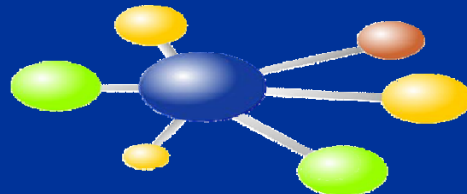


# Market analysis for strategic telemedicine applications



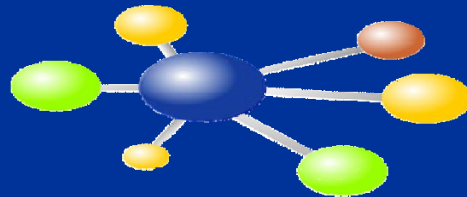
John Oates  
SPEX Conference  
Barcelona 31<sup>st</sup> January 2006

SPEX  
SPreading EXcellence in healthcare

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- The market for SPEX
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- Summary

What market are we  
talking about?



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## What market are we talking about?

- Telemedicine is a tool, but a powerful one that supports re-engineering of healthcare processes
- Telemedicine applications apply a portfolio of telemedicine tools to a particular healthcare domain.



What market are we talking about?

# Telemedicine services

	<i>Tele-counselling</i>	<i>Tele-consultation</i>	<i>Virtual referral</i>
<b>Video conference</b>		<b>X</b>	<b>X</b>
<b>“White boarding”</b>		<b>X</b>	
<b>Messaging (with images)</b>	<b>X</b>		<b>X</b>
<b>Shared EHCR</b>	<b>X</b>	<b>X</b>	<b>X</b>

## What market are we talking about?

- Networks of Excellence
  - Centre of Excellence
  - Points of Care
- These can operate at almost any level:
  - From specialist at district hospital to specialist at tertiary hospital
  - From nurse / GP to specialist at district hospital
  - Possibly even nurse to GP

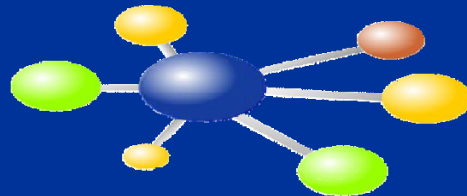


## What market are we talking about?

- Networks of Excellence tend to operate on a specialty basis, e.g.:
  - Cardiology
  - Problem wounds
  - Diabetes
- Note that a hospital with a Centre of Excellence in one specialty can be a Point of Care in another



# The market for SPEX



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## The market for SPEX

- The market for SPEX is the sub-set of the total healthcare market which can benefit from (... and can hopefully sustain!) a close collaboration between different levels of healthcare providers



## Size of the market

- Italy
  - 31 hospitals officially recognised as Centres of Excellence in a particular specialty. But more are unofficially recognised
  - 1,265 hospitals\*
  - 16,000 ambulatory facilities

\* This figure only includes public hospitals or private ones working within the public care scheme



## Size of the market

- Sweden
  - 8 university hospitals (in 6 regions)
  - 75 hospitals
  - 1,050 GP surgeries
- Spain
  - 775 hospitals
  - 2,400 basic health zones (primary care)



## Market value

- Italy (private)
  - Amount of the annual fee that private healthcare outlets are ready to pay in exchange for the services offered by CCM and the “CCM Accredited Centre” label
  - Pay-per-use charge for those services which lend themselves to this charging method
  - Other sources of revenues for the CoEs (e.g. case mix improvement)



## Market value

- Italy, Spain and Sweden (public)
  - Number of cases which can be more efficiently treated through clinical paths split between CoE and the Points of Care for the various pathologies covered in the Network of Excellence
  - Cost savings per case obtained through a more rational use of the resources available at the CoE and at the PoC



# Constraints on the market



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## Constraints on the market

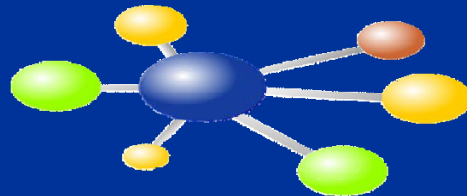
- Legal and quasi-legal
- Reimbursement models / process
- (Attitudes of persons involved)

But not

- Technology



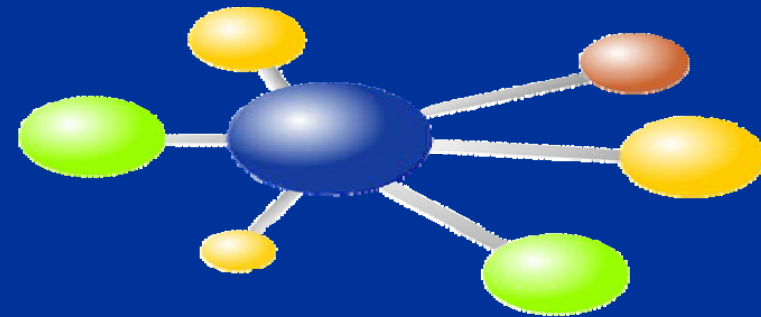
# Summary



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# Summary

- The market is limited only by your imagination
- The Network of Excellence concept can be used to restructure specialist healthcare provision
- The Network of Excellence concept can be used in both a national healthcare context, and a private / liberal healthcare context



SPEEX

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