a first breakdown based on usage

services for Health Professional
- mobile devices for care givers
- mobile access to HIS & clinical systems

health management
- data collection
- tele assessment
- remote monitoring

prevention and wellness
- education & awareness
- personal emergency system
- wellness & prevention
- tracking
a second opinion? just ask an economist, a physician and a Telco the differences between North and South

<table>
<thead>
<tr>
<th>Economic Divide</th>
<th>South</th>
<th>North</th>
</tr>
</thead>
<tbody>
<tr>
<td>GDP per head (k$)</td>
<td>23</td>
<td>22.8</td>
</tr>
<tr>
<td>% pop. Living with &lt; 1$/day</td>
<td>53%</td>
<td>4%</td>
</tr>
<tr>
<td>Healthcare expenditure (%GDP)</td>
<td>6.2</td>
<td>11.2</td>
</tr>
</tbody>
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<table>
<thead>
<tr>
<th>Mobile</th>
<th></th>
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</thead>
<tbody>
<tr>
<td>Mobile penetration (2009)</td>
<td>59</td>
<td>121</td>
</tr>
<tr>
<td>Average Arpu (2008)</td>
<td>12</td>
<td>36</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Health Divide</th>
<th></th>
<th></th>
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</thead>
<tbody>
<tr>
<td>Number of physicians (/000)</td>
<td>2</td>
<td>33</td>
</tr>
<tr>
<td>Expenditures covered by social security (%)</td>
<td>8%</td>
<td>50%</td>
</tr>
<tr>
<td>VIH prevalence (/ 000 000)</td>
<td>174</td>
<td>11</td>
</tr>
</tbody>
</table>

- Wellness & prevention
- Personal emergency system
- Tracking
- Mobile access to HIS
- Remote monitoring
- Tele assessment
- Mobile devices for care givers
- Data collection
- Education & Awareness
- Access
apart from mobile devices for pros, mHealth ecosystem consists of 4 layers

the key players. today on a classical devices business model

an emerging layer – lot of value, few pure players

patients

the healthcare ecosystem is pushing for cost effectiveness & security

hosting, security, transport, billing, secured third party … cloud computing

software industry & OTT

telcos

devices manufacturers
mHealth is about efficiency but also about access to health

more than 50% of mHealth revenues

services for Health Professional

health management

prevention & wellness

B2B

B2C

tele assessment

mobile devices for care givers

remote monitoring

personal emergency system

wellness & prevention
the role of mHealth in emerging countries is to help reduce Economic & Health divide
environmental conditions of success

- healthcare data standards (DICOM, HL7…) / interoperability
- data hosting and healthcare data protection
- European common regulation of data storage, hosting and circulation (vs State prerogative on health)
- labels and standards on health content quality especially for mobile applications
“It’s not enough to have a good mind, the main thing is to use it”

Descartes, discours de la Méthode