

A Market Observatory for the AAL Market
 Gabriella Cattaneo, IDC European Government Consulting
 AAL Forum 2014 - September 10th 2014, Bucharest

- contribute to bridge the gap between R&D&I and successful commercialisation of new solutions

The Market Observatory would provide market intelligence support on AAL solutions to the community of stakeholders, throughout the AAL projects lifecycle



A Market Observatory for the AAL Market

Gabriella Cattaneo, IDC European Government Consulting

AAL Forum 2014 - September 10th 2014, Bucharest

A Study by IDC and Kurt Salmon for the AALA

IDC and Kurt Salmon carried out a preliminary feasibility study for a Market Observatory in the AAL

Aiming at supporting the AALJP to:

- enhance the market orientation of the JP
- contribute to bridge the gap between R&D&I and successful commercialisation of new solutions

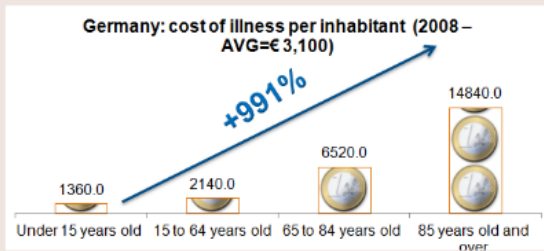
The Market Observatory would provide market intelligence support on AAL solutions to the community of stakeholders, throughout the AAL projects lifecycle



Technology innovation: new ICT solution, technology patterns

Socio-economic drivers: relentless increase of social and health care costs, less public money but more "out of pocket" private money

The AAL Market is growing beyond its traditional boundaries



#1 Integrated care will drive 50% of healthcare providers IT spending growth

- Integrated care to enable sustainability and appropriateness
- Collaboration = funding
- Healthcare providers who will not consider their role in the wider ecosystem will fail
- Third platforms will emerge as enabler of integrated care

Integrated care building blocks

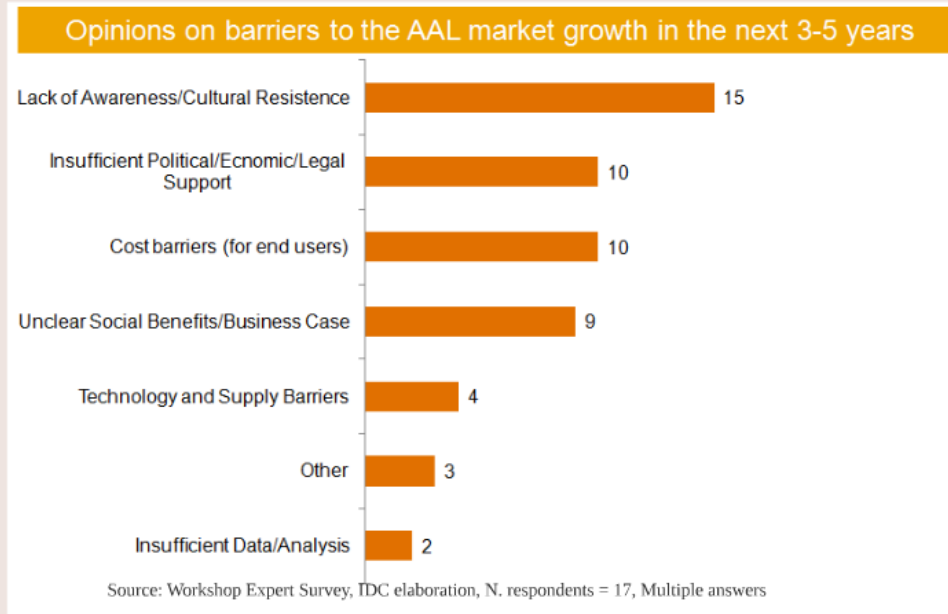




In a workshop we asked stakeholders about their needs to face the AAL market...



...This is what they said



The lack of information and transparency can influence negatively the development of the market



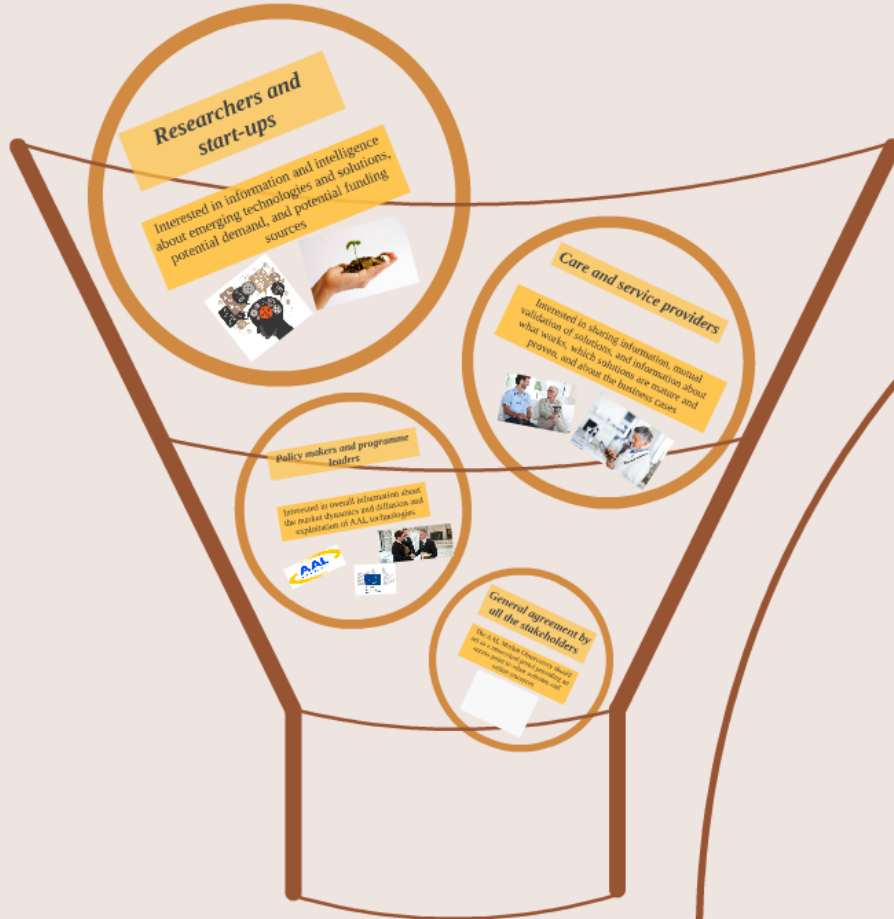

In a workshop we asked stakeholders about their needs to face the AAL market...

Better market intelligence can help overcome many of the barriers slowing down the adoption of AAL solutions



A Market Observatory could be the solution to help filling these information gaps

Stakeholders have different views and priority information needs for the Observatory



Our vision of the AAL Market Observatory

Scope	Promoters	Observatory "clients"
Market Segments (i) Ageing in the workplace, (ii) Ageing in the (iii) ...	AALA and other AAL JP actors EC DG CONNECT / H2020	Policy Stakeholders EIP AHA, More years, better lives JPI EIT KCI "Innovation for active ageing", National AAL

Intelligence can help
the barriers slowing
of AAL solutions



- library of coherent and updated
- offering data for the total EU

Stakeholders have different views and information needs for the C...

Researchers and start-ups

Interested in information and intelligence about emerging technologies and solutions, potential demand, and potential funding sources



Care and service providers

Interested in sharing information, validation of solutions, and information on what works, which solutions are proven, and about the business case



Policy makers and programme leaders

Interested in overall impact on the market

ence
olutions,
al funding



Care and service providers

Interested in sharing information, mutual validation of solutions, and information about what works, which solutions are mature and proven, and about the business cases



Prezi
makers and programme
leaders

all information about
and diffusion and
technologies



Interested in sharing
validation of solutions
what works, which solutions
proven, and about the



**Policy makers and programme
leaders**

Interested in overall information about
the market dynamics and diffusion and
exploitation of AAL technologies



**General agreement by
all the stakeholders**

The AAL Market Observatory
act as a networked platform
access point to
only

n about
usion and
mologies

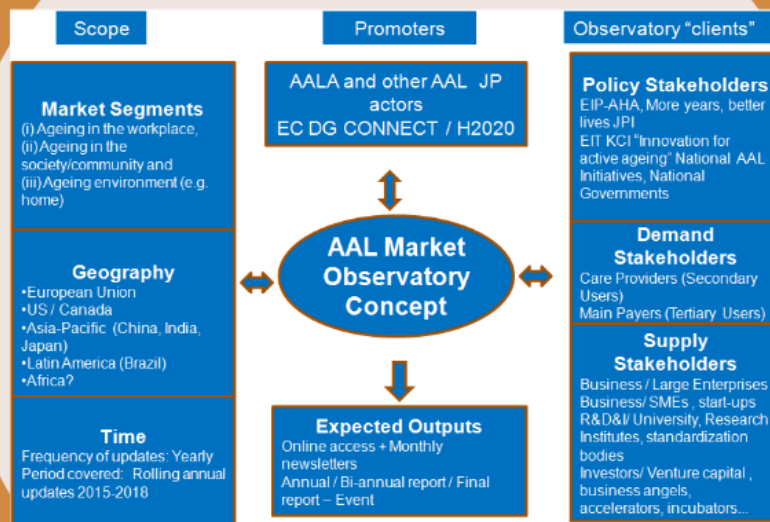


General agreement by all the stakeholders

The AAL Market Observatory should
act as a networked portal providing an
access point to other websites and
online resources



Our vision of the AAL Market Observatory



We designed 2 alternative models for the Market Observatory

Option A for the AAL Market Observatory



Value Proposition:

The main reference source of trusted and high quality and added-value information and data on the market

Main Features:

- library of coherent and updated core market data
- offering data for the total EU and possibly for single MS
- monitoring of the market evolution (players, world regions and investments)
- organization of high-level annual event

Business Model:

- Mix of sponsorship and pay-as-you-go services.
- Sponsors will cover start up costs
- The Observatory should be run by a professional organization and a scientific steering committee
- Methodology, and quality of data and information should be revised once a year

Option B for the AAL Market Observatory

Value Proposition:

The best known digital catalogue and content aggregator of the AAL Market.



Main Features:

- A single point of access to databases, sources and news on the market.
- publish lively blogs, posts and comments to data in the main EU languages
- support stakeholders in making informed decisions
- foster communication and interaction through a community approach

Business Model:

- Low cost based on gathering free available data and partnering with other databases
- start up costs paid covered by EC and other sponsors
- advertising and sponsors for additional funding

Our Final Recommendations to the AALA

- There is an objective need for information and data on the AAL market. The AALA should proceed with its plans for a Market Observatory
- The Market Observatory should monitor 4 core areas to provide market intelligence
- We suggest implementing the Option A for the Observatory as a high-level source of trusted information and data
- The alternative model (the AAL digital catalogue) is lighter in structure, with a narrower focus, and lower costs



Thank you!

Kurt Salmon ✨

IDC Contact

Gabriella Cattaneo gcattaneo@idc.com

Kurt Salmon Contact

Débora Di Giacomo debora.digiacomo@kurtsalmon.com