healthcare innovation'.

Leveraging our strategic insights and extensive knowledge of the market access landscape in the Asia-Pacific (APAC) region, we designed the Summit agenda to cover the key enablers and barriers to healthcare innovation in this region.

Read on to learn what our diverse group of experts has to say on key access topics relating to strategic partnerships, trust, digital health, supply chain, and healthcare financing to improve patient access to healthcare innovations.



Jeff Weisel
Managing Director
APAC

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Opening address: Achieving equitable access to healthcare innovation in a complex region

Chief Executive Officer of Zuellig Pharma, John Graham, officially kicked-off the Summit with his opening remarks. Chris Humphrey, Executive Director of the EU-ASEAN Business Council, then shared more about the collaborations between the EU and ASEAN and how that supports patient access to healthcare.

Key takeaways:

While breakthroughs in innovation have transformed the quality of delivery of care, they have, in some cases, widened existing gaps in healthcare access and equity across and within markets in Asia.

Closing these gaps will require building trust among stakeholders in the healthcare system and developing strategic partnerships, and addressing barriers relating to healthcare financing, the availability of healthcare services, and the supply and distribution of products.

The EU-ASEAN association aims to facilitate trade and investment between Europe and ASEAN, with an increasing focus by advocacy groups to discuss how access to innovation can be enhanced in ASEAN. This is particularly important as aging populations are a common trend across ASEAN member states, and the ASEAN Economic Community Blueprint 2025 has made improving the healthcare for all, especially the elderly, a priority.

Speakers



John Graham,
Chief Executive Officer,
Zuellig Pharma



Chris Humphrey,
Executive Director,
EU-ASEAN Business Council

Keynote: Achieving equitable access to healthcare innovation in a complex region

Speakers provided a deep dive into the Philippines, exploring what it means for ASEAN countries to achieve access to healthcare innovation for all, and learnings for other countries to address healthcare infrastructure challenges.

Key takeaways:

In the Philippines, there is a disparity in access to healthcare services for patients living in the geographically isolated and disadvantaged areas (GIDA) in the country. To provide quality healthcare services for all Filipinos, the Philippines has introduced rational reallocation of healthcare infrastructure and equipment aligned with the Philippine Health Facility Development Plan, where infrastructure requirements to build healthcare provider networks are calculated and the role of the private sector is included. To promote equity, a higher allocation of financing and human resources is assigned to underserved than to well-served areas.

Additionally, under the Department of Health-Human Resources for Health Master plan, investments in human resources are necessary to enable access to equitable primary care.

In most countries where government funding may be more limited by resource constraints, including the Philippines, there are opportunities for public partnerships with private payers, patient groups, and pharma companies, as well as other stakeholders, to make innovative treatments more accessible, and for addressing supply chain barriers that can reduce access due to cost, infrastructure, or even regulatory restrictions.

Some companies, especially smaller biotechnology firms from outside the region, may not have the capacity to reach markets and patients in Asia without partners. Similarly, smaller markets may need to be open to more creative approaches to becoming attractive destinations for companies to invest in patient access.

Equitable distribution of innovative treatments and access to them is critical to strengthen healthcare system resilience and requires the public sector and private sector to collaboratively leverage one another's strengths to offer a unified response to crises or threats.

Speakers



Rosario Vergeire,
Officer-in-charge,
Department of Health,
Philippines



Rehan Q. Saghir,
EVP,
Zuellig Pharma Therapeutics

Partnering for health: Building strategic partnerships to achieve goals for access and equity

Speakers discussed how collaboration between different public and private players in the healthcare ecosystem can address gaps in access due to financial, infrastructure, and regulatory barriers in Asia.

Key takeaways:

Collaboration with multiple stakeholders is essential as it can aid in aligning objectives, achieving key outcomes, and overcoming financial barriers.

Key players in improving access and equity include private equity firms, specialty care providers, generic and big pharma manufacturers, donors (both private and public), international organizations (e.g., International Finance Corporation, world bank), government, policymakers and regulators, large healthcare groups/organizations, and patient associations.

There is an increasing flow of funds into the Asia region and all stakeholders will need to work together to optimize the use of these funds.

- To increase the supply of newly trained medical professionals and adoption of modern technologies in emerging markets, some funding will need to be channeled to training.
- Greater investment in medical tourism could be considered with different countries being specialists for different therapeutic areas to optimize resource allocation.
- Insurance penetration in emerging markets in Asia is low. Strategic partnerships and/or designing access programs with multiple stakeholders will be useful.

Harmonizing the regulatory framework across countries would optimize expedited access to innovative treatments.

Technology-backed businesses will be essential in driving growth and healthcare innovation.

Speakers



Ada Wong,
Public Affairs Lead,
APAC, Sanofi



Giles Newmarch,
Senior Investment Officer
Health & Education,
International Finance
Corporation (part of
World Bank)



Ewan Davis,
Partner, Quadria Capital

Moderator



Robert Kruit,
Executive Vice President,
Business Development &
Strategic Partnerships,
Zuellig Pharma

Trust your doctor? Securing trust in the healthcare system: how does this help drive access and equity?

Speakers discussed the critical role of a top-down, transparent culture of compliance with all legal, professional, and ethical compliance standards in healthcare across stakeholder organizations, and having the necessary checks and balances in place, to ensure a patient-centric approach to achieving better health outcomes.

Key takeaways:

Meaningful relationships in healthcare are fundamentally built on trust; patients put their faith in the healthcare system to deliver better health outcomes, and in doctors, industry, medical associations, and the supply chain for reliable and high-quality information and products.

Trust is created by being patient-centric, physician-centric, and putting an emphasis on product quality. This also means taking external points of reference, engaging all stakeholders in a transparent manner (experts, government, industry), and disseminating accurate, relevant, and high-quality information at two levels: individual (i.e., patient and physician) and group (i.e., medical and industry association, regulatory and HTA/reimbursement/pricing agencies).

There is a need for policies, procedures, and initiatives to have a high standard of ethics and integrity. However, beyond just simply becoming rules-based operational set-ups, a culture of compliance with healthcare legal and ethical standards also needs to be instilled top-down in all organizations.

To drive higher standards in markets where partnerships with multiple stakeholders exist, some actions need to be taken, such as synchronizing compliance codes of conduct across organizations and stakeholder types, promoting and ensuring enforcement of these codes at a cross-stakeholder level, calling out non-compliant behaviors by pulling in regulators, and especially holding leadership and key contributors to the highest standards of ethical codes, and more.

Speakers



Campbell Clark,
Vice-President Legal and Compliance, APAC, Medtronic



Gareth Lee,
Chief Compliance Officer & Asia Pacific General Counsel, Cordis



Redentor Romero,
Head of Compliance – Corporate, Zuellig Pharma

Moderator



Maija Burtmanis,
General Counsel & Chief Compliance Officer, Zuellig Pharma

Health in your pocket: Leveraging digital solutions to empower community-centered and patient-centric care models

Speakers discussed how digital innovations and technologies can help bridge the access gap by improving patient-centricity and accessibility to healthcare, and more importantly, giving patients and consumers greater autonomy over their own health in a safe and secure manner.

Key takeaways:

Digital technologies result in improvement in patient access, with care being decentralized.

- Telemedicine improves access, especially if patients are in rural areas.
- Sharing data enables patients to receive more personalized care, supported by potential in-built analytics to inform patients of key insights along their healthcare journey.
- COVID-19 has accelerated/catalyzed the use of telemedicine, by highlighting the convenience and benefits of digital health in ensuring better access to care.

Key barriers to digital transformation include lack of trust in the digital tools, technical considerations/digital penetration gap in some regions across ASEAN, and regulatory capabilities to evaluate digital products.

- Adoption of digital tools would require the public sector to take the first leap and provide a conducive environment for collaboration with private sectors

It is hoped that over the next 5 years there will be an expansion in the number of services offered, improved autonomy for patients (ownership of their health data), moving from “data in your pocket” to “analytics in your pocket”, improved digital maturity across all Asia countries, and a focus on preventative health rather than just treatment.

Speakers



Dr Julian Sham,
Healthcare Lead,
Asia Pacific & Japan,
Amazon Web Services



Snehal Patel,
Co-founder, MyDoc



Dr Num Tanthuanit,
EY-Parthenon Partner,
Health, Ernst & Young LLP



Clive Tan,
Asst Chief, Group Integrated
Care (Population Health),
National Healthcare Group

Moderator



Daniel Laverick,
SVP & Head of Digital & Data,
Zuellig Pharma

The last mile to healthcare: Reimagining strategic supply chains to ensure equitable supply across and within markets

Speakers discussed how the supply chain will evolve to accommodate the new decentralized healthcare delivery paradigm, and how it can support equitable supply of healthcare products in different markets.

Key takeaways:

The supply chain has become an increasingly important factor in ensuring access. However, the current healthcare supply chain in APAC faces multiple challenges, such as a lack of regional visibility on demand of healthcare products, geo-political influences, and significant variations and complexities around country-specific/cross-region infrastructure, economy, and human resources requirements and capabilities.

- Issues regarding sustainability, especially on reducing waste, were also discussed, as 50% of vaccines were wasted globally due to the lack of sufficient cold-chain capabilities, according to WHO estimates.

Several key elements/aspects to improve supply chain efficiency and capability in the APAC region were proposed, including collaborations with various stakeholders to establish a cross-regional supply chain community, improving regional infrastructure, more efficient and transparent data and knowledge sharing across markets. It was also proposed that supply chain providers should improve the visibility of demand, and trace and track demand and supply more effectively, as well as improving knowledge transfer and capability-building at a local level.

- Establishing alternative supply channels to reduce the reliance on a single country, e.g., China, and exploring a standard approach regarding packaging can support efficiency in the movement of healthcare products.
- To ensure the safety and sustainability of the healthcare product supply chain, continuous investment is needed to: improve the local infrastructure for manufacturing so that products are made closer to where patients are treated, thus reducing the risk of delays in the supply chain; attracting supply chain talents to the region; and encouraging innovation.

Speakers



Law Chung Ming,
Executive Director, Transport & Logistics, Enterprise SG



Alexandra Riha,
Regional Head Supply Network Operations Asia Pacific, Merck Healthcare



Ishita Dhamani,
Partner (Life Science and Health Leader, Supply Chain Competency Leader ASEAN), Ernst & Young



Chris Cave Jones,
Regional Director, Argon & Co

Moderator



Brett Marshall,
Corporate Head, Quality Assurance & HSSE, Zuellig Pharma

Moving from “Wealth = Health” to “Health = Wealth”: Building value-based healthcare financing models that deliver equitable access

Speakers discussed how different healthcare systems are evaluating and financing the introduction of innovative medicines and other new technologies that can improve patient outcomes and support equitable access.

Key takeaways:

In single-payer systems such as Taiwan, innovative models have been implemented to improve patient care, such as the use of cloud storage for patient medical data, reimbursement framework to validate the real-world benefits of new treatments, and value-based payment model enabled through analysis of big data from TW NHI Research Database.

In Singapore, the recent Healthier SG policy has led to more investment in preventive health to support a higher quality of life and control cost inflation.

Private organizations, such as pharmaceutical companies, expressed the desire to be viewed by governments more as “partners” than “vendors”, and encouraged transparent discussions that could give rise to new sustainable financing models to improve patient access to innovative treatments.

Innovative financing models are even more critical in emerging markets where access to basic healthcare for all remains a high priority.

- To prevent over-burdening the healthcare system, value-based pricing model can be used to support patient access to new treatments.

The role of insurance companies is critical in filling the healthcare funding gaps that governments are unable to cover due to limited budgets.

Employers are in a position where they could play a more active role to support the financing of treatments for their employees, since majority of employees would have a corporate insurance scheme.

Speakers



Dr. Lee Po-Chang,
Director General, National Health Insurance Administration (NHIA) Taiwan



Dr. Jeremy Lim,
Director for Global Health, Saw Swee Hock School of Public Health, National University of Singapore



Dr. Hsien-Hsien Lei, PhD, CEO,
The American Chamber of Commerce in Singapore (AmCham)



Silver Chen,
Oncology Access Implementation Lead, Emerging Markets, Pfizer

Moderator



Jeff Weisel,
Managing Director, APAC, PRMA Consulting Ltd.

Closing remarks and summary of Summit

Closing remarks and a summary of the Summit highlights and key takeaways were delivered by Jean-Gaetan, Regional Director, Government Affairs & Sustainability of Zuellig Pharma, and Tony Estrella, Event Host, Author & Strategic Futurist on Personalised Health & Health Equity @ Taliossa.

Key takeaways:

Learnings from the COVID-19 pandemic have shown what is possible in terms of expediting the launch of new innovative treatments for patients, and relevant lessons should be thoughtfully reviewed and applied to other therapeutic areas.

Ongoing conversations and knowledge exchange should be encouraged to identify new and improved ways of working for all stakeholders in the healthcare ecosystem, to enable improved patient access to innovative healthcare solutions in Asia.

There is a need for the industry to double down on sustainability efforts, to put patients at the center of approach, decarbonize operations and energize organizations around the topic of equitable access to healthcare.

Key insights from the Summit will be consolidated into a whitepaper designed with PRMA Consulting, EU-ASEAN Business Council and healthcare experts, and will be shared with participants and key stakeholders in the public sector.

Speakers



Jean-Gaetan Guillemaud,
Regional Director, Government
Affairs & Sustainability of
Zuellig Pharma



Tony Estrella, Event Host,
Author & Strategic Futurist on
Personalised Health & Health
Equity @ Taliossa





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**KNOWLEDGE
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