Strategic Intelligence Monitor on Personal Health Systems

The Strategic Intelligence Monitor on Personal Health Systems (SIMPHS) project is a multi-annual research project carried out in cooperation with DG INFSO aiming to facilitate the understanding of the market and innovation dynamics of Personal Health Systems.

In the first phase, SIMPHS1 (2009-2010) investigated Personal Health Systems (PHS) and more specifically Remote Patient Monitoring and Treatment (RMT) from a market/supply side perspective. The overall aim of SIMPHS1 was to assess the impact of wider deployment of RMT on healthcare systems in Europe and on the EU economy as a whole.

The scope in SIMPHS2 (2010-2012) has then been extended to cover Integrated Personal Health and care Services (IPHS) both from a supply and demand side perspective, which has helped identify promising trends towards the implementation of ICT-supported Integrated Care in the EU.

Market findings

- IPHS is a small market compared to eHealth overall.
- Data evidence suggests that IPHS is growing, especially in the area of RMT & mHealth.
- UK & Germany are leading in terms of Telehealth market revenues, followed by Italy and France.
- Strong drivers for Telecare but lower market value; high penetration of 1st generation Telecare in some EU Member States (MS): DK, NL, UK.
- mHealth is a game changer with a booming Apps market.
- IPHS as a dynamic ecosystem of diverse companies; alliances & partnerships key for success (due to complexity & investment required).

Demand side - Citizen panel survey in 14 EU MS – 14.000 users

**ICT Access & ICT for Health Motivation, Readiness & Impact (Life events)**

**Young individuals** already use ICT for health mostly in relation with wellness and healthy life style: this opens up a world of possibilities for health promotion and prevention.

**Middle age individuals** are also active users of ICT for Health, acting as gatekeepers in the household and thus becoming enablers for both the elderly and the young in the household.

For both, health status is a key driver

**The elderly** use ICT for Health for information and communication purposes (not services), thus missing out on effectiveness of ICT for health for cure and chronic conditions.

Among the elderly population the healthy elderly are more likely to use ICT for health and may ask for new solutions.
Demand side - Country studies in 8 EU MS, 31 initiatives analysed

Key facilitators towards Integrated Care:

- Reorganisation of services
- Policy commitment and governance mechanisms
- Incentives and financing
- National investments and funding programmes
- Interoperable systems
- Patient focus and champions and engaging professionals

Conclusions and next steps

- Technology is not the issue, the issue is about re-organisation of care (10% / 90%).
- However, for this, interoperability is key.
- IPHS is more likely to be deployed in countries where policy towards integrated care, incentive frameworks and funding mechanisms are in place.
- There is a need to look at demand (users and patients) and raise awareness.

Amongst the 31 initiatives studied it is clear that there is a need to define a common monitoring and assessment framework. Such a framework could combine different indicators to enable decision makers to assess both the state of maturity and the readiness for scaling up. It would represent a basis for knowledge and evidence as well as enable better international comparisons of performance.