2023 Healthcare Trends in Emerging Markets: A Look Ahead

SPEYSIDE

CORPORATE AFFAIRS & PUBLIC POLICY

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Executive Summary

After being hit the hardest by the pandemic, many emerging market stakeholders are now looking for impactful, long-term partnerships with global healthcare companies that add real value to local populations. Those companies that step-up and structure meaningful partnerships will reap benefits over time in terms of reputation, relationships and market access. However, any such partnerships need to be rooted in a deep understanding of the local environment.

Speyside Group, a global emerging markets corporate affairs and public policy specialist, has analyzed the landscape for healthcare in emerging markets and identified some trends that will shape healthcare systems in the near term. This report contains a brief analysis of the main trends and opportunities that 2023 will bring in the following areas:

The challenge of healthcare affordability amid increasing healthcare costs.

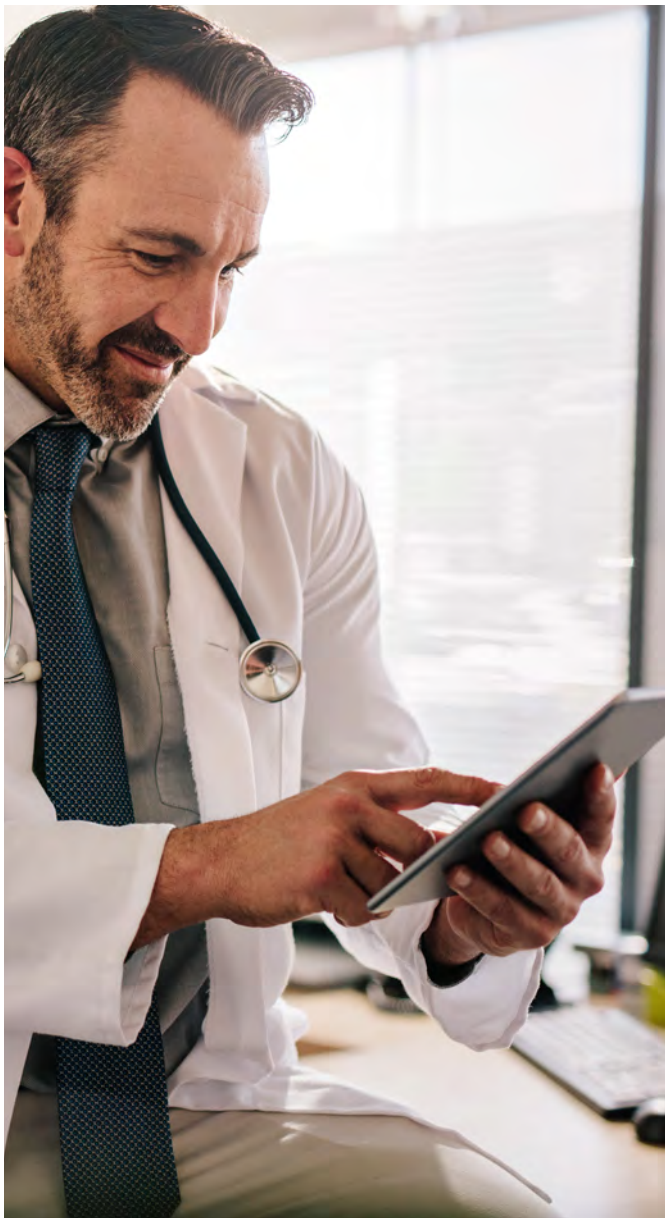
As the world economy slows down, healthcare costs are rising at an alarming rate in both developed and emerging economies. As out-of-pocket spending is also rising, governments have the challenge to increase access to innovative therapies while still meeting the existing healthcare costs. Understanding local drivers and gaps in the capacity to implement innovative agreements will be vital in 2023.

The shift towards prevention focused healthcare systems.

With the rise of non-communicable diseases (NCDs) there is a growing realization that a preventive approach is needed, placing more emphasis on health promotion and disease prevention, rather than treatment. In this context emerging markets need to improve communication and engagement pathways for stakeholders in both primary care and specialty care.

Market access in the context of regulatory harmonization and reliance.

In the last few years, national regulatory agencies (NRAs) showed they have the capacity to speed up regulatory approval processes and thus accelerate access to innovation. NRAs in emerging markets will be challenged to maintain this level of agility in the post-pandemic reality. Regulatory harmonization and reliance will be key in preventing backlog accumulation and promoting access to innovation.



Impactful collaboration to contribute to enhanced innovation capacity across the globe.

The COVID-19 pandemic has made it evident that it is crucial to find better alternatives and frameworks to enhance science and innovation capacity across the globe. Achieving this will require a creative approach from all involved stakeholders to design collaborations that generate long-term and sustained capabilities to innovate. Companies operating in emerging markets will need to take the latter into account to support these markets so they can increase capacity to be an innovation-propeller.

Lasting changes in healthcare dynamics and patients after the pandemic.

The COVID-19 pandemic has caused a significant lag in NCD diagnosis and management. In a context of scarce fiscal space, emerging markets will need ample public-private cooperation to catch up on NCD diagnosis and to find collaboration opportunities between central and local governments, academia and civil society while strengthening their local relationships and footprint.

Integration of AI, technology, and data analysis for healthcare decisions.

Many healthcare systems have focused on investing in digital health solutions and technology to become more efficient. Healthcare business leaders should seek for opportunities to collaborate with policy decision makers to foster the use of new technologies and ensure that their new developments are accessible.

Climate Change & Healthcare.

According to the WHO climate change is currently the single biggest health threat to human health. While there is an increased awareness for climate action, the investment of resources has not necessarily met the needs at a global scale. The collaboration between public and private stakeholders will be key in 2023 to make the delivery of healthcare services and goods more efficient and sustainable.

THE CHALLENGE OF HEALTHCARE AFFORDABILITY AMID INCREASING HEALTHCARE COSTS

As the world economy slows down, healthcare costs are rising at an alarming rate. This is a major concern for healthcare systems around the world, as they grapple with the challenge of how to provide quality care while containing costs. In developed economies, healthcare costs are rising at a time when government budgets are under strain. This is also true in many emerging markets, where health systems are often underfunded and lack the capacity to cope with rising costs.

Inflation and low growth are rampant across developed economies, with many seeing inflation levels unheard of in the 21st century. Despite challenging external conditions, emerging markets are forecast to grow at a faster pace than developed economies in the next few years. Emerging markets resiliency will help them cope with increased financial pressure on their healthcare system and maintain macroeconomic stability favorable to foreign investment. This provides a window of opportunity for healthcare companies looking to enter or expand their operations in these markets.

In response to this, many emerging markets will be looking to actively manage healthcare costs, especially in developing economies where out-of-pocket expense (OOPE) can be bankrupting for many. In India, a World Health Organization (WHO) report from March 2022 estimated that high OOPE on health is impoverishing some 55 million annually, with over 17 per cent households incurring catastrophic levels of health expenditures every year. According to World Bank data, after a decade of rapid decline OOPE reached its lowest in 2017 with 27.79% of overall health spending in the Latin-America and the Caribbean (LAC) region and increased to 28.35 in 2019. As estimated by the Economic Commission for Latin America and the Caribbean (CEPAL, for its acronym in Spanish) OOPE reached 32.2% of total health spending in the LAC region due to the COVID-19 pandemic. Meanwhile, most emerging markets exceed the WHO's recommended maximum of 20 per cent OOPE of total health expenditure. The risk of not tackling health affordability is to keep increasing inequity in healthcare systems, further moving emerging markets away from the goal of universal health coverage.

Over the past 20 years, there have been approximately 65 drugs launched with annual treatment cost over $200,000 with this number estimated to double over the next five years, according to IQVIA. This makes governments ask themselves increasingly how to achieve access to innovative therapies while still meeting the existing healthcare costs and ongoing demands of its population. Value-based contracting will be a critical tool for global healthcare companies to achieve access in emerging markets in the context of a global slowdown coupled with increasing healthcare costs. Understanding local drivers and gaps in the capacity to implement innovative agreements, such as data gaps or local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THE SHIFT TOWARDS PREVENTION FOCUSED HEALTHCARE SYSTEMS

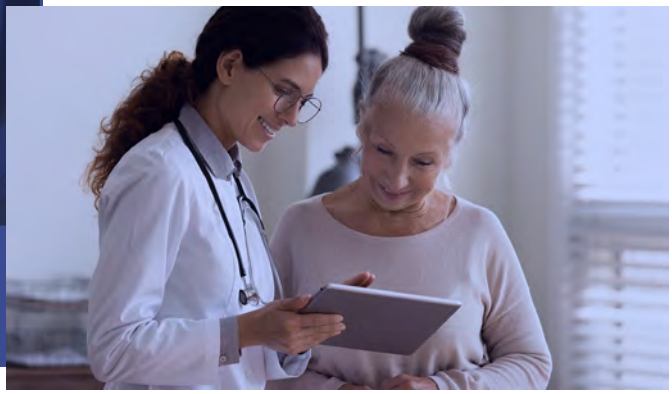
Another trend that is expected to have an impact on healthcare in emerging markets is the shift from a reactive to a preventive approach to healthcare. In recent times, most healthcare systems have been geared towards treating illness, rather than preventing it. This means healthcare systems treat diseases late and at their costliest point, generating massive healthcare costs and subpar patient outcomes. A global economic slowdown could cause many to migrate from private healthcare systems to public systems or increase OOPE, causing further pressure on strained finances and making preventive care increasingly needed to reduce costs.

With the rise of non-communicable diseases (NCDs), such as diabetes and cardiovascular diseases, there is a growing realization that a preventive approach is needed, placing more emphasis on health promotion and disease prevention, rather than treatment. To reach the potential of preventive systems, emerging markets will need to improve communication and engagement pathways for stakeholders in both primary care and specialty care. Increasingly, there will be a need to improve the integrated and specialized knowledge of healthcare professionals while improving healthcare literacy among all sectors of the population. This might be a key moment for healthcare organizations to work together outside of their common silos of therapeutic areas and activities and build joint projects that connect all stages of healthcare.

CASE STUDY: HEALTHIER SINGAPORE

In Singapore, the government's healthcare expenditure has tripled from $3.7 billion in 2010 to $11.3 billion in 2019 (2.2% of GDP) and could reach $27 billion (3.5% of GDP) by 2030. In recent months, the government has presented the Healthier SG white paper to parliament; the latest government healthcare strategy intended to drive a focus on keeping people healthy rather than treating ill health, and ultimately to reduce the rising costs of healthcare. The ambitious 10+ year strategy, if successful, will shift from a health system that reactively cares for the sick, to proactively preventing individuals from falling ill, and drive efficiency into the system. The program is expected to cost the government S$1 billion (US$0.7 billion) in set up costs over the next 3 to 4 years, and S$400 million in running costs annually, representing double the budget spent on preventive healthcare today.

Healthier SG will be rolled out in phases, with the first focused on Singapore residents aged 60 years and above who will enroll with a family doctor from mid-2023. In the medium term, overall funding for the Singapore public health system will move to a capitation model where each health cluster will receive a budget based on the size of its population, rather than the number of services being delivered. The budget per person will be tiered based on the health risk, so the elderly and children will sit in a higher tier and receive a larger budget. This is a major and ambitious shift and brings the Singapore system into alignment with many other countries with developed public health systems that want to drive efficiency rather than activity.



CASE STUDY: SELF-CARE IN LATIN AMERICA

On the occasion of the 75th WHO World Health Assembly, the Global Self-Care Federation (GSCF) launched the Global Social and Economic Value of Self-Care study on a ceremony in Geneva, Switzerland. Some of the highlights of the research conducted in eighteen countries across four continents showed that self-care can lead to savings of nearly USD 120 billion each year for global healthcare systems.

However, emerging markets have a long way to go to fulfill the potential economic value of self-care. The GSCF launched the Self-Care Readiness Index 2.0, a research and policymaking tool which explores the key enablers of self-care and gives countries a score ranging from 1 (not self-care ready) to 4 (exceptionally self-care ready). Colombia scored a 2.9 while India scored a 2.7; Indonesia a 2.73; Kenya a 2.38; Mexico a 3.03; Singapore a 3.16; and UAE a 2.72. Improvements in patient empowerment, self-care health policy, and the regulatory environment will be necessary to bridge the gap between potential and real economic value of self-care. The first and second edition of the Self-Care Readiness Index have confirmed that Low- and Middle-Income Countries (LMICs) were more likely to utilize multidisciplinary care teams and empower practitioners such as pharmacists and community health workers to deliver care and educate patients on self-care behaviors. This brings a vast array of opportunities for the implementation of innovative patient engagement strategies to achieve better health outcomes while improving the efficiency of public healthcare systems.

MARKET ACCESS IN THE CONTEXT OF REGULATORY HARMONIZATION AND RELIANCE

In the last few years, national regulatory agencies (NRAs) showed they have the capacity to speed up regulatory approval processes and thus accelerate access to innovation with the swift approval (for emergency use only in some cases) of COVID-19 vaccines and treatments. NRAs in emerging markets will be challenged to maintain this level of agility in the post-pandemic reality. Regulatory harmonization and reliance will be key in implementing regulatory best-practices that ensure agility, prevent backlog accumulation, and promote access to innovation.

Increased regulatory reliance can help emerging market NRAs achieve friendlier and more efficient regulatory pathways that increase the access to innovative treatments and interventions in geographies who are usually in the second and third waves of access. This increased access can, in consequence, contribute to decreasing universal health coverage gaps. Regulatory harmonization can reduce the costs of regulatory processes in already financially strained health systems. For example, many emerging markets do not have a fast-track approval process for OTCs and low –risk medicines. This means that NRAs are using their scarce resources in an ineffective way. Regulatory harmonization and fast-track processes could allow NRAs to focus on the registration and safety of complex and innovative medicines.

Latin American NRAs are increasingly involved in regulatory harmonization and reliance initiatives. For example, the Colombian and Mexican regulatory agencies, ANVISA and COFEPRIS, are members of the International Council for Harmonization of Technical Requirements for Pharmaceuticals for Human Use (ICH). However, there is still a long road ahead to achieve a significant level of regulatory harmonization in Latin America and other emerging markets as regulatory pathways are painfully heterogenous, complicating launch and access planning for global healthcare companies.

MORE EFFICIENT REGULATORY PATHWAYS CAN IMPROVE THE ACCESS TO INNOVATIVE THERAPIES

IMPACTFUL COLLABORATION TO CONTRIBUTE TO ENHANCED INNOVATION CAPACITY ACROSS THE GLOBE

The pandemic has amplified the existing challenges in healthcare access and evidenced healthcare inequality. In this new context, there is a need to revisit models of collaboration and partnership that can contribute to an enhanced innovation capacity in emerging markets. Innovative pharma companies should be at the center of impactful pathways and new approaches involving all stakeholders already part of the healthcare ecosystem but also considering bringing new partners to this discussion, especially those who have tracked records of successful innovative partnerships in other sectors.

The new approach to enhance long-standing innovation capacity will not be a one-size-fits-all. Discussion of innovation in healthcare often goes to a point of placing access to innovation vs. intellectual property (IP) protection. Considering learnings from pandemic, opening patent of existing products not necessarily means immediate capacity to create innovative products. Several COVID-19 vaccine producers either opened their patents or announced that they would not be enforcing patent protection during the pandemic. However, this did not result in a flurry of vaccine manufacturing sites opening across the world. Other factors apart from IP made this difficult. Namely, most developing countries not necessarily had the necessary combination of factors required. On the other hand, countries that had experience in generating long term impactful partnerships in science and innovation, like India's Serum Institute or federal laboratory Butantan in Brazil, were the ones that were better prepared for local COVID-19 vaccine production. Additionally, countries that had regulations in place to facilitate clinical trials and the local scientific knowledge to implement them, had COVID-19 vaccination programs in place earlier and were able to reduce the infection curve in a more effective manner.

That means that the discussion might be more fruitful if the new approach is focused on the support and contribution to strengthen multiple levels of science and technology capabilities. This can be translated in revising productive partnerships – an important model already in place in specific emerging markets – and take it to the next level so these markets can be more often launching innovative products and also becoming patent holders. This revised approach should also involve building open innovation scenarios; university-startups-private sector collaboration to boost R&D capacities; support to strengthen NRA and also HTA bodies capabilities to evaluate and approve innovative products; sponsoring multilateral forum to exchange findings and best cases; support to improve organizational skills of the public administration; strengthening clinical trials framework; sponsoring initiatives very focused on primary care and local-level healthcare initiatives; among many other possibilities. To sum up, in 2023, global healthcare companies will need to work together on-the-ground with local health ecosystems to strengthen capacities in science and innovation.

CASE STUDY: IMPROVING MARKET ACCESS BY MAKING PATENTS REGISTRATION PROCESSES MORE EFFICIENT IN BRAZIL

Brazil has recently made efforts to reduce the bureaucratic burden on patent registration by amending its legal framework. A new law was passed (Law No. 14,195/2021) consolidating the National Industrial Property Institute (INPI) primary legal jurisdiction to review patent applications. Previously, ANVISA's consent was required to proceed with applications that referred to pharmaceuticals. The new framework provides legal certainty to all parties involved since the roles of INPI and ANVISA in the patent registration process have been subject to legal disputes.

ANVISA still has jurisdiction to approve pharmaceuticals for commercialization in the Brazilian market. This is an example of how openness to eliminate regulatory barriers can improve access to innovation while maintaining the necessary level of scientific scrutiny to ensure safety and efficacy. The COVID-19 pandemic has highlighted the need to make regulatory approval processes as efficient as possible to improve access to innovation and mitigate global health risks. As NRAs and patent registration authorities in emerging markets are taking steps to improve their efficiency, their needs for technical assistance and capacity building represents opportunities for industry organizations.

BRAZIL'S OPENNESS TO ELIMINATE REGULATORY BARRIERS CAN IMPROVE ACCESS TO INNOVATIVE THERAPIES WHILE MAINTAINING THE NECESSARY LEVEL OF SCIENTIFIC SCRUTINY TO ENSURE SAFETY AND EFFICACY FOR PATIENTS.

LASTING CHANGES IN HEALTHCARE DYNAMICS AND PATIENTS AFTER THE PANDEMIC

The effects of the pandemic on healthcare systems, patients, and consumers will be long seen in 2023 and beyond, with fundamental changes occurring in healthcare dynamics in emerging markets. Several years of massive increases in health budgets and the prioritization of COVID-19 management over diseases with similarly high burdens have caused a significant lag in NCD diagnosis and management. Diabetes, mental health, and obesity are on the rise as the pandemic ends. Governments will need to reconcile pandemic preparedness and budgets for routine COVID-19 vaccination with the urgent need to strengthen preventive care and reduce the burden of NCDs. In a context of scarce fiscal space, emerging markets will need ample public-private cooperation in this realm.

The race to catch up on NCD diagnosis will present an opportunity for healthcare companies operating in emerging markets to collaborate with central and local governments, academia and civil society while strengthening their local relationships and footprint. The pandemic also catalyzed the use of telemedicine and other technological tools to increase the availability of healthcare services. This brings a new array of opportunities to improve patient journeys and leverage the renewed interest in rethinking how technology can be used to promote access to healthcare in different settings, especially in low- and middle-income countries that face significant coverage and accessibility challenges.

The pandemic has also deeply shifted consumer behavior and their relationship with their health. Now, most people are comfortable performing an at-home COVID-19 test, which has resulted in more acceptance and increased use of home-based tests for monitoring and informing health. This new ownership of health is set to continue and will lead patients to be more engaged with technology to manage their health. This shift towards a point-of-care at home approach will present an opportunity for innovative diagnosis campaigns, especially for therapeutic areas where prevention results in significant value and savings for the healthcare system like HPV. On the other hand, there will also be an increased need for investment in health literacy so consumers can have a safe and effective digital health journey. For example, regulatory advances to allow for e-labelling and a safer e-commerce ecosystem for prescription and over-the-counter medications.

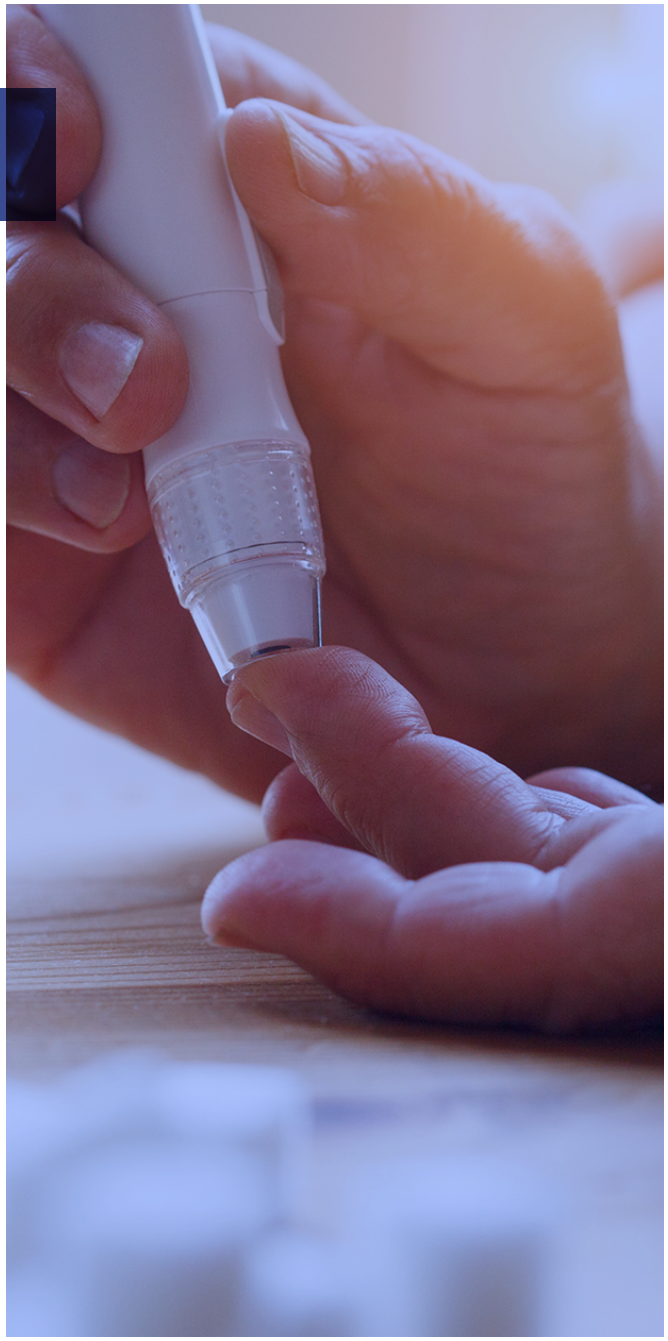
INTEGRATION OF AI, TECHNOLOGY, AND DATA ANALYSIS FOR HEALTHCARE DECISIONS

Healthcare is moving towards a more data-driven future, and emerging markets are no exception. The barriers to access for AI, machine learning and advanced data analytics in 2023 will be lower than ever with many accessible in software-as-a-service (SAAS) models via the cloud that can be operated without any coding knowledge. The impact of AI is far reaching in healthcare – from early detection, diagnosis, treatment, patient experience, research, disease monitoring, treatment adherence through to customer experience.

In recent years, many healthcare systems have focused on investing in digital health solutions and technology. This has been a major emerging trend in healthcare, and one that is here to stay. Soon, AI will play an increasingly significant role in healthcare, from diagnosis and treatment to preventive care. AI has the potential to make healthcare more efficient while maintaining or improving the quality of services. It is estimated that these developments could save health economies globally $150 billion by 2026. With increased access to state-of-the-art technology, there is an opportunity for healthcare companies to provide innovative and integrated solutions that can help improve patient outcomes and make healthcare delivery more efficient while expanding access. In some emerging markets, such as Argentina and Mexico, decision makers have made efforts to prepare the landscape for the digitalization of health information, but the implementation of these systems has been inconsistent.

It is increasingly necessary for healthcare business leaders to understand how AI, machine learning, and other technologies will impact the industry, especially in emerging markets. However, it is equally important to communicate the benefits of AI to policy decision makers so they can take measures to foster its use and refrain from hindering their potential. We are already seeing real-life applications of the technologies mentioned above in emerging markets and will soon see the regulatory and policy landscape for these technologies develop. Thus, it is key to create synergy between innovators and authorities to ensure that new developments can reach populations.

CASE STUDY: AI APPLICATIONS IN DIABETES



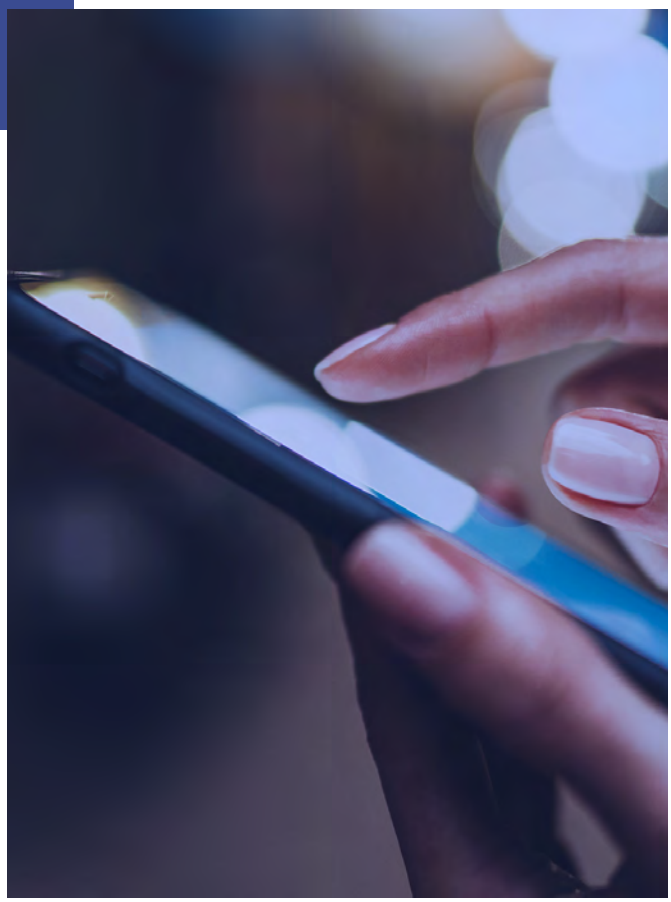
In India, NITI Aayog, a public policy think-tank linked to the government, has been testing the application of AI in primary care for early detection of diabetes complications, and is currently validating the use of AI as a screening tool in eye care, by comparing its diagnostic accuracy with that of retina specialists. Meanwhile, in Singapore, researchers have developed an AI screening technology capable of identifying retinal images showing signs of diabetic retinopathy with high accuracy. In 2021 Diabetes Singapore, a health organization, screened over 14,000 patients.

"In communities and countries without existing eye screening programs and without sufficient ophthalmologists — such as developing countries, parts of China, India, South America — AI accelerated eye screening technologies can be used as a first line screening tool to accurately screen for cases that require referral to an ophthalmologist for treatment," Prof Wong Tien Yin, Vice Dean (Clinical Sciences) at Duke-NUS Medical School.

Similarly, in Singapore, the government is currently leveraging machine learning and deep algorithms to mine the data of approximately five million citizens to identify people who are pre-diabetic, and then recruit this population to specialized programs that generate nudges for appropriate diet and exercise habits. Early diabetes prevention could save healthcare systems millions in costs associated to comorbidities.

The regulatory environment for these technologies is underdeveloped in emerging markets, with many regulatory agencies still building the capacity to design regulation around data privacy and ethical issues surrounding AI and related technologies in healthcare. Some emerging markets are also facing challenges to adapt market approval and HTA processes for these technologies. The input of patients, academia and local health-tech ecosystems will be vital in the construction of future regulatory policies. This presents an opportunity for companies to engage with stakeholders and the local health-tech ecosystems to shape policy and regulation so emerging markets can unlock the potential of these technologies in the healthcare space.

CASE STUDY: A MOBILE APP THAT IMPROVES LAST-MILE MEDICAL LOGISTICS IN NIGERIA



Lend an Arm is a mobile application developed by Healthbotics Limited, a Nigerian company, in partnership with the Nigeran Red Cross and the Junior Chamber International Nigeria to operate as a "smart blood bank" through a mobile app that serves as a single access point to connect health facilities to suppliers and manufacturers of essential medical supplies such as blood, drugs, oxygen, medical devices and consumables. The platform simplifies procurement processes lowering wait times and costs. This initiative is a good example of how the use of AI, the internet of things, and digital technologies are helping to solve persistent issues regarding access to healthcare in low- and middle-income countries. Lend and Arm also conducts awareness campaigns to promote voluntary blood donation and contributes timely and safe blood supply for patients in need by using drones to deliver it in a short period of time.

Lend an Arm is one of the three finalists in the 2022 Africa Digital Innovation Competition organized by the U.S. Chamber of Commerce's U.S.-Africa Business Center. The winner will be announced in December 2022. The competition is an example of how industry organizations can support innovation and the expansion of good practices from one country to another. Healthcare companies can participate in such initiatives and promote a more efficient use of their products by partnering with local innovators. To do so adequately, it is key to count on a good understanding of the local challenges, opportunities and stakeholders.

CLIMATE CHANGE & HEALTHCARE

More people than ever before are exposed to increased climate-related health risks such as poor air and water quality, infectious diseases, and heat stress. According to the WHO climate change is currently the single biggest health threat to human health. It is estimated that every year, environmental factors take the lives of approximately 13 million people. In response to the growing need for information on the link between climate and health, the WHO and the World Meteorological Organization (WMO) recently launched ClimaHealth, the first global knowledge platform dedicated to gather data on these issues to contribute to creation of evidence-based policy. The generation of data on the impact of climate change on human health will become an increasingly powerful tool for public health to prevent and reduce the impact of non-communicable and infectious diseases at a global scale.

While the COVID-19 pandemic the increased awareness for climate action, according to the Lancet's 2022 Global Report of the Lancet Countdown, 242 (30%) of 798 cities reduced the resources allocated for climate change, while only 178 (22%) reported an increase in financing. The rising awareness on climate change is a trend likely to continue evolving during 2023 and it represents an array of opportunities for the private sector to invest in.

Many of the world's leading healthcare companies have joined forces to create the Sustainable Healthcare Coalition to address some of the most pressing sustainability issues in global healthcare. While improving people's health, healthcare can also contribute to environmental and social issues such as consuming scarce resources, generating unnecessary waste, contributing to poor social standards in supply chains, or releasing hazardous substances. One of the main challenges for healthcare systems in a post-pandemic environment will be tackling the environmental challenges while facing an increasing demand for health services.

The collaboration between public and private stakeholders will be key in 2023 to make the delivery of healthcare services and goods more efficient and sustainable. Healthcare companies have committed to reducing their carbon emissions and the environmental impact of their portfolios, making water usage more efficient, implementing sustainable procurement strategies, prioritizing waste mitigation opportunities, and using their capabilities to address unmet health needs for climate-vulnerable populations. Now more than ever it is necessary to understand the impact of our activities and partner with policy decision makers to implement evidence-based measures that can protect those that are enduring the consequences of climate change and

THE NEED FOR INNOVATIVE AND INTEGRATED HEALTHCARE SOLUTIONS

According to estimates from the WHO by 2030 there will be a shortage of approximately 18 million health professionals worldwide. This shortage combined with increasing healthcare costs and growing populations across the world, call for a significant shift in how we deliver healthcare. This will be a shift from in-person to digital, from services to solutions and from treatment to prevention. Integrated care for NCDs will need to leverage available digital solutions and focus on preventing patients from needing costly treatments and procedures down the road, while cancer care will need to integrate primary and specialized healthcare systems and invest in value-based financing mechanisms amid limited fiscal space.

The demand for digital health solutions will emerge from the new patient-centric, individualized, and preventive care approaches that are driving the evolution of healthcare systems. One of the main drivers behind integrated care will be the digitalization of healthcare delivery, particularly the integration of medical records and increased access to primary care. In emerging markets where healthcare systems have fragmented coverage and specialists are concentrated in urban centers, telehealth can provide scalable primary healthcare services nationwide and worldwide. However, implementing telehealth in emerging markets faces challenges from technical, organizational, and human perspectives. Governments and healthcare companies will need to invest in digital equity (in terms of technology access and e-health literacy) to maximize the benefits of telehealth services to the populations in underserved areas.

Investment in data literacy among healthcare providers and the robustness of health data will also be needed so emerging markets can implement innovative contracting mechanisms and value-based healthcare. Increasingly, healthcare companies are offering payers risk-sharing mechanisms based on financial or health outcomes that can help healthcare systems with limited resources focus their budgets on innovative yet effective interventions. However, to implement these mechanisms, healthcare providers need to invest in data management systems and know-how to effectively measure improvements in health outcomes. Furthermore, outdated procurement provisions will need to be streamlined and modified to allow for performance-based contracting.

Increasingly, healthcare companies will shift from having a product-buyer relationship with payers to one of service delivery, with integrated management of NCDs presenting a significant opportunity for public-private collaboration. Local capacity building, strengthening of relationship with local health ecosystem and early engagement with payers and regulators will be essential for healthcare companies operating in emerging markets. There is also a need to expand relationship further to other sector to identify potential ways of collaborating, specially to advance in digitalization & technology, as well as to making healthcare processes more sustainable and committed to climate change challenges ahead of us. Speyside's offering of integrated policy and corporate affairs advisory can help leading companies maximize their market entry and growth potential. The availability of expert consultants on the ground also makes Speyside an ideal partner to design and implement market access strategies that prepare the landscape for sustainable business results. Please visit our website for more information.

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