

Orange, driving e-health forward

Orange Healthcare spearheads Orange's new services strategy

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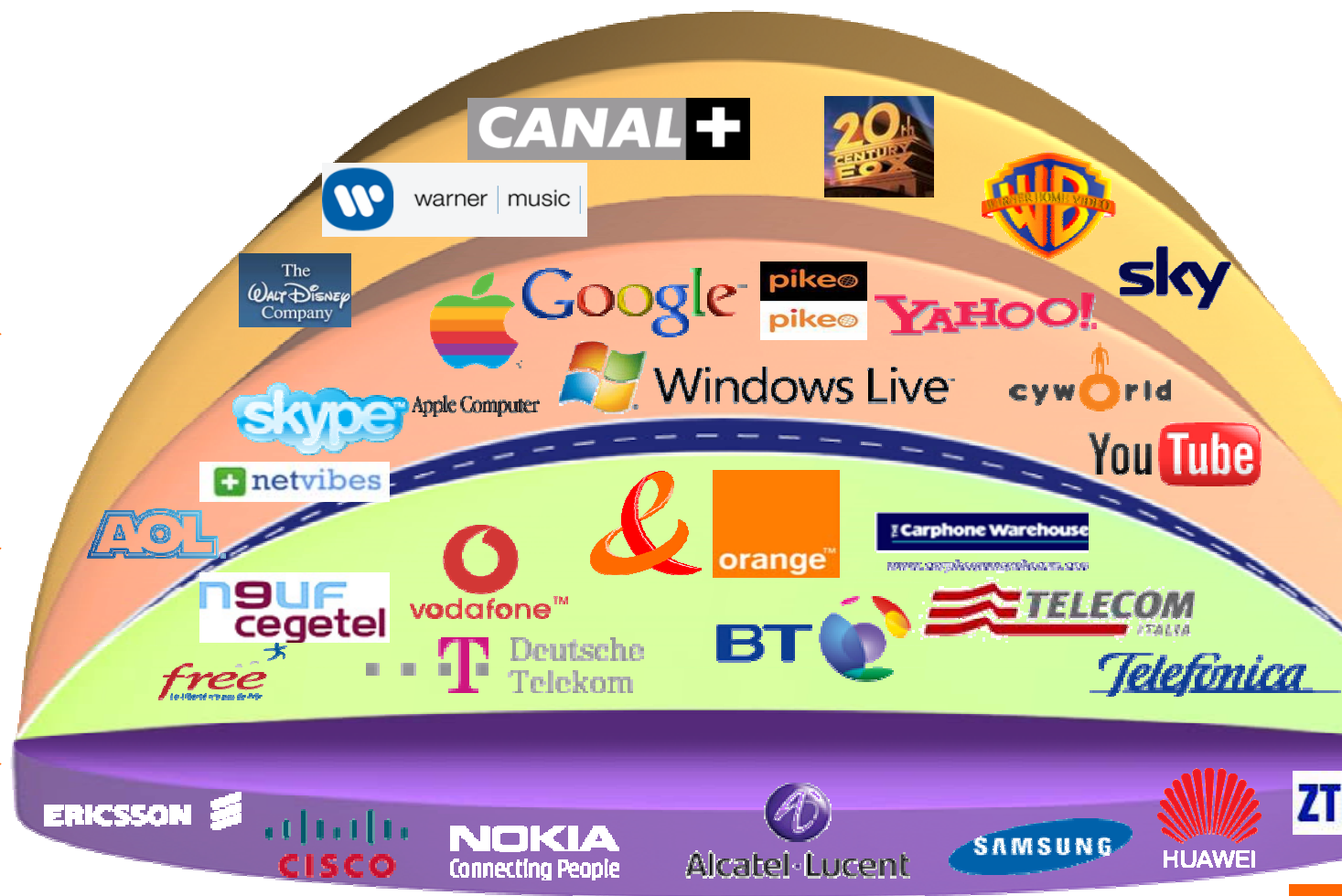


executing NExT convergence strategy to succeed in the new telco eco-system

developing new
business
models

balancing
market shares
& profitability

optimizing
costs



2 major markets addressed by Health Program

Medical services



- All medical and medical related activities
- Services to **patients**
- **Services and systems for professionals** and establishments

- **€153B market in France**

- €450B in Europe (Orange footprint)

- **Key trends:**

- Lack of medical resources and expertises
- Cost containment efforts
- Increasing Health Consciousness and Prevention
- Rise of chronic diseases

Services to Elderly and Disabled



- **At home** services

- In establishments / **home retirement** services

- **€18B market in France**

- ~€50B in Europe (Orange footprint)

- **Key trends:**

- Ageing population and increasing dependant people
- People willing to stay at home as long as possible

A favorable global context

Definition of e-health	<ul style="list-style-type: none">■ Using IT to meet the requirements of citizens, patients, care institutions and health professionals, health providers and trustees
Evolution of the health market	<ul style="list-style-type: none">■ From public funding towards greater private funding■ Doctor-centric → patient-centric■ Curative care → Preventive Care
A strong mainstay	<ul style="list-style-type: none">■ Wide availability of the Internet, mobiles and broadband
Market potential	<ul style="list-style-type: none">■ Insufficient productivity due to chronic IT underinvestment■ Annual estimated growth between 15% - 20% for the next 5 years (source: Orange European Survey)

Main lessons of the Ipsos survey

Crucial challenges

The fight against
long-term illnesses
(54% of patients/58% of doctors)

The lack of health professionals
(39% of patients and doctors)

The autonomy of dependent people
(34% of patients and 35% of doctors)

Controlling health expenditure
(29% of patients and 39% of doctors)

High expectations

- Helping the elderly and the disabled to stay out of hospital
⇒ 83% of patients and 72% of doctors
- For the remote management of chronic illness
⇒ 82% of patients and 78% of doctors
- To locate people with memory problems
⇒ 80% of patients and 62% of doctors
- To develop home hospital care
⇒ 79% of patients and 71% of doctors
- To make appointments with health care professionals
⇒ 78% of patients and 75% of doctors



e-health, a response to the new challenges of health care

3 development priorities in e-health

in hospital

- ⇒ The multimedia room
- ⇒ The hospital of the future

at the doctor's

- ⇒ Chronic Disease Remote Management
- ⇒ E-booking

at home

- ⇒ Home hospitalisation
- ⇒ Home Stay

The multimedia room and the hospital of the future

■ For the patient

- improve comfort
- guarantee safety

⇒ Multimedia services in the room (TV, Internet, VoD, telephone)

■ For the doctor and the carer

- simplify and improve the work of the medical team
- optimise the organisation of care
- guarantee the location of equipment and patients
- guarantee one's own safety

⇒ Remain in contact at all times (WiFi terminals)

⇒ Access medical records from anywhere in the hospital without losing data

⇒ Locate equipment

⇒ Locate patients

⇒ Emergency button

Chronic Disease Remote Monitoring



**7.5 million people in France
8 out of 11 main causes of
hospitalization in UK**

⇒ Collecting information from sensors or entered by the patient

⇒ Sending automatic reminders, advice, returns on vital signs

⇒ General or educational information

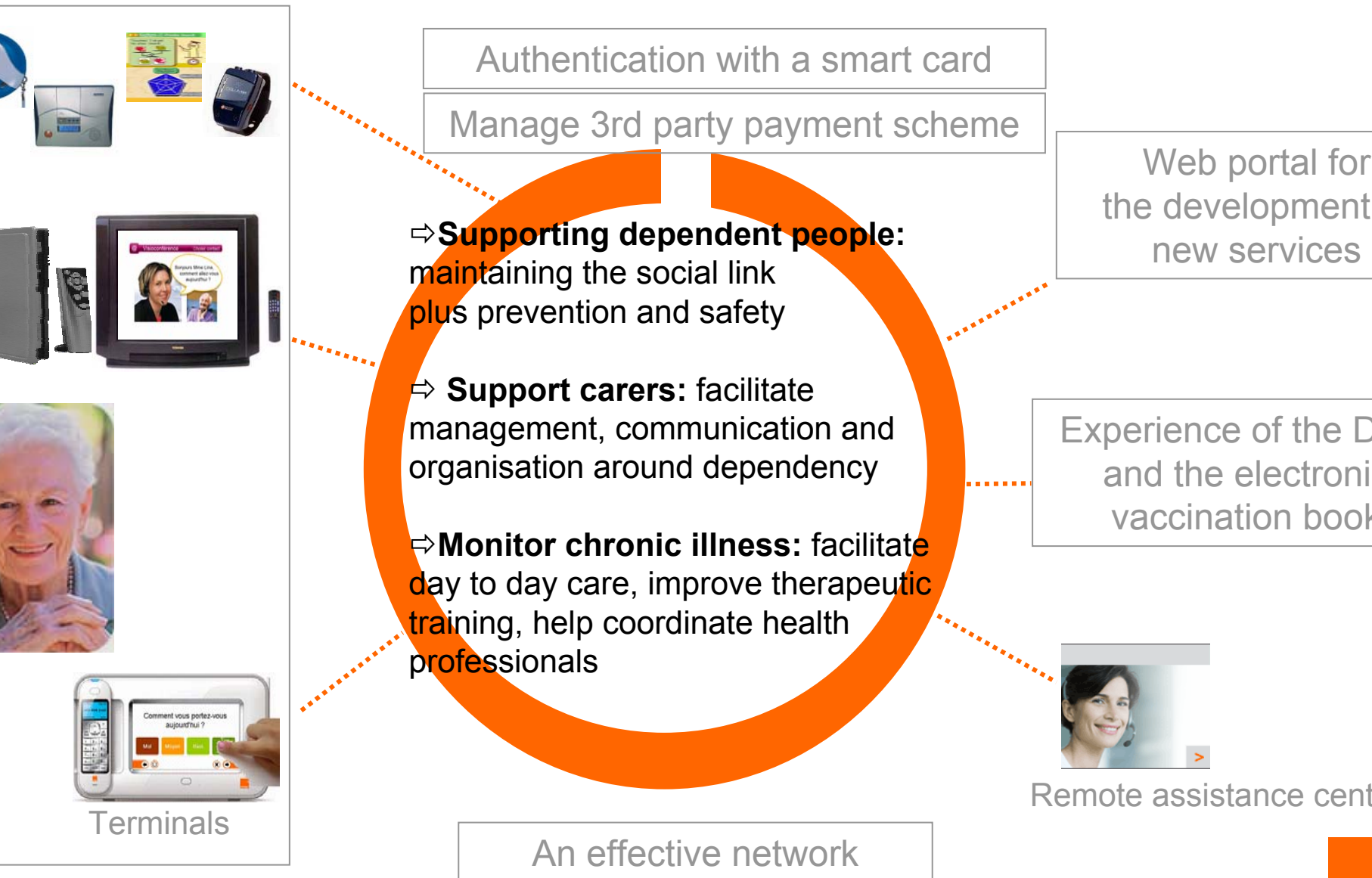


Doctor
with professional
software



Medical call centre

At home: organising around the assisted person



Orange Healthcare, a spearhead for new services

- A Health division at the heart of the Group's strategy in new services
 - A division with a global view
 - A service offer segmented according to audience
- Our assets in becoming a European leader in e-health

Trust

- ⇒ Reliable communications and terminals
- ⇒ Partners that are leaders in their sector
- ⇒ A worldwide brand

Innovation

- ⇒ R&D: Orange Labs dedicated to health with more than 10 experts
- ⇒ A major player in electronic information in the health sector in France

Proximity

- ⇒ A durable presence alongside stakeholders in the health industry
- ⇒ A sales network present in all areas where the Group operates

