Achieving acceptance

Effective strategies for MedTech integration in Southeast Asia

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Challenges in MedTech adoption in Southeast Asia

Medical Technology (MedTech) is helping improve service delivery and addressing growing patient demand in healthcare. In Southeast Asia (SEA), successful workflow automation in hospitals alone could save up to

10 million
man-hours
US$81 million
annually (Figure 1).

Yet, only 49 percent of healthcare organizations in the region have implemented MedTech solutions,[1] despite 65-90 percent of industry leaders recognizing their importance in enhancing patient outcomes, saving healthcare professionals' time and enabling them to perform at their highest skill level.[2]

This shortfall in adoption is a significant missed opportunity to enhance efficiencies.

These inefficiencies are linked to:

staff burnout,
diminished patient interaction time, and
increased risk of clinical errors,

as noted by more than half of healthcare leaders.[3]

Figure 1: Estimated man-hours and costs saved through workflow automation in SEA-6 countries

SG: Singapore, **MY:** Malaysia, **PH:** Philippines
TH: Thailand, **VN:** Vietnam, **ID:** Indonesia

Y-axis: Estimated man-hours saved/year (hours) — 0, 1,000,000, 2,000,000, 3,000,000, 4,000,000, 5,000,000

X-axis: Estimated cost saved/year (millions USD)

Bubbles: SG, 5; MY, 4; PH, 6; TH, 16; VN, 21; ID, 30

Notes: Bubble size represents the annual cost savings for hospitals in millions of US$.

Sources: KPMG analysis using Singapore General Hospital data on man-hours and cost savings,[4] and World Bank data on hospital beds per 1,000 people.[5]

In this report, KPMG has compiled insights from healthcare decision-makers across SEA, identifying

challenges and key drivers

of MedTech acceptance. The discussions also reveal a strong desire to adopt MedTech, particularly to improve clinical outcomes and operational efficiencies. Some motivators include potential financial returns, the opportunity to be seen as technology leaders, and enhanced care quality. However, concerns remain regarding the complexities of implementation and whether organizations are fully prepared to integrate and ultimately, accept, these technologies.

The gap between the eagerness to adopt MedTech solutions and their acceptance stems from a complex array of factors. We identified three key barriers impacting MedTech acceptance in SEA from our discussions with hospital decision-makers:

preference

performance

practice

"
There is always a big gap from early adoption to scaled up solutions. Physicians are excited to use MedTech to support patient treatment, but also unsure how technologies will impact their work.

The Hospital Management Team at Vinmec International Hospital, Hanoi, Vietnam
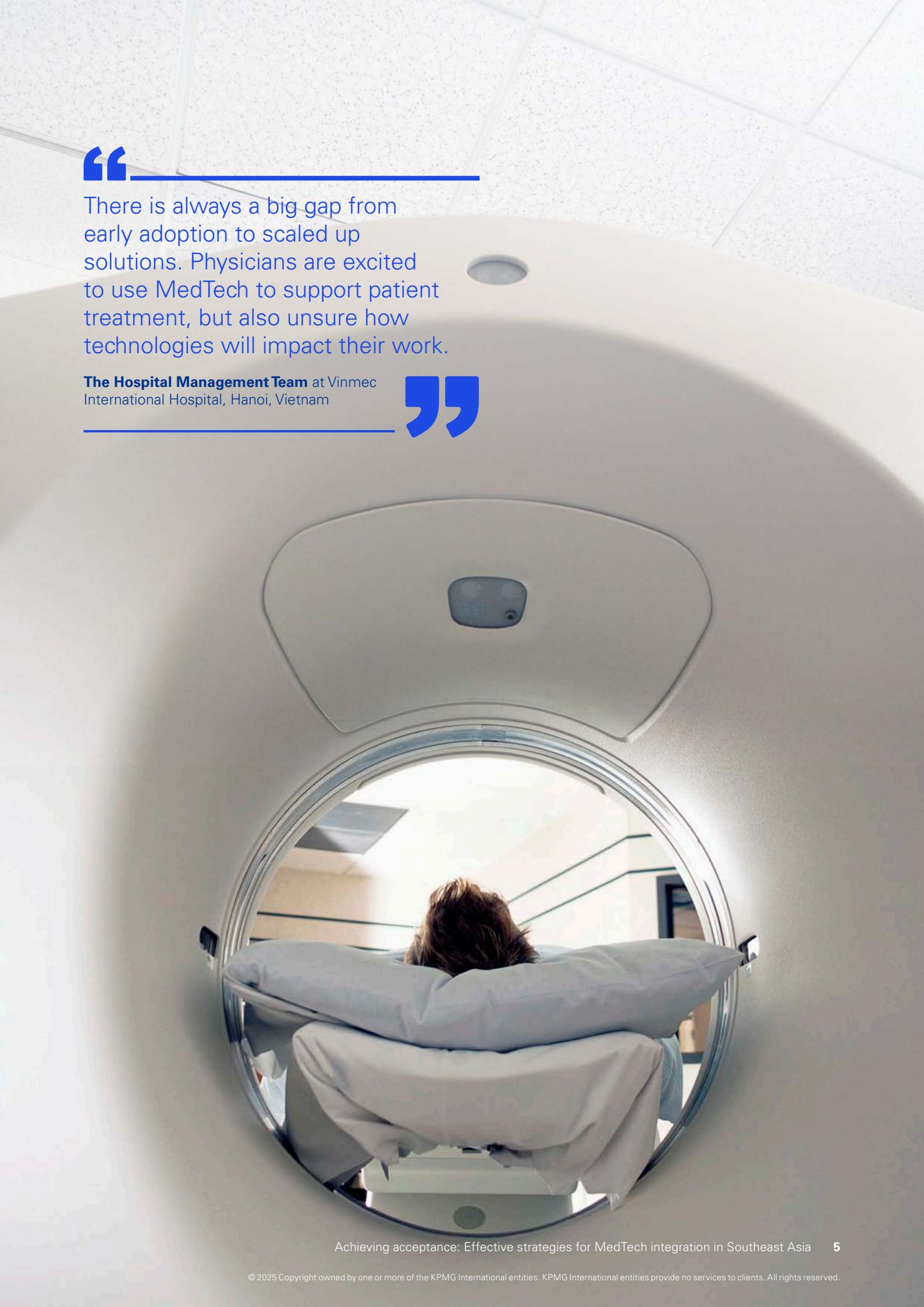
Preference

Perception, beliefs, generational gaps and varying levels of technological comfort influence both patients' and healthcare providers' preferences. A survey of healthcare providers in Singapore found that 45 percent identify resistance from both healthcare professionals and patients as the primary obstacle to adopting new technologies.[6] Therefore, understanding and addressing user preferences is crucial to achieve widespread acceptance of MedTech in healthcare.

> "We need to see who the patients are and what services they are at the hospital for. Baby Boomers still use phone calls to make appointments. Millennials just want it fast. Generation Z wants it online but if they are expecting mothers, they have a preference to be here in-person. Face-to-face feels more personalized to them. Same with physicians, you can't tell them to change what they have been practicing for the past 20+ years.

Leader and practicing clinician, women's and children's hospital in Jakarta, Indonesia

Performance

The acceptance of MedTech solutions is significantly influenced by the level of trust and confidence healthcare professionals have in them. More than 60 percent of healthcare professionals express hesitation in adopting AI systems due to a lack of transparency and fear of data insecurity.[7] Interestingly, a survey has shown that gastroenterologists with fewer than 10 years of clinical experience perceive a higher risk from these AI-powered medical tools than their colleagues with more than 10 years of experience. This could potentially be attributed to more experienced specialists having greater confidence in exercising clinical discretion when new technologies are introduced.[8] This finding stands in contrast to the commonly held view that younger people are more accepting of technology than older. It also underscores the crucial role of building trust in MedTech solutions and confidence in their application to achieve widespread acceptance and successful implementation.

Practice

The introduction of MedTech in the current healthcare practice is complex — integrating with legacy systems and workflows,[9] obtaining stakeholder support,[10] activating multidisciplinary healthcare practices and addressing training gaps.[11] All hospital decision-makers interviewed highlight complications faced when introducing new technologies into established practices. If an organization is not adequately prepared to integrate these innovations, system-wide acceptance of MedTech solutions is ultimately hindered.

> "You need to be very careful when choosing the MedTech to be implemented. You need to consider whether this new innovation will integrate well with what the team has been using. You need to consider whether the selection of one technology over another will be seen as favoritism. You also need to make sure the care team knows how to use it, and if they don't, how to train them.

Leader, private oncology-specialized hospital, Singapore

Ultrasonic surgical aspirator underutilization in Vietnam

Ms. Thi Thu Tram Tran, Director of Revenue Cycle at Hoan My Medical Cycle, shared her experience with the unsuccessful implementation of an ultrasonic surgical aspirator in her previous practice. Despite substantial investment, the state-of-the-art equipment was utilized less than five times in an entire year. Initially, clinicians were eager to integrate the new technology into their procedures. However, a lack of confidence in using the machine, due to limited training and low number of patients opting for the treatment, restricted its use. Consequently, maintenance was neglected as the hospital management focused its resources on other procedures that saw higher traffic. When attempts were made later to employ the device, the machine was no longer operational, further contributing to its underutilization. This experience highlights the importance of comprehensive training, effective integration and ongoing support in ensuring advanced medical technologies are adopted successfully.

Addressing these barriers requires alignment with user needs, during both MedTech development and implementation. A survey of Indonesian healthcare providers showed only 41 percent believe MedTech is tailored to their actual needs even when 79 percent of them are involved in the development.[3] The finding highlights a critical gap between innovation development and day-to-day clinical realities. These gaps in understanding local needs, coupled with limited insights from successful regional implementations, often result in solutions that are misaligned with the unique contexts and workflows of healthcare environments.[12]

Discussions with hospital management teams reveal a strong desire for improved collaboration between technology developers and healthcare providers in this regard. In line with prevailing perspectives in the industry[13], hospital leaders generally agree that taking a user-centered approach could address some barriers to MedTech acceptance. However, they acknowledge that user-centered design may not always be feasible, particularly for technologies developed in other countries, or those that have been established for a period of time already. Instead, they stress the importance of initially selecting MedTech solutions that align with local epidemiological and health system needs, followed by additional efforts to adapt these solutions into local contexts.

Successful MedTech adoption in SEA requires tailored strategies due to diverse healthcare regulations, practices and cultures across the region. Localization has become increasingly important for MedTech companies as part of their market entry strategies.[14] Nevertheless, tailoring products for each market separately is resource-intensive, demanding attention to factors such as research and development, regulatory compliance, distribution, and sales and marketing.

Towards MedTech acceptance in SEA: adapt, advance and activate

MedTech stakeholders in SEA need to make these technologies relevant to local clinical practices by addressing challenges related to preference, performance and practice, while optimizing resource use. Achieving this balance requires collaborative efforts among all stakeholders, notably MedTech companies, hospital management teams and healthcare providers. This article introduces the "Three A's" framework —


Adapt locally

Advance together

Activate regional expertise

to ensure technologies align with local needs and cultural contexts, enabling smoother user acceptance.
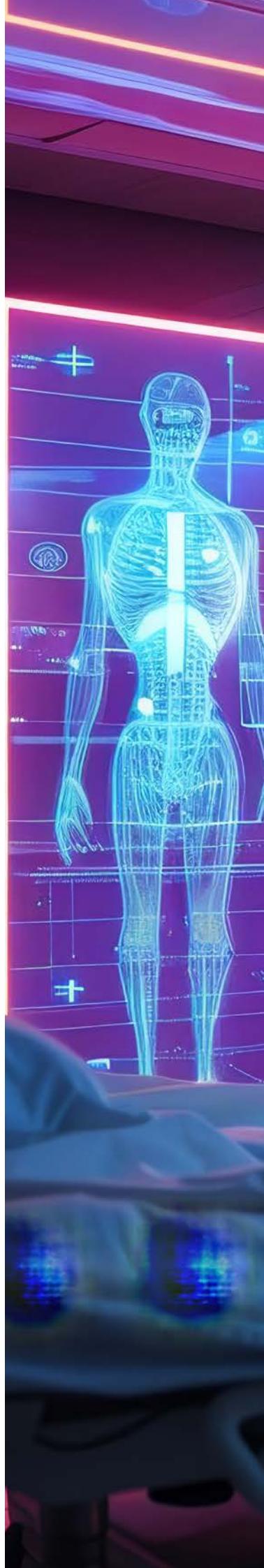
Adapt locally: MedTech localization

MedTech companies should spearhead localization efforts by closely collaborating with hospital management teams and healthcare providers. Across the product development and deployment lifecycle, there are numerous opportunities to balance standardization versus localization, helping improve acceptance and translation.

> "
> From what I have seen, CME works the best when the speaker is a key doctor in our own hospital who has used the technology by himself/ herself, but this person is hard to find for newer technologies. In that case, the speaker should be an expert who knows the technology inside out.

Ms. Thi Thu Tram Tran
Director of Revenue Cycle
Hoan My Medical Cycle
Ho Chi Minh City, Vietnam

Localizing technologies

Four aspects of technology localization were identified from our discussions with hospital decision-makers — workflow, data, usage guidelines and language.

First, new MedTech companies should ensure newly introduced solutions do not conflict with prevailing operations and local cultural norms.[15] For instance, the partnership between Siemens Healthineers, the Global Fund and Qure.ai strategically localizes their AI-driven TB diagnostic technology by aligning it with the existing workflows and cultural context of Indonesia's healthcare system.[16] This initiative provides free AI licenses and training to Indonesian healthcare professionals, enabling seamless integration of diagnostic tools into existing workflows, thereby enhancing local capacity.

The partnership also highlights the importance of building trust with local data for localization. Qure.ai uses local data collected during the pilot to refine AI model accuracy tailored to the Indonesian patient population. Although domestic clinical trials or validations are not always required,[17] integrating global solutions with locally relevant data often enhances providers' confidence in the technology's applicability and effectiveness for their populations and settings. Moreover, local data plays a crucial role in health technology assessments, ensuring that solutions meet regional needs.[18] The availability of locally relevant data supports the development of better-informed clinical guidelines that align with SEA patients' needs.

With the integration of local data, MedTech usage can be adapted to meet regional clinical needs, as patients from different ethnicities have distinct biophysical parameters that impact medical interventions.[19] A hospital leader with a proton therapy facility noted that physicians often need to independently adjust radiation dosages because the recommended levels by a MedTech company are not suitable for SEA patients. This adjustment can be challenging for physicians with limited experience in proton therapy. To better support healthcare providers, developing specific guidelines and parameters tailored to local patient populations and physician demographics can significantly improve the acceptance of these technologies.

Next, given most SEA countries rank low on the English Proficiency Index,[20] translating user interfaces, manuals and standard operating procedures into local languages could boost acceptance. Vinmec Hospital in Vietnam went as far as working with the MedTech provider in translating the SNOMED CT and ICD10 on the user interface into Vietnamese to ensure that healthcare professionals do not misinterpret patients' conditions. By implementing impactful changes that improve technology accessibility for the local community, MedTech innovators can foster greater acceptance in SEA.

Localizing communications

MedTech providers should ensure their technologies capture attention upon market entry and engage the appropriate decision-makers at hospitals for successful adoption.[21] Interestingly, hospital leaders we interviewed offered different views on whether decision-making authority lies with hospital management teams or physicians. However, there was consensus that MedTech providers should be present on the ground to understand the organizational culture and effectively engage with appropriate decision-makers. Additionally, MedTech introduction and training strategies should be culturally aligned with local practices such as through sales representatives or through continuous medical education (CME).

Advance together: user-centered adoption

While MedTech companies should take the lead in localization efforts, the hospital management should take the lead in ensuring acceptance. The true challenge in change management lies in how effectively users embrace and integrate these changes.[22] Here are recommendations on how user-centered adoption could happen.

> **"** We are creating a smart pharmacy in the Rangsit International Hospital. Digital/AI expertise is explicitly indicated in our job posting for the Head of Pharmacy position. We cannot change the system if we do not start from selecting the right person for the job.

Mr. Kamonsak Reungjarearnrungg
Chief Operating Officer
RSU International Hospital
Bangkok, Thailand

Selecting the right personnel

Healthcare organizations looking to integrate MedTech solutions must identify and empower leaders who can drive transformation and champion the adoption of new technologies organization-wide. Looking at the system holistically, management teams need to ensure that all team members share the same mindset and are equipped with the skills necessary for innovation.[23,24] By cultivating a team that is capable of and ready to embrace these technologies, healthcare organizations can better implement and sustain technological advancements.

Vision alignment and communications

Articulating a clear vision and purpose for MedTech adoption, along with effectively communicating its value to stakeholders, was consistently highlighted by hospital decision-makers as a crucial driver for successful integration. A MedTech adoption vision ranges from enhancing patient experience and improving patient outcomes to enabling better access and driving operational efficiencies.[25] Hospitals in SEA, especially private ones, are prioritizing the adoption of new MedTech as they aspire to be technology leaders.[26] Management teams need to ensure this vision resonates throughout the organization.[23]

Furthermore, communication strategies should be adapted to appeal to stakeholders.[12] The rollout of a remote patient monitoring (RPM) program at a Thai hospital, developed in collaboration with a large private company, demonstrated considerable promise during its pilot phase. However, as the program expanded, clinicians expressed resistance, driven by concerns over potential scrutiny of recorded consultations. This necessitated the technology provider to emphasize that the RPM system was designed to enhance patient care, rather than to oversee clinician performance. It was essential for hospital management to clearly convey this message and concentrate on the RPM system's benefits while ensuring that the focus remained positive and non-punitive. By tailoring messages that highlight benefits and address stakeholders' chief concerns, MedTech providers can help users overcome mindset barriers and drive greater acceptance.

Building support and infrastructure

Organization-wide readiness is crucial to reduce resistance to MedTech. Securing comprehensive buy-in from all relevant parties, including allied health professionals, is essential to overcome adoption barriers.[8] Encouraging and rewarding an innovative culture can be achieved by linking adoption initiatives to incentives such as salary increments, performance reviews or regional hospital innovation rankings.[27,13] From the innovators' perspective, establishing support through appropriate frameworks, governance and resources, allows technologies to be piloted and scaled effectively.[28] When end-users feel well-equipped and see the relevance of new technologies to their existing workflows, they are more likely to embrace these innovations.

A notable example of promoting organization-wide readiness for MedTech adoption is the Center for Advanced Skills, Simulation and Training Innovation (CASSTI) at The Medical City (TMC), established in 2014 in the Philippines.[29] CASSTI provides a controlled environment for trainees to practice and perfect their techniques via simulation models before interacting with patients. This facility, utilized by medical trainees, consultants, nurses and veterinary professionals from both local and international institutions, not only fosters acceptance and effective use of advanced technologies but also positions TMC as a leader in medical technology in the Philippines.

Systematic implementation and feedback loop

MedTech acceptance must be supported by continuous feedback loops for effective system-wide integration. Establishing dedicated task forces to define technological aims, coordinate structured training programs, and initiate pilot projects that will evaluate the user readiness and identify potential risks, will ensure smoother implementation of new technologies.[30] Feedback should be provided both internally within the hospital and to technology providers to ensure the technology remains relevant and continues to improve.

For example, TMC has successfully integrated Lunit Insight CXR, an AI solution for chest X-rays that detects abnormal radiologic findings.[31] By coordinating continuous data exchanges between specialists and Lunit, the AI system functions as a "still learning machine". This approach has resulted in improved accuracy and streamlined healthcare operations. Such a model underscores the importance of collaboration and feedback in achieving seamless MedTech integration, ultimately enhancing healthcare efficiency and improving patient outcomes.

Activate regional expertise: learn and leverage

Although every country in SEA is distinct, requiring tailored localization and adoption strategies, stakeholders can still tap into the wealth of knowledge and experiences accumulated in other parts of the region. Here we explore how to "activate regional expertise" to streamline efforts and enhance MedTech acceptance across SEA.

Learning from each other

In the evolving SEA healthcare landscape, collaboration and knowledge-sharing among hospitals within and across countries are pivotal to advancing innovation. Through strategic partnerships and the exchange of expertise, hospitals can tackle shared challenges better, enrich clinical education and incorporate cutting-edge technologies effectively.[32] The partnership between the National Neuroscience Institute in Singapore and Siriraj Hospital in Thailand exemplifies this collaborative spirit to elevate healthcare innovation and education in advanced neurointervention.[33]

This collaboration showcases the vast potential for hospitals in the region to engage effectively in co-learning and innovation. By implementing joint training programs, facilitating the exchange of medical professionals and embarking on collaborative research projects, hospitals are better equipped to meet healthcare needs.

Exploring regional MedTech training centers

MedTech companies have established training hubs in Singapore to support the adoption of new technologies by healthcare professionals. These hubs provide immersive, hands-on training experiences essential for building confidence and proficiency in using sophisticated medical devices and systems. Examples of such centers include Smith+Nephew's Medical Education Centre[34] and Medtronic Customer eXperience Center,[35] both offering cutting-edge simulation environments and interactive learning modules. By exploring these regional training centers, healthcare professionals can stay updated on the latest technological advancements. Exposure and practice in these centers increases confidence, helping professionals to adopt and effectively apply these innovations in clinical practice.

Strengthening regional allied health practice

Allied health professionals are integral to the successful implementation and acceptance of MedTech innovations in the healthcare system, as highlighted in our discussion with hospital leaders. Strengthening the education and training of these professionals is essential to ensure that SEA's allied health workforce is equipped to integrate new technologies into daily clinical practice. Furthermore, establishing regional networks and forums for allied health professionals fosters sharing of knowledge and best practices, accelerating the spread of MedTech innovations. The Malaysian Qualification Agency provides an example of progressive curriculum development, focusing on equipping allied health graduates with the skills to effectively apply artificial intelligence, digitization and the Internet of Things.[36] By empowering allied health workers with necessary skills and tools to embrace technological advancements, SEA can facilitate greater acceptance of MedTech solutions, resulting in better healthcare outcomes.

Conclusion

The **Innovate to integrate** series presents a strategic framework centered around the "Three A's" — achieving *acceptance*, *articulating* value and accessibility in *affordability* — to drive the adoption of MedTech solutions in SEA. This particular release highlights the importance of achieving MedTech acceptance through collaborative efforts between technology developers and healthcare providers during the critical development and implementation phases.

To foster acceptance, stakeholders across the region are encouraged to concentrate on three key actions: *Adapt locally, advance together and activate regional expertise*. These actions address the barriers to MedTech acceptance and, ultimately, enhance adoption in SEA. Stakeholders across the region are urged to take decisive steps to overcome existing barriers and seize the opportunities presented by MedTech innovations.

1. Adapt locally with effective localization strategies:

Stakeholders must localize strategies and communications with the resources available to increase MedTech acceptance. This is essential to facilitate smoother technology adoption and maximize benefits for regional healthcare systems

2. Advance together through user-centered adoption:

All stakeholders are encouraged to embrace user-centered strategies that align technologies with the needs and practices of local health professionals and patients.

3. Activate regional expertise for robust collaboration:

Cross-border collaboration between regional healthcare institutions and MedTech companies promote knowledge sharing. Such exchanges can help stakeholders adapt successful strategies to local challenges, enhancing the effectiveness and reach of MedTech innovations in the region.

KPMG is ready to collaborate with key stakeholders in SEA's healthcare ecosystem to ensure the successful acceptance and integration of MedTech innovations. Leveraging our expertise in localized market entry strategies, innovation translation and adoption, and local stakeholder and partnership management, we offer guidance through the intricate landscape of healthcare technology adoption. Supported by our local teams, we provide a keen focus on the cultural nuances unique to the different countries in the region.

Together, we can create customized solutions, strengthen integration efforts and address specific local needs, cultivating a healthcare ecosystem that is innovative and sustainable.

Let us join forces to advance the vision of a

vibrant, technology-driven healthcare system in SEA.

Innovate to integrate

series explanation

KPMG's series *"Innovate to integrate"* delves into key challenges and drivers that empower MedTech stakeholders to realize three essential goals in SEA:

Achieve acceptance among users.

Ensure effective value articulation of MedTech.

Enhance accessibility, ensuring affordability.

This first installment will focus on the unique barriers for MedTech adoption in SEA. Although this series will be presented in sequence, successful MedTech adoption requires a holistic approach, considering user *acceptance*, value *articulation* and *affordability* simultaneously. By understanding and addressing these interconnected elements, stakeholders can pave the way for meaningful integration of medical technologies across the region.

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