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COOP4 
HEALTHCARE

>>Challenges and chances of telemedicine in Austria from the perspective of a startup

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enlivo



**First platform to enable fast & lasting
physiotherapeutic treatment**

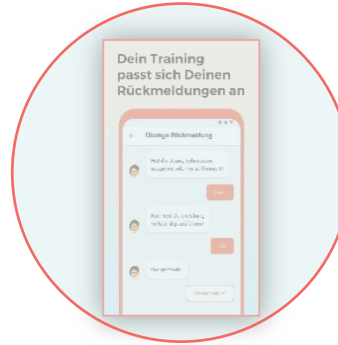
3 DETACHED TREATMENT MODELS IN PHYSIOTHERAPY TODAY

98% of physiotherapeutic treatment today¹



Traditional treatment

- 10 treatments à 80 EUR within 3-6 months
- No or paper-based at-home training²
- No compliance data



Digital Therapeutics (DTx)

- No personal relationship/support
- DTx for one specific indication only (no multimorbid treatment)³



Teletherapy

- Only substitution of personal therapy (comparable cost-benefit ratio)

Sources: 1) Statista.de on the basis of doctor's survey (estimation),

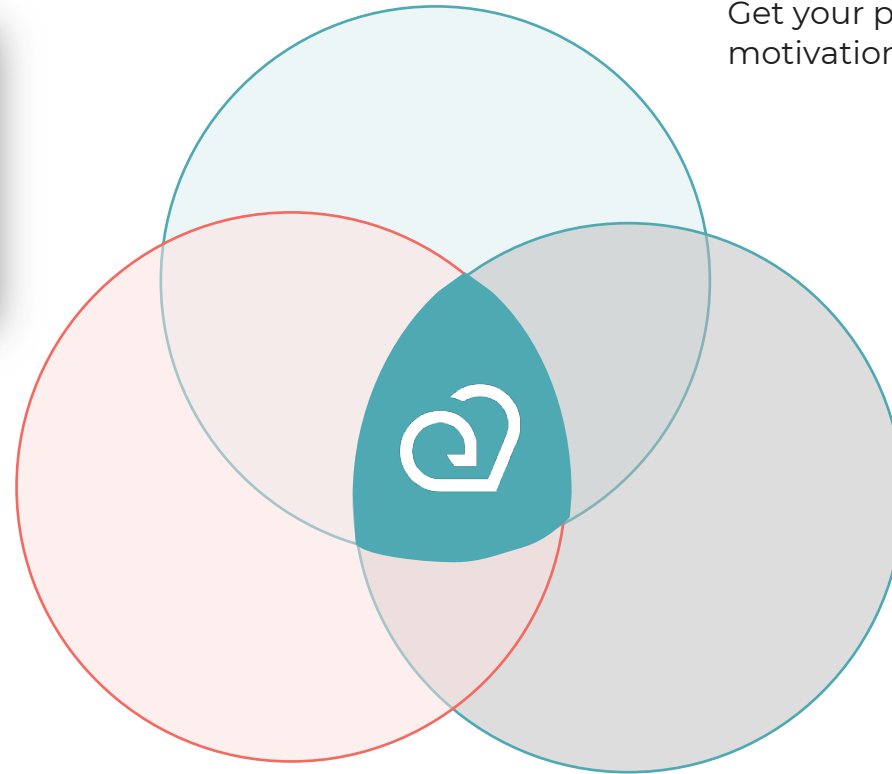
2) Out of 150 PT's we talked to, <5% are using digital tools to support at-home training only, 3) Dang, A., Arora, D., & Rane, P. (2020).

WE COMBINE THESE IN A BLENDED CARE SETTING



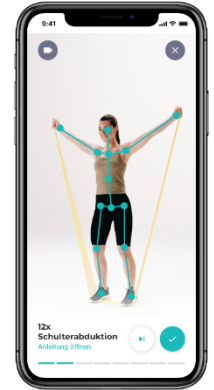
Personal therapy

Be guided by a professional to receive a real **personalized** and **optimized therapy**¹



Digital Therapy at home

Get your personalized daily exercises, and motivation 24/7



Teletherapy

Leverage teletherapy for regular, but short check-ins to update plans



Sources: 1) Guggenberger B., & Maul L. , (2020)

PRODUCT

A patient-centric mHealth application for physiotherapeutic treatment at home



Booking and in-app teletherapy

Booking and digital teletherapy check-ins so patients can meet with their therapists from home



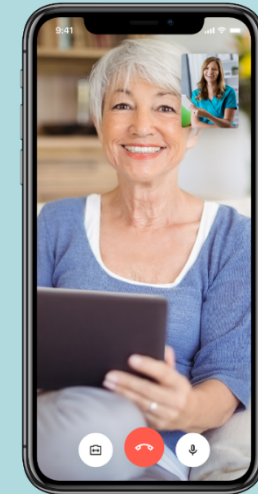
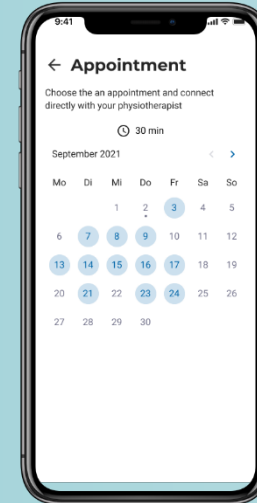
Personalized rehabilitation plan

Professional content (400+ videos) and AI-assisted mirror mode to increase exercise adherence

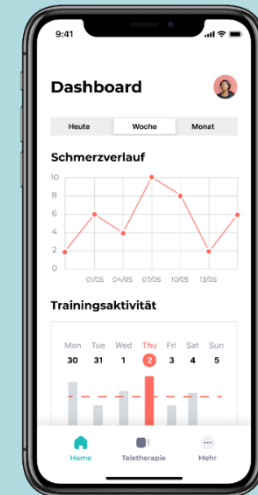
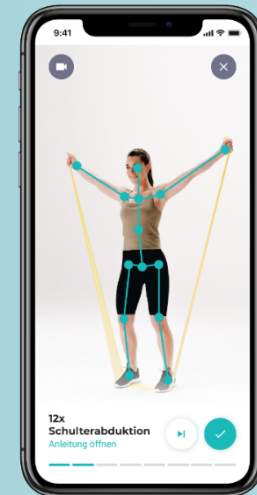


Tracking of important parameters

Total rehabilitation progress at a glance, visible for both patients and therapists



Product Demo¹



¹ <https://www.loom.com/share/4dfc8ea62a6941c2a62b2027753298c4>

CHANCES AND BENEFITS

Telemedicine has the potential to create WINS for all Stakeholders in the health system



Patients

„want high quality of life at low cost“



- Receive personalized treatment at lower cost
- Long-term and lasting results and a better quality of life¹
- No travel, time-saving



Therapist / Clinic

„more passive earnings and best treatment offer“



- New income source via long-term treatment
- Better treatment of patient while saving time for administrative tasks



Insurances

„want innovation, healthy clients and low cost“



- Positioning as innovative player
- Costs savings due to better adherence and decreased interventions

¹) <https://www.ascenti.co.uk/news-article/virtual-physiotherapy-report>

CHALLENGES OF TELEMEDICINE IN AUSTRIA

From the perspective of a Startup

LEGAL



MEDICAL PRODUCT



DSGVO/GDPR



General legal
Framework (e.g. MTD-
G)

COMMERCIAL



WILLINGNESS TO PAY



REIMBURSEMENT

USERS



PUBLIC PERCEPTION



EDUCATION



CHANGE
MANAGEMENT

MEDICAL DEVICE

1. IS THE PRODUCT A MEDICAL DEVICE?

- 1 „medical device’ means any instrument, apparatus, appliance, software, material or other article, whether used alone or in combination, including the software intended by its manufacturer to be used specifically for diagnostic and/or therapeutic purposes and necessary for its proper application, intended by the manufacturer to be used for human beings for the purpose of:
 - 2 – diagnosis, prevention, monitoring, treatment or alleviation of disease,
 - 3 – diagnosis, monitoring, treatment, alleviation of or compensation for an injury or handicap,
 - 4 – investigation, replacement or modification of the anatomy or of a physiological process,
 - 5 – control of conception,
- and which does not achieve its principal intended action in or on the human body by pharmacological, immunological or metabolic means, but which may be assisted in its function by such means;



MEDICAL DEVICE

**2. DECLARATION OF
CONFORMITY**

- Clinical evaluation
- Risk management
- Engineering Processes
- Usability Engineering
- Quality Management

DATA PROTECTION



- Very important, if not the most important criteria for therapists
- News about Zoom have further increased awareness
- Many don't really know what needs to be done → Education (!)
→ A certificate alone is not sufficient
- No official certification in Austria
- More (continued) education in this domain is very crucial for the success of telemedicine and digital tools

OTHER CHALLENGES

COVID AS CHANGE-DRIVER



- No option to get reimbursement
- No special legal framework on telemedicine in Austria
- Legal gaps (e.g. MTD-G) whether telemedicine is permitted
 - Not explicitly permitted but not forbidden either...



- MTD-G:
 - „solange und soweit nach dem Stand der medizinischen Wissenschaft und nach dem Stand der Technik das Wohl der Patientin / des Patienten gewahrt wird“
 - „as long as based on research and state of the art technology, the wellbeing of patients is maintained.“***
- Major public insurances offered to reimburse telemedicine during COVID

COMMERCIAL CHALLENGES

Someone needs to pay for it...



PATIENT

Willingness to pay
out-of-the-pocket in
Austria very limited



THERAPIST

What's in for them?



INSURANCE

Reimbursement of therapist
limited during COVID

Will only pay for tools/apps if
proof is there that value
(=benefit/cost) of the approach
is better

Finding a valid business model is very challenging!

CHANGE MANAGEMENT & EDUCATION

Fears

„they are only trying to replace us“
„this will not work for my patients“

Education Gap

How/when can I use Teletherapy?
What patients are eligible?
What equipment is needed



MEDICAL PRODUCT

- Intended Use
- Usage Description

CONCLUSION

01 Big potential

02 Low Digitalization
before COVID

03 COVID as Driver
for Change

04 Education & Change
Management



Telemedicine bears great potential for patients but as well therapists and the health system

Before COVID, application was very limited if not possible in therapy – low degree of digitalization in general

COVID helped to accelerate that change, which is more progressed in other markets (AUS, UK, US, ...)

Education in Telemedicine (Tools, GDPR, Medical Products...) is very important

