

## How innovating emerging markets is set to disrupt the global surgical care industry?

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The growth of emerging markets is poised to transform the delivery of surgical care around the world by 2030, according to a new report. The emphasis will be on affordable technology for early diagnosis; portable modular equipment for minimally invasive and robotic surgery; and smart systems incorporating low-cost sensors and mobile technology to track clinical outcomes and improve team-based surgery.

The report summarises the findings of a workshop held in Boston earlier this year by product design and development firm Cambridge Consultants. It offers unique insight into the future of emerging markets surgical care - as seen through the eyes of industry leaders. And it looks at how these new approaches to healthcare will extend beyond emerging markets to disrupt and transform how affordable quality surgical care is delivered globally.

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"More than 85% of the world's population lives in emerging markets, yet many of these people have no access to affordable quality healthcare, particularly complex treatment like surgery," said Rahul Sathe, head of surgical innovation for emerging markets at Cambridge Consultants.

"Inadequate hospital infrastructure, a scarcity of qualified clinicians and fragmented healthcare ecosystems prevent successful surgical care. The surgical device industry has unprecedented growth opportunity to address the unmet needs of very large patient populations."

The report spells out the huge opportunities for technology disruption in emerging markets. Infrastructure and regulations are

still being formed, and industry legacy is not particularly strong - offering a lower barrier to innovation compared with developed markets.

The primary role of technology will be twofold, says the report. It can extend the 'hospital ecosystem' across the continuum of care from early diagnosis and surgical intervention to postoperative monitoring. It can also ensure products and solutions are robust, usable and affordable - and unlock access to care.

The workshop delegates predict that patient expectations and hospital ecosystems in emerging markets will dramatically evolve and, in some cases, leapfrog developed markets. Even today, some hospitals in India have better outcomes for cardiac surgery than top hospitals in the US or UK. And top-tier hospitals in China are now being designed to be eco-friendly, sensor-rich and cloud-connected.

"Emerging markets will play a significant role in transforming our industry," said workshop delegate Agustin Zabulanes, Latin America marketing manager at Boston Scientific. "Local emerging market companies may provide stiff competition to multinational companies - but they may also prove to be powerful partners in global surgical care. Success will require industry players to evolve the way they do business, organise for innovation and use enabling technology."

The report says 'reverse innovation' offers developed markets the opportunity to benefit from emerging markets by learning new approaches to achieving healthcare affordability and efficiency - with lasting transformation coming from integrating new business models and innovation models. "As organisations evolve and succeed, innovating for emerging markets will enable industry to disrupt and transform how surgical care is delivered globally," said Sathe.