Transforming Healthcare with mHealth Solutions.

mHealth ✠

45% of mHealth APPs users are worried by data privacy and usage of their data

97,000 mHealth apps are currently available

70% target **consumers & fitness**

30% target **health professionals**

By 2017 ...
3,4 billion people will have smartphones
**50% with mHealth APPs**

By 2017, **3.4 billion people** worldwide will own a smartphone

1/2 will use **health apps**

Global Mobile Health Market

According to a new market report published by Transparency Market Research "mHealth Market- Global Industry Analysis, Market Size, Share, Growth, Trends and Forecast, 2012 - 2018," **the global mHealth market is expected to reach USD 10.2 billion by 2018** from USD 1.3 billion in 2012 at a CAGR of 41.5% from 2012 to 2018.

$10.2 billion

2013 2014 2015 2016 2017 2018

global mHealth market
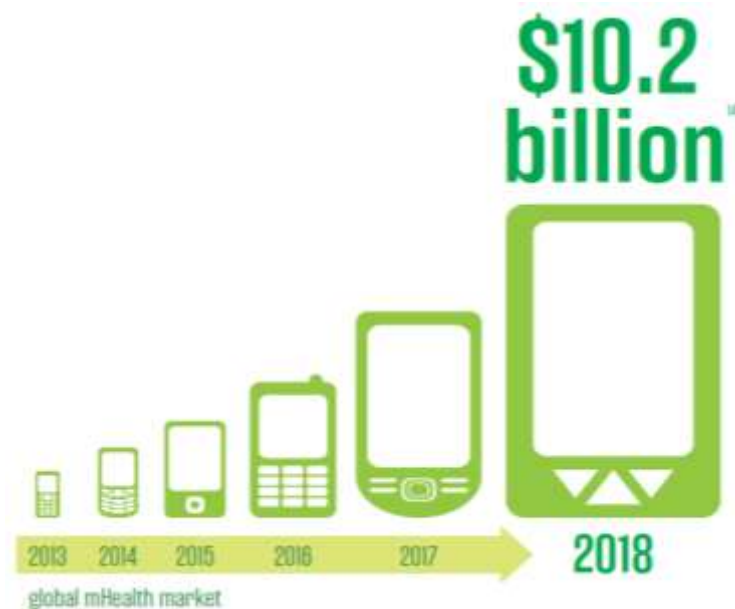
Missing regulations is seen as one of the major barriers for the mHealth market to enter the next market phase: the integrated phase. In this phase, mHealth applications will become an integrated part of doctors' treatment plans.

[http://www.researchandmarkets.com/reports/2603873/mobile_health_trends_and _figures_20132017]

Global Mobile Health Market

Can we really prove that mHealth helps sustainability of the healthcare system?
- Saving time to professionals
- Reducing costs
- Empowering the patient
- Increasing efficiency, Access to information, …

- ……

Good market figures are being foreseen in this segment.
Would these figures incentivate industry?
Would the public admin be willing to play their role?

Socio economic impact of mHealth

June 2013

Executive summary [Pg 2] | Socio-economic impact of mHealth [Pg 6]
Overcoming barriers to adoption [Pg 20] | Appendices [Pg 25]

Socio-economic impact of mHealth
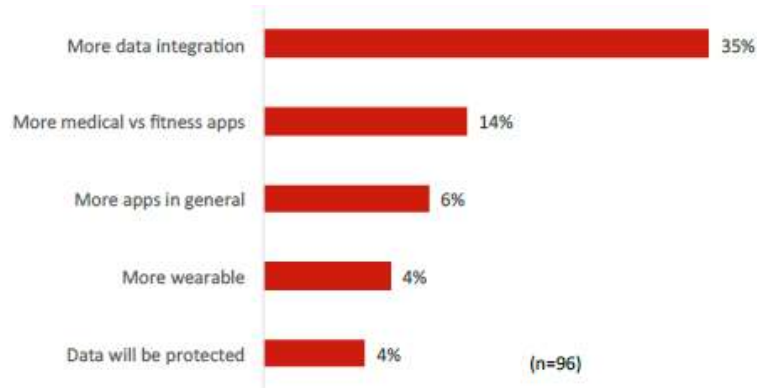An assessment report for the European Union

pwc

mHealth could save 99 billion EUR in healthcare costs in the European Union (EU) and add 93 billion EUR to the EU GDP in 2017 if its adoption is encouraged.
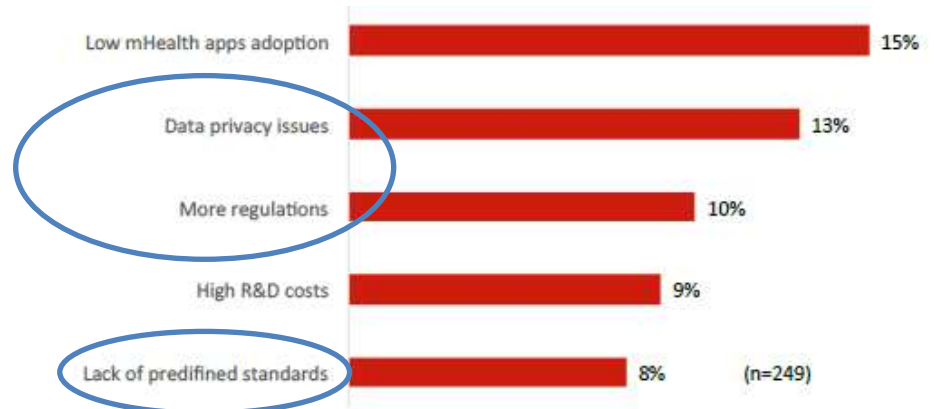
€ 99 bn

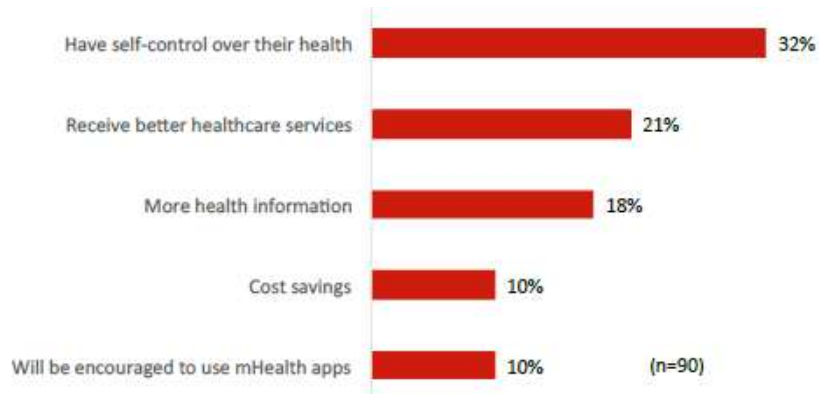**Total healthcare cost savings in 2017**

€ 23 bn — Private savings (23%)

€ 76 bn — Public savings (77%)

€ 93 bn

Total GDP addition in 2017

Source: PwC analysis

Source: Socio economic impact of mHealth • PWC

Top 5 mHealth changes towards 2020

More data integration	35%
More medical vs fitness apps	14%
More apps in general	6%
More wearable	4%
Data will be protected	4%

(n=96)

Biggest barriers for mHealth development

Low mHealth apps adoption	15%
Data privacy issues	13%
More regulations	10%
High R&D costs	9%
Lack of predifined standards	8%

(n=249)

Changes for patients

Have self-control over their health	32%
Receive better healthcare services	21%
More health information	18%
Cost savings	10%
Will be encouraged to use mHealth apps	10%

(n=90)

Changes for doctors and nurses

Learn how to use mHealth apps	27%
More health information	21%
Offer better services	16%
Culture change	10%
Better decision making	8%

(n=91)

Source: own study, conducted in Aug – Sep 2014, total simple size =157, completed responses =99
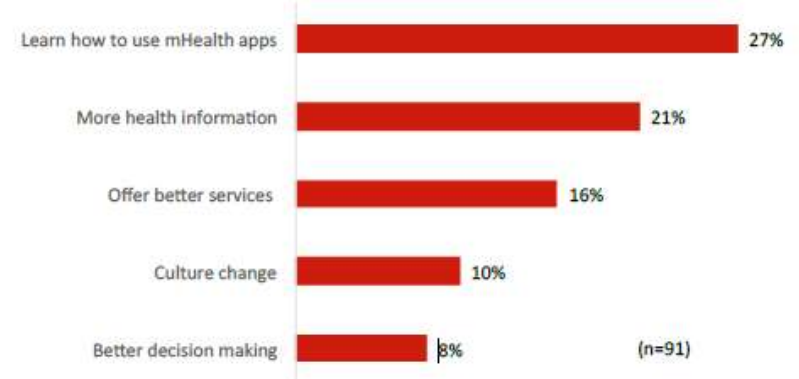
Regulatory, economic, structural and technological adoption barriers are limiting the adoption of mHealth

Flow of information	Regulatory	Economic	Structural	Technological
Healthcare provider	Lack of clarity on mHealth certification	• Need for further evidence • Conflicting incentives • Change management	• Low cohesion across levels and regions • Low competition	• Late involvement of doctors in solution design
Solution vendor		• Inadequate funding • Scalability issues	• Hindrances to scalability	• Interoperability
Mobile service provider	Lack of interoperability standards	• Lack of reimbursement mechanisms		• Standardisation • Interoperability
Medical device vendor	Lack of compensation mechanisms			• Standardisation • Interoperability
Doctors / Patients		• Lack of awareness of mHealth benefits		• Significant training needs

Barrier	Mitigation measure		Key Actor
Regulatory	Integration of mobile health into healthcare strategy		• **Regulator** • **Government** • **Ministry of Health**
	Stakeholder accountability framework		
	Clarity on regulations for medical devices		

BARCELONA, INSPIRING ENTREPRENEURSHIP & INNOVATION

TALENT & KNOWLEDGE

- **20%** of Spain's ICT sector, with 110,000 ICT professionals.
- **12** public/private universities & 5 top business schools.
- **8** internationally recognized scientific facilities.
- Over **47,000** employees dedicated to research and development.
- **4 ICT** research centres.
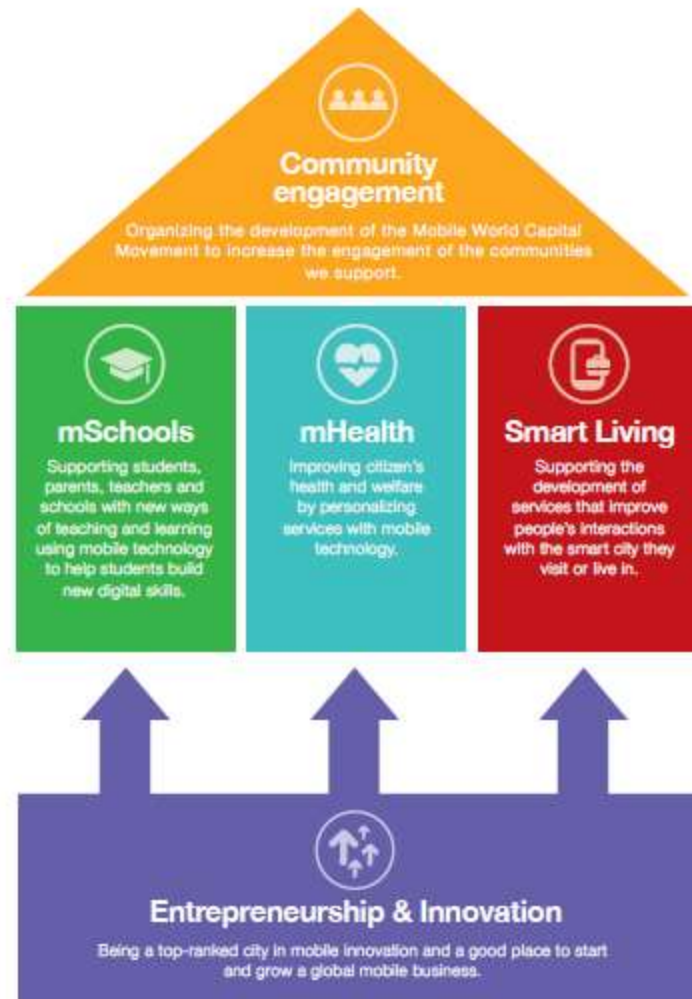
INNOVATION & CREATIVITY

- **7,000** companies working in innovation related fields.
- **30** ideas and business incubators.
- Barcelona nominated **iCapital** by the European Commission.
- Barcelona ranked **4th most creative** city in the world.
- Barcelona is the **4th Smart city in Europe and the 10th worldwide.**

QUALITY OF LIFE & CONNECTING PLATFORMS

- **#1** European city in quality of life for employees.
- **311** sunny days per year.
- **#10** tourist destination in the world, **#4 in Europe**.
- **#1** ranked city for people attending congresses.

BARCELONA *inspires*

A HUB FOR MOBILE AND DIGITAL BUSINESS FOCUSED ON PRIORITIES FOR PEOPLE

engaging communities

changing education

changing healthcare

changing lifestyles

changing the economy

Community engagement

Organizing the development of the Mobile World Capital Movement to increase the engagement of the communities we support.

mSchools

Supporting students, parents, teachers and schools with new ways of teaching and learning using mobile technology to help students build new digital skills.

mHealth

Improving citizen's health and welfare by personalizing services with mobile technology.

Smart Living

Supporting the development of services that improve people's interactions with the smart city they visit or live in.

Entrepreneurship & Innovation

Being a top-ranked city in mobile innovation and a good place to start and grow a global mobile business.

Changing Healthcare

mHealth

We are witnessing a huge change in the health sector with mHealth solutions boosting the efficiency and effectiveness of the healthcare system. Citizens and patients are improving their quality of life with remote monitoring systems and engaging in self-care.

Improving citizen's health and welfare by personalizing services with mobile technology.

mHealth enablers
Boosting the adoption of solutions and best practices.

Get mHealthy!
Deploying solutions and initiatives for citizens.

Raising awareness
Building an mHealth ecosystem.

mHealth
COMPETENCE CENTRE

To promote improvements in citizen's health and welfare by personalizing services based on mobile technology

Enablers

To accelerate the adoption of solutions and best practices through standards definition and proven methodologies.

INITIATIVES

- ☑ Standards & Interoperability
- ☑ PHR mIdentification
- ☐ Clinical benchmark
- ☐ Social and economic impact analysis

Get mHealthy

To engage citizens in using mHealth and generate public demand for mHealth solutions.

INITIATIVES

- ☑ mHealth CAT Plan
- ☑ Vaccine App
- ☐ mHealth Mental Health Plan
- ☐ BCN mHealthy City

Raising awareness

To disseminate mHealth information and foster the community.

INITIATIVES

- ☑ mobilehealthglobal.com
- ☑ Workshops
- ☐ mHealth Observatory

✓

Mobilise Europe for mHealth

A call for action to enable mHealth adoption

March 2015

The mHealth Task Force, an initiative of Mobile World Capital Barcelona that convenes technology and healthcare, calls on all stakeholders to advance mHealth adoption through three actions:

- Change the conversation from risks and dangers to potentials and opportunities
- Work out mHealth's overall value proposition rather than chasing medical evidence
- Support an enabling environment for innovation

Conclusions

Regulatory Support

Risks:
- Regulations can inhibit the growth of mHealth.
- Some countries seem to be following a 'one-size-fits-all' approach (rigorous standards also applied to non-intrusive, noncritical solutions) → negative impact to the growth of mobile health.

Actions needed:
- Regulations should **effectively address issues as certification, standardization and interoperability** to help increase the **confidence and trust of both physicians and patients**.
- **Concrete roadmap and timeline** on when relevant policies and regulations may be introduced and what might be addressed by such measures.
- Regulations should be **pro-innovation** and aimed at introducing measures that enable affordable and ubiquitous healthcare.

Standardization and Interoperability

Actions needed:
- Regulators have to work together to ensure interoperability and standardisation guidelines for various mobile health ecosystem participants (device vendors, content creators and healthcare providers).
- Ensuring standardisation and interoperability among solutions will help
  - plug-and-play solutions development
  - easy adoption for end-users
  - facilitate scaling

Certification of Devices and Applications

Actions needed:

- Regulators should facilitate **speedy approvals** for vendors and software developers.
- The intent of governments and regulators should be to enable the **rapid creation of a healthy mobile health ecosystem** that benefits both patients and market players.
- It is important for regulators to follow a **harmonised approach** to ensure greater applicability of certified devices and applications **across regions** to encourage greater participation of device vendors and solution developers.

In summary……

- *Confusion amongst consumers regarding the most appropriate app to meet their needs.*

- *Professionals face the same challenge when recommending apps to a patient.*

- *A cencerted effort among stakeholders (payers, providers, developers, …) is needed → evaluation and integration in the system.*

- *Need for evidence generation to demonstrate improvements in the outcomes.*

Global Mobile Health Market

Digital Single Market

European Connected Health Alliance

We bring people, organisations, needs and solutions together

Brian O'Connor
Chair
brian@echalliance.com

The ECHAlliance

The trusted connector

We were founded to facilitate multi-stakeholder connections, to create and strengthen partnerships committed to driving sustainable change in the delivery of health and social care.

Unrivalled Knowledge, Reach and Expertise

Collaborative partnerships

Speeding up progress

G...

Ecosystems are:

- **Multi-stakeholder communities** within a country or region who build projects and implement innovative solutions
- They are **permanent**
- **Regular** (4 meetings per year)
- Part of an **international network** - sharing and learning with other Ecosystems
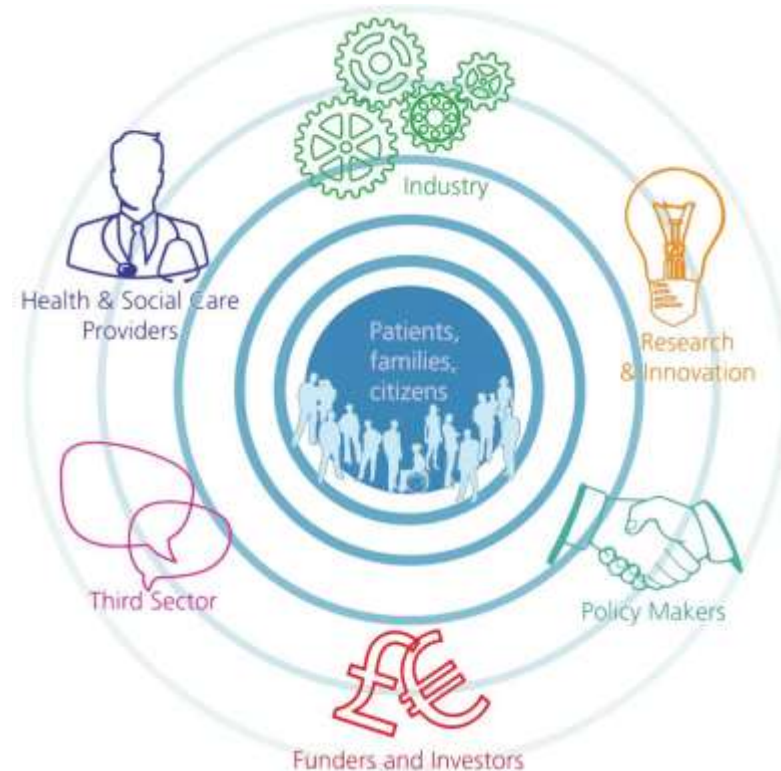
"eHealth Ecosystems could be the answer to the strain our social security systems are undergoing. If we work together and use the enormous potential technology has to offer us, we can ensure top healthcare for all in Europe" Neelie KROES, Former Vice President of the European Commission

mHealth Competence Center: Ready, Steady, GO!

Joan Cornet
Director. mHealth
Competence Center. MWC

May 15, 2014

EXPANDING BOUNDARIES, THE E-PRESCRIPTION CHALLENGE

Falling ill abroad won't be a problem in the future because drugs that patients take in their own countries will be available in all Europe with a prescription. This is a milestone that EPSOS project wants to achieve by expanding boundaries of e-Prescription, a system that some European countries have already implemented.

MORE NEWS

INTERVIEW WITH JOHN MACK

❝

"Many US marketers desperately want to use social media to promote products directly to consumers"

MORE INTERVIEWS

18/05

AMERICAN TELEMEDICINE ASSOCIATION 2014 ANNUAL MEETING

One of the most prestigious forums for healthcare professionals and entrepreneurs in the telemedicine, telehealth and mHealth space. It is an opportunity to meet with leaders in the field and learn about telemedicine best practices and emerging...

♥ **BALTIMORE**
USA

MORE EVENTS

CATALOGUE

Explore apps, projects and other mHealth Solutions

❯

THANK YOU !

mHealth Competence Center – MWC

Director: Joan Cornet, jcornet@mobileworldcapital.com

Manager: Bárbara Vallespín, bvallespin@mobileworldcapital.com

Technical coordinator: Patricia Díaz, pdiaz@mobileworldcapital.com

Join us at: http://www.mobilehealthglobal.com