

TATA ELXSI

Telehealth solutions available in APAC market

Digital Health | Healthcare & Lifesciences BU

Report Presented BY:

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1. Organization Learnings

Technology + Design

Tata Elxsi is a global leader in design and technology services industries, including automotive, broadcast, communications, healthcare, and transportation.

Founded on May 5, 1989, in Bangalore. Manoj Raghavan is the CEO and Managing Director.

It brings together the latest technology and user-centric design expertise to assist companies in delivering innovative solutions and exceptional customer experiences.

Healthcare Products & Services
Integrated design and engineering, Digital and Connected health, Regulatory compliance

Key Learnings

- ❖ Secondary Desk Research about telehealth and its available platforms, its market segmentation, features & pricing
- ❖ Identifying the gap area for TEngage, brainstorming on more list of features
- ❖ Strategic thinking and brainstorming over the marketing strategy and producing a sustainable plan for TEngage. analyzing the competitors thoroughly and finding entry point
- ❖ Planning of geo-specific business model by summarizing and drawing insights from all our study from start.
- ❖ Putting down all thoughts on how to make TEngage a good market product



2. Study Report

Introduction



Telehealth is “the use of electronic information and telecommunication technologies to support and promote long-distance clinical health care, patient and professional health-related education, public health and health administration.”

Telehealth is frequently used interchangeably with telemedicine and eHealth. Telehealth, on the other hand, is a larger phrase than these other categories; telemedicine and eHealth are subsets of telehealth

The Federation of State Medical Boards define Telemedicine as “the practice of medicine using electronic communication, information technology, or other means between a physician in one location, and a patient in another location, with or without an intervening health care provider.” The WHO defines eHealth as “the use of information and communication technologies (ICT) for health.”

Study detail



Study Title

What are the major available Telehealth platforms in APAC region in terms of features, positioning and pricing which could be a competitor to TEngage?



Study Objective

- A. To understand the required features on Telehealth platforms for customers need
- B. To find out different business models for these platforms
- C. To understand the need gap wherein TEngage could play a major role



Study Methodology

The method for this research is secondary desk research (SDR)



Introduction & setting up the context

Top companies

- ❖ InTouch Technologies Inc – 13% market share
- ❖ Allscripts Healthcare Solutions – 4.92% market share
- ❖ Resideo Technologies Inc
- ❖ AMD Global Telemedicine
- ❖ CISCO Systems

INDIA SPECIFIC:

- ❖ Practo Technologies Private Limited
- ❖ iCliniq
- ❖ Dhanush Healthcare
- ❖ Doxy.me
- ❖ AMC Health

Source:

<https://www.mordorintelligence.com/industry-reports/asia-pacific-telemedicine-market-industry>
<https://www.graphicalresearch.com/industry-insights/1480/apac-telemedicine-market>
<https://www.researchandmarkets.com/reports/5025858/asia-pacific-telemedicine-market-growth>
<https://www.marketsandmarkets.com/Market-Reports/telehealth-market-201868927.html>
<https://www.marketdataforecast.com/market-reports/apac-telemedicine-market>

List of Hospital

Intouch	Allscripts	CISCO	iCliniq	Dhanush
Myongji Hospital, South Korea	Singapore General Hospital (SGH)	Narayana Hrudayalaya (NH), India	M N P Nursing Home, India	All public healthcare institutions in India
	Flinders Medical Centre, South Australia,	Apollo Hospitals, India	Sri Ramakrishna Hospital, India	ASHA/ ANMs with ANMOL Solution
	Royal Adelaide Hospital, Australia		Bukhariya clinic – virtual clinic	eSub Centre/ Wellness Center Solution
	The Queen Elizabeth Hospital. Australia			eUPHC/ePHC Solution

InTouch Technologies Inc

- ❖ **B to B**, market share – 13%
- ❖ Part of Teladoc Health
- ❖ Started in 2002, headquarter in CA, United States
- ❖ Strong presence in South Korea, India
- ❖ GE Healthcare working with InTouch Health
- ❖ HITRUST CSF Certified

Product & Feature

Solo™ – Industry's first fully integrated, enterprise virtual care platform

Built on cloud-based network, Solo™ creates an integrated and scalable virtual care experience for any use case, care setting, and budget.

Give providers everything they need to offer world-class care anywhere, anytime by connecting people, healthcare systems, HIT systems, devices, and third-party software applications on a single platform.

Pricing

- Customized rates
 - Set-up costs start as low as \$10,000 per provider per year
-
- SaaS platform available on web, desktop, and mobile devices
 - End-to-end care coordination with configurable user workflows
 - EHR interoperability, User dashboard to manage all virtual care interactions
 - Patient-centric architecture
 - Digital patient intake with configurable journeys
 - Single sign-on with roles and user access controls
 - Administrative view for easy program and user management
 - Analytics portal and data sharing service
 - Solutions available for small practices to enterprise health systems
 - Updated user interface for seamless virtual visits and group conferencing
 - Both providers and patients can initiate consults

Allscripts Healthcare Solutions

- ❖ **B to B**, market share – 4.96%
- ❖ Partnered with Microsoft, Apple
- ❖ Strong presence in India , Australia, Singapore
- ❖ Technology partner - Microsoft
- ❖ CCHIT Certified product

Product & Feature

Sunrise EMR™ - comprehensive single-platform acute, ambulatory and revenue cycle solution for hospitals and health systems that provides a single patient record for more informed patient care

- Computerized Physician Order Entry
- note and flowsheet documentation
- clinical summary views
- tracks vital processes related to referrals, scheduling, current orders, medications, results and documents
- identifying and mitigating patient flow problems
- Real-time updates keep your entire clinical and operational team in the loop

Allscripts Opal - Allscripts Opal is a digital health record (DHR) to accelerate organizations' digital journeys, purpose-built with elegance, performance and flexibility to deliver better patient outcomes.

- Allscripts Opal is a proven system in more than 100 Australian hospitals.

Pricing

Customized rates

Allscripts is selling Sunrise, Paragon, Touchworks, Opal, Star, HealthQuart and Db Motion. All together, those businesses accounted for \$928 million in 2021

Allscripts Pro - Allscripts Professional EHR™ is the preeminent solution for physician practices that want to provide safer patient care, streamline operations and improve revenue aimed at medium to large healthcare organizations

HIPAA, ICD-10, CPT, HL7 compliance

- Clinical Workflow
- Lab Integration
- Medical Templates
- Patient Demographics
- Patient History
- Patient Portal
- Referrals
- Reporting and Analytics
- Scheduling
- Voice Recognition
- e-Prescription

AMD Global Telemedicine

❖ B to B

- ❖ Headquarter in Massachusetts, United States
- ❖ Presence in India, Australia, Singapore, Malaysia, China, Thailand
- ❖ HIPAA compliant, SOC 2 -Type II, ISO 27001/2, offers a Business Associate Agreement (BAA)

Product & Feature

AGNES Connect® - Clinical Encounter Telemedicine Platform, AMD's premiere software offering

The telehealth platform seamlessly aggregates data from connected clinical device diagnostics and then securely exchanges that information in real-time to the remote consulting physician

- cloud-based application – no need to configure back-end servers
- Multi-Provider Practice
- Video Conferencing
- Appointment Scheduling
- E-Prescribing
- AGNES Connect is built with support for the next generation of HL7, FHIR.

Pricing

Customized rates

- No free trial
- No free version
- one-time licensing fee per sending site
(flexible monthly subscription or 1x fee models available)

Connect N' Care® - a customizable telehealth app that allows healthcare providers to easily diagnose, treat and prescribe from the convenience of their mobile device or PC

The telehealth platform seamlessly aggregates data from connected clinical device diagnostics and then securely exchanges that information in real-time to the remote consulting physician

Upon receiving notification of a new patient case, the assigned clinician can log on using the Connect N' Care® app or web-based portal and review the SOAP notes, then proceed to do a quick video consult so they can view the patient

At the end of the consult, the telehealth encounter can then be documented in the EMR using API's, HL7 or FHIR protocols

CISCO Systems

❖ B to B

- ❖ Headquarter in CA, United States
- ❖ Presence in India, Indonesia, Japan, Australia Malaysia, Singapore
- ❖ Partnership with Samsung
- ❖ HIPAA/BAA compliance, FedRAMP Authorized, ISO/IEC 27001 certified

Product & Feature

Webex for Healthcare - Solutions for virtual healthcare and telehealth enable secure, patient-centered care

- HD video and audio
- Custom layouts
- Powerful meeting controls
- Easy content and screen sharing
- Recordings & transcriptions
- 1:1 and group messaging
- Calendar integrations
- Interactive polling and Q&A
- Animated virtual backgrounds

Pricing

	Starter	Business	Enterprise
Price	₹1049 license/month	₹2099 license/month	Need based
Number of hosts	1 to 50	1 to 100	Customizable
Meeting length	24 hours	24 hours	24 hours

- Noise removal
- Gesture recognition
- Automatic transcription
- Breakout sessions
- Digital whiteboarding in real-time
- Immersive share
- Picture in Picture for multitasking

Resideo Life Care Solutions

❖ B to B

- ❖ Headquarter in Texas, U.S.
- ❖ HIPAA compliance, BBB accredited

Pricing

Customized rates

Product & Feature

Clear Arch Health - a unique combined platform with Remote Patient Monitoring (RPM) and Personal Emergency Response System (PERS)

MobileVitals Touch: A tablet-based RPM system with engaging user features that keep the patient involved

- RPM Program Support
- Remote Patient Monitoring
- Virtual Video Visits
- Medication reminders
- Emergency Response
- Fall Button™/Activity tracking
- Messaging
- Educational resources

Vitals Peripherals: offers a full-featured suite of wireless connected peripherals for monitoring various chronic conditions including CHF, COPD, hypertension, diabetes and more

Practo Technologies

❖ B to B & B to C

- ❖ Headquartered in Bengaluru, founded May 2008
- ❖ Running in 15 countries
- ❖ HIPAA compliance, ISO 27001 certified
- ❖ BSI authorized

Product & Feature

Practo Ray - Practice management software for hospitals and clinic

- All details of patient scheduled for the day; complains, observations, diagnosis, lab test, medicine prescribed
- Refer to previous history of patient
- Automated appointment SMSs to patient
- Control & monetize post consultation
- Symantec & Amazon Web Service – used for secure data storage
- Easy to learn and use, vast library of help articles and training videos act as a quick reference for doctor and their staff

Pricing

Price	Rs 999/month	Rs 1499/month
Report	Basic	Advanced
Doctor Limit	Up to 50	Unlimited
Ray Payment	25 transactions /month @2%	Un transactions /month@1.8%
Promotional SMSs	100	1000
Support local language	-	13 languages

Practo Prime - Provides excellent visit experience

- Wait time – 15 minutes
- 24*7 instant booking
- Smart Calling system; gets auto connected if connection failed
- Free follow up; by chat, phone pr video call
- Assured meeting with choice of doctor
- Ray & Qikwell Lite – used for enhancing efficiency
- One time technology fee is charged to hospital & clinic, the first time a patient uses it to connect with them
- Practo representative reach out within 2 working days to guide through the setup process & future queries

❖ B to B

- ❖ Founded June 2012, located in Coimbatore, Tamil Nadu, India
- ❖ Presence in Singapore
- ❖ Revenue: 2.4 million USD
- ❖ HIPAA and GDPR compliant

Product & Feature

iCliniq Connect - global second opinion/online medical consultation platform for hospitals. It helps hospitals facilitate online consultation for their doctors and patients

- Dedicated Link - Your hospital will be provided with a link that will list all the doctors and modes of consultation they will be able to provide online.
- Convenient Communication Channels - The entire process of posting your case and receiving your report can be done seamlessly without traveling around in strenuous situations.
- No Annual Management Charges - The hospitals will only be charged with a doctor's monthly affiliation fee.
- 24/7 Tech Support - iCliniq Connect is easy to use, and we have around the clock tech support team to help you with your concerns.

Pricing

	Clinic	Hospital	Enterprise
Price	Free	INR1299+ Tax /mn Per Practitioner	Need based
Number of hosts	1 to 5	25 to 50	Above 50

- Health Tools - Our product is continuously innovated to make it simple and easy to use. All the health tools, such as the COVID-19 tracker, will be made available to your patients as well.
- Accessible via App - We have both iOS and Android apps for doctors. Doctors can answer queries, chat, and do phone or video consultations through the app.

Dhanush Healthcare

❖ B to B

- ❖ Founded in February 2020, Hyderabad India
- ❖ Presence in US, Europe, Australia, Middle East, Africa
- ❖ social care partners like UNICEF, Bill and Melinda Gates Foundation
- ❖ Works with Ministry of Health & Family Welfare, Govt of India, Govt of Andhra Pradesh, UN bodies and Govt of Kenya at the strategy level of National Health Policy definition
- ❖ HIPAA complaint

Pricing

Customized rates

Product & Feature

Dhanush EHR – manages History, Screening, Diagnosis, Prescription, Advice and Allergies electronically; Ability to integrate Diagnostic Lab Reports, Imaging reports and Images into single integrated medical record for patient

- Innovative: One can experience new levels of efficiency and productivity with our integrated feature.
- Affordable: Dhanush EHR system has no installation or hardware fees and also it is cloud-based, and requires no software installations, no in-house servers, and no in-house IT professionals to maintain hardware.
- Powerful: Our web-based EHR is a fully-featured, multi-use system designed to improve your efficiency and propel your practice forward.
- Flexible: The EHR system has been designed and built upon the newest Federated Electronic Health Record requirements and regulations
- Safe: Electronic Health Record is fully HIPAA complaint and complete with advanced security and encryption measures there by ensuring a safe and secure experience online.
- Interoperability: By using EHR, one can be assured that your practice can easily interface with other practices.

❖ B to B & B to C

- ❖ Headquarter in New York, US
- ❖ Presence in China, India, Japan, South Korea, Australia, and rest of APAC
- ❖ HIPAA, GDPR, PHIPA/PIPEDA, & HITECH compliant

Pricing

	Free	Professional	Clinic	Enterprise
Price	Free	\$35/per month Or \$29 annually	\$ 50/ provider/ month	Need based

Feature

Free

Telemedicine for everyone

- Unlimited video call minutes and sessions
- Waiting room
- Patient queue
- Text chat
- Meeting history
- Browser notifications
- Online help pages
- Email support
- Secure data center
- End-to-end encryption
- No patient data stored
- Breach insurance
- User community
- Website badges
- Marketing materials

Professional

For individual providers

All the benefits of Free, and:

- Text and email invites sent via doxy.me
- HD video
- Audio calls
- Room passcode
- Edit waiting room
- Text & email notifications
- Photo capture
- Group calling
- Screen share
- File transfer
- Payments
- On-demand chat support
- Scheduled phone or video support

Clinic

For 2-50 providers

All the benefits of Prof, and:

- Personalized subdomain
- Transfer patient
- Customized branding
- Room access control
- Admin controls
- Shared rooms
- Simultaneous calls
- Teleconsent form (add-on)
- Custom BAA (add-on)
- Custom security review (add-on)

Enterprise

For large organizations

All the benefits of Clinic, and:

- Onboarding team
- Dedicated Customer Success Manager
- Free support staff licenses
- Single sign-on
- Five customized teleconsent forms
- Monthly usage report
- Group discounts
- Security review

AMC Health

❖ B to B & B to C

- ❖ Headquarter in New York, U.S
- ❖ HIPAA complaint

Feature

AMC Health's Virtual Care, Telehealth and Remote Patient Monitoring (RPM) Solutions are designed to engage patients across the entire care continuum, deliver the best patient care, increase revenue, identify Social Determinants of Health, and provide better access to care.

- Cloud, SaaS, Web-Based
- Care Plan Management
- Caregiver Scheduling
- Client Management
- Compliance Management
- Dashboard
- Data Import/Export
- For Medical Purposes
- Patient Questionnaires
- Video Conferencing

Pricing

	Patient Onboarding/Device Setup	Device Monitoring with daily alerts	Patient Intervention (First 20 mins)	Patient Intervention (Add'l) 20 mins)
Price	\$19.19	\$63.16	\$50.94	\$42.22

- Patient Records Management
- Insurance Management
- Virtual Visits
- Mobile Access
- Mobile Payments
- Monitoring Device Integration
- One-to-One Messaging
- Patient Engagement
- Patient Portal
- Reminders



Need gap analysis

Comparative study of feature

	Intouch	AMD	CISCO	Resideo	iCliniq	AMC	TEngage
About Platform							
• White labelling	Yes						Yes
• Cloud platform	Yes	Yes					Yes
• Easy deployment	Yes						Yes
• Web/desktop/ mobile	Yes	Web based		Tablet based	Cloud/App	Cloud/Web	Yes
• EHR interoperability	Yes	Yes					Yes
• Multi-Lingual							No
• Multiple services	Yes						Yes
Compliant with							
• HIPAA	Yes	Yes	Yes	Yes	Yes	Yes	Upcoming
• GDPR					Yes		Upcoming
• ISO		Yes	Yes				Upcoming
• CPT							Upcoming
• HL7	Yes	Yes					Upcoming
Patient's dashboard							
• Updated info on the patient condition	Yes						Yes

	Intouch	AMD	CISCO	Resideo	iCliniq	AMC	TEngage
• Assigned virtual room	Yes						No
• Chief complaints							Yes
• Ongoing medication	Yes						Yes
• Insurance information						Yes	Yes
• History of visits	Yes				Yes	Yes	Yes
• Easy UI design	Yes						Yes
Doctors catalogue							
• Specialization & Experience	Yes				Yes		Yes
• Patient Queuing prioritized	Yes						No
• Appointments	Yes				Yes		Yes
• Care location	Yes						No
• Patient health record	Yes						Yes
• Patient referral							No
Online Consultation							
• Dedicated Link for teleconsultation	Yes		Yes		Yes		Yes
• Separate dashboards for doctor and patient	Yes						Yes

	Intouch	AMD	CISCO	Resideo	iCliniq	AMC	TEngage
• Room passcode							No
• Automated reminders	Yes				Yes	Yes	No
• Virtual waiting room	Yes						No
• Appointment Scheduling	Yes	Yes					Yes
• Edit waiting room							No
• Calendar integration			Yes				Yes
• Patient Engagement				Yes	Yes	Yes	Yes
• Patient waiting notification	Yes						No
• Audio calls			Yes				No
• HD video	Yes		Yes			Yes	Yes
• Group calling	Yes			Yes			Yes
• Virtual backgrounds			Yes				No
• Whiteboard			Yes				No
• Screen share			Yes				No
• Turn Off Participant							No
• Screen Image Capture							No
• Integrated Clinical Documentation	Yes						Yes
• Spotlight							No

	Intouch	AMD	CISCO	Resideo	iCliniq	AMC	TEngage
• Speech to text control							Yes
• Real Time Text/Chat	Yes		Yes		Yes	Yes	Upcoming
• Real time file transfer	Yes	Yes			Yes	Yes	Yes
• Real time vitals data transfer	Yes	Yes				Yes	Yes
• Imaging	Yes	Yes					No
• Notes	Yes						Yes
• E-Prescribing	Yes	Yes		Yes			Yes
• Assign lab tests					Yes		Yes
• Live support assistance					Yes		No
• Recordings & transcriptions			Yes				No
• Noise removal			Yes				No
• AI enabled Gesture recognition			Yes				No
• Automatic transcription			Yes				No
• Picture in Picture for multitasking			Yes				No
• Analytics portal	Yes		Yes				Yes
• Shows consultation timing							Yes
• Time extension, if needed							No
• Rejoining update							No

	Intouch	AMD	CISCO	Resideo	iCliniq	AMC	TEngage
Payment							
• Insurance Management						Yes	Upcoming
• Easy payment & verification					Yes	Yes	Upcoming
• Geolocation							No
• Previous payment record							No
• Post-Visit Patient Rating/Reviews/Survey							No

Geo-specific standards given by health/government authorities

INDIA

- ❖ National Medical Commission Act, 2019 ("NMC Act") by The Ministry of Health and Family Welfare (MOHFW)
- ❖ Telemedicine Practice Guidelines ("TPG") Issued under the MCI Code
- ❖ The Information Technology Act of 2000
- ❖ Information Technology (Reasonable security practices and procedures and sensitive personal data or information) Rules of 2011 (SPDI Rules)
- ❖ The Information Technology (Intermediaries Guidelines) Rules of 2011
- ❖ (The IT Act, SPDI Rules, and Intermediary Guidelines are all part of India's general data protection framework.)
- ❖ The Personal Data Protection Bill 2019
- ❖ The Central Drug Standards Control Organization (CDSCO) is the primary regulatory authority in India for medical devices and diagnostics.
- ❖ The Drugs and Cosmetics Act and Rules (DCA)

SINGAPORE

- ❖ The National Telemedicine Guidelines (January 2015)
- ❖ The Singapore Medical Council's ("SMC") Ethical Code and Ethical Guidelines (2016) ("ECEG")
- ❖ The Healthcare Services Act 2020 ("HCSA") recently coming into force on 3 January 2022
- ❖ The Health Products Act 2007 ("HPA"),
- ❖ SA's Regulatory Guideline for Telehealth Products (April 2019)
- ❖ The Personal Data Protection Act 2012 under the purview of the Ministry of Communications and Information ("MCI")
- ❖ The Cybersecurity Act 2018 (No. 9 of 2018)

TAIWAN

- ❖ The Personal Data Protection Act ("PDPA").
- ❖ The Communication Protection and Surveillance Act

Geo-specific standards given by health/government authorities

JAPAN

- ❖ The Ministry of Health, Labour and Welfare
- ❖ The Act on Securing Quality, Efficacy and Safety of Products Including Pharmaceuticals and Medical Devices
- ❖ The Act on the Protection of Personal Information
- ❖ Pharmacists Act (remote medicine prescription)
- ❖ Act on the Protection of Personal Information (Act No. 57 of May 30, 2003, as amended; the "APPI"), supervised by The Personal Information Protection Committee (the "PPC")

KOREA

- ❖ The Ministry of Health and Welfare
- ❖ The Ministry of Food and Drug Safety
- ❖ The Medical Service Act
- ❖ The Personal Information Protection Act
- ❖ The Fair Online Platform Intermediary Transactions Act (being promoted now)

AUSTRALIA

- ❖ The Privacy Act 1988
- ❖ My Health Records Act 2012
- ❖ Healthcare Identifiers Act 2010
- ❖ Health Records and Information Privacy Act 2002
- ❖ Health Records Act 2001

THAILAND

- ❖ The Personal Data Protection Act, B.E. 2562 (2019) ("PDPA")

CHINA

- ❖ The Cybersecurity Law of the People's Republic of China
- ❖ The Data Security Law, 10 June 2021

Geo-specific EMR/EHR applications

Key Market Players in APAC



India Specific

- ❖ Omni MD
- ❖ Allscripts
- ❖ MD Synergy
- ❖ Millennium
- ❖ Spigot
- ❖ DocEngage Informatics Pvt. Ltd
- ❖ Gem3s Technologies Pvt. Ltd
- ❖ Practo Technologies Pvt. Ltd
- ❖ CernerHealthcare Solutions Pvt. Ltd
- ❖ Philips India Limited
- ❖ Siemens Healthcare Pvt. Ltd
- ❖ Healthlink Technologies

Source:

<https://www.marketdataforecast.com/market-reports/apac-ehr-market> Feb 2022

<https://www.researchandmarkets.com/reports/5416141/asia-pacific-electronic-health-record-market>

<https://www.healthcareitnews.com/news/black-book-ranks-top-ehr-vendors-regions-across-globe>

<http://www.micromarketmonitor.com/market/asia-emr-ehr-6436566179.html>

<https://www.knowledge-sourcing.com/report/india-emr-electronic-medical-record-market>

Expectation by healthcare ecosystem stakeholders

"With telehealth, hospitals are now also concerned about reaching patients online, how to deliver and protect patient information. Telemedicine and remote patient monitoring are being increasingly adopted by service providers to virtually manage patients, predict and prevent illnesses, and improve clinical outcomes. There's been almost an 80 per cent rise in consumption of digital healthcare services after COVID-19. Digital technologies like extended reality, cloud systems, big data, and artificial intelligence are taking the center stage to enhance user- experience and increase process efficiency."

-Mr. Vikram Thaploo, CEO, Apollo Telehealth

"Digital mediums have emerged as promising avenues for information sharing, enhanced insights, interactions, awareness and solutions on healthcare. We are witnessing an increased level of adoption of telehealth opportunities supporting health information exchanges that further enable better engagement between HCPs and pharma companies"

-Sharad Tyagi, Managing Director, Boehringer Ingelheim India

"Digital technology is having a significant impact to the healthcare sector. This is also an opportunity to transform the doctor-patient relationship"

-Dr. Fazilah Shaikh Allaudin, Senior Deputy Director, Planning Division at the Ministry of Health of Malaysia

"We are seeing an unforeseen shift in the mindset of our pharma colleagues and customers. There is a push amongst everyone to move towards digital platforms. For all of us digital is no longer the future, it is the now. The best part is the customers are really receptive at present when they are reached online."

-Kulwinder Singh, Chief Communication Officer at Cadila Pharma

"With restricted access becoming the new normal, 70 per cent prescribers are willing to continue engaging with healthcare companies through digital mediums and 60 per cent prescribers are inclined to continue virtual interactions with salespersons "

-A report released in early June by Indian Pharmaceutical Alliance (IPA) and Boston Consulting Group (BCG),

"With telemedicine and app-based online pharmacies becoming more of a constant surrounding our daily lives spurring innovations in related devices and equipment, the coming year will also see more action in big data, AI and machine learning-based disease prediction technologies, apart from a push to more sophisticated surgical devices meant for a range of conditions such as neurological, cardio-vascular, oncological, orthopedic or musculoskeletal conditions."

-Mr. Ashok Patel, CEO and Founder, Max Ventilator

"Since the country has seen safety and necessity of telehealth services during the COVID-19 pandemic after the government provided conditional approvals on several telehealth services, we can no longer delay but permit introduction of telehealth services

-Lee Joo-wan, the vice president of Korea Venture Business Association, South Korea

Finding:

Telehealth is seen as the future of healthcare around the Asia Pacific region due to potential advancement in technologies, also Covid pandemic has created a demanding need for the virtual consultation. With overcoming challenges in the path, telehealth will emerge as essential branch of healthcare.

Survey on healthcare market expectations

India

- ❖ Royal Philips has published its latest Future Health Index 2021 report that explores how healthcare leaders are confronting the present challenges of the pandemic and where their current and future priorities lie.
- ❖ The report, which was in its sixth edition, surveyed almost 3,000 healthcare leaders across 14 countries from December 2020 to February 2021. From India, there were 200 participants.

Shift to remote care



75% of Indian respondents regarded the shift to remote or virtual care as a top priority

Challenges



Infrastructure limitations, such as slow internet and connectivity issues.

Major investment



94% of them said their health centers are most likely to invest in AI technologies soon; they are keen on harnessing AI to optimize operations, integrate diagnostics and predict patient outcomes.

Barrier in Telehealth adoption



65% difficulties with data management, and

55% the lack of interoperability across technological systems

Finding:

The findings from India revealed an imminent shift toward prioritizing remote care, adopting digital health technologies and implementing sustainable healthcare practices. Leaders unanimously believed that the country's policies and plans contribute to building a resilient healthcare system.

" We realize that not only is digital the future for healthcare in India, but Indian healthcare providers are rapidly adopting strategies to onboard digital technologies in their organizations,"

Rohit Sathe, VP for Health Systems at Philips India.



Source:

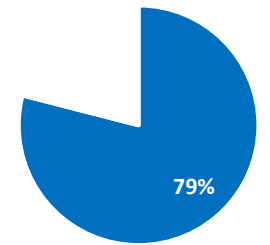
<https://www.healthcareitnews.com/news/asia/india-prioritising-shift-remote-care-survey>

Survey on healthcare market expectations

Australia

- ❖ B2B software comparison website Capterra has published the results of a study with over 1,000 Australians, detailing their perspectives and considerations about telehealth.
- ❖ Data was collected in April 2021 from Australians aged 18 and over, who had visited the doctor at least once a year, and had a healthcare appointment within the last 12 months.

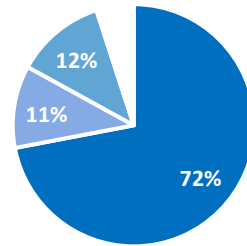
Accepted to use
Telemedicine again



■ Use again ■ Not use

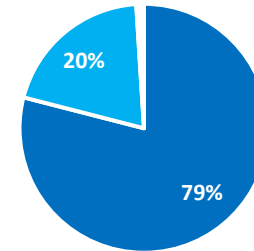
25% less risk of catching
contagions
15% remote access

Met consumer needs



■ Problem solved
■ Need repeated appointments
■ In person appointment
■ others

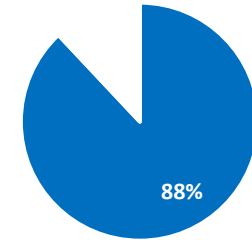
Consumer engagement
with Telemedicine



■ Dialling via phone call
■ Medical video conferencing app
■ other

81% mobile device is the most
used device
5% used computer for
teleconsultation

Pain points with
Telemedicine



■ In person consultation & physical
examination is better
■ others

21% will not use after pandemic
16% poor virtual consultation
sessions, owing to technical glitches
due to a poor internet connection, or
device incompatibility.

Source:

<https://www.healthcareitnews.com/news/anz/does-telehealth-australia-have-promising-post-pandemic-future>



Marketing strategies and sustainable growth

Product variants for Tengage

TEngage Basic

For basic needed features

- On-premises server-based platform
- EHR interoperability
- Calendar integration
- Appointment scheduling
- Patient visit history
- Doctors' detail
- Video call
- Group calling
- Integrated clinical documentation
- Real time file transfer
- Assigning lab test
- Analytics dashboard
- E-prescribing
- SMSs alerts/notifications
- Easy payment

TEngage Advance

Basic + advanced features

- Cloud based platform
- Infrastructure maintenance
- Speech to text
- Care location
- Multilingual
- Whiteboard
- Virtual waiting room
- Real time vital data transfer
- Screen share

TEngage Premium

Basic + advanced + premium features

- White-labelling
- Speech to text- medical grade
- Customized workflows
- Whiteboard + branding
- Advanced analytics dashboard
- Feedback collection from users
- Promotions & advertisement support

TEngage Super Premium

For extraordinary experience

- VR integrated platform
- AI enabled gesture recognition
- Customized advanced AI & ML features

Global Market Outreach

Target Audience

- ❖ Clinical Providers
- ❖ Management Administration
- ❖ Nurses and other staffs.

Places these audience can be targeted

- ❖ Social media such as Facebook, LinkedIn, YouTube.
- ❖ Digital Newsletter
- ❖ Medical magazines
- ❖ News, Guest blogs, op-eds

Activities

- ❖ Conferences with medical associations.
- ❖ Campaigns collaborated with hospitals.
- ❖ Campaigns collaborated with smaller clinics.
- ❖ Social media campaigns.
- ❖ Media activities
- ❖ Website.
- ❖ Demos with satisfaction surveys from providers and administration.

Leveraging TEngage in Healthcare Ecosystem



Home Care

Home health telehealth has become a more popular care model among home health agencies since the COVID-19 pandemic hit.

According to [Medicare.gov](https://www.medicare.gov), some of the most common skilled home healthcare telehealth services include:

- wound care for pressure sores or surgical wounds,
- intravenous or nutrition therapy injections,
- remote monitoring of illness and
- unstable biometric status,
- patient protocol education, as well as
- home health care education for clinicians in these specialties.

Example:

[Apollo Homecare](#): Home Visit Programs, Home Partnership Programs, Home Nursing Programs

[Foster Healthcare](#): Home Health Aid, Occupational therapy, Speech Therapy, Physical Therapy

[Aurora Healthcare](#): Helping Hearts at Home Package, Diuretic heart failure program, Rapid recovery program, Personalized Home care for chronic conditions



Clinical Research

Digital transformation helped to quickly embrace telemedicine enabling a streamlined trial process and the recruitment of diverse population for studies within the safe confines of trial participants' homes by bringing in modalities such as remote patient recruiting, remote consenting, video conference assessments, and at-home phlebotomy.

The most important factor for any modern technology to sustain is to make it simple, unified, patient-centric, and with an agile regulatory framework design incorporating critical elements such as privacy and cybersecurity into consideration.

Example:

[Doxy.me](#) – a telemedicine platform, connects doctors and researchers via video. Currently, 65,000 doctors use doxy.me with about a million telemedicine minutes a week and 8,000 to 9,000 video sessions a day.

The platform can also be used to remind patients to take their study medications at the proper time and let researchers know if participants are adhering to the study requirements

Leveraging TEngage in Healthcare Ecosystem

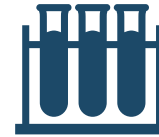


Elder Care

Elder Care is mostly needed when there is gradual decline of an elder's health with growing age, but it may also arise emergency cases. Getting old could be a difficult experience when your health starts to deteriorate, and you get increasingly dependent on others for your daily activities. It is at this time that the elderly require the most care and compassion.

Eldercare Includes –

- Doctor teleconsultation
- Nutrition teleconsultation
- Physiotherapy Video Consultation
- Remote health monitoring
- Home lab test service
- Emergency coordination



Home lab test

Collaboration with diagnostic centers to help them provide home medical tests and quick delivery of results through a web based user interface.

Options for bookings, patient profile, diagnosis and digital report might be kept in the interface.

[Practo](#) provides a similar service.

Some of the services available are

- Covid RT-PCR test
- Fasting Blood Sugar
- Beta HCG
- Vit b12 test
- HbA1c
- Liver Function test

Leveraging TEngage in Healthcare Ecosystem



Pharma Industry

Pharmaceutical industry has become an emerging industry worldwide. The global pharmaceuticals market produced treatments worth \$1,228.45 billion in 2020 and showed a compound annual growth rate (CAGR) of 1.8%. The Indian pharmaceutical market is expected to be worth 33.18 billion USD and will reach 9th position in the global pharma market by 2023.

Example:

- [Abbott India](#) is responsible for manufacturing a diverse range of nutritional products, diagnostic tools, branded generic pharmaceuticals, diabetes, vascular devices, and more.
- [Pfizer PAP Connect](#)- PAP Connect enables US patients and their healthcare providers to apply and manage their enrollment for select primary care medicines in the Pfizer Patient Assistance Program completely online through their mobile device or computer.



Wellness

Providing features like biometric screening, health assessments, wellness challenges, and more, Helping people embrace and sustain healthy habits for life. Built on a foundation of behavioral science, it can provide valuable insights on your employee health risk factors and create a healthier workforce.

- Digital Wellness Platform
- Wellness Contests & Challenges
- Wellness Coaching
- Biometric Screening
- Health Risk Assessment
- Smartphone Application

Example:

[HealthifyMe](#) is an Indian digital health and wellness platform that provides services such as calorie tracking, one-on-one nutrition and fitness coaching, and diet and workout plans. Developed for both Android and iOS platforms, the app takes a holistic lifestyle tracking approach to keep users engaged and motivated.

4 Ps of marketing for Tengage – APAC

Product variants ❖ Tengage Basic ❖ Tengage Advance ❖ Tengage Premium ❖ Tengage Super Premium	Place Places with high adoption to telehealth India: Andhra Pradesh, Tamil Nadu & Karnataka Singapore: Bedok, Jurong West and Tampines are major cities. Other two areas Woodlands and Hougang Australia: Sydney, Melbourne, Brisbane, Perth
Promotion • Conducting research with target • Pushing its unique features to the potential customers • A high-performance website SEO, social media and advertising • Promoting our product in national and international conferences • Purchase may not happen in 1 day, so it is essential to keep potential buyer updated by sharing related graphs and infographics to raise awareness.	Price • Subscription based pricing • Flexi Pricing

Target Population

- Primary Target – Medium Sized hospital (100 – 499 beds)
- Secondary Target - Large Hospital (500+ beds)
- Tertiary target – Small clinics.

Target Places

Urban location.

To overcome the technological adaptation barrier.

Sustainable growth

	Australia	Singapore	Malaysia	South Korea	India
❖ Revenue in the Digital Health market is projected to reach (2022)	- US\$1.80billion	US\$431.50million	US\$474.80million	US\$3.16billion	US\$9.15billion
❖ Revenue is expected to show an annual growth rate of	- (CAGR 2022-2026) of 6.30%	CAGR (2022-2026) of 9.25%	(CAGR 2022-2026) of 9.94%	(CAGR 2022-2026) of 6.56%	(CAGR 2022-2026) of 24.62%
❖ Projected market volume in 2026 would be	- US\$2.30billion	US\$614.60million	US\$693.60million	US\$4.08billion	US\$22.07billion

Benefits

- ❖ Provides better health care services to the community.
- ❖ Keeps patients at our facility, rather than transferring them out for specialized provider care.
- ❖ Retains revenues for providing care to the local community.
- ❖ Shows the community that its local hospital provides access to leading edge technology and services.
- ❖ Demonstrates effective hospital stewardship.

Barriers

- ❖ Lack of access to technology.
- ❖ Lack of digital literacy.
- ❖ Lack of access to broadband/internet.
- ❖ Preference for in-person visits.
- ❖ Lack of access to data access.
- ❖ Lack of awareness and understanding of telehealth offerings.
- ❖ Lack of awareness and understanding of insurance coverage for telehealth.
- ❖ Lack of health insurance.
- ❖ Lack of access to community-based resources.



Opportunity exploration

SWOT ANALYSIS



Strength (S)

- Product of a highly trusted Tata Group
- Provides white labelling solution for giving look and feel of the respective organization
- Provides speech to text feature, for proper capture of verbatims and decrease chances on missing out the important details
- Many upcoming features which would improve the usage of virtual consultation



Weakness (W)

- Many features are yet upcoming
- Provides similar features which is already existing
- Market already engaged by several companies providing similar features.



Opportunity (O)

- Due to pandemic, people are taking sincere precautions to avoid contagions, therefore remote consultation is booming
- Have opportunities to explore other peripherals such as Remote Health Monitoring, Elder Home Care, Home Lab Test, Preventive Medicine.
- Telehealth in India is in evolving phase; therefore, it is good to experiment with needed features.
- In India, Overall high digital literacy of the population.
- In Australia , Due to pandemic, people are taking sincere precautions to avoid contagions, therefore remote consultation is booming.



Threat (T)

- Post pandemic virtual consultation is seen decreasing
- Poor virtual consultation sessions, owing to technical glitches due device incompatibility is seen as threat for teleconsultation
- Patient hesitation and less trust in online consultations
- Lack of health insurance.
- In Singapore , Patient hesitation and less trust in online consultations.
- In India , Lack of strong government guidelines and regulation pertaining to telehealth.
- In Europe , Legal loopholes regarding liability and data confidentiality and security



The penetration pricing method was chosen

Penetration pricing is a pricing strategy where the price of the product is initially kept lower than the competitors' products to gain most of the market share and to trigger word of mouth marketing. We have compared the product and the features of the competitors and produced this price proposal, based on the competitor's pricing.

Pricing menu for Tengage - APAC

Reference from market study

InTouch Technologies Inc: Set-up costs start as low as \$10,000 per provider per year

iCliniq	Clinic	Hospital	Enterprise
Price	Free	INR1299+ Tax /month Per Practitioner	Need based
Number of hosts	1 to 5	25 to 50	Above 50

Cisco	Starter	Business	Enterprise
Price	₹1049 license/month	₹2099 license/month	Need based
Number of hosts	1 to 50	1 to 100	Customizable
Meeting length	24 hours	24 hours	24 hours

AMC Health	Patient Onboarding/Device Setup	Device Monitoring with daily alerts	Patient Intervention (First 20 mins)	Patient Intervention (Add'l) 20 mins)
Price	\$19.19	\$63.16	\$50.94	\$42.22

Practo	Rs 999/month	Rs 1499/month
Report	Basic	Advanced
Doctor Limit	Up to 50	Unlimited
Ray Payment	25 transactions /month @2%	Un transactions /month@1.8%
Promotional SMSs	100	1000
Support local language	-	13 languages

Doxy.me	Professional	Clinic	Enterprise
Price	\$35/per month Or \$29 annually	\$ 50/ provider/ month	Need based

Pricing menu for Tengage - APAC



A. Subscription based Pricing

One time set up price:

\$2500 - \$3000

White labelling

For look & feel of your organization

Price: \$3500 - \$5500 (one time)

TEngage Basic

\$35 - \$ 40/per provider/month

\$25-\$30/ * 12/per provider annually

TEngage Advance

\$20 - \$25/provider/month

\$15 - \$20/ * 12 provider annually

TEngage Premium

\$20 - \$25/provider/month

\$15 - \$20/ * 12 provider annually

Reverse calculations of the annual total amount of the reference prices was done and were redistributed to the number of patients based on the size of the hospitals

Pricing menu for Tengage - APAC



B. Flexi Pricing

One time set up price:

\$2500 - \$3000

White labelling

For look & feel of your organization

Price: \$3500 - \$5500 (one time)

1 to 20 user

Basic: \$1100 - \$1500 + \$20 - \$25 /user/month + \$2/patient

Advance: \$30 - \$35/user/month + \$5/patient

Premium: \$40 - \$45 /user/month + \$10/patient

21 to 40 user

Basic: \$2000 - \$2500 + \$20 - \$25 /user/month + \$2/patient

Advance: \$30 - \$35/user/month + \$5/patient

Premium: \$40 - \$45 /user/month + \$10/patient

Above 40 user

Basic: \$3000 - \$3500 + \$20 - \$25 /user/month + \$2/patient

Advance: \$30 - \$35/user/month + \$5/patient

Premium: \$40 - \$45 /user/month + \$10/patient

Reverse calculations of the annual total amount of the reference prices was done and were redistributed to the number of patients based on the size of the hospitals

Pricing menu for TEngage

India



A. Subscription based Pricing

One time set up price:
Rs79999 – Rs199999

White labelling

For look & feel of your organization
Price: Rs 99999 – Rs 299999 (one time)

TEngage Basic

Rs 999- Rs1199/per provider/month
Rs 899 - Rs 1099/ * 12 / per provider annually

TEngage Advance

Rs1299 - Rs1399/ per provider/month
Rs 1099 - Rs 1299/ * 12 / per provider annually

TEngage Premium

Rs1499 – Rs1599 /per provider/month
Rs 1299 - Rs 1499/ * 12 /per provider annually

Reverse calculations of the annual total amount of the reference prices was done and were redistributed to the number of patients based on the size of the hospitals

Pricing menu for TEngage

India



B. Flexi Pricing

One time set up price:

Rs79999 – Rs199999

White labelling

For look & feel of your organization

Price: Rs 99999 – Rs 299999 (one time)

1 to 20 user

Basic: Rs39999 – Rs59999 + Rs 150/user/month + Rs 30/patient

Advance: Rs 200/user/month + Rs 40/patient

Premium: Rs 250/user/month + Rs 50/patient

21 to 40 user

Basic: Rs49999 – Rs69999 + Rs 150/user/month + Rs 30/patient

Advance: Rs 200/user/month + Rs 40/patient

Premium: Rs 250/user/month + Rs 50/patient

Above 40 user

Basic: Rs79999 – Rs89999 + Rs 150/user/month + Rs 30/patient

Advance: Rs 200/user/month + Rs 40/patient

Premium: Rs 250/user/month + Rs 50/patient

Reverse calculations of the annual total amount of the reference prices was done and were redistributed to the number of patients based on the size of the hospitals

Collaboration opportunities - APAC



- ❖ **Collaboration with central and state government:** Leveraging the healthcare by providing teleconsultation facilities in District hospitals, CHCs, PHCs, government clinics, maternity centers, rehabilitation hospitals, government digital health programs
- ❖ **Fitness & Wellness center:** to keep their customers informed and updated, solve queries
- ❖ **Pharma companies:** to directly connect with their customers for research and feedback
- ❖ **Medical device manufacturer:** for seamless integration of telehealth platform with the organization system
- ❖ **Company:** employer of the company can help the employees in their organization by utilizing this platform for their regular health checkup, or in case of some illness.
- ❖ **Sports:** sportsman can consult their doctors/nutritionist for their health and fitness, about their diet plan and exercise routine
- ❖ **Multiple clinics:** for easy access of patient's data and history to give definitive care and treatment

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Thank you !