

Healthcare IT Sector Highlights (August - October, 2014)

Consumer Healthcare

Wearable health/fitness devices continue to enter the market one after another.

The following developments have occurred since our last update in February 2014.

- Toshiba's WERAM1100 entered the market in August 2014. The wristband device keeps track of sleep, activity levels, and diet. The device is designed to operate for 2 weeks on a single charge, leveraging Bluetooth 3.0/4.0. Toshiba is also an OEM of similar devices for the Japanese mobile operator NTT DoCoMo.
- Tanita's Calorism is a connected pedometer which keeps track of steps, activity levels (walking, running, relaxed) and calories consumed. The device works in synchronization with Tanita's health meter (body scale) to allow browsing of personal data on a TV or smartphone screen.
- The semiconductor manufacturer Renesas unveiled its ambitions in the already crowded market. Their device is embedded with three types of sensor to measure pulse, body temperature and 9-axis acceleration, along with a Bluetooth Low Energy chip and configurable smart analog IC. The company is currently collaborating in research with Internet of Things players into lifelogs, freight sensing, and surveillance solutions.
- Adidas Japan began selling the MiCoach wristband to keep sport and fitness training records. The wristband has customized training menu setting capability.

In this context, there was at one point a rumor that Nike was withdrawing from the market, and laying off its wearables team. The company denied the rumor, saying “we will sell and support the Nike+ FuelBand SE for the foreseeable future,” leaving some ambiguity through its choice of the phrase “foreseeable future.” In fact, the device is still available in the Japanese market.

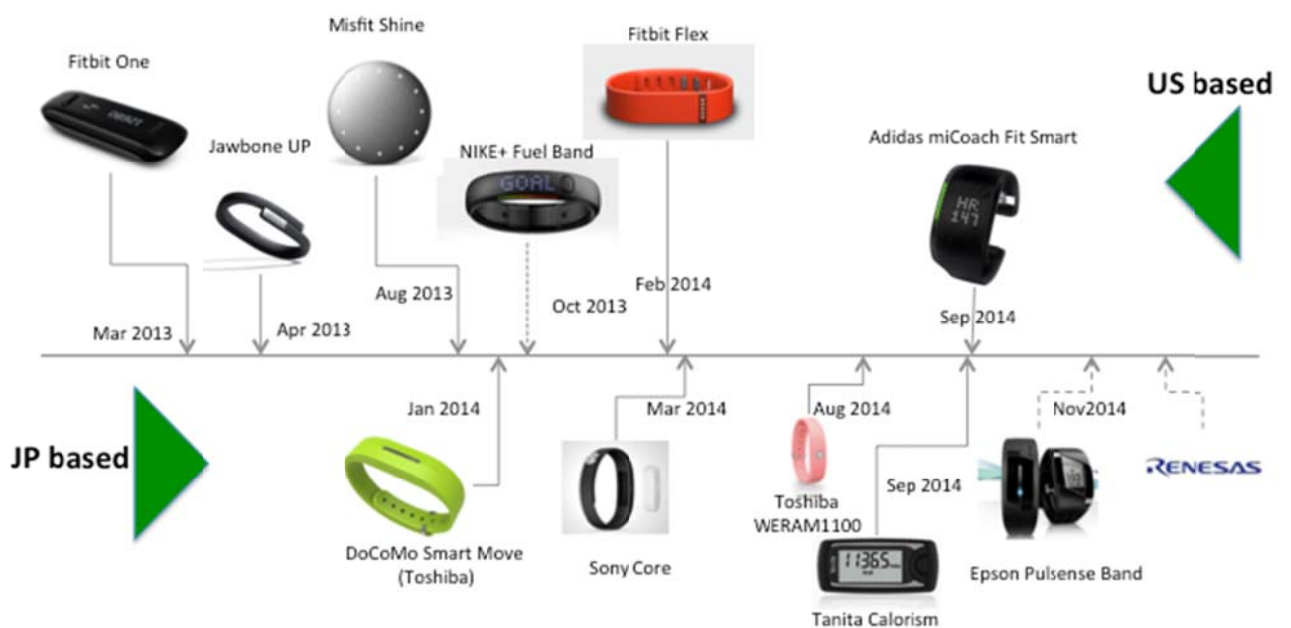


Figure 1: Wearable health tracking device market entry timeline, October 2014 (images by manufacturers)

The healthcare features of iOS 8 may act as a following wind, especially for the specialty wearable devices by various manufacturers featured and sold in Apple stores. Availability of the versatile centralized control app may spur the adoption of add-on devices which have already established some presence in the industry. Despite the hype and number of entrants, the market has not yet reached critical mass.

Regulation

The Good Health Software Promotion Council (GHS) was launched in August 2014 by the following 3 entities: The Japan Electronics and Information Technology Industries Association, The Japan Medical Imaging and Radiological Systems Industries Association, and The Japanese Association of Healthcare Information Systems Industry. GHS performs three sets of activities.

1. The stipulation of health software development guidelines. GHS defines health software as “software used to manage, control, and improve personal health and medical care provisioning”
2. The announcement and operation of self-imposed rules to comply with the guidelines
3. The execution of guideline awareness programs and the provision of education

GHS guidelines cover risk management, quality management, the safety of health software products, and software lifecycle processes. GHS marks will be awarded to software depending on its level of compliance with the guidelines.

Recent tech developments:

Smart prescription book

The major pharmacy chain Nihon Chozai announced the availability of “Okusuritecho Plus” (prescription record book), jointly developed with the medical IT startup company Mediade.

Its basic functions are as follows:

- Automated updating of prescription information every time a patient visits a pharmacy

- The provision of detailed information regarding prescribed medicine, and the availability of alternative generic medicines
- Facilitating browsing on PC and smartphone screens

The “Plus” features include:

- A personalized health control system
- A calendar and reminders to attend hospital or take medicine
- Near-Field Communication capability to allow operation with medical equipment
- The transfer of prescription information to nearby pharmacies in order to reduce waiting time

Genetic testing service

DeNA Life Science, a subsidiary of major social game company DeNA has started the genetic testing service MYCODE. MYCODE reads the genetic information of the user in order to statistically assess the risk of 40 types of cancer and 25 types of lifestyle disease, as well as of other diseases, obesity, and skin problems by referring to more than 400 sources of medical information. The service has three levels:

- Body 30+ (JPY9800): displays 30 data points related to obesity, skin quality, and hair quality
- Healthcare 100+ (JPY19800): displays 100 checkpoints such as cancer/lifestyle disease risks.
- All in One 280+ (JPY29800): full menu

Seamless integration of scattered medical information

Wiseman – a Japan-based manufacturer of electronic health record-keeping and (elderly) care software – announced Mell+, a cloud service which enables

centralized control of medical and (elderly) care information which has been historically stored and protected separately. Sharing of the information enables up-to-date information exchange between physicians / caregivers and smooth transition for patients.

Sources/References:

Consumer healthcare

- [Nike Denies Fuelband Shutdown](#)
- [Toshiba](#) (Japanese)
- [Tanita](#) (Japanese)
- [Adidas](#) (Japanese)
- [TechOn](#) (Japanese)

Regulation

- [GHS Release](#) (Japanese)
- [GHS Homepage](#) (Japanese)

Recent developments

- [Nihon Chozai](#) (Japanese)
- [MYCODE](#) (Japanese)
- [Wiseman](#) (Japanese)