

E X C E R P T

Health Check: Key Players in Mobile Healthcare

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Report Title: Health Check: Key Players in Mobile Healthcare**Author:** Denise Culver, Analyst at large**Pages:** 44**Exhibits:** 19

By all accounts, global healthcare is in crisis. By the end of 2010, the world will spend around \$6 trillion on healthcare, with almost \$200 billion going to management of chronic diseases like diabetes and asthma. Meanwhile, there is a global deficit of 2.4 million healthcare workers and there are only 11 million hospital beds worldwide. Such statistics paint just a small picture of why governments, healthcare providers and insurance carriers are desperate to develop solutions that lower costs and improve patient care.

Mobile health (mHealth) is increasingly being touted as just such a solution. MHealth encompasses a broad range of solutions that sit at the intersection of the healthcare and telecommunications industries. MHealth is the delivery of health-related services and information via telecommunications networks, such as CDMA, GSM and Wi-Fi and devices ranging from smartphones to blood glucose meters.

In *Health Check: Key Players in Mobile Healthcare*, Pyramid Research analyzes trends and strategies related to mHealth, which include how emerging and conventional technologies are being used to improve access to and results from healthcare in both developed and underdeveloped countries. It analyzes technological and behavioral trends for using mHealth technology on a wide variety of devices, describes the latest devices and software for delivering and distributing mHealth content and services and provides case studies that detail current mHealth applications. Developments and opportunities related to the growth and implications of mHealth applications and services are also discussed in the report.

Health Check: Key Players in Mobile Healthcare is an up-to-the-moment overview of the emerging mHealth market, focusing on a variety of conventional, hybrid and new technologies that are creating new business models.

Key findings

The main conclusions of the report include:

- According to McKinsey, about 70% of people worldwide are interested in having access to at least one mHealth application, and they're willing to pay for it. Much of the resistance toward mHealth applications thus far has centered around costs – the costs of developing the services, educating healthcare providers, patients and payers about them and how to justify such costs for reimbursement purposes. MHealth gives telecommunications and technology vendors a potential customer base that's large, global and willing to spend money.
- Technology and telecommunications providers are well positioned for developing, extending and marketing mHealth applications. Many of these players already have established relationships with healthcare providers and payers, and many benefit from large, global scale. Additionally, they possess technology capabilities and consumer-brand assets that healthcare players lack. Also important is that many already understand the distribution and go-to-market requirements of consumer-oriented devices.
- Countries with large populations and limited healthcare options (such as India and South Africa) are the most interested in mHealth. Countries with these characteristics represent a significant opportunity for MNOs, OEMs and others in the technology ecosystem because mobile phones are the predominant form of communication, as landlines are extremely limited and broadband lags behind in development.
- The value proposition of mHealth is strong, giving technology and telecommunications providers a clear role in addressing the needs of the healthcare industry. MHealth provides cost-efficient delivery to healthcare; improves patient outcomes; increases the availability and access to healthcare so patients can take ownership of the data and increase the responsibility for their own health; and increases patient access to healthcare by breaking down the barriers of time and location.
- The technology is ready but physicians and providers need to address several challenges for mHealth to become as widespread as possible. Traditionally, healthcare providers are reluctant to change technologies because of the time, cost and process alterations required. Furthermore, the healthcare industry as a whole is a slow adopter of technology, and regulatory issues often slow the process of change even more. Additionally, the security of mobile technology remains an issue, especially when combined with the sensitivity of private healthcare information.

Key questions answered

- What is the current state of mHealth?
- How can mHealth seriously cut costs for public and private healthcare providers?
- What are the obstacles facing the growth of mHealth services?
- What mHealth applications and products are emerging as market leaders?
- How do governments and private businesses work together to provide mHealth services to underserved populations?

Case studies

- mCare
- Entra Health
- Telenor
- Text to Change is Texting for Development in Uganda and Beyond
- Mobile Medicine in Mexico

Audiences

Mobile operators:

This report will show you how some of the largest, as well as some of the lesser-known, operators are leveraging mHealth services to their advantage.

Investors:

Discover the state of the market for mHealth and a multitude of opportunities for investing in this quickly emerging market.

Vendors and hardware manufacturers:

Learn how companies are partnering and competing to gain footholds and advantages in mHealth.

Medical professionals:

Get an inside look at state-of-the-art developments from around the world in how doctors, care providers, patients and pharmacists are using mHealth to reduce costs and improve care.

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Acronyms and abbreviations

Acronym	Definition
API/SDK	Application Platform Interface/Software Development Kit
BGM	Blood Glucose Meter
CDMA	Code Division Multiple Access
COPD	Chronic Obstructive Pulmonary Disease
CRM	Customer Relationship Management
CRM	Cardiac Rhythm Management
CRO	Contract Research Organization
DNR	Do Not Resuscitate
DSL	Digital Subscriber Line
EMR	Electronic Medical Record
FDA	Food and Drug Administration
GDP	Gross Domestic Product
GPS	Global Positioning System
HIPAA	The Health Insurance Portability and Accountability Act
M2M	Machine to machine
mHA	Mobile Health Alliance
MIP	Mobile Information Platform
PEPFAR	President's Emergency Plan for AIDS Relief
PHR	Personal Health Record
PRO	Patient Reported Outcome
SMS	Short Message Service
TBI	Traumatic Brain Injury

Companies mentioned in this report

3Ci	HealthVault	RMD Networks
ABT Associates	IBM	Royal Philips Electronics
Amcom	Inspire	Samsung
American Telecare	Intel	Sharp
Apple	Kaiser Permanente	Sony
AT&T	KORE Telematics	Sorin Group
Best Buy	Mach Communications	Sprint
BodyMedia	McKesson	Telefonica
BT	MedApps	Telcare
Calgary Scientific	Medtronic	Telenor
CardioNet	Microsoft	Telstra
Cisco	Motorola	T-Mobile
Continua Health Alliance	mVisium	Tracfone
Cox Media	Nonin Medical	Tunstall Group, The
CSE Healthcare Systems	NowPos	UN Foundation
DataDyne	Nuffield Health	US Army
Dell	Omron Healthcare	Verizon
Diversinet	Oracle	Vignet
Dossia	Orange	Vitalograph
Entra Health Systems	Panasonic	Vodafone
Epocrates	Partners HealthCare	Walgreens
Ericsson	PatientKeeper	WebMD
First DataBank	Polar Electro	Welch Allyn
FitLinx	PHT	WellDoc
GE	ResMed	World Health Organization
Global Care Quest	RAND	Zensys
Google	RIM	

About the author

Denise Culver is the author of *IP Services Insider* and contributes to *Heavy Reading Insider*, focusing on implementation of business-class services. Denise began her career in technology journalism in 1996, serving most recently as markets editor of *The Net Economy*, a biweekly publication that covered the North American service provider market. Prior to that, she was a freelance writer for *Interactive Week*, *tele.com*, *Wireless Review*, *Intelecard News*, *Perspectives on Public Communication* and other technology and trade magazines. She is a past winner of the American Business Media Association's Jesse Neal Award for editorial achievement and a graduate of Texas A&M University.

Related resources

Recent reports and other products from Pyramid Research

[mHealth Gains Popularity and Complexity as Mobile Penetration Climbs in AME](#)

Telecom Insider published December 2010

Services carried over wireless infrastructure are playing an important role in narrowing growth inequalities for Africa and the Middle East, since they can reach communities that would otherwise have been excluded from development. As networks expand and higher-capacity technology becomes available, mHealth applications will grow in complexity and reach. We expect complex applications with higher technology requirements to become more prominent in Africa as deployment of 3G networks in the region increases. Pyramid projects a 40% rate for 3G penetration of mobile subscriptions by 2015 in the AME region. The availability of low-cost smartphones will take mHealth and other mobile applications for development into a new stage. Innovative solutions will bridge the literacy and language gaps and therefore widen the possible uses of mobile applications in the health sector.

[Mobile Agriculture: A Development Imperative for MNOs and Farmers Alike](#)

Telecom Insider Report published November 2010

Mobile agriculture (m-agriculture) applications are a growing area of interest in the AME (Africa & the Middle East) region. As mobile penetration increases in the AME region, so does the opportunity for operators to offer additional value-added services. For economies in the developing world that still rely heavily on agricultural production, including many in the AME region, productivity and efficiency in the agricultural sector are often crucial to a country's stability. The volatility of global food prices is a continuing concern, and when pricing transparency and information on the supply of crops are unavailable or inaccurate, food security can become threatened by panic buying and hoarding. Although it is still too early to document the direct impact it will have for mobile network operators, the experience with other applications in the region leads us to believe that m-agriculture will contribute to lower churn rates, increased network traffic and increased loyalty.

[Mobile Financial Services in Africa: MNO Business Models and Market Forecast](#)

Research Report published October 2010

The success of M-Pesa in Kenya has demonstrated that mobile financial services can benefit mobile operators and can also provide benefits to the ecosystem, including banks, the distribution network, merchants and companies. Moreover, because there are important social and economic benefits to mobile financial services, governments and international institutions are encouraging their development. At the same time there are important issues and challenges that need to be addressed. This report provides in-depth, up-to-the-moment analysis of mobile financial services in Africa, focusing on the offerings from major market players such as Safaricom and Vodafone.

[Analysis of Telecom Services Demand and Revenue Opportunities 2009-2015: Global Outlook and Regional Highlights](#)

On-demand Webinar recorded August 2010

Pyramid's research managers discuss Pyramid's global projections for the period 2009-2015 covering fixed and mobile demand indicators, leveraging data from Pyramid's most recent publication of telecom services forecasts (2Q10) and corresponding regional Insights. Includes key trends in four geographical regions: Americas, Europe, Africa & Middle East and APAC and a Q&A Session with Pyramid's Regional Managers and Research Directors.

[Healthcare Programs in Emerging Markets: Opportunities for Mobile Operators](#)

Africa and Middle East Country Intelligence Report published October 2009

Evidence of the impact of mobile technologies in social programs in the AME region is growing. A prominent example is Project Masiluleke in South Africa, which is raising awareness of HIV/AIDS and reminds sufferers of treatment sessions via SMS alerts. This program is to be introduced in other countries, but it will also be replicated for other diseases, such as tuberculosis. Pyramid Research looks at the role of mobile network operators and vendors in social programs, in particular healthcare, referencing many examples throughout, mostly ones from Africa and India. Going into more detail, case studies examine four of the most prominent and successful programs – in Nigeria, Uganda, South Africa and India, all focusing on the HIV/AIDS epidemic. Our analysis highlights the benefits to operators and vendors of becoming involved in such projects. These include the overall industry growth resulting from governments and NGOs investing in various initiatives as well as the opportunity to advance new services as users grow increasingly aware of applications beyond voice.

Additional products

Forecasts

Updated on a quarterly basis, our Forecast products provide a complete picture of demand trends affecting each geographical market covered. The Excel output includes five years of historical data and five years of market projections, providing complete macroeconomic and market-sizing information. Available for: Fixed Communications, Fixed Market Shares, Mobile Communications, Mobile Data, Mobile KPIs, Mobile Handsets, Media.

Country Intelligence Reports

Country Intelligence Reports offer insightful analysis of a country's communications, media and technology industries, including regulatory pressures and overall competitive landscapes.

These data-intensive reports are published annually for 60 countries worldwide, and illustrate key trends within given markets, making them an excellent complement to our Forecast products.

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About Pyramid Research

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