

# East Africa Healthcare Innovation Landscape Primer

Full report to be released in March 2016!

**Background:** Healthcare innovators are central in driving sector progress but face critical challenges to growth such as product and service development, design, and iteration, access to financing, strategic planning, performance management, organizational leadership and talent, and structuring mutually beneficial partnerships across the ecosystem. Overcoming these challenges is easier for innovator organizations when knowledge, talent, and ideas are shared across a larger ecosystem of players interested in seeing good ideas succeed.

**Driving Research Question:** What needs to happen in East Africa for healthcare innovations to positively impact the sector?

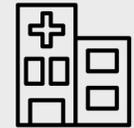
We launched the East Africa Healthcare Innovation Landscape Project to understand the healthcare innovation ecosystem in East Africa – its players, gaps, and opportunities – so that key stakeholders can interact more effectively and grow healthcare innovations that are poised to disrupt the sector for positive social impact.

We spent 2015 gathering information and talking to more than 60 stakeholders in the healthcare innovation ecosystem including public and private sector players, investors, grant makers and donors, academic institutions, network and support organizations in the health and social enterprise space, and technology sector players.

## Emerging Trends in Healthcare Innovation



1) Innovators from our 2015 pipeline sourcing initiatives tended to be earlier stage, for-profit companies concentrating on technology solutions



2) Care providers are aggregating into networks and using improved tools, processes, and technologies to create economies of scale and improve quality



3) Aggregated networks of care providers are using their influence to create system-wide change

### Data Sources:

- 9 months of research in 2015
- Interviews with 60 stakeholders across multiple sectors
- Data from our 2015 healthcare innovator pipeline sourcing initiatives

## Healthcare Market Opportunities

**Over 50% of East Africans lack any form of health insurance**

**One out of three premature deaths in East Africa is caused by NCDs**



**Embedding solutions into patients' daily lives holds promise for improving health outcomes**

There is growing market demand but limited successful innovations currently seen in these areas:



**Financing solutions:** Just shy of 90% of Kenyans lack any form of health insurance and the picture is similar in Uganda. However, a health financing product for the mass market has yet to scale in the region and demand among private sector patients and providers for such a product continues to increase.

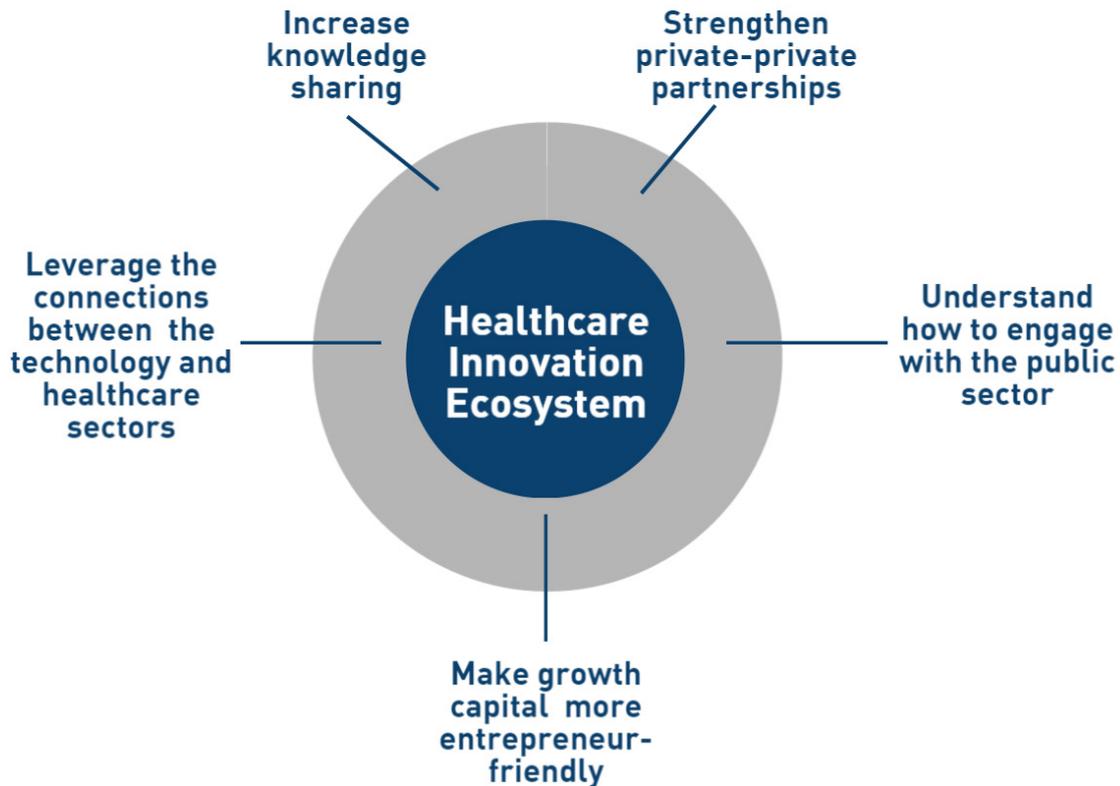


**Non-communicable disease (NCD) management models:** East Africa countries continue to face the double burden of communicable and non-communicable diseases with **non-communicable diseases now accounting for nearly one-third of all premature deaths**. However, innovation in this area remains sparse even as demand continues to grow at an increasing rate.



**Patient-centered solutions:** Existing healthcare innovations are offering provider-led solutions like training, improved payment models, or process improvements. **Patient-centered solutions like patient engagement, education, and embedding solutions into the daily life or community of patients are not yet as prominent in the region**, but hold promise for improving health outcomes through better interactions between the patient and the health system.

# Supporting the Healthcare Innovation Ecosystem



- **Strengthening private-private partnerships:** Structuring mutually beneficial partnerships between healthcare innovators and multi-national corporations and other prominent private sector players across the healthcare value chain can help innovators grow and ensure that the best innovations are being leveraged by those well positioned to reach a large portion of the population.
- **Understanding how to engage with the public sector:** Understanding how to structure high value public-private partnerships can open up a path to scale for small-scale healthcare innovators and multi-national corporations while making progress towards public sector goals.
- **Making growth capital more entrepreneur-friendly:** Deploying early and mid-stage growth capital (both grants and investments) in a way that allows innovators to learn, iterate, and scale successfully can create more impactful enterprises in the long term.
- **Leveraging the connections between the technology and healthcare sectors:** Improving the connections and understanding between the healthcare and technology sectors could lead to faster growth and more efficient scaling of healthcare innovations across the region.
- **Increasing knowledge sharing:** Sharing what market intelligence and assumptions inform the design of healthcare innovations, how companies have tested these healthcare innovations, and what they found to work and not work can prevent duplication, funnel resources to the right innovations, and accelerate the growth of the best ideas.

## About Innovations in Healthcare

[Innovations in Healthcare](#) is a leading global network supporting the scaling and adaptation of promising healthcare innovations worldwide. We aim to improve healthcare and advance health by sourcing, strengthening, scaling, and studying the best healthcare innovations globally. We were co-founded by the World Economic Forum, McKinsey & Company, and Duke University in 2011, and operate as a nonprofit organization hosted by Duke in North Carolina, USA. Over five years, we have developed a network of 67 leading healthcare innovators working in 47 countries and serving over ten million people.

Innovations in Healthcare and the [Center for the Advancement of Social Entrepreneurship](#) are lead partners in the [Social Entrepreneurship Accelerator at Duke](#) (SEAD). SEAD brings together interdisciplinary partners through a coordinated effort across Duke University and leverages institutional relationships and networks to create an integrated global health social entrepreneurship hub for diverse stakeholders across the globe. SEAD is funded by the United States Agency for International Development (USAID) under cooperative agreement number AID-OAA-A-13-00004.

## Opportunities to Engage

Innovations in Healthcare is focused on addressing ecosystem barriers and fostering innovation in areas that need it most. Globally, we work with governments, funders, and corporates to:

- **Find and grow great partners** including innovators to invest in, develop with, distribute through, or just be inspired by. We also offer customized capacity building support to address growth needs.
- **Create new ideas** by finding new business and operating models and giving advice on accessing new consumer segments, as well as structuring opportunities for private sector corporations to learn from innovators.
- **Build philanthropy or investment portfolios** by identifying desired impact, finding the right innovators to fund, and measuring portfolio impact.
- **Immerse partners in new markets** by meeting innovator CEOs and Founders, understanding growth and healthcare trends on the ground, and understanding how to develop contextually relevant partnerships across various sectors.

**Interested in getting involved and learning with Innovations in Healthcare in East Africa? Contact our East Africa Regional Director, Patricia Odero at [patricia.odero@duke.edu](mailto:patricia.odero@duke.edu).**