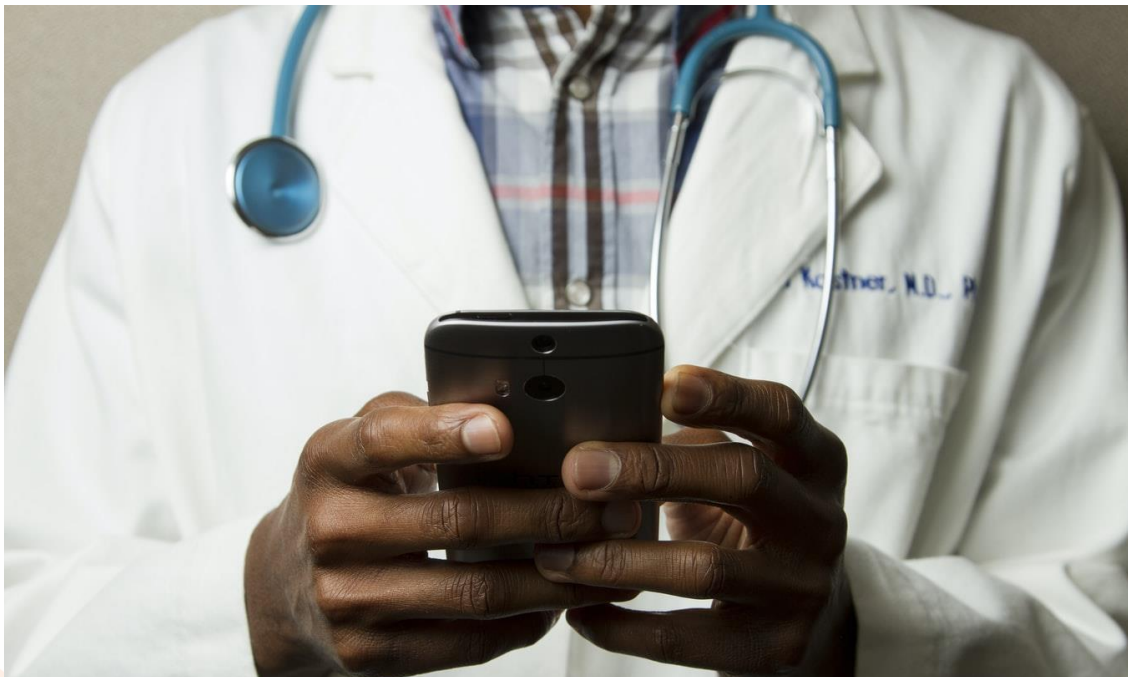




TELEHEALTH IN EMERGING MARKETS: BABYL CLOSES THE GAP IN RWANDAN HEALTHCARE INEQUALITY



This article has been written in collaboration with the GSMA. Country level data on the Rwandan market, as well as information on the Rwandan healthcare system and population dynamics, has been provided by the GSMA through their market case studies and analysis. More information [here](#).

COVID-19 has accelerated demand for telehealth solutions globally. Applications such as phone or video consultations and remote patient monitoring enable basic healthcare services to continue without the risk of virus transmission. In some markets, this has swayed policy changes e.g. in **South Korea** where there has been a temporary easing of telehealth restrictions amid the pandemic.

What does this mean for MNOs?

Changing needs and attitudes present mobile network operators (MNOs) with an opportunity to play a more prominent role in digital health. During the pandemic, MNOs have broadly supported government contact-tracing efforts, but some are taking advantage of the changing climate to refine and expand their telehealth propositions. You can read more about global MNO responses to COVID-19, and their changing strategies, [here](#).

But MNOs must consider factors such as economic development, population size and spread, and even political agendas that play a significant role in shaping regional telehealth solutions and the nuanced requirements that they will need to address.

What are the big challenges for emerging markets, and how can telehealth help?

The ideal for all markets is a healthcare system that is:

1. High-quality
2. Cost-effective
3. Accessible to all

Developing markets face particular challenges with cost and accessibility, and often have large proportions of the population lacking access to physical and even digital infrastructure that is crucial for basic healthcare.

A number of telehealth providers are looking to overcome these barriers and provide solutions that could improve overall healthcare quality amongst typically underserved communities, for example in **Thailand, Indonesia** and **Mexico**.

Case study: Babylon in Rwanda

One particularly interesting example is the partnership between digital health service provider Babylon Health ("Babyl" in Rwanda) and the government of Rwanda, to offer telehealth consultations to their urban *and* rural populations, solving fundamental challenges around inequality to healthcare provisioning.

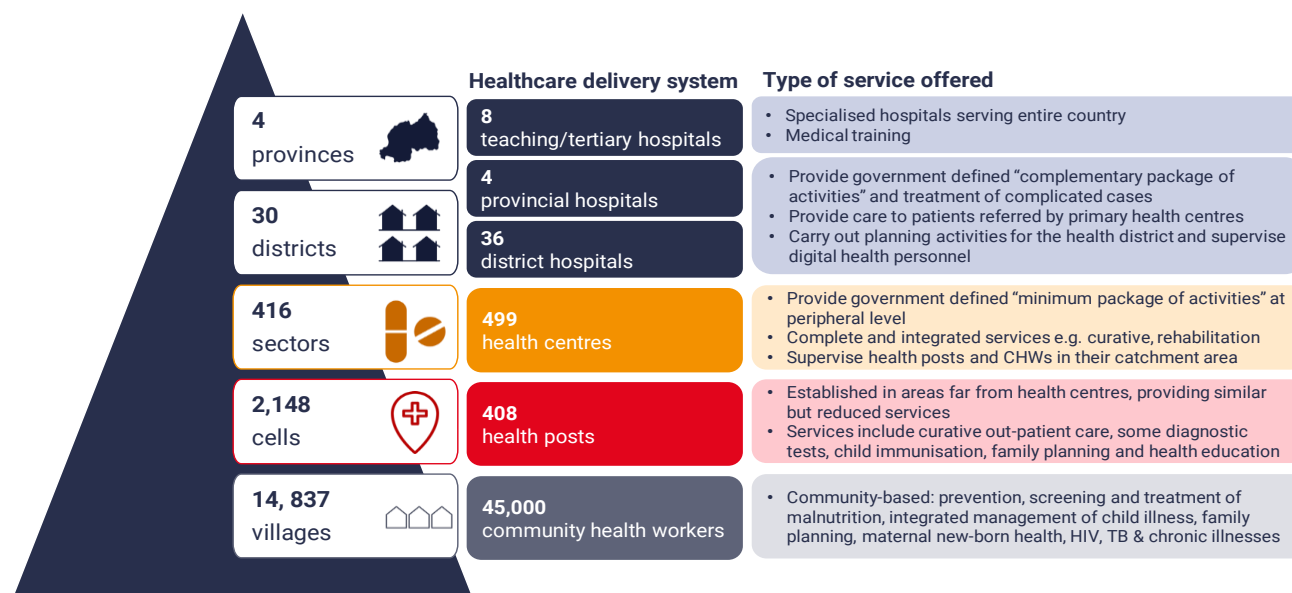
This is part of a broader effort to make the country a global leader in digital health and overcome basic barriers to healthcare access. The Rwandan government leveraged digital health solutions in response to COVID-19, with contact tracing, symptom surveillance, robot-monitoring and data visualisation. The market is becoming increasingly open to innovation and has been hugely receptive to BabyI’s solution.

Why is Rwanda a receptive market for telehealth?

There are some core challenges facing basic healthcare in Rwanda:

- **Doctor patient ratio:** Rwanda have around 1.3 doctors to every 10,000 people, compared to a global average of 15.1 (World Health Statistics 2019), putting a big strain on human resources
- **Population distribution:** though their population (12.3 million) is densely packed, **64% live in rural areas**, without access to physical healthcare infrastructure or a stable internet connection – the latter is a particular challenge for telehealth solutions

Overview of the Rwandan healthcare system



Source: GSMA, 2020

But there are also big efforts to overcome these challenges, and healthcare is a priority for the government:

- **Health insurance:** Rwanda has a healthcare insurance system ensuring reasonable healthcare services that **covers 90% of the population**
- **Smart Rwanda:** the government has outlined an initiative to create a "Smart Rwanda", driving support from investors and development partners – however, digital health is generally lagging behind in this space, and many efforts have been not-for-profit (e.g. BabyI)

- **NGO funding and support:** there are a number of NGOs working with the Rwandan government to support its Health Management Information System, including WHO, UNICEF and the Bill and Melinda Gates Foundation

How are Babylon addressing Rwanda's challenges?

A big challenge for even telehealth solutions in Rwanda is the lack of access to digital infrastructure. In addition, GNI per capita is relatively low at \$1,959, compared to a global average of \$15,745 (World Bank, 2018) – much of the population live below the poverty line, therefore digital solutions have to be affordable, and realistic.

However, feature phones are seeing increased use, and digital literacy is improving. Key to Babylon's success is the fact that patients can access its telehealth services via text or voice – they do not require multimedia or internet plans, making it accessible to farther reaches of the population.

Since its launch in 2016, over **1.2 million consultations** have happened via Babylon in Rwanda, with over 30% of the adult population (>2million users) being registered. Patients can have consultations with a doctor or nurse, as well as prescriptions, lab requests and referrals from their mobile phone within minutes. This boosts efficiency and frees up strain on healthcare providers.

However, there are still opportunities for Rwanda to refine and expand its digital health proposition, namely through encouraging digital health start-ups to work more closely with MNOs to scale solutions and continuing to prioritise applications/services that will help overcome workforce shortages.

The future of telehealth in emerging markets

The Babylon Health example illustrates the applicability of telehealth solutions to overcoming some of the core challenges that face emerging markets.

However, more developed markets are also benefiting from investing in telehealth, and also face challenges with meeting the 3 core goals for healthcare outlined above. With COVID-19 putting additional strain on the sector, many are turning to telehealth.

Babylon alone has partnered to offer a number of solutions, for example offering **virtual GP consultations** and easing the strain on **A&E departments** for the UK's national health service (NHS), as well as offering a range of virtual services with TELUS Health across regional markets. You can hear more about TELUS and Babylon's partnership, including potential partnership models, [here](#).

Telehealth is a space to watch, addressing key challenges in developed and developing markets, and making big promises for one of the most resource-strained industries. COVID-19 has only accelerated demand and presented MNOs with an ideal platform to bolster their digital health play.

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