

APACMed @ World Expo 2025

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Addressing Workforce Crunch Through
Innovative Technologies



GOVERNMENT AFFAIRS AND POLICY

By 2040, Japan is projected to face a shortage of 1 million medical workers, posing a significant threat to healthcare delivery. This challenge is compounded by new government regulations on overwork, limiting available labour hours. Despite the urgent need for solutions, many hospitals lack the capital and resources to invest in technology and equipment to bridge workforce gaps. Without substantial capital investment and policy reforms, maintaining care standards and system resilience will become increasingly unsustainable.

APACMed was a content partner of Japan Health, organizing the APACMed Conference Day. Japan Health is part of the Osaka Expo's Health and Wellbeing Week, bringing together an audience from hospitals, central procurement agencies, governments, and medical insurance councils. As part of our mission to spark discussion around how automation and digital technologies can address the impending manpower shortage in Japan's healthcare system and provide members valuable opportunities to showcase their solutions, we organised a panel discussion bringing together government, industry and academia.



Vice Minister Sakoi Masami from Japan's Ministry of Health, Labour and Welfare, joined by leaders from Samsung Medical Center, Philips, Siemens Healthineers, Solventum, Kwansei Gakuin University and Bain & Company, took the stage to discuss how MedTech can help solve one of the region's biggest healthcare challenges: workforce shortages.



1.

Specific Challenges in Japan's Healthcare Ecosystem

- 1.1 Provider perspective
- 1.2 Government/reimbursement perspective

2.

Harnessing Innovative Technologies to Alleviate Manpower Crunch

- 2.1 Provider Support
- 2.2 Treatment Innovations
- 2.3 Workflow Efficiency
- 2.4 Patient Support

3.

Global Best Practices

- 3.1 ROI Drivers for Healthcare Technology
 - cost reduction, efficiency gains, staff productivity and burnout reduction
- 3.2 Global case studies on successful adoption

Key Takeaways

1.

Solid progress in workload improvement, but untapped potential in digitalization.

Regulatory reforms and early digital tools have eased nursing workloads, but Japan still trails best-practice markets (e.g., South Korea) in deploying advanced workforce-supporting technologies.

2.

Financing models matter as much as the tech.

Up-front cap-ex deters adoption; SaaS (software as a service)-style, pay-for-performance models can unlock demand and spread risk between suppliers and provider.

3.

ROI must be tangible – with burnout reduction the headline metric

Demonstrating clear financial returns is essential – Among all data points, the impact on staff burnout resonates most with Japanese hospital executives, particularly datapoints that directly connect efficiency gains with healthcare outcomes.

4.

Structured collaboration is the “how” behind strong ROI

Multi stakeholder collaboration on digital infrastructure, the right financial incentives, and expansion of community based care is important; as is designing clear roles, governance, and support mechanisms to ensure benefits need to be delivered consistently to capture the full potential.

5.

Universal coverage and value-based care must stay in balance

Japan must preserve the benefit of universal coverage while advancing value-based care; mechanisms like Sentei Ryōyō – a scheme under which patients who voluntarily select certain add-on services pay an institution (set surcharge out-of-pocket) can be further leveraged to scale innovative solutions.



Panelists



Masami Sakoi
Vice-minister for Health, Chief
Medical & Global Health Officer,
Ministry of Health, Labour and
Welfare, Japan



Prof. Shusuke Hiragi Institute
of Business and Accounting,
Kwansei Gakuin University



Dr Son Meong Hi
Chief Medical Information Officer,
Samsung Medical Center, South Korea



Dr Sadhana Trivedi
Senior Director of Global
Medical Affairs,
Solventum



Goro Sakura
President and Representative
Director,
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Jasper Westerink
Senior Vice President and Represen-
tative Director, Philips Japan & Acting
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MODERATOR
Iori Ono
Healthcare Associate Partner,
Bain & Company



OPENING
Benish Aslam
Lead, Government Affairs and
Policy & ESG APACMed

Attendees

Hospital administrators and physicians | Ministry of Health, Labour and Welfare Japan | Local and city government officials | Local policy research institutes | Foreign embassy and consulate generals | National research institutes and foundations | Local medical associations | Laboratories | Universities | Medical R&D agencies | Local and global industry players | Consulting firms | Technology incubators

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- Kansai Economic Federation
- Kansai Economic Alliance
- Japan MedTech Association
- Japan Association of Clinical Engineers
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- Osaka Chamber of Commerce and Industry
- Osaka International Convention Center





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Founded in 2014 and headquartered in Singapore, APACMed represents the medical technology industry in Asia Pacific, including manufacturers and suppliers of medical equipment, devices, services and in-vitro diagnostics. Providing a unified voice for the industry, APACMed works proactively with policy makers, regulators, and stakeholders to demonstrate the value of medical technology, promote innovation, and impact policy that advances healthcare access for patients in Asia Pacific. Visit us online at www.apacmed.org