

The opportunity for AHA market

- ✓ The number of +65 in the EU's 27 member states will increase from 17% in 2010 to around 30% by 2060.
- ✓ Age-related expenditure e.g., health care, social services, and pensions - will increase to nearly 30% of GDP in the EU 27.
- ✓ Healthcare innovations developed in the past years have expanded the access to life-saving therapies
- ✓ Mortality has decreased in all age ranges in the past years, at the expense of a higher morbidity and an increased number of life years with chronic diseases.

Ahtonen, A. (2012). Healthy and active ageing: Turning the 'silver' economy into gold. Retrieved from

http://www.bizkaia.eus/ogasuna/europa/pdf/documentos/heaj1204.pdf?has h=e3c2d6df5b0c3f7f18a163845ebc0bb4

Jorge Posada. (2017, May 27). 4 Reasons Why 'Active and Healthy Ageing' will become a key market niche. Retrieved 24 September 2019, from Activage Project website: http://www.activageproject.eu/blog/2017/05/27/4-Reasons-Why-'Active-and-Healthy-Ageing'-will-become-a-key-market-niche/index.html





The case of the patient monitoring market in Europe.

The number of remotely monitored people grew in 2017 to 16.5 million with the most recent projections suggesting 83.4 million remotely monitored patients by 2023.

Sales for monitoring systems have been increasing by about 6.1% annually since 2012.

AHA Market: services and fragmentation

The AHA market is highly complex and has a vast range of sub-sectors, health and social care products, as well as services and industry players involved.

Leissure

Health & antiaging medicine



Accessibility

Tourism

Transport

AHA Market: demands and needs

Main users' needs are:

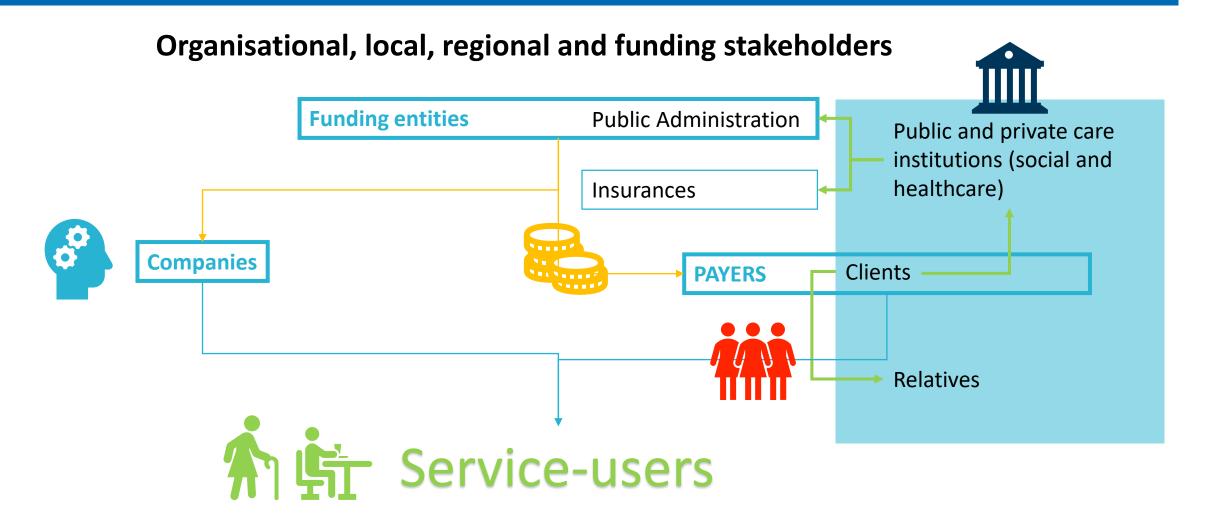
- Enhanced access to health and social care
- Faster access to emergency response
- Monitoring (including the remote monitoring) of medical parameters and any other required measurement
- Communication with health and social care professionals
- Communication with peers and relatives, socialization
- Mobility and accessibility to facilities, including in-home facilities
- Supervision of quotidian routines
- Physical and emotional security
- Secure communications, IT security and cybersecurity
- Entertainment, leisure, culture, tourism...

Leissure

lealth & antiaging medicine

Heath Assisted living and home

AHA Market in the EU: who is the client?



Fragmentation in the AHA market

Market fragmentation

AAL solutions are offered across Europe by many small enterprises, creating a 'long tail' of fragmentation, hampering efforts to implement innovation at scale. Several barriers derived form this fragmentation when entering into and expanding sales in European markets.

Privacy and security concerns at individual, organisational and policy level

Consent: On the one hand, consumer willingness to share data should be encouraged.

Privacy: Compromise between an improved and personalised service offering and privacy.

Integrated care: Sharing data is key to drive innovation and improve health and care, while awareness on privacy rights should be gurarantee.

Regulatory environment

Complex regulatory environment

The regulatory environment is complex, cross-country and mediated by the need for an enhanced interoperability, common standards, more agile data sharing.

- General Data Protection Regulation (GDPR)
- Medical Device Directives, which harmonises the rules for the circulation of medical devices in the EU.
- The e-Commerce Directive.
- Directive on Distance Contracting.
- Directive on Electronic Signatures.
- Competition law.
- Directive on Professional Qualifications.
- Reimbursement.

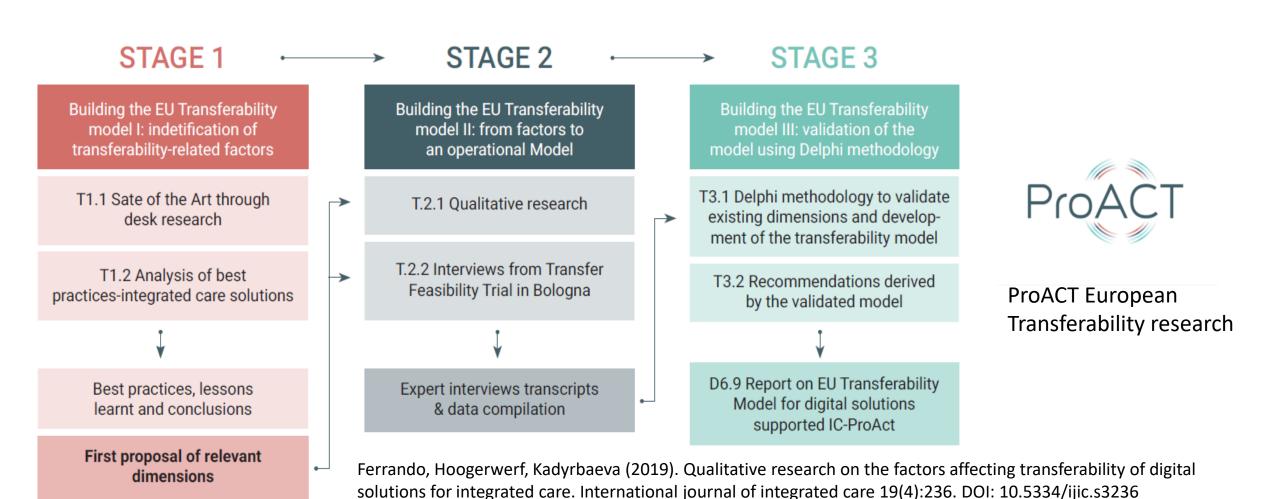
A positive environment for the AHA market

- EC is supporting a common market for health (Digital Single Market)
- European Directive on Patient's Rights for cross-border healthcare
- The EC willingness for 'European Standardisation' in order to boost the interoperability of eHealth systems

Ahtonen, A. (2012). Healthy and active ageing: Turning the 'silver' economy into gold. Retrieved from http://www.bizkaia.eus/ogasuna/europa/pdf/documentos/heaj1204.pdf?hash= e3c2d6df5b0c3f7f18a163845ebc0bb4

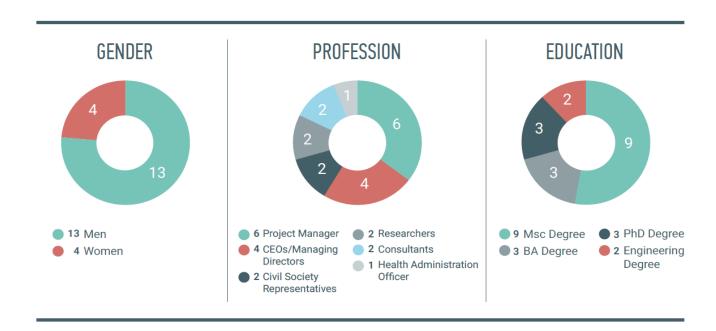
Digital Health and Care TRANSFORMATION OF HEALTH AND CARE IN THE DIGITAL SINGLE MARKET - Harnessing the potential of data to empower citizens and build a healthier society European health challenges Support European Commission: Ageing population and divortic diseases putting. Secure access and exchange of health data pressure on health budgets Ambition: 8 Unequal quality and access to healthcare services Otizons securely access their eleath Digital Service Infrastructure will deliver Initial cross-border services (patient summanes and Shortage of health professionals health data and health providers effercalphonal) and cocoests on between participating countries will be strengthened. Procesals to extend scope of elevath pros-bodier services to additional cases, e.g. full electronic health records. (doctors, pharmacies, J can Potential of digital applications Recommended exchange forms: for interspersiolity of existing electronic health records in Europe. exchange them aggss the EU. and data to improve health Health data pooled for research Efficient and integrated healthcare systems and personalised medicine Personalised health research, diagnosis and treatment. Prevention and citizen-centred health services - Voluntary collaboration mechanisms for health research and direct practice istarting with fore million genomes by 2022' twiget). (data infrastructure) . Specifications for secure access and exchange of health data. poense, Jalowno What EU citizens expect... targeted and faster - Piot actors on rare diseases, infectious diseases and impact data research, diagnosis and To access their own health data Digital tools and data for citizen fregunno interoperable and quality health data empowerment and person-centred healthcare To share their health data - Facilitate supply of impositive digital-based solutions for health, also by SMEs, with common processes and confication Support demand uptake of irrovative digital-based solutions for health, notably by healthcare authorities and (receiving and providing providers, with exchange of practices and technical assistance To provide feedback on quality Mobile more efficiently public funding for innovative digital-based solutions for health, including EU funding.

A research on success and failure factors for transfer & scale up of digital solutions in the AHA market



Experts sample (N=20)

- More than 7 years of expertise in integrated care (practice or research)
- Representativeness of countries with different health & welfare models (13 countries)
- Heterogeneity: backgrounds, private/public institutions, social/health care sectors,
- Experience on transferring or adapting solutions for integrated care in their institutions.



Transferring and scaling up in the AHA market



TRANSFERRING DIGITAL SOLUTIONS SUPPORTING INTEGRATED CARE ACROSS EUROPE: A MODEL OF FACTORS FOR SUCCESS OR FAILURE

ESSENTIAL RELEVANT SOLUTION-SPECIFIC usability & evidence on adaptability trialability cost solution design potential benefits ORGANISATION-SPECIFIC availability organisational learning leadership compatibility openness culture climate (interoperability) engagement of resources to change PROCESS-SPECIFIC formalised participatory engagement of planning execution and opinion leaders mechanisms internal leadership evaluation

INDIVIDUAL-SPECIFIC



The ProACT project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 689996. The content of this Infographic reflects the views only of the ProACT Consortium, and

Based on the Consolidated Framework for Implementation Research (CFIR)

Damschroder, L. J., Aron, D. C., Keith, R. E., Kirsh, S. R., Alexander, J. A., & Lowery, J. C. (2009). Fostering implementation of health services research findings into practice: a consolidated framework for advancing implementation science. *Implementation Science*: *1S*, 4, 50. http://doi.org/10.1186/1748-5908-4-50

This infographic has been produced for the study into factors that impact on the transferability of integrated care platforms across Europe, performed as part of the ProACT Project by Maite Ferrando, Association for the Advancement of Assistive Technology in Europe (AAATE), Asel Kadyrbaeva, Eu-

Enhancing transferability in AHA: I2M essential

Characteristics of the digital solution



Ensure adaptability, usability and trialability of the digital solution to transfer



Exploit co-creation methods to design digital solutions meaningful for the context to transfer



Leverage on the evidence about the outcomes and benefits of the IC digital solution to transfer Rationalise costs and provide data on efficiency of the transferability against "ad hoc" digital solutions or "no digitally supported" IC.

Organisational settings for transferring



Evaluate the national context, care models and legal frameworks of application of the organisation to transfer



Identify the organisation culture and values and engage relevant leaders



Encourage learning climate, openness and flexibility towards new tools and positive change



Leverage on standards and common language to facilitate transferability of IC digital solutions

Process



 Focus on elaborating an adequate strategy for the transferring process including planning and continuous evaluation methodology



Engage leaders (formally and informally designed) and involve them with relevant users and stakeholders within a collaborative approach



 Use continuous evaluation feedback to timely react to the identified barriers and risks.

Individuals within the organisation



Identify beliefs and behaviours that may be linked with low or suboptimal perception of self-efficacy



Address fear of failure as a keystone for innovation



Consider peer learning and exchange of knowledge as a driver for self-efficacy and motivation





Introduction



I₂M

WHAT SO FAR

- To define and describe the AHA market in Europe for innovative solutions, detecting investments (business opportunities) and identifying the gaps between demand and supply.
- To co-design, co-develop and validate with the key stakeholders for AHA innovation and the European Commission, an Innovation to Market (I2M) plan to foster market uptake of AHA innovative solutions.

WHO

(Target groups identified as key I2M beneficiaries)



Public purchasers
(regional/local public
authorities and
agencies) of innovative
AHA solutions



Developers and suppliers of innovative AHA solutions (focus on SMEs and startups)

12M Plan design

empathise

Toundation of a human
Define

Mode during the design arrows in

Foundation of a humancentered design process Necessary to Observe, Engage and Immerse.

Empathy findings are unpacked and synthesized into compelling needs and insights

Mode during the design process in which the focus lies on idea generation

Getting ideas and explorations out

of the head into

the physical world

X

Test

Chance to refine and improve solutions

1st Follow Up Call with all I2M Stakeholder Forum participants Outcome Validation of I2M Plan structure

12 July 2018 9.30 – 10.30 am CET

Submission 1st draft I2M Plan to the EC

4 Oct 2018

Submission publishable version I2M Plan

11 Oct 2018

21 June 2018

12M Stakeholder Forum Outcomes:

- Workshop report
- Validation of gaps/scenarios
- Possible list of actions
- 1st draft structure of I2M Plan

KPIs

29 Aug 2018

9.30 - 10.30 am CET

2nd Follow Up Call with all I2M Stakeholder Forum participants *Outcome:*

Validation of I2M activities





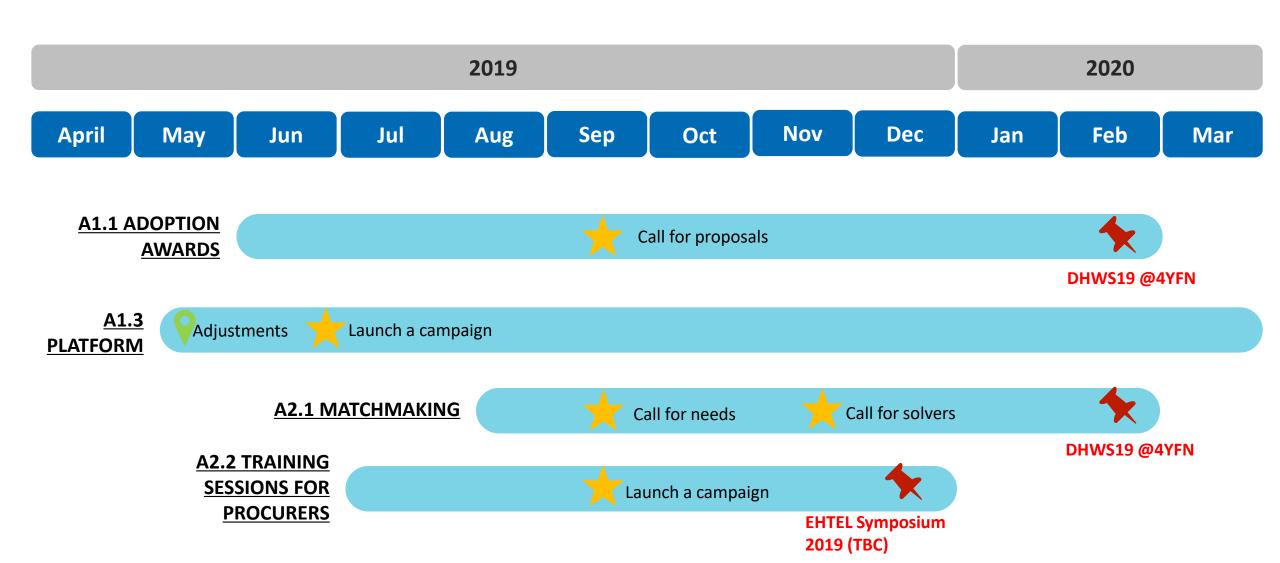
4 Jun 2019

Methods, tools and facilities used for I2M design

- Desk search
- Building upon parallel EC studies: the outcomes of the study "Large-scale sustainable deployment of digitally-enabled innovation for health and care delivery to the ageing population" (demand side methodologies used: interviews + survey) are complemented with the online questionnaire administered to SMEs and startups which received EU funding
- Stakeholder Forum Virtual Meetings for validation, action prioritization and refinement
- Liaison with other international events and initiatives (e.g. AAL forum 2019) for I2M implementation

Outlook of the activities taking place in 2019-Q1 2020





Action line 1: Visibility and awareness

1. Adoption Award

Objective: To identify AHA uptake success stories, promoting successful tandem and give visibility and recognition to the first adopters of cutting-edge innovation in eHealth.

Target participants: AHA organizations (buyers/adopters) & Companies (suppliers)

Expected results: Provides good market insights and examples of market penetration + benefits for suppliers and emergence of "global" EIP on AHA champions.

Call Preparation Recruitment of Participants

Selection of Finalists Appointment of the Jury

Live Event & Selection of Winner

Post-event Dissemination







@4YFN Mobile World Congress 2019

26 and 27 February 2019, Barcelona

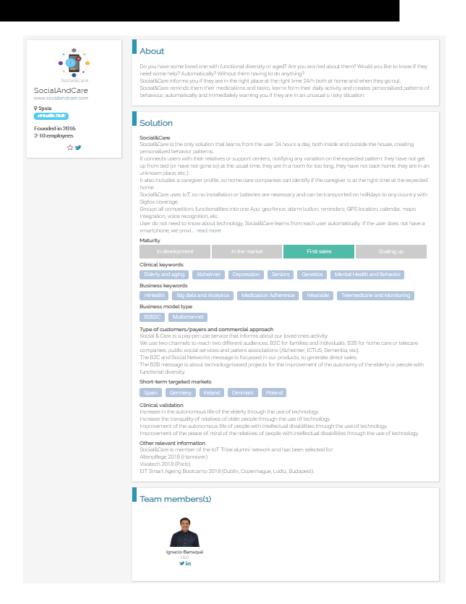
Action line 1: Visibility and awareness

3. Needs showcase and solutions scouting platform

Objective: To facilitate the efficient matchmaking between eHealth SMEs and other actors in the ecosystem.

Target participants: Investors, regulatory and legal experts, business supporters, big corporations (pharma/MedTech companies) and healthcare organisations.

Expected results: Easier identification of current needs of AHA stakeholders. Scouting of AHA solutions at ease, powered by the different filters the platform includes + savings in time and facilitated matchmaking between supply and demand.



1. Matchmaking sessions

Objective: To facilitate networking and matchmaking between demand-side stakeholders and AHA solution owners and developers. To support AHA organizations seriously looking to procure a digital health solution in the near future but not finding their perfect match in the market, either because there is no perfect or because the perfect match is outside their field of vision.

Target participants: AHA organizations (buyers) & SMEs (suppliers)

Expected results: the 2 matchmaking sessions will result in suppliers getting a better understanding on their customers' needs and on how to align technology to better solve these problems and therefore unleash demand.





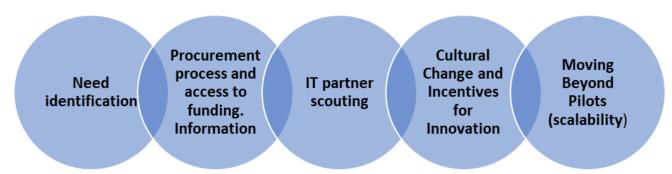
2. Training sessions on AHA innovation adoption

Objective: Guide buyers/procurers along the AHA innovation buying process, covering the whole cycle starting from need identification to the adoption of the solution.

Target participants: AHA organizations (buyers/procurers)

Expected results: Increase the knowledge and the capability of the demand stakeholders in the

management of innovative procurements.



The five main circles of activity of the training in innovation adoption

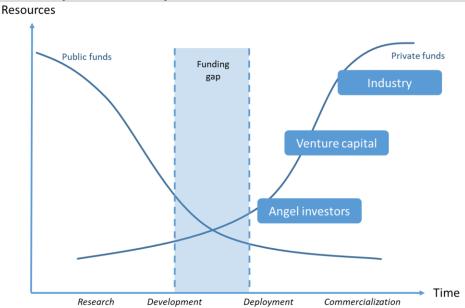
2020

3. Online training sessions for SMEs

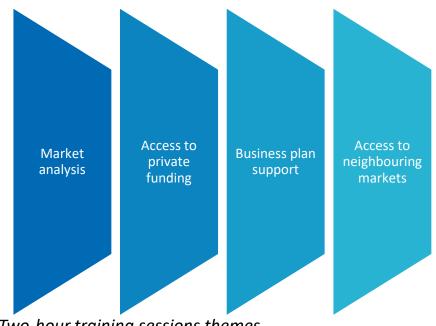
Objective: To train eHealth SMEs and start-ups on how to present a business value proposition in a clear and convincing way, being able to explain the potential of a business idea and catch the attention of investors.

Target participants: SMEs and start-ups (suppliers)

Expected results: SMEs and start-ups will be better prepared in order to obtain funding and remain on the market up until they achieve their first return on investments.



Funding gap for start-ups and SMEs before accessing the market



Two-hour training sessions themes

2020

4. Online repository of reimbursement systems

Objective: To facilitate the access to information on national reimbursement systems in the EU, supporting the suppliers in their price setting hence their chance of returns on investments.

Target participants: SMEs (suppliers)

Expected results: SMEs and start-ups will have access to one central source of information on their potential

markets, saving them time and human resources in their search for business intelligence.

Country	Product / Service	Level	Payer
Netherlands	Teleconsults reimbursed since 2018	National	Statutory Health Insurance (SHI)

Learning

- Teleconsults are reimbursed as hospital visits
- this stimulates doctors to treat patients in a @home situation, with or without telemonitoring devices and or symptom based
- this is for all specialism within hospital care

Examples of a service which is routinely funded / reimbursed in The Netherlands (Source: Proposed Guiding Principles for Reimbursement of Digital Health Products and Solutions Prepared for adoption by a SubGroup of the eHealth Stakeholder Group, April 2019

Action Line 3: Transfer activities

Objective: Establish personal contacts in practical exchanges and visits to each other's regions.

Target participants: AHA organizations (buyers)

Expected results: By getting to know their counterparts in other Member States, buyers will see for themselves how innovations for AHA are being sourced and adopted. This in-vivo exchange of best practices will eventually lead to an upscale of innovative procurement solutions for AHA.

Suggested services to be offered in the I2M plan include twinning activities, physical visits to other regions/ecosystems. A total of 3 twinnings could be organised during the duration of WE4AHA in order to gain direct contact to best practices and successful scaling up of AHA innovations.

Deadline first edition 15
June 2019

Transfer of Innovation

Twinning Support Scheme

2019-2020



Action Line 4: Dissemination

Objective: To raise awareness and ensure maximum visibility of the success stories and actions among all identified stakeholders plus the broader public.

Target participants: AHA organizations (buyers) and SMEs (suppliers)

Expected results: Information about I2M activities and measures will impact buyers and suppliers will spur interest in EIP on AHA and opportunities at the European level in order to facilitate the adoption of AHA solutions.













Actions launched/to be launched







eHEALTH HUB PLATFORM

The map of European digital health. Find. Be found. Save time.











1. Matchmaking sessions.



Why?

Healthcare Organisations

Get to know the latest technological developments in AHA that can solve your need

Connect with other healthcare providers who have similar needs

Access a large network of European innovators

Gain visibility in the European healthcare community as an innovative healthcare organisation

Connect with **potential customers**

Solutions providers

Get a better understanding of customers' and users' needs

1. Matchmaking sessions



To whom?

- Healthcare organisations to proposed identified unmet needs looking for a solution in the field of AHA
- Companies developing digital health solutions able to solve the proposed needs

How?

Call is published on <u>EIPonAHA website</u>: <u>I2M section</u>

When?

Call for need identification

20 September
2019



21 November 2019



Call for solutions

2 December 2019

Announcement of selected solutions

30 January 2020

Matchmaking session at Digital Health & Wellness Summit in Barcelona @4YFN / MWC

24th – 27th February 2020



2. Adoption Awards



Why?

The aim of the Adoption Awards is to identify innovation uptake success stories, giving visibility and recognition to the first adopters of cuttingedge innovation in Health.

- Rewards a tandem of both buyer and supplier for the adoption of an innovation
- Empowers the figure of "European adoption pioneers", so their experiences and lessons-learned can inspire further organizations
- Avoids being the first to incorporate new solutions by identifying leads already implemented

2. Adoption awards



To whom?

• Tandems of Healthcare organisations and solutions providers that have successfully adopted an innovation

How?

- Stay tuned. The call will come shortly
- Call will be published on **EIPonAHA website: I2M section**

When? (tentative dates)

Call for candidatures

Mid October 2019



Evaluation of Candidatures

January 2020



Selection of three finalists who will come to the Award Ceremony:

End January 2020

Award ceremony at Digital Health & Wellness Summit in Barcelona @4YFN / MWC

> 24th – 27th February 2020

eHEALTH HUB PLATFORM

The map of European digital health. Find. Be found. Save time.





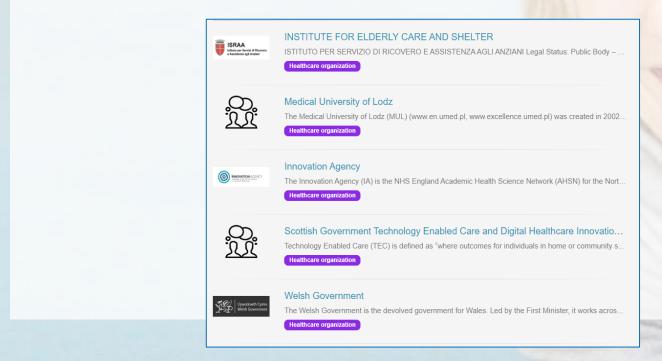
NOW CALLING ALL ACTIVE AND HEALTHY AGEING ORGANISATIONS

platform.eheath-hub.eu

3. eHealth Hub Platform: Need & solutions scouting



Are you an active player in Active and Healthy Ageing? If you are an SME, a healthcare organisation or a researcher working in this field, the eHealth HUB Platform will make sure that you are in the spotlight





3. eHealth Hub Platform: Need & solutions scouting



Why?

- Enhances transparency in the digital health sector
- Enables stakeholders' interactions to promote and accelerate business growth,
 - Gain visibility
 - Identify the latest developments,
 - Find potential partners to work with,
 - Understand the market need

To whom?

All digital health stakeholders

How?

platform.eheath-hub.eu

When?

Start right now!!

eHEALTH HUB PLATFORM

The map of European digital health. Find. Be found. Save time.









4. Successful adoption of healthcare innovation



Why?

I2M stakeholders outlined that **most buyers** (public or private healthcare and social organisations) were not always **adequately skilled** to even identify their own needs and guide their choices in terms of innovations.

- Most support seems to go to suppliers of the technologies
- However, buyers usually feel lost and unskilled for starting what sometimes can be a risky process
- Buyers frequent wonders are how to fund the innovation, how to overcome the barriers to introduce innovation and how to succeed when implementing it

4. Successful adoption of healthcare innovation



To whom?

Public and Private Healthcare and/or Social Organizations.

How?

 Participatory training to guide buyers along the innovation buying process, covering the whole cycle starting from need identification to the adoption of the solution.

When?

• Stay tuned. The call will come shortly



