

Push Telecommunications for Tele-Medicine (PTT) and M-Health: Market Shares, Strategies, and Forecasts, Worldwide, 2015 to 2021

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Abstracts

LEXINGTON, Massachusetts (April 20, 2015) – WinterGreen Research announces that it has published a new study Push Telecommunications for Telemedicine (PTT) and M-Health: Market Shares, Strategy, and Forecasts, Worldwide, 2015 to 2021. The 2015 study has 815 pages, 259 tables and figures. Worldwide markets are poised to achieve significant growth as the push systems are used inside telemedicine systems and m-health apps to move patient and clinician communication in a secure manner to and from the person or clinician that needs the healthcare information. Telecommunications initiatives are being implemented with handset and tablet communications for all patients and clinicians.

Telemedicine and M-health market driving forces relate to people taking more responsibility for their own health. Telemedicine and m-health contribute to healthcare delivery in the home and office. M-health, delivered over the smart phone and tablet, comes in the form of apps. Telemedicine is evolving toward smart phone device delivery as well.

The cost of Telemedicine for the US veterans administration is \$1,630 per patient per annum. This is substantially less than skilled nursing facility programs and nursing home care which costs \$100,000 per annum. VHA's positive experience with enterprise-wide home Telemedicine implementation is driving adoption by hospitals everywhere. Telemedicine is an appropriate and cost-effective way of managing chronic care patients in both urban and rural settings.

The Telemedicine adoption rate is growing. Cost of care delivery has become a major concern worldwide as the population ages. Mobile phone apps and remote telemedicine

equipment are driving increased adoption, growing adoption rates. Concerns regarding the efficacy of care through use of Telemedicine in healthcare industry have alleviated. Reimbursement is being made available for clinicians for the use of Telemedicine.

Patients are being encouraged to take more responsibility for their own care. Technology is bringing change. People have more accurate information available to themselves. The current situation is impacted by the very high proportion medical spending that is directed to treatment of chronic disease. A second aspect is that chronic conditions are best controlled by interventions on a daily basis with a trusted nurse monitoring and measuring outcomes of various situations.

The tele-monitors integrates with the management suites to empower care providers within healthcare systems, physician offices, or home health agencies with web-enabled, on-demand access to this configurable device. Wireless connectivity with a broad range of peripheral devices supports patients with a variety of the needs and risk factors.

Medical consultation systems to allow healthcare providers to remotely monitor patients around-the-clock. Voice-enabled, disease-specific symptom management (DSSM) questions are part of the system. Protocols (include multi-level questions. Multilevel questions sets can be triggered by yes or no answers.

This level of granularity enables care providers to telemonitor patients with chronic diseases. Disease conditions monitored include hypertension, COPD, CHF, and diabetes. Honeywell network of remote patient monitors consists of 70,000 installed units. This is a significant installed base. Honeywell offers a complete and flexible telemonitoring system. Accurate vital signs collection is improved with clear auditory and visual cues to the patient.

This study deals with three separate related markets. Telemedicine is the tracking and monitoring of chronic disease. Vital signs and advice are core parts of the business. M-health is a separate business related to the development of apps that are providing monitoring through smart phones and tablets, and are providing wellness applications. Tele-health is a related market. In tele-health, companies, enterprises, and insurers contract with a services provider to be available on the telephone to help people deal with a virus, an infection, poison ivy, pink eye, and common disease conditions that can be managed with telephone or video communications.

M-Health relates to apps. The app helps healthcare providers meet patients where they are, enabling just-in-time patient education and care coaching through the power of the mHealth. Health Groups are evolving worldwide leadership positions in mobile health systems with millions using its mobile health applications on iOS and Android, enjoying the personal and family benefits of being led to live a more active, healthier lifestyle.

Push telecommunications for Telemedicine (PTT) and M-health supports custom messaging from patients on a daily basis. Messaging is a feature of the Bosch Health Buddy System and other leading telemedicine systems. The systems rely on content programs that are tailored to patient conditions and involve questionnaires tailored to the chronic condition in the case of patients with those types of disease conditions.

With chronic disease telemedicine systems, content is pushed out to the patient on a custom basis, addressing changes in patient condition. Content varying is implemented each day to assess different key aspects of care and to keep the experience fresh for patients. The custom messaging feature enables care providers to send customized notifications to specific patients or their entire population with the click of one button. Messages appear on the patient's device display on their next session, and are archived and audited by the system, allowing the care provider to track when patients receive and view their messages.

In the case of remote presence telemedicine systems and video conferencing systems, the care giver needs to have access to the patient record. In the long term, this will be how the systems all work, that the physician talking to the patient has the ability to see the test results and the patient history.

There is strong market growth in all segments, but the most dramatic is in the smart phone apps segment. Electronic personal monitoring and profiling of healthy behaviors will grow dramatically. The unprecedented availability of sensors that detect sleep patterns, exercise patterns, and correlate these with vital signs monitoring is bringing a huge change to living.

Just as sports clubs have created a way for people to exercise instead of going to the bar, so also smart phones will encourage healthy behaviors. The information gathered will make its way into the electronic patient record, feeding ways for physicians to encourage compliance. Apps at \$.99 each will predominate, linking to cognitive computing systems in the cloud.

The analytical capabilities of cognitive computers help people make sense of the

accumulated information about lifestyle and will help people make more intelligent choices about lifestyle. Telemedicine device and software companies recognize that their revenue stream will come from services delivery. Just as smart phones are paid for in conjunction with the services contracts, so also the Telemedicine applications are paid by insurance.

In some cases the insurance companies recognize that their long term costs are lower by delivering clinical intervention to try to impact lifestyle for patients with chronic disease conditions. Early intervention is dramatically less expensive than a trip to the emergency ward. (ER)

IBM Watson cognitive computing drives the M-health market with its cloud computing analytics available to a number of market participants. Healthcare patient, physician, and facility decision support markets are forecast based on the broad availability of smartphones combined with the IBM Watson technology that promises to revolutionize care delivery for every healthcare venue.

Watson offers Interactive Care Insights for Oncology. The cognitive systems use insights gleaned from the deep experience of Memorial Sloan-Kettering and Massachusetts General Hospital clinicians. Watson is positioned to permit clinicians to provide individualized treatment. More options are based on patient medical information. IBM Watson in combination with Memorial Sloan-Kettering Cancer Center has information that represents the synthesis of a vast array of updated and vetted treatment. It is able to compute individual treatment guidelines. This represents a revolution in cancer treatment care and presages a major revolution in all healthcare treatment and diagnosis.

Teladoc, Inc. provides telehealth services in the United States. It has a stable of doctors that perform diagnoses, recommend treatment, and prescribe medication for various medical issues, including cold and flu symptoms, bronchitis, allergies, poison ivy, pink eye, urinary tract infection, respiratory infection, sinus problems, ear infection, and more.

Teladoc is the largest telehealth provider in the nation, founded in 2002. Teladoc provides 24/7/365 access to U.S board-certified doctors. Telehealth services are available when needed. Teladoc is the nation's leading telehealth provider with 10 million members and 300,000-plus consults annually. Teladoc provides 24/7 access to affordable, high-quality medical care for adults and children experiencing non-emergency medical issues via phone, secure online video, mobile app or HealthSpot

Station – a private, walk-in kiosk. Through a directly-managed network of U.S.-based, board-certified physicians, Teladoc delivers a 95 percent patient satisfaction rate with an average response time of eight minutes.

Teladoc client EMC Corporation Teledoc works closely with the Director of Benefits to leverage telemedicine services for employees. Telemedicine is offered as part of benefits packages. Teledoc provides employees with greater access to convenient, high quality medical care.

Worldwide Telemedicine and M-health PTT push market driving forces relate to the improved effectiveness of remote communications in all industries. An clinical reimbursement addressing mobile health initiative for chronic conditions. This trend promises to become prevalent as people learn how to keep themselves healthier. Healthy behaviors such as exercise, good diet and stress management have the potential to reverse aging on a molecular level and partly restore the vitality of a person's cells.

Healthy lifestyle choices can increase the length of DNA sequences found at the end of a person's chromosomes. This shift toward wellness has stimulated the need for better communication between clinicians and patients. New sensor technology creates the opportunity for monitoring and for alerts to be send to and from at risk people who are exercising.

PTT telemedicine markets are poised to achieve significant growth as the existing telemedicine systems merge with the smart phone systems of engagement to provide a way to improve clinical care delivery to patients with chronic disease, decreasing hospitalizations and visits to the emergency room. There is a convergence of telemedicine and m-health as the patients become more responsible for their own care delivery and their own health.

According to Susan Eustis, lead author of the WinterGreen Research team that prepared the telemedicine market research study, "Push technology for telemedicine (PTT) is evolving large new markets. Markets are evolving as smart phone devices find more uses. Differential diagnostic tools and significant improvements in monitoring support differential tele-medical treatment. The decision process takes into account clinical findings from home monitoring devices and from symptoms verbally communicated in a clinical services implementation."

Telemedicine, telehealth, and m-health contribute to healthcare delivery. M-health will

surely be delivered over the smart phone and tablets. Telemedicine is evolving toward smart phone device delivery as well. The cost of Telemedicine is substantially less than other NIC programs and nursing home care. VHA's experience is that an enterprise-wide home Telemedicine implementation is an appropriate and cost-effective way of managing chronic care patients in both urban and rural settings.

Chronic disease conditions are best treated early on when there is a change in patient condition and an early intervention can make a difference. It is even better to treat them in a wellness treatment environment before there are indications of chronic disease, before symptoms develop, by addressing lifestyle issues early on.

Telemedicine, telehealth, and M-health markets at \$1.5 billion in 2014 are anticipated to reach \$45.4 billion by 2021. M-Health markets related to telemedicine will grow the fastest, leveraging 9.5 billion smart phones and 5 billion connected tablet devices installed all over the world by 2021.

WinterGreen Research is an independent research organization funded by the sale of market research studies all over the world and by the implementation of ROI models that are used to calculate the total cost of ownership of equipment, services, and software. The company has 35 distributors worldwide, including Global Information Info Shop, Market Research.com, Research and Markets, Electronics.CA, Bloomberg, and Thompson Financial.

WinterGreen Research is positioned to help customers face challenges that define the modern enterprises. The increasingly global nature of science, technology and engineering is a reflection of the implementation of the globally integrated enterprise. Customers trust WinterGreen Research to work alongside them to ensure the success of the participation in a particular market segment. WinterGreen Research supports various market segment programs; provides trusted technical services to the marketing departments. It carries out accurate market share and forecast analysis services for a range of commercial and government customers globally. These are all vital market research support solutions requiring trust and integrity.

Contents

TELE-MEDICINE AND M-HEALTH PUSH PTT EXECUTIVE SUMMARY

Tele-Medicine and M-Health Market Driving Forces

Real-Time Monitoring Of Physiological Data

PTT Push Telemedicine

M-Health and Tele-Medicine Market Convergence

Tele-Medicine and M-Health Market Shares

Telemedicine Chronic Disease Tracking Devices Market Share

Tele-Medicine And M-Health Market Forecasts

1. PUSH TELECOMMUNICATIONS FOR TELE-MEDICINE (PTT) AND M-HEALTH MARKET DESCRIPTION AND MARKET DYNAMICS

1.1 Definition of PTT

1.2 eICUs

1.3 Remote Monitoring as Standard of Care

1.3.1 Telemonitoring Systems Premise

1.3.2 Sedentary Get Exercise And Heart Failure Patients Pay Attention To Swelling In
Their Feet, Ankles Or Legs

1.3.3 Telemonitoring Systems Improve Home Health Care

1.3.4 Vital Signs And Health Status Are Measured Daily

1.3.5 Telemonitoring at Home

1.4 Federal Medicare Program for Seniors Health Apps - CMS

1.4.1 Cardiac Monitoring

1.5 Telemedicine

1.5.1 Nursing Stations

1.5.2 Telemedicine Services

1.5.3 Service Provider Adoption of Tele-Monitoring

1.5.4 Telemedicine Delivery Mechanisms

1.5.5 Telemedicine Point-To-Point Connections

1.5.6 High Definition Video Communication

1.6 Telemonitors Customized To Meet Individual Needs

1.7 US Makes Telemedicine Priority

1.7.1 Federal Funding for Telemedicine

1.7.2 US Telemedicine Medicare –

1.7.3 US Veterans Health Administration (VA) Use of Telemonitoring

1.7.4 Tele-monitoring Demonstrates Positive Results In Improving Health Care And

Reducing Costs Of Veterans

1.7.5 US VA Tele-monitoring Targeted Innovation:

1.8 Tele-Monitor Devices

1.8.1 Customizing Tele-Monitors

1.8.2 Intel Health Care Management Security

1.9 Telemonitoring Research

1.9.1 New England Journal of Medicine Research

1.9.2 NEJM Has Published Several Letters That Critique The Study

1.9.3 Bosch Health Buddy Desktop Research

1.9.4 Physician Notification on CHF

1.9.5 US Patient Protection and Affordable Care Act

1.10 Federal, State, Local, And Foreign Laws Compliance

1.10.1 Government Regulation of Medical Devices

1.10.2 Before And After A Medical Device Is Commercially Distributed, Ongoing

Responsibilities Under FDA Regulations

1.10.3 Tele-monitoring Third-Party Reimbursement

1.11 Health Information Privacy HIPAA Requirements

1.11.1 HIPAA Enforcement

1.11.2 OCR Responsible For Enforcing HIPAA Privacy and Security Rules

1.12 Hospital and Insurance Company Telemedicine Services

1.12.1 Hospital Telemedicine Systems

1.13 Postacute Care Co-ordination: Healthcare Reform Readmission Penalties

1.13.1 Federal Crimes Under The Health Insurance Portability and Accountability Act

HIPAA

1.14 Partners Mass General Cardiologist Program for High Risk Heart Failure Patients

2. TELE-MEDICINE / M-HEALTH MARKET SHARES AND MARKET FORECASTS:

2.1 Tele-Medicine and M-Health Market Driving Forces

2.1.1 Real-Time Monitoring Of Physiological Data

2.1.2 PTT Push Telemedicine

2.1.3 M-Health and Tele-Medicine Market Convergence

2.2 Tele-Medicine and M-Health Market Shares

2.2.1 Telemedicine Chronic Disease Tracking Devices Market Share

2.2.2 Bosch

2.2.3 Viterion

2.2.4 Care Innovations / Intel / GE

2.2.5 Honeywell

2.2.6 ProConnections Telemedicine Systems Enhance the Delivery of Healthcare

- 2.2.7 Tactio
- 2.3 Tele-Medicine And M-Health Market Forecasts
 - 2.3.1 Telemedicine and M-Health Market Segments, Clinical Tracking of Chronic Disease, Physician Remote Presence, Smart Phone Apps, and Video Conferencing Telepresence
 - 2.3.2 75% of Home Healthcare Organizations Have Funded Home Telemedicine Initiatives
 - 2.3.3 Telemedicine Devices
- 2.4 Telemedicine Push Technology
 - 2.4.1 Telemedicine Video Conferencing Telepresence Market Shares
 - 2.4.2 Telehealth Remote Presence Telemedicine Market Shares
 - 2.4.3 M-Health Telemedicine Apps Market Shares
 - 2.4.4 M-Health Apps Market Forecasts
 - 2.4.5 IBM Watson Cognitive Computing Drives the Market
 - 2.4.6 IBM Watson Cognitive Computing
- 2.5 M-Health Wireless Tele-Health Apps
 - 2.5.1 Cigna MDLive App
 - 2.5.2 Carrier Service Provider Telemedicine Challenges
 - 2.5.3 Telemedicine Carrier Service Providers
 - 2.5.4 AT&T
 - 2.5.5 Healthcare Providers Use Technology To Improve Effectiveness Of Care Providers
 - 2.5.6 HHSC
- 2.6 M-Health and Tele-Medicine Insurance Initiatives
 - 2.6.1 Aetna
 - 2.6.2 Kaiser
 - 2.6.3 Humana
 - 2.6.4 UnitedHealthOne
 - 2.6.5 Cigna
- 2.7 M-Health and Tele-Medicine Key Clinical Initiatives
 - 2.7.1 Massachusetts General
 - 2.7.2 WellPoint
 - 2.7.3 Mayo Clinic
 - 2.7.4 MD Anderson and Sloan Kettering
- 2.8 M-Health Apps
 - 2.8.1 FDA
 - 2.8.2 FDA Types of Mobile App Regulated
 - 2.8.3 From B2B to B2B2C: Making Meaningful Use of mHealth
- 2.9 Tele-Medicine Alarm Devices

- 2.9.1 Telemedicine Computer Industry Vendor Market Share and Forecast
- 2.9.2 Healthcare Decision Support Market Forecasts
- 2.9.3 Tele-health Originating Site Facility Fee Payment Amount Update
- 2.9.4 Healthcare Decision Support Market Forecasts, Facility, Research, and Insurers
- 2.9.5 Medical Criteria to Ensure Hospitalizations Are Necessary Gets Outdated Too Fast
- 2.10 Rapid Readmissions
 - 2.10.1 Medical Criteria to Ensure Hospitalizations Are Necessary Gets Outdated Too Fast
 - 2.10.2 Telemedicine Sensors Market Share and Forecast
 - 2.10.3 M-Health Apps
 - 2.10.4 Telemedicine Carrier Services Market Shares and Forecast
 - 2.10.5 Telemedicine Videoconferencing Market Shares and Forecast
- 2.11 Statistics Describing Telemedicine Market
 - 2.11.1 Congestive Heart Failure
 - 2.11.2 Diabetes Chronic Illness Numbers
 - 2.11.3 Incidence of Chronic Disease
 - 2.11.4 Chronic Diseases Account For Two-Thirds Of Worldwide Healthcare Spending
 - 2.11.5 Clinical Staff / Patient Ratios: Physician Shortages
 - 2.11.6 Tele-medicine Disease Statistics Incidence and Prevalence
 - 2.11.7 Aging Of The Population
 - 2.11.8 Robotic Therapeutic Stroke Rehabilitation
 - 2.11.9 Disease Rehabilitation
 - 2.11.10 Rehabilitation of Hip Injuries
 - 2.11.11 Medical Conditions Requiring Supplemental Oxygen
 - 2.11.12 Tele-medicine Market Driving Forces
 - 2.11.13 Measures of Tele-Medicine Effectiveness
 - 2.11.14 Home Patient Monitoring Supports Patient Education
 - 2.11.15 Real-Time Monitoring Of Physiological Data
 - 2.11.16 Tele-Medicine IBM Watson, Honeywell, Vitarian, and Bosch Diagnostic Support Expert Systems
 - 2.11.17 Huawei Telemedicine Helps Treat Chronic Diseases in an Aging Population
- 2.12 Telemedicine Device and App Prices
 - 2.12.1 Tele-Medicine Prices and Reimbursement
 - 2.12.1 Cost of Honeywell Homemed Home Health Monitoring & MedPartner
 - 2.12.2 TouchPointCare
 - 2.12.3 Cost of Honeywell Home Health Monitoring
- 2.13 Telemedicine Regional Markets

3. PUSH TELEMEDICINE (PTT) / M-HEALTH PRODUCT DESCRIPTION

3.1 Bosch Healthcare Telemedicine Solutions

- 3.1.1 Bosch Health Buddy
- 3.1.2 Bosch Health Buddy System
- 3.1.3 Bosch Health Buddy Integrated Cellular Modem
- 3.1.4 Bosch Healthcare, Bosch Telemedicine and Care Solutions
- 3.1.5 Bosch Healthcare Supports Independent Living At Home
- 3.1.6 Bosch Telemedicine Solutions
- 3.1.7 Bosch Telemedicine Provides Daily Report About Patients with Chronic Conditions
- 3.1.8 Bosch Devices for Patients with Diabetes
- 3.1.9 Bosch Health Buddy Decision Support Tools
- 3.1.10 Bosch Patient Support System
- 3.1.11 Bosch Telemedicine Results
- 3.1.12 Bosch Healthcare Telemedicine Wireless Systems
- 3.1.13 Bosch Healthcare Telemedicine Custom Messaging Feature
- 3.1.14 Bosch Healthcare Advancing Telemedicine Solutions Through Dialogue
- 3.1.15 Bosch Healthcare Telemedicine Growth
- 3.1.16 Bosch / McKesson Telemedicine Advisor
- 3.1.17 McKesson Channel Partner - The Bosch Group

3.2 Viterion

- 3.2.1 Viterion Improves Healthcare Delivery
- 3.2.2 Value VA Derives from Viterion Telehealth Technologies
- 3.2.3 Viterion Systems Efficiencies at UK Department of Health (DOH)
- 3.2.4 ViterionNET Capabilities
- 3.2.5 ViterionNET Data-Encryption
- 3.2.6 Viterion Telemedicine Monitor For Diabetes Care

3.3 Honeywell

- 3.3.1 Honeywell Lifestream Manager
- 3.3.2 Honeywell Lifestream Analytics
- 3.3.3 Honeywell Lifestream View
- 3.3.4 Honeywell LifeStream Connect
- 3.3.5 Honeywell Genesis DM
- 3.3.6 Honeywell Tablet Telemedicine App
- 3.3.7 Honeywell Telemedicine Devices
- 3.3.8 Samsung Galaxy Tablet Runs Honeywell Cloud Telemedicine App
- 3.3.9 Honeywell Genesis Touch Allows the Galaxy Tablet
- 3.3.10 Honeywell Genesis LifeStream Dashboard

- 3.3.11 Honeywell Health Monitoring System: Visiting Nurses Association (VNA)
- 3.3.12 Honeywell MedPartner
- 3.3.13 Honeywell Health Monitoring System Criteria for Monitoring
- 3.3.14 Honeywell Health Monitoring System FDA Class II, Hospital Grade, Medical Device
- 3.3.15 Honeywell Med Partner
- 3.3.16 Honeywell Genesis Touch Telemedicine App
- 3.3.17 Honeywell Genesis Touch include the Fuze Meeting Visual Collaboration
- 3.4 Care Innovations / Intel / GE
 - 3.4.1 Care Innovations SOA Software
 - 3.4.2 Care Innovations Patient Reports
 - 3.4.3 Care Innovations Connect Can Help Seniors In Independent Living Facilities
- 3.5 Medtronic / Cardiocom
 - 3.5.1 Cardiocom Telehealth Systems
 - 3.5.2 Cardiocom Commander Flex
 - 3.5.3 Cardiocom Telescale
 - 3.5.4 Cardiocom Glucocom & Autolink
 - 3.5.5 Cardiocom Teleresponse
 - 3.5.6 Cardiocom Netresponse
 - 3.5.7 Cardiocom Linkview
- 3.6 Philips
 - 3.6.1 Philips Secure Data Infrastructure Supports Patient at Home
 - 3.6.2 Philips HealthStart MRx Monitor/Defibrillator
 - 3.6.3 Philips HealthStart FR3 AED
 - 3.6.4 Philips HeartStart Telemedicine System
 - 3.6.5 Philips Heart Start
 - 3.6.6 Philips IntelliVue Application Server
 - 3.6.7 Philips Application Server Positioning
 - 3.6.8 Philips Steady Scale
- 3.7 Global Med Telehealth: Benefits of Video Conferencing
 - 3.7.1 Global Med WallDoc
 - 3.7.2 Global Med LiteExam Mobile Telemedicine Station
 - 3.7.3 GlobalMed Tele-Health Carts
 - 3.7.4 GlobalMed Telemedicine Products | Telehealth Equipment | Medical Technology
 - 3.7.5 GlobalMed Telemedicine Carts | Telehealth Carts
 - 3.7.6 GlobalMed i8500 Mobile Telemedicine Station
 - 3.7.7 GlobalMed TES (Transportable Exam Station)
 - 3.7.8 GlobalMed FirstExam Mobile Telemedicine Station
 - 3.7.9 GlobalMed Teleaudiology Cart | Mobile Medical Carts

- 3.7.10 GlobalMed Medical Technology Products | Mobile Medical Carts
- 3.7.11 GlobalMed Mobile Telemedicine Carts One Design Care Delivery
- 3.7.12 GlobalMed TotalExam HD Examination Camera
- 3.7.13 GlobalMed Diagnostic Imaging | Medical Imaging
- 3.7.14 GlobalMed Diagnostic Imaging | Medical Imaging Equipment
- 3.7.15 Global Med Health Care IT | Advanced Medical Technologies
- 3.8 IBM / Telemedicine
 - 3.8.1 IBM Watson Boston Children's Hospital Partnership
 - 3.8.2 IBM Cognitive Computing
 - 3.8.3 IBM's Watson Health Division Incorporates Patient Data from Apple389
 - 3.8.4 IBM Partners with Johnson & Johnson
 - 3.8.5 IBM Partners with Medtronic
- 3.9 Google
- 3.10 CDAC MERCURY™ Web Telemedicine
- 3.11 Telemedicine Video Conferencing
- 3.12 Cisco HealthPresence
 - 3.12.1 Cisco TelePresence System 3200 Series
 - 3.12.2 Cisco
- 3.13 Polycom Video Conferencing
 - 3.13.1 Polycom Telemedicine Addresses Aging Population Problem Combined With Too Few Doctors
 - 3.13.2 Polycom RealPresence Cloud Collaboration Center
- 3.14 Logitech Lifesize
 - 3.14.1 Logitech Lifesize Video Conferencing Helps Extend Patient Care
 - 3.14.2 Logitech Lifesize Global Medical Collaboration
 - 3.14.3 Logitech LifeSize Telemedicine Featured Customers
- 3.15 Vidyo Telemedicine Healthcare
 - 3.15.1 Vidyo for Healthcare Applications:
 - 3.15.2 Vidyo API
- 3.16 Sony Telemedicine Video Conferencing
 - 3.16.1 Sony Virtual Tumor Board
- 3.17 Huawei's Telemedicine Solution
- 3.18 Apps: Telemedicine Applications for Smartphones and Tablets
 - 3.18.1 US FDA Encourages The Development Of Mobile Medical Apps
- 3.19 MedApps
- 3.20 Biotronik Cardiac Telemonitoring Devices
 - 3.20.1 Biotronik Home Monitoring Lumax 540 Series State-Of-The-Art Features
- 3.21 Influence Health
- 3.22 Tactio

3.23 Teladoc

3.23.1 Teladoc Capitalization Of Inflection Point In Telemedicine Market

3.23.2 Teladoc Client EMC

3.23.3 Teladoc On Target To Complete More Than A Quarter-Million Medical Consults Across U.S.

3.23.4 Teladoc Doctors

3.24 1Life Healthcare

3.25 American Well

3.26 iRobot and InTouch

3.27 InTouch

4 . TELE-MONITOR TELEMEDICINE TECHNOLOGY

4.1 American Telemedicine Association

4.2 Patient-Centered /-Participatory Congestive Heart Failure Telemonitoring⁴⁵⁵

4.2.1 Heart Failure

4.2.2 TIM-HF Study CHF

4.2.3 TheTEHAF study

4.2.4 Johns Hopkins Home-Based Telemonitoring

4.3 Clinical Video Telehealth Protocols

4.3.1 Synchronous Clinical Video Telehealth

4.3.2 Asynchronous Clinical Video Telehealth

4.4 Diabetes Remote Monitoring

4.4.1 Diabetes Remote Monitoring Drivers

4.4.2 Partners HealthCare Diabetes Remote Monitoring Program Overview

4.4.3 Partners HealthCare Diabetes Monitoring Member

4.5 Partners Healthcare Blood Pressure Home Monitoring Health Initiative

4.5.1 Partners Healthcare Blood Pressure Connect

4.6 Medtronic

4.7 Health Monitoring

4.7.1 Patient-Centered Home Tele Health Monitoring

4.8 Chronic Heart Failure Clinical Studies

4.9 Texas Pilot Program

4.9.1 Obstructive Sleep Apnea (OSA) A Major Chronic Condition

4.9.2 Hypertension Intervention Nurse Telemedicine (HINTS) Study

4.10 Ingestible Event Marker

4.10.1 Home Healthcare Technologies

4.10.2 Telemonitoring Research Studies

4.11 Continua

- 4.11.1 Continua Health Alliance Provides Integration Technology
- 4.11.2 Continua Health Alliance
- 4.12 Telehealth Value Categories
- 4.13 Telemedicine Accessibility
- 4.14 Communities and Collaboration
- 4.15 Telemedicine Value Chain Sustainability
- 4.16 Telemedicine Sustaining Finance Model
 - 4.16.1 NHS
- 4.17 Real-Time Remote Medical Diagnosis System (RTRMDS)
 - 4.17.1 Tele-pharmacy
 - 4.17.2 Electronic Medical Records Detail Drug Information Effectiveness
 - 4.17.3 Consumers Increasingly Involved In Treatment Decision-Making
- 4.18 Health Care Monitoring Solutions Technology
 - 4.18.1 Health Information Exchange Services
- 4.19 Home-Based Care
- 4.20 Mobile Health Clinics'
 - 4.20.1 Self-Service Kiosks
 - 4.20.2 Mobile Health Care
 - 4.20.3 Mobile Office a Set Of Commonly Used Mobile Communication Tools
 - 4.20.4 Telemedicine Allows Medical Professionals To Consult And Diagnose Patients Remotely
- 4.21 DICOM Index Tracker NDS Surgical Imaging, LLC
- 4.22 Population Growing Older, Medical Costs Rising, Not Enough Doctors
 - 4.22.1 Remote Monitoring Device
- 4.23 US Government Tele-Health
 - 4.23.1 Telehealth Product Medical Device Regulation In The United States

5. TELEMEDICINE / M-HEALTH COMPANY PROFILES

- 5.1 Anthem
 - 5.1.1 Anthem and IBM
- 5.2 A&D Engineering / A&D Medical
 - 5.2.1 A&D Medical Wellness Connected
 - 5.2.2 A&D Wellness Connected Online Service
- 5.3 Aerotel Medical Systems
- 5.4 Aetna
 - 5.4.1 Aetna Business
 - 5.4.2 Aetna
- 5.5 Alcatel-Lucent

- 5.5.1 Alcatel-Lucent Business
- 5.5.2 Alcatel-Lucent Core Networking Segment
- 5.5.3 Alcatel-Lucent Healthcare Solutions
- 5.6 Aliph
- 5.7 American Heart Association (AHA)
 - 5.7.1 American Hospital Association Awards University of Rochester Pediatric Telemedicine Program
- 5.8 American Well
 - 5.8.1 American Well Partners
- 5.9 American TeleCare
- 5.10 American Telemedicine Association
- 5.11 Anthem
 - 5.11.1 Anthem Revenue by Segment
 - 5.11.2 Anthem To Launch National Telehealth Program
- 5.12 Apple
 - 5.12.1 Apple Revenue
 - 5.12.2 Apple Business Strategy
 - 5.12.3 Apple Products
 - 5.12.4 Apple iPhone
 - 5.12.5 Apple iWatch
 - 5.12.6 Apple iPad
 - 5.12.7 Apple Mac Hardware Products
 - 5.12.8 Apple iPod
 - 5.12.9 Apple iTunes
 - 5.12.10 Apple Mac App Store
 - 5.12.11 Apple iCloud
 - 5.12.12 Apple Software Products and Computer Technologies
 - 5.12.13 Apple Operating System Software iOS
 - 5.12.14 Apple Mac OS X
 - 5.12.15 Apple TV
- 5.13 AT&T
 - 5.13.1 AT&T Services and Products
 - 5.13.2 AT&T Voice Service –
 - 5.13.3 AT&T Innovative Data Services
 - 5.13.4 AT&T Business Customers
 - 5.13.5 AT&T Business Secure Mobile Threats
 - 5.13.6 AT&T Mobile Security
 - 5.13.7 AT&T Telehealth
 - 5.13.8 AT&T Virtual Care

- 5.13.9 AT&T Telemedicine Cloud Medical Imaging
- 5.13.10 AT&T Imaging in the Cloud
- 5.13.11 AT&T Telemedicine Mobile Viewer
- 5.13.12 AT&T Medical Imaging and Information Management
- 5.14 Athens Regional Home Health In-Home Telemonitoring Services
- 5.15 Authentidate Holding
 - 5.15.1 Authentidate Holding ExpressMD Solutions Joint Venture
 - 5.15.2 Authentidate Regional Service Offerings
 - 5.15.3 Authentidate Holding Remote Patient Monitoring Solutions
 - 5.15.4 Authentidate Holding VA Plan
- 5.16 Bosch Group
 - 5.16.1 Bosch Business Overview
 - 5.16.2 Bosch Group
 - 5.16.3 Bosch Security Systems Division
 - 5.16.4 Robert Bosch Healthcare
 - 5.16.5 Robert Bosch Remote Patient Monitoring
 - 5.16.6 Bosch Healthcare Telehealth Systems
 - 5.16.7 Bosch Healthcare Health Buddy System
 - 5.16.8 Bosch Addresses Role of Compliance in Telehealth Adoption
 - 5.16.9 Bosch North America Veterans Health Administration
 - 5.16.10 Bosch / VRI
 - 5.16.11 Bosch Healthcare and GreatCall Partnership
 - 5.16.12 Bosch Healthcare - Telehealth And Care Solutions Leading Provider
 - 5.16.13 Bosch Group and Health Hero Network
- 5.17 Cardiocom
 - 5.17.1 Cardiocom Telemedicine Nurse
 - 5.17.2 Cardiocom's Clinical Services:
- 5.18 Care Innovations: Intel and GE
- 5.19 Cigna
 - 5.19.1 Cigna Business
 - 5.19.2 Cigna Telehealth Coverage To Self-Insured
 - 5.19.3 Cigna / MDLIVE Advances Digital Health
- 5.20 Cisco
 - 5.20.1 Cisco Information Technology
 - 5.20.2 Cisco Virtualization
 - 5.20.3 Competitive Landscape In The Enterprise Data Center
 - 5.20.4 Cisco Architectural Approach
- 5.21 Cleveland Clinic
 - 5.21.1 Cleveland Clinic HealthSpot to Expand Telehealth Capabilities Through Walk-In

Kiosks

- 5.21.2 Cleveland Clinic MyChart
- 5.22 Columbia University's Informatics for Diabetes Education and Telemedicine
- 5.23 Connections365
- 5.24 Continua
- 5.25 Debiotech
- 5.26 Doctor on Demand
- 5.27 Drager
 - 5.27.1 Drager Life Support For Newborn Babies
 - 5.27.2 Drager Ventilation – Even When Airborne
 - 5.27.3 Dragerwerk AG Revenue Nine Months 2013:
- 5.28 Evident Health Services
 - 5.28.1 Evident Health Services (EHS)
- 5.29 FuzeBox
- 5.30 Gemalto / Cinterion
 - 5.30.1 Cinterion
 - 5.30.2 Gemalto / Cinterion
 - 5.30.3 Gemalto / Cinterion Active Member Of The Continua Alliance
 - 5.30.4 Gemalto / Cinterion Mobile Health - M2M Telemonitoring
- 5.31 General Electric
- 5.32 GlobalMed
 - 5.32.1 Haemonetics. / GlobalMed Technologies.
 - 5.32.2 GlobalMed ConnectedHealth Telemedicine
- 5.33 Google
 - 5.33.1 Google Competition
 - 5.33.2 Google 'Talk With A Doctor Now' Telemedicine Video Chat Service
 - 5.33.3 Google Business
- 5.34 GreatCall Healthcare Systems
- 5.35 HealthTap
- 5.36 Home Healthcare Hospice and Community Services (HCS)
 - 5.36.1 Home Healthcare Partners (HHP)
- 5.37 Honeywell
 - 5.37.1 Honeywell Major Businesses
 - 5.37.2 Honeywell:
 - 5.37.3 Honeywell Genesis Telehealth Monitors and LifeStream Management Suite
 - 5.37.4 Honeywell Health Monitoring System
 - 5.37.5 Honeywell Health Monitoring System: Health Visiting Nurses Association (VNA)
 - 5.37.6 Honeywell Reports Second Quarter 2011 Sales Up 15% to \$9.1 Billion
- 5.38 Huawei

- 5.38.1 Performance in 2013
- 5.39 IBM
 - 5.37.1 IBM Watson for Healthcare Acquisitions
 - 5.37.2 IBM Business Model
 - 5.37.3 IBM Strategy
- 5.40 Influence Health
 - 5.38.1 Influence Health Acquires BrightWhistle
- 5.41 Intel
 - 5.39.1 Intel Revenue by Major Operating Segment
 - 5.39.2 Intel Business
 - 5.39.3 Intel Company Strategy – Internet of Things
- 5.42 Infopia
 - 5.42.1 Infopia of Korea
- 5.43 iRobot
 - 5.43.1 iRobot Home Robots:
 - 5.43.2 iRobot Defense and Security: Protecting Those in Harm's Way
 - 5.43.3 iRobot Role In The Robot Industry
- 5.44 InTouch
 - 5.44.1 InTouch Health FDA
- 5.45 Johns Hopkins Home Telemonitoring
- 5.46 Joslin Diabetes Center / American Well Collaboration / Harvard Medical School
- 5.47 JSC CEM Technology
- 5.48 Kaiser
 - 5.49.1 Kaiser
- 5.50 Kiwok
- 5.51 Kyocera
 - 5.51.1 Kyocera DuraMax PTT Phone
 - 5.51.2 Kyocera Product-Line Management Teams
 - 5.51.3 Kyocera Chemical Corporation
 - 5.51.4 Kyocera Revenue
- 5.52 LG
 - 5.52.1 LG Telemonitoring Smartcare System
- 5.53 LifeMasters
- 5.54 Logitech
 - 5.54.1 LifeSize Telepresence
 - 5.54.2 Logitech Sales of PC Peripherals In Mature Markets Expected to Decline
 - 5.54.3 Logitech Digital Home Category
 - 5.54.4 Logitech LifeSize UVC Video Conferencing Infrastructure Platform
- 5.55 Mayo Clinic

- 5.55.1 Mayo Clinic Telehealth
- 5.56 McKesson
 - 5.56.1 McKesson Telehospice Technology
 - 5.56.2 McKesson / Caris Healthcare
- 5.57 MedApps
 - 5.57.1 MedApps Healthpal
 - 5.57.2 VRI Selects MedApps HealthPAL MA105to Extend the Home
 - 5.57.3 MedApps Comprehensive Health Information Management Platform
 - 5.57.4 MedApps' Value Proposition
- 5.58 Medtronic / Cardiocom
 - 5.58.1 Medtronic / Cardiocom, Remote Monitor
- 5.59 Montefiore / CMO, the Care Management Company
 - 5.59.1 CMO, The Care Management Company
- 5.60 National Committee for Quality Assurance
- 5.61 Nonin Medical, Inc.
 - 5.61.1 Nonin Medical AB
- 5.62 NSD / Viterion Corporation
 - 5.62.1 NSD Viterion
- 5.63 Partners Healthcare
 - 5.63.1 Partners HealthCare Focus Areas:
 - 5.63.2 Partners Healthcare Digital Care Delivery
 - 5.63.3 Partners Healthcare Patient Segmentation
 - 5.63.4 Partners Healthcare Research and Evaluation Team
 - 5.63.5 Partners Healthcare Sample Recent Telemonitoring Projects
 - 5.63.6 Partners Programs In Heart Failure, Hypertension, Diabetes And Other Chronic Conditions
 - 5.63.7 Partners Healthcare Center for Connected Health
 - 5.63.8 Partners Healthcare Massachusetts General
- 5.64 Philips
 - 5.64.1 Phipps Visicu
 - 5.64.2 Philips Addresses Healthcare Landscape
 - 5.64.3 Philips/Respironics Monitoring Solution
 - 5.64.4 Philips Healthcare
 - 5.64.5 Royal Philips Electronics / Respironics
- 5.65 Polycom Acquires HP Telepresence Business
 - 5.65.1 Polycom Global Leader In Standards-Based Unified Communications
 - 5.65.2 Polycom Cloud-Based UC Solutions
 - 5.65.3 Polycom Buys Hewlett Packard Halo/HVEN Network
 - 5.65.4 Polycom Partnerships

- 5.65.5 Polycom Mobile UC Solutions
- 5.65.6 Polycom Focused Ecosystem Partnerships
- 5.65.7 Polycom Personal Telepresence Solutions
- 5.66 ProConnections, Inc.
 - 5.66.1 ProConnections Telemedicine Systems Enhance the Delivery of Healthcare
 - 5.66.2 Proconnections Quality, Solutions
 - 5.66.3 ProConnections Medical Consultation Systems
- 5.67 Reach Health, Inc.
 - 5.67.1 REACH HealthInc Comprehensive Telemedicine Solution
 - 5.67.2 REACH Comprehensive Solutions
 - 5.67.3 REACH Health Telemedicine
 - 5.67.4 Reach Customers
- 5.68 RS TechMedic BV
- 5.69 Samsung
 - 5.69.1 Samsung Leadership In Core Businesses
 - 5.69.2 Samsung Medical Business
- 5.70 Sandata Technologies, Inc.
- 5.71 STMicroelectronics
 - 5.71.1 Debiotech and STMicroelectronics
- 5.72 Tactio
- 5.73 Teladoc
 - 5.73.1 Teladoc De Facto Standard in Telehealth
 - 5.73.2 Teladoc Affected by Texas Medical Panel Vote to Limit Telemedicine Practices
 - 5.73.3 Texas Board Requires Doctors To Establish A Relationship With Patients Before Giving A Diagnosis Or Prescribing Drugs
- 5.74 TeleAtrics
- 5.75 Trifecta Technologies
- 5.76 TouchPointCare
 - 5.76.1 TouchPointCare Strategic Position
 - 5.76.2 Touch Point Care / Visiting Angels
 - 5.76.3 TouchPointCare Loyola Medical Center
 - 5.76.4 TouchPointCare LHC Group
 - 5.76.5 TouchPointCare Lexington Health Care
 - 5.76.6 TouchPointCare KSB Home Health
 - 5.76.7 TouchPointCare Home Care Health Services
 - 5.76.8 TouchPointCare Health Contact Partners - Wheeling, IL
 - 5.76.9 TouchPointCare Glaxo Smith Kline
 - 5.76.10 TouchPointCare Family Home Care
 - 5.76.11 TouchPointCare Aurora Health Care

- 5.76.12 TouchPointCare Anderson Hospital Home Health Care
- 5.76.13 TouchPointCare Almost Family/Caretenders
- 5.76.14 TouchPointCare Advocate Home Health
- 5.77 Tunstall Healthcare Group
 - 5.77.1 AMAC American Medical Alert Corp.
- 5.78 University of Houston
- 5.79 UST Global
- 5.80 Verizon Technologies
 - 5.80.1 Verizon In The Wireless Market
 - 5.80.2 Verizon Operates Advanced Broadband Backbone Networks
 - 5.80.3 Verizon Owns And Operates Much Of The Infrastructure That Comprises The Internet
 - 5.80.4 Verizon Healthcare
 - 5.80.5 Verizon Telemedicine Remote Health Monitoring And Virtual Clinics
 - 5.80.6 Verizon Telemedicine Access to Telehealth Experts
- 5.81 Veteran's Administration (VA)
- 5.82 VIDAVO S.A
- 5.83 Virtual Health
- 5.84 Vodafone
 - 5.84.1 Vodafone Cloud Features:
 - 5.84.2 Vodafone Greece Network
 - 5.84.3 Vodafone Greece Products and Services
 - 5.84.4 Vodafone Specialized Services And Solutions
- 5.85 VRI
 - 5.85.1 VRI Serves 110,000
 - 5.85.2 VRI Digi Pal
 - 5.85.3 VRI Partnership with Robert Bosch Healthcare
 - 5.85.4 VRI Digi Pal Services to Partners
 - 5.85.5 VRI
- 5.86 Windstream
- 5.87 Selected Providers for Emergency Medical Care Monitoring

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List Of Tables

LIST OF TABLES AND FIGURES

Table ES-1 Factors Driving Tele-Medicine Adoption

Table ES-2 Tele-medicine Clinical Results

Table ES-3 Tele Health Monitoring Problem Solution Aspects

Table ES-4 Tele-Medicine Devices for Clinical Tracking of Chronic Disease Market Shares, Dollars, Worldwide, 2014

Figure ES-5 Tele-Medicine and M-Health Market Forecasts Market Shipments Forecasts Dollars, Worldwide, 2015-2021

Figure 1-1 Remote Monitoring as Standard of Care

Table 1-2 Telemedicine Nursing Stations Typical Telemonitoring Questions

Table 1-3 Remote Patient Monitoring Device Uses

Table 1-4 Clinical Assessment and Response to Alert Provided by Telemonitor

TABLE 1-4 (Continued) Clinical Assessment And Response To Alert Provided By Telemonitor

TABLE 1-5 Clinical Assessment And Actions Taken To Alert Provided By Telemonitor

Table 1-6 Telehealth Solutions Benefits

Table 1-7 Monitoring Used To Take Measurements In Homecare Settings

Table 1-8 Monitoring Measurement Functions In Homecare Settings

Table 1-9 Bosch Recommendations for Innovation Funded By The VA

Table 1-10 Intel Health Guide Functions

Table 1-11 Intel Health Care Management Suite of Software Tools

Table 1-12 NEJM Letters That Critique The Telemonitoring Study

Table 1-13 Physician Notification on CHF Using “SBAR”

Table 1-14 US Healthcare Coverage Legislation Functions

Table 1-15 FDA Enforcement Actions And Remedies

Table 1-16 HIPAA Information Covered Entities

Table 1-17 HIPAA Information That Needs to Be Private

Table 1-18 HIPAA Information Sharing by Health Care Providers

Table 1-19 HIPAA Information Sharing Prohibitions

Table 1-20 HIPAA Information Managed via Court Order

Figure 1-21 HIPAA Privacy and Security Rule and Compliant Process

Table 2-1 Factors Driving Tele-Medicine Adoption

Table 2-2 Tele-medicine Clinical Results

Table 2-3 Tele Health Monitoring Problem Solution Aspects

Table 2-4 Tele-Medicine Devices for Clinical Tracking of Chronic Disease Market Shares, Dollars, Worldwide, 2014

Table 2-5 Tele-Medicine Devices and Services for Clinical Tracking of Chronic Disease Market Shares, Dollars, Worldwide, 2014

Table 2-6 Telemedicine Video Conferencing Telepresence Market Shares, Dollars, Worldwide, 2014

Figure 2-7 Tele-Medicine and M-Health Market Forecasts Market Shipments Forecasts Dollars, Worldwide, 2015-2021

Table 2-8 Tele-Medicine and M-Health Market Forecasts Dollars, Worldwide, 2015-2021150

Table 2-9 Telemedicine and M-Health Market Segments, Clinical Tracking of Chronic Disease, Physician Remote Presence, Smart Phone Apps, and Video Conferencing Telepresence, Dollars, Worldwide, 2015-2021

Table 2-10 Telemedicine and M-Health Market Segments, Clinical Tracking of Chronic Disease, Physician Remote Presence, Smart Phone Apps, and Video Conferencing Telepresence, Percent, Worldwide, 2015-2021

Figure 2-11 Telemedicine Video Conferencing Telepresence Market Shares, Dollars, Worldwide, 2014

Table 2-12 Telemedicine Video Conferencing Telepresence Market Shares, Dollars, Worldwide, 2014

Table 2-13 Telemedicine Relies on Laboratory Testing to Detect Serious Medical Conditions

Table 2-14 Telemedicine Brings Revolution in IT

Table 2-15 Telehealth Directly-Managed Physician Network Advice Functions

Figure 2-16 Telehealth Remote Presence Telemedicine Market Shares, Dollars, Worldwide, 2014

Table 2-17 Telehealth Remote Presence Telemedicine Market Shares, Dollars, Worldwide, 2014

Figure 2-18 M-Health Telemedicine Apps Market Shares, Dollars, Worldwide, 2014

Table 2-19 M-Health Telemedicine Apps Market Shares, Dollars, Worldwide, 2014

Figure 2-20 M-Health Apps Market Forecasts Market Shipments Forecasts Dollars, Worldwide, 2015-2021

Table 2-21 M-Health Apps Market Forecasts Market Shipments Forecasts Dollars, Worldwide, 2015-2021

Table 2-22 M-Health Apps Market Driving Forces

Table 2-23 Healthcare IT Customer Needs and Carrier Service Provider Telemedicine Benefits

Table 2-24 Carrier Service Provider Cloud Telemedicine Advantages

Table 2-21 Tele-medicine Alarm Devices

Table 2-22 Healthcare Decision Support Software Market Shares, Dollars, Worldwide, 2012

Figure 2-23 Healthcare Decision Support Software Market Shares, Dollars, Worldwide, 2012

Table 2-24 The Medicare Tele-health Originating Site Facility Fee and MEI Increase by the Applicable Time Period

Table 2-25 Remote And Wireless Patient Monitoring Device Using Wireless Networks

Table 2-26 Tele-Medicine and M-Health Sensor Market Forecasts Dollars, Worldwide, 2013-2019

Table 2-27 Tele-Medicine and M-Health Carrier Service Provider Cloud SaaS Market Forecasts Dollars, Worldwide, 2013-2019

Table 2-28 Cloud Computing Platform Systems of Engagement Solutions Market Shares, Dollars, Worldwide, 2012

Table 2-29 Drivers for the Adoption of Telepresence Solutions

Table 2-30 Telemedicine Video Conferencing Telepresence Market Shares, Dollars, Worldwide, 2012

Figure 2-31 Congestive Heart Failure (CHF) Patients Worldwide, Forecasts, Number, 2012-2018

Figure 2-32 Diabetes Patients Worldwide, Forecasts, Number, 2012-2018

Table 2-33 Number of Patients with Disease Conditions Requiring Wheelchairs, By Diagnosis, Number, Worldwide, 2012-2018

Figure 2-34 Aging of the Population, 600 Million Elderly Individuals World Wide

Figure 2-35 Tele-medicine Challenge: One Billion Adults Over Weight, 86 Million Individuals with Chronic Conditions

Figure 2-36 Global Obesity

Figure 2-37 Tele-medicine Goal: Improve Lifestyle Choices

Table 2-38 US Stroke Incidence Numbers

Table 2-39 Physical Therapy Enhances Recovery After Hip Injury

Table 2-40 Tele-medicine Market Driving Forces

Table 2-41 Tele-Medicine Critical Issues Addressed

Table 2-42 Tele-medicine Adoption Rate Issues And Concerns

Figure 2-43 Tele-medicine Market Factors

Table 2-44 Tele-Medicine Program Benefits

Figure 2-45 Telemedicine and M-Health Regional Market Segments, 2014

Table 2-46 Telemedicine and M-Health Regional Market Segments, 2014

Table 2-47 Tele-medicine Adoption Rate Issues And Concerns

Figure 3-1 Bosch Health Buddy

Table 3-2 Bosch Health Buddy Patient Conditions Monitoring

Figure 3-3 Bosch Health Buddy System

Figure 3-4 Bosch Health Buddy Workflow Workflow

Table 3-5 Bosch Health Buddy System Workflow

Figure 3-6 Bosch Health Buddy System for Diabetes

Table 3-7 Bosch Health Buddy System Components

Figure 3-8 Bosch Health Buddy Decision Support Dashboard and Heat Map

Figure 3-9 Bosch Decision Support

Table 3-10 Bosch Healthcare Telemedicine Solution

Table 3-11 Bosch Health Buddy System Patient Uses for Custom Messaging

Table 3-12 McKesson / Bosch Telemedicine Advisor Benefits

Table 3-13 McKesson / Bosch Telemedicine Advisor Features

Figure 3-14 Viterion Provides Value by Reducing Bed Days by 50%, and by Reducing Hospital Admissions by 35%

Figure 3-15 Viterion Provides Value by Connecting Patients To Their Caregivers

Figure 3-16 Viterion Improves Healthcare Delivery Affordability

Figure 3-17 Viterion Digital Health Vitacast 1000 Telemedicine Device Individualized Features

Figure 3-18 Viterion Digital Health Vitacast 1000 Telemedicine Target Markets

Figure 3-19 Viterion Vitacast 1000 Patient Device

Table 3-20 Viterion Vitacast 1000 Partner Benefits

Figure 3-21 Value VA Delves From Viterion Telehealth Solutions

Figure 3-22 Viterion Telehealth Solutions Functions

Table 3-23 Viterion Tele-medicine UK Department of Health (DOH) Initial Findings from Whole System Demonstrator (WSD) Program

Figure 3-24 Viterion Wireless Vital Sign Monitor Patient Benefits

Figure 3-25 Viterion Telehealth System

Table 3-26 Viterion Telemedicine Monitor Measurement Of Vital Signs:

Table 3-27 ViterionNET Administrator Features:

Table 3-28 ViterionNET Healthcare Provider Features:

Table 3-29 Honeywell Lifestream Manager Functions

Table 3-30 Honeywell Lifestream Telemedicine Manager Features

Table 3-31 Honeywell Chronic Disease Conditions Monitored For Remote Patients

Table 3-32 Honeywell Genesis Touch Key features

Table 3-33 Honeywell Homemed Health Monitoring System Vital Signs Features

Table 3-34 Honeywell Homemed Health Monitoring System Features

Table 3-35 Honeywell Homemed Health Monitoring Med Partner System Features

Table 3-36 Honeywell Homemed Health Monitoring System Criteria for Monitoring

Table 3-37 Honeywell Health Monitoring System Functions

Table 3-38 Honeywell Recommended Criteria for Monitoring

Figure 3-39 Care Innovations Telemedicine Tablet Device

Figure 3-40 Care Innovations Telemedicine Devices

Figure 3-41 Care Innovations Telemedicine Monitoring Blood Pressure

Figure 3-42 Care Innovations Telemedicine Monitor Screen
Figure 3-43 Care Innovations Telemedicine Video Conferencing
Figure 3-44 Care Innovations Telemedicine Monitor
Figure 3-45 Medtronic / Cardiocom Telehealth Call Centers Supported
Table 3-46 Features Of Cardiocom Commander Flex :
Figure 3-47 Cardiocom Telescale
Table 3-48 Cardiocom Telescale Features:
Figure 3-49 Cardiocom Glucocom & Autolink
Table 3-50 Cardiocom's Diabetes Management System Features:
Figure 3-51 Cardiocom Teleresponse
Table 3-52 Cardiocom Teleresponse Features
Figure 3-53 Cardiocom Net response
Table 3-54 Cardiocom Netresponse Devices Supported
Table 3-55 Cardiocom Netresponse Features:
Figure 3-56 Cardiocom Linkview
Table 3-57 Cardiocom Linkview Features:
Figure 3-58 Philips Telehealth System
Figure 3-59 Philips Secure Telemedicine Data Infrastructure
Table 3-60 Philips HeartStart Telemedicine Benefits for Receiving Hospitals
Table 3-61 Philips HeartStart Telemedicine Benefits for EMS
Table 3-62 Application Server: Systems Integration Features
Table 3-63 Philips IntelliVue Application Server Functions
Table 3-64 Value of Philips Home Telemonitoring
Figure 3-65 Philips Decision Support for Home Telemonitoring
Figure 3-66 Global Med WallDoc
Table 3-67 GlobalMed's WallDoc Solution Benefits
Figure 3-68 GlobalMed Telemedicine Carts | Mobile Medical Stations
Table 3-69 GlobalMed Mobile Medical Carts LiteExam Features
Table 3-70 GlobalMed Mobile Medical Carts LiteExam Benefits
Figure 3-71 GlobalMed Telemedicine Cart Components
Figure 3-72 GlobalMed Telemedicine Carts Mobile Medical Stations
Figure 3-73 GlobalMed Telemedicine Cart | Mobile Medical Station
Figure 3-74 GlobalMed i8500 Teleaudiology Station
Figure 3-75 GlobalMed Telehealth Cameras
Figure 3-76 GlobalMed TotalExam HD Examination Camera
Figure 3-77 TotalExam Examination Camera
Figure 3-78 GlobalMed iREZ i5770 PTZ Camera
Table 3-79 CDAC MercuryTM Web Telemedicine Features
Table 3-80 MERCURYTM Web Telemedicine Parameters

Figure 3-81 Mercury Web Telemedicine

Table 3-82 Cisco HealthPresence Functions

Figure 3-83 Cisco TelePresence System 3200 Series

Table 3-84 Cisco TelePresence System 3200 Functions:

Figure 3-85 Cisco Hospital Video Surveillance

Table 3-86 Polycom h Closes Distance Barriers

Figure 3-87 Polycom Telehealth

Figure 3-88 Polycom RealPresence Cloud Collaboration Center

Table 3-89 Polycom Real Presence Cloud Collaboration Center Features

Table 3-90 Polycom RealPresence Cloud Collaboration Center Two Seater Components

Table 3-91 Polycom RealPresence Cloud Collaboration Center Four Seater Components

Figure 3-92 Vidyo Conferencing Extending the Reach Of Healthcare

Figure 3-93 Vidyo Telehealth Solutions

Figure 3-94 Vidyo Telemedicine Solutions

Table 3-95 Vidyo for Healthcare Applications:

Figure 3-96 Vidyo API

Figure 2-97 Telemedicien Healthcare Workflow Management

Table 3-98 Huawei Telemedicine Development Benefits:

Table 3-99 FDA Cleared Mobile Medical Applications Last updated (February 17, 2015)

Table 3-100 FDA Apps Examples of MMAs Regulated

Figure 3-101 MedApps HealthPAL

Figure 3-101 iRobot Autonomous Navigation Robot

Table 4-1 New England Journal of Medicine (NEJM) Sarwat I. Chaudhry, M.D
Telemonitoring Research and Letters That Critique The Study

Table 4-2 Evident Health Services Target Patient Metrics, Best Practice Targets Blood Pressure, Blood Lipids

Table 4-2 (Continued) Evident Health Services Target Patient Metrics, Best Practice Targets Blood Pressure, Blood Lipids

Table 4-3 Evident Health Services Target Patient Metrics, Best Practice Obesity and Insulin Targets

Table 4-4 Partners Healthcare Tele-Monitoring Benefits

Figure 4-5 Medtronic CareLink Disease Management

Figure 4-6 Medtronic Device Monitoring and Disease Management

Figure 4-7 Device Follow-up and Disease Management

Figure 4-8 Medtronic Cardiac Implantable Device Monitoring Heart Failure Guidelines

Figure 4-9 Viterion Device for Tele-Health Monitoring

Figure 4-10 Continua Interfaces and Standards for Telemedicine

Figure 4-11 Continua Telemedicine Ecosystem Development
Figure 4-12 Continua Personal Connected Healthcare Solution
Figure 4-13 Payer Impact on Telemedicine
Figure 4-14 PPACA Telemedicine Quality Improvement
Figure 4-15 Philips Telemedicine Operating Model
Table 4- 16 Healthcare Education: Value Categories and KPIs
Table 4-17 Telemedicine Accessibility Functions
Table 4-18 Healthcare Delivery In A Community Context
Table 4-19 Health Information Exchange services Example Solutions
Table 4-20 Health Information Exchange Services Benefits
Table 4-21 Home-Based Care Telemedicine Benefits
Table 4-22 Mobile Health Care Solution
Table 4-23 Mobile Office Solutions
Table 4-24 Telehealth Readiness Assessment System Functions
Table 5-1 A&D Positioning:
Figure 5-2 A&D Wellness Connected Solutions
Figure 5-3 A&D Wellness Connected Wireless Precision Scale
Figure 5-4 A&D Wellness Connected Wireless Blood Pressure Monitor
Figure 5-5 Apple iWatch
Table 5-6 AT&T Mobile Security Benefits
Table 5-7 AT&T Virtual Care Benefits
Table 5-8 AT&T Imaging in the Cloud Benefits:
Figure 5-9 AT&T Medical Imaging and Information Management
Table 5-13 Authentidate Holding Positioning and Risks
Table 5-14 Cardiocom Patient Conditions For Telemonitoring And Disease Management
Figure 5-15 Continua Telemedicine Board Members
Figure 5-16 Continua Telemedicine Promoter Members
Figure 5-17 Continua Telemedicine Challenges
Table 5-18 Key Components of Evident Health Services Methodology
Table 5-19 Key Components of Evident Health Services Collaboration
Table 5-20 Gemalto / Cinterion Wireless Module Functions
Figure 5-21 Cinterion Global Interoperable Personal Health Solutions Architecture
Figure 5-22 Gemalto / Cinterion Wireless Data Transmission
Table 5-24 Honeywell Genesis Touch Key features
Table 5-25 Huawei Enterprise Business Overview
Table 5-26 IBM Business Goals
Table 5-27 Intel Enables Energy-Efficient Performance, Connectivity, And Securitywith Innovation

Table 5-28 Intel Enables -Efficient Performance Computing Innovation
Table 5-29 JSC CEM Technology
Table 5-30 CEM-ThermoDiagnostics Personal Thermograph Target Audience and Aims
Table 5-31 Personal thermograph “CEM-ThermoDiagnostics” for Professional And Domestic Use
Table 5-32 Prices for ???-ThermoDiagnostics Personal Thermograph:
Figure 5-33 Kaiser Thrive Campaign
Table 5-34 Kaiser Services
Figure 5-35 Kyrocera Chemical Business
Table 5-36 Logitech LifeSize UVC Platform Features
Table 5-37 Mayo Clinic Services
Table 5-38 McKesson Telehealth Advisor Critical Issues Addressed
Table 5-39 McKesson Telehealth Advisor Clinical Results
Table 5-40 MedApps Products
Table 5-41 MedApps System Features
Figure 5-42 Medtronic EMR Systems
Figure 5-43 Medtronic Carelink Value Propositions
Figure 5-44 NSD Target Field e Finance and Insurance Sectors
Table 5-45 Partners Healthcare Connected Health Consulting Services
Table 5-46 Partners Healthcare Heart Failure, Hypertension, Diabetes And Chronic Condition Programs
Table 5-47 Philips Positions To Simplify Global Healthcare Delivery For The Long Term
Table 5-48 Philips Healthcare Delivery Product Positioning
Figure 5-49 ProMCS-3000 Medical Consultation System
Table 5-50 ProConnections Technical Specifications
Figure 5-51 Samsung Revenue By Segment
Table 5-52 Tactio Health Group mHealth and BYOD Models
Table 5-53 TeleAtricsChildcare Center Features
Table 5-54 TouchPointCare
Table 5-55 TouchPointCare Goals
Figure 5-56 Verizon University of Virginia Remote Telemedicine Program
Table 5-57 Vidavo Positioning
Figure 5-58 Virtual Health Population Health Management Platform
Table 5-59 Vodafone Cloud Features
Table 5-60 VRI Units Monitored
Table 5-61 VRI Services to Partners

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