eHealth Innovation

Globalisation and Innovations in (e)Health – Opportunities and Challenges for the EU and USA

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MEDICA MEDIA FORUM — Das unabhängige Forum für eHealth, Telemedizin und medizinische Informationstechnologie — World Forum for Medicine

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eHealth Innovation

Outline

- **Some facts**
- **Challenges**
- **Opportunities**
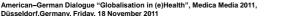- **Cooperation**

Some Facts & Challenges (I)

- *Provision of Health and (long-term, social) care services* is a local/regional business (ca. 95%), ca. 99% is national, and very little European or global (http://www.ten4health.eu/)
- The same holds for *eHealth services*: barriers are
  - differences in health system design and regulation,
  - technical and semantic interoperability,
  - national infrastructures (ID management, data protection, security challenges, ...),
  - legal frameworks, etc.

  They prevent presently any significant expansion of the market

- Witness the challenges encountered by the 5-year epSOS trans-European project to provide cross-border exchanges of basic patient summaries or ePrescriptions (www.epsos.eu)

Some Facts & Challenges (II)

The EC cross-border health care Directive is a big step forward, but will need many years to be transferred into national laws, and to evolve its impact on a *unified European healthcare market*

(DIRECTIVE 2011/24/EU OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 9 March 2011 - http://ec.europa.eu/health/cross_border_care/policy/index_en.htm)

- Scope:
  - Rules for facilitating the access to safe and high-quality cross-border healthcare
  - Promotion of cooperation on healthcare between Member States,
  - "This Directive shall apply to the provision of healthcare to patients, regardless of how it is organised, delivered and financed." (Article 1)
  - But: It fully respects national competencies in organising and delivering healthcare
- Areas covered:
  - Recognition of prescriptions issued in another Member State (Article 11) – developmend of IOp Guidelines

    ePrescription cross-border

  - European reference networks (Article 12)
  - Rare diseases (Article 13)
  - eHealth (Article 14)
    - voluntary network connecting national authorities responsible for eHealth
    - patients' summaries to enable continuity of care and patient safety across borders
    - developing common identification and authentication measures to facilitate transferability of data
  - Cooperation on health technology assessment (Article 15)

"Upstream" Opportunities

- **When focusing on *eHealth industrial* and service providers *upstream to the healthcare value system itself*, the vision of a global market seems much more realistic and meaningful.**
- **This market has never met the unrealistic forecasts of market research companies, but nevertheless seems to develop steadily.**

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Longer-Term Future

"As people get richer and consumption rises, the marginal utility of consumption falls rapidly. Spending on health to extend life allows individuals to purchase additional periods of utility. The marginal utility of life extension does not decline.

As a result, the optimal composition of total spending shifts toward health, and the health share grows along with income."

HALL / JONES (2007)

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Meeting Market and Stakeholder Needs

- **A big stumbling block for (global) market development is the** *complexity of markets and the diversity of stakeholders*
  - **Both (health & RTD) policy on both sides of the Atlantic and industry need to focus on inventions**
    - **having the potential for real innovations & diffusion**
    - **meeting user and provider needs**
    - **therefore can be expected to be sustainable and to scale.**
- **Interdependent stakeholders must have better access**
  - **to information needed for decision making and**
  - **proving their eHealth business models**

Otherwise attempts to advance innovations will fail to provide the urgently needed benefits for industry and our health systems.

Results of the transatlantic (EU-USA) ARGOS eHealth Pilot Project on "Transatlantic Observatory for Meeting Global Health Policy Challenges through ICT-Enabled Solutions"

- *Policy perspective:* **The EU, individual Member States, the USA, OECD, WHO as well as industry need to cooperate**
- *Strategy*: **key strategic steps should be:**
  - **Identify, analyse, and agree on key policy priorities**
  - **Conduct cross-country analyses and benchmarking of policies, achievements and lessons learned**
- *Tactics:*
  - **Start small**
  - **go for low hanging fruit / immediately shared issues**
  - **but also for fundamental issues in need of a considerable cooperative effort**

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