

# The ICT Industrial Vision & e-Healthcare Service

2003. 10. 21



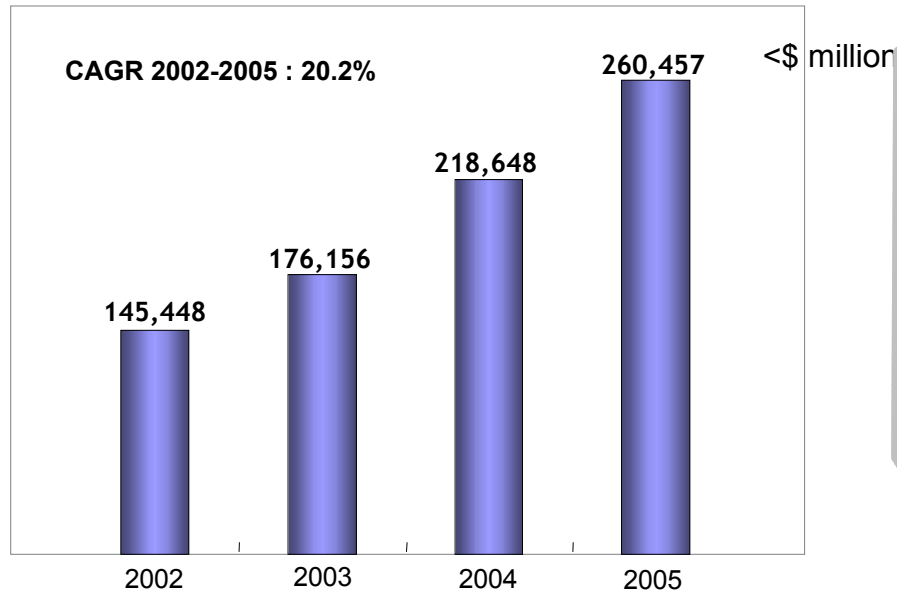
The Value Networking company

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# I. ICT Industry and its Market Prospect

## ICT Industry Market Prospect (KOREA)



**The size of ICT industry market in Korea is expected to grow by 20.2% annually from \$145 billion in 2002 to \$260 billion in 2005.**

	2002	2003	2004	2005	CAGR
ICT service	31,816	36,341	42,141	47,675	14.0%
ICT equipment	69,366	83,841	100,566	120,366	19.6%
Semiconductor	30,191	37,741	47,175	56,616	20.4%
S/W & relevant service	14,075	18,233	28,766	35,800	34.6%
SUM OF ALL	145,448	176,156	218,648	260,457	20.2%

( Source : ETRI REPORT, 2002)

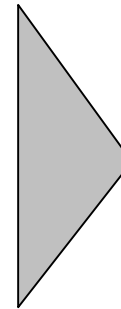
# I. ICT Industry and its Market Prospect

## ■ ICT Business Environmental Change

**Shortened Life Cycle of  
Technology and Services**

**Keen Competition due to  
Collapse of Industry Barriers**

**Increase Uncertainty**



**Crucial Time  
for ICT Service  
(Telecommunication)**

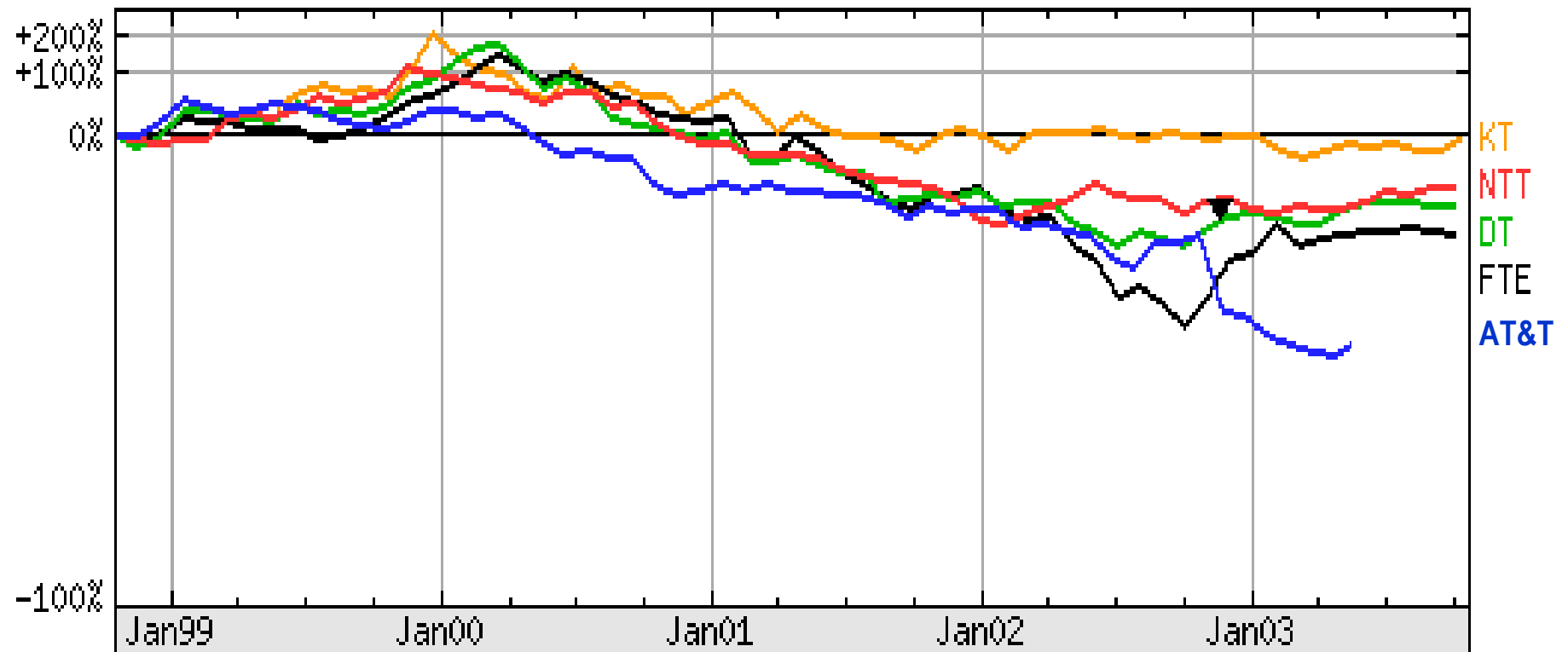
**A combination of factors led to downturn in ICT Service Business**

## I. ICT Industry and its Market Prospect

### ■ Comparative value of Stock

KT CORP

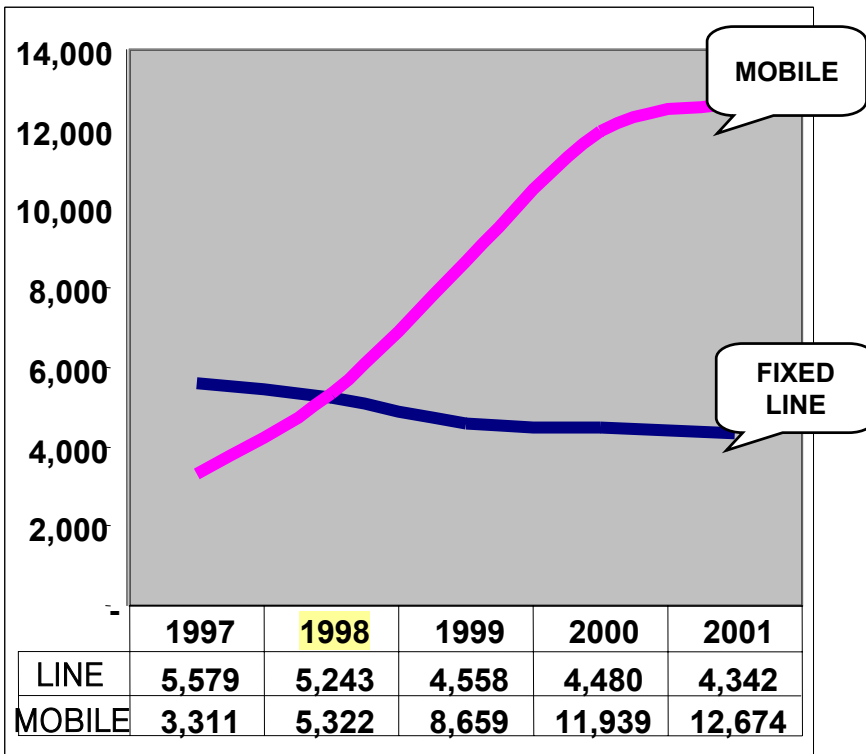
as of 17-Oct-2003



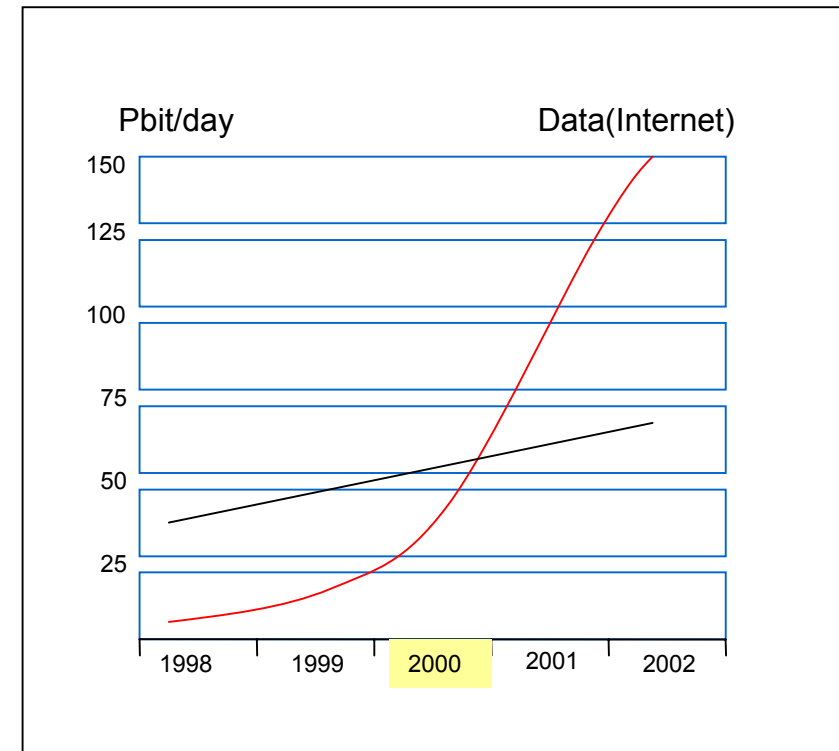
< SOURCE : finance.yahoo.com >

# I. ICT Industry and its Market Prospect

## Voice Market (KOREA) (won Billion)



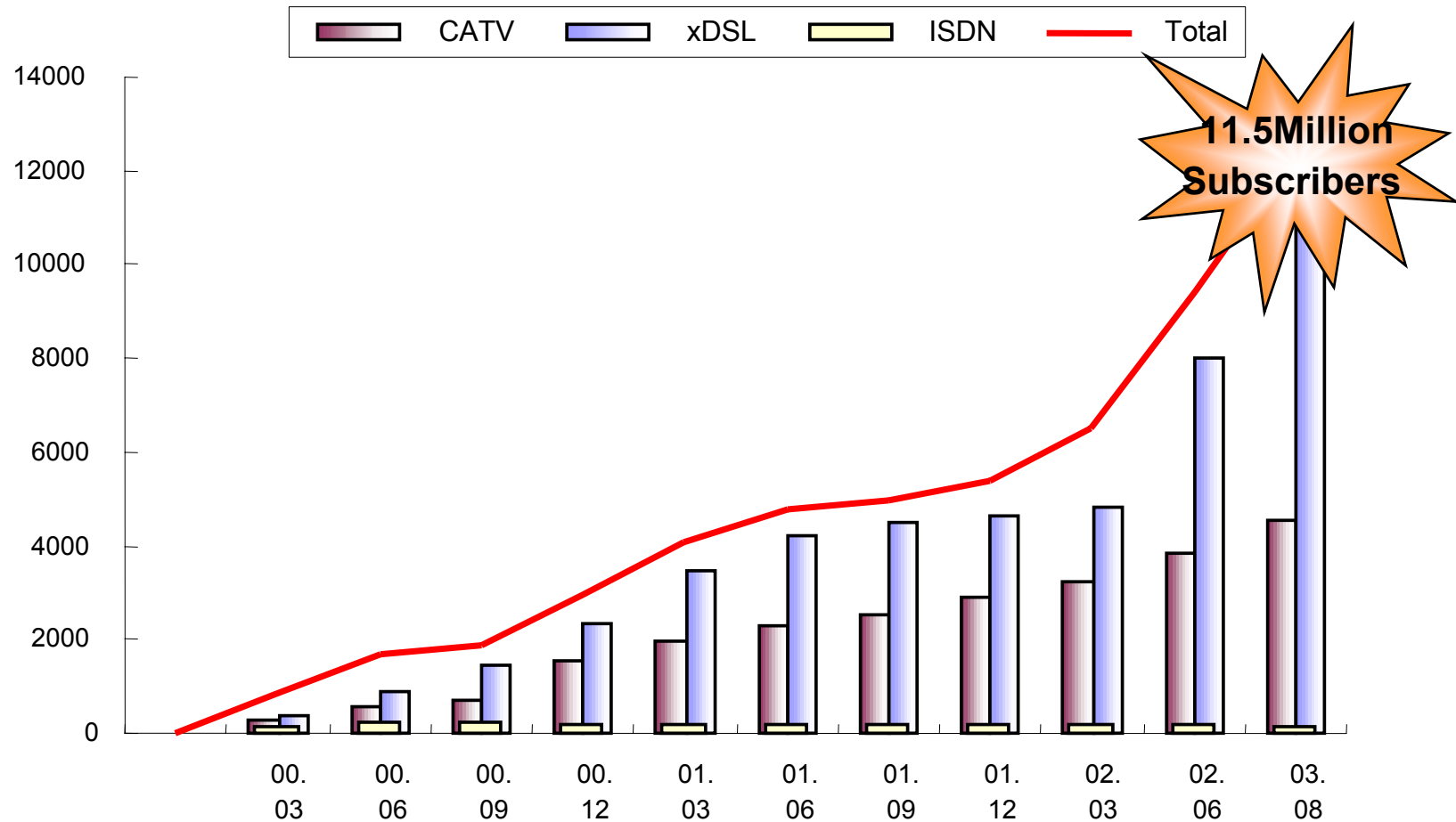
## Access traffic (World)



( Source: Erickson )

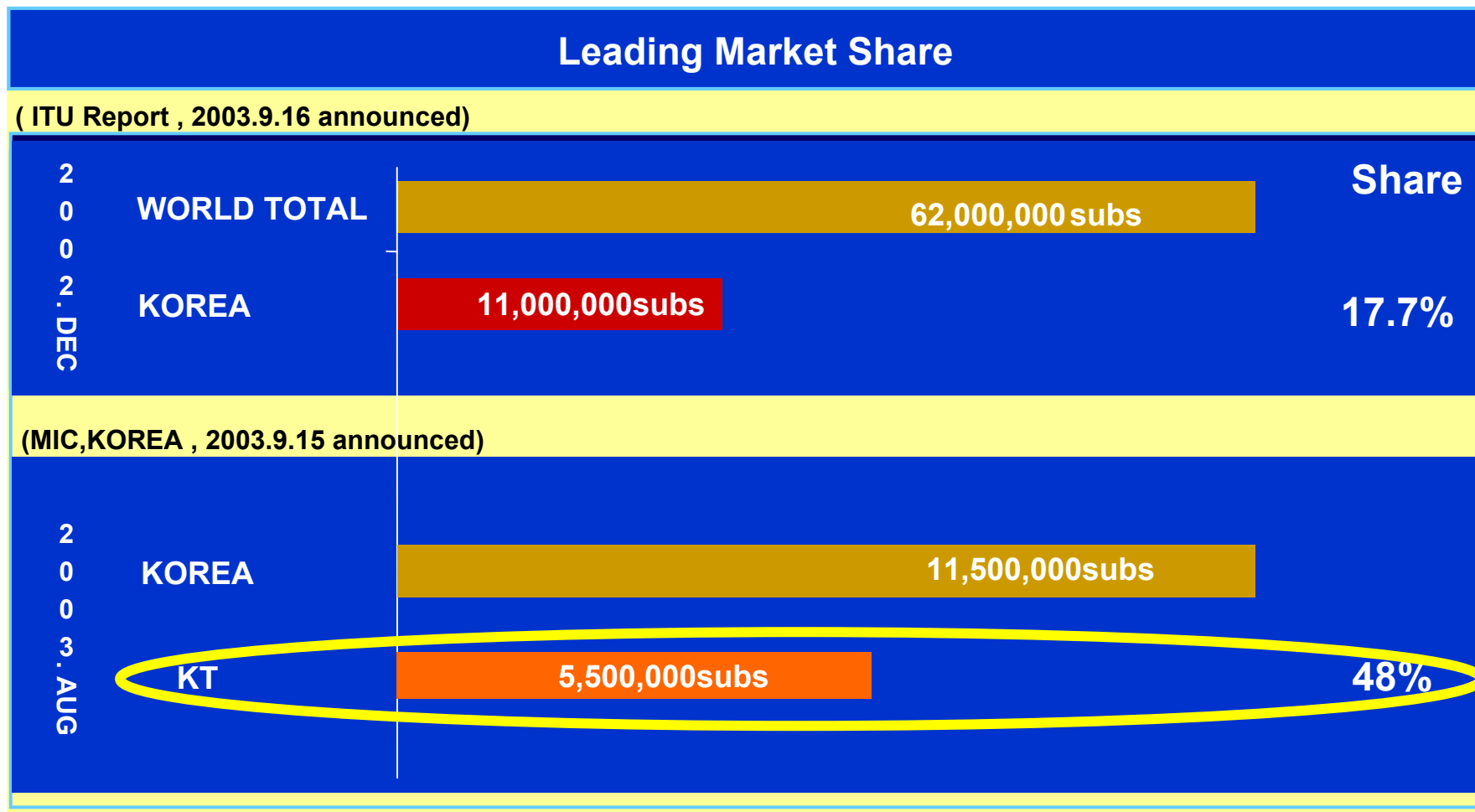
## II . Broadband Access Services in Korea

### ■ Growth of Broadband Access Market in Korea



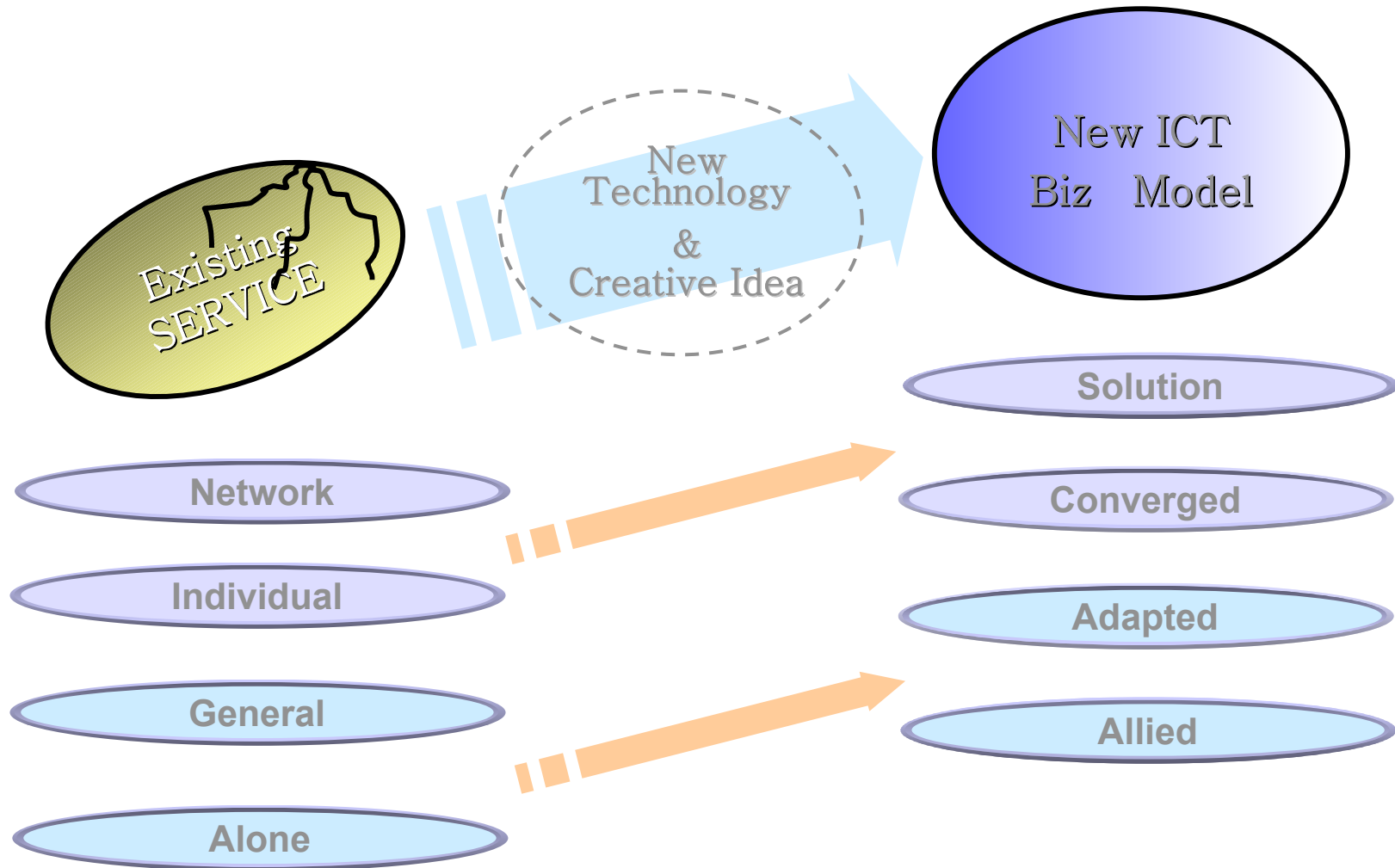
## II . Broadband Access Services in Korea

### ■ BroadBand Market Share





### III. Paradigm Shift in ICT Business



### III. Paradigm Shift in ICT Business

- S/W industry took the lead in value creation

#### Adapted Service

##### Adapted Solution

- Demands for customized services different from mass produced products and services
- Demands for integrated solutions with various functions

##### Business Solution

- Various business solutions, contents, consulting and service platforms targeting small- and medium-sized companies

##### Network Application

- Various application services based on broadband access network

### III. Paradigm Shift in ICT Business

#### Ubiquitous Networking

Any Where

Any Time

Any Device

#### Converged Service

Fixed vs Wireless

Broadcasting  
vs  
Telecommunications

Finance  
vs  
Telecommunications

Automobile  
vs  
IT

Digital appliances  
vs  
IT

.....

Universal Networking Enhances Convenience in Life

### III. Paradigm Shift in ICT Business

- **e-HEALTHCARE, HOME NETWORKING and TELEMATICS** are representative business of high growth potential.

#### **e-HEALTHCARE**

- Enhance quality of life by providing healthcare services/products/information with BT & IT technology via fixed/wireless network

#### **HOME NETWORKING**

- Provide information & home automation services by networking home digital appliances with the Internet and telecom technology

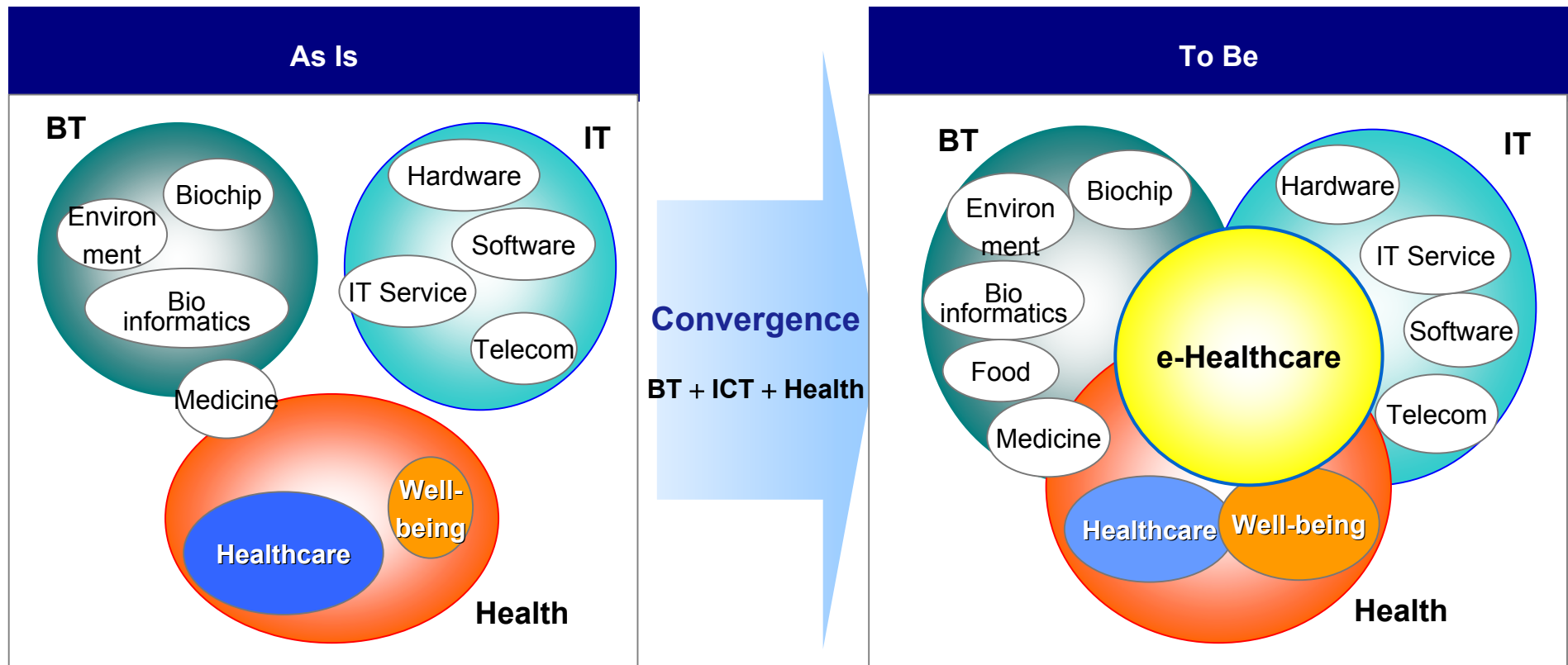
#### **TELEMATICS**

- Provide traffic information and remote automobile diagnosis and location-based services by attaching mobile terminals such as PCS and PDA to automobiles

## IV. e-Healthcare Service

### e-Healthcare ?

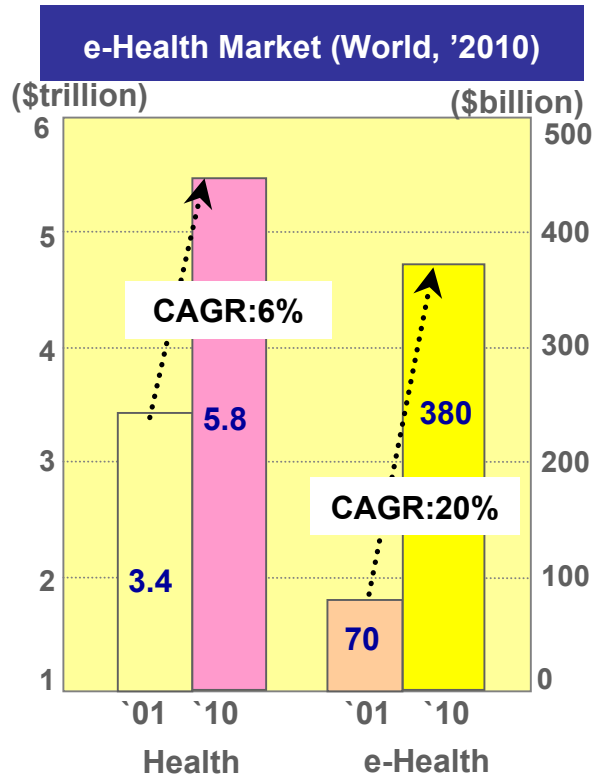
Enhance quality of life by providing healthcare services/products/information with BT & IT technology via ubiquitous network



(Source: Samsung DSC )

## IV. e-Healthcare Service

### ■ Global e-Healthcare Market Prospect

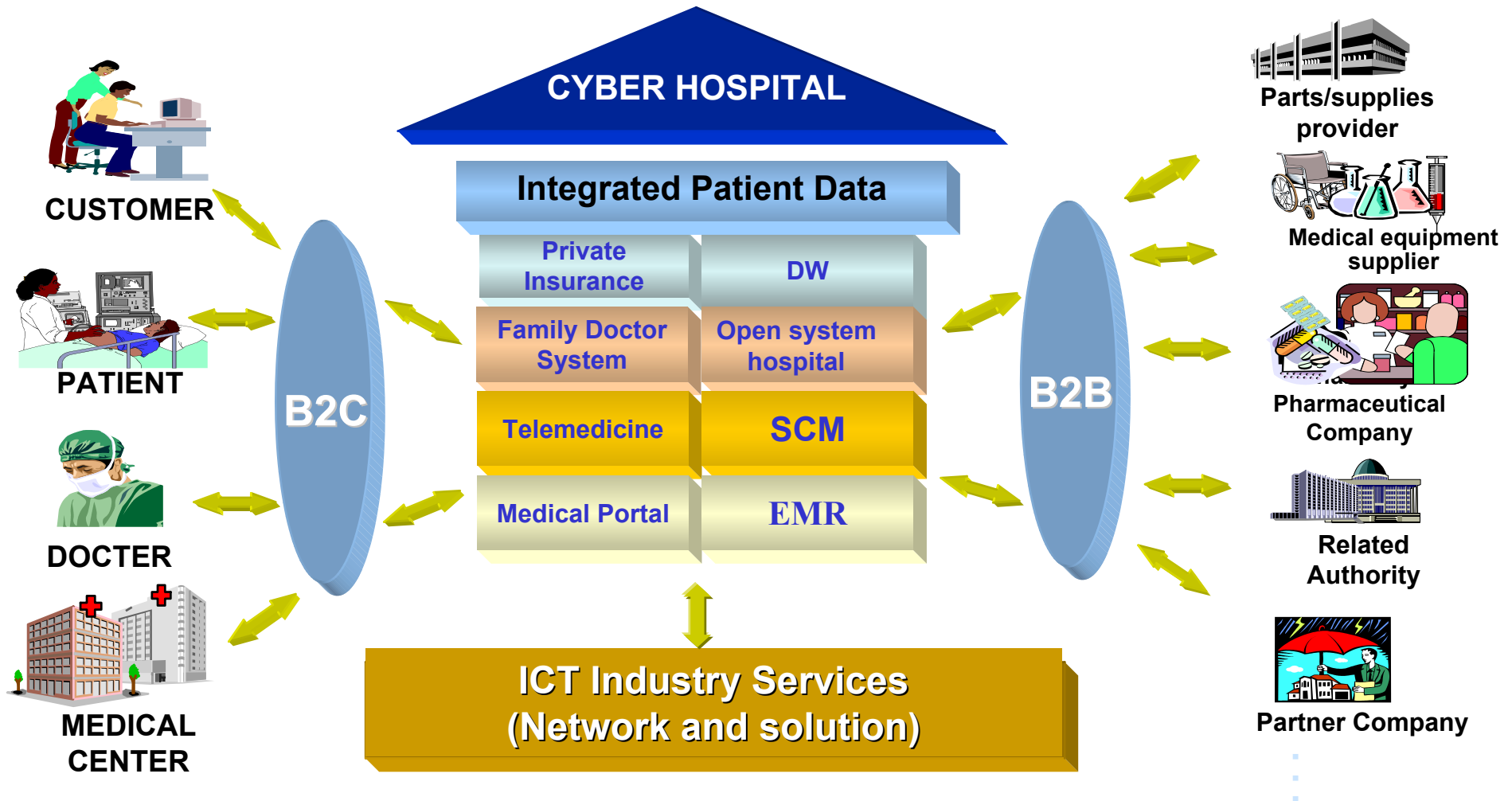


(Source: Mitsubishi Research Institute ('02)  
World Industry Volume Report by Ministry of  
Commerce, Industry and Energy('01))

- **Global Healthcare Market**  
Expected to grow from \$3.4 trillion in 2001 to \$5.8 trillion in 2010
  - As of 2001, healthcare market is twice as big as electronics/parts market (\$1.86 trillion)
- **e-Healthcare Market**  
Expected to grow from \$70 billion in 2001 to \$380 billion in 2010

## IV. e-Healthcare Service

### ■ Future Cyber Hospital with e-Healthcare



### ■ The Prospect of Medical e-Business

#### The Era of Wireless Internet

- Interwork wireless PDA system with HIS
- Share information based on standard protocols

#### Convergence between the Internet and Home Digital Appliances

- Facilitate telemedicine & home diagnosis
- Enable a remote care and assistance for long-term inpatients

#### Increase of Vertical Portals

- Active e-Procurement at medical organizations
- Facilitate information provision to the general public at portal sites
- Expand B2C for growing interest in health food

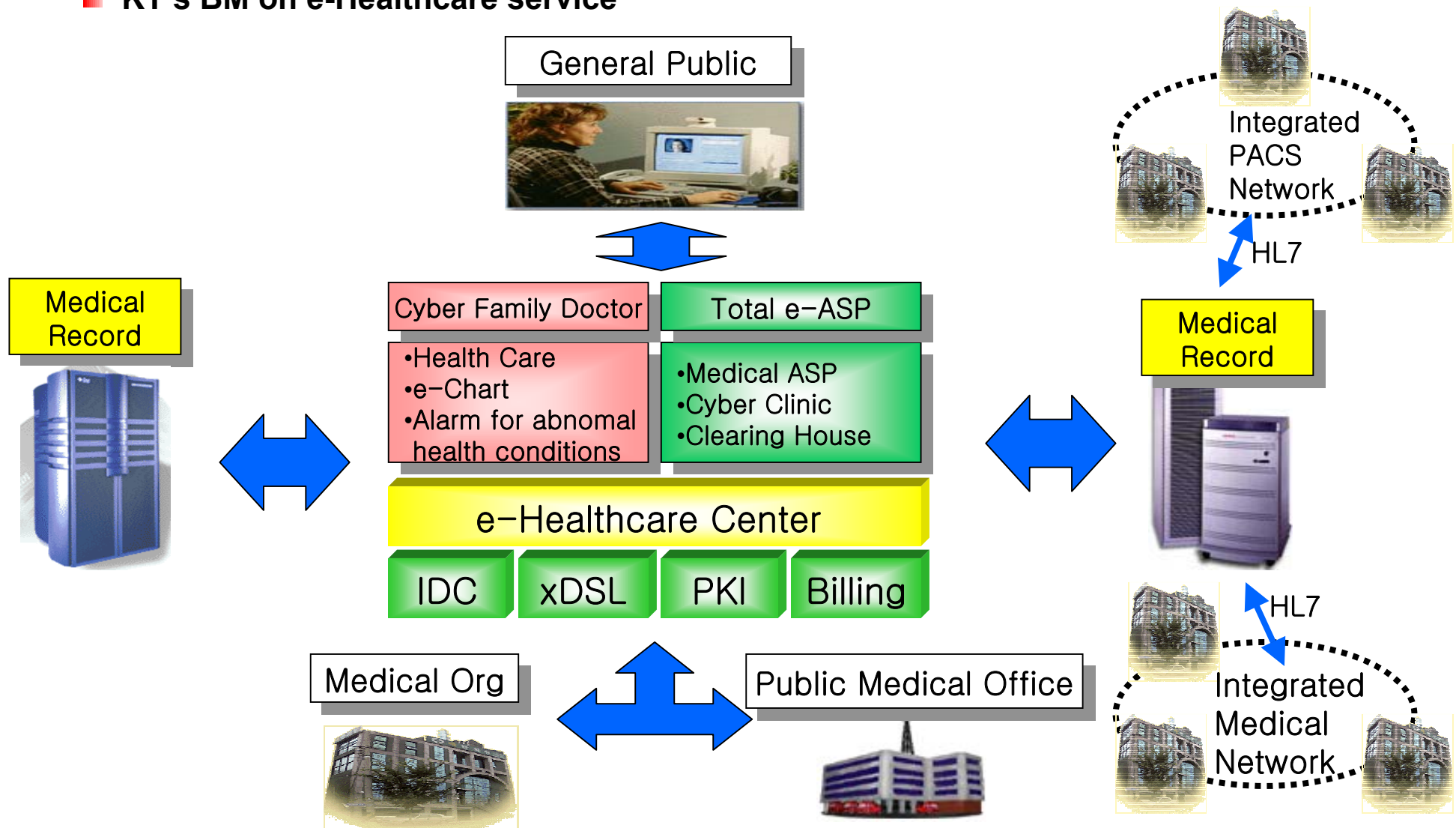
#### Strengthened Knowledge Management

- Strengthen networking among medical organizations
- Standardization of data and transmission protocol – HL7, DICOM etc.
- Emerging Large volume Data Warehouse



## V. Conclusion

### ■ KT's BM on e-Healthcare service



# Thank You

