CONSUMER & HEALTH MANAGEMENT INFORMATION SYSTEMS (CHS) – SECURITY, CONSUMERIZATION, DATAFICATION

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Consumer & Health Management Information Systems – Profile & ambition

Consumer & Health Management Information Systems

	LTM 06/20	yoy
Revenue (€m)	47	+19%
EBITDA adjusted (€m)	11	+57%
Margin	23%	+6ppt

Business Focus

- Providing consumers with digital health solutions
- Offering a digital health platform – our **CGM LIFE ecosystem**
- Establishing an interface between doctors & patients – our **CLICKDOC solutions**
- Delivery of **big-data value** for **pharma, insurances, doctors** and **patients**
- **Supporting our customers regarding IT security on their path to increasing digitization**
- Steering the **TI product development** and **rollout**

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Telematics Infrastructure – Providing our customers with **secure connectivity**

99.9%
Stable and resilient TI connector

1st
mover e-Health connector

>5,000
orders in pharmacy segment

1st
KIM provider

99.9% of **CGM TI connectors stayed connected** during the TI outage in May.

This is attributable to our **intensive R&D efforts & thorough testing** of our connector hard- and software.

CGM connector **approved** by gematik **in July**. Upgrade available for all ~**56k customers**. So far ~**20k upgrade installations**.

Upgrade **enables**
- Value added **TI services**
- TI for **pharmacies**

1st mover in **TI for pharmacies**. Rollout started in July.
> **5k orders** received by CGM Lauer and reseller partners by now.

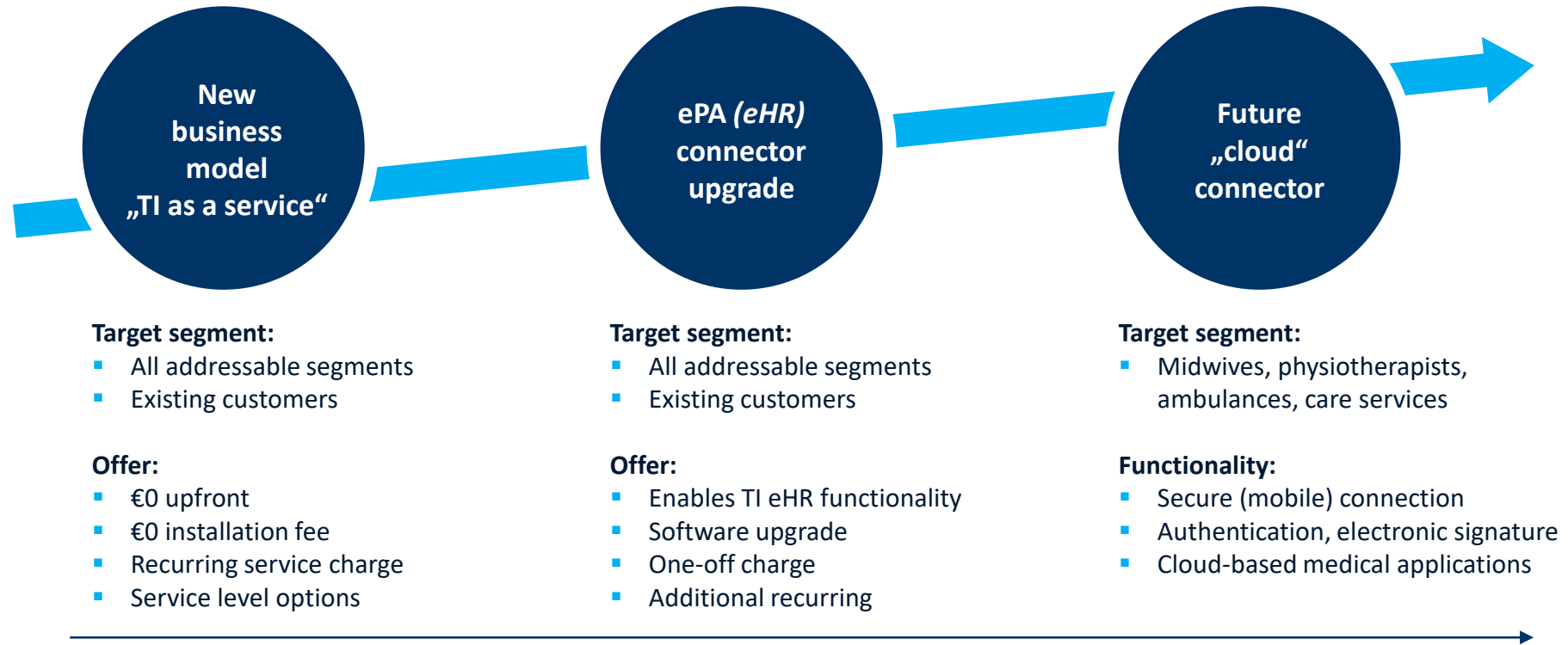**Installations** picking up at increasing speed.

CGM KIM (secure TI email) **approved** as 1st provider by gematik **in June**. Rollout to begin early Q4/2020.

KIM is **mandatory** for the **digital transfer** of relevant patient documents like the future **e-sick notice**.

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Telematics Infrastructure – **Evolving our products**

New business model „TI as a service"

ePA *(eHR)* **connector upgrade**

Future „cloud" connector

Target segment:
- All addressable segments
- Existing customers

Offer:
- €0 upfront
- €0 installation fee
- Recurring service charge
- Service level options

Target segment:
- All addressable segments
- Existing customers

Offer:
- Enables TI eHR functionality
- Software upgrade
- One-off charge
- Additional recurring

Target segment:
- Midwives, physiotherapists, ambulances, care services

Functionality:
- Secure (mobile) connection
- Authentication, electronic signature
- Cloud-based medical applications

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We **secure** our customers on their path to increasing digitization

Security-threats for our **customers**

- **Increasing number** of **cyber attacks** in healthcare
- Attackers **shut down practices** or **steal patient data** records
- Strong negative effects of **damaged reputation**
- **Enormous cost** for practice reactivation

German government plans **regulative measures** for **practices & hospitals**

Extra federal and state funding programs to **enhance IT security** (latest initiative law for future clinical digitization)

IT security regulation based on BSI standards for practices

CGM Solution

- **#fightcybercrime** campaign
- Supporting customers **re-compliance with upcoming regulation**
- **Monetization** through **security product bundles:**
  - **Tailored portfolio** to improve customers' IT security (Telemed Protect Silver, Gold, Platin)
  - **24/7 – alert service** in case of security incidents
  - **Security audits** and **checks**

TELEMED @

#fightcybercrime

GEMEINSAM FÜR MEHR IT-SICHERHEIT IM DEUTSCHEN GESUNDHEITSWESEN.

Cyberkriminalität kann jede Praxis treffen – auch und gerade in Krisenzeiten

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Consumerization – Patients are increasingly taking an active role in the **ecosystem**

Consumerization of Healthcare

31 million
people in Germany suffer from **chronic diseases** [1]

527 million wearables
to be **sold globally** by 2024 [3]

75%
of smartphone owners **use health apps** [2]

41%
of smartphone owners would want to get a second opinion from an **artificial intelligence** [4]

Doctors' increasing need for digitization

- **Less availability** of practice **personnel**
- **Shortage** of rural **physicians**
- **Cost pressure**
  → Need for **efficient, digital services**

COVID-19 additional booster for digitization

- Need for **remote treatments & monitoring**
- **Digitally integrated therapies** (e.g. for chronical diseases)
- **Regulatory push** for increasing digitization

CGM LIFE Ecosystem

CLICK·DOC ONLINE BOOKING

CLICK·DOC VIDEO CONSULTATION

CGM LIFE Patientenakte

CGM LIFE Partnerprogramm

MEDICITALIA⁺

HEALTHCENTER

1. CGM „DMP Programme für Chroniker (GKV-ca. Angaben)", August 2019
2, 4: Bitkom e.V. „Bitkom Digital Health 2020", 2020, Bitkom Research
3. IDC Corporate USA, "Worldwide Wearable Computing Device Forecast", March 2020, IDC

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CGM LIFE with eHR – Our new digital ecosystem addressing evolving consumerization
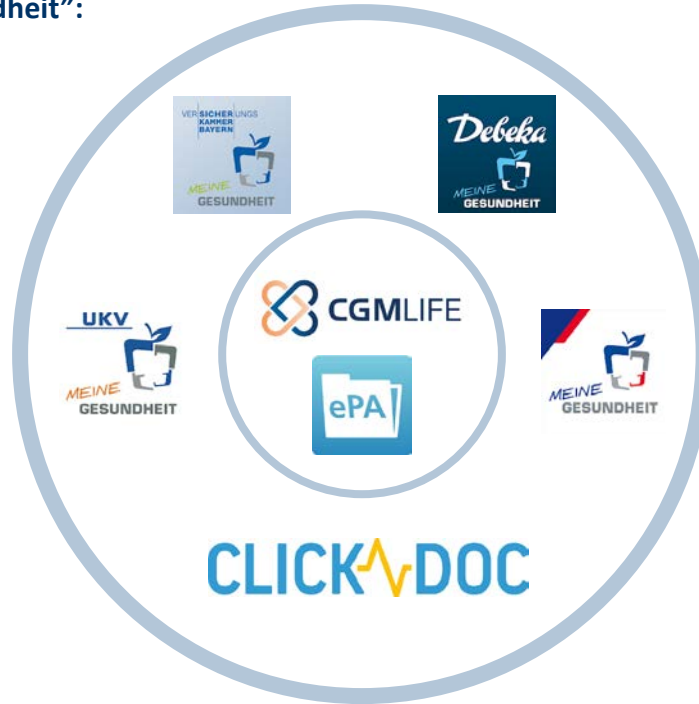
CGM eHR Joint-Venture "Meine Gesundheit":

45%

Market share of privately-insured persons

Multiple services for private health insurances through the **Joint Venture** "Meine Gesundheit"

Private insurance companies **entering** the **Telematik Infrastruktur in** 2021 → **new revenue opportunities** to serve customers with **TI services**

1
ecosystem

CGM LIFE

	ePA
■ Deeply integrated with CGM ecosystems (PIS) ■ Analytics, digital campaigning, digital invoice management as value added services for insurance companies	■ Highly interoperable based on the regulatory initiatives ■ Increasing reach through the whole German eHealth ecosystem as a booster for general acceptance of eHR solutions

# Consumerization – CGM LIFE platform economy and strategy

Ecosystem approach

- **Multi-platform** ecosystem based on a strong **partnership strategy**
- Enabling **big corporates and insurances** to bring the best eHealth experience to **their employees and customers**
- **Monetizing reach** through **targeted advertising**

Partner app strategy

- **Providing B2C eHealth solutions** access to healthcare professionals
- **Integrating all services** in combination with CGM LIFE Platform and CLICKDOC
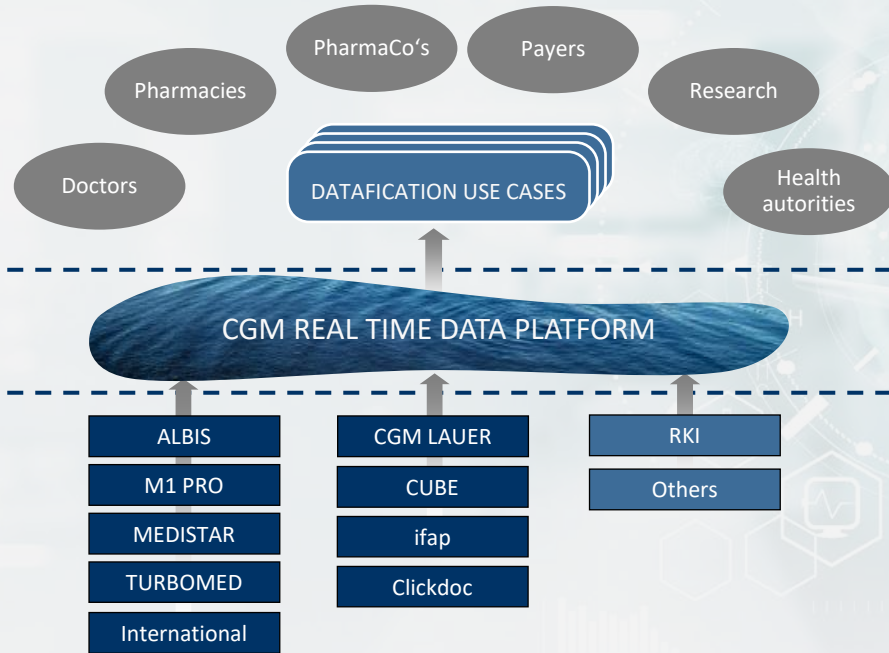- **Monetizing reach** of **eHealth store**

Secure technical platform

- Enabling partners to use **secure** and **scalable medical cloud technology**
- Providing **access** to already **existing data of a patient**
- Leading in a **unique** and **comprehensive patient journey**
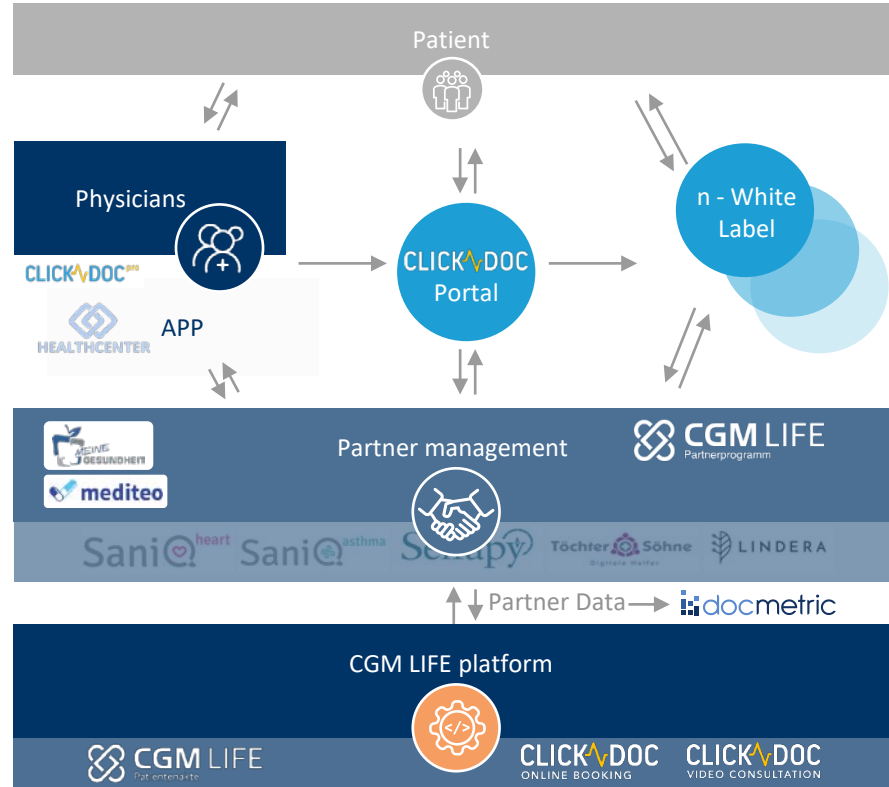
CGM Core assets and evolution towards datafication

WE ARE WORKING TOWARDS INTEGRATION OF REAL-TIME HEALTHCARE DATA FROM MULTIPLE SOURCES…

Pharmacies

PharmaCo's

Payers

Research

Doctors

DATAFICATION USE CASES

Health autorities

CGM REAL TIME DATA PLATFORM

ALBIS	CGM LAUER	RKI
M1 PRO	CUBE	Others
MEDISTAR	ifap	
TURBOMED	Clickdoc	
International		

… TO ENABLE HEALTH CARE PROVIDERS TO MAKE DATA-BASED IMPROVEMENTS TO HEALTH WELFARE

Datafication drivers

- **Data value**: key healthcare innovation areas like value based healthcare, evidence based medicine, personalized medicine, rare disease detection, ML-/AI-based clinical decision support etc. all require access to large fit-for-purpose datasets

- **Data availability**: rapidly increasing availability of health data (MedTech, apps, wearables, clinical trials) calls for data integration and analytics in horizontal data platforms

CGM assets

- **Access to healthcare provider systems and industry relationships** in 56 countries

- **Real-time interfaces** to practice and hospital management systems, existing platform for data aggregation, integration and analytics

- **Products** to deliver benefits to doctors in exchange for GDPR compliant, anonymized data sharing

- **~3k doctors** already contributing to CGM data platform through AIS systems (and growing), sending > 300k new datasets/day

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Multi-platform with excellent assets for datafication

REAL WORLD DATA IN REAL TIME

Trend detection for medical decision support	**For patients, doctors, insurances, pharma**

Outpatient data cockpit & pandemic monitor

Practice monitor

IFAP Praxiscenter & VOS

THERAFOX & data hub

Marketing & business intelligence	**For pharma**

Measured advertising

Pharma sales dashboard

Rare disease finder

Data brokerage & data panels	**For data platforms**

IQVIA™

hm+R HEALTH MARKET RESEARCH

INSIGHT HEALTH™

ROBERT KOCH INSTITUT

INTERNATIONAL SCALING   🇩🇪 GERMANY   🇮🇹 ITALY   🇫🇷 FRANCE   🇦🇹 AUSTRIA   🇨🇿 CZECH   … and more to come

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CGM ideally set for driving customers' security, consumerization & datafication

SECURITY

- **First-class reliability** e.g. with **99.9% stable and resilient TI connector**
- **Extension** of TI to **Pharmacies** and **value added services** and **Rollout of CGM KIM**
- Connectors will support **eHR and eRX functionality** and **mobile connections**

CONSUMERI-ZATION

- **Consumerization** in healthcare is **increasing strongly**
- **CGM well-positioned** in **digital health solutions** (CGM LIFE ecosystem and CLICKDOC)
- **45% market share** of privately insured persons with eHR joint-venture **"Meine Gesundheit"**

DATAFICATION

- Delivery of **big-data value for pharma, insurances, doctors and patients**
- CGM has **access** to one of the **most comprehensive data sources for the outpatient sector**
- **Significance** for **medical decision support, data brokerage** and **data panels**

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