

# 精準健康產業的國際佈局

錢宗良

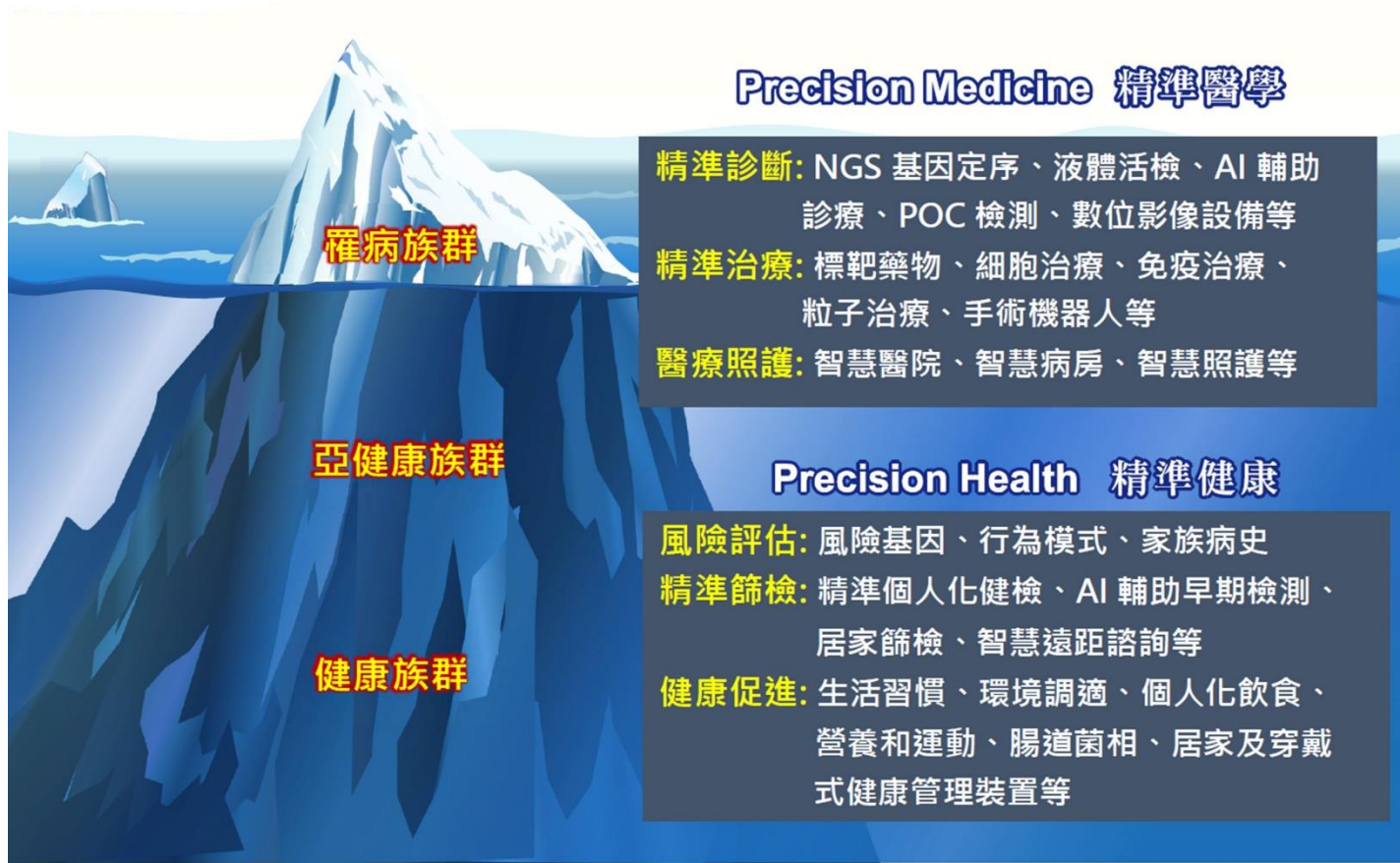
Chung-Liang Chien, Ph.D.

Professor, College of Medicine, National Taiwan University  
CEO, Institute for Biotechnology and Medicine Industry

# 上課大綱

1. 精準健康與精準醫學
2. 臺灣精準健康產業：資通訊＋生醫產業
3. 國際行銷臺灣健康產業：生策會的任務

# 精準醫學與精準健康： 誰是未來大健康產業的藍海？



## Precision Medicine 精準醫學

**精準診斷:** NGS 基因定序、液體活檢、AI 輔助  
診療、POC 檢測、數位影像設備等

**精準治療:** 標靶藥物、細胞治療、免疫治療、  
粒子治療、手術機器人等

**醫療照護:** 智慧醫院、智慧病房、智慧照護等

## Precision Health 精準健康

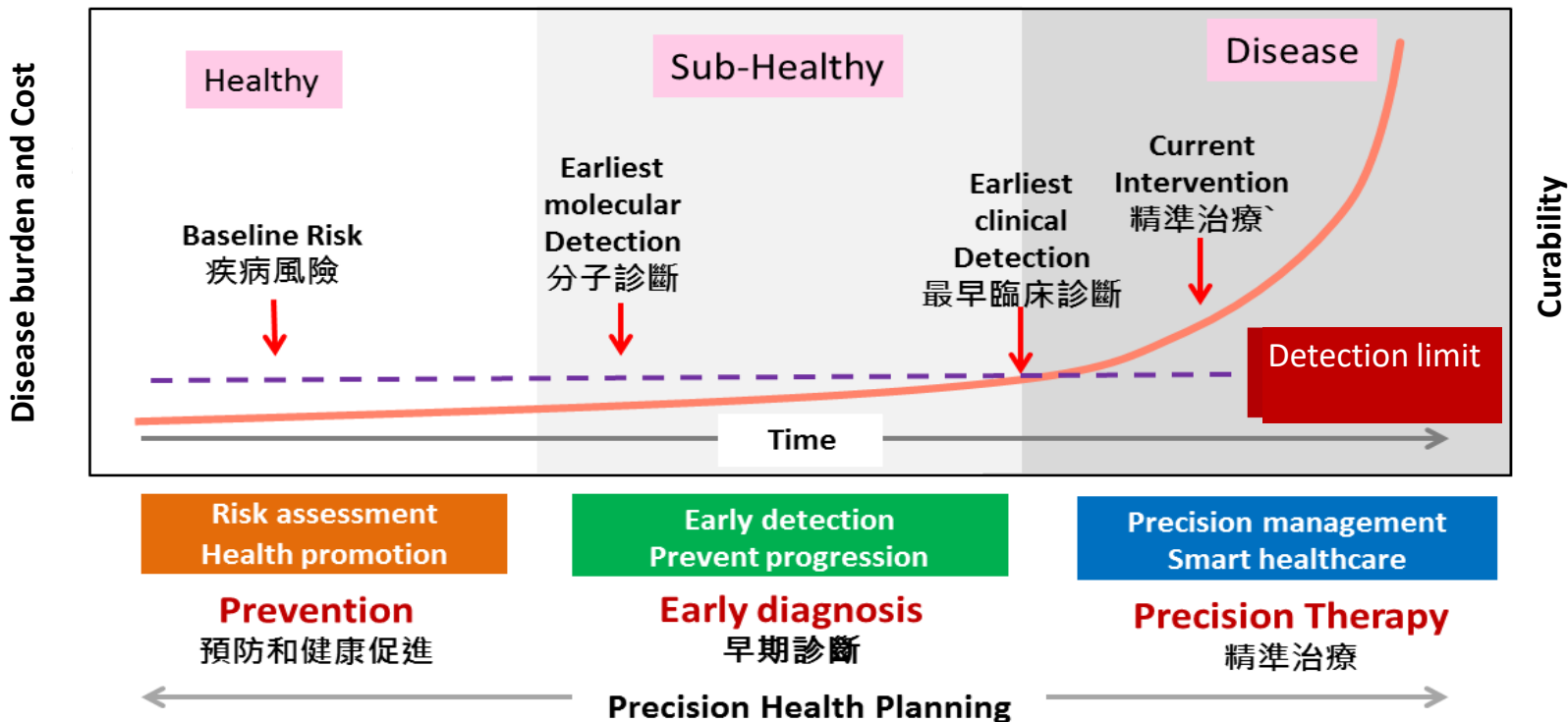
**風險評估:** 風險基因、行為模式、家族病史

**精準篩檢:** 精準個人化健檢、AI 輔助早期檢測、  
居家篩檢、智慧遠距諮詢等

**健康促進:** 生活習慣、環境調適、個人化飲食、  
營養和運動、腸道菌相、居家及穿戴  
式健康管理裝置等

# Healthcare from disease treatment to prevention

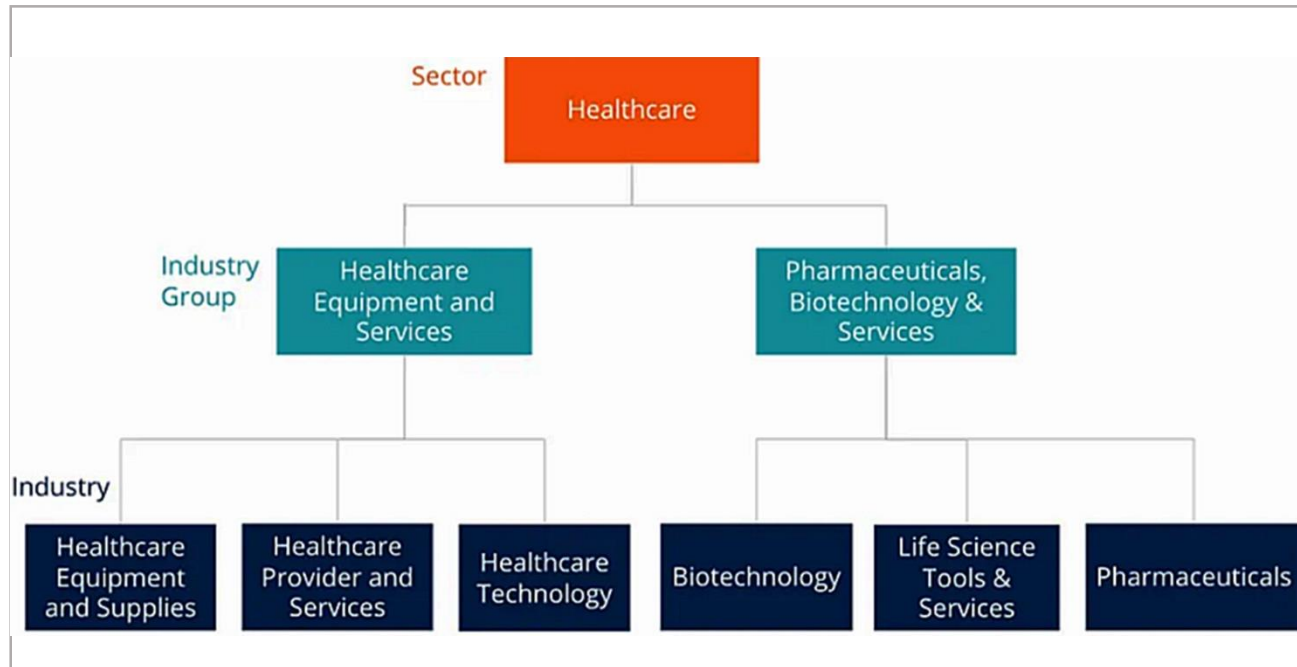
- Healthcare nowadays provides individuals with products and services ranging from prevention, health promotion, diagnosis to treatment.





# Healthcare sector by GICS definition

- The healthcare sector includes the following subsections, as per Global Industry Classification Standard (GICS)

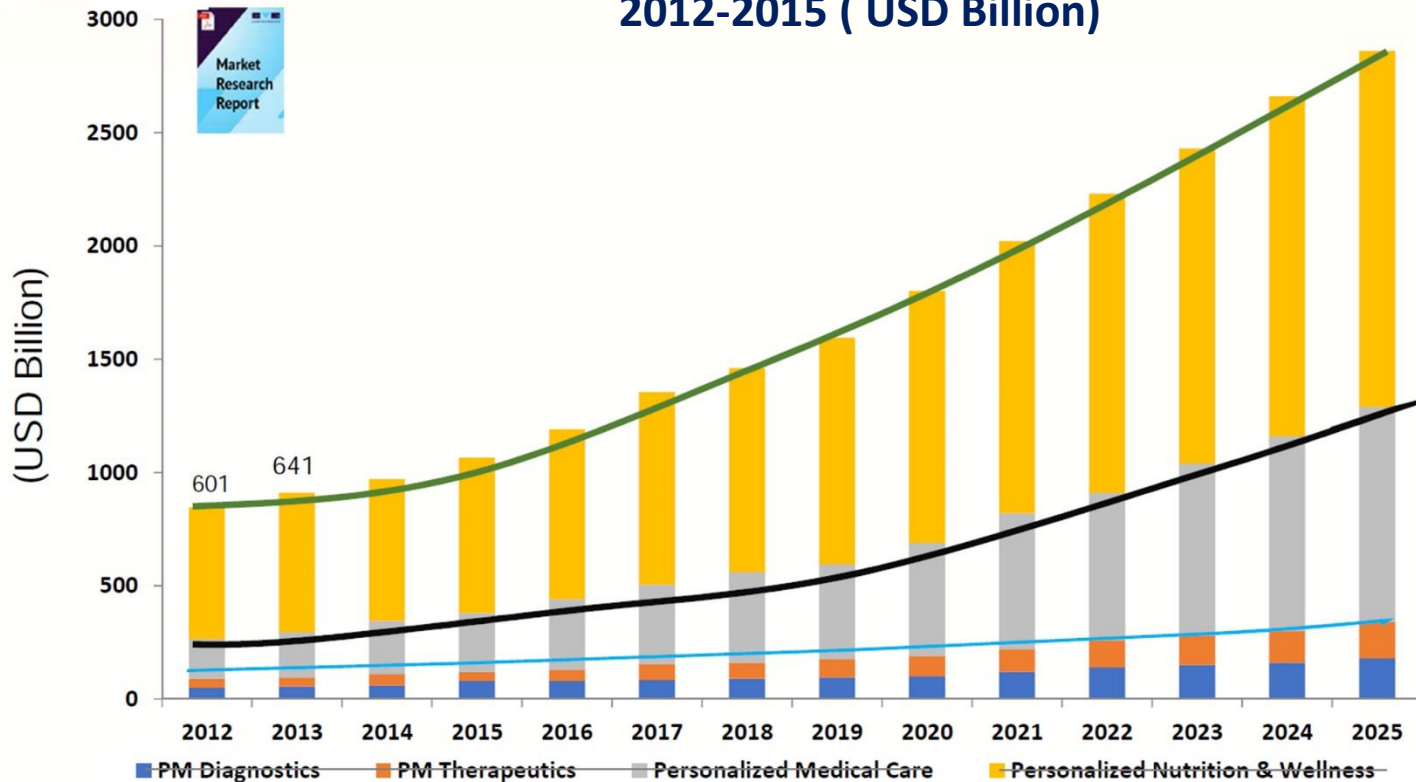


## Global Markets:

- International Healthcare
- Bio-pharmaceutical
- Medical device
- Regenerative medicine
- Smart health
- Precision medicine
- Sports medicine

# Global Precision Healthcare Market 精準健康產業之市場預測

2012-2015 ( USD Billion)



精準醫療

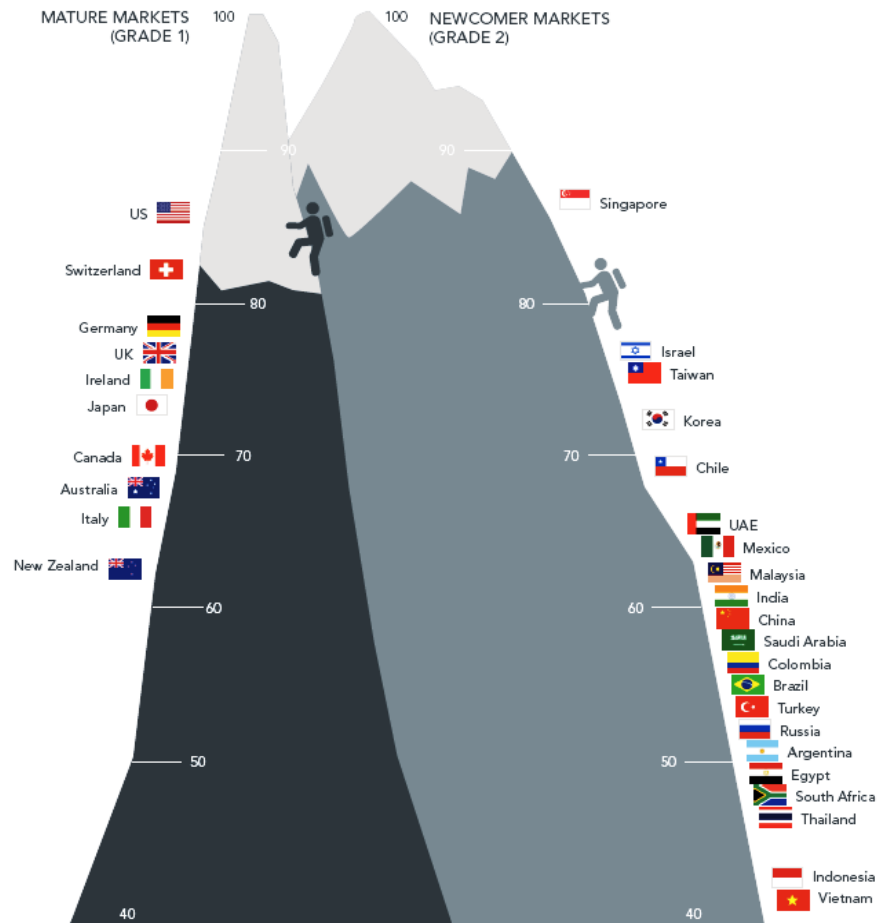
健康福祉

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# Taiwan Core Competences

- Taiwan ranks 3rd in the newcomer markets
- World-class quality of medicine and talent
- The best healthcare system and big data
- High quality clinical trials and R&D capacity
- Well-established research infrastructure
- ICT supply chain, talent and manufacturing
- AI and 5G R&D in national level



Source compiled by IBMI, RBMP (2021)

# Key drivers of Taiwan's healthcare industry

**Advanced Medical Care**



**High Quality R&D and MFG**



**Strong ICT and Elec. Tech.**



# Advantages of Taiwan Medicine

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## Outstanding Healthcare Insurance System

- ❖ 99.6 % of Taiwan's 23.57 million people covered under the government-run National Health Insurance (NHI)
- ❖ Good accessibility-The NHI has a very high approval rate among Taiwanese people



## High Quality Healthcare Services

- ❖ Out of 200 of the largest hospitals in the world, 14 are in Taiwan.
- ❖ Taiwan ranks third, just after the USA and Germany, in terms of medical service quality.
- ❖ shorter wait times for beds in large hospitals and medical centers



## World-class Health Database

- ❖ National Health Insurance Research Database has been collected for more than 25 years (Since 1995).
- ❖ Medical centers with complete medical record and imaging data

# Advantages of Taiwan ICT industry



## Most concentrated industry clusters

- ❖ World's densest and most technologically advanced semiconductor production base.
- ❖ The Major Procurement Center for Global ICT Companies & Buyers



## Strong ICT manufacturing capabilities

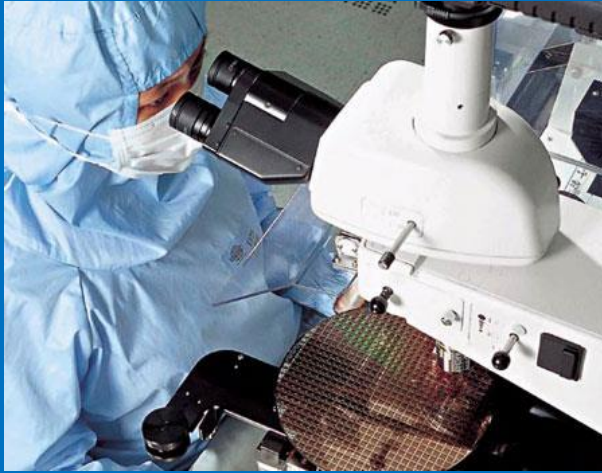
- ❖ Rich manufacturing experience and outstanding technologies
- ❖ The heart of the world's tech supply chain, offering high-quality products from IC design, semiconductor, to electronics.



## Rapid Commercialization

- ❖ Ranked 1st in Worldwide Major ICT product market share for more than 10 products
- ❖ High levels of hardware/software integration capability for flexible production and rapid commercialization





ICT



Hospital



Smart Hospital



Healthcare IoT  
Platform



Health AI



Medical &  
Wearable Devices



Hospital  
Equipment



# Cross-industry cooperation at a glance



- 1) AI medical platform
- 2) Telemedicine / remote care
- 3) AI-assisted arrhythmia diagnosis
- 4) AIoT device/equipment



- 1) Genome database for Chinese
- 2) Medical wearables
- 3) Epidemic management products
- 4) Proton therapy / 8K medical imaging



- 1) Innovative devices / AI diagnostics
- 2) Health & chronic disease management
- 3) Medical imaging for animals
- 4) Cell therapy / AIoT solutions



- 1) Miniaturization of medical equipment
- 2) Exoskeleton / assistive devices
- 3) AI dialysis / medical AI imaging
- 4) Digital pathology / health management



- 1) Telehealth / IoT products
- 2) Auto detection of CTC
- 3) Data integration of sports health
- 4) AI-assisted detection of disease

# Taiwan's ICT Sector in Healthcare

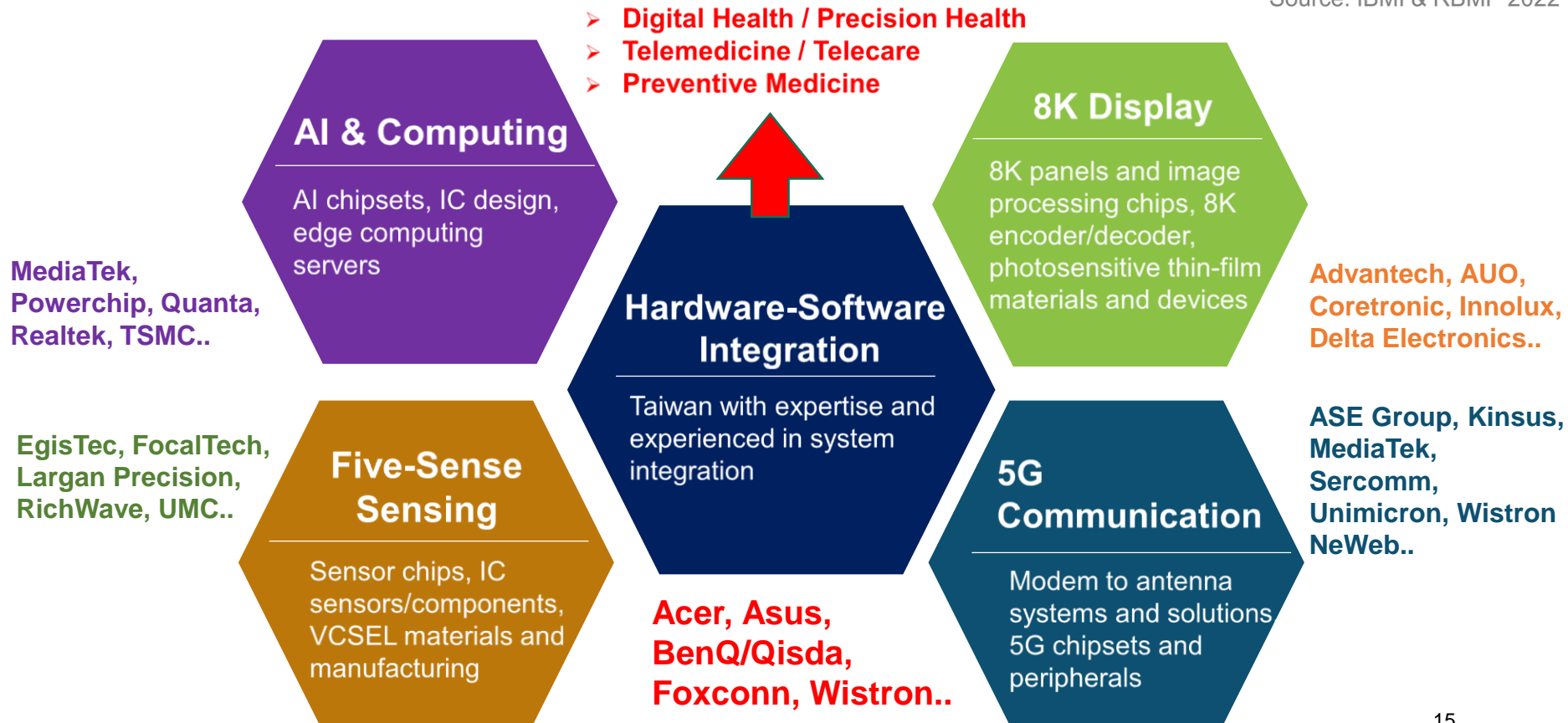
## Precision Healthcare Industry

	Mobile health	Medical equipment	Smart hospital	Gene/cell therapy	Biomedicine	
Companies						
Product pipelines	<ul style="list-style-type: none"> <li>■ Tele-healthcare</li> <li>■ IoT solutions</li> <li>■ Wearables</li> <li>■ Health management</li> </ul>	<ul style="list-style-type: none"> <li>■ X ray/ultrasound</li> <li>■ Micro CT</li> <li>■ Surgical robots</li> <li>■ Capsule endoscopy</li> <li>■ Hemodialyzer</li> <li>■ Pathology/AI Image</li> <li>■ Vital sign monitor</li> </ul>	<ul style="list-style-type: none"> <li>■ Smart ward/operating room</li> <li>■ Surgical VR</li> <li>■ AI solution</li> <li>■ HMS</li> <li>■ EMR / EHR</li> <li>■ Medical display</li> </ul>	<ul style="list-style-type: none"> <li>■ DNA sequencer</li> <li>■ DNA microarray</li> <li>■ Protein &amp; genetic testing</li> <li>■ CTC system</li> <li>■ Cellular therapy</li> </ul>	<ul style="list-style-type: none"> <li>■ AI chip</li> <li>■ Biochip for gene sequencing</li> <li>■ RF &amp; Wireless chip</li> <li>■ Biosensor</li> <li>■ Display component</li> <li>■ Organic semiconductor</li> </ul>	
Areas of application						

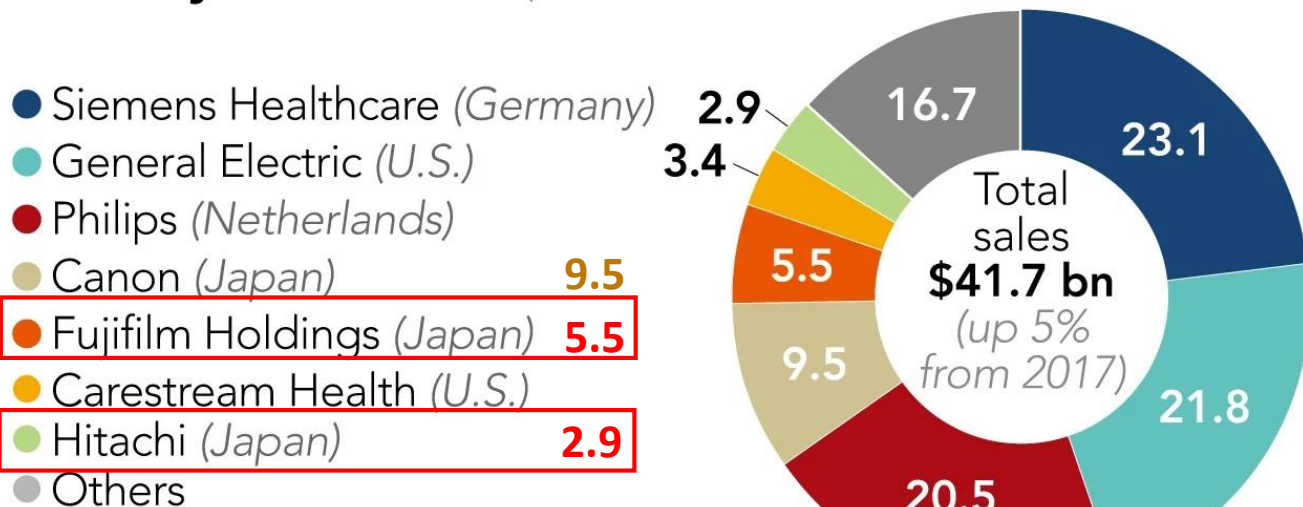
# Taiwan Industry Overview

## Market Players and Focus Areas

Source: IBMI & RBMP 2022



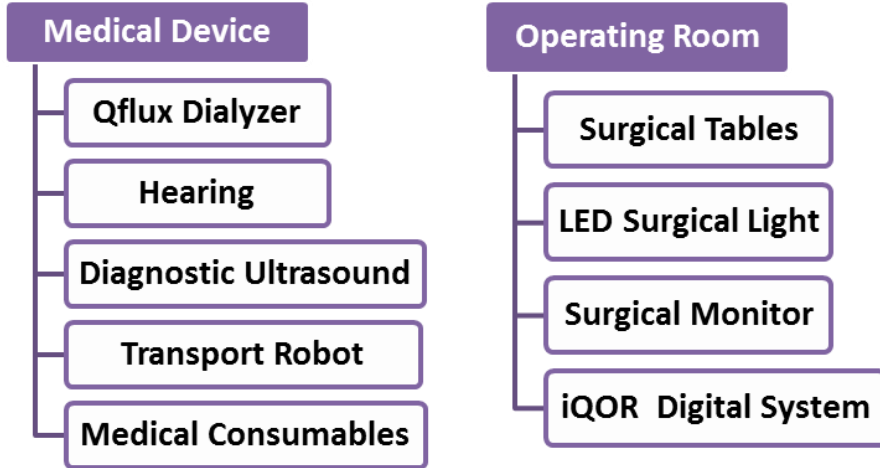
## Diagnostic imaging equipment global market share by sales (2018, in percent)



Source: Evaluate **8.4+ 9.5 =17.9 (Japan)**

2月18日，富士表示：「兩家企業合併後，會將各自影像處理和人工智慧軟體和日立超音波、MRI 結合，**打包販售給醫療機構**。」 **To provide the total solution!**

### Featured Products



### Solutions

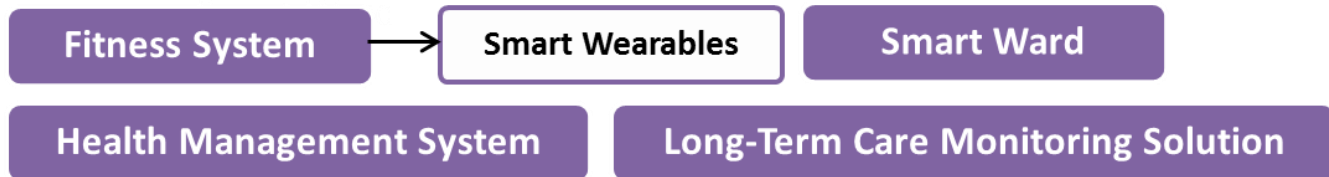
Smart Operation Room



ODM / OEM of Medical Device

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### Other Smart Healthcare Solutions



### Featured Products

Medical Carts



Medical Computers



Medical Tablets



Medical Monitor

Surgical Monitor

Diagnostic Monitor

Clinical Monitor

Intelligent Power System

Medical Power Storage System

Smart Battery Kit

Intelligent Power Storage System



### Smart Hospital Solutions

Medical Workstation

Smart Ward

Smart Clinic

Smart Nurse Station

Medication Administration

Telehealth Applications



## Big Data Analysis on Genetics

**Cancer MoonShot 2020 Project**

**FOXCONN**  
YongLin Healthcare Foundation

**NantWorks**

**华大基因 BGI**

**Chinese Genome Database**

## Cell Therapy

**睿田生技 Retain Biotech** + **台大醫院 National Taiwan University Hospital**

## Precision Medicine

**康聯預防醫學 HEALTHCONN** **Genetic Tests**

Bra Heart Lungs Liver Stomach Colorectal

## Healthcare Management

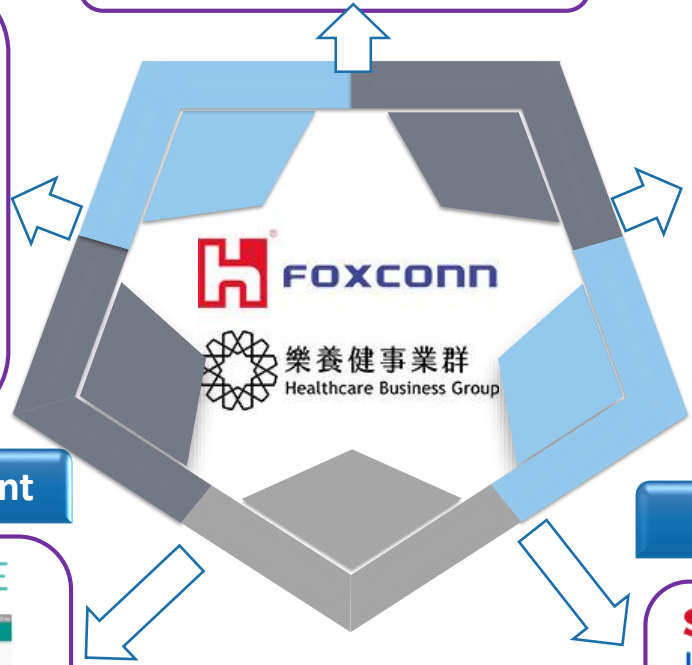
**永悦健管 Yongyue Health Management** **H2U LIFE**

(a) (b) (c)

## Molecular Detection

**SHARP LIFE SCIENCE** **BioChip**

**睿軒檢驗科技 Rapidsure Tech** **Food Science**



# Taiwan leading hospitals are expanding their productivity from building smart hospital...



彰化基督教醫院  
CHANGHUA CHRISTIAN HOSPITAL



員林基督教醫院  
Yuanlin Christian Hospital



U.S. Green Building Council  
LEED Gold Level Certification on  
Dec, 2015



ICT Players launch products and solutions:

- ◆ Smart Nurse Station
- ◆ Smart Ward
- ◆ Smart Clinic
- ◆ Smart Counter
- ◆ Smart Dialysis
- ◆ Smart Operation Room
- ◆ Multimedia interaction
- ◆ Accompany robot
- ◆ Logistics Management





# Smart Ward: Beside Infotainment System

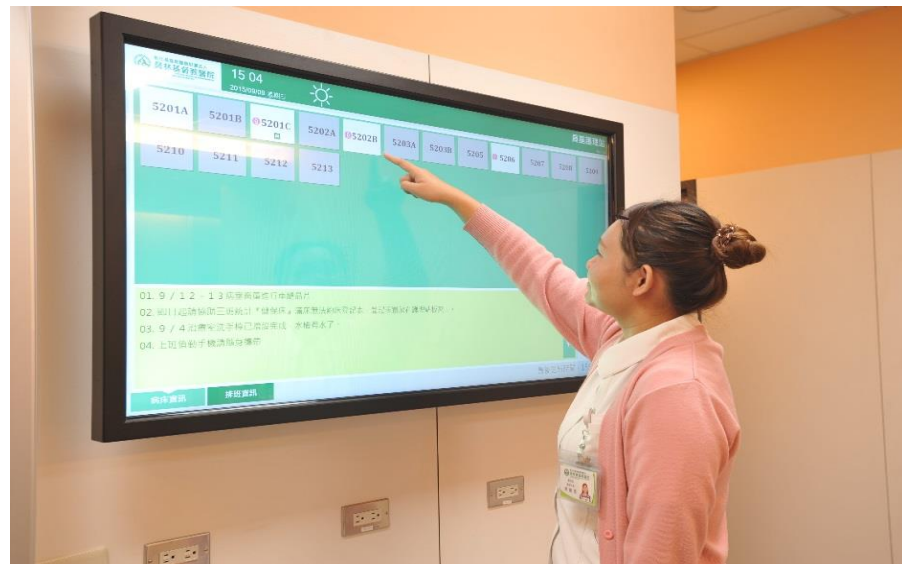
- ◆ Interactive environment
- ◆ Disclosure real-time information
- ◆ Treatment schedule



# Smart Nurse Station: Nursing Dashboard

Improvement Nurse Care Quality and Work Flow

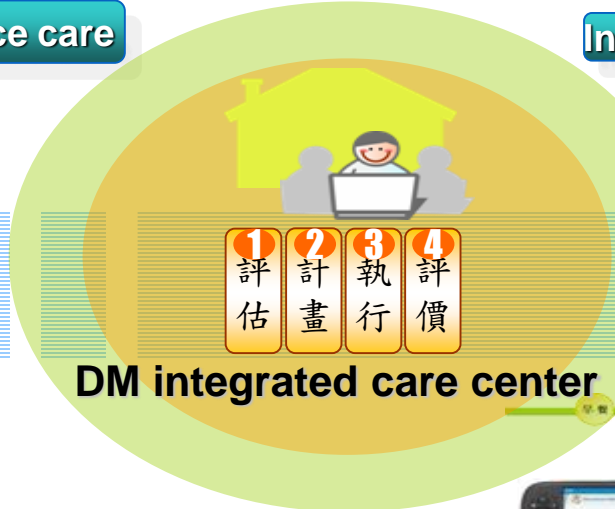
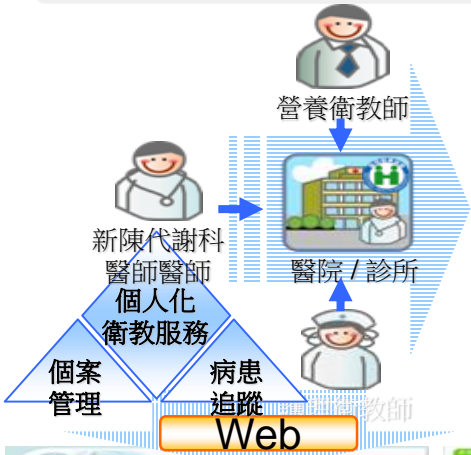
1. No paper works
2. Real time nursing shifting
3. Real time patient information (location, activity, schedule )
4. Pre-alarm system



# Telecare: Diabetes Integrated Health Care Center

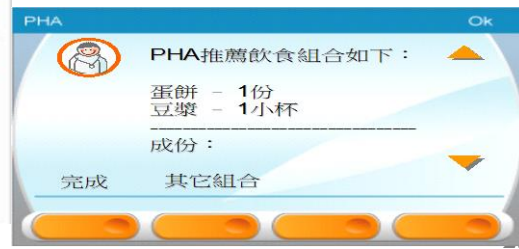
Hospital visit / Long-distance care

Individualized devices



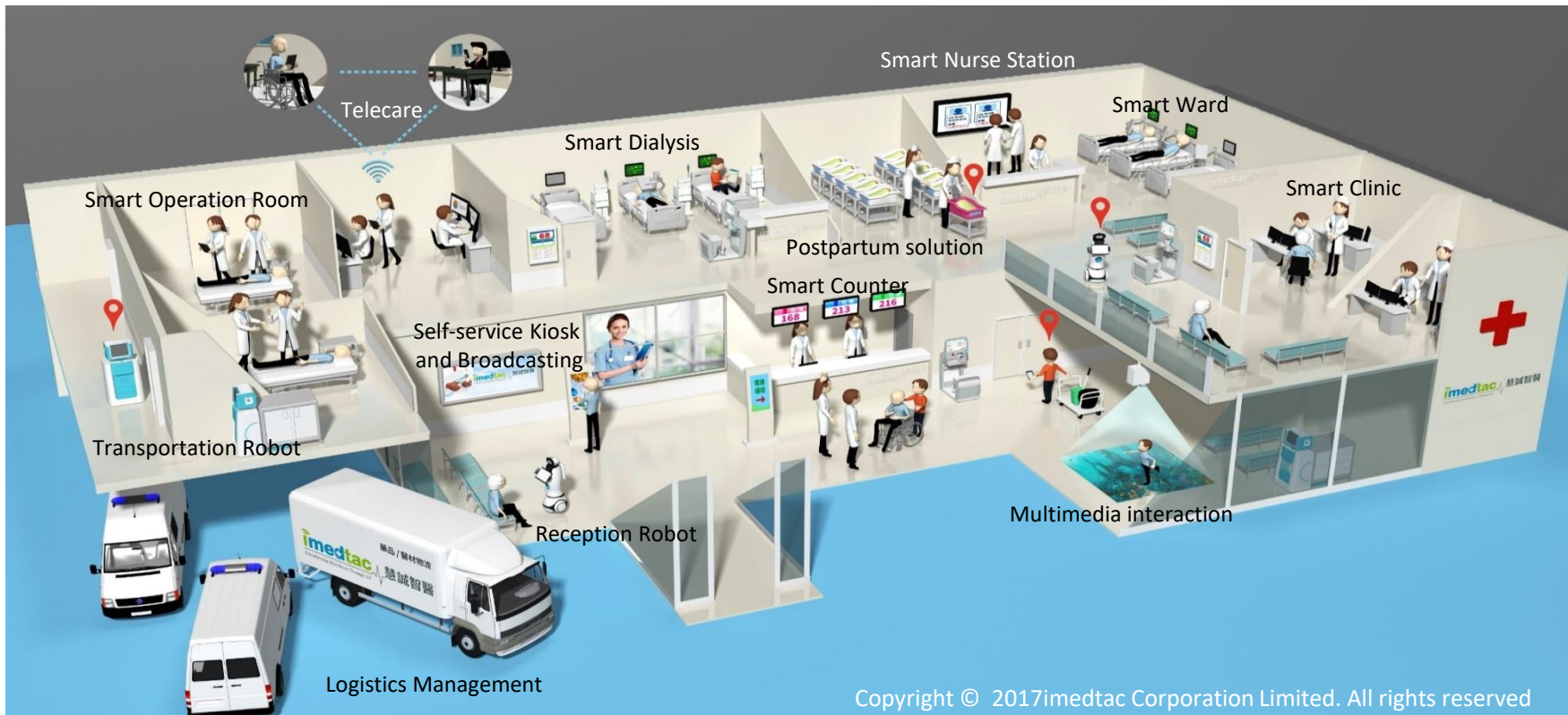
AJAX動態網頁流覽

行動、藍芽健康照護手機



# Integrated Solutions in Smart Hospital

Modularize IoT for Hospital and Healthcare Application by **imedtac** 慧誠智醫



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# 社團法人國家生技醫療產業策進會 (IBMI)

Established Year: 2002

·Board of Members: Government Officials/ Leaders from Academia and Medical Centers/ Industrialist



Founded by the former president of the Legislative Yuan of Taiwan, Mr Jin-Pyng Wang, IBMI is an independent, not-for-profit organization voicing Taiwan-based health care industry, promoting interdisciplinary collaborations through its global platform, and creating policy dialogues between public and private sectors. On top of that, IBMI is also a trusted awarding and certification body to health care providers and an incubator to health care startups in areas of novel technologies, services and innovations.



**Founder**  
Jin-Pyng Wang

Former president of  
the Legislative Yuan,  
Taiwan



**President**  
Chi-Huey Wong

Scripps Family  
Chair Professor of  
the Scripps Research  
Institute



**Vice President**  
Barry Lam

Chairman & CEO  
Quanta Group



**Vice President**  
Pan-Chyr Yang

Academician of  
Academia Sinica



**Vice President**  
Chang-Hai Tsai

Chairman of the  
Board of China  
Medical University &  
Health Care System



**Supervisor**  
Wei-Jao Chen

Professor Emeritus,  
Department of  
Surgery, National  
Taiwan University  
College of Medicine

# Our Board

The board members consist of leaders from hospitals and R&D institutes, and C-level representatives from electronics, ICT, biotech and pharmaceutical sectors. Currently, IBMI has more than 400 members from across industries relating to health care.

## Healthcare

Chang Gung Memorial Hospital  
Changhua Christian Hospital  
China Medical University Hospital  
College of Medicine National Taiwan University  
Hualien Tzu Chi Hospital  
Kaohsiung Medical University Hospital  
MacKay Memorial Hospital  
National Cheng Kung University Hospital  
National Defense Medical Center  
Shin Kong Wu Ho-Su Memorial Hospital  
Show Chwan Memorial Hospital  
Taichung Veterans General Hospital  
Taipei Medical University  
Taipei Medical University-Shuang Ho Hospital  
Ten-Chen Medical Group  
Tri-Service General Hospital  
Wei Gong Memorial Hospital

## Research & development

Development Center of Biotechnology  
Industrial Technology Research Institute  
KPMG in Taiwan  
National Health Research Institutes

## Electronic & ICT

Advantech Co., Ltd.  
Catcher Technology Co., Ltd.  
Foxconn health technology business group  
iKala Interactive Media Inc.  
Pegatron Corp.  
Powerchip Semiconductor Manufacturing Corp.  
Qisda Corp.(BenQ)  
Realtek Semiconductor Corp.  
Topco Group  
Wistron Corp.

## Bio-Pharmaceutical

Bora Pharmaceuticals Ltd.  
Maywufa Biopharma Group  
Missioncare Medicine Co. Ltd.  
St.Shine Optical Co., Ltd.  
CHC Healthcare Group  
Orient Pharma Co., Ltd.

**380**  
**Core Members**

FOXCONN

ADVANTECH

BENQ

REALTEK  
瑞昱半導體股份有限公司

CATCHER  
smart process

WISTRON

PEGATRON  
和碩聯合科技

TSC  
群創科技

PSC  
力晶半導體

Powerchip Semiconductor Corp.

iKala

# Integrate resources and promote the biomedical and healthcare industry

## Policy Think Tank

- Act for the Development of Biotech and New Pharmaceuticals Industry.
- Cross-Strait Cooperation Agreement on Medicine and Public Health Affairs.
- Amendment of the Fundamental Science and Technology Act.
- The Human Biological Database Management Act
- Pharmaceutical Affairs Law and Medical Care Act
- 33 biomedical policies

## Partnership & Collaboration

- Healthcare + Expo Taiwan
- Taiwan Healthcare + Portal
- MEDTEX Summit Asia
- International Hospital Leadership conference
- Bio Taiwan Highlights



## Awards & Certification

- Symbol of National Quality (SNQ) accreditation & certification
- National Innovation Awards

## Startup Incubation

- Allied with 36 Universities & Research Institutes
- Startup Angel investment





# 衛生福利部 111年度 新南向醫衛資源整合平臺計畫



社團法人  
國家生技醫療產業策進會  
I.B.M.I. Institute for Biotechnology and Medicine Industry

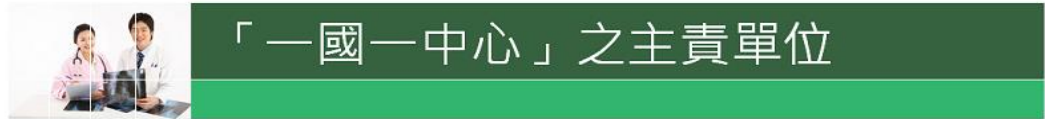


財團法人  
生技醫療科技政策研究中心  
Research Center for Biotechnology and Medicine Policy

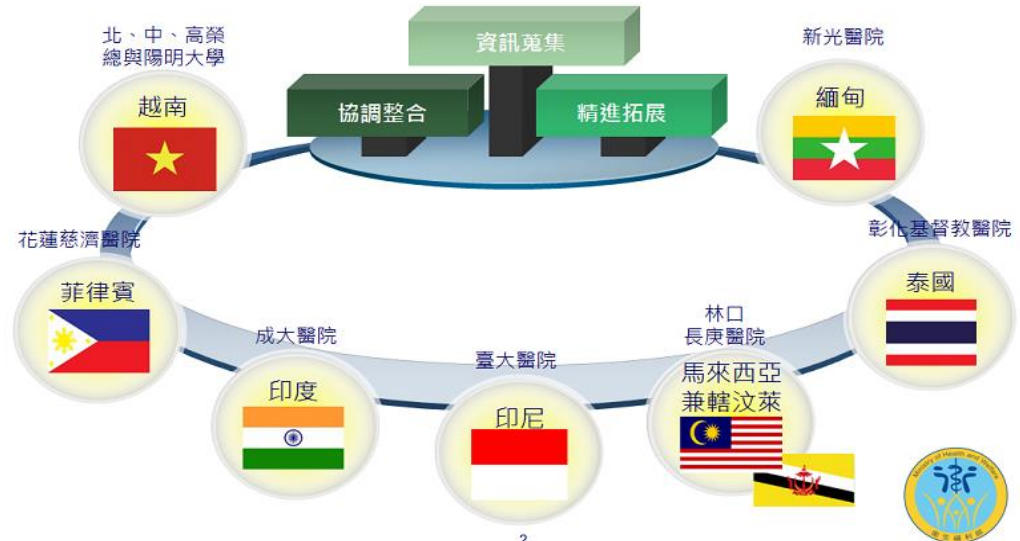
計畫主持人: 錢宗良執行長

- ❑ Taiwan has become the most important exporting Smart Hospital Solution country in Asia.
- ❑ Offer Total solutions to assist Asia countries to build smart hospitals or improve hospital management effectiveness.

- Thailand (彰基)
- Malaysia (長庚+中國附醫)
- India (成大)
- Vietnam (榮總+高醫)
- Indonesia (台大+亞東)
- Philippine (慈濟)
- Myanmar (新光)



透過委託具醫學中心量能之機構，在當地執行一國一中心計畫。



# 1 Country 1 Center Highlights

## Thailand

**Changhua Christian Hospital  
Smart Hospital**  
Cooperate with Chunghwa Telecom/ Thonburi Hospital Group



## India

**National Cheng Kung University Hospital**  
built an image storage system to improve the efficiency of medical service in India.

## Indonesia

**National Taiwan University Hospital  
Overseas Consultation Physicians" and  
"Overseas Health Managers" in 2019  
Far Eastern Memorial Hospital**  
Using its own telemedicine app to have consultations with a Kota Medan patient.



## Vietnam

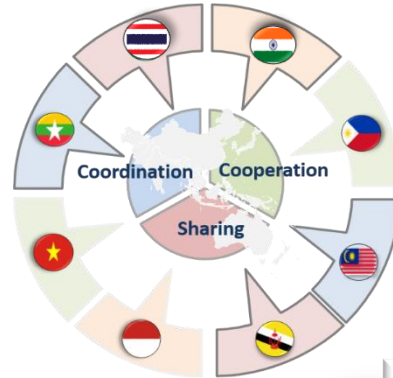
**Veterans General Hospitals & National  
Yang Ming Chiao Tung University  
Taipei VGH** Performed a critical liver transplant surgery for a boy from Vietnam in 2020.

**Kaohsiung Medical University Chung-Ho  
Memorial Hospital (KMUH)**  
University Medical Shing Mark Hospital, the largest Taiwan-funded hospital in Vietnam consulted KMUH about epidemic prevention



## Myanmar

**Shin Kong Wo Ho-Su  
Memorial Hospital**  
Operation for a Burmese teenager with hand deformities.



## Philippines

**Hualien Tzu Chi Hospital**  
Established Tzu Chi Great Love Eye Center in 2008;



## Malaysia/Brunei

**Chang Gung Memorial Hospital**  
To provide update health education and personalized information to international patients interactively.

**China Medical University Hospital**  
Conducted Cell Therapy research with Malaysia Association for Cell Therapy (MACT)





# 《主責新南向政策醫衛產業供應鏈工作小組》 醫衛產業合作搭橋



## 台灣利基醫衛產業鏈

### 數位醫療

企業

產品

- ✓ 遠距照護系統
- ✓ IoT設備/維修
- ✓ 穿戴式裝置
- ✓ 健康數據監測分析與管理系統

### 醫材設備

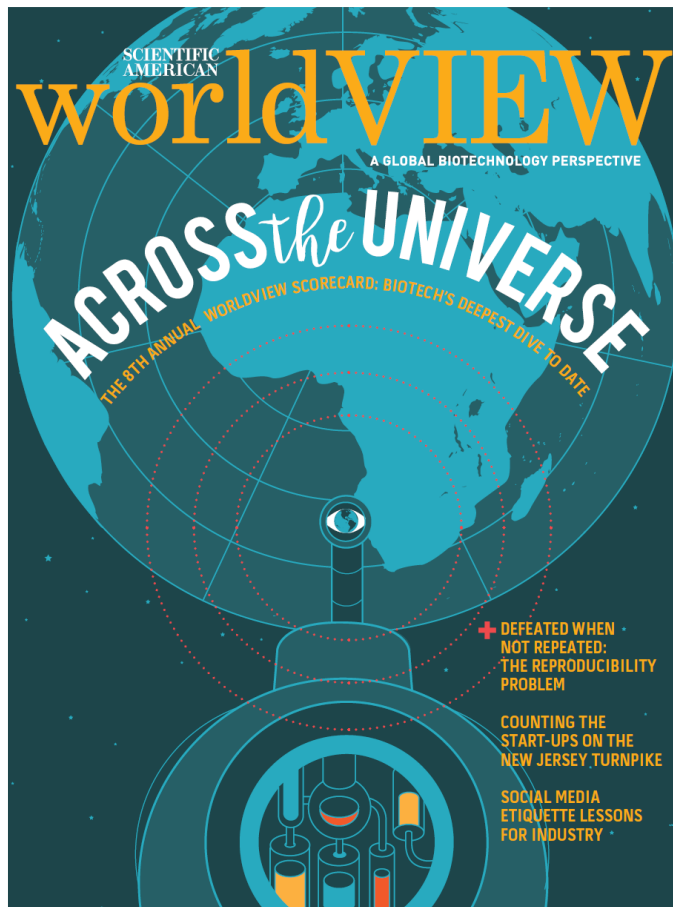
- ✓ 血液透析器
- ✓ 微型電腦斷層
- ✓ X光/超音波
- ✓ 生理監測設備
- ✓ 膠囊內視鏡

### 細胞治療

- ✓ CTC檢測系統
- ✓ 細胞療法
- ✓ 基因定序及晶片
- ✓ 蛋白質與基因檢測

### 精準檢測

- ✓ AI晶片
- ✓ 有機半導體元件
- ✓ 影像顯示元件
- ✓ 體徵訊號量測感應器



## 2016 & 2020 Scientific American

### WORLDVIEW SCORECARD

-  PRODUCTIVITY
-  IP PROTECTION
-  INTENSITY
-  ENTERPRISE SUPPORT
-  EDUCATION/WORKFORCE
-  FOUNDATIONS
-  POLICY & STABILITY



*Enhanced with a new guidebook and region-specific ratings, the 2016 Scorecard ventures deeper than ever to track down the latest in biotech innovation*



# Taiwan,

Country Rank  
23 / 54

2020

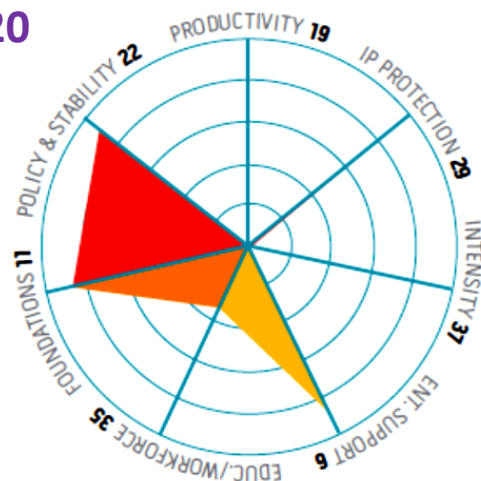
SAWV SC rank: 23

Population: 23,359,928

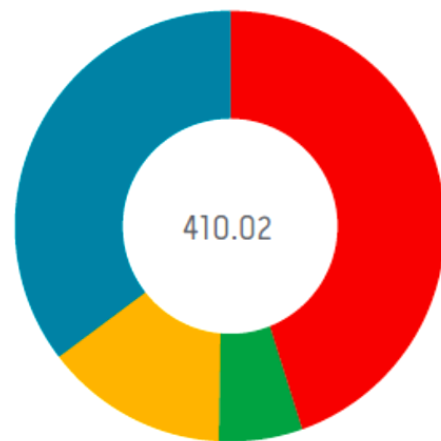
GDP: 489

R&D/GDP: 0

**W**ith an overall average of 22.4 on the SC, Taiwan's ranking of 23rd in 2016 is just about on par, and it performs even better on the *Nature Index 2015 Global*, with an 18th place overall ranking and its National Taiwan University landing in the top 100. Moreover, Taiwan advertises its biotechnology capabilities through international events, including BioTaiwan 2016. This will be the 14th annual event, and it will include presentations from companies around the world, as well as one-on-one partnering, seminars and workshops. A large exhibition is also expected, including more than 1,200 booths from 600 companies. On



August 20, 2015, *Taiwan Today* reported, "A wide-ranging development plan targeting Taiwan's biotechnology-based economy is set to kick off next year, according to Premier Mao Chi-kuo." The report continued: "Focusing on agriculture, biomedicine, food, health care and medical instruments, the 10 year initiative will potentially expand the scale of the local bioeconomy to



NT\$4 trillion (US\$123.2 billion) in 2026." With respectable scores on the SC's Foundations and Enterprise Support categories, Taiwan's commitment to innovation is clear. Like many other countries, however, Taiwan's Education/Workforce category shows room for improvement.

Source data from *Scientific American Worldview* (<http://www.saworldview.com>)

## 2016 Scientific American Worldview -A Global Biotechnology Perspective

### Asian Countries' Performance

Country	Global Ranking	Productivity	IP Protection	Intensity	Enterprise Support	Education/ Workforce	Foundations	Policy & Stability
Singapore	2	---	8.3	3.8	9.2	4.5	6.6	9.6
Hong Kong	11	0.0	7.1	1.6	8.6	1.6	6.7	9.0
Japan	15	0.1	9.2	0.6	4.5	3.6	7.9	8.0
Taiwan (Score/Rank)	23	0.0/19	5.8/29	0.1/37	7.0/6	2.6/35	6.9/11	7.2/22
South Korea	24	---	5.6	0.6	4.8	3.9	8.3	6.3
Malaysia	27	---	5.5	1.1	8.0	2.1	4.9	5.9
China	41	0.1	4.7	0.6	4.5	1.3	4.0	2.9
Thailand	45	---	2.3	3.0	3.4	2.7	3.0	1.8
India	49	0.0	4.3	0.8	3.5	0.2	1.6	2.0

Source: 2016 Scientific American Worldview

## CATEGORY QUICK GUIDE

### #1 PRODUCTIVITY *Publicly traded biotechnology companies and output*

- 1.1 Public company revenues (US\$m)
- 1.2 Public companies

### #2 IP PROTECTION *Quantitative and qualitative intellectual property protection*

- 2.1 Patent strength
- 2.2 Perceived IP protection

### #3 INTENSITY *Effort in biotechnology innovation*

- 3.1 Public companies / million population
- 3.2 Public company employees / capita
- 3.3 Public company revenues / \$B GDP
- 3.4 Biotech patents / total patents filed with PCT
- 3.5 Value added of knowledge- and technology-intensive industries
- 3.6 Business expenditures on biotechnology R&D

### #4 ENTERPRISE SUPPORT *Business environment and capital availability*

- 4.1 Business friendly environment (higher = better)
- 4.2 Biotech VC, 2007 (\$mm)
- 4.3 VC availability
- 4.4 Capital availability

### #5 EDUCATION/WORKFORCE *People trained in biotechnology*

- 5.1 Post-secondary science graduates / capita
- 5.2 Ph.D. graduates in life sciences per million population
- 5.3 R&D personnel per thousand employment
- 5.4 Talent retention (reciprocal of brain drain)
- 5.5 Brain gain (share of global students studying outside their country)

### #6 FOUNDATIONS *Infrastructure and R&D drivers*

- 6.1 Business expenditures on R&D (% of GDP)
- 6.2 Gross domestic expenditure on R&D (% of GDP)
- 6.3 Infrastructure quality (roads, ports, electricity, etc.)
- 6.4 Entrepreneurship and opportunity

### #7 POLICY & STABILITY *Government control*

- 7.1 Political stability and absence of violence/terrorism
- 7.2 Government effectiveness
- 7.3 Regulatory quality
- 7.4 Rule of law





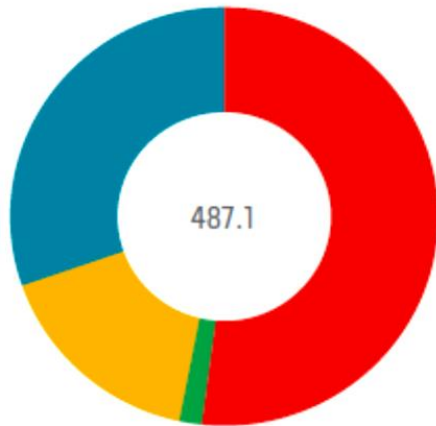
# Singapore

SAWV SC rank: 2  
 Population: 5,567,301  
 GDP: 298  
 R&D/GDP: 2

**S**ingapore can boast a top 10 finish throughout the SC's history, and a top five finish in every year except 2011. It also scores well on other measurements: 15th for output in the *Nature Index 2015 Global*, with more than half of the publications in chemistry; and fifth on the 2015 BCI index, which stated: "Singapore has relatively strong

capabilities in R&D and manufacturing, with most of the necessary regulatory frameworks and safeguards in place and in line with international best practices." In part, ongoing investment in science and technology explains Singapore's high ranking. On January 12, 2016, for example, *ScienceInsider* reported, "The government of Singapore has announced that it plans to spend [US\$13.2 billion] on research and development between 2016 and 2020." In addition, the National University of Singapore opened a US\$25 million synthetic biology center on September 30, 2015. Other news reveals the allure of Singapore as an international leader in science. For instance, Rockefeller University plant molecular biologist Nam-Hai Chua announced plans to move his research—exploring plant RNA's impact on drought tolerance—to Singapore's Temasek Life Sciences Laboratory. Indeed, Singapore is a go-to country for biotechnology research, as well as for R&D in general.

Country Rank  
 2 / 54  
 2020



In part, ongoing investment in science and technology explains Singapore's high ranking.

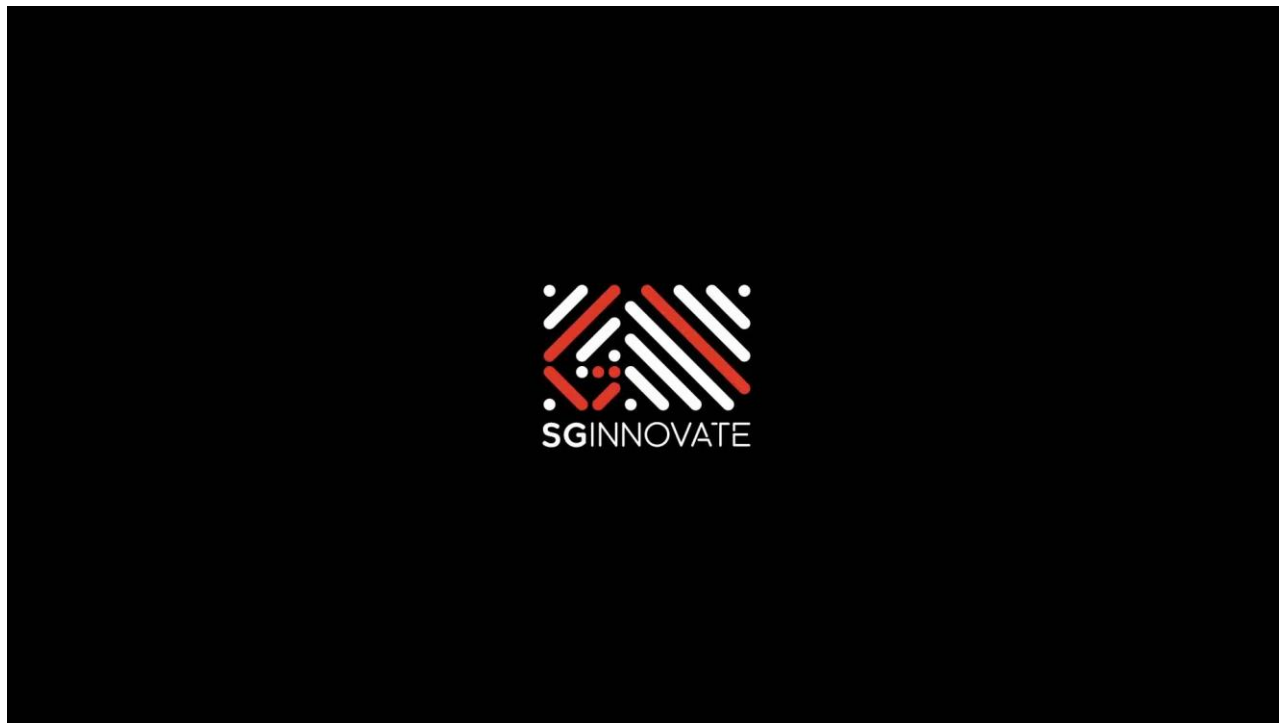
The top-ranked countries in *Government effectiveness* are [Singapore](#), [Switzerland](#), and [Finland](#).

**新加坡**：非常積極推動生技產業國際鏈結，已成功扮演亞太地區領頭羊的角色。針對國際華人健康市場之拓展，臺灣是可以嘗試與新加坡合作，創造雙贏的機會。

The top-ranked countries in *Regulatory quality* are [Singapore](#), [Australia](#), [Canada](#), [Finland](#), [Hong Kong](#), [New Zealand](#), and the [United Kingdom](#). Source data from *Scientific American Worldview* (<http://www.saworldview.com>)



2019年5月23日新加坡  
Medtech Connect 論壇



SGInnovate interview: <https://youtu.be/3ktQSyfe7n0>

# Thailand

Country Rank

45 / 54

SAVV SC rank: 45

Population: 67,741,401

2020

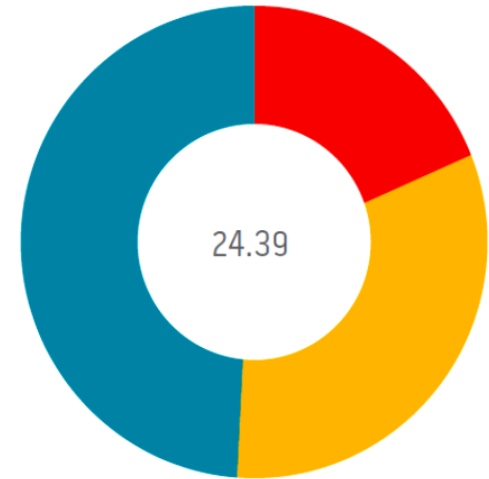
GDP: 387

R&D/GDP: 0.39

**B**etween 2014 and 2016, Thailand bounced around the 40s in the SC rankings—from low to high and back to the mid-40s. Even so, this is a far better showing than its bottom-of-the-list performance in 2013. Similarly, Thailand ranked 42nd on the *Nature Index 2015 Global*. On the plus side, its National Biotechnology Policy Framework aims to push the country much higher as an international force in the industry. In particular, that framework seeks to improve biotechnology education and training. Among the SC categories, Thailand already performs the best in Education/Workforce, and the government's plans



could improve that capability even more. Experts are applauding Thailand's efforts so far, and express tempered optimism about its future prospects. A September 2015 USDA GAIN Report stated: "Thailand made some progress in 2015 on laying out a draft regulatory framework on adopting agricultural biotechnology. Thai biotech proponents are likely to gain more support from



policy makers in both government and parliament. However, it may take a few years to revoke a ban on biotech field trials in the country." Like many other countries that perform poorly on the SC, Thailand needs to drastically improve its IP Protection, as well as its reputation in the SC category of Policy & Stability. A strong biotechnology industry must do well in these areas.



**泰國**：是臺灣可與合作共同拓展國際生技產業的夥伴。特別在農業食品生技與國際醫療服務領域，或將有助營造互利共贏之機會。

The top-ranked countries in *Talent retention* are [Saudi Arabia](#), [Thailand](#), and [Chile](#).

Source data from *Scientific American Worldview* (<http://www.saworldview.com>)



2019年7月10日生策會到泰國曼谷，受泰國醫材公會邀請演講，介紹 Taiwan Healthcare Plus



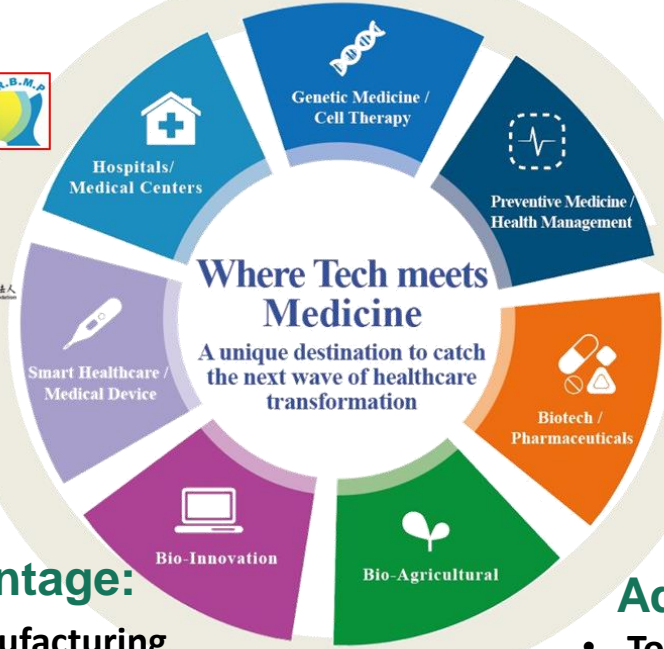
2019年7月11日參加彰化基督教醫院籌劃在曼谷東協醫材展上舉辦的臺灣醫材產品說明會

# Thailand & Taiwan Bilateral Cooperation

MDA2019



Visit CCH 2018



MeDIC F.T.I.



TPHA



TMI



## Advantage:

- Manufacturing
- Investment opportunity
- Clinical Trials

## Advantage:

- Top medicine tourism
- Full support by Thailand 4.0 initiative
- Core position in ASEAN



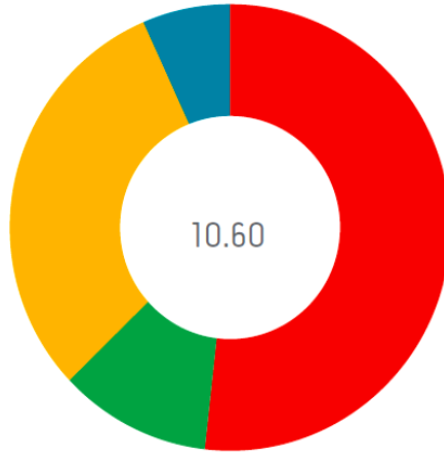
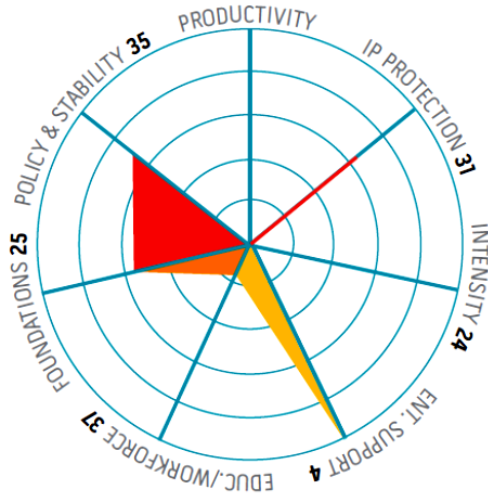
# 新南向政策醫衛產業供應鏈工作：

-新南向國家醫衛合作會議/泰國醫療產業拜會-

台灣醫院(彰基)及產業(中華電信、慧誠智醫、慧德科技、群曜醫電)一同拜會泰國重要醫衛產業協會以及醫院，協助建立合作橋梁。

Sept. 5-8, 2023





## Malaysia

Country Rank

27 / 54

SAVV SC rank: 27

Population: 30,073,353 2020

GDP: 313

R&D/GDP: 1.13

In most years since 2011, Malaysia ranked in the high 20s on the SC. According to Ganesh Kishore, CEO of the Malaysian Life Sciences Capital Fund: “The country continues to actively invest in biotech. The private sector and especially the large-cap private sector is investing in innovation both directly and indirectly—via venture capital firms. Two areas deserve special recognition. One, Sentinext, the vaccine-development company, has

advanced its virus-like particle, or VLP, platform for enteroviruses to the Phase I clinical trial stage. This is a first for a Malaysian company and one of the few companies with a platform VLP technology. Second, the Malaysian Palm Oil Board, in collaboration with U.S.-based Orion Genomics, has made a substantial breakthrough in understanding the mantling phenotype in oil palm. The technology is critical to eliminating off types at early stages of clonal propagation of oil palm.” He adds, “Despite the rapid decline in global commodity prices and the depreciation of the Ringgit against the U.S. dollar, Malaysian leadership continues to invest in life science entities. It is a testament to the level of commitment by the leadership of the country and its business community.

It also acknowledges that the country needs to offer innovation based-value added offerings to be globally competitive.’

**馬來西亞**：是臺灣拓展回教世界生技產業市場的可能跳板。就醫療體系服務而言，臺灣優質之高階健檢與癌症治療對馬來西亞僑胞是非常具有吸引力的。

\*The top-ranked countries in VC availability are [Qatar](#), [Malaysia](#), [Finland](#), [Israel](#), [Singapore](#), and the [United States](#).

Source data from *Scientific American Worldview* (<http://www.saworldview.com>)



2019年3月15日生策會與長庚醫院拜會馬來西亞私立醫院協會會長執行長



受邀參加馬來西亞 BioUsahawan 生技大會，參與 How Technology Transform the agriculture industry 座談會。



# 新南向政策醫衛產業供應鏈工作：

-新南向國家醫衛合作會議/馬來西亞醫療產業拜會-

Oct. 11-14, 2022



APHM(馬來西亞私立醫院協會)



Gleneagles Hospital Kuala Lumpur



Prince Court Medical Centre



Subang Jaya Medical Centre



Pantai Hospital Kuala Lumpur



IHH Healthcare

MET & 台灣醫院 (長庚與高醫)及產業(緯創、研華、永信、永生;友華等)一同拜會馬來西亞私立醫院協會以及重要國際醫療服務的私立醫院集團，協助建立合作橋梁。

# India

Country Rank

49 / 54

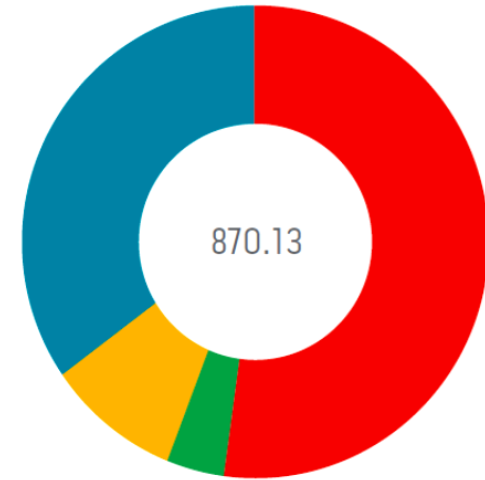
SAVV SC rank: 49

Population: 1,236,344,631 2020

GDP: 1,877

R&D/GDP: 0.82

If effort alone equated with success in biotechnology, India might top the SC and other indices. At the end of 2015, India released a new National Biotechnology Development Strategy, and some of its key goals included generating biotechnology products, increasing bio-manufacturing and producing biofuels. In fact, Shell India Markets plans to build a biofuel plant in Bangalore. Its 13th place ranking on the *Nature Index 2015 Global* suggests that some of India's efforts are paying off. Also, on January 8, 2016, an online article from *Nature Biotechnology* reported: "Most new companies emerging in the GM field are based in the United States and in Asia,



especially India, whereas public developers of the technology are appearing in India and China." Nonetheless, the 2015 BCI described India as facing a "struggling ability to compete," and noted: "India possesses the foundation and potential for becoming a hub of biopharmaceutical innovation—but currently faces several major structural barriers to moving up

from the bottom ranks in biomedical competitiveness. Local executives particularly noted the presence of major regulatory deficiencies and bottlenecks and very limited coverage of medicines, even with costs driven down. In addition, they highlighted major gaps in India's biopharmaceutical IP protection that render the system overall ineffective."



**印度**：在國際產業市場佈局上是不容忽視的人口大國，特別是與人密切相關的健康產業。與印度還算友善的臺灣可仿效日本模式，先投資在人才，再拓展未來廣大的市場。

**India** scored 0.03/10, in *Productivity* which places it 17<sup>th</sup> of the 54 countries studied. India was tied with [Finland](#) and [Ireland](#) and [Taiwan](#).

**India** scored 0.77/10, in *Intensity* which places it 26<sup>th</sup> of the 54 countries studied. India scored ahead of [China](#) and [Austria](#).

Source data from *Scientific American Worldview* (<http://www.saworldview.com>)



2019年5月14日 參加印度經貿訪問團在Bangalore 的招商活動。並參與竹科管理局在 Bangalore 主辦的 Taiwan-India Medical Cooperation Forum.

# 印度理工學院海得拉巴校區

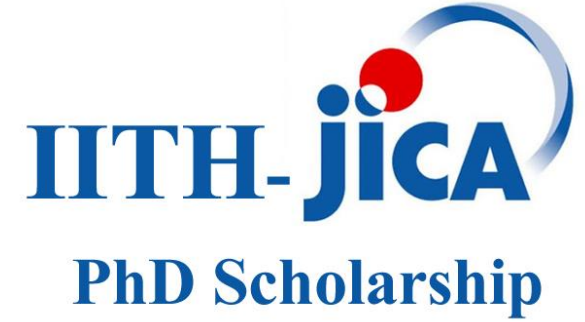
## Indian Institute of Technology

Hyderabad is a public technical and research university located in Sangareddy district, Telangana, India.



भारतीय प्रौद्योगिकी संस्थान हैदराबाद  
Indian Institute of Technology Hyderabad

Japan International Cooperation Agency

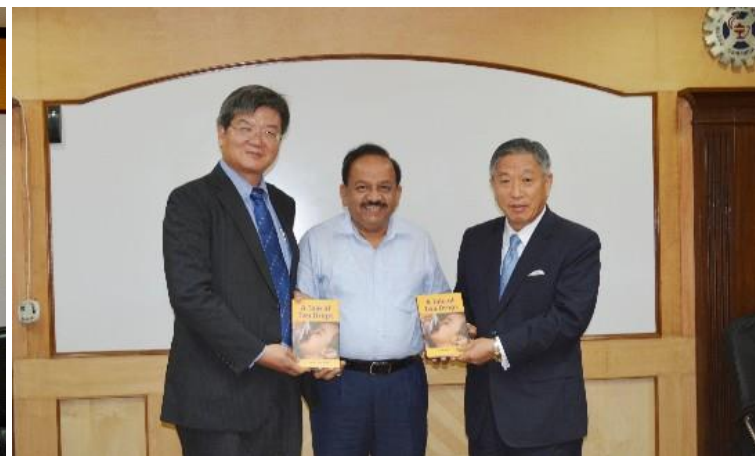
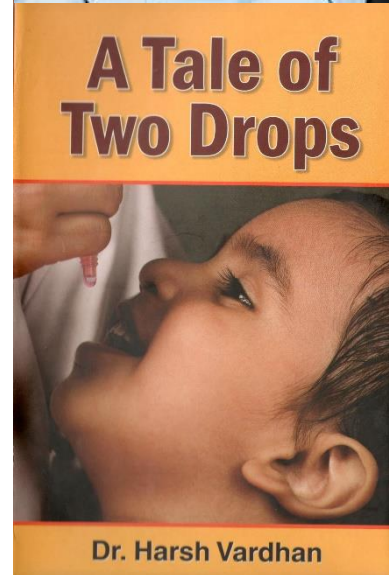


Apple's 1st Campus  
Placement In India

Nov 6, 2017

Dr. Harsh Vardhan is an Indian [Otorhinolaryngologist](#) and the incumbent **Minister of Health and Family Welfare, Minister of Science and Technology** and **Minister of Earth Sciences**.

Dr. Harsh Vardhan was elected to the office of [Chairperson of Executive Board of the World Health Organization](#) from May 22, 2020.



2015-07-20 科技部錢宗良次長及田中光大大使拜會印度科技部長 Hon. Harsh Vardhan。  
Hon. Vardhan部長並於會中致贈著作” A Tale of Two Drops”予錢次長及田大使。





# Dr. Guljit Chaudhri Chief, Managing Director of Innonation, ABLE (Association of Biotechnology Led Enterprises)

Guljit started her career with international business, strategic alliances including joint ventures and domestic marketing of pharmaceuticals.

India: one of the observers of ICH\*.

\*The International Council for Harmonization of Technical Requirements for Pharmaceuticals for Human Use (ICH)



2019-05-17 拜訪 Invest Inida, 邀請 Dr. Guljit Chaudhri 來台 參加 EXPO



2019-12-05 Dr. Guljit Chaudhri 來台參加Taiwan Healthcare EXPO

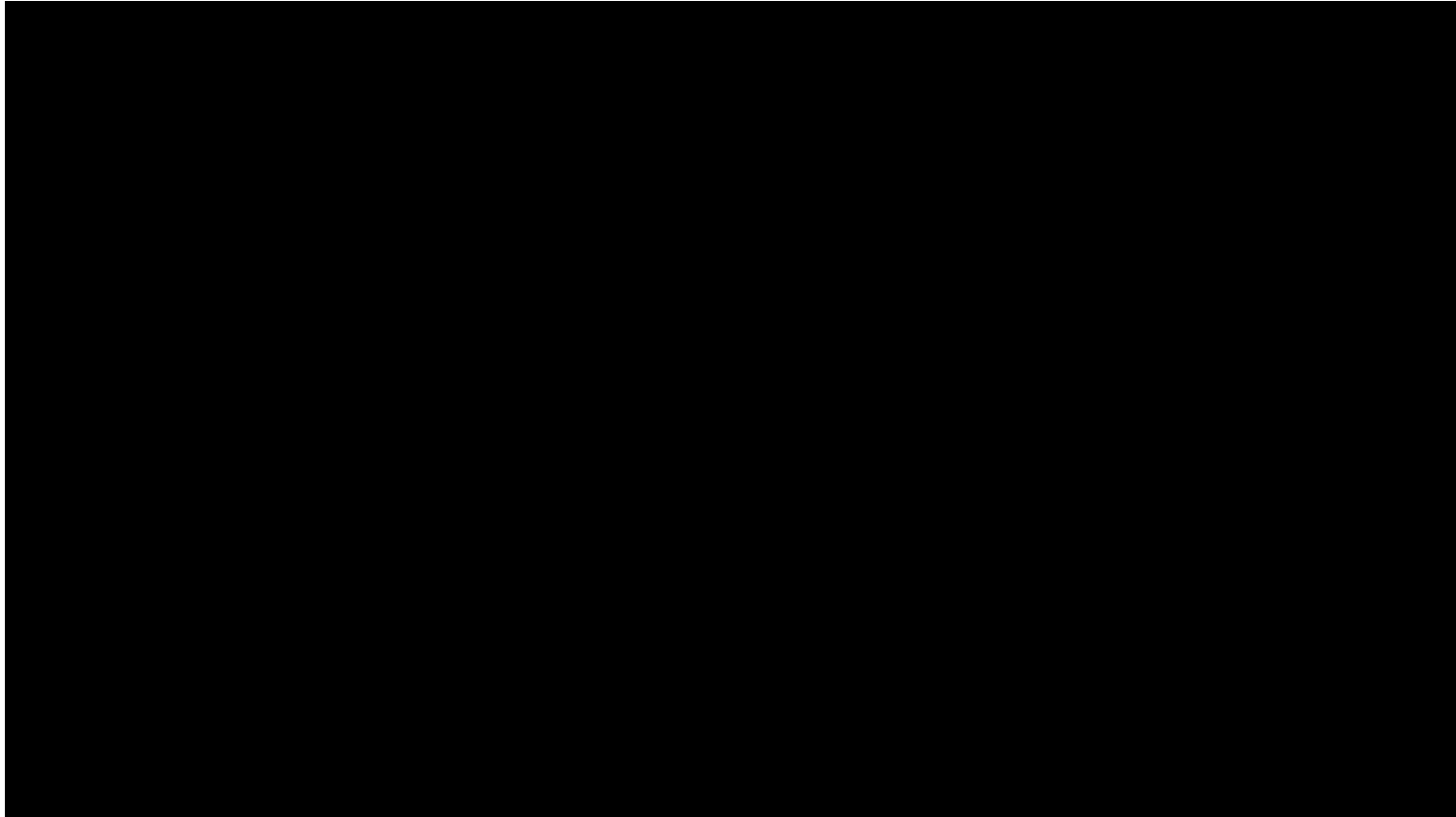
印度在全球仿製藥市場佔據主導地位，2017年/18年度(4-3月)藥品出口規模達到173億美元，包括對美國和歐盟的出口。其中對中國的出口僅佔1%。



2018年7月18日，中國國務院總理李克強就電影《我不是藥神》引發輿論熱議作出批示，要求有關部門加快落實抗癌藥降價保供等相關醫療改革措施。



# Taiwan Healthcare *Bring together & Link together!*



# Create A Global Ecosystem For Healthcare Digital Transformation in Taiwan



## **President Tsai Ing-Wen**

Hospitals play a key role in bringing together the supply chains from the upstream to the downstream. These hospitals can strengthen technology in healthcare and press ahead the overall industry development. Taiwan government will continue its efforts through policy making and the integration of cross-sectoral resources, work hand in hand with the industry to develop precision health for the global market.



## **Mr. You Si-Kun, President of Legislative Yuan / President of the Expo General Assembly 2021**

We at the Expo aim to reinforce the linkage between Taiwan's healthcare and semiconductor sectors, channel them into global strategic alliances to create an ecosystem in which digital technologies could be simply applied in healthcare industry.

## 2022 第六屆台灣醫療科技展

### 科技、醫療、通路戰略結盟 打造全球醫療數位轉型生態圈

台灣醫療科技展以醫療領頭，串聯資通訊、生醫跨界打造產業新格局！

本年度展聚焦智慧醫療、精準醫療、全齡健康三大方向，

匯聚九大領域標竿企業與新科技動能，

不僅擴大吸納全球軟、硬科技產業來台戰略結盟，加速醫療數位轉型，

更延伸政府新南向前瞻布局，攜手東協百大醫療體系建立合作新局！

驅動大健康產業迎來疫後全球醫療採購新商機





## 攜手百家東協醫院，建立智慧醫療場域合作商模



**偕東協6家醫院協會簽署MOU  
加速推動亞太醫療數位轉型**

數位醫療 · 智慧醫院 · 醫療品質 · 臨床試驗 · 國際醫療



- Association of Private Hospital Malaysia
- Philippine Hospital Association
- Private Hospitals Association of the Philippines



- Thailand Private Hospital Association
- National Cardiovascular Center Harapan Kita
- Vietnam Private Hospital Association

## 吸引醫療與產業專業人士、高階決策主管、投資菁英到訪！



產業中高階管理人才  
(e.g. 董事長、C-level、資深經理級...etc.)



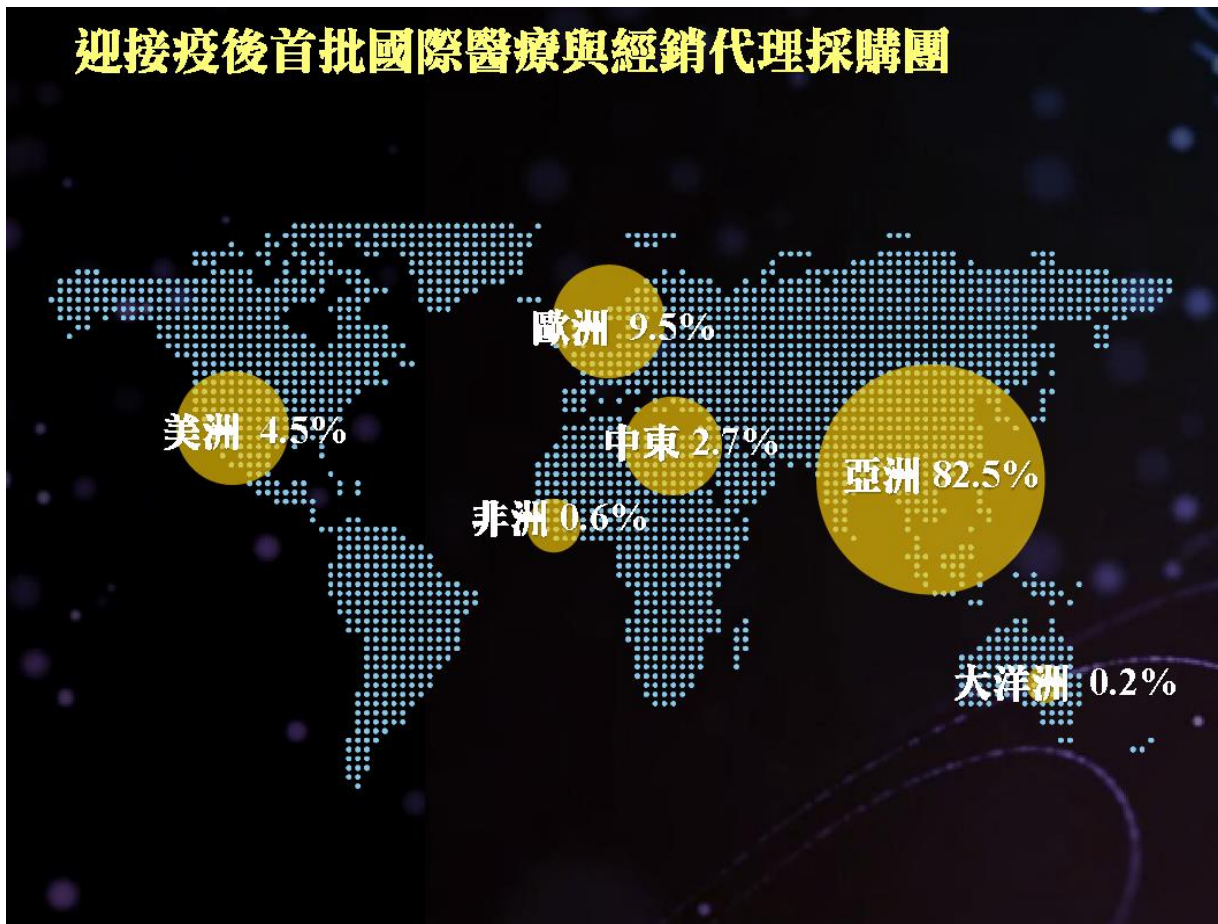
醫院關鍵決策者  
(e.g. 院長、副院長、部長主任級...etc.)



創投/金融/證券機構



## 迎接疫後首批國際醫療與經銷代理採購團



### 指標東協醫院代表：

- Bumrungrad Hospital
- Cardinal Santos Medical Center
- HMI Group
- KMI Healthcare
- Mahachai Hospital chain
- Parkway Pantai Hospitals
- Philippine General Hospital
- Praram 9 Hospital
- Ramkamhaeng Hospital
- Ramsay Sime Darby Health Care
- Shing Mark Hospital
- Sunway Healthcare
- The Medical City

### 指標國際經銷代理：

- 歐洲健康產業經銷代理協會 (GIRP)
- 波蘭醫材商會 (POLMED)
- 匈牙利健康產業供應商會
- 捷克醫療器材供應商協會 (AVDZP)
- 韓國生技產業協會 (Korea BIO)
- 日本藥物授權協會
- 馬來西亞醫藥供應商協會 (MAPS)
- 馬來西亞細胞治療協會 (MACT)
- 泰國工總 (MEDIC)
- 菲律賓醫資協會
- 菲律賓生技聯盟 (BCP)
- 胡志明醫材商會
- 印度生技產業領袖協會 (ABLE)
- BJC Healthcare

亞太最具規模醫療科技產業盛會！  
以醫療領頭！鏈結大健康產業商機首選

立即報名參展！



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Healthcare<sup>®</sup> 2023.11.30-12.3 TaiNEX 1  
EXPO · TAIWAN 台灣醫療科技展

# Branding Taiwan



***Thank you for your attention***





2023

醫療健康產業國際化  
企業經營人才培訓課程

6/3 社團法人國家生技醫療產業策進會  
錢宗良執行長