The Hine project: results of the eHospital Census

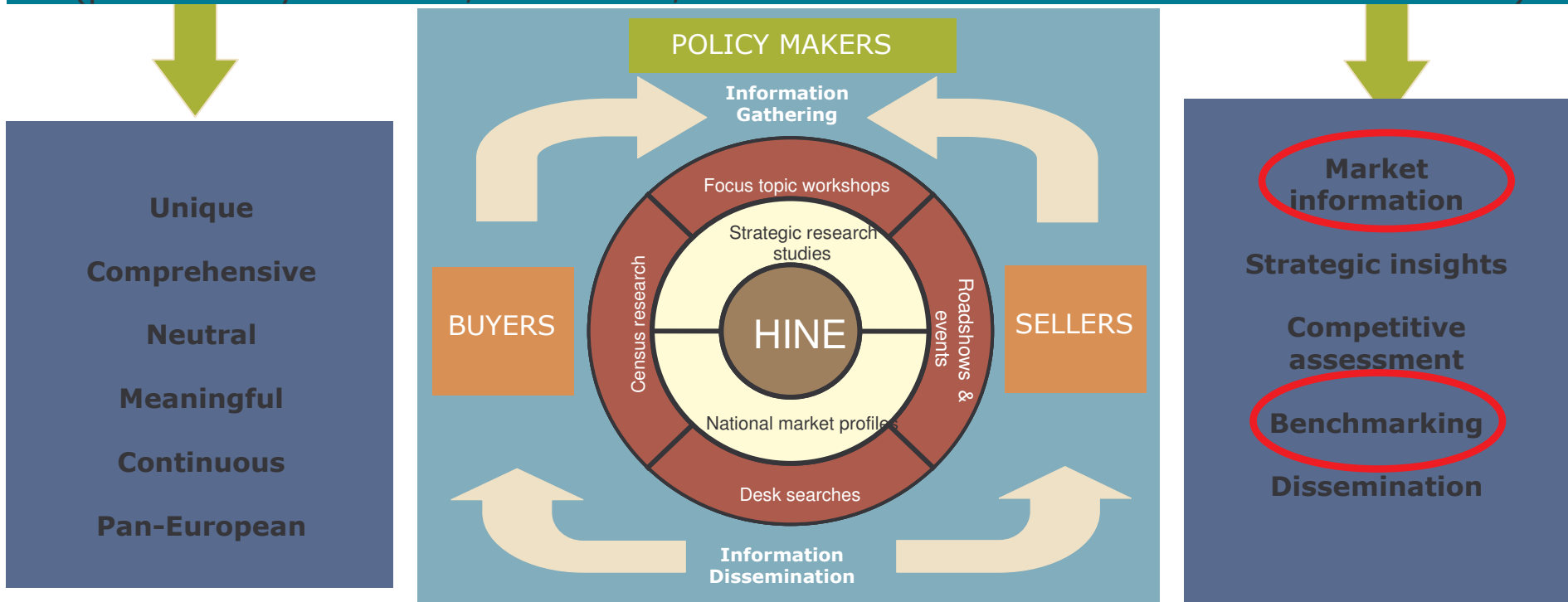**Ingrid Moldenaers**
Deloitte
Good eHealth project manager
HINE project manager

imoldenaers@deloitte.com
+ 32 (0)2 800 28 71

Strategic objectives for HINE

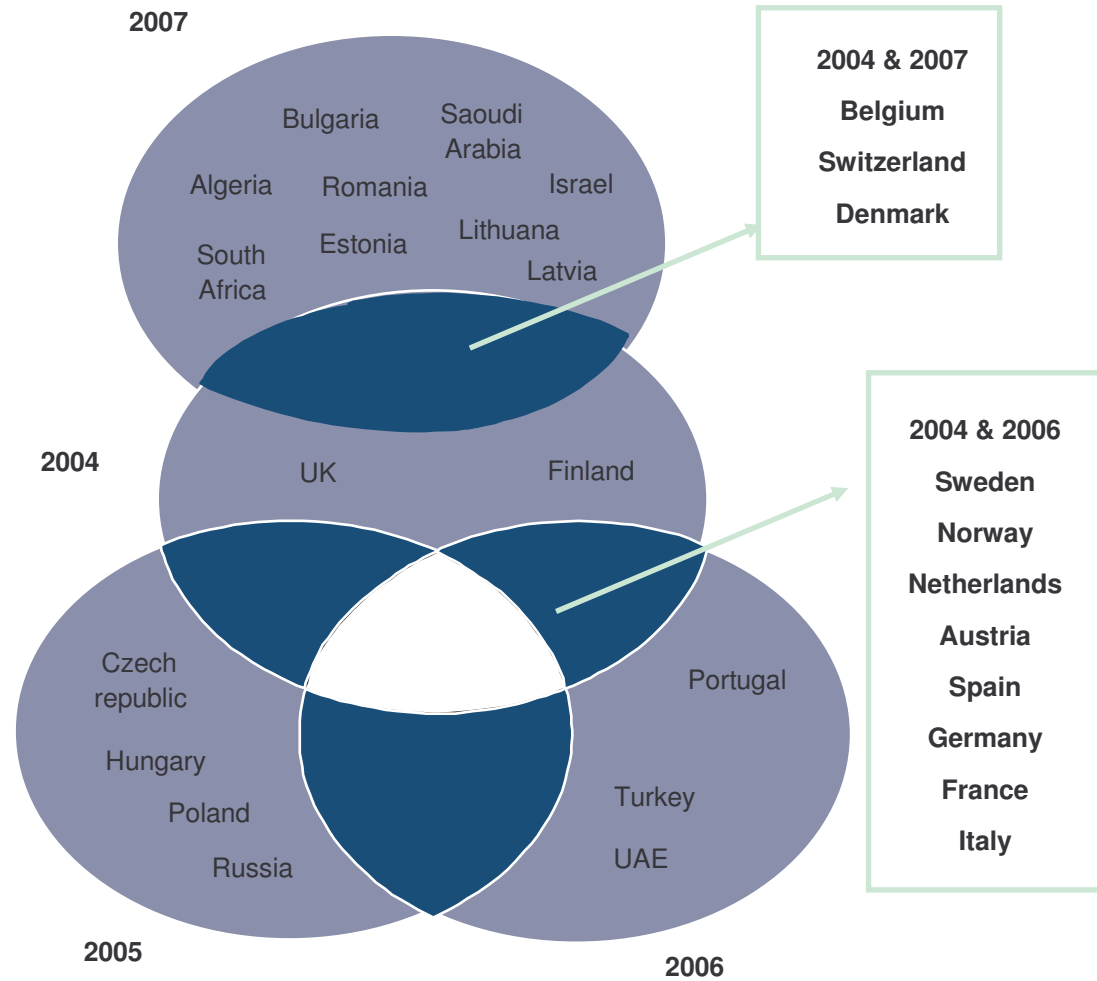## MISSION OF HINE

Assist its subscribers in FOSTERING eHealth roll-out
by means of
one stop access to key eHealth information
(present day situation, evolutions, future needs & demands of all relevant actors)

Unique

Comprehensive

Neutral

Meaningful

Continuous

Pan-European

POLICY MAKERS

Information Gathering

Focus topic workshops

Strategic research studies

Census research

HINE

Roadshows & events

BUYERS

SELLERS

National market profiles

Desk searches

Information Dissemination

Market information

Strategic insights

Competitive assessment

Benchmarking

Dissemination

HINE provides unique, neutral and valuable strategic and business insights regarding eHealth

for the benefit of and under the supervision of the HINE Governing Board

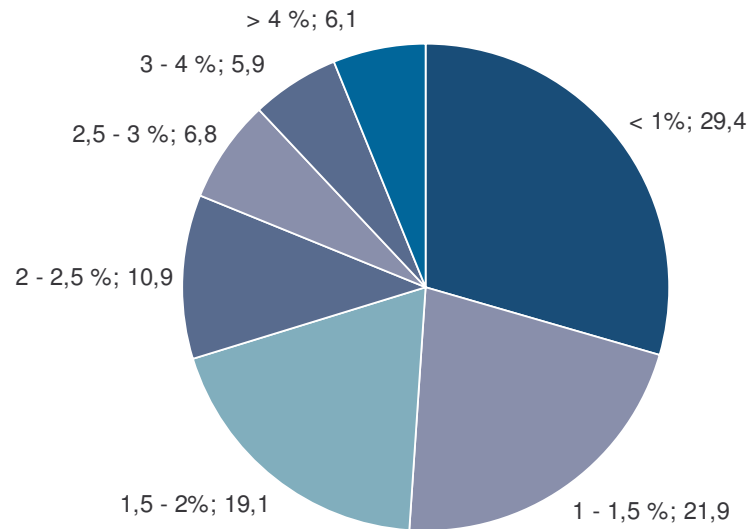# Essentials of the HINE eHospital Census exercise

- Survey of general acute hospitals (> 100 beds)
- Started in 2004 – ongoing initiative
- Countries covered
  - Focus on 2006 results (720 hospitals)
  - Comparison 2004 results (900 hospitals)
- Focus on a limited number of questions

2007

Bulgaria   Saoudi Arabia

Algeria   Romania   Israel

South Africa   Estonia   Lithuana   Latvia

2004

UK   Finland

Czech republic

Hungary

Poland

Russia   Portugal

Turkey

UAE

2005

2006

2004 & 2007
Belgium
Switzerland
Denmark

2004 & 2006
Sweden
Norway
Netherlands
Austria
Spain
Germany
France
Italy

ICT spending in European hospitals 2004 - 2006

IT department budget as part of the whole hospital budget

2004

- > 4 %; 6,1
- 3 - 4 %; 5,9
- 2,5 - 3 %; 6,8
- 2 - 2,5 %; 10,9
- < 1%; 29,4
- 1 - 1,5 %; 21,9
- 1,5 - 2%; 19,1

Source: Hine eHospital Census 2004

2006

- > 4%; 9,6
- 3 - 4 %; 6,4
- 2,5 - 3 %; 3,0
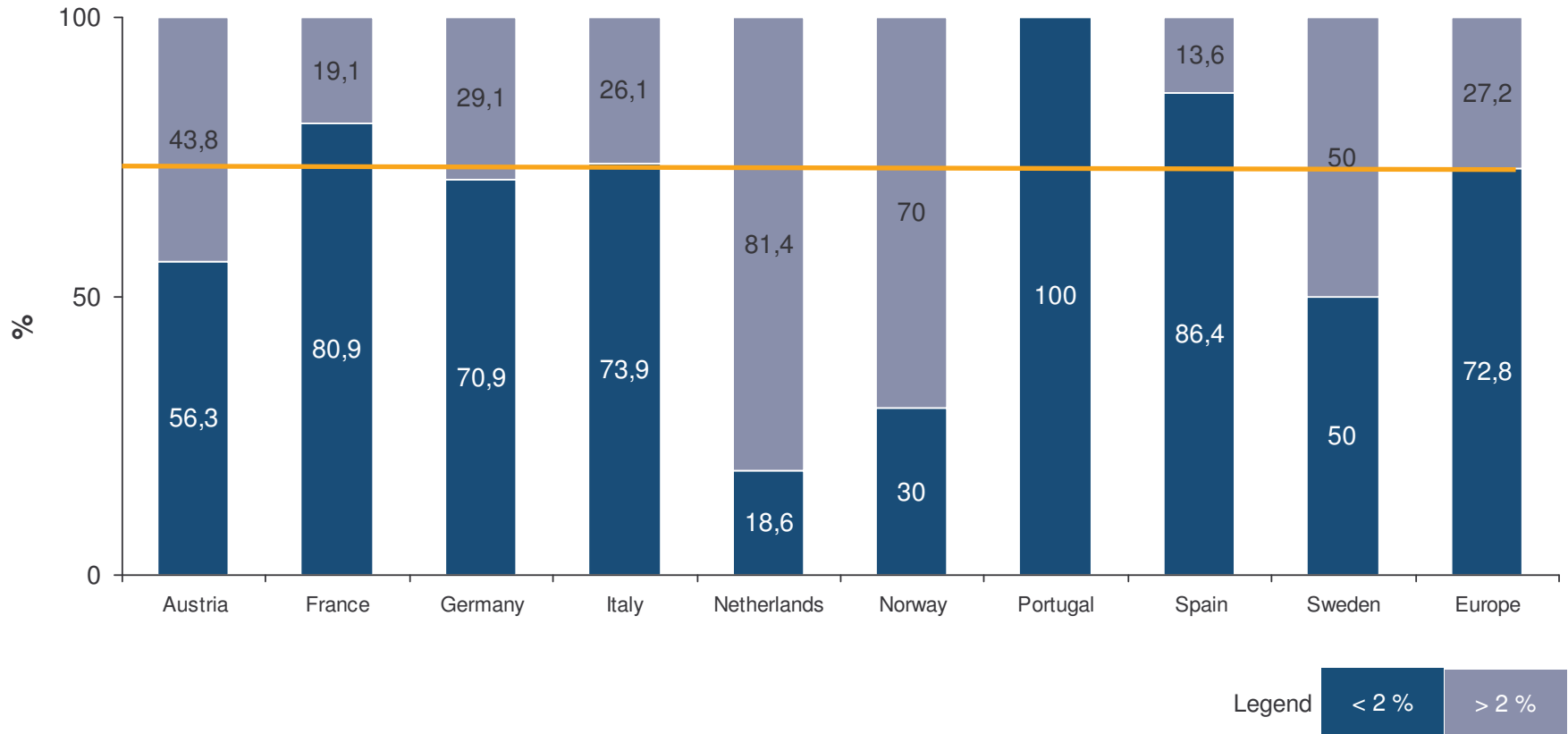- 2 - 2,5 %; 8,3
- < 1%; 26,0
- 1-1,5 %; 34,3
- 1,5 - 2 %; 12,5
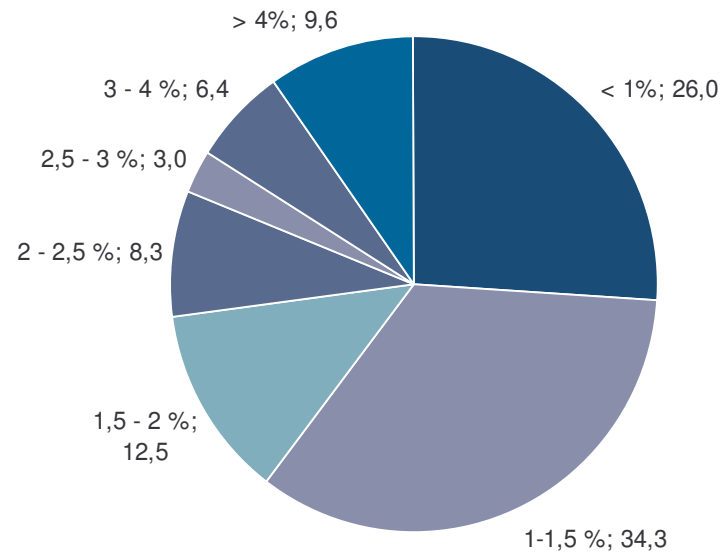
Source: Hine eHospital Census 2006

ICT spending 2006 – country data / aggregated data

IT department budget as part of he whole hospital budget

Country	< 2 %	> 2 %
Austria	56,3	43,8
France	80,9	19,1
Germany	70,9	29,1
Italy	73,9	26,1
Netherlands	18,6	81,4
Norway	30	70
Portugal	100	
Spain	86,4	13,6
Sweden	50	50
Europe	72,8	27,2

Legend < 2 %   > 2 %

Source: HINE eHospital Census 2006

Factors driving IT investments now / in the next three years

E hospital Census 2004	**Current situation 2004**	**Expectations for 2005/2007**
	■ **Meeting legal requirements**	■ **Meeting legal requirements**
	■ Reducing avoidable medical errors	■ Reducing avoidable medical errors
	■ Facilitate sharing of patient information	■ Facilitate sharing of patient information
	■ Comply with government funded policies	■ Increase clinical capacity and productivity
	■ Improve security and privacy provisions	■ Improve security and privacy provisions

E hospital Census 2006	**Current situation 2006**	**Expectations for 2007/2009**
	■ **Improve access to care and reduce waiting list**	■ **Improve access to care and reduce waiting list**
	■ **Enhance overall organisation performance**	■ **Enhance overall organisation performance**
	■ Support reorganisation and change	■ Support reorganisation and change
	■ Create more effective supply chain links	■ Create more effective supply chain links
	■ Improve overall quality of care	■ Improve security and privacy provisions

Source: HINE eHospital Census 2004 & 2006

Current & future integration

100

50

%

0

Current situation 2006

- Not fully integrated but externally connected; 19
- Fully integrated AND externally connected; 22
- Fully integrated; 32
- LAN based seperate systems; 13
- Stand alone computer systems; 12

Plan for next 5 years 2007 / 2011

- Not fully integrated but externally connected; 14
- Fully integrated AND externally connected; 39
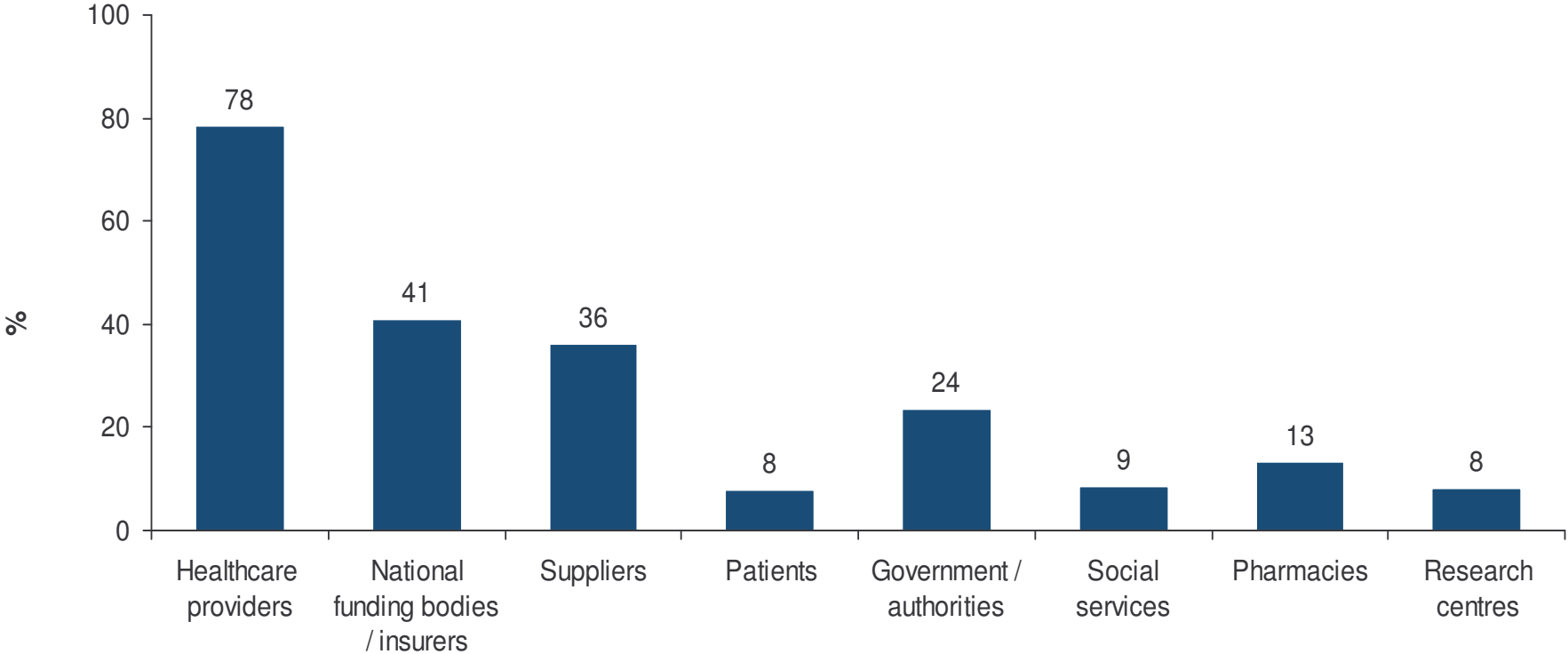- Fully integrated; 32
- LAN based seperate systems; 6
- Stand alone computer systems; 8

Source: eHospital Census 2006

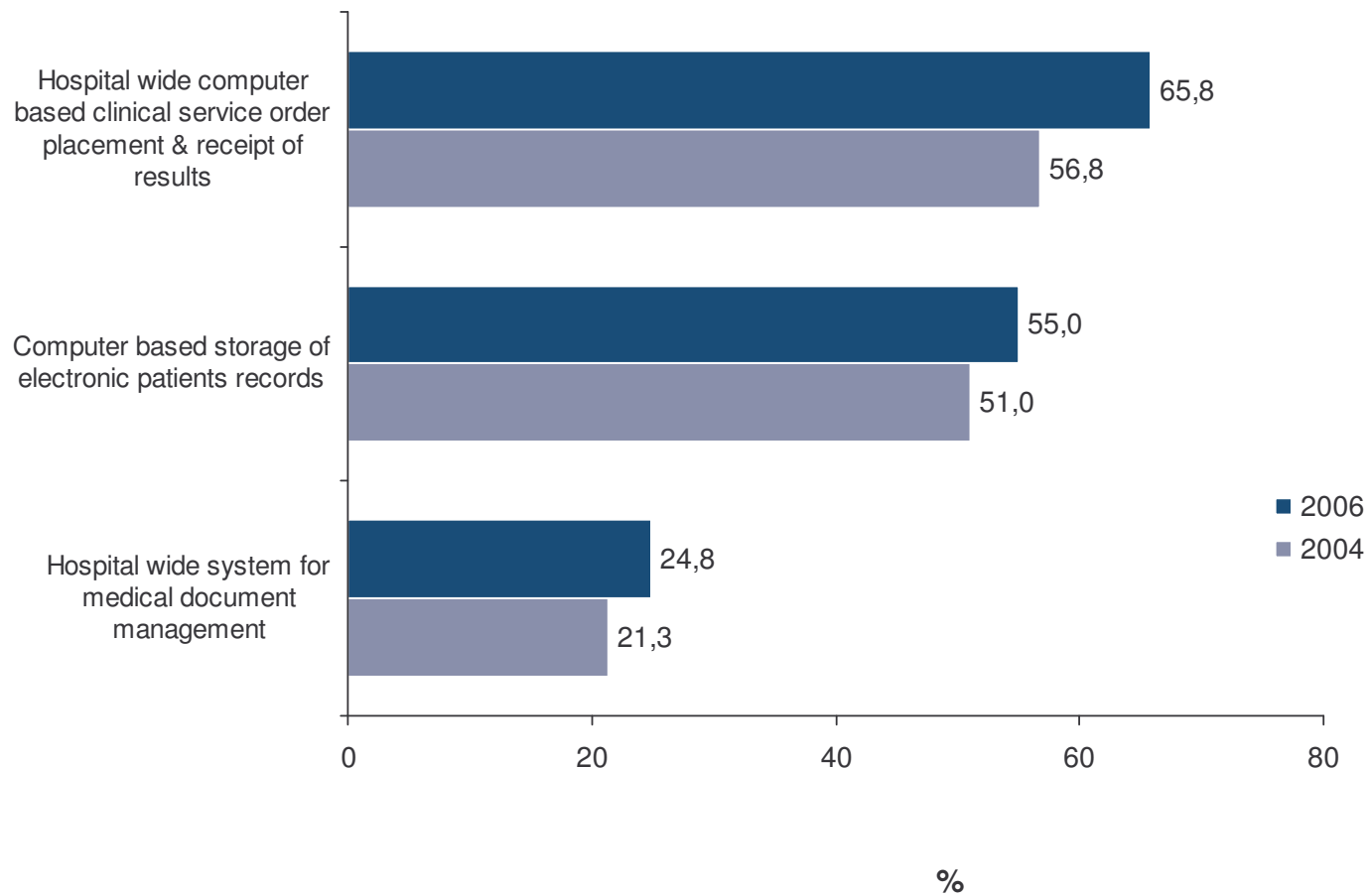# Integration – organisations targeted by external connection currently

Connected to organisations in the wider health care community 60,4 % of which

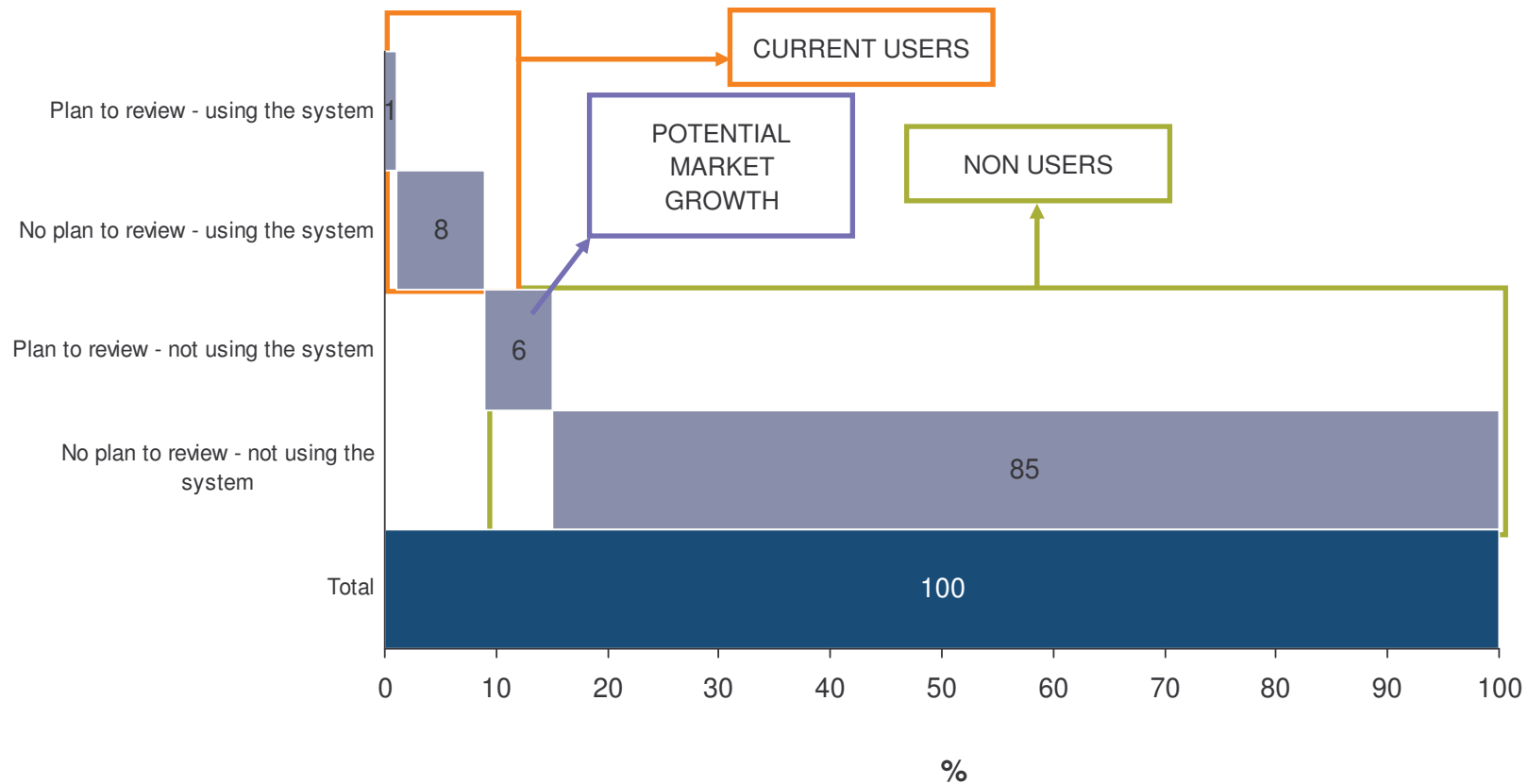# European Hospital EPR systems installed base 2004 - 2006

Functionalities of EPR

Hospital wide computer based clinical service order placement & receipt of results
- 65,8 (2006)
- 56,8 (2004)

Computer based storage of electronic patients records
- 55,0 (2006)
- 51,0 (2004)

Hospital wide system for medical document management
- 24,8 (2006)
- 21,3 (2004)

Legend: ■ 2006 ■ 2004

%

E Learning applications in European hospitals 2006

Current installations – plans for future

Plan to review - using the system 1

No plan to review - using the system 8

Plan to review - not using the system 6

No plan to review - not using the system 85

Total 100

CURRENT USERS

POTENTIAL MARKET GROWTH

NON USERS

%

Source: Hine eHospital Census 2006