EPP eHealth

Synthesis of Unmet Needs

11th May 2016

optimat

EPP eHealth Overview

EPP eHealth

http://innovationithospitals.com/

Aim: to transform the market for eHealth solutions through dialogue and innovation procurement.

- The project will make progress towards this aim by creating a network of procuring organisations that understand the opportunities that eHealth can offer.

European Healthcare Challenges

EPP eHealth

- Upward pressure on the costs of providing care
- Downwards pressure on budgets, public finances constrained
- Unresolved gap between the service on offer and healthcare needs
- New challenges in healthcare….increasing hygiene and infection control issues, climate change pressures
- Changes in healthcare delivery, patient expectations and an aging population
- …etc

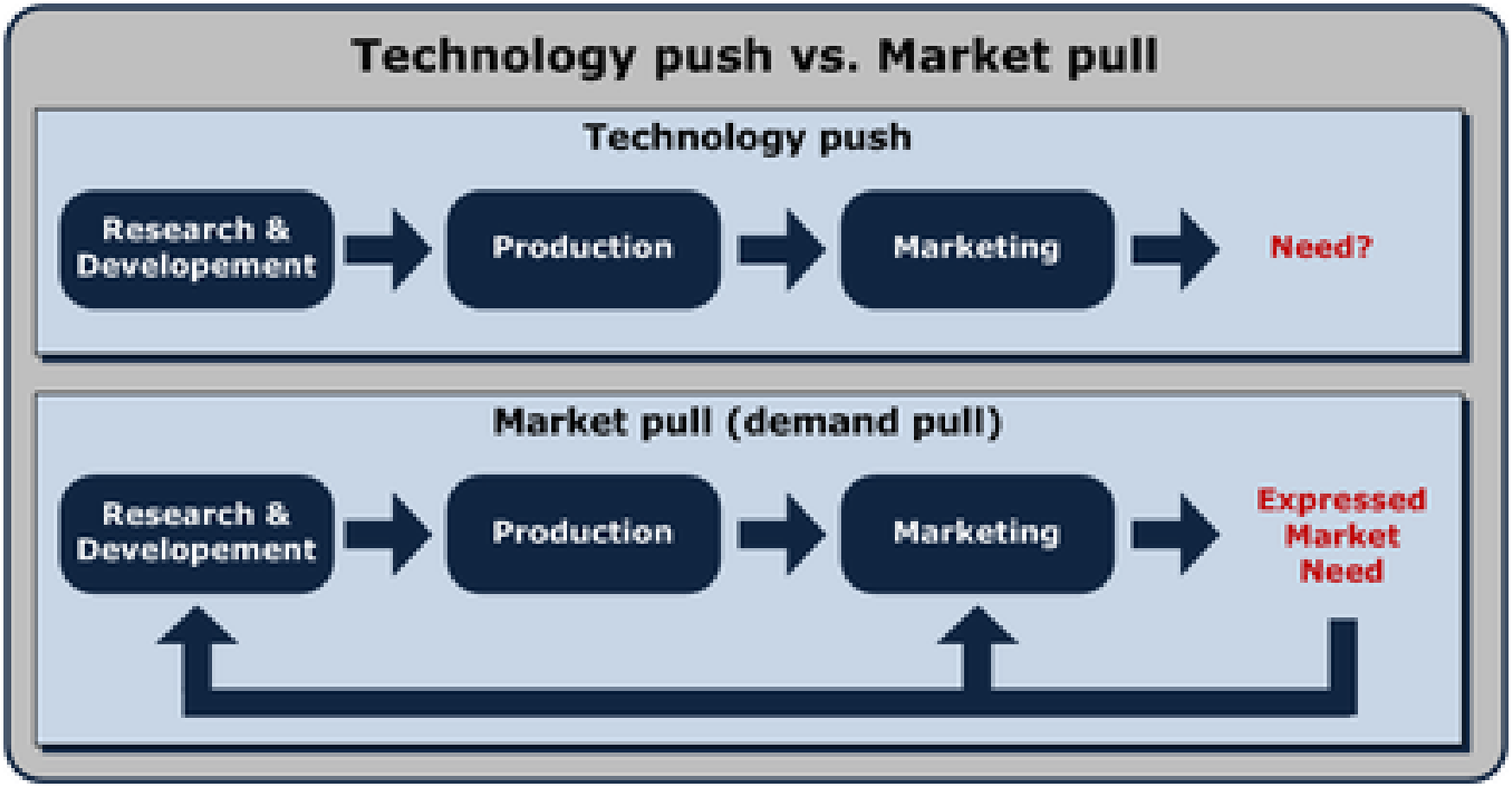
- No shortage of problems

- eHealth has the potential to make a valuable contribution to tackling some of the challenges

- Yet, to date, evidence suggests that whole sale adoption and take up of eHealth solutions has been slow and the benefits have been unrealised

Technology Push to Market Demand

EPP eHealth



The Innovation Procurement Process

EPP eHealth

1. Customers need an **accurate** understanding of their unmet and future needs

2. Customers need to **communicate** this **early** in an accurate & **convincing** way to suppliers

3. Suppliers need an **opportunity** to offer new solutions on an **equal** playing field

1. Identification → 2. Market engagement → 3. Pro-innovation procurement

Identifying Unmet Needs & Requirements

EPP eHealth

- What is the current situation?
- How would we like it to be different?
- What are the outcomes that we need?
- Would we buy a product or service if it delivered these outcomes (in a cost effective way)?
- Do other healthcare providers share this need?
- Can we present a credible demand to the market?

An *unmet need* is a problem, bottleneck or desire of functionality with no current good solution in the market or at an affordable price. It is a market gap that could be exploited to start a profitable business around it.

Accurate, Credible Requirement

EPP eHealth

- The aim is to get to a requirement that is:
  - **Genuine**
    - real need that current solutions fail to meet
    - not innovation for innovations sake
    - (sufficient demand)
  - **Accurate**
    - stakeholder consultation, get to the root
  - **Credible**
    - commitment, budget, embedding, timeframe, stakeholder buy-in
- Outcome not solution based
  - people always keen to imagine the answer rather than define the problem

"The key to success was to begin by asking for what was needed – not what we thought was available or affordable. The results have exceeded all expectations".

John Cartwright, Director of Estates and Facilities, Rotherham NHS Foundation Trust.

Unmet Needs & Requirements in eHealth

EPP eHealth

- Previous projects focused on uncovering unmet needs and were **technology neutral** and asked the supply chain to bring forward solutions e.g. Erasmus MC did not ask for a robotic bed washing facility
- In eHealth procurement 'requirements' can be:

1. ICT focused e.g. electronic management of patient records (the answer is ICT)
   - Know the answer is **ICT based** and want to know how to best deliver the outcomes

2. Unmet need focused (the solution can be anything) e.g. 'cost efficiencies and improved lifetime patient experience in the management of cystic fibrosis'
   - Wants to explore the potential of **ICT as part of a solution**

Both still need clarity on the **requirements** needed

Methodology

EPP eHealth

1st Workshop Outcomes

+

Consortium 1-2-1 Calls

+

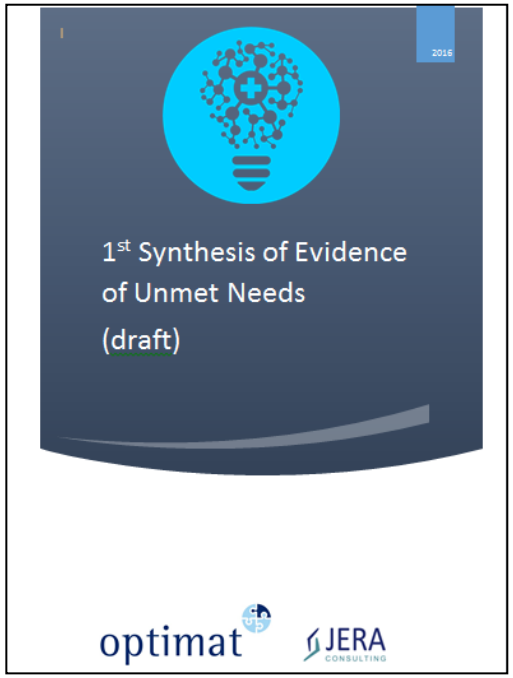
Qualitative Analysis

+

Desk Research

+

EcoQUIP Paper



Identified Unmet Needs

EPP eHealth

1. **Patient Empowerment**
   - Understanding by the patient of his/her role;
   - Acquisition by patients of sufficient knowledge to be able to engage with their healthcare provider;
   - Patient skills; and
   - The presence of a facilitating environment

2. **Patient Self Management**
   - Giving patients with long-term conditions the tools, skills and support they need to improve their own wellbeing and health.
   - The rising number of patients with long-term illness increases the need for self-management solutions.

3. **Chronic Disease Management**
   - Leading cause of mortality in Europe
   - Caring for those with chronic conditions is not about a cure, but to enhance functional status, minimize distressing symptoms, prolong life and enhance the quality of life
   - Need for management solutions to tackle this increasingly common challenge

Identified Unmet Needs (2)

EPP eHealth

4. Diagnosis Decision Making

- Particularly in relation to cancer diagnoses, but believed that timeframe solutions should be applied to other diagnoses
- Recognised at a policy level e.g. the UK Government have set cancer waiting time targets and NICE have updated GP referral guidelines
- need for a solution is further evidenced with the anticipated increase in the number of cancer patients (from 2 to 3 million by the end of the next Government in 2020 (MacMillan))

5. Ageing Population

- One of the greatest social and economic challenges of the twenty first century and it will affect all EU countries and a large number of policy areas including economy, social security, labour and healthcare systems
- Healthcare systems across Europe must be able to adapt in order to continue providing adequate levels of care whilst remaining financially sustainable

Identified Unmet Needs (3)

EPP eHealth

6. Interoperability/Integration and Standards

- Lack of universal standards-based Electronic Health Record systems adoption. Health information exchange cannot happen until EHRs are installed and operational across Europe.
- Disconnect between process and technology. Existing healthcare processes must be redesigned to incorporate new technologies. This is particularly noticeable in healthcare due to the lack of standardisation.
- Complex privacy and security challenges associated with technologies are at the forefront of healthcare institutions.
- Standards are a huge barrier to ICT adoption in healthcare. There is a need for synchronous collective action among multiple stakeholders; standards and rules for must be uniform to bridge existing and future networks.

7. Skills Shortages

- Increasingly, healthcare professionals require a relatively high level of technical know-how in addition to clinical knowledge in order to operate new medical appliances and diagnostic techniques
- Level of the workforce skills and experience of training appears to be variable across healthcare occupations
- Investment in skills is vital particularly as health professionals will need to develop new skills and competences required for new treatments and new delivery models

Project Unmet Needs

EPP eHealth

SILVER

HAPPI
HEALTHY AGEING
PUBLIC PROCUREMENT OF INNOVATIONS

Thalea

STOP
+
GO

EcoQUIP

InSPiRe
innovative methodology for small populations research

Procurement Requirements

EPP eHealth

Example: Rare Diseases

PROBLEM

- Management of rare respiratory diseases (RRD) is characterised by being relatively expensive (ref) and increasingly delivered through specialist regional centres (policy ref) . While this ensures that the level of expertise necessary for effective patient care is made available, the patient populations are in contrast geographically dispersed which necessitates patients and carers needing to travel, often significant distances, on a regular basis. This impacts negatively on the quality of life as well as incurring cost and stress to the patient and carers. In addition, effective management of RRD requires close coordination between health providers and specialities.

SOLUTION

- Effective use of eHealth, telehealth and could transform the care pathways for these patients as part of an integrated RRD management service leading to better health and lifestyle outcomes for patients and carers and cost efficiencies.

UNMET NEED

- The unmet need is for an age-appropriate integrated RRD management service that makes effective use of ehealth solutions, and operates seamlessly within the local health provision framework, leading to better care outcomes, greater patient empowerment and cost efficiencies based on TCS.

Procurement Requirements

EPP eHealth

Example: Diabetes

PROBLEM

- All around the world, diabetes is on the rise and the numbers of people with the condition and predicted to develop it over the coming years are really staggering. Currently 387 million people – that's 8.3 per cent of adults aged 20-79 – have diabetes, and the number is set to rise beyond 592 million by 2035.

SOLUTION

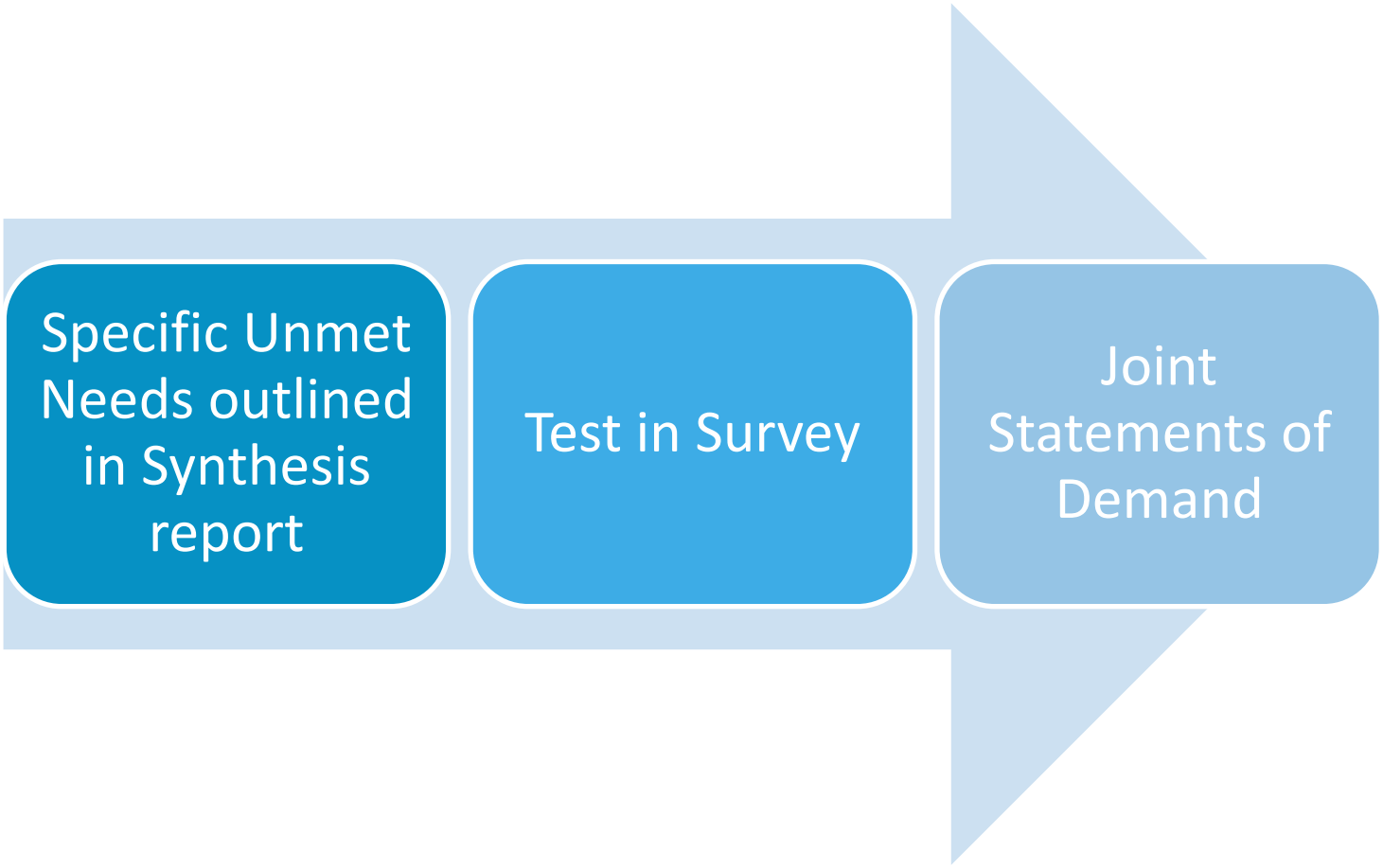
- Effective use of eHealth and ICT could revolutionise treatment for millions of diabetes sufferers across the world

UNMET NEED

- The unmet need is for alternative methods of delivering insulin that makes effective use of eHealth solutions, and operates seamlessly within the local health provision framework, leading to better care outcomes and improved diabetes management.

Next Steps

EPP eHealth



MARKET ENGAGEMENT & CONSULTATION