



Project Details

PROJECT COORDINATOR

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WEBSITE

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START

June 2013

DURATION

36 months

EXECUTIVE summary

With-Me project will create the With-Me ecosystem: a collection of embedded devices including multi-purpose consumer electronics, dedicated health equipment and external information sources, as well as the required computational environment supporting services and applications. The deployment on real environment pilots will deliver the evidence that people's adherence to healthier behaviours will improve by using persuasive electronic services that constitute .

MARKET INNOVATION & IMPACT

With-Me will provide consumers with a product suite that covers both health care as well as healthy lifestyle support. With-Me ecosystem ensures continuity of personalised assistance from lifestyle improvement to primary, secondary and tertiary prevention and care. Therefore, there is a clear market innovation as:

- > The integration of information management in personal information spaces reduces the digital divide
- > Through the design of products with innovative user interfaces, With-Me will enhance the user experience, easing access to different profiled persons.

R&D INNOVATION and technical excellence

With-Me aims at providing a health prevention platform and personalized services in order to improve the general health condition and to prevent occurrence from a range of diseases. For that purpose With-Me is designed around three pillars:

- > Embedded platform for multivendor nomadic sensors,
- > Interoperable intelligent sensors for wellbeing monitoring
- > Open architecture for persuasive electronic services.

The result of the With-Me project will be a customizable, adaptive, assistive and yet secure training/ supporting solution according to the way a person prefers and needs. This personalized assistant is an interoperable ICT-based application that provides, mainly, seamless guidance and promotion of physical activity both indoors (in-home, gym club) and outdoors (joy parks, open-air exercising, children's playground, nature reserves, etc.) as well as healthy life (weight, diet, sleeping habits, and stress management).

While other projects focus on a specific domain (sensors communication, knowledge gathering, etc), With-Me offers a complete (from sensors to end users) and open (standardized interface) solution and seamless integration of interoperable nomadic and home sensor devices and health services. This is achieved through technological and application innovations focused on the three pillars above mentioned.

NUMBER

01

DECEMBER
2013

NEWSLETTER ON MARKET AND TECHNOLOGY WATCH

With Me – The European Platform to Promote Healthy Lifestyle and improve care through a Personal Persuasive Assistant



The purpose of this Newsletter

With-Me Project will make a careful watch, all along the project lifetime, of emerging technologies, market and standard developments. The purpose is to gather enough information to adopt decisions or actions that a change in the environment would require. Based on the watch activities, this is the first of a series of periodic newsletter that will be sent to the Project stakeholders, thus contributing to the project dissemination and creating awareness on the project environment. The overall objective of this task is, in addition to the project dissemination, to collect and analyse market-oriented information that will be used as feedback in the specification and implementation activities, in order to support the partners' exploitation perspectives.

CONTEXT

This activity forms part of work package 6, that will lead the technical development from a business perspective. A thorough value network and market analysis, with the cooperation and input of all partners, will provide the basis for the value based approach to the development of sound business models for With-Me. The main challenge is to bridge the gap between lifestyle market and business models and those from the health care sector. This business strategy will allow to align With-Me outcomes with stakeholders need,

Issues

- With-Me wants to create an ecosystem **P.1**
- Towards market size evaluation **P.2**
- Possible exploitation Strategies **P.3**

With-Me wants to create an Ecosystem.

With-Me wants to create an ecosystem of technologies, sensors, devices, services, businesses and end-users. It could be characterized as the Internet of Things for health. A business ecosystem describes the structure and behaviour of a network of high-tech organisations that share a key technological platform and the ways individual firms can flourish in such an environment (Moore 1999).

Most of the similar cases of ecosystems for personal health services are relatively new and follow the model of the walled garden. The degree of openness is closely related to the chosen business model. With-Me aims to be more open. Therefore a governance structure is needed to manage the power between actors, openness, interoperability and quality of the ecosystem.

Rich personal data is needed to be able to provide services that motivate on the personal level. In an open system like With-Me the end-user needs to be in control of his own personal data. Probably an independent health information provider that acts as trusted third party for the individual end-user is needed.

Ecosystems are complex systems with many stakeholders. With-Me is even more complex as it wants to serve the whole 'health continuum' from lifestyle and wellness to chronic disease management. To keep the value network understandable the roles are grouped into:

- Influence
- Governance
- Back-end technology
- Front-end technology
- Service
- End-users

The market of With-Me is spanning several domains. We adopted the typology of Personal Health Systems to visualize that With-Me is positioned in the more sophisticated part and targeting the whole health continuum. With-Me will support many segments of end users but not as separate groups. With-Me will support individuals in many situations and phases of their life.

A SWOT analysis

The SWOT analysis is done to get preliminary insight in the important focus points of With-Me. Knowing these focus points will give guidance for the selection of the cases and during analysis of the value network and the analysis. Also, from the SWOT analysis some business requirements will be extracted.

The scope of the cases to be analysed will be on eco-systems and services that cross the border between consumer market and public funded care. The cases were brought up by the consortium partners of With-Me and the market watch. The cases show the "state of the market" and from those we will learn how these businesses have become successful.

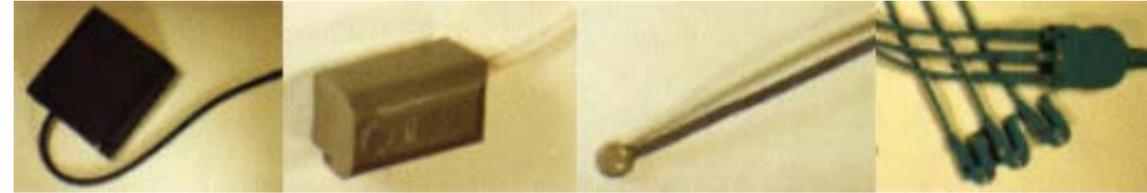
Based on the cases and the stakeholder map made, a value network is constructed for the With-Me ecosystem. The value network shows the many roles involved and the complex of interests and relations that act on many different markets.

There are also no market analysis reports that cover the complete depth and width of the With-Me market. Instead of trying to be complete the decision was made that at this point in the project it was important to get a sense of the scale of the target group, to get an overview of how to approach this market, to see the financial potential of the market and understand the drivers and barriers.



Towards Market Size evaluation.

Potential customers are either in the LifeStyle or LifeCare group or in both.



Defining possible exploitation strategies

On the post-diagnostic market the size of the target population is estimated by looking at the number of people with a chronic disease. In the countries participating in With-Me (Finland, Denmark, Netherlands, Belgium and Spain) the size of this target group is estimated at 26 million people. The pre-diagnostics side of the market is more difficult to quantify. The group of 'Fit performers' is at least 10% of the population, which is another 8,6 million people. The group 'Information seekers' is the most diverse group, with many different interests and overlap between subgroups (smoking and physical inactive). For this group it is best to look at the different goals people try to achieve and quantify those groups (every year 5,8 million people try to quit smoking).

With-Me does not fit easily in the definitions of market research but mHealth, Personal Health Systems or Connected Wearables all have a bright future ahead. However these are mostly predictions from the supply side.

The demand side in the health domain shows drivers for innovation but also many barriers. We conclude there is a great potential but it will not be easy to make this happen. The results of the work are synthesized in an enhanced vision of the With-Me ecosystem and business requirements on the topics of: control, governance,

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interoperability, marketing, quality, rapid application development, scalability, security, system performance, usability and value. . Because With-Me focusses on the population that is hard to reach or difficult to motivate to

improve their health, all identified "personas" as potentially subject to With-Me services have some indication of a health risk or health problem and do not score well on self-efficacy.

The market however is not limited to that group. Potential customers are either in the LifeStyle or LifeCare group or in both.

Knowing the stakeholders and understanding all interests, market drivers and barriers is the start of designing new business models. Therefore, the purpose of this report is to identify requirements for the With-Me concept and the With-Me business case. These requirements will be extracted from a value network analysis as well as from a market analysis.

From a business modelling perspective, With-Me has three important elements to

Consider. Those are:

- the development of an eco-system of technologies, sensors, devices, services, businesses and end-users,
- the development of services that are able to make a connection between the consumer lifestyle market, the prevention market and the publicly funded care market

- the wide variety of markets that will be (partially) addressed by With-Me like for instance the embedded sensor and platform markets or the lifestyle, prevention and chronic diseases market.

Knowledge about the business of eco-systems is far less developed but important to the success of With-Me.

Technological Approach: This issue's questions and answers

Q: What is the process followed to identify the technical requirements of With-Me developments?.

A: In first place, an overview of the state-of-the art on health prevention. It provides an overview about

- (1) preventive measures and their effects on health,
- (2) the current available preventive technologies, and
- (3) the current preventive measures



implemented Within various European Healthcare systems.

Then .Scenarios in each country are described using the "Persona" approach to describe specific use case. Then common elements are identified so that the final integration includes the functional requirements necessary to fulfill each country's targets.

With-Me Contribution to

STANDARDS

From the beginning of the project, work is clearly established to (1) ensure that the With-Me service architecture makes use and adheres to applicable standards and (2) to ensure that innovative results of the With-Me project contribute to relevant standards. This task consists of the following activities:

- Determine which standards and policies will be used in the With-Me project.
- Determine how the work done at With-Me can impact on those standards.
- Provide feedback to Standardization bodies

The goal is to ensure a significant contribution of the project to relevant Standards Development.in order to increase project impact and exploitation potential.