



European
Commission

Large-scale sustainable deployment of digitally-enabled innovation for health and care delivery to the ageing population



Executive Summary

A study prepared for the European Commission
DG Communications Networks, Content & Technology
by European Connected Health Alliance (ECHAlliance)



This study was carried out for the European Commission by

European Connected Health Alliance (EChAlliance)

CIC N° NI 610694

The Innovation Centre

Northern Ireland Science Park

Queen's Island, Belfast, BT3 9DT

Northern Ireland (United Kingdom)

www.echalliance.com

Author: Julien Venne, Strategic Advisor



Internal identification

Contract number: 30-CE-0818053/00-08

DISCLAIMER

By the European Commission, Directorate-General of Communications Networks, Content & Technology.

The information and views set out in this publication are those of the author(s) and do not necessarily reflect the official opinion of the Commission. The Commission does not guarantee the accuracy of the data included in this study. Neither the Commission nor any person acting on the Commission's behalf may be held responsible for the use which may be made of the information contained therein.

ISBN 978-92-79-92858-1

doi:10.2759/032021

© European Union, 2018. All rights reserved. Certain parts are licensed under conditions to the EU. Reproduction is authorised provided the source is acknowledged

Executive summary

The goal of the European Commission is to achieve more than 50 EU regions actively deploying and implementing large-scale, sustainable, digitally-enabled innovative solutions for active and healthy ageing (AHA), improving the lives of at least 4 million citizens by 2019. For the European Commission's goals to be achieved, it is necessary to pursue joint collaborative efforts across different multi-stakeholders' organisations that can maximise efforts and achieve large-scale, sustainable deployment of digitally-enabled innovative solutions for improved health and care delivery to the ageing population.

The first objective of this study has been to create a "**Contact group**" with several key multi-stakeholders' organisations involved in the development of innovation for Active and Healthy Ageing and in the deployment and implementation of innovative solutions. This group has been meeting early 2017 in order to discuss the situation of investments in digitally-enabled innovative solutions for AHA, and the approach around the launch of a survey aiming to quantify and qualify these investments across Europe.

Secondly, a survey with 2 phases has been designed:

- **an online questionnaire** tracking the committed and planned investments;
- **a series of interviews** with organisations usually purchasing care products and services for the ageing population.

The information about the online survey has been circulated through the networks of the European Commission, but also of the contractor, European Connected Health Alliance (ECHAlliance), and the members of the Contact group. **A multi-channels communication plan** has been deployed, targeting specifically the stakeholders participating to the European Innovation Partnership on Active and Healthy Ageing (EIP on AHA) and its Reference sites.

41 completed responses have been submitted online. However, a large majority of these applications has been submitted by suppliers showcasing their own solutions for AHA, which was not eligible to the present study. After applying the eligibility criteria, the survey has allowed the identification of **18 procurements** (committed or planned for the years 2017 and 2018) from 11 different organisations.

The main characteristics of these investments are:

- By public entities and non-profit organisations purchasing health products and services for the public sector;
- Areas of interventions covering the 6 topics of the 6 Action groups of the EIP on AHA, with a majority of the expected solutions targeting integrated care and chronic disease management;
- 61% of the investments are under 1 million euros, around 20% above 3 million euros;
- Most of the targeted solutions could cover a large spectrum of the population (not only age-related conditions);
- 50% of the investments forecast interventions in population of more than 1 million people;
- In terms of expected outcomes of the purchased solutions, the most frequent answer is around the empowerment of patients for the self-management of their health condition, the reduction of costs being only ranked 9th.

Through **individual interviews**, we have looked for qualitative information about these investments but also about the reasons preventing some regions or local authorities from purchasing digitally-enabled solutions for AHA. The low number of tracked investments in phase 1 of the survey demonstrated that, if most of the EU regions have defined strategies which (almost all) include digital technologies to tackle health and ageing challenges, the operationalisation of it by public procurements is still limited. **The part of the budget dedicated to solutions integrating digital technologies is still relatively low (0-3%).**

However, the interviewees recognised that their local strategies clearly identify **digital technologies as a way to cope efficiently with the current large population challenges** (chronic diseases, ageing). In several cases of investments, the digitally-enabled solutions are procured via the support of European structural funds.

The purchasing organisations representatives **identified several barriers** preventing them from triggering public procurements for digitally-enabled solutions for AHA:

- Difficulty to identify which are the digitally-enabled solutions available on the market and to obtain reliable information about them;
- Available digital solutions on the market have limited scopes and are difficult to integrate to the existing information systems;
- Lack of interoperability (need for an EU framework);
- Lack of openness of the (proprietary) solutions for data sharing among the health and care providers and for the 2nd use of data for research and innovation purpose;
- The digital gap for ageing population still remains;
- The purchasing organisations usually prefer tailor-made solutions and decide to develop their own ones (doing specific development and not purchasing standard solutions available on the market);
- Lack of high broadband internet services;
- Lack of user-friendly solutions;
- Cultural change required in purchasing information, health and care professionals and citizens;
- Risk associated to innovation.

The lessons learnt through this survey have led to the definition of **a series of specific actions**, which could be developed in order to tackle these challenges as presented in the below work plan. These actions should target several dimensions of innovation:

- Innovation for a better information of the demand side about the available solutions on the market and their performance;
- Innovation for developing closer relationship and dialogue between the demand and the supply side (in particular SMEs and start-ups of the EU AHA market (including exchanges about the definition of needs, the business and contract models around innovative solution, the risk sharing));
- Innovation in favour of an implementation model of digitally-enabled solutions, starting from an identification of key success factors from countries to countries, regions to regions;
- Innovation for more integrated solutions, combining several products and services and addressing larger population with multiple health conditions;
- Innovation for open models of data exchange, allowing European health and care systems to share data among the care providers for better services to the citizens and with the research and innovation sector to enhance the EU competitiveness for Active and Healthy Ageing.

These suggestions of actions and innovation will be important inputs for the design of the **Innovation to Market (I2M) plan** of the coordination and support action **WE4AHA**. This plan will support the stakeholders from the demand side (purchasers) and from the supply side (in particular SMEs and start-ups), in order to trigger more and larger investments in digitally-enabled solutions for AHA, and to develop a mutual knowledge leading to more relevant solutions for the current needs and challenges that the EU health and care systems are facing.

European Commission

Luxembourg, Publications Office of the European Union

2018 – 7 pages

ISBN 978-92-79-92858-1
doi:10.2759/032021



doi:10.2759/032021 ISBN 978-92-79-92858-1