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Predicting the future
of Healthcare and
Life Sciences 2025
An African perspective





Limited resource allocation towards health in Africa has led to the poorest health outcomes globally. Privately funded segments of the market often track with European and American progress but are still limited by the small market and disparate distribution across the continent. For the majority of Africa to fully access equitable health, innovative and efficient solutions are required to address challenges that other markets do not share.

Increased digitisation and adoption of such technology affords the continent the opportunity to leapfrog certain infrastructure investments on the road to achieving better health outcomes.

Digital procurement and localisation to improve access



Significant global supply chain disruptions that were experienced as a result of the COVID-19 pandemic have highlighted the risks associated with such a significant dependence on imports. Disruptions were seen across numerous value chains, with the medical supply chain disruptions having a direct impact on patients' abilities to access appropriate care across the world with long-term effects that are yet to be fully understood. Such impacts are compounded in low resource settings due to the limited options and alternatives available.

The African Union responded with the development of the Africa Medical Supplies Platform. The digital pooled procurement mechanism enables governments access to COVID-19 related critical and essential medical supplies. The technological enablement and pooled nature of the aggregated supply and demand aims to increase affordability and access to countries that would otherwise not be in a position to appropriately respond.

Local medicines and medical supplies manufacturing may be accelerated due to the increased interest by African countries in local manufacturing. Significant progress would be dependent on the successful implementation of the African Continental Free Trade Area vision to create one African market. One example is the signing of a Memorandum of Agreement (MOA) by Ghana National Chamber of Pharmacy for construction of a pharmaceutical industrial park to include pharmaceutical production plants, bioequivalence/lab testing services and the establishment of an Active Pharmaceutical Ingredient (API) plant. This initiative creates the opportunity for local employment and sustainable access to treatments. Whether local manufacturing will reduce actual cost to patient depends on the type and complexity of the medical product being manufactured.

Diagnostic and treatment innovation to improve health outcomes



Disease burdens are challenging and changing with an increase in ageing populations and rapid urbanisation seeing an increase in non-communicable diseases. Non-communicable diseases are projected to exceed deaths due to communicable, maternal, perinatal and nutritional diseases combined by 2030 ⁽¹⁾ requiring a reallocation of funding to address current gaps driven by the current status quo.

The low numbers of skilled health professionals impact the ability to timeously diagnose and treat, especially in a landscape of changing disease burdens. Less stringent data protection laws in Africa support the advancement of AI research to support better health outcomes in patients, however data remains limited. As a result of COVID-19,

an increased investment in information systems and integrated disease surveillance systems provides better datasets, this coupled with the increased investment in sciences across the continent supports continued innovation in this area which has already shown promising solutions with cancer diagnosis.

Robotic pharmacies significantly shorten patient waiting time and address the challenges associated with the shortage in healthcare workers. Pick-up-and-go lockers have proven successful as it increases physical accessibility, particularly in rural areas. If data is collected throughout the supply chain, full end-to-end data can successfully be used to help address stock shortages at facilities as well as patient adherence.

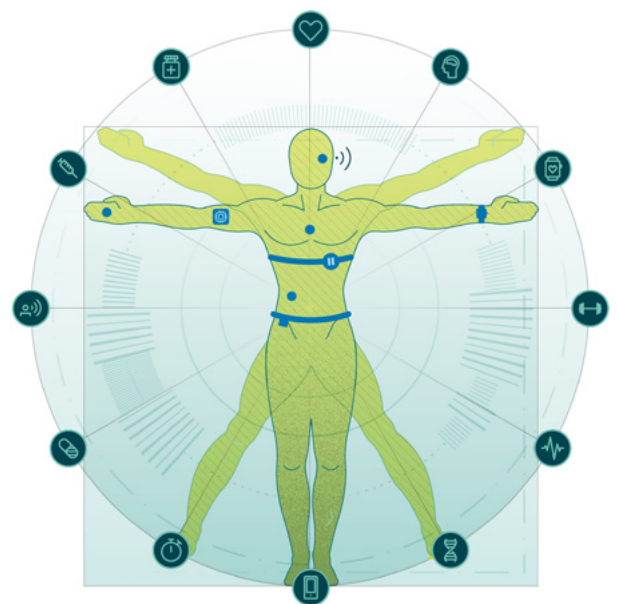
IoMT to improve health outcomes with less resource requirements



The drive by the telecommunications industry in Africa means greater access to information and healthcare. It is estimated that one third of people in Sub-Saharan Africa had access to a smartphone in 2018, double that from 2014 and that number is expected to double again by 2025⁽²⁾. This access to a smartphone means that the people can be reached and have their primary healthcare literally in their hands. Following on from the introduction of smartphone technology, people appreciate being able to engage with a physician on their mobile device because in most instances the nearest face-to-face visit would be a prohibitive distance away.

With the increase in telecommunications infrastructure and the ability to purchase a basic smartphone at cheaper and cheaper prices the use of the Internet of Medical Things (IoMT) to achieve significantly improved patient outcomes with a reduced number of resources is now a possibility. The use of IoMT decreases costs, and improves diagnosis and treatment which otherwise would be impossible given the skills shortage. In addition to this it improves disease and treatment management and allows for remote monitoring of chronic diseases which are on the increase.

Securing supply chains may require increased investment especially since the pandemic has given rise to opportunities for substandard and falsified medicines. The magnitude of investment required and the ability to make such an investment differs by country which may further increase health inequalities. Access to a smartphone represents an avenue for a patient to research and find out where to procure reliable medicines, as well as utilise barcodes to ensure the authenticity of a product.



Increased public and private partnerships to drive progress



Public private partnerships (PPP) provide the various countries with much needed funds in order to progress in healthcare. The benefits of PPPs are plentiful, especially when it comes to powering growth within Sub-Saharan Africa. They trigger investment in human development and help secure basic utility services, and are also a valuable tool in solving Africa's vast infrastructure deficits. Constraints may be present which include inadequate legal and regulatory frameworks, lack of technical skills to manage programs and projects, unfavourable investor perception of country risk, Africa's limited role in global trade and investment, small market size, limited infrastructure, and limited financial markets. PPPs in

health are on the rise in Africa as governments recognise the important role which the private sector can play in increasing access to healthcare for the African population. Previously, PPPs were mostly focused on infrastructure, but this is evolving and the vision is to have PPPs where the private sector could build a hospital as well as provide equipment services to government patients in that hospital for which government would pay a fee. African leaders want to improve health, and this means partnering with the private sector. Everything in healthcare is impacted by the private sector, one example being that majority of medicines are always manufactured in the private sector.



Endnotes:

1. World Health Organisation Africa, "Noncommunicable diseases", accessed 11 January 2021
2. World Economic Forum, "Here's how Africans are using tech to combat the coronavirus pandemic", accessed 11 January 2021

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