

# Connected Care in Europe



**Connected Care in Europe** is a comprehensive report from Berg Insight analysing the latest developments on the telehealth and telecare markets in this region.

This strategic research report from Berg Insight provides you with 165 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.

## ***This report will allow you to:***

- **Profit** from 30 executive interviews with market leading companies.
- **Identify** key players in the connected care ecosystem.
- **Learn about** the latest developments in connected care devices and services.
- **Understand** the dynamics of the European healthcare and social care systems.
- **Evaluate** how the adoption of next-generation solutions is proceeding.
- **Benefit** from expert market analysis including detailed market forecasts lasting until 2024.



**Order now!**

Please visit our web site to order this report and find more information about our other titles at [www.berginsight.com](http://www.berginsight.com)

## **Berg Insight's M2M Research Series**

What are the key business opportunities in the emerging wireless M2M/IoT market? Berg Insight's M2M Research Series is a unique series of 35 market reports published on a regular basis. Each title offers detailed analysis of a specific vertical application area such as smart metering, fleet management or car telematics. Once per year we also publish summaries of our research with detailed forecasts for the Global and European wireless M2M markets respectively.

[www.berginsight.com](http://www.berginsight.com)

See inside for further details →



## Connected care revenues in Europe will reach € 7.5 billion by 2024

The ageing population and the increasing prevalence of chronic diseases will be two of the greatest challenges in Europe during this century. It is widely believed that connected care solutions can ease the burden on society by enabling more efficient delivery of care and allowing people to live independently in their homes for longer. Berg Insight's definition of connected care comprises telecare and telehealth solutions that are used for the remote delivery of healthcare and social care services. Today, the most common connected care solution is the traditional telecare alarm, which includes a wearable alarm button that the user presses in the case of an emergency. Next-generation telecare systems are technologically more advanced and can automatically trigger an alarm, for instance if the user leaves home at an unexpected time or forgets to take his or her medicine. Furthermore, next-generation telecare solutions include mobile telecare alarms that users can carry with them at all times. Telehealth solutions involve connected medical devices and monitoring services that are used for the remote management of patients with COPD, chronic heart failure, diabetes, hypertension, asthma, coronary heart disease or chronic kidney disease.

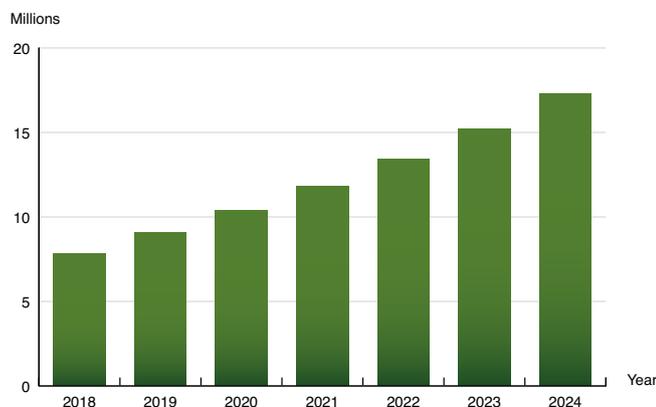
Traditional telecare is the largest and most mature segment of the connected care market with a total of 5.2 million users at the end of 2018. The market for next-generation telecare solutions is entering a growth phase with an estimated total of 2.6 million users in the EU 28+2 countries at the end of 2018, whereas the number of telehealth users reached 1.0 million. The total number of people using connected care solutions amounted to 7.8 million at the end of 2018, as there is an overlap between the three solution categories. The market is forecasted to grow at a CAGR of 14.1 percent during the next six years to reach 17.3 million connected care users by 2024. Berg Insight expects that traditional telecare will be overtaken by next-generation telecare as the largest segment of the connected care market with a forecasted 8.3 million users in 2024. However, traditional telecare will follow with 6.2 million users and telehealth with 5.6 million users at the end of the forecast period.

Connected care revenues in the EU 28+2 countries reached an estimated € 3.3 billion in 2018. This includes revenues from traditional telecare solutions, next-generation telecare solutions and telehealth solutions. The market is expected to grow at a CAGR ►

of 14.7 percent between 2018 and 2024 to reach € 7.5 billion at the end of the forecast period. Traditional telecare solutions accounted for the largest share of the market in 2018 but will not grow as quickly as the next-generation telecare and telehealth markets during the next six years.

The traditional telecare equipment market in Europe is highly consolidated. The two major players – Tunstall and Legrand – hold leading positions in nearly all markets and together account for almost 70 percent of telecare unit sales in the region. The next-generation telecare market is on the other hand fragmented. In addition to the leading telecare equipment vendors, companies active in the next-generation market include specialised providers such as Essence Group, Just Checking, Vitalbase and Vivago in activity monitoring; Everon, Libify, Navigil, Oysta Technology, SmartLife Care and Smartwatcher in mobile telecare; and Evondos, Innospense and MediRätt in medication compliance monitoring. The telehealth market is similarly a fragmented market that is evolving quickly. Many new start-ups as well as well-established solution providers from adjacent industries are active on the market. Examples include BodyTel, Capsule Technologies, Comarch, eDevice, Luscii, OpenTeleHealth and SHL Telemedicine.

The ongoing digitalisation of telephone networks in Europe will require massive replacements of PSTN-based telecare systems in the coming years. At the same time, there is rising interest in new types of solutions that enable social care and healthcare services to be delivered more efficiently. Berg Insight expects that these trends will catalyse the transition to the next generation of connected care solutions. Future caregiving is also anticipated to be predictive in nature by analysing user data and acting on abnormalities. Care providers will work with solutions that rely on data not only from telecare devices, but also from other sources such as smart home sensors and healthcare records. The transition to digital technologies is good news for mobile network operators, as the vast majority of all new connected care systems rely on cellular connectivity. In fact, Berg Insight predicts that the number of cellular connections will grow from around 2.4 million in 2018 to more than 8.1 million in 2024.



Connected care systems in use (Europe 2018–2024)

### This report answers the following questions:

- Which are the main verticals within connected care?
- What are the main drivers on this market in Europe?
- How many people are using telecare systems in each European country?
- What are the general technology trends for connected care products?
- Which are the leading telecare equipment providers in Europe?
- How will the connected care market evolve in the next five years?
- How will the markets for telehealth, telecare and smart home solutions converge?
- What is the potential market size for cellular IoT connectivity?



## Executive Summary

### 1 Healthcare and social care in Europe

#### 1.1 Introduction

- 1.1.1 The ageing population
- 1.1.2 Metabolic syndrome and lifestyle-related diseases

#### 1.2 Chronic diseases

- 1.2.1 Cardiovascular diseases
- 1.2.2 Chronic respiratory diseases
- 1.2.3 Diabetes

#### 1.3 Neurological disorders, mental disorders and physical disabilities

- 1.3.1 Autism spectrum disorders
- 1.3.2 Dementia
- 1.3.3 Epilepsy
- 1.3.4 Other disorders and disabilities

#### 1.4 Healthcare and social care systems

- 1.4.1 Healthcare systems
- 1.4.2 Social care systems

#### 1.5 The regulatory environment

- 1.5.1 Medical device regulations
- 1.5.2 Privacy regulations
- 1.5.3 Standardisation

### 2 Traditional telecare solutions

#### 2.1 Market overview

- 2.1.1 Form factors and use cases
- 2.1.2 Value chain
- 2.1.3 Competitive landscape

#### 2.2 Solution providers

- 2.2.1 9Solutions
- 2.2.2 Azur Soft
- 2.2.3 Beghelli
- 2.2.4 Centra Pulse and Connect
- 2.2.5 Chubb Community Care
- 2.2.6 Doro
- 2.2.7 Eurocross
- 2.2.8 Legrand
- 2.2.9 Medvivo
- 2.2.10 TBS Group
- 2.2.11 TeleAlarm Group
- 2.2.12 Tunstall Healthcare Group
- 2.2.13 Urmet ATE
- 2.2.14 Verklizan
- 2.2.15 Vitakt Hausnotruf

### 3 Next-generation telecare solutions

#### 3.1 Market overview

- 3.1.1 Form factors and use cases
- 3.1.2 Value chain
- 3.1.3 Competitive landscape

#### 3.2 Solution providers

- 3.2.1 Buddi
- 3.2.2 ContinYou
- 3.2.3 Essence Group
- 3.2.4 Everon
- 3.2.5 Evondos
- 3.2.6 GTX Corp
- 3.2.7 Innospense
- 3.2.8 Just Checking
- 3.2.9 Libify
- 3.2.10 Limmex
- 3.2.11 LOSTnFOUND
- 3.2.12 MedicPen
- 3.2.13 MediRätt
- 3.2.14 Merck Group
- 3.2.15 Navigil
- 3.2.16 Oysta Technology
- 3.2.17 Posifon
- 3.2.18 Sensio
- 3.2.19 Skyresponse
- 3.2.20 SmartLife Care
- 3.2.21 Smartwatcher
- 3.2.22 Telenor
- 3.2.23 Victrix SocSan
- 3.2.24 Vitalbase
- 3.2.25 Vivago

### 4 Telehealth solutions

#### 4.1 Market overview

- 4.1.1 Form factors and use cases
- 4.1.2 Value chain
- 4.1.3 Competitive landscape

#### 4.2 Solution providers

- 4.2.1 Alphabet
- 4.2.2 Apple
- 4.2.3 Be Patient
- 4.2.4 BodyTel
- 4.2.5 BT Group
- 4.2.6 Capsule Technologies (Qualcomm Life)
- 4.2.7 Comarch
- 4.2.8 Dignio

- 4.2.9 DXC Technology
- 4.2.10 eDevice
- 4.2.11 Hope Care
- 4.2.12 KPN
- 4.2.13 Luscii
- 4.2.14 Medixine
- 4.2.15 MedM
- 4.2.16 OpenTeleHealth
- 4.2.17 S3 Connected Health
- 4.2.18 SHL Telemedicine
- 4.2.19 Telbios
- 4.2.20 Telefónica
- 4.2.21 Telia Company
- 4.2.22 Vitaphone
- 4.2.23 Voluntas

### 5 Market forecasts and conclusions

#### 5.1 Market trends and analysis

- 5.1.1 PSTN switch off continues to drive the transition to IP-based telecare
- 5.1.2 Millions of new cellular connections will be needed for connected care
- 5.1.3 BYOD will become a popular and viable option for telehealth
- 5.1.4 Technological developments affect the competitive landscape
- 5.1.5 Integrated data systems are becoming increasingly important
- 5.1.6 Convergence between telecare and telehealth towards integrated care
- 5.1.7 From frequent readings to AI-driven patient engagement
- 5.1.8 Next-generation activity monitoring solutions enable new use cases
- 5.1.9 The interest in mobile telecare solutions is growing
- 5.1.10 The medication compliance monitoring market gains momentum in Europe
- 5.1.11 A slowly awakening consumer market for telecare in Europe

#### 5.2 Market forecasts

- 5.2.1 Traditional telecare
- 5.2.2 Next-generation telecare
- 5.2.3 Telehealth

#### 5.3 Revenue forecasts

- 5.3.1 Traditional telecare
- 5.3.2 Next-generation telecare
- 5.3.3 Telehealth

### Glossary

# About the Authors



**Johan Fagerberg** is co-founder and an experienced analyst with a Master's degree in Electrical Engineering from Chalmers University of Technology. He has during the past 22 years published numerous articles and reports about M2M/IoT markets.

**Sebastian Hellström** is an IoT Analyst with a Master's degree in Innovation and Industrial Management from University of Gothenburg. His areas of expertise include connected care and mHealth.

**Berg Insight** offers premier business intelligence to the telecom industry. We produce concise reports providing key facts and strategic insights about pivotal developments in our focus areas. Berg Insight also offers detailed market forecast databases and advisory services. Our vision is to be the most valuable source of intelligence for our customers.

Who should buy this report?	Related products
<p><b>Connected Care in Europe</b> is the foremost source of information about the telehealth and telecare solution markets in this region. Whether you are an equipment vendor, care provider, telecom operator, investor, consultant, or government agency, you will gain valuable insights from our in-depth research.</p>	<ul style="list-style-type: none"> <li>■ People Monitoring and Safety Solutions</li> <li>■ mHealth and Home Monitoring</li> <li>■ Connected Wearables</li> <li>■ Smart Homes and Home Automation</li> </ul>

© Berg Insight AB - No. 201

## Order form — TO RECEIVE YOUR COPY OF CONNECTED CARE IN EUROPE

You can place your order in the following alternative ways:

- Place your order online in our web shop at [www.berginsight.com](http://www.berginsight.com)
- Mail this order sheet to us at: Berg Insight AB, Viktoriagatan 3, 411 25 Gothenburg, Sweden
- Email your order to: [info@berginsight.com](mailto:info@berginsight.com)
- Phone us at +46 31 711 30 91

### Choose type of format

- Paper copy ..... 1000 EUR
- PDF 1-5 user license ..... 1500 EUR
- PDF corporate license ..... 3000 EUR

Family/Surname	Forename	Position	Company
Address		Country	Postcode
Telephone		Email	

VAT is chargeable on all orders from Sweden. Orders from all other countries in the European Union must include the buyer's VAT Registration number below in order to avoid the addition of VAT.

Your PO number	Your VAT/TVA/IVA/BTW/MWST number
----------------	----------------------------------

### Please charge my credit card

- VISA    Mastercard

Card number	Expiry date (MM/YY)	CV code
Cardholder's name	Signature	
Billing address		
Postcode	Country	

- We enclose our cheque payable to Berg Insight AB
- Please invoice me

Signature	Date
-----------	------

Reports will be dispatched once full payment has been received. For any enquiries regarding this, please contact us. Payment may be made by credit card, cheque made payable to Berg Insight AB, Viktoriagatan 3, 411 25 Gothenburg, Sweden or by direct bank transfer to Skandinaviska Enskilda Banken, 106 40 Stockholm, Sweden.

Account Holder: Berg Insight AB  
 Account number: 5011 10 402 80  
 BIC/SWIFT: ESSESESS  
 IBAN: SE92 5000 0000 0501 1104 0280

