

The roles and participation of the private sector in the ageing society

International Workshop – Stakeholders Cooperation in
Promoting Active Ageing and Mental Health in ASEAN

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IMPACT THAT
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Speaker



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**Japan Country Leader for International Development and Infrastructure
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Mr. Tsujimoto brings over 20 years of experience as he works closely with International Donor Organizations (IDOs) and governmental agencies to support the private sector developments in emerging markets, including social infrastructure and healthcare sectors throughout the world, most notably in Southeast Asia.

Since 2018, Mr. Tsujimoto has been seconded to Deloitte South East Asia (based in Hanoi) to support various infrastructure investment and development projects in the region.

He is also supporting the introduction of private sector's best practices and experiences in elderly care business in Japan to SEA



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What is the experience from Japan and how could it be applied in the context of SEA?



Key Stakeholders

The Elderly and Their Family Members (Direct Users)



Past

- ✗ Limited services
- ✗ Facility-based
- ✗ Inefficient human resources

Today

- ✓ Based on users' needs
- ✓ Family & Home-based
- ✓ High quality elderly care

The Society / Community



- ✗ 'Burden'
- ✗ Wrong perception
- ✗ Low social recognition of caregivers

- ✓ Elderly care market
- ✓ High-job creation
- ✓ New business development











The Government



- ✗ Lack of resources
- ✗ Rising medical expenditure

- ✓ Accessible elderly care services
- ✓ Statutory elderly care insurance
- ✓ Cost-saving effect

Comparison between selected ASEAN countries and Japan

Areas of Comparison	 Japan	 Vietnam	 Philippines
 Functional recovery support	Central concept Various services ✓	Low awareness, Limited services	Low awareness, Limited services
 Burden on Family support	Mitigated with care service, Suitable care ✓	Large burden, Sometimes Improper care	Large burden, Sometimes Improper care
 Dementia care	Treated and cared as a disease ✓	Low awareness as a disease	Low awareness as a disease
 Cooperation with medical care	Strong ✓	Limited	Limited
 Human resources	Elderly care specialists ✓	No specialist in elderly care facilities	Caregivers for overseas, Not for the elderly care
 Facility & equipment	Standardized quality, Designed for the elderly ✓	Not standardized, Not suitable design	Not standardized, Not suitable design
 Role of ICT	Utilized in record-keeping, monitoring and care ✓	Limited	Limited

Barriers to entry

- ① Under-developed legal system
- ② Elderly-care is 100% user-borne
- ③ Lack of business standards
- ④ Scarce human resources
- ⑤ Lack of social recognition

Possible Solutions

- ① Responsible departments
- ② Partially covered by SI and / or Tax
- ③ Regulate elderly care businesses
- ④ Training and qualifications
- ⑤ Socially shared values

How is Deloitte helping various stakeholders in shaping suitable solutions for the elders?



Deloitte has extensive experience in healthcare sector

Trust of international organizations coupled with in-depth solutions in life science, healthcare and elderly care is testament of our ability to deliver

<p>Deloitte.</p>  <p>Conducted an information collection survey about aging society in Sri Lanka for future bilateral cooperations (2020)</p> <p>Government</p>	<p>Deloitte.</p>  <p>Undertook a business feasibility study funded by the Japanese government to introduce Japanese elderly care business to Vietnam (2018)</p> <p>Elderly care</p>	<p>Deloitte.</p>  <p>Developed a health and welfare plan for elders and long-term care insurance business plan (2019)</p> <p>Elderly care</p>	<p>Deloitte.</p>  <p>Developed a master plan for Aichi Pref. "Orange Town Plan," a dementia friendly community (2018)</p> <p>Elderly care</p>	<p>Deloitte.</p>  <p>Basic survey about role of healthcare industry in Clark Green City, the Philippines (2017)</p> <p>Healthcare</p>
<p>Deloitte.</p>  <p>Undertook a business feasibility study funded by the Japanese government to introduce Japanese elderly care to the Philippines (2017)</p> <p>Elderly care</p>	<p>Deloitte.</p>  <p>Undertook an empirical survey on effectiveness of elderly care support robots (2018)</p> <p>Elderly care</p>	<p>Deloitte.</p>  <p>Undertook a business feasibility study for "Africa Health and Wellbeing Initiative" (2019)</p> <p>Healthcare</p>	<p>Deloitte.</p>  <p>Various services to support Fullerton Healthcare to acquire several hospitals, and healthcare companies</p> <p>Healthcare</p>	<p>Deloitte.</p>  <p>Provided services and support in connection with investment into West Point hospital Ptd Ltd</p> <p>Hospital</p>



About Deloitte

About Deloitte APAC, Deloitte SEA and Deloitte Vietnam

Among 60,000+ professionals in Asia Pacific, 3,000+ are in Life Science & Healthcare team



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