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Abstract The focus of countries is currently aimed at ensuring high-quality medical 4 care and optimizing the cost of its provision. The last decades were characterized by 5 rapid progress in the introduction of new technologies, many of which are capable of 6 significantly improve the prognosis regarding serious illnesses. Healthcare organi-7 zations are seriously considering how to evaluate the effectiveness of the introduc-8 tion of new technologies and how to correctly correlate it with the cost treatment and 9 optimize costs within the health care system. This article analyzes modern trends in 10 the field of healthcare, such as value-based medicine, personalized, and value-11 oriented. Within this framework, the authors make an overview of the current state 12 of digitalization of healthcare not only in the Russian Federation but also in the 13 world arena. The key factors in the development of digital healthcare are discussed, 14 as well as the risks in the implementation of digital solutions.

Keywords Healthcare · Digital technologies · Value-based medicine

1 Introduction

At the present stage of the development of society, the main goal in the field of 18 public health is not just an increase in life expectancy but an extension of a high-19 quality and healthy life. The problem of preserving and strengthening the health of 20 the population has been declared one of the priority directions of the socio-economic 21 policy of Russia. That is why the most important strategic direction of the socio-22 economic development of Russia as a whole is the preservation and augmentation of 23 human capital, which cannot be imagined without improving the health care 24

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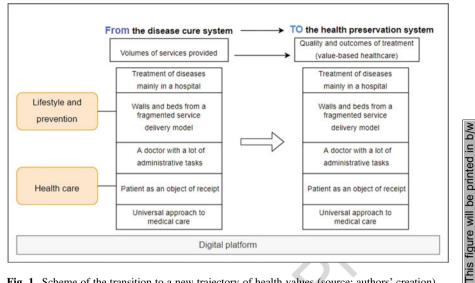


Fig. 1 Scheme of the transition to a new trajectory of health values (source: authors' creation)

system—pinions (Maydanova & Ilin, 2019). According to the definition of the 25 World Health Organization (WHO), health is a collection of all organizations, 26 institutions, and resources, the main goal of which is to improve health. 27

Creating a truly modern a health system that would correspond to the highest 28 international standards implies an improvement in both the quality and accessibility 29 of medical care, which in the context of tense financial situation, large area, limited 30 resources and changing demographic situation requires new technological solutions 31 (Wong, 2015). Most of the developed countries of the world, like Russia, see a way 32 out only in the further technologization of all processes of providing medical help. In 33 modern conditions of the dominance of information technology (IT), target the state 34 of the industry is called "digital medicine" and "digital health." 35

The structure and level of morbidity are the most important components of a 36 comprehensive, integrated assessment of the health of the population. Its study is 37 necessary to substantiate management decisions at the federal, regional, and munic-38 ipal levels of healthcare management. Only on its basis is it possible to correctly 30 plan, predict the development of a network of healthcare institutions, its needs for 40 various types of resources, including information technology (Ilin et al., 2019) 41 (Fig. 1). 42

The main prerequisites for the development of digital health are (Karpov et al., 43 44 2019):

Scientific and technological progress-advances in the development of science 45 and technology in medicine, molecular biology, computer science, and an 46 increase in computing power. New effective methods and tools diagnosis and 47 treatment. 48

- Global informatization and mobility—people are no longer limited by geographic 49 barriers in communication; they are actively using the Internet, mobile devices, 50 social networks, and communication apps at a convenient time.
- Patient-centered—modern a person leads a healthy lifestyle, but how the patient 52 makes decisions on voluntary health monitoring, actively participates in the 53 collection of data, familiarization with information resources, selects the attend- 54 ing physician and treatment strategies. 55
- Data centricity—an abundance of data on the health status of citizens, on the basis 56 of which analytical tools are created for decisión-making. 57

A number of factors can be identified that affect the speedy transfer of medicine to 58 a digital format—these are huge distances, a highly educated population, a large 59 number of small settlements where primary health care is provided by Feldshermidwife stations or with the involvement of households. 61

Below in the article, the authors describe in detail the key trends in health care 62 development, development factors and the main risks that medical institutions face. 63

2 Modern Trends in Healthcare Development

Technologies of the future, special attention of people to their health, scientific 65 research and discoveries—all this sets trends in the development of the industry. 66 Among them, there are several main directions in which the health care of the future 67 will move (10 technologies, etc.). One way or another, each of them is aimed at 68 improving the lives of patients and facilitating the work of the doctor (Fig. 2). 69

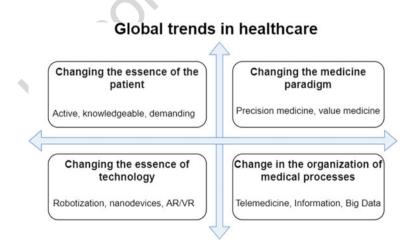


Fig. 2 Global trends in healthcare (source: authors' creation)

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70 2.1 Digitalization

71 Digital technologies are laying the foundation for increasing the efficiency of health 72 systems, expanding the ability to track health indicators, and improving the quality 73 and safety of treatment through the use of artificial intelligence and personalized 74 medicine (Mitchell & Kan, 2018).

The market for digital technologies in healthcare is growing by a quarter every year. According to Global Market Insight, its volume will reach \$116 billion by 2024. The rapid growth rates are due to active support from the states, because digitalization can help to reduce health care costs in general significantly.

Today in medicine, developments related to artificial intelligence are most in demand. AI is actively used in diagnostics, drawing up a personal treatment plan and selecting the optimal formula for drugs (Iliashenko et al., 2019).

The Internet of Medical Things (IoMT) is also in demand—various devices with the function of exchanging data over a global network. They are mainly used for patient monitoring. According to experts, by 2020, about 30 billion IoMT devices will be used in the world (Dilawar et al., 2020).

Telemedicine also belongs to digitalization. Despite the fact that it is no longer something innovative, this trend is not slowing down. There are still many areas in the world where medical care remains difficult to access. Video and audio chats with doctors are still the most popular telemedicine technology.

90 2.2 Patient Centricity

91 At the head of this model is not a medical institution and individual doctors, but the 92 needs of the patient, the quality of his treatment, the comfort of his stay and the 93 achievement of specific goals of his treatment. In fact, this is a separate area of health 94 care development. In it, the patient is a fully valuable personality in whom it is 95 important to see not only the state of health but also psychological and social 96 characteristics.

Personalized medicine is, first of all, integral medicine, which includes the
development of personalized treatments, testing for disease susceptibility, prevention, as well as combining diagnostics with treatment and monitoring of treatment
(Vogenberg et al., 2019).

101 Communication occupies a special place in this model. Patients pay special 102 attention to how health workers communicate with them, and on the basis of this, 103 they assess the activities of the institution and the health care system as a whole. The 104 patient becomes more and more an active participant in the treatment process, having 105 the greatest interest in the result.

106 The basic principles of personalized medicine (Translational 7P medicine) 107 include (Ishikawa, 2020):

_	Ability to "predict" the disease (predictiveness).	108
_	Taking specific measures to prevent the disease (prevention).	109
_	Individual treatment of each (personalization).	110
_	Training of new personnel for health care through transdisciplinary medical	111
	education (providing).	112
_	The possibility of direct participation of the patient himself in the process of	113
	prevention and treatment (participation).	114
_	The ability to conduct interdisciplinary research on the distant horizon	115
	(proactive).	116
_	The possibility of forming the evolution of the patient's contact with medicine not	117
	only in the hospital but also outside it (point of patient care).	118

2.3 Datacentricity

119

The active digitalization of medicine has led to the availability of huge data on 120 patients, specific cases of diseases and treatment histories. Thus, it is predicted that 121 by 2025 the volume of medical data will be 1 ze-tabyte (trillion gigabytes). The 122 presence of such a large amount of data provides a good basis for the analysis and 123 output of statistics. Big Data will make it possible to make informed decisions both 124 on the choice of the most effective methods of diagnostics and treatment of a 125 particular patient and for the preparation of medical forecasts and the method of 126 organizing care in general (Povorina & Kosinova, 2020).

Tech giants Microsoft, Amazon, Google, and Salesforce are trying to cement their 128 place in the trillion-dollar market. Improving the use of electronic health records is 129 considered a priority, as research has shown that doctors spend more time taking 130 medical records than working with patients. Cloud service Google Cloud already 131 generates Google \$8 billion in revenue per year. Clients of Google Cloud include the 132 private medical and research center Mayo Clinic, pharmaceutical company 133 McKesson and insurance company Kaiser Permanente. 134

2.4 Values-Oriented Healthcare

This concept was originally proposed by the American economist Harvard Business 136 School professor Michael Porter (Musina et al., 2020). The model is based on the 137 focus on the values of patients, their expectations from the health care system. 138 Further allocation of resources is carried out in accordance with the results obtained 139 by the institutions of the health care system with the use of drugs or technologies. 140 The model is based on the focus on the values of patients, their expectations from the 141 health care system. Further allocation of resources is carried out in accordance with 142 the results obtained by health care institutions using drugs or technologies. 143

The difference between classical health care systems is that in the traditional system, more attention is paid to planning, control and payment of processes and volumes of medical care. The value-based model determines the amount of payment for medical services, based on the results of treatment, the quality of life of patients and the level of satisfaction of their needs.

Value-Based Healthcare is based on six pillars and is about improving patient outcomes while optimizing costs for the healthcare system (Achieving value-based health):

152 1. Organization of integrated medical care for each nosology.

- 153 2. Monitoring outcomes and costs at the individual level.
- 154 3. Development of batch payments for the treatment cycle.
- 155 4. Interdisciplinary system of medical care.
- 156 5. Expansion of geographical coverage.
- 157 6. Development of an IT platform to support the health care delivery system and
- record results.
- 159 As part of a value-based approach to healthcare, practices such as:
- 160 1. Providing a "second opinion" and supporting informed decision-making by thepatient.
- 162 2. Diagnostics and prevention of conditions preceding the disease.
- 163 3. The use of information technology for the accumulation of data about the patient164 and further monitoring of the state of health.
- 165 4. The use of telemedicine as an auxiliary tool to support the patient's health.
- 166 5. Measurement of satisfaction and analysis of patient needs.

167 In those countries where a value-based health model is already being 168 implemented, studies have been carried out which have shown that the use of this 169 approach allows (Shlyakhto & Conradi, 2019):

170 1. Reduce the number of planned and emergency hospitalizations to 20%.

- 171 2. Reduce the costs of the health care system by 6-15%.
- 172 3. Improve the quality of life of patients.

173 If we talk about Russia, the transition to value-based health care will require 174 significant reorganization and restructuring of the functioning system. However, in 175 my opinion, this model is the best way to improve the quality of medical care.

- 176 Speaking about the factors of health care development, one can single out:
- 177 Increase in life expectancy
- 178 Prolongation of a quality and healthy life

For the high-quality use of modern solutions in the field of health care, it is necessary to focus on three main points:

- 181 High-quality data collection.
- 182 Deep analytics of the received data.
- 183 Integration of information systems and received data into a single digital circuit.

Effective digitalization of the healthcare system is built on the basis of a platform 184 that unites all participants in the system into a single circuit. The cornerstone of the 185 platform is the creation and development of digital twins (patient, doctor, medical 186 organization). In addition, the creation of a single digital circuit will increase the 187 efficiency of management, the accuracy of statistics and the quality of medical 188 care—the data will make it possible to analyze in detail the incidence on a national 189 scale (Shlyakhto et al., 2020).

For its creation in the period from 2019 to 2024, 177.7 billion rubles were 191 allocated in the federal budget of the Russian Federation. The digital contour is, 192 first of all, the regulation of business processes, a tool for effective interaction 193 between participants in the healthcare system.

3 Digital Transformation of Healthcare: Global Experience, Key Factors, Difficulties

195 196

The widespread introduction of digital technologies, in turn, solves several important 197 problems at once that have held back the growth of the market: 198

- Information about new goods and services, new technologies in the field of 199 healthcare is easier and faster to reach the consumer.
 200
- Information about the patient, his medical history becomes more accessible to 201 doctors. This simplifies the diagnosis, reduces the risk of errors, speeds up the 202 exchange of information between medical institutions.
- Mobile digital technologies simplify health monitoring, make complex wearable 204 devices more accessible, such as, for example, heart monitors. 205
- The use of digital technologies makes it possible to develop new drugs more 206 efficiently, faster and cheaper.
- Blockchain technologies reduce the risks of counterfeiting medical and biologically active drugs (Moosavi et al., 2017).

Medical organizations are already converting information into digital format, 210 business processes are being automated, and centralized systems are being created 211 in all subjects. The use of information technologies is aimed, among other things, at 212 improving the quality of medical care provided through the latest diagnostic and 213 treatment methods, systems for interpreting the results of medical research. All this 214 should lead to a reduction in the number of medical errors, a decrease in the time 215 spent waiting for medical assistance, and an increase in the effectiveness of 216 treatment. 217

218 3.1 World Experience

219 Strategic geographic location, combined with a modern IT infrastructure and a 220 favorable climate for innovation, creates all the necessary conditions for the accel-221 erated development of digital health in Southeast Asia. Therefore, in this part of the 222 article, we will present the world experience from these countries.

223 South Korea Experience

Using the example of South Korea, one can see a clear plan for the development of digital vision in the health sector.

South Korea's health care system is regulated by the Ministry of Health and Welfare (MoHW) and funded by the Compulsory Health Insurance System (NHIS), which covers 97% of the population. There are about 70,000 medical institutions in Korea, of which almost half are located in Seoul and the Gyeonggi province surrounding the capital, which explains the predominance of the national health industry in Seoul.

To combat rising costs, the government is implementing various measures aimed at developing the digital health industry. These include increased investment in the development of new technologies and improved regulatory policies for digital health products and services (Digital Health South Korea Market Intelligence Report).

The digital health ecosystem is made up of government agencies, regulators, industry associations, healthcare centers, large corporations, blockchain-based healthcare providers, and a range of startups. Key players in digital health include leading clinics such as the National University Clinic and Asan Medical Center, large conglomerates such as Samsung and LG Electronics, telecom providers (SK Telecom and KT), system integrators (LG CNS, SK CNC) as well as startups (H3Systems, Lunit and Insung) (Fig. 3).

Korea's well-developed ICT infrastructure serves as the foundation for digital healthcare, with the adoption rate of electronic health records (EMR) systems in Korea reaching 93.6% in 2017 in hospitals. Wide coverage is associated with universal digitization of patient data, digital storage of clinical images, electronic databases of hospital administrations and increased use of remote sensing technologies.

South Korea leads the world in terms of smartphone ownership (94% of adults own smartphones and use the Internet). This high penetration rate of smartphones makes it possible to integrate the use of wearable devices quickly.

Korea's largest consumer electronics giants—Samsung Electronics and LG Electronics—are investing heavily in medical applications and wearable devices such as the S Health app and smartwatches. In addition, SK Telecom and Seoul National University Hospital have formed a joint venture Health Connect, which develops mobile solutions. For hospital management and diabetes management in Korea, also intended for the market China. Products in the mobile consumer health market



Fig. 3 South Korea's digital healthcare ecosystem (source: IntraLink Ltd, 2021)

include wearable devices such as sweat rate sensors in the form of watches, patches 258 for non-invasive blood glucose monitoring and painless drug delivery, biosensor 259 smart contact lenses capable of measuring glucose levels in diabetic patients. Insulin 260 delivery systems These include functions such as drug dosage control, glucose 261 monitoring and emergency signaling. 262

Singapore Experience

The strategic geographic location, combined with a modern IT infrastructure and a 264 favorable climate for innovation, creates the necessary conditions in Singapore for 265 the accelerated development of digital health in this country in the Asia-Pacific 266 region. 267

The country's health care system is designed to provide everyone with timely, 268 cost-effective and unimpeded access to various levels of health care. The Singapore 269 government controls and finances the bulk of the healthcare system; more than 80% 270 of the hospital fund in Singapore is concentrated in government clinics, government 271 subsidies shape patient and provider decisions and affect pricing (Digital health 272 ecosystem in Singapore). 273

Singapore's health financing structure is structured around the "three Ms:" 274 Medisave, Medishield and Medifund (Fig. 4). 275

Medisave—is a mandatory health savings account; each employee contributes 276 from 8% to 10.5% of their monthly salary (depending on age group) to a personal 277

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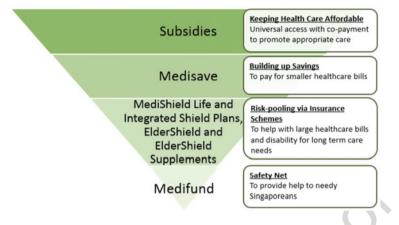


Fig. 4 The structure of the public health insurance system in Singapore (Source: https://ec.europa.eu/health/sites/default/files/ehealth/docs/ev_20180515_co23_en.pdf)

278 Medisave account. Patients can only use their Medisave accounts to buy
279 pre-approved drugs, and the government subsidizes many medical bills directly.
280 Medishield—is a nationwide emergency insurance program with higher deductibles.
281 Medifund, \$3 billion fund, helps citizens who cannot afford medical care through
282 Medishield and Medisave tools.

The National Electronic Health Record (NEHR) is the backbone of digital healthcare in Singapore and is used by over 14,000 doctors in 280 healthcare facilities.

The main features of NEHR include (Fig. 5):

287 – A system for the exchange of patient data throughout the national health network.

288 - Management of the patient's medical record, collection of clinically significant

information based on the results of contacts with medical workers throughout life.

- Ensuring secure access to the patient's medical record by authorized clinicians
 and healthcare professionals.
- Ensuring greater coordination and informed decision-making, supporting more
 accurate diagnosis, better treatment and comprehensive patient-centered care.

Singapore's policy to expand the use of mHealth wearable digital devices focuses on the following main objectives:

- Health promotion and disease prevention—related programs are based on SMS
 notifications.
- Diagnostics—used for ophthalmological examinations, as well as in the field of
 dermatology and stroke.
- 300 Treatment—providing patients with recommendations for rehabilitation.
- 301 Monitoring—allows you to monitor chronic diseases.
- 302 Support of medical services-registration for an appointment for full-time visits
- 303 to specialists.





China Experience

The concept of telemedicine is relatively new in China, although the first applica-305 tions of these technologies in the country began in the 1980s. As in many countries, 306 the outbreak of COVID-19 has changed approaches to digitalizing healthcare, 307 especially in the area of telemedicine. China currently has over 1000 telemedicine 308 technology companies, and the growth is expected to continue exponentially. The 309 PRC government and digital health service providers are united by a common 310 goal—to accelerate the development of telemedicine technologies in the country 311 (Li et al., 2020).

Despite the fact that the size of the Chinese healthcare market is the second largest 313 in the world after the USA, the country's healthcare system is faced with many 314 problems, including complex relations between doctors and patients, lack of access 315 to services in rural areas, high costs, and poor quality of medical services, slow and 316 inefficient hospital operations. 317

As in many other countries, telemedicine in China faces challenges such as 318 current government regulatory policies that need to be improved and potential 319 cybersecurity threats. In Ki-tai, doctors cannot establish an initial diagnosis or 320 prescribe treatment using a digital platform; during a session, the patient receives 321 only consultations. But the regulatory enactments in China have been improving 322

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lately. Digital healthcare platforms must strictly adhere to government requirements,especially in terms of data security, to prevent and limit emerging threats.

The COVID-19 outbreak has been a catalyst for the widespread adoption of 325 online telemedicine consultation. The Chinese government quickly took steps to 326 create conditions for medical institutions to cooperate with private companies (Ping 327 An Good Doctor). China sees the rise of digital health as an opportunity to fix the 328 imperfect aspects of the country's health care system. Given that the growing 329 population of a country with a general tendency to increase life expectancy is 330 looking for new ways to access health services, telemedicine in China will continue 331 to develop rapidly. This process is also associated with the development of a 332 communication network, especially in remote areas of China. 333

334 Russia Experience

In the Decree of the President of the Russian Federation "On the national development goals of the Russian Federation for the period up to 2030" one of the priority directions of the country's development is the digital transformation associated with achievement of "digital maturity" of key sectors of the economy and social sphere, including number of health care. The task has been set to increase the share of mass socially significant services available in the electronic form to 95% (Izmailova et al., 2021).

The national priority project "Healthcare" defines the digitalization of the healthcare system of the Russian Federation as one of the key tasks, which is being implemented within the framework of the federal project "Creation of a single digital health care circuit based on the Unified State Health Information System."

Within the framework of this federal project, it is necessary to solve the tasks of transforming the country's healthcare system through automated information support, as well as monitoring and analyzing the use of healthcare resources and providing medical care to citizens.

The main patient-oriented service that provides a wide range of services to citizens is the My Health super service (Healthcare in Russia). Currently, it is possible for citizens:

Making an appointment with a doctor and for undergoing medical examination
 and professional examination.

355 - Attachment to a medical organization; filing an application for the choice of an

- insurance medical organization.
- 357 Obtaining information about the provided medical services and their cost.

The "road map" of the service also provides for citizens' access to medical documents in electronic form. Available in 2020:

360 – Medical certificate of admission to driving a vehicle.

361 – Referral for hospitalization, rehabilitation treatment, examination, consultation.

- Medical record of a patient receiving medical care on an outpatient basis.
 362
- Medical professional advisory opinion.

The super service "My Health" will have electronic prescriptions, which will 364 become a key element of the federal register of preferential drug provision, which 365 allows you to keep track of, analyze, plan, and provide for the needs of the 366 population in drugs. 367

Also, projects of the Ministry of Health of Russia in the field of digital health 368 include: 369

- Introduction of a system of mandatory labeling of medicinal products from July 370 1, 2020.
 371
- The launch of the federal register of preferential drug provision from January 372 1, 2021.
 373
- Development of a network of national medical research centers (NMRC) and the 374 introduction of innovative medical technologies, which includes the introduction 375 of specialized vertically integrated medical information systems for individual 376 profiles of medical care: oncology, cardiology, etc.; development of telemedicine 377 technologies.

3.2 Key Factors in the Health Care Development

If we talk about the impact on the health indicators of mankind, there are four main 380 factors of influence: 381 Lifestyle and prevention 382 - Medical assistance (quality, availability) 383 Socio-economic factors 384 Environment 385 The main trends in the digitalization of healthcare are: 386 - Improvement of the regulatory framework. 387 - Setting the task of using digitalization for strategic management of the industry. 388 - Coming into the sphere of the country's leading IT companies. 389 - Increasing the importance of information security issues in health care. 390 - The formation of tasks for the intellectualization of management and the treat-391 ment process from public policy, the functioning of an institution to diagnosis and 392 treatment. 393

379

394 3.3 The Challenges of Digital Healthcare Transformation

The research of the main trends in the development of digitalization of healthcare at the global and local levels showed that global technological progress provides medicine with various hardware and software tools that facilitate the work of specialists and reduce the cost of providing medical care. However, despite serious positive transformations in the field of digitalization of healthcare, for the full implementation of this practice throughout the Russian Federation, it is necessary to overcome a number of obstacles:

- 402 Lack of financial resources
- 403 Lack of personnel in specialties, ensuring the transformation of digitalization of 404 medicine
- 405 Underdeveloped digital health infrastructure
- 406 Threats to information security
- 407 Low level of development of intelligence of expert medical systems

Thus, the digitalization of healthcare is considered by the highest state power in Russia as one of the priorities for its development, which, however, requires additional and careful management work to make specific decisions. Nevertheless, positive trends and innovations are obvious, which will move from the category of experimental innovations and will be introduced into the healthcare sector for its normal functioning during the period of digital transformation of attributes.

414 **4** Conclusion

Healthcare today is undergoing an incredible digital transformation that is changing virtually every aspect of the industry. It is obvious that in the coming years, this sector will constantly develop, including through the emergence and implementation of new technologies. In this regard, cooperation between major market players and startups is very important. And here, not only the financial component plays a role, but also the mentoring of industry experts who help bring innovation to life.

The digital transformation strategy of Russian healthcare is aimed, first of all, at 421 creating conditions for increasing the efficiency of activities in the provision of 422 medical services through the introduction of digital technologies. Optimization of 423 the development of digital transformation is carried out by ensuring equal access to 424 425 the Internet and cellular communications of the population of the country, reengineering of public services and services for receiving medical services, taking 426 into account the possibilities of digital technologies, development, and implemen-427 tation of industry platforms. Changes at the national level, creating a single space for 428 the exchange of medical data of patients at all stages of service provision, modern-429 430 izing the unified state information system in the field of health care (hereinafter referred to as the Unified State Health Information System) to create the possibility 431

of quick access to primary health care, increasing high-speed information exchange 432 in medical organizations. 433

Within the framework of this article, the authors made an overview of the current 434 state of digitalization of healthcare not only in the Russian Federation but also in the 435 world arena. The key factors in the development of digital healthcare were given, the 436 risks in the implementation of digital solutions were analyzed. 437

In the future, it is planned to implement the concept of a single digital circuit for a 438 large geographically distributed medical organization. 439

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