



GSMA programme and Diabetes initiative

25 April 2012

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Connected Living: mHealth Mission 2012/13

A pair of hands is shown holding a small, realistic globe of the Earth. The globe is centered on the Americas, with North and South America visible. The background is black, and a small, bright moon is visible in the upper left quadrant. A semi-transparent grey box with red text is overlaid on the center of the image.

To reduce the cost to serve, extend reach and improve quality of care to patients, by accelerating the development and adoption of scalable and interoperable operator led mobile health solutions

GSMA's programme entering the 3rd year



2010/11

Foundation

Framing the opportunities and challenges for Mobile Health

2011/12

Capabilities

Developing the capabilities and knowledge to be able to accelerate a scalable sustainable market (e.g. reference architecture, evidence guidelines, device regulation)

2012/13

Market Acceleration

Addressing the existing market barriers and pushing for market acceleration of Mobile Health, where mobile operators play a leading role in creating a scalable and interoperable market

FOCUSING ON MARKET ACCELERATION

GSMA mHealth programme objectives



Objectives:

- Showcase mobile health solutions and catalyse cross-industry awareness and knowledge
- Demonstrate the outcomes and impacts on individuals, healthcare systems and society
- Foster new relationships and partnering with the healthcare sector and mobile industry
- Stimulate scalable and replicable solutions and drive towards interoperability at critical junctions
- Promote supportive policy and regulatory principles for growth and innovation



Connected Living: mHealth Objectives 2012/13



Mission

To reduce the cost to serve, extend reach and improve quality of care to patients, by accelerating the development and adoption of scalable and interoperable operator led mobile health solutions

Strategic Objectives 2012/13

Market Acceleration

- Increase the number of operator led mobile health trials and service launches that generate clinically relevant evidence and demonstrate the use of operators assets beyond connectivity

Increase Market Pull

- Stimulate the demand side of mobile health ecosystems to drive the need for mobile health solutions to be introduced into the market

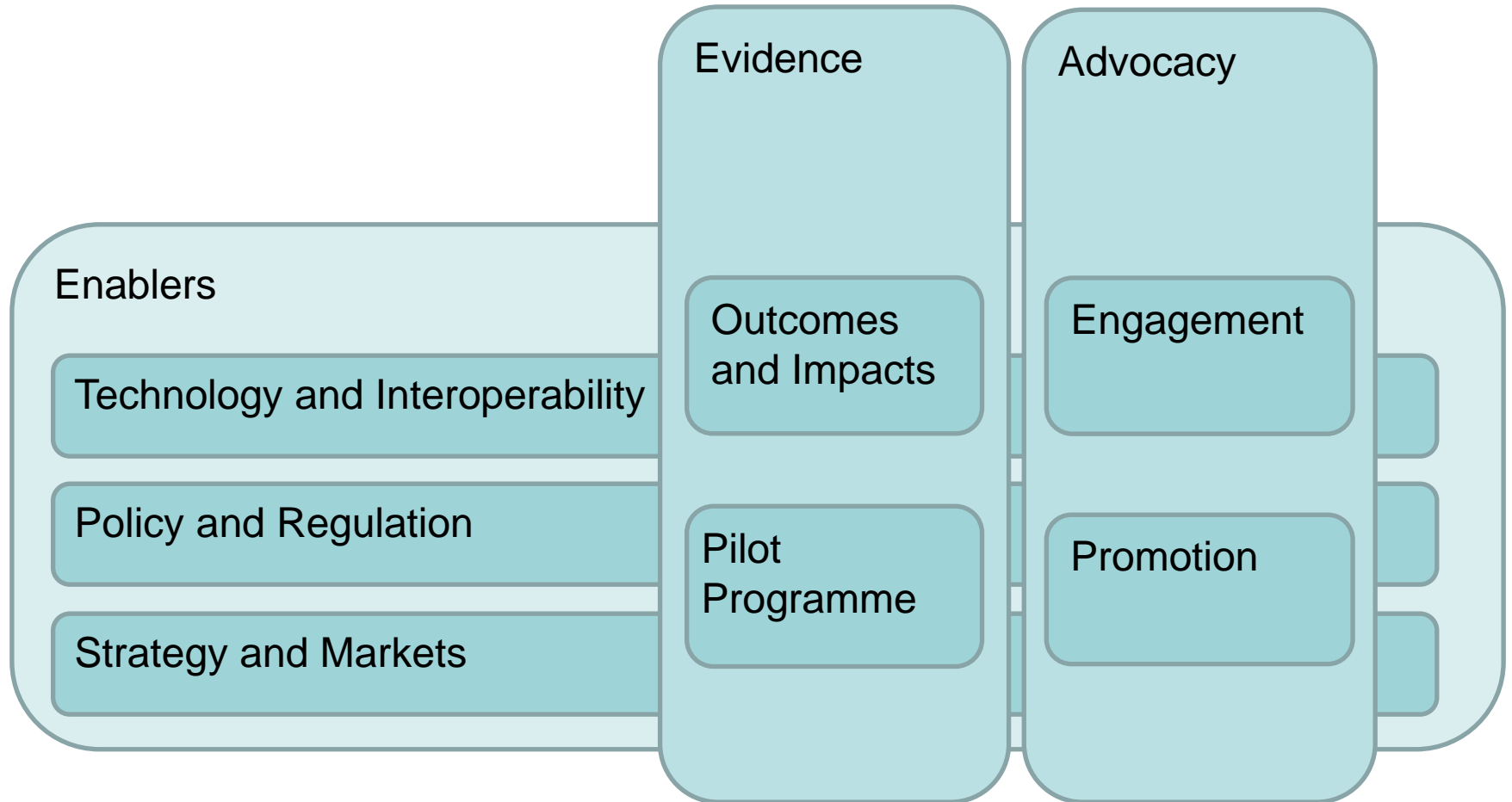
Promote Operator Assets

- Generate awareness by healthcare industry and providers on benefits of operator assets to mobile health solutions, creating the way to more services beyond connectivity in mobile health

Stakeholders Buy-in

- Create a favourable and conducive environment for the acceleration of mobile health solutions, by addressing key decision makers (payers, governments and regulators)

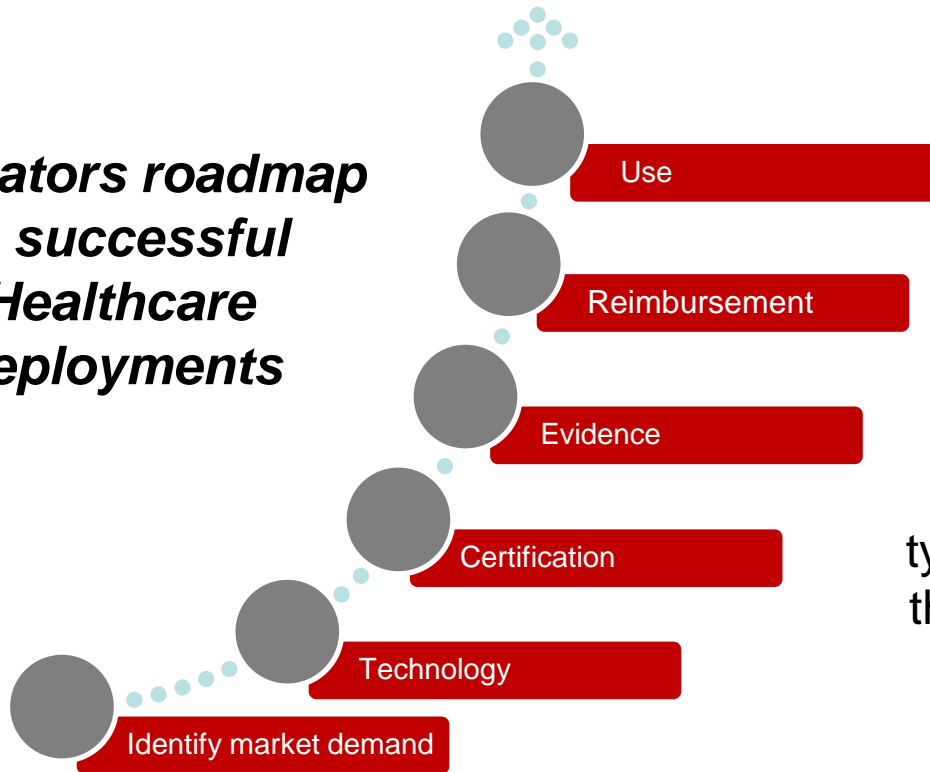
Focus of activities for



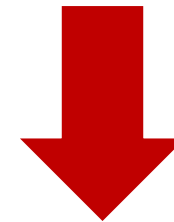
Focus on operator 'Value added services...



Operators roadmap to successful Healthcare deployments



Operators are at different stages in their development



Operators will require different types of support depending where they are in the development cycle

Market Insight
Best Practice
How to guidelines



Market Shaping
System Impact
Advocacy

...and generating system change

Mission

To reduce the cost to serve, extend reach and improve quality of care to patients, by accelerating the development and adoption of scalable and interoperable operator led mobile health solutions

Chronic Disease Programme - Diabetes

Over 346 million people worldwide have diabetes, it is forecast to double over the next 20 years. In some regions it already has prevalence levels 20 – 25%. The nature of the disease means that patients require regular monitoring, making it the perfect candidate for mobile health. Operators have identified diabetes as a key area of their strategy and are keen to collaborate to develop scalable solutions with sustainable business models. The aim is to create a Hero programme that can focus the efforts of the programme, while the background work continues. Bringing operator together to focus on a common goal, including all types of tech SMS – EM Sensor.

High level deliverables

- *Campaign Vision, scope, objectives; Diabetes summit to agree common approach; 10 operators sign up to running trials*

Regional Engagement Plans

Every region is at a different stage of their understanding and uptake of mobile health. The key stakeholders are different so if the GSMA is to have an impact it will need to tailor its engagements to the specific requirements of the region.

The regional plans will be made up of the deliverables contained with this phase of the project and ongoing activities.

Examples:

US - End user research, Engagement: Direct with FDA, Continua US policy WG, Continua Tech WG Showcase at HIMSS, etc

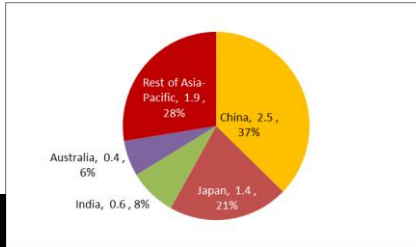
Asia Pacific



Current mHealth deployments:
Total: 111
Operator Led: 34

Expected Market size:
~6.8 billion in 2017

The Asia mHealth Market



Healthcare system: Combination of universal healthcare system and out of pocket

Government and Regulatory Awareness: varied level of awareness and activity

Approach: Country by country approach.

Planned activities					
Focus countries	Evidence	Market insight	Policy & Regulatory engagement	Technology	Events
Japan India China	<ul style="list-style-type: none"> - Track mobile operator trial programme - Promote GSMA evidence framework - Provide support on trial design 	<ul style="list-style-type: none"> - Complete End user research in India and China - Promote results with relevant stakeholders 	<ul style="list-style-type: none"> - Engagement with GSMA Spectrum team and COAI in India - Support and participate in ongoing Continua Health Alliance activities 	<ul style="list-style-type: none"> - Promote interoperability and common standards - Educational material for region 	<ul style="list-style-type: none"> - GSMA Connected Living Asia Summit
Development Fund planned activities					
<p>Qtel: Indonesia – defining market opportunity and go-to-market strategy for launching Health Hotlines</p> <p>Kuwait – defining the value proposition of Health Information Systems</p> <p>Bihar, India – ongoing work with Gates Foundation, BBCWST, WHP and Care to launch and scale services to 100 m people.</p>					



Connected Living Programme 2012/13

mHealth 2011/12 Achievements – 16 April 2012

Publications 2011/12



Understanding Medical Device Regulation for mHealth – A Guide for Mobile Operators | GSMA Medical Device Regulation: mHealth Policy and Position | Touching Lives through Mobile Health: Assessment of the Global Market Opportunity | Connected Mobile Health Devices: A Reference Architecture | The SIM: The Key to Better Healthcare | Improving the Evidence for Mobile Health | A High Level Reference Architecture for Mobile Health



Key Achievements 2011/12



mHealth

Strategy and Markets

Published global report on the \$23 billion mobile health market revenue opportunity

Agreement from Minister of Health Catalunya to support Mobile World Capital and create a test bed for mobile health services

Launched global mobile health University challenge with 26 university participating and entries from MIT, Berkeley and Oxford

GSMA mHealth services and device deployment trackers launched, now tracking 569 worldwide deployments

Analysis of the key challenges faced by the stakeholders that have deployed mHealth

Publication of 9 new mobile health case studies

Policy and Regulation

Achieved a joint position on medical device regulation with Continua Health Alliance

Engaged in EC 2012-2020 eHealth strategy programme and submitted consultation response

Roundtable held with key regulatory stakeholders in Brussels including EC representatives

GSMA educational material on medical device regulation

Built relationships with COCIR, EUCOMED

Technology and Interoperability

Joined Industry Advisory Board to EC Renewing Health Programme (£14m programme/14 projects in 9 EU countries)

Gained agreement for mobile use cases to be accepted into 2013 release of Continua guidelines

Successfully lobbied for a Mobile Operator to be made chair of Continua Technical working

Built relationships with HIMSS and participating EU mHIMSS working group

Develop positions with the working group on the role mobile operators can play in mHealth solutions, how their assets can be leveraged and the role of the SIM (UICC)

Evidence

Launched analysis of available evidence for mHealth in healthcare research and published guidance on the approach that should be used in significant health economic and clinical evidence for mHealth solutions

Invited to join NIH evidence generation programme

Invited to join 2 MNO trial teams to provide support and guidance where possible.



Connected Living mHealth – Diabetes

25 April 2012 - Seoul

- There is an ever growing burden of unsustainably rising healthcare costs across the world
- Healthcare expenditure forecast to reach some \$6 trillion by 2011.
- The healthcare market is increasingly becoming a financial drain on most economies in the world
- Healthcare costs are expected to outpace GDP growth and absorb 15-25% of OECD countries' GDP.
- This will lead to a situation that is unsustainable and likely to result in market structure breakdown and system reform. (G20 warned by standard & Poor of credit downgrade if not addressed)

Financial burden on healthcare provision demands innovation

Diabetes Facts



- 346 million people worldwide have diabetes, In some regions it already has prevalence levels 20 – 25%.
- In 2004, an estimated 3.4 million people died from consequences of high blood sugar
- More than 80% of diabetes deaths occur in low- and middle-income countries
- WHO projects that diabetes deaths will double between 2005 and 2030
- Healthy diet, regular physical activity, maintaining a normal body weight and avoiding tobacco use can prevent or delay the onset of type 2 diabetes.
- Diabetes required frequent monitoring on a frequent basis, daily it not more.

A major non-communicable disease and growing, with huge impact on resources

Diabetes device market



- The global market for products in the management of diabetes currently stands at \$41 billion
- Set to grow to over \$114 billion by 2018.
- Products include glucose meters, lancets, test strips, continuous blood glucose meters, insulin, insulin pumps, syringes
- The most significant growth will come from continuous blood glucose monitors, which provide significantly added clinical benefit at only a modestly higher cost compared to standard blood glucose meters.

Solutions across the Patient Pathway

Wellness & Prevention

Diagnosis

Monitoring

Preventions of the onset of the disease

- Life style management
- Diet and weight management
- Exercise management

Diagnosis of the disease

- Health tips for diagnosis and health information
- Self test kits

Monitoring and management of the disease

- Treatment coaching
- Smart Devices and applications for
- Medication refill

Solutions across the Healthcare systems

Multiple touch point opportunities for mobile providers

Real market example of the opportunity



US diabetes market forecasts between 2010 – 2020

Americans with diabetes 2010

\$26 Million

Americans with diabetes projected in 2020

\$39 Million

Americans with prediabetes 2010

\$79 Million

Americans with prediabetes projected in 2020

\$96 Million

Total US healthcare spend in 2010

\$194 Billion

Total estimated US healthcare spend in 2020

\$500 Billion

Estimated total US spend on diabetes-related care over the next decade

\$3.40 Trillion

Sources: Centers for Disease Control and Prevention and UnitedHealth Group's Center for Health Reform & Modernization Report: "The United States of Diabetes: Challenges and Opportunities in the Decade Ahead"

Diabetes programme structure



- **Develop a mobile operator community to accelerate mHealth in diabetes**
- **Diabetes knowledge sharing between the mobile ecosystem**
- **Diabetes stakeholder analysis and engagement**
- **Development of industry tools**
 - **Collect common evidence**
 - **Provide examples of best in class app and device/solutions**
- **Identify key barriers where industry level engagement will benefit**
- **Host a diabetes summit to bring mobile ecosystem in partnership with the diabetes community**

Any Questions