mHealth

mHealth in Today's Market

Amadeu Castro, Director, GSMA Brazil

10 December 2012

What is the GSMA mHealth Programme?

Supporting **cost-effective** delivery of **better healthcare** for **everyone**

The purpose of the GSMA mHealth Programme is to support the development of mobile health solutions that increase patient access to quality care whilst reducing costs

© GSM Association 2012

What is mHealth?

Solutions across the Patient Pathway

Prevention → Diagnosis → Treatment → Monitoring

Healthcare Systems Strengthening

- Emergency Response
- Healthcare Surveillance
- Healthcare Practitioner Support
- Healthcare Administration

Source: GSMA PwC February 2012

© GSM Association 2012

What are the benefits of mHealth?

mHealth benefits

patients, providers, payers, **vendors**, nations

and the world

Mobile health offers solutions that can result in **better care** for more people at **lower cost**

© GSM Association 2012

More than 900 deployments worldwide

North America	
Dec 2011	49
Oct 2012	184

Europe	
Dec 2011	58
Oct 2012	117

Asia	
Dec 2011	87
Oct 2012	167

Middle East	
Dec 2011	21
Oct 2012	45

Latin America	
Dec 2011	29
Oct 2012	83

Africa	
Dec 2011	135
Oct 2012	287

Oceania	
Dec 2011	8
Oct 2012	20

Source: GSMA Connected Living Tracker, October 2012

© GSM Association 2012

mHealth deployments in Latin America

Diabetes self management tool for treatment advice and medication adherence

Mobile-based medical references for health workers

Mobile phone applications to improve maternal and child health in rural areas

Primary health advice by phone

Access to electronic medical information in databases and e-journals via smart phones

Teleconsultation and remote diagnosis

SIM and smartphone applications for health data collection

Mobile app to help patients manage diabetes

Integrated Web and mobile platform for disease surveillance

Screening cataract, trachoma and refractive errors in remote areas with no medical assistance

Automated system using voice, SMS and a web-based medical record to monitor and support patients

mHealth support for people with high blood pressure

Advice, guidance and support via mobile phone

© GSM Association 2012

US $23 billion global market opportunity

Latin America will represent 7% of global mHealth market by 2017

© GSM Association 2012

Source: GSMA PwC February 2012

Brazilians perceive the benefits of mHealth

- **98%** of healthcare providers…
- **84%** of patients…
- **73%** of wellness consumers…
- …see a benefit to mHealth

- **67%** of healthcare providers…
- **52%** of patients…
- **44%** of wellness consumers…
- …believe that mHealth leads to better quality care

- **75%** of healthcare providers…
- **56%** of patients…
- **52%** of wellness consumers…
- …believe mHealth supports diet and lifestyle changes

- **43%** of healthcare providers…
- **55%** of patients…
- …believe mHealth reduces the need for outpatient consultations

© GSM Association 2012

Brazilian HCPs' perceived issues with mHealth

- **71%** of healthcare providers feel there are currently issues that prevent them from using mHealth more often
  - 60% "Not suitable for all patients"
  - 40% "Not integrated with my current systems"
  - 38% "Solutions will be too expensive"
  - 36% "I am not remunerated for work done with mHealth"
  - 35% "Concerns about who will provide technical support"
  - 33% "Lack of knowledge of solutions"
  - 32% "I am concerned about potential liability / litigation

- For mHealth to become mainstream in Latin America, mobile network operators must address these concerns

© GSM Association 2012

What are the barriers?

Market currently lacks:

Awareness of mobile health capability

Universal acceptance from healthcare providers, payers and patients

Mature regulations, policies and standards

Interoperable and scalable solutions

Established business models and partnerships

© GSM Association 2012

How do we overcome the barriers?

Harmonised regulation

Interoperable, scalable solutions

Buy-in from governments, payers, patients and healthcare providers

All are needed to accelerate

regional deployment of

localised products and services

© GSM Association 2012

GSMA Latin America engagement plan

- Mission
  - Work with ministries of health and other key healthcare stakeholders to set up a government initiatives for implementing remote monitoring solutions using mobile technology
- Objectives
  - Increase buy-in for mHealth solutions from government, payers and healthcare professionals
  - Position mobile operators as the platform for mHealth
  - Address key barriers to deployment
- Strategy
  - Demonstrate impacts and outcomes from global initiatives
  - Use a collaborative approach involving all key stakeholders
  - Motivate government to develop roadmap for deployments

© GSM Association 2012

Partnership and collaboration

© GSM Association 2012

Why should you be involved?

A US$ 1.6 billion opportunity to serve the healthcare needs of the region's people

Contact

Valter Wolf

vwolf@gsm.org

© GSM Association 2012

Mobile Health

Thank You

www.gsma.com/connectedliving/mhealth/

mhealth@gsm.org