DIGITAL HEALTH AND INNOVATION CLUSTER BULGARIA

[Digital HC Update – the role of AmCham]

Mira Ganova /CEO DHI Cluster Bulgaria/
Pavel Panayotov /Merck Bulgaria/

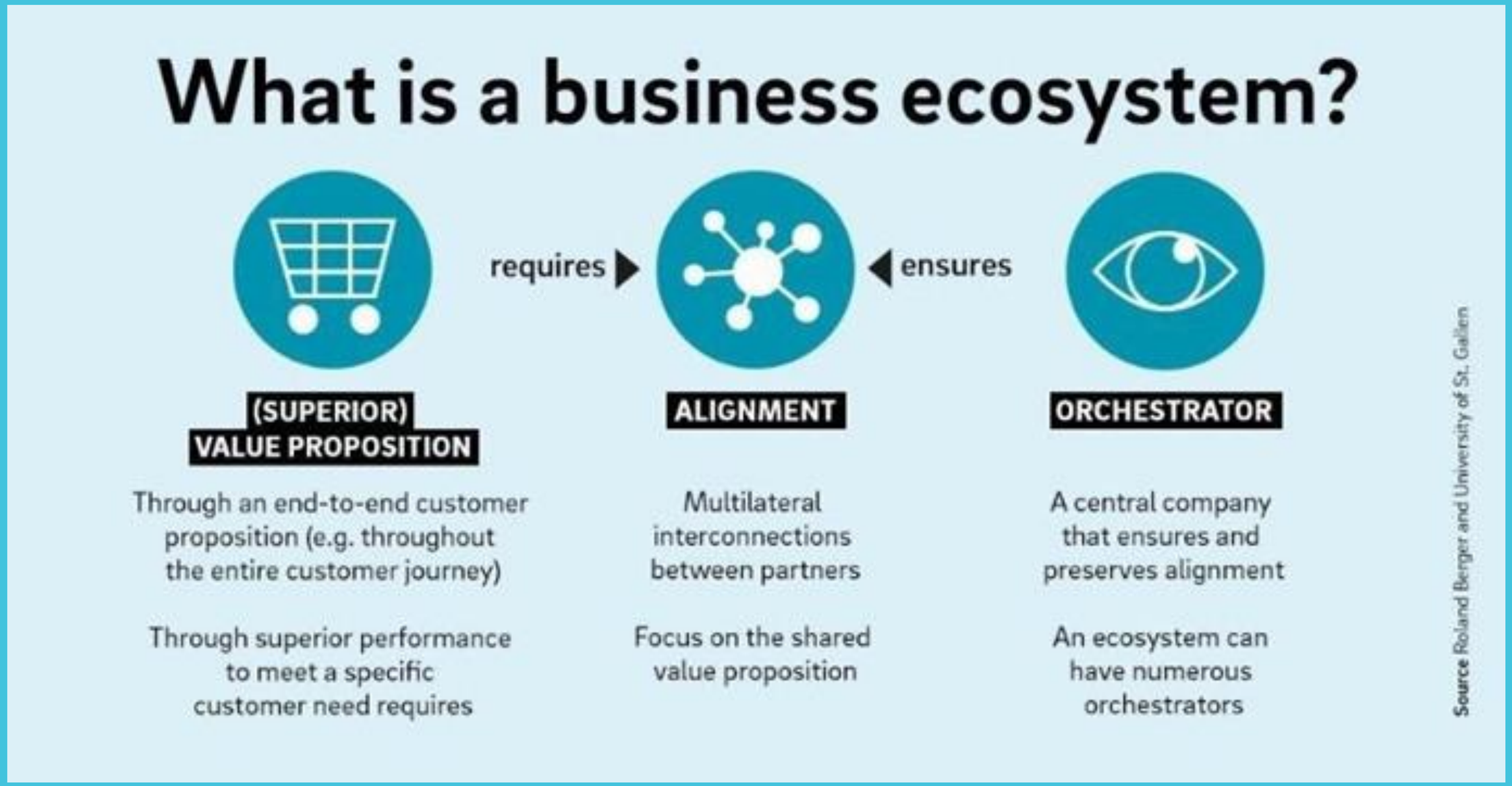
ROBERTO VIOLA
DIRECTOR GENERAL
DG CONNECT

“We are really trying to set a new environment. The new goal for Europe is a data-driven healthcare system. This is a completely different vision from what we were talking about in the past.“

“...data-driven healthcare should not be some state-controlled enterprise, but rather an ecosystem that is open for private entrepreneurs who provide the tools that create value out the vast technological and data resources.”

https://echalliance.com/news/412153/Data-Driven-Healthcare-Europe-To-Change-Gear.htm

WHY IS IT IMPORTANT?



DHI Cluster

DIGITAL HEALTH AND INNOVATION CLUSTER BULGARIA

VISION

Create a data-driven healthcare to boost sustainability and efficiency in the system

MISION

Develop an ecosystem in healthcare that is open for private entrepreneurs and organizations able to provide the tools that create value impact out the vast technological and data resources

DHI Cluster

DIGITAL HEALTH & INNOVATION (DHI) CLUSTER BULGARIA

DHI CLUSTER MEMBERS

SAT HEALTH system analysis and technology
FindMeCure
SOFTGROUP
Национална пациентска организация National Patients' Organisation
BAYER
beye expand your thinking
CHECKPOINT CARDIO
ontotext
MSD INVENTING FOR LIFE
abbvie
AMGEN
sqilline brilliant beyond borders
JA Bulgaria A Member of JA Worldwide
MERCK
MNEMONICA Mastering Security Delivering Protection
PLAY REHA
Consento
NOVARTIS
MYSYNERGY
imagga
Roche
ServiceCentrix
Healee
superdoc.bg
PTUSO
MURGOVA & PARTNERS ATTORNEYS AT LAW

DHI CLUSTER PARTNERS

Български фармацевтичен съюз

DHI Cluster

Services

Access

Access to up-to-date and timely information. Business consulting.

Support

Support and development of digital health solutions and innovation.

Cooperation

Providing a platform for communication and collaboration.

Mentorship

Guidance in healthcare and educational systems.

US Companies and partners
DHI Cluster Bulgaria

MSD
INVENTING FOR LIFE

abbvie

ORACLE®

vmware®

Microsoft

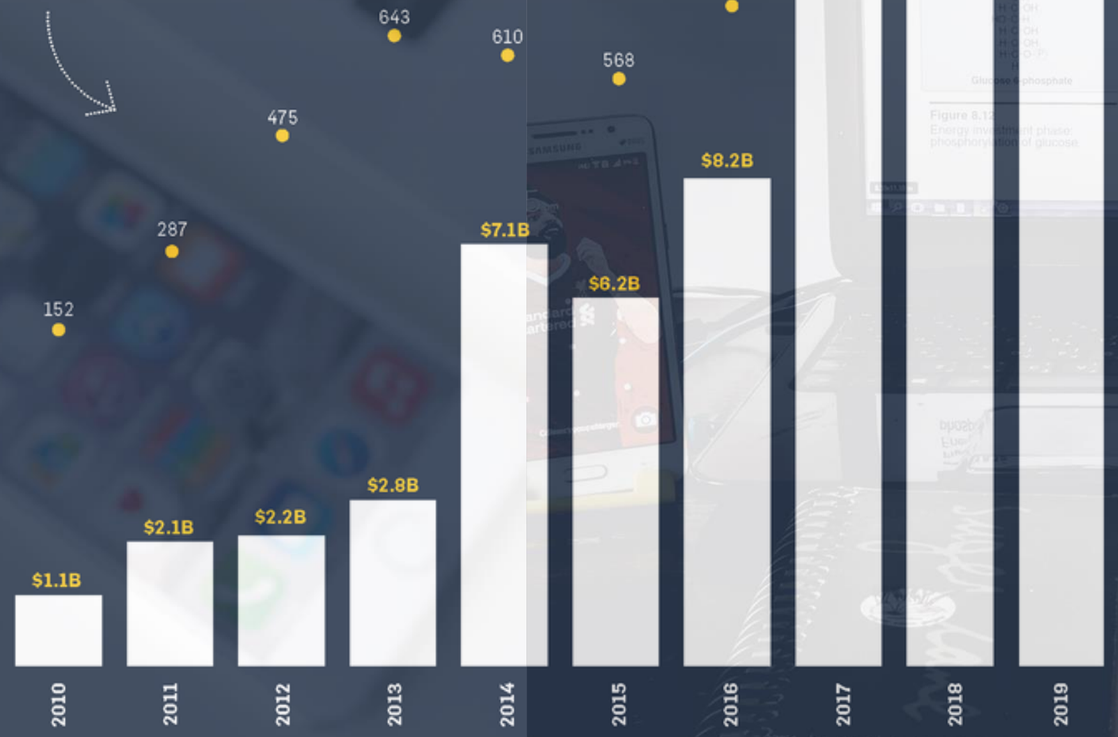
BUSINESS AND TECHNOLOGY
INNOVATIONS

USA, Washington, Embassy
of the Republic of Bulgaria

$70B Raised in Health Innovation Since 2010

Health innovation funding continued its strong upward trend, a curve we've been tracking for almost a decade. While you can parse each rise and dip in our quarterly insights report, these year-over-year numbers tell a simple yet compelling story – health innovation is robust and growing. In a mere decade, 4,300 startups got funded, and funding levels increased by a factor of 10, with similar growth in the number of investors. And from our vantage point, we're just getting started.

Health Innovation Funding, Year Over Year



Source: StartUp Health Insights | startuphealth.com/insights. Note: Report based on publicly available data through 12/31/19 on seed (incl. accelerator), venture, corporate venture, and private equity funding only. Companies tracked in StartUp Health Insights may fall under multiple moonshots and therefore will be represented throughout the report.

INVESTMENTS IN DIGITAL HEALTH USA

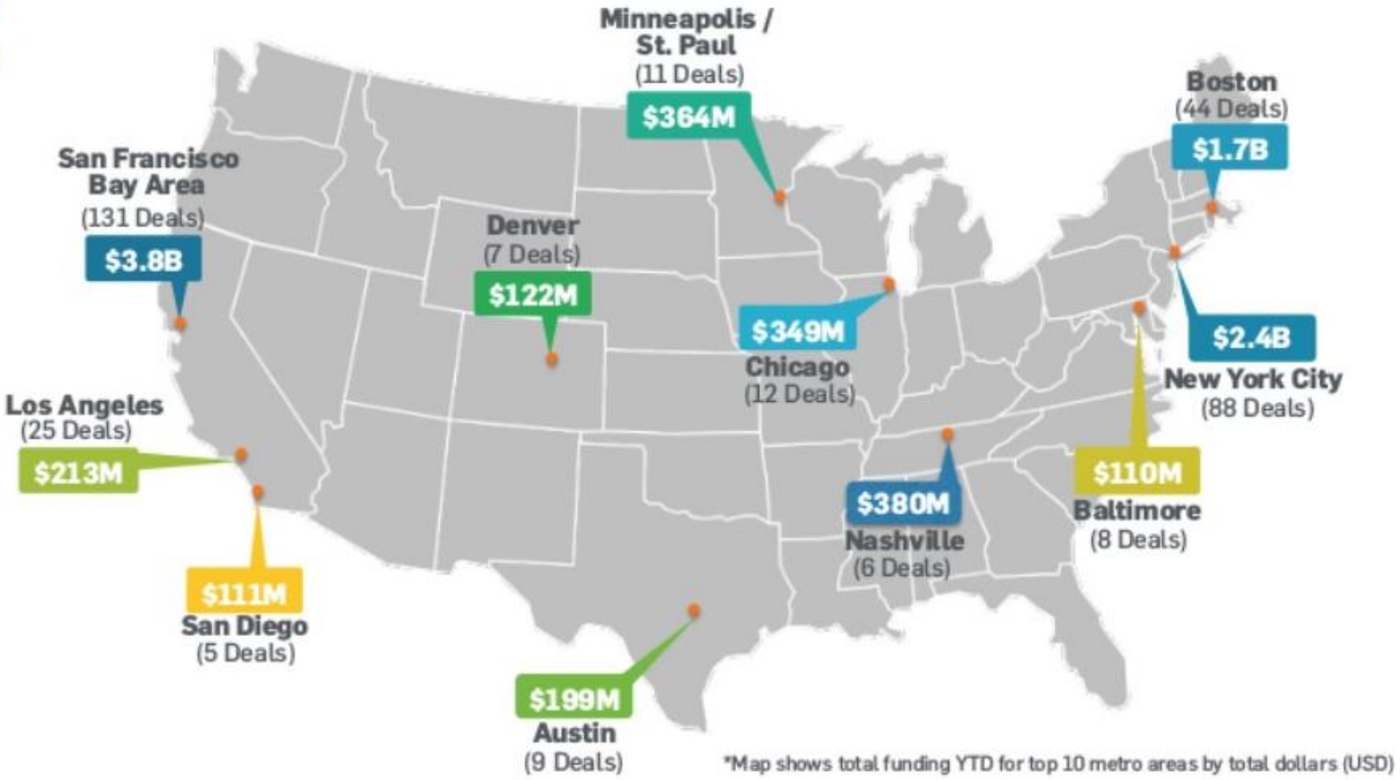
DEALS & FUNDING | INVESTORS | SEGMENT DETAIL

STARTUP +HEALTH

THE MOST ACTIVE U.S. METRO AREAS OF 2018

Nashville made its debut on this map, raising the most funding in 2018 behind the usual suspects: NYC, San Francisco, and Boston. The metro areas below account for nearly 70% of total digital health funding for 2018.

	Region	Total 2018 Deal Count	Total 2017 Deal Count
1	SF Bay Area	131	126
2	New York City	88	63
3	Boston	44	29
4	Los Angeles	25	21
5	Chicago	12	20
6	Minneapolis	11	11
6	Seattle	11	14
7	Austin	9	11
8	Baltimore	8	10
8	Miami	8	6
9	Denver	7	11
9	Philadelphia	7	12



*Map shows total funding YTD for top 10 metro areas by total dollars (USD)

INVESTMENTS IN DIGITAL HEALTH EUROPE&OTHERS

DEALS & FUNDING | INVESTORS | SEGMENT DETAIL

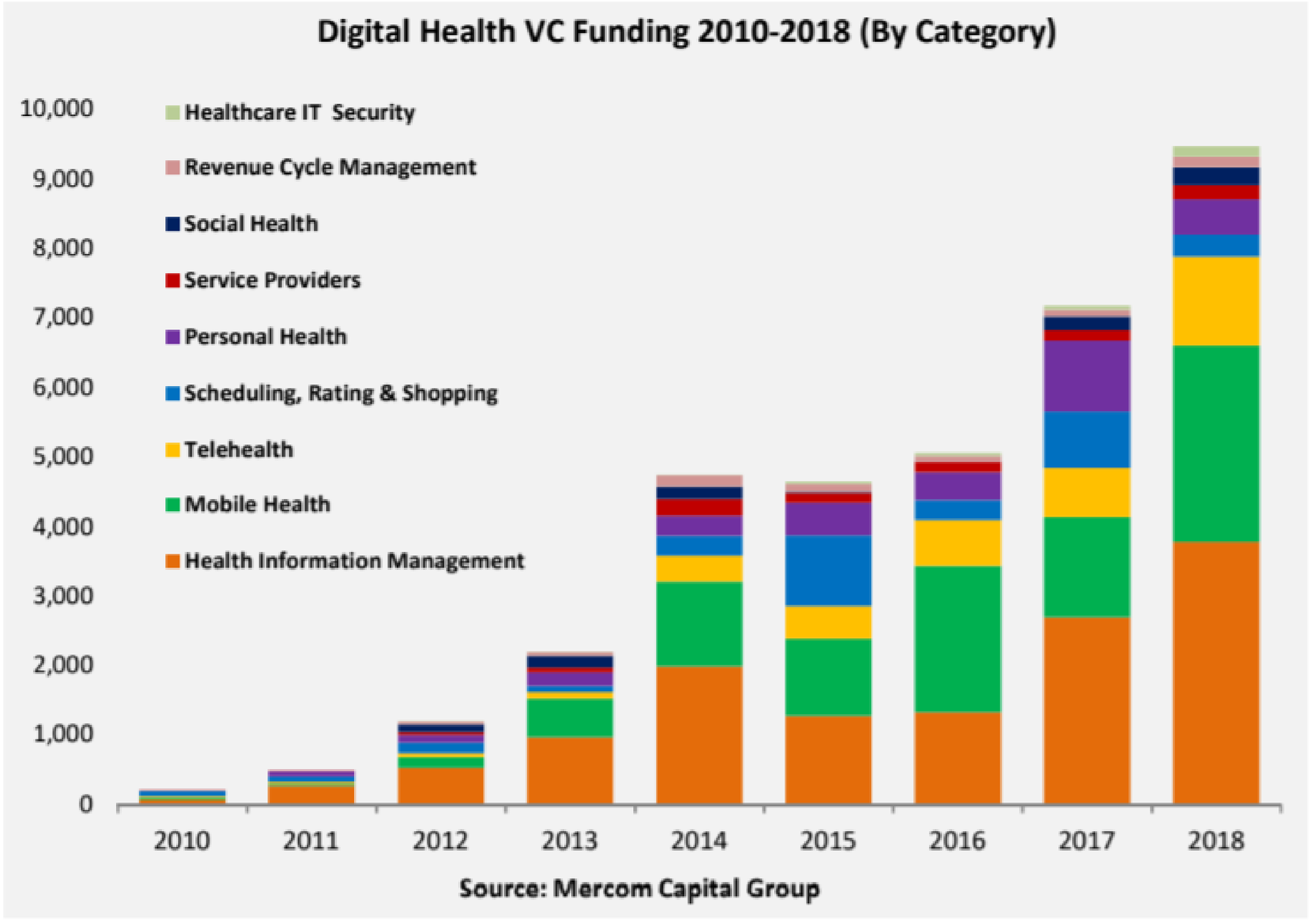
STARTUP +HEALTH

INTERNATIONAL METRO HUBS OF 2018

Beijing and London closed the same number of deals in 2018, but larger deals in Beijing brought their year total close to nearly five times that of London's. Bengaluru, where India's IT industry began 25 years ago, is proving to be a major hub for digital health in Asia, closing the second largest number of deals in 2018.

	Region	Total 2018 Deal Count	Total 2017 Deal Count
1	London	21	22
1	Beijing	21	15
2	Bengaluru	15	17
2	Stockholm	15	15
3	Singapore	14	8
4	Toronto	13	15
5	New Delhi	12	9
6	Tel Aviv	10	17
7	Vancouver	9	2
8	Berlin	8	9

* Map shows top 10 metro areas by total dollars (USD)


Digital Health VC Funding 2010-2018 (By Category)
10,000
9,000
8,000
7,000
6,000
5,000
4,000
3,000
2,000
1,000
0
Healthcare IT Security
Revenue Cycle Management
Social Health
Service Providers
Personal Health
Scheduling, Rating & Shopping
Telehealth
Mobile Health
Health Information Management
2010
2011
2012
2013
2014
2015
2016
2017
2018
Source: Mercom Capital Group

Digital healthcare update

National Health Information System

- Ministry of health terminated public procurement procedures in May 2020
- information Services, the state IT company, will develop the system and will have the responsibility for the overall management and the selection of subcontractors
- The Ministry of Health - NHIS will be ready by November 2020
- **The problem**: No transparency, total lack of information; underestimating the role of key stakeholders, huge risk for the sustainability of the future system

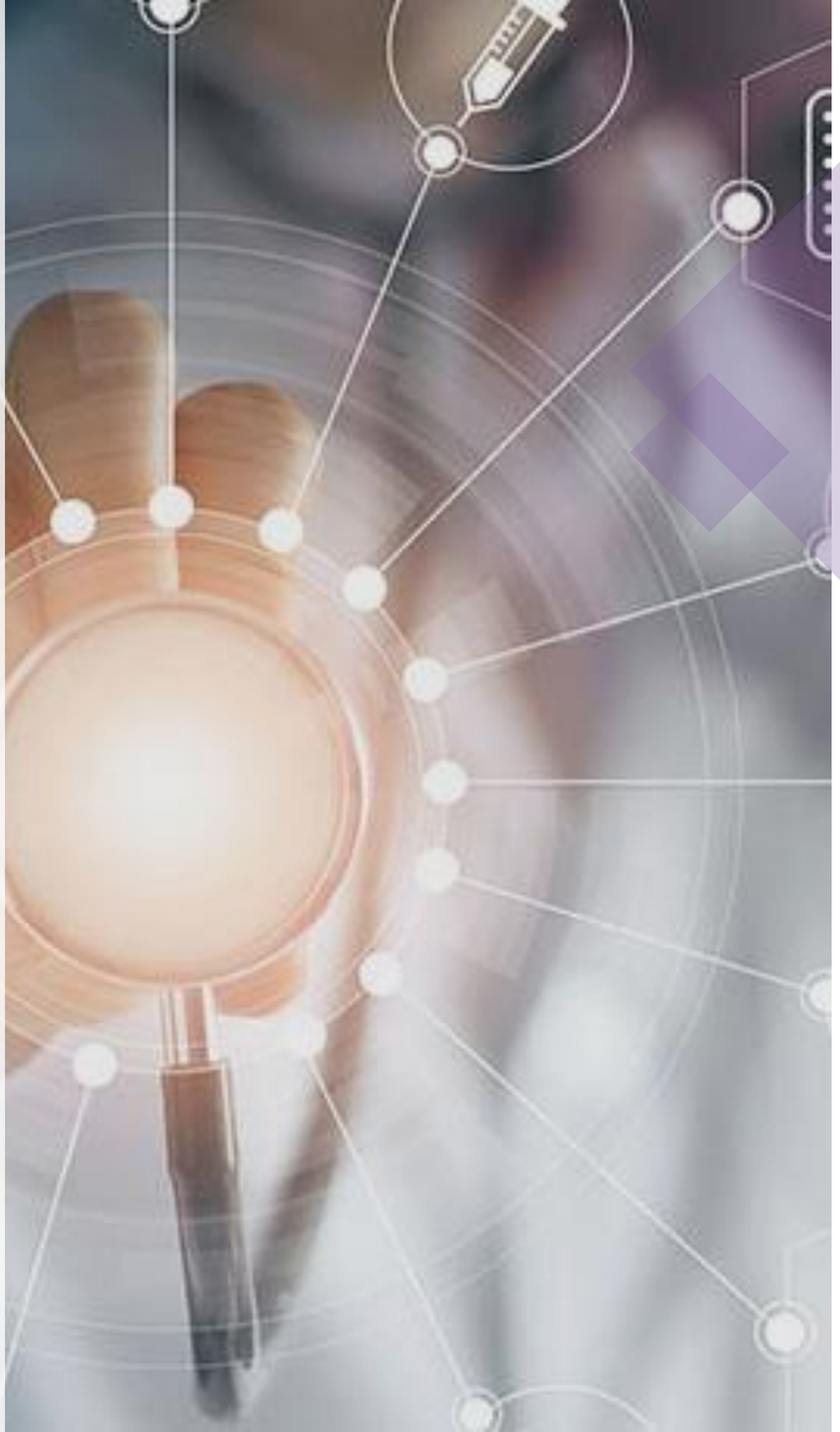
Further steps of the key stakeholders:

- **Expert council of the key stakeholder created** (BMA, BPhU, ArPharm, BGPharma, DHI Cluster)
- **Minimum viable system technical specification prepared** – the MVS it will be proof of concept or a pilot project. The purpose of this system is to provide basic functionality for electronic protocols /prescriptions, making it convenient and accessible for both doctors and pharmacies and RHIF / NHIF, ensuring a smooth process of approval, prescription and dispensing of medicinal products.

THE ROLE OF AMCHAM

How to bring the dialogue between Bulgaria and AmCham in the field of healthcare from long-term strategic level to active operational support?

- **US Ambassador, Hero Mustafa, 11.02.2020: “US is ready to support the implementation of the e-health by all means“**
- **Healthcare in the scope of 2020-2021 AmCham priority “Sustainable business environment and investments**”
- **Ongoing partnership of the DHI Cluster with US companies**
- **AmCham shall activate its digital healthcare agenda** and from strategic partner, shall become an active collaborator with the Ministry of Health and the other key stakeholders in the sector for sustainable and efficient digital healthcare in Bulgaria
- **AmCham support regarding the NHIS by:**
  - Consistently and publicly emphasize the importance of e-heath and advocate for its quick implementation
  - Support the development of NHIS trough the high expertise of its members
  - Support the Expert counsel and recognize its importance for implementing sustainable e-healthcare in the Bulgaria
  - Digital healthcare event in partnership between AmCham and the digital Cluster
  - Others?



DISCUSSION

- AmCham digital healthcare agenda
- DHI & AmCham annual e-health event
- NHIS

DHI Cluster

THANK YOU FOR YOUR ATTENTION!

DHI Cluster

DIGITAL HEALTH AND INNOVATION

CLUSTER BULGARIA

www.dhicluster.bg

office @dhicluster.bg

Digital Health and Innovation Cluster Bulgaria