Az eHealth jövője az egészségügyi értéklánccban
I think the biggest innovations of the 21st Century will be the intersection of [health, medicine]... biology and [digital] technology. A new era is beginning...
Közvetített műtét?
Távsebészet
A kognitív felhő

**One Year Later** Watson by the Numbers

- 15 million viewers watched the rerun of Watson’s triumph on Jeopardy!
- 5 members of Congress competed against Watson
- 386 universities are collaborating with IBM on Watson and analytics
- 34 million potentially benefiting from Watson through WellPoint health plans
Mikro elem

Wireless Implantable Medical Devices

- Deep Brain Neurostimulators
- Gastric Stimulators
- Foot Drop Implants
- Cochlear Implants
- Cardiac Defibrillators/Pacemakers
- Insulin Pumps
EKG polo
Mire használjuk?

BIOSENSING WEARABLES LANDSCAPE

GROWING LONG TAIL

Source: Rock Health review of 75+ companies (companies are selected, not comprehensive)
Venture funding of digital health continues to significantly outpace traditional healthcare sectors

DECLINING HEALTH
Year over year change in venture capital funding (2013 versus 2012)

- ALL SECTORS: 7%
- SOFTWARE: 27%
- DIGITAL HEALTH: 39%
- BIOTECH: 8%
- MED DEVICE: -17%

Source: PwC MoneyTree; digital health data based on Rock Health analysis.
Note: Digital health only includes deals > $2M.
The six major themes of 2013 comprise almost 50% of all funding for the entire year

<table>
<thead>
<tr>
<th>Category</th>
<th>Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>EHR and Clinical Workflow</td>
<td>$245M</td>
</tr>
<tr>
<td>Electronic health records and surrounding applications, including clinical workflow support</td>
<td></td>
</tr>
<tr>
<td>Analytics and Big Data</td>
<td>$161M</td>
</tr>
<tr>
<td>Data aggregation and analysis to support a wide range of health-care use cases</td>
<td></td>
</tr>
<tr>
<td>Digital Medical Devices</td>
<td>$146M</td>
</tr>
<tr>
<td>Hardware/software designed to treat a specific disease or condition</td>
<td></td>
</tr>
<tr>
<td>Wearables and Biosensing</td>
<td>$136M</td>
</tr>
<tr>
<td>Wearable consumer devices that measure specific biometrics</td>
<td></td>
</tr>
<tr>
<td>Population Health Management</td>
<td>$126M</td>
</tr>
<tr>
<td>Comprehensive platforms designed to manage the health of populations under the shift to risk-based payment models</td>
<td></td>
</tr>
<tr>
<td>Healthcare Consumer Engagement</td>
<td>$119M</td>
</tr>
<tr>
<td>Consumer tools for the purchasing of healthcare services or health insurance (B2B and B2C)</td>
<td></td>
</tr>
</tbody>
</table>

Source: Rock Health funding database
Note: Rock Health categorizes companies into 24 categories
Ki fizet a végén?
A nagyok is beneveztek
eHealth aktorai

Product Manufacturer

Physician  Payor  Patient
Az állam új kihívásai
Mai beteg = user

Withings

fitbit

RunKeeper

patientslikeme

CureTogether

eHealth
Orvos = user
A pharma evoluciója

Drivers of change:
- R&D productivity
- Patent cliff
- Globalization
- Demographics
- Pricing & reimbursement
- Health care reform
- Health IT
- Consumerism
- Value mining

Business Models:
- Pharma 1.0: Blockbuster drugs
- Pharma 2.0: Diversified drug portfolios
- Pharma 3.0: Healthy outcomes

Customer:
- Physician
- Payor
- Patient
Digitális Pharma
Top 20 App Makers (# of apps)

Source: Pocket.md as of 12/2/2013

- Bayer: 139
- Merck: 111
- Novartis: 108
- Pfizer: 62
- Janssen: 45
- AstraZeneca: 44
- GlaxoSmithKline (GSK): 41
- Roche: 41
- Johnson & Johnson: 39
- Novo Nordisk: 32
- Siemens: 29
- Amgen: 28
- Medtronic: 27
- Merck: 20
- Biogen Idec: 20
- Merial: 20
- Sanofi-Aventis-Pasteur: 20
- Genentech: 19
- Allergan: 17

11.2% of total
Az új gyógyszer

The transformation from the present medicine to the individualized medicine that is enabled by digitized humans

New medicine

Wireless sensors
Genomics
Imaging
Information system

Convergence

Old medicine

Mobile connectivity + bandwidth
Internet
Social networking
Computing
Perszonalizált terápia
eHealth aktorai

Product Manufacturer

Physician ↔ Payor ↔ Patient
Köszönöm a figyelmét!

A kockázatokról és mellékhatásokról kérdeze meg a