Singapore
Healthcare
Market Overview

BUSINESS IS GREAT
BRITAIN & NORTHERN IRELAND

Introduction to Singapore

Singapore is a highly developed country with a GDP per capita at purchasing power parity more than double that of the UK in 2021.[1] It is a city state with a population of 5.8 million[2], with a centralised government and a reputation for high quality governance.

Singapore is a rapidly ageing society. According to the United Nations a third of Singapore's population will be aged over 65 by 2050, making it the 2nd fastest ageing society in the world.[3] This has been identified as one of the biggest challenges facing Singapore over the coming decades by the government.

Singapore is 2nd in the world for ease of doing business[4] and is open to foreign companies and government organisations operating in their healthcare industry. This means there are opportunities for British companies and NHS organisations in a wide range of areas, but that there is also intense global competition in this market. Singapore also provides a safe base for UK companies to expand to wider Asia-Pacific markets.
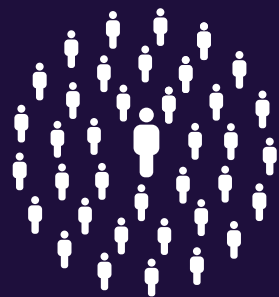
GDP (PPP)[5]:

$551.6 billion (2020 estimate)

Population:

5.8 million (2021)

Health Spending as percentage of GDP[6]:

4.46% (2018)

Life Expectancy[7]:

83 (2018)

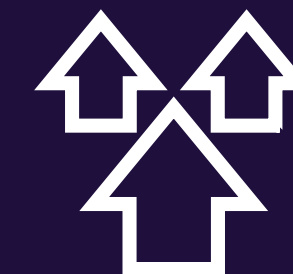**Ease of doing business[8]:**

2nd (2020)

Top three advantages:

- Government and private sector committed to bringing cutting edge technologies to the country
- Stable business environment
- Global business hub and gateway to wider Asia Pacific region

Singapore Healthcare System

Singapore has some of the best health outcomes in the world, with a higher life expectancy and lower infant mortality[9] than the UK. Singapore has numbers of hospital beds[10], doctors[11] and nurses[12] per 100,000 people comparable to the UK and other developed countries. Singapore's government healthcare expenditure is set to increase by 160% by 2029.[13]

Healthcare in Singapore is provided by both the public and private sectors. The Ministry of Health provides vertically integrated healthcare services in the eastern, central and western regions of Singapore through this system. Hospitals can, and do, charge different prices for the same treatment though not all hospitals offer all treatments. The Ministry of Health maintains a cost comparison website and has also set benchmarks to limit variance in cost to ensure healthcare is accessible and affordable across Singapore. To ensure healthcare is affordable and accessible to all, there are a range of subsidies available for all public schemes, services and wards. The current system of means testing will be revised by mid 2022, and will be based on per capita household income.

Hospitals are grouped into three clusters; National University Health System. National Healthcare Group, Singapore Health Services / Sing Health, covering the western, central and eastern regions respectively. These all have their own procurement and commissioning teams responsible for contracting health services and have a high degree of independence under the supervision of the Ministry of Health. Each region contains several hospitals including specialist hospitals and a medical school. Cost setting is done at the hospital level.

The Ministry of Health long term strategy aims to keep healthcare in Singapore both high quality and affordable into the future. It calls it the *"3 Beyonds"*: Beyond healthcare to health; Beyond hospital to community; Beyond quality to value. This ambition mirrors many aspects of what the NHS is striving to achieve in its own NHS *Long Term Plan*.

Overall determination of population needs is made by the Ministry of Health. They plan long term talent and infrastructure development, provide long term plans for big healthcare issues like the ageing population and oversee health regulators. This includes regulating elderly care, medical technology and other healthcare products. The largest healthcare projects and tenders are also handled by the Ministry of Health.

Singaporeans are required to pay a percentage of their income into a savings account called MediSave which is used to pay for routine medical care. Older people and those on higher salaries are required to pay in at a higher percentage of their income. Payment is taken out of MediSave accounts when patients receive routine medical care. However, they rarely pay the full cost of their healthcare. For example, government approved drugs, stays on the lowest category wards, long term care for the elderly and many other treatments are all heavily subsidised by the central government.
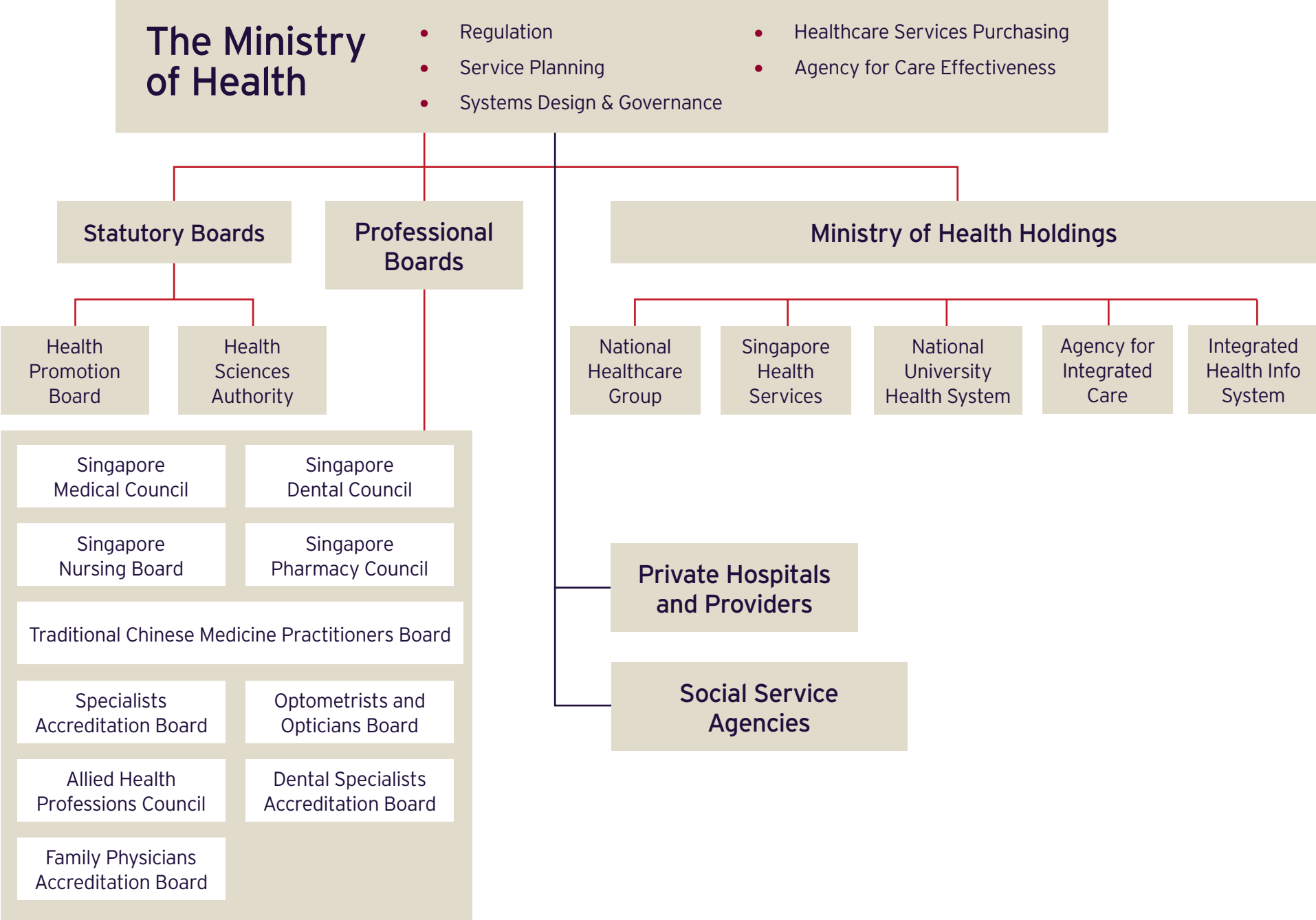
For non-routine care there is an insurance scheme called MediShield Life, compulsory for all Singapore residents. Premiums are higher for those with pre-existing conditions and older people. There are subsidies for less well-off citizens by the central government. 68% of Singaporeans and permanent residents opt for an 'Integrated Shield Plan', combining legally required public health insurance with private health insurance, to cover non-subsidised healthcare treatments and other costs that are normally paid by Medisave.[14]

Finally, there is Medifund which is a large endowment maintained by the Singaporean Government. The interest from that endowment is allocated to hospitals. Hospitals can use these funds at their discretion to treat patients unable to afford their treatments through Medisave or MediShield Life programmes.[15]

Organisation of the Health System in Singapore

The Ministry of Health	
• Regulation	• Healthcare Services Purchasing
• Service Planning	• Agency for Care Effectiveness
• Systems Design & Governance	

Statutory Boards

Professional Boards

Ministry of Health Holdings

Statutory Boards:
- Health Promotion Board
- Health Sciences Authority

Ministry of Health Holdings:
- National Healthcare Group
- Singapore Health Services
- National University Health System
- Agency for Integrated Care
- Integrated Health Info System

Professional Boards:
- Singapore Medical Council
- Singapore Dental Council
- Singapore Nursing Board
- Singapore Pharmacy Council
- Traditional Chinese Medicine Practitioners Board
- Specialists Accreditation Board
- Optometrists and Opticians Board
- Allied Health Professions Council
- Dental Specialists Accreditation Board
- Family Physicians Accreditation Board

Private Hospitals and Providers

Social Service Agencies

Digital Health

Telehealth is already an established part of the healthcare landscape in Singapore. The government launched a video consultation app in 2017 that allows Singaporeans to communicate with their doctors.[16] The 2020 Healthcare Services Bill has created a regulatory framework for telehealth. The Ministry of Health's Office for Healthcare Transformation has launched a 'future primary care' programme currently trialling telehealth solutions for diabetes and hypertension.[17] This creates opportunities for companies offering innovative products in areas like complex disease management, tele-coaching and tele-rehabilitation.

The Integrated Healthcare Information Systems (IHiS) has implemented the National Electronic Health Record (NEHR) to achieve 'One Patient, One Record'. However, after several data breaches, cyber security has become a major concern for the Ministry of Health. The government announced, 'The Public Sector Data Security Review' and is currently taking steps to implement their recommendations, potentially creating opportunities for UK firms.

Wearable technology is growing in popularity in Singapore. In response to some citizens having difficulty accessing the 'TraceTogether' Covid App, the government introduced a token that citizens could wear around their necks allowing them to enter supermarkets and other buildings. This has increased awareness of wearable health tech among demographics that previously did not use it, potentially leading to greater opportunities.

The Smart Nation initiative aims to use digital technology to transform Singapore and it has health[18] as a major component. The focus areas likely to be of interest to UK companies are Telehealth, Assistive Technology & Robotics and Health Promotion. Another example of the government's commitment to digital health is the design of the Woodlands Health Campus which has been designated as a Smart Hospital.[19] Wards of the Future are being trialled at the hospital to develop and pilot smart solutions.

There are also opportunities for MedTech with a large market in Singapore for innovative devices and products due to increased government spending and the opportunity of using the Singapore market as a base for the wider South East Asia region.

Elderly Care

Singapore has a rapidly ageing population, expected to be the 2nd country with the largest projected percentage point increase in the share of older persons by 2050.

In response to this the government has launched an Action Plan for Healthy Ageing.[20] While Singaporeans currently have the 2nd highest health adjusted life expectancy in the world[21] the government is keen to ensure that, as the older population grows, they are able to maintain and enhance the high quality of life that older people enjoy in Singapore today.

The key is ensuring their health system has the latest innovations assisting healthy ageing. The Agency for Integrated Care supports grants of up to $300,000 SGD (around £162,000[22]) through their Healthcare Productivity Fund[23] to encourage Singaporean care providers to adopt the latest technology.

Recently the government concluded a 'Healthcare Challenge' offering Singapore as a testbed for solutions to problems affecting elderly people, including the prediction of falls and preventing accidental abscondment from care homes by people with dementia.[24]

The following areas are of particular interest to healthcare providers in Singapore:

- Tools for preventing and managing chronic conditions
- Patient safety: prediction and prevention of falls, wounds, bed sores and infections
- Dementia care including training programs for dementia care staff
- Robotics, sensors and remote monitoring
- Technologies and solutions to improve nurse and labour productivity
- Rehabilitation technology
- Community care nursing training

Along with healthy ageing, there are also other rising non-communicable disease areas that Singapore will need to find solutions for, including mental health, diabetes, cardiovascular and stroke.

Education and Training

Singapore has world leading system for medical training and engages in collaboration with overseas partners to maintain its status.

For example, Lee Kong Chian school of Medicine is a joint venture between Nanyang Technological University, Singapore and Imperial College, London[25] and offers joint PhDs with the University of Exeter.[26] King's College, London[27], the University of Dundee[28] and the University of Glasgow[29] all offer undergraduate degrees in nursing tailored to qualified nurses in Singapore. There are opportunities for NHS organisations and others who provide nursing education to offer more specialised training for nurses working in community health, speciality care and as clinicians.

As well as general medical training opportunities, there are opportunities for those with more niche education offers to succeed in Singapore. With the ageing population mentioned earlier, education and training relating to older people and dementia care are also in high demand.

More niche areas of education could also provide opportunities for UK companies such as medical simulation, serious games for healthcare professionals & patients and genomic counselling.

Regulation for Medical Devices and Pharmaceutical Products

Singapore requires companies who are importing, supplying or manufacturing medical products to have a dealer's license. Having a local partner import your products is usually the best solution.

For new products, reports will be required on the safety and efficacy of the product. For Medical Devices, these reports are similar to those required by the UK's MHRA (Medical and Health Regulation Authority). Along with most western countries, Japan, South Korea and China, Singapore is a member of the International Medical Device Regulators Forum which aims to harmonise medical device regulation globally. Singapore also follows international best practice in their regulation of pharmaceutical products. The **Health Sciences Authority** is the regulator for Singapore and clearly lays out the processes on their website.

Trade Deal

The UK- Singapore free trade agreement came into force on the 1ˢᵗ January 2021. This agreement means that UK exporters continue to have the same level of access to the Singaporean market that they had prior to the UK leaving the European Union.

The agreement achieves several benefits including preferential tariffs between the UK and Singapore and continuity of provisions on intellectual property. It guarantees that Singaporean procedures, rules, criteria and implementing guidelines will be fair, transparent, and reasonable, and not discriminate against UK companies.

Singapore is the UK's 19th biggest trading partner, accounting for 1.3% of UK trade.[30] In the four quarters to the end of Q3 2020, total UK exports to Singapore amounted to £9.3 billion.[31]

Tips for Exporters

Singapore is a multilingual country with English as an official language. English is the primary language of Singapore's education system and business therefore fluent English is almost universal. The UK and Singapore also have strong historical ties. Both economies have similar business and legal practices and share similar technical standards.

Singapore has been a global hub for business for decades and is an easier place to do business in comparison with many neighbouring markets. A new business can be set up with a matter of hours and can provide an entry into and regional base for the Asia Pacific region.

Factors such as distance from the UK and lack of experience in the market means many exporters appoint an agent or distributor. They may be able to act across neighbouring markets in South East Asia, based on their established networks in the various markets.

How DIT can help

DIT helps businesses export and grow in global markets.

We also help overseas companies locate and grow in the UK and internationally. Our services are provided in over 100 markets throughout the world.

DIT in Singapore can support your export activity in several ways:

- Market intelligence and introductions
- Relationship building
- Trade missions
- Participation in external events
- Addressing export barriers

Contacts & Useful Links

The British Chamber of Commerce in Singapore has been supporting businesses in the country since 1954 **https://www.britcham.org.sg**

UK-ASEAN Business Council - UKABC - helps British businesses export to Southeast Asia through networking events and export opportunities **www.ukabc.org.uk**

The Ministry of Health (MOH) is responsible for all health policy in Singapore. Long term planning and the largest procurements are carried out by the ministry **www.moh.gov.sg**

Ministry of Health Holdings is the holding company for Singapore's public sector healthcare infrastructure. They develop and build new healthcare infrastructure, provide the recruitment system for healthcare professionals and are developing a national health IT infrastructure **www.mohh.com.sg**

The MOH Office for Healthcare Transformation promotes innovation and trials of new systems within the Singapore healthcare system **www.moht.gov.sg**

The Integrated Healthcare Information Systems is the technology agency for the public sector health industry. They digitise, analyse and connect the Singapore healthcare system **www.ihis.com.sg**

Agency for Integrated Care aims to provide high quality elderly care by providing health information to older people, working with care providers to strengthen their capability to deliver quality care **www.aic.com.sg**

The Health Sciences Agency is the regulator for all medical products including devices and pharmaceuticals in Singapore **www.hsa.gov.sg**

Health Promotion Board is the organisation responsible for public health information campaigns in Singapore- with healthy eating, exercise, mental health in the workplace and anti-smoking campaigns among others **www.hpb.gov.sg**

The most likely point of entry for many UK organisations into the Singapore healthcare system will be through one of the three state owned regional hospital clusters:

Singapore Health Services (East) **www.singhealth.com.sg**

National Healthcare Group (Central) **www.nhg.com.sg**

National University Health System (West) **www.nuhs.edu.sg**

Major hospitals and hospital groups out of the state owned sector may also prove to be useful partners including:

Parkway Pantai- **www.parkwaypantai.com**

Raffles Medical Group **www.rafflesmedical.com**

Thomson Medical **www.thomsonmedical.com**

Mount Alvernia **https://mtalvernia.sg**

For further information contact **lifescience@trade.gov.uk**

Resources

1. https://www.imf.org/external/datamapper/PPPPC@WEO/MNE/MKD/SRB/ALB/BIH/UVK/GEO/UKR/ARM/MDA Singapore $101,410 UK $47,690

2. https://www.imf.org/en/Countries/SGP

3. https://www.un.org/en/sections/issues-depth/ageing/ World Population Ageing Report pg 9

4. https://www.doingbusiness.org/en/rankings

5. https://www.imf.org/en/Publications/WEO/weo-database/2020/October/weo-report?c=576,&s=NGDPD,PPPGDP,&sy=2018&ey=2025&ssm=0&scsm=1&scc=0&ssd=1&ssc=0&sic=0&sort=country&ds=.&br=1

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7. https://data.worldbank.org/indicator/SP.DYN.LE00.IN 2018 figure

8. https://data.worldbank.org/indicator/IC.BUS.EASE.XQ 2019

9. https://data.worldbank.org/indicator/SP.DYN.IMRT.IN 2019

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11. https://data.worldbank.org/indicator/SH.MED.PHYS.ZS

12. https://data.worldbank.org/indicator/SH.MED.NUMW.P3

13. https://www.fitchsolutions.com/corporates/healthcare-pharma/singapore-2020-budget-offers-further-support-senior-population-21-02-2020

14. https://www.commonwealthfund.org/international-health-policy-center/countries/singapore#:~:text=The%20most%20common%20coverage%20is,had%20one%20of%20these%20plans.

15. More information and the chart below can be found at https://www.commonwealthfund.org/international-health-policy-center/countries/singapore

16. https://www.ihis.com.sg/vc

17. https://www.moht.com.sg/future-primary-care

18. https://www.smartnation.gov.sg/what-is-smart-nation/initiatives/Health

19. https://www.whc.sg/

20. https://www.moh.gov.sg/docs/librariesprovider3/action-plan/action-plan.pdf

21. 74. Behind Japan. https://apps.who.int/gho/data/node.main.HALE?lang=en

22. Exchange rate $1=£0.54 correct as of 15/02/2021

23. https://partners.aic.sg/funding-support/hpftechadoption

24. https://www.healthcarechallenge.sg/

25. http://www.lkcmedicine.ntu.edu.sg/Pages/Home.aspx

26. http://www.lkcmedicine.ntu.edu.sg/Programmes/NTU-Exeter-PhD-Programme/Pages/home.aspx

27. https://www.kcl.ac.uk/study/postgraduate/taught-courses/nursing-for-qualified-nurses-in-singapore

28. https://www.dundee.ac.uk/postgraduate/nursing-health-singapore

29. https://www.gla.ac.uk/undergraduate/degrees/nursingsit/

30. https://www.gov.uk/government/statistics/trade-and-investment-factsheets-partner-names-beginning-with-s Singapore, pg 1 Accessed Febuary 12th 2021

31. https://www.gov.uk/government/statistics/trade-and-investment-factsheets-partner-names-beginning-with-s Singapore, pg 3 Accessed Febuary 12th 2021

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