MovingLife

Stakeholder Conference on the Future of mHealth in Europe

**Future of Mobile Technologies
for Healthcare across Europe**

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Presentation delivered by Alin Stanescu, Qualcommm
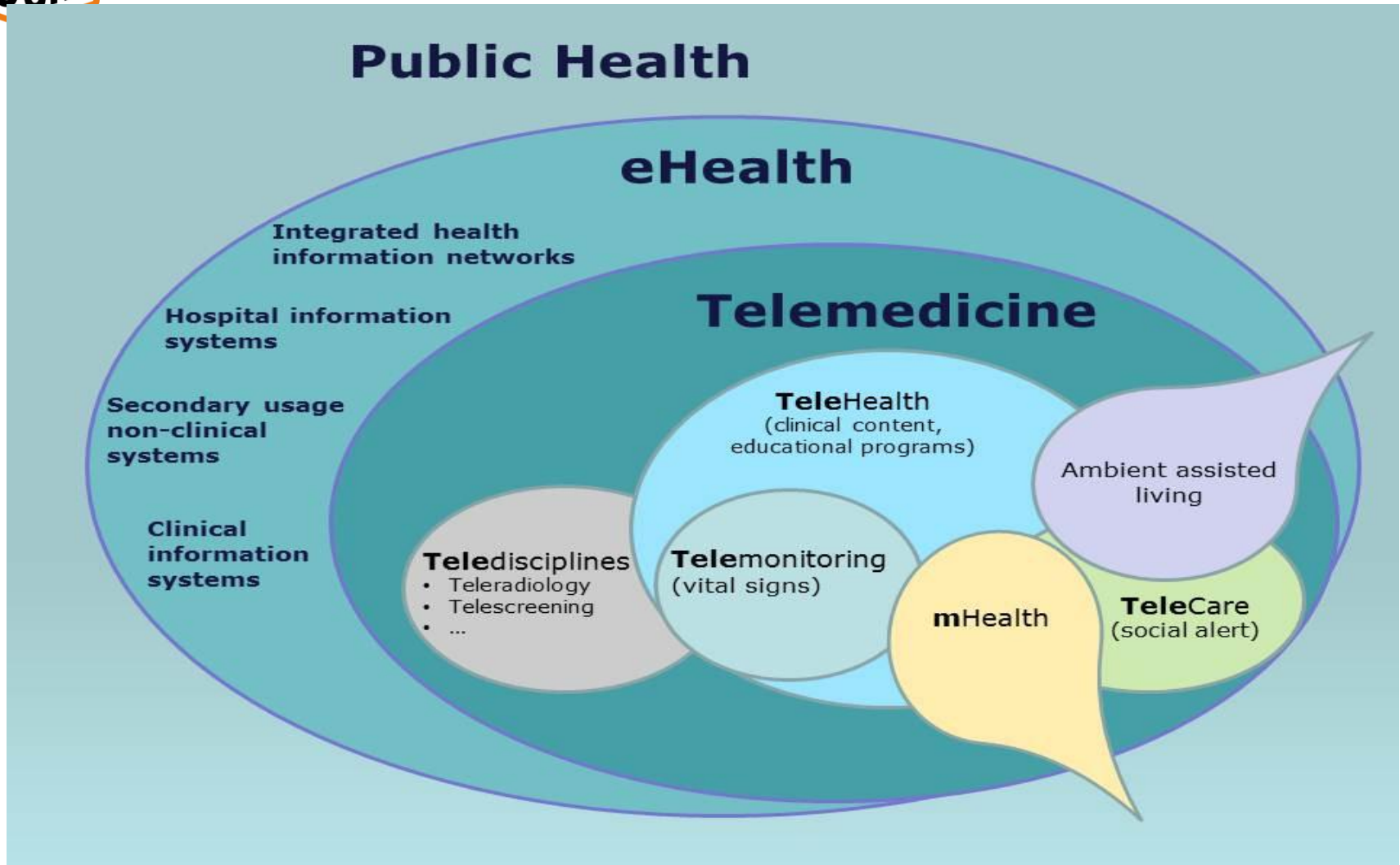
Summary

1. mHealth Technologies

2. Opportunities

3. Market Trends

4. Barriers

5. Regulatory Updates

6. COCIR Recommendations

1. mHealth Technologies

What is mHealth ?

Source: COCIR Telemedicine Toolkit 2011

Mobile technologies: a challenge or an opportunity for better healthcare?

62% of physicians are using tablets

81% of physicians have a smart phone

mHealth: emerging technologies and examples

- Increasing use of wireless functionality to transmit raw data, diagnostic health information, critical aspects of care, emergency services and personalised information.

- At hospitals, at home and outside the home: broadband technologies to seamlessly provide information and connect healthcare professionals, caregivers, patients/citizens and healthcare authorities.

	Mobile data management	Monitoring	Surveillance	Diagnostics
SERVICES	EHRs Schedules Appointments Billing information ePrescription Payment/reimbursement	Drug compliance Chronic illnesses Treatment and medication reminders Surveys/questionnaires Location and resource tracking	Disease incidence Disaster relief Post-market surveillance	Tailored access to medical information resources for specific scenarios Videoconferencing Remote visual diagnosis
TECHNOLOGIES	Smartphones, tablets, connectivity (3G, Wi-Fi), Apps/OS, cloud, web, security, eIdentification, RFID, Bluetooth, GPS, sensors, metres, patches, drug delivery chips, home health hubs			

mHealth Value Chain

2. Opportunities

mHealth Opportunities

1. Healthcare systems are striving to respond to rising demands for better services with fewer resources.

2. MHealth can enable new models of care that improve access and quality, empower patients and make healthcare systems more sustainable in the long term.

3. As multi-standard chipsets and low-energy wireless technologies continue to emerge at increasingly commercially viable prices, and as higher network capacity becomes available, more advanced mobile uses in hospitals, in the home and outside the home will be possible.

A revolution taking place...

1. ## Mobile is the most pervasive communications platform

   In 2013 the number of mobile cellular subscriptions will reach 6.8b, corresponding to a global penetration of 96%, making the cellular network the most pervasive platform that exists today. ITU Statistics, Global ICT developments 2001-2013.

   Source: Pyramid Research (2010), Health check: key players in mobile healthcare.

2. ## Facing established demographic trends

   Healthcare expenditure is expected to grow to 8.5% of GDP in 2060 (from 7.2% in 2010) as a result of demographic ageing alone
   Source: DG ECFIN and AWG (2012)

3. ## Modernising and improving efficiency of healthcare delivery

   Integrating eHealth and mHealth in healthcare delivery brings a degree of sophistication to healthcare systems by allowing a faster flow of information that can transform healthcare systems from a fragmented approach (prevention, primary care, treatment, rehabilitation) to a seamless continuum of care where all levels are closely interlinked
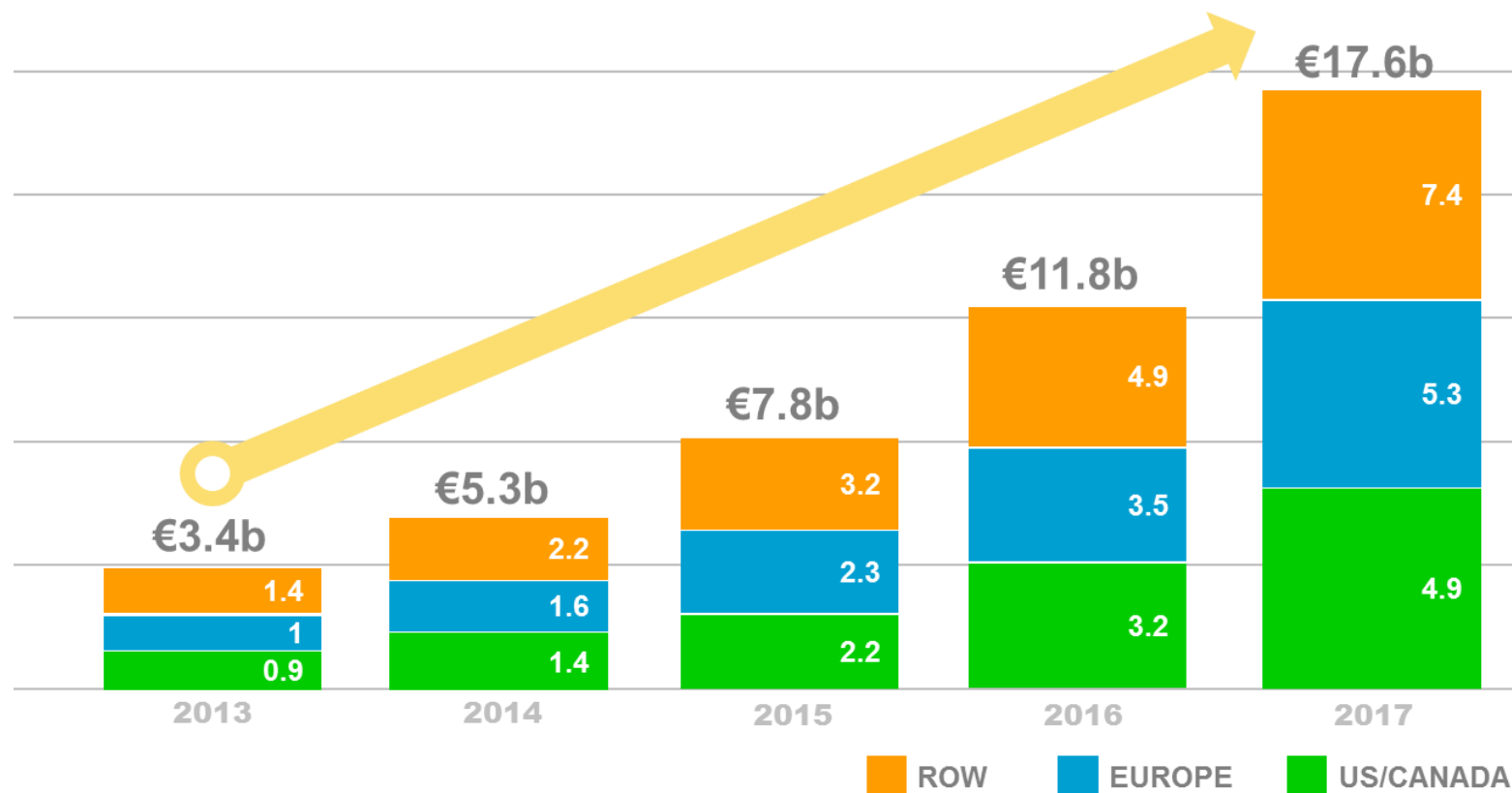
3. Market Trends

Estimated mHealth revenue (2013-2017)

COCIR

€3.4b
- 2013: ROW 1.4, EUROPE 1, US/CANADA 0.9

€5.3b
- 2014: ROW 2.2, EUROPE 1.6, US/CANADA 1.4

€7.8b
- 2015: ROW 3.2, EUROPE 2.3, US/CANADA 2.2

€11.8b
- 2016: ROW 4.9, EUROPE 3.5, US/CANADA 3.2

€17.6b
- 2017: ROW 7.4, EUROPE 5.3, US/CANADA 4.9

ROW EUROPE US/CANADA

Growth of mHealth Apps
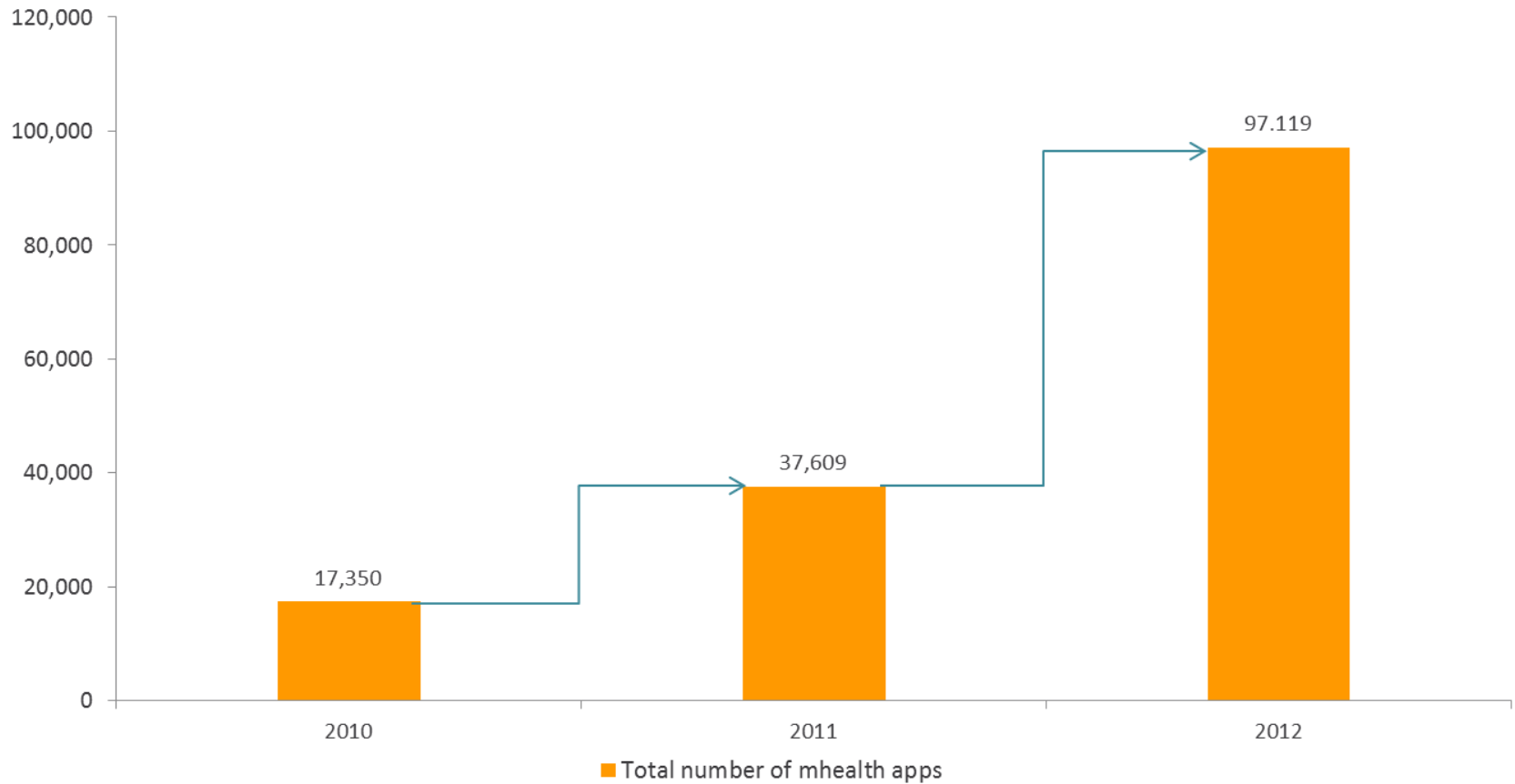
Source: Research2Guidance, 2013

4. Barriers

Barriers

1. Insufficient awareness and confidence
2. Slow digitisation and health information exchange
3. Market fragmentation
4. Data protection regimes
5. Budget restrictions

5- Regulatory Updates

On-going considerations

- **At European Level:**
  - Medical Device Regulation
  - Green Paper from DG Connect
  - Data Protection Regulation
- **At International level:**
  - New Item on Medical Software

New!

Approved in 2013 by:

Submitted in 2012 by:

IMDRF

DITTA GLOBAL **D**IAGNOSTIC IMAGING, HEALTHCARE IT & RADIATION THERAPY TRADE ASSOCIATION

International Standards supporting smart regulations

- An important on-going work at International Level: 3 key references to remember
  - ❑ **IEC 82304-1**
  - ❑ **IEC 62304 Ed2**
  - ❑ **IEC 80001-series work (hospital networks)**

COCIR Recommendations

1. Integrate mHealth in healthcare care delivery structures

2. Develop appropriate reimbursement strategies

3. Enable patient access to their data

4. Support mobile broadband policies that sustain investment in connected services

5. Clarify regulatory obligations for mHealth

6. Foster use of market-led international standards

Thank you for your attention

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