



Progressing at different speeds towards national e-Health infrastructure and solutions for europe: findings from a study on enabling technologies for e-Health

Professor Wendy Currie and Dr David Finnegan

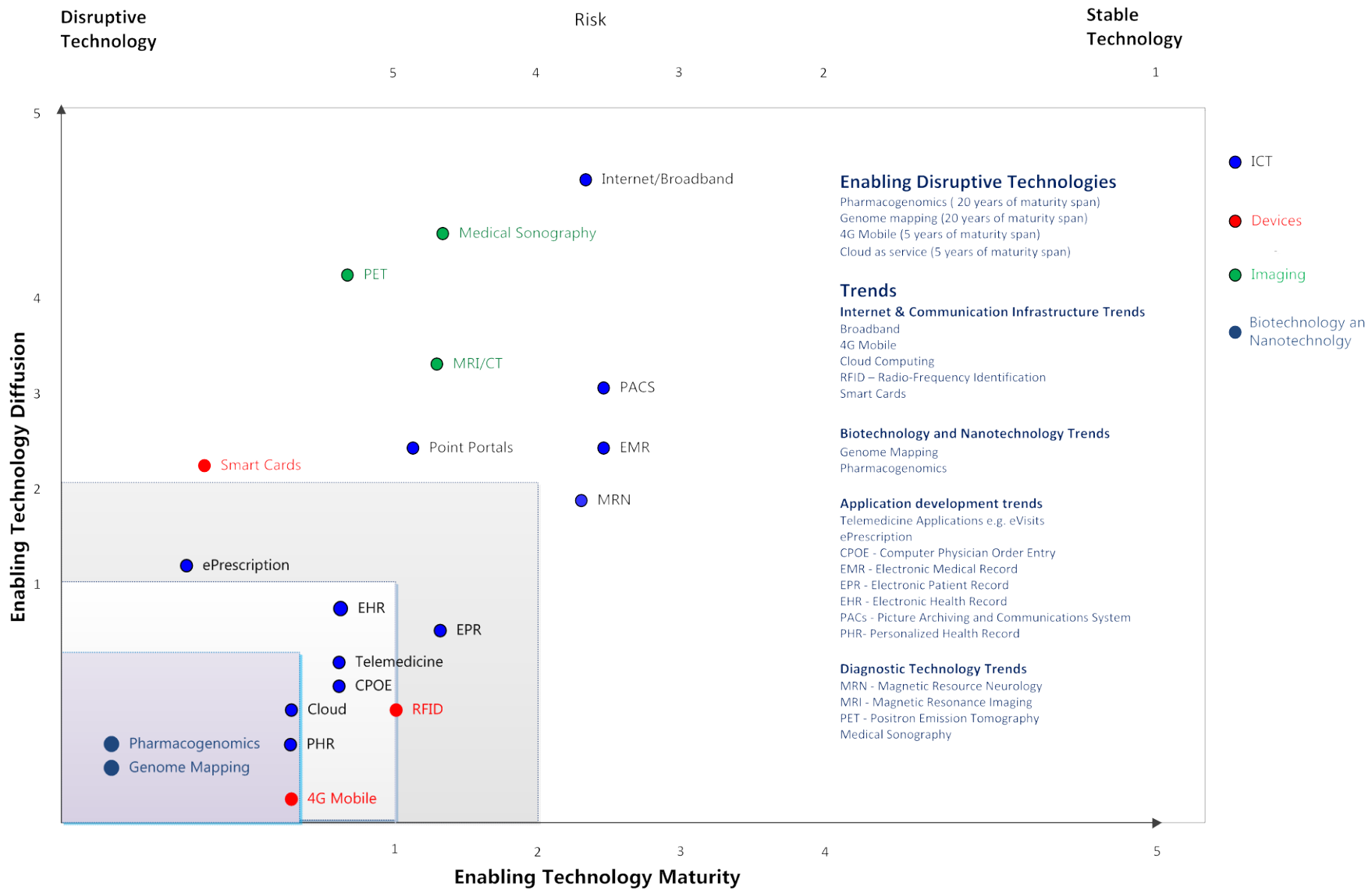
International Policy and Technology Research Unit - Warwick Business School - University of Warwick

Project Scope and Structure

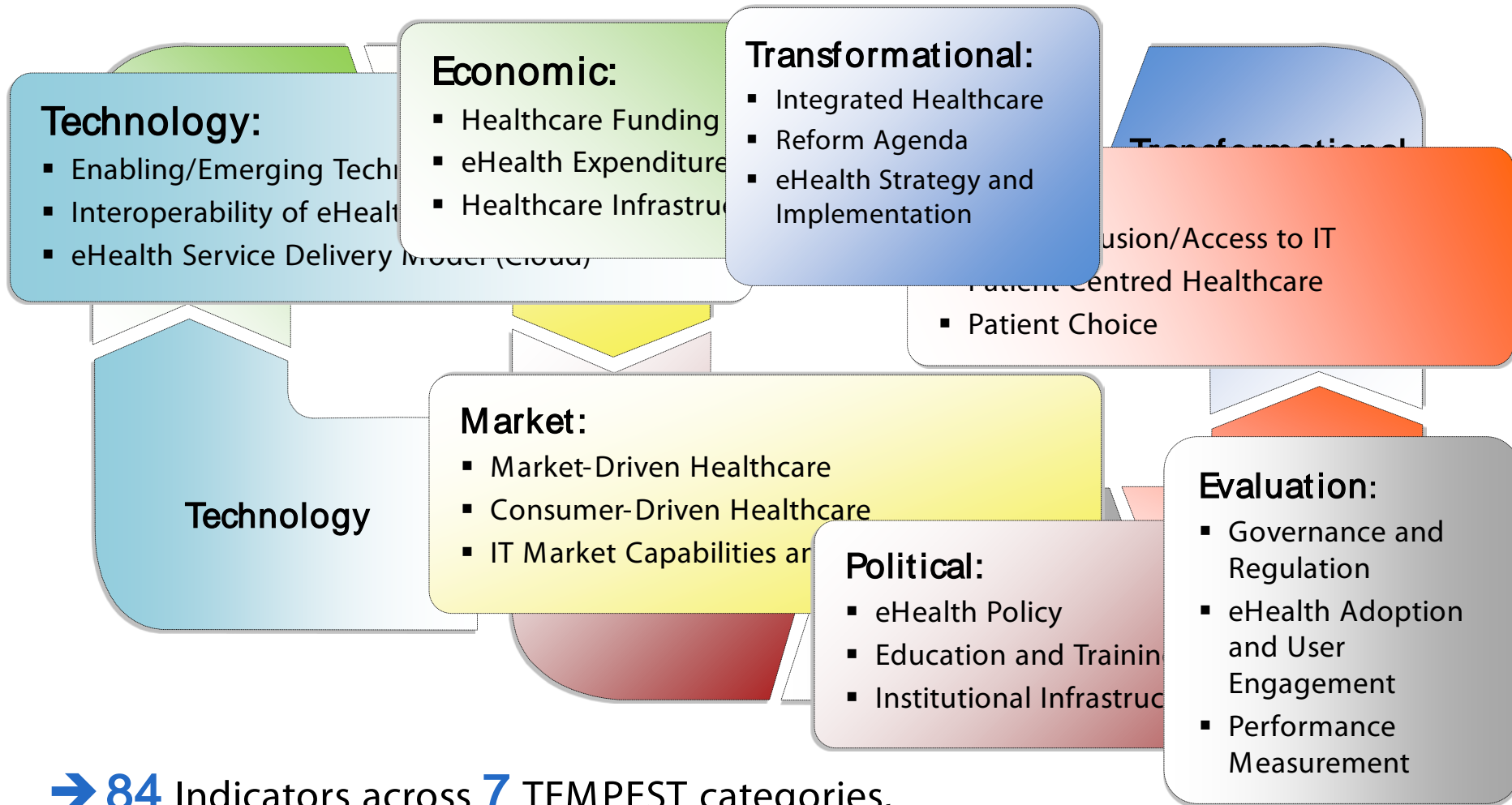
Deliver empirical analysis of the **size and potential** of the European market for **Enabling Technologies** in four thematic areas



Enabling/Emerging Technologies Matrix



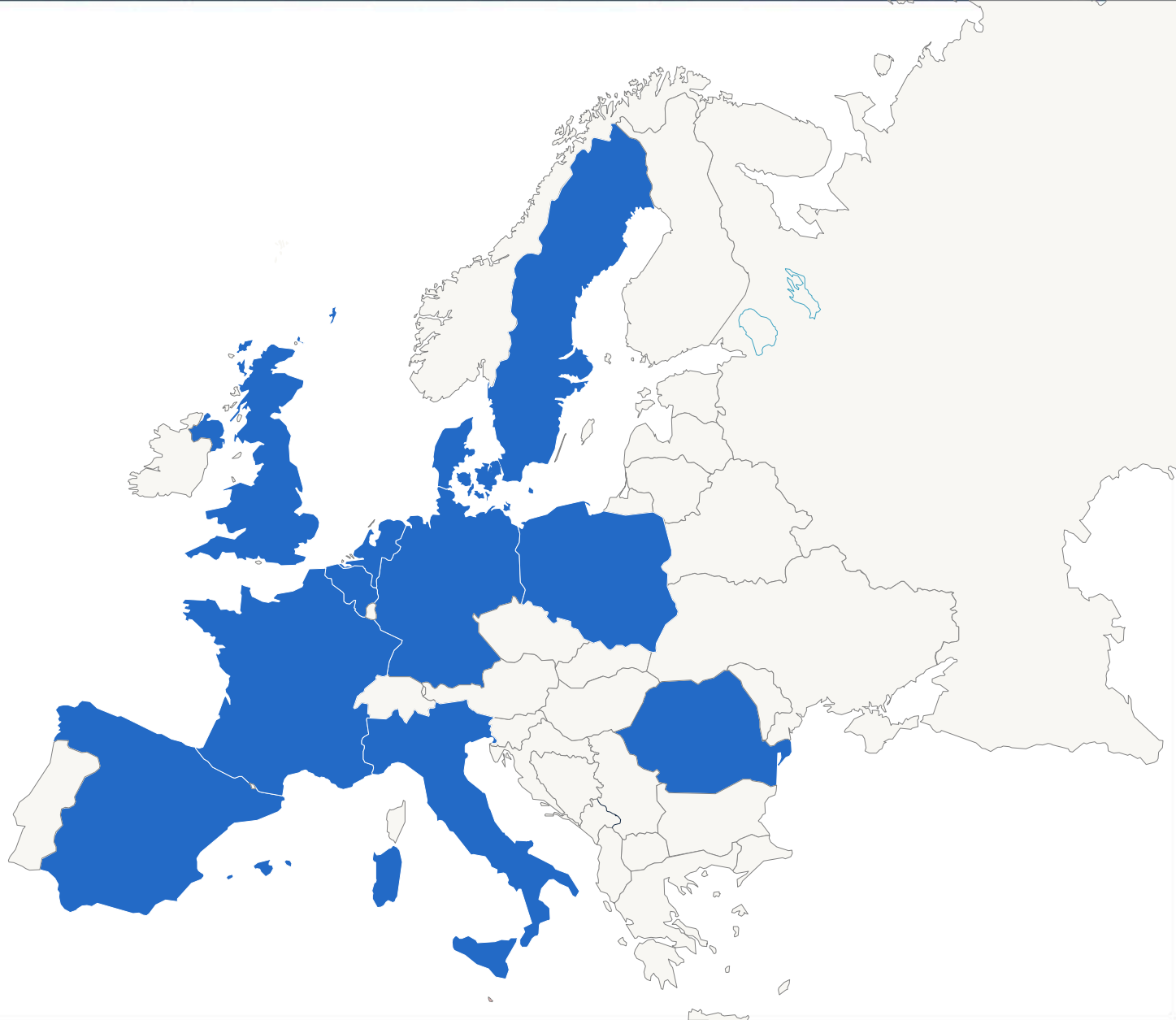
The TEMPEST Model



→ 84 Indicators across 7 TEMPEST categories,
3 sub-categories, 4 indicators per sub-category

TEMPEST model applied to 12 EU member states

- Belgium
- Denmark
- France
- Germany
- Italy
- Malta
- Netherlands
- Poland
- Romania
- Spain
- Sweden
- UK
- Catalonia
(Regional Study)



Eight Priority Areas for a Healthier Europe

Informational eHealth



Transformational ET Health

Fragmented healthcare



Integrated healthcare

Problems with access and mobility



Mobile and accessible

High cost



Affordable

Standardized solutions



Customized/Personalized

IT centric



Patient centric

Poor Clinician and Patient Engagement



Clinical and Patient Buy-In

Perverse incentives



Clear Value Proposition

Re-engineer existing work practices



New Business Models for Health Care

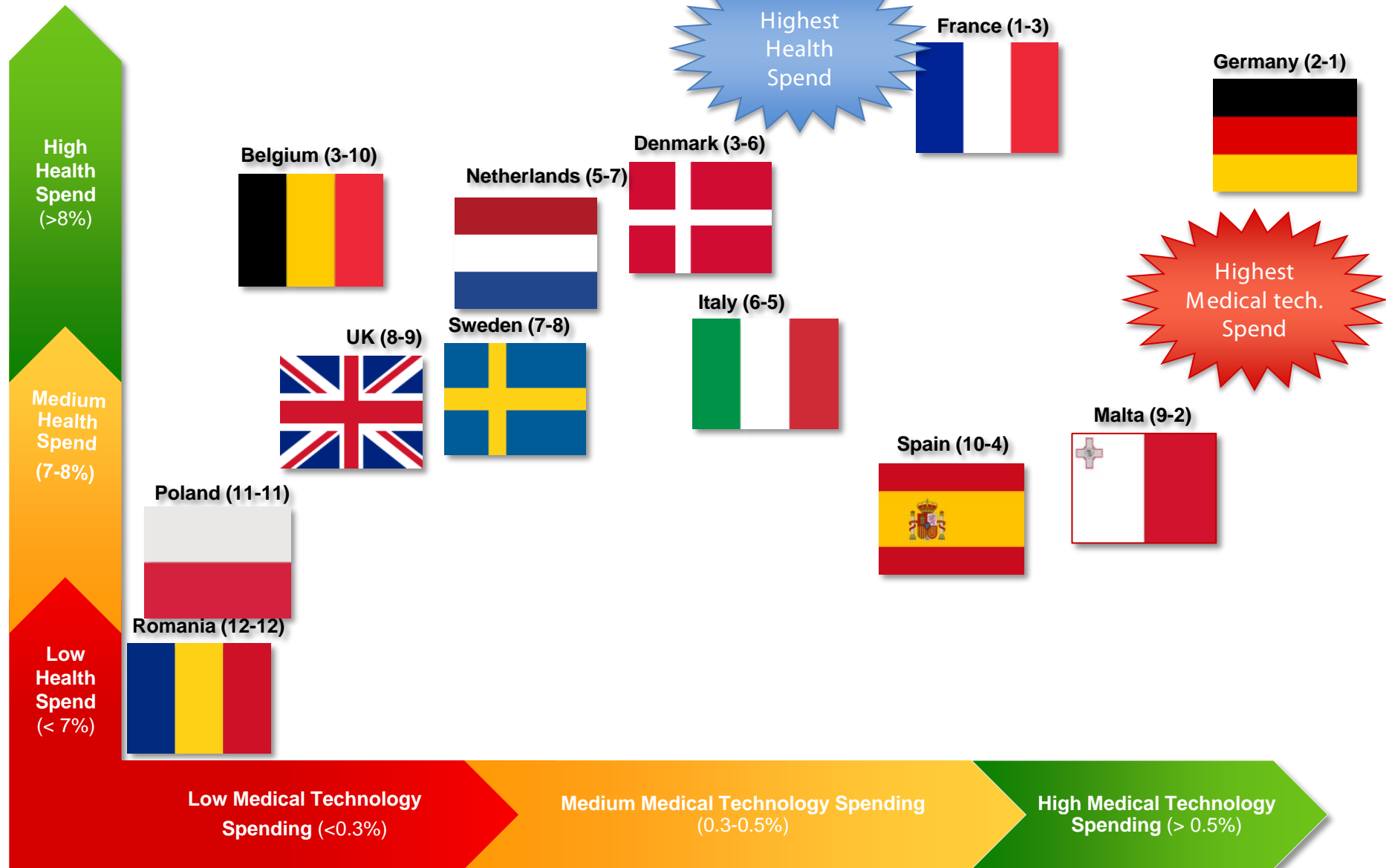
Key ET Findings



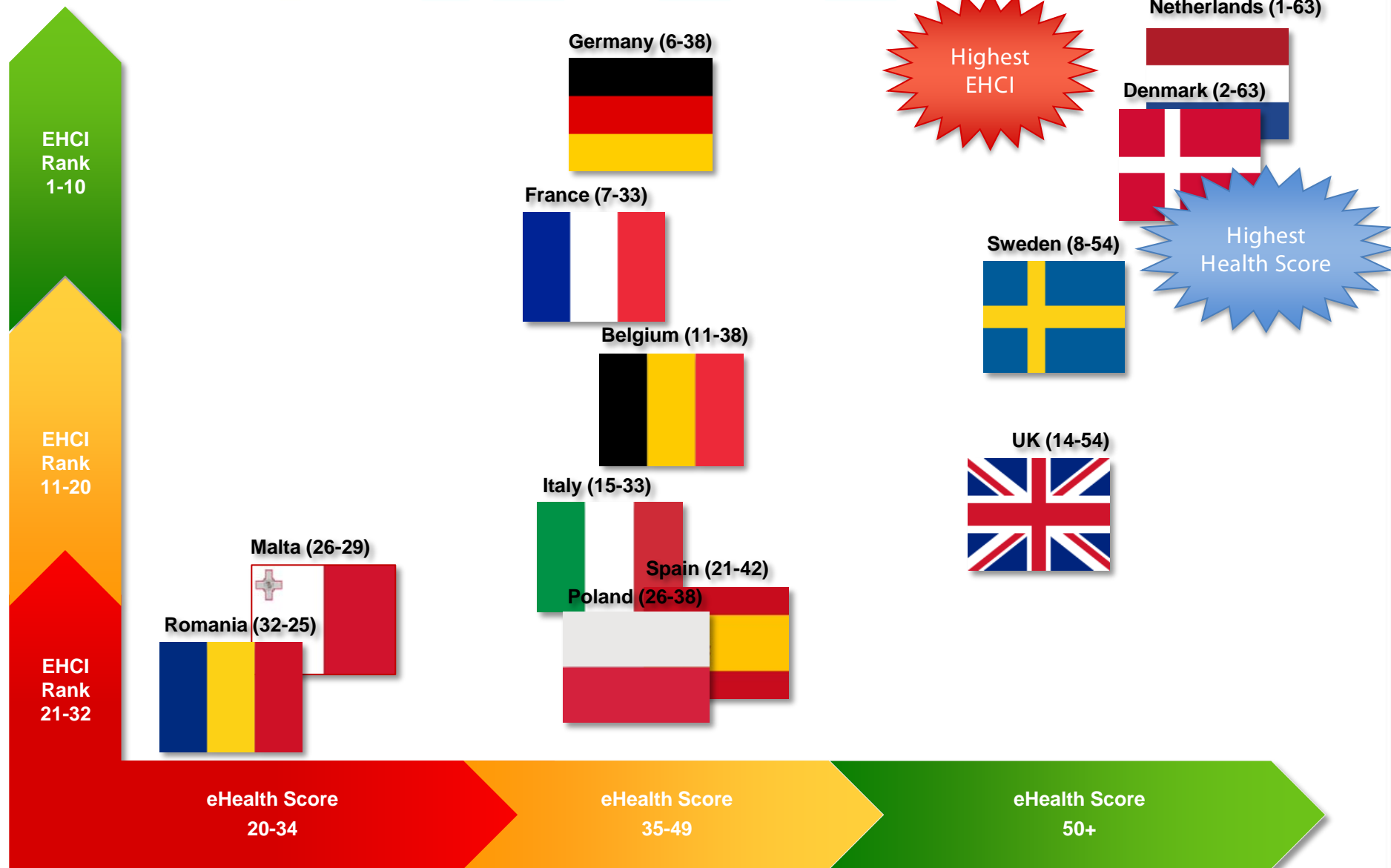
- 5 Enabling Technologies for Transformational HealthCare
 - Electronic Health Records (EHRs)
 - Telemedicine
 - Health Portals
 - Personal Health Records (PHRs)
 - Cloud Computing

- EU and Member State policy to complement existing initiatives (i.e. EPSoS)
- eHealth policy is highly fragmented across the EU
- Research, education and training in single disciplinary silos
- Health Technology Assessment (HTA) needs to go beyond evaluating technical factors
- Poor stakeholder engagement continues to inhibit progress on eHealth
- Regional approach to eHealth more effective than top-down implementations
- Citizen-centric health is a medium to long term target
- EU health budgets need to be rebalanced to target expenditure on health and well-being (prevention and lifestyle - around 3% of Member States' total budgets for health) compared with diagnosis and treatment (around 97%)

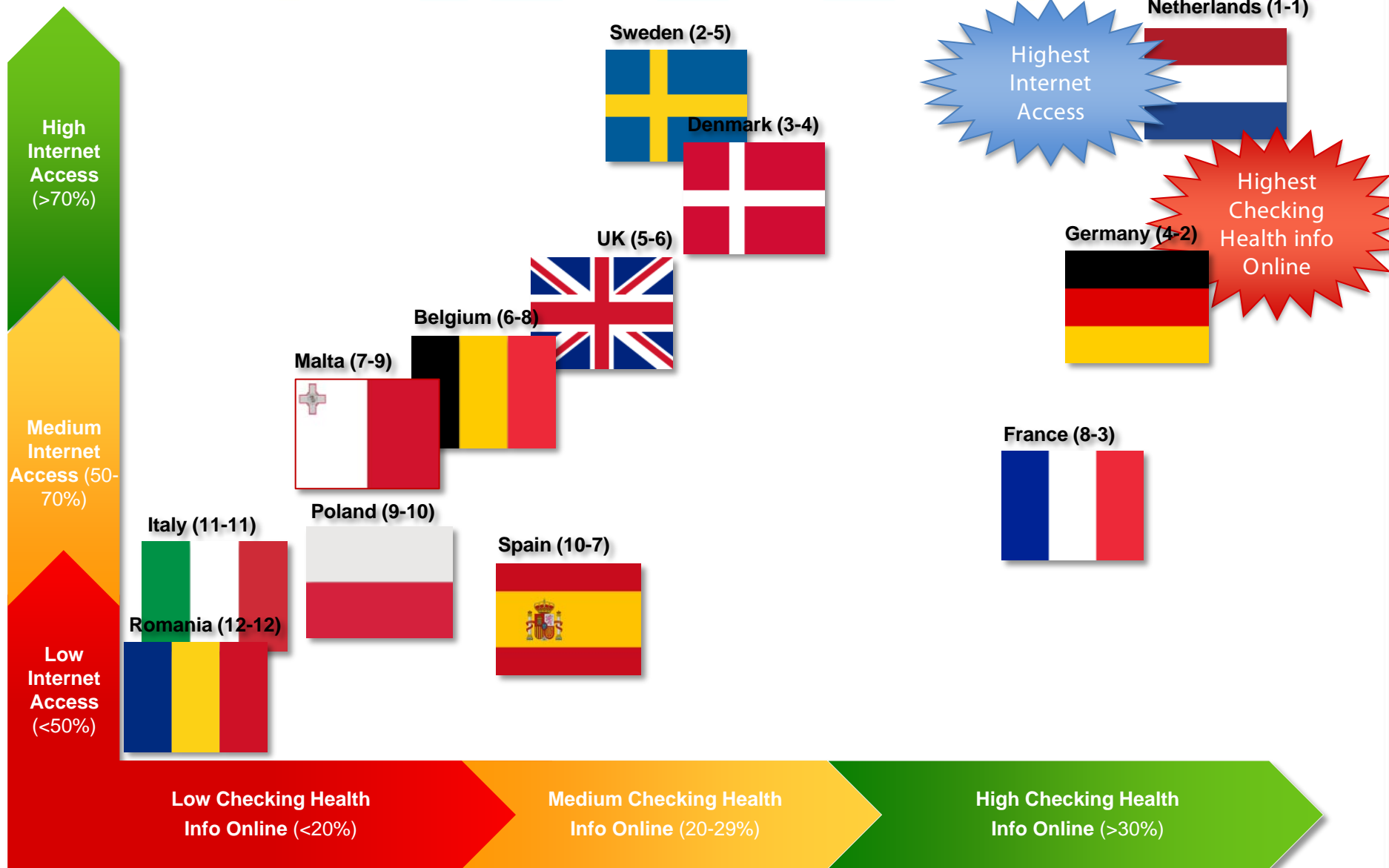
Health Spending and Medical Technology Spend



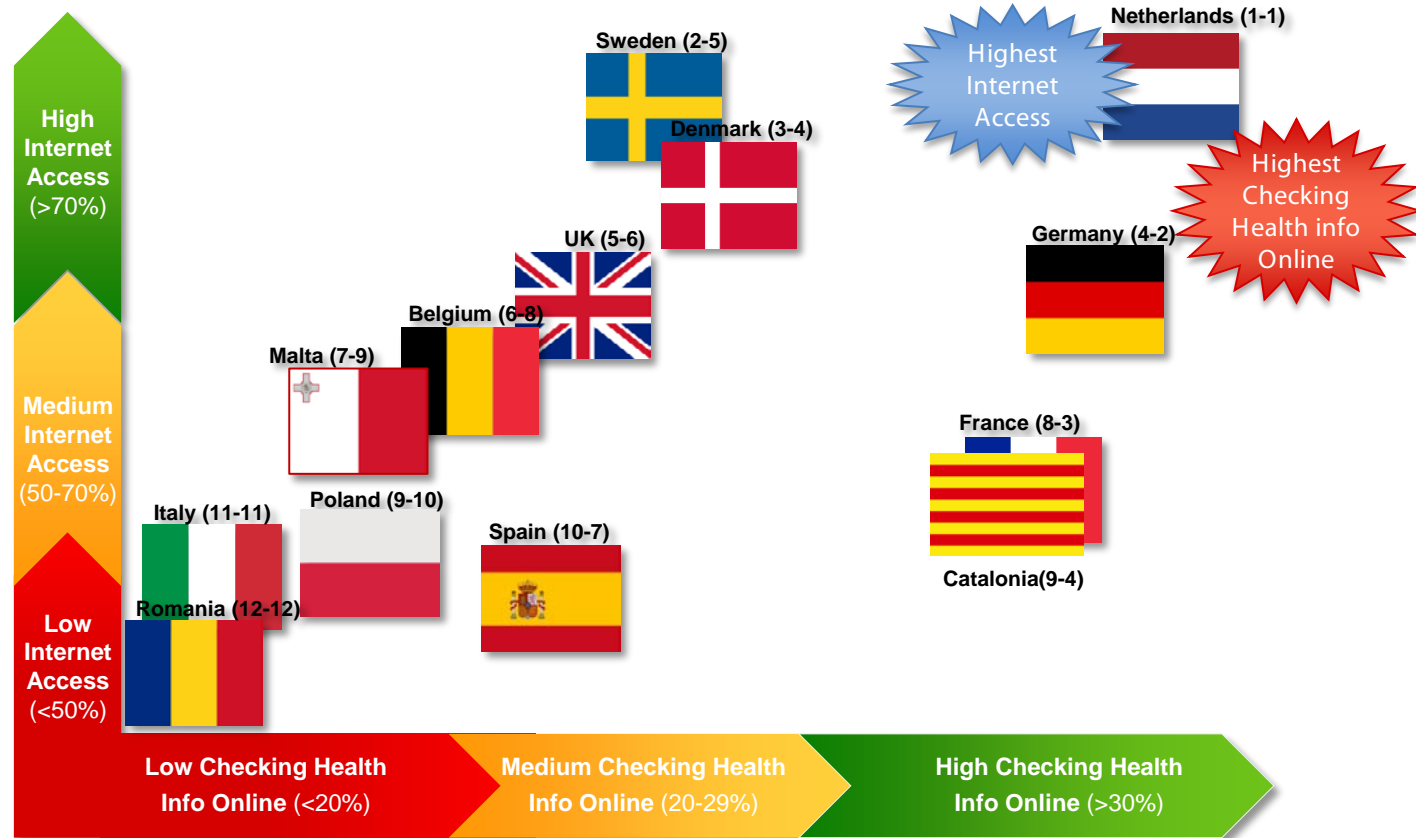
*EuroHealth Consumer Index and eHealth Score



Internet Access and Checking Health Info Online



Internet Access and Checking Health Info Online including Catalonia

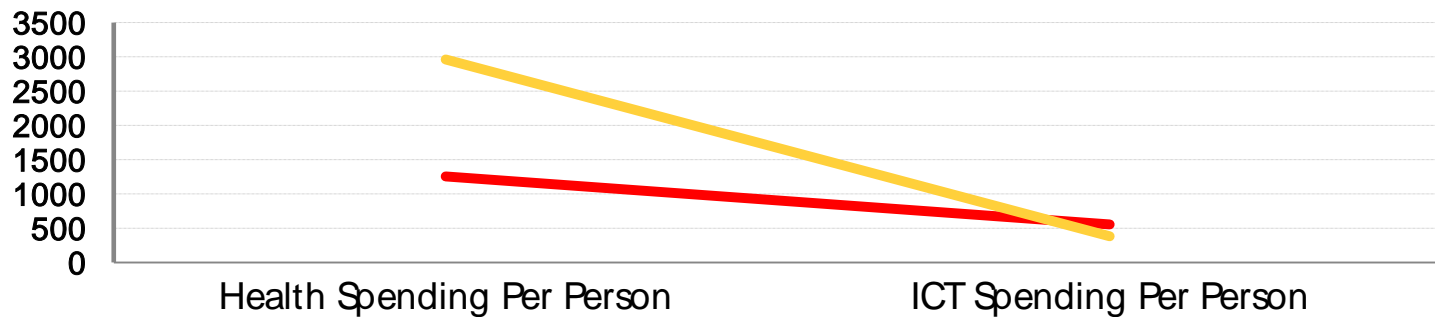


- Catalonia is situated in the 9th position in terms of Internet access (62% of the total population) and 4th in population seeking information on health issues (38%).
- Note that this is 38% out of the total number of Internet users and not the total number of population.
- Catalonia's numbers are similar to France (63% and 39% respectively) scoring higher than Spain.



Health and IT spending in Catalonia and Spain

Health and ICT Spending per Person (Catalonia and Spain)



— Catalonia

1255

555

— Spain

2961

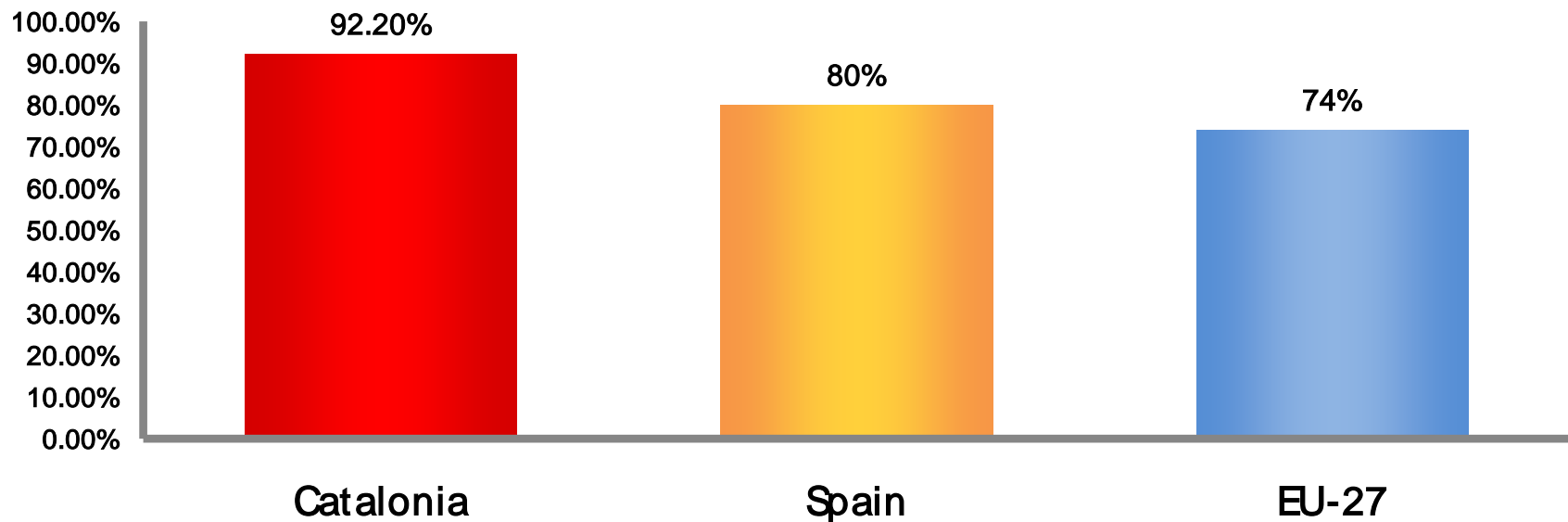
382

- In 2009 Healthcare budget as % of GDP was 8.1 in Spain and 7.2 in Catalonia (DoH, 2009)
- Catalonia eHealth Return-on-Investment and eHealth capabilities higher than Spain
- Regional approach with de-centralised decision-making is effectiveness

GP practices receiving professional IT support

Catalonia, Spain and EU-27

GP practices receiving professional IT support

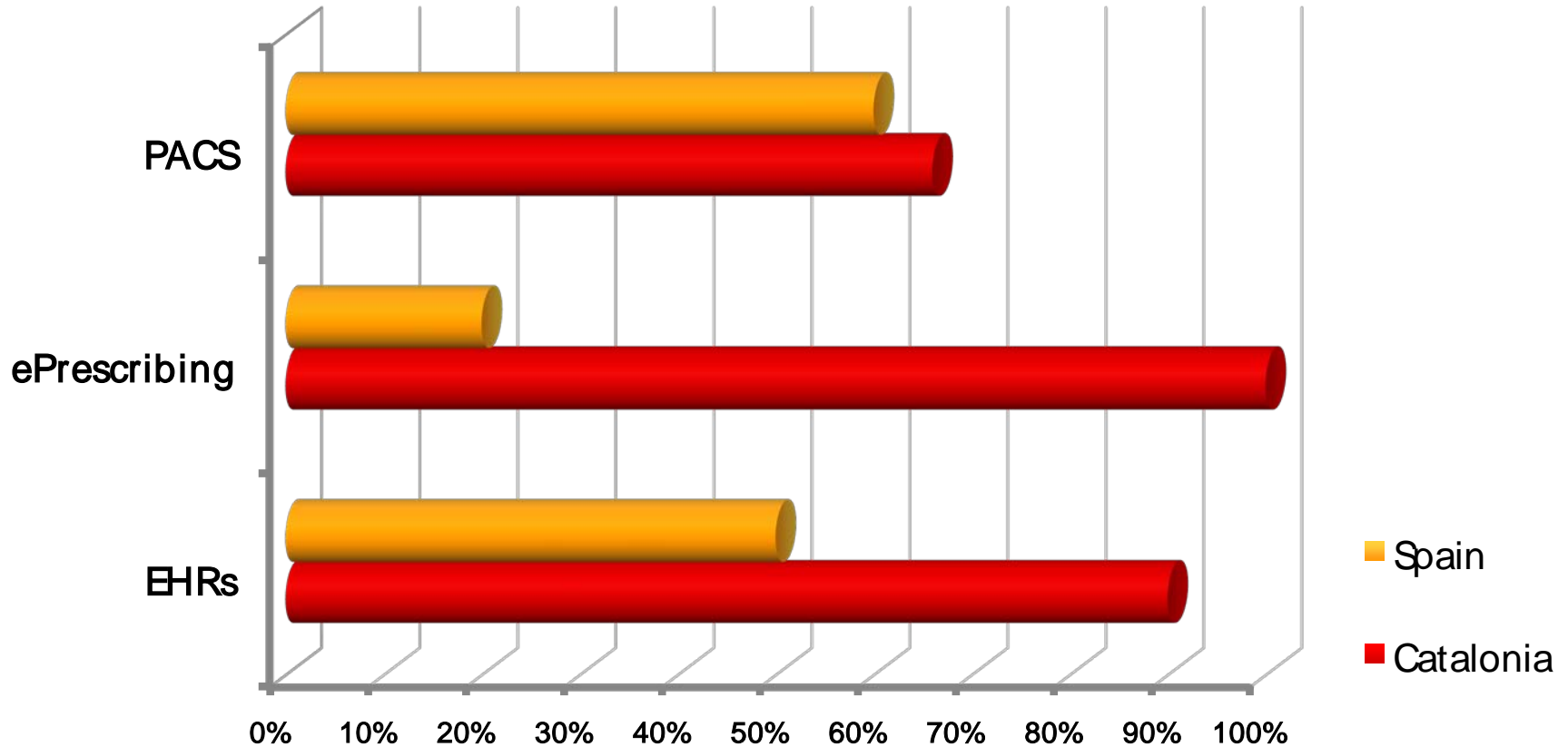


- Regional e-Health policy closely matched to implementation
- Catalonia offers IT support in more than 92% of its GP practices, which is significantly higher than the EU-27 average (74%), surpassing Spain at 80%

ET Progress Catalonia v. Spain

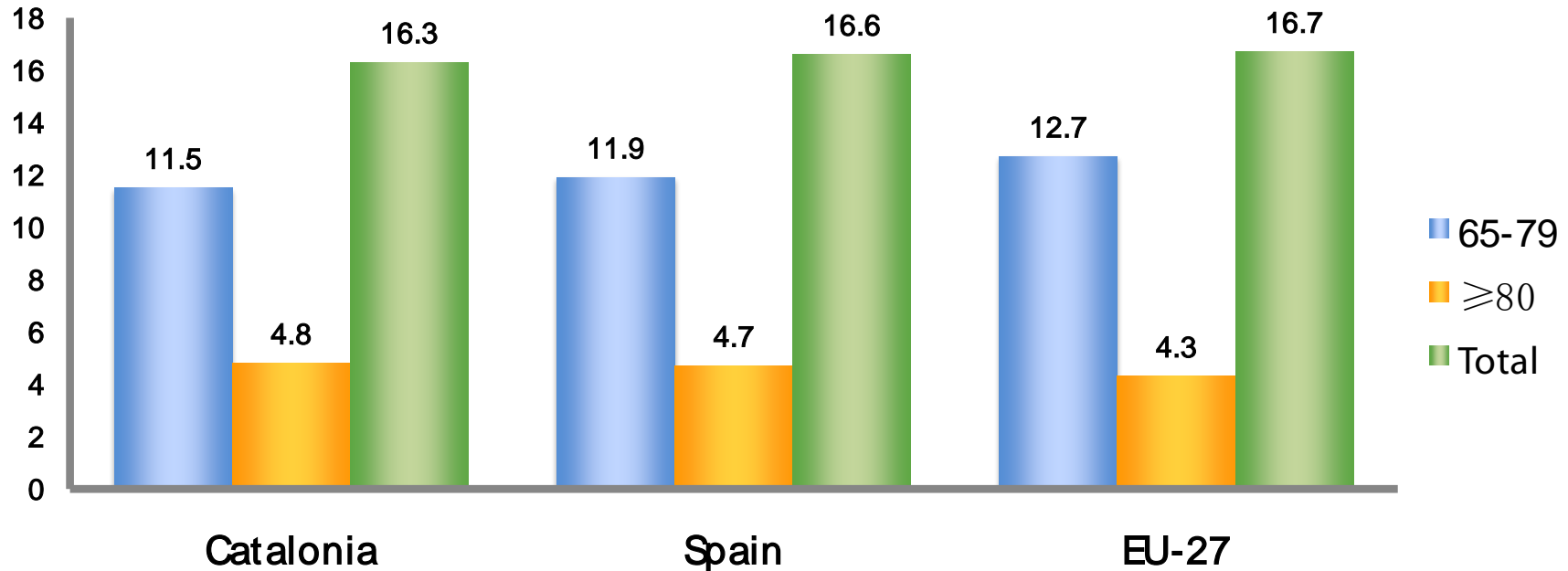


Enabling technologies implementation progress

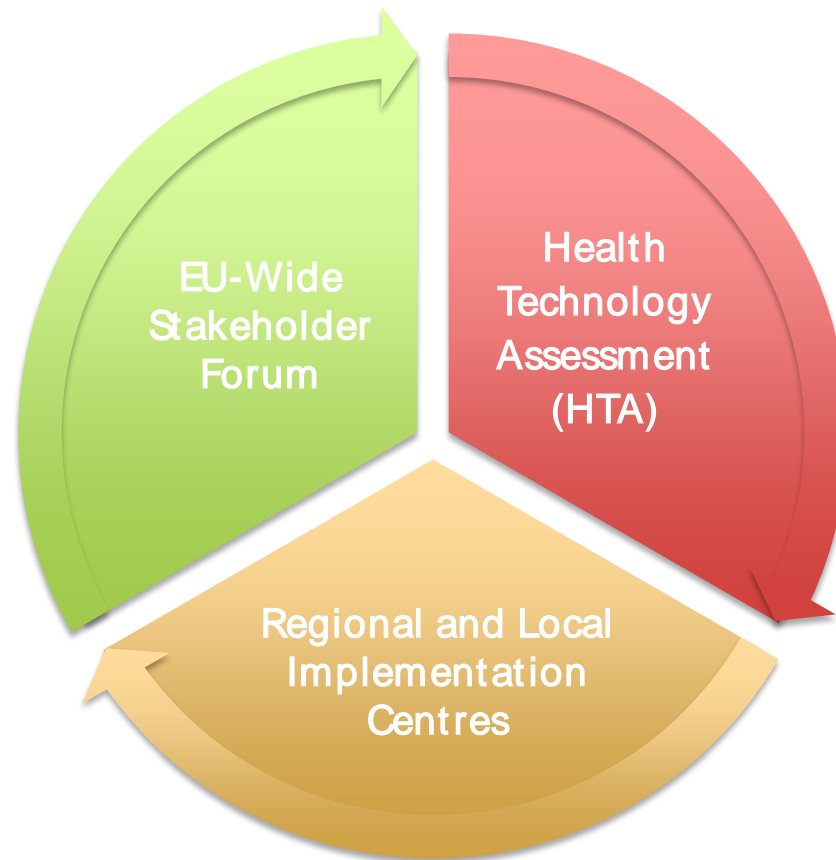


Progress on Social Alarms, Catalonia, Spain and EU

Take-up of Social Alarms (% older people aged 65 years or older)

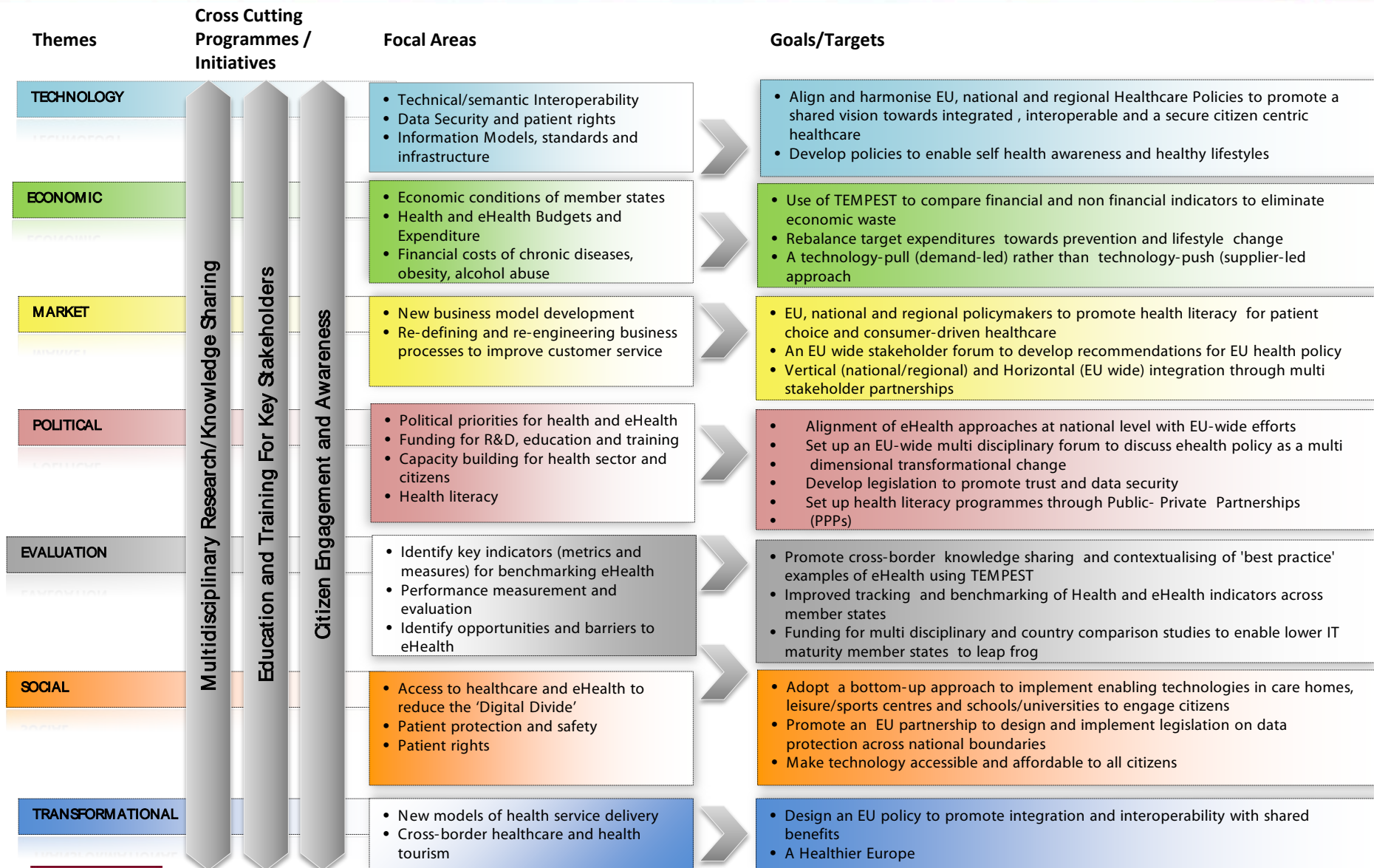


- Catalonia has similar numbers in terms of people aged 65 or older (16.3%) than the rest of Spain (16.6%) and EU-27 (16.7%). In Catalonia, this number has continuously increased since 1980, when it represented 11% of the total population. The data for this indicator was obtained from IDESCAT.



EDUCATION, ENGAGEMENT and EVALUATION

TEMPEST eHealth Roadmap





Thank you!
Any questions



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