EMR-EHR in Acute and Ambulatory Applications

March 2019 – Top Level Summary & Report Sample

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Global and Regional Trends

This is a top line overview taken from Signify Research’s market report “EMR/EHR in Acute and Ambulatory Application – World – 2019” published in March 2019.

Please contact alex.green@signifyresearch.net for further information on this report or if you would like a one-to-one presentation.
Key Drivers of & Barriers to Growth

- Macro healthcare trends (e.g. new hospitals, IT expenditure, hospital bed and PCP numbers).
- Penetration of EMR into healthcare systems and EMR market saturation
- Government funding and national eHealth initiatives
- Development of integrated care networks and impacts on market for different EMR solution types
- Regionalisation and changes in procurement models and type of EMR procured
- National EHR roll-outs
- EMR maturity and the impact this has on demand for clinical systems, financial modules and other advanced EMR modules
- Growth of additional services

Additional Information in Full Report

- Market by product (operational, clinical, interop, PHM, RCM) for 20 countries/subregions
- Market by vertical (Regional/network, ind. Hospital, Ambulatory only, long-term and national) for 20 countries and subregions. It also shows the market by private v public purchaser.
- Vendor revenue share estimates for 2018 in 20 countries/subregions.


CAGR – 4.4%

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<tr>
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<th>2018</th>
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<tr>
<td>Market Size</td>
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<td>EMEA Share</td>
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<td>Americas Share</td>
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Exact numbers provided by country in full report

Product Trends

- Operational/admin modules still the largest market
- Clinical modules take next largest share and growing faster than market average
- RCM modules, interoperability, PHM/wellness modules >20% of market
# EMR-EHR in Acute and Ambulatory Applications

## Drivers of Growth

<table>
<thead>
<tr>
<th>Driver</th>
<th>2018</th>
<th>2023</th>
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<tr>
<td><strong>Macro Health Trends</strong></td>
<td><img src="calendar-2018.png" alt="Calendar" /></td>
<td><img src="calendar-2023.png" alt="Calendar" /></td>
<td>Number of hospitals and/or PCPs is still increasing at a global level, driving up overall TAM. Trend more focused on developing regions. In some developed countries the reverse is true reducing TAM.</td>
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<td><strong>EMR Penetration</strong></td>
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<td><img src="calendar-2023.png" alt="Calendar" /></td>
<td>Still many hospitals and PCPs that are using paper-based systems. Increased penetration is a key driver of growth in developing and emerging economies and in some developed economies. Once saturation is hit, market growth can suddenly slow (e.g. US ambulatory market).</td>
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<td><strong>Government Funding</strong></td>
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<td>All EMR deployments globally have been the product of some level of government funding or initiative to encourage adoption. Initially funding may spur EMR uptake. It can then be used to encourage changes in how EMR is used (e.g. meaningful use, VBC). However, once funding is withdrawn it can hit market growth (e.g. Canada ambulatory).</td>
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<td><strong>National Projects</strong></td>
<td><img src="planet.png" alt="Planet" /></td>
<td><img src="world.png" alt="World" /></td>
<td>National projects can be headline grabbing and the number is gradually increasing. However, they are supplements to core systems and generally not major revenue generators. E.g. widespread deployment in Nordics but not a major revenue stream for leading Nordic EMR vendors.</td>
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</tbody>
</table>

### Information Provided in the Full Report

- Each of these drivers is examined in detail across more than 30 country profiles in the full report. [Click here for example of typical analysis.](#)
- Each profile examines which organisations are buying EMRs, and what type (network, regional, ambulatory only, long-term care).
- Each country profile also presents which vendors have won most of the contracts with these organisations.
- Each country profile presents the main drivers in that country for EMR procurement, including features required, projects driving integrated care, government funding, etc.
EMR-EHR in Acute and Ambulatory Applications

Drivers of Growth

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<tr>
<td>Regionalisation &amp; Development of Integrated Care Networks</td>
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<td>Procurement moving from individual health organisations to health networks, often on a regional basis and often integrating IT purchasing across different levels of health care. On one hand this could reduce vendor revenue per bed/PCP, due to volumes of scale. However, more often it increases it due to wider range of tools procured (e.g. care coordination, data integration, workflow, managed services, etc.), e.g. ACOs in US and sote-regions in Finland.</td>
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<td>EMR maturity</td>
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<td>Revenue per bed/PCP can be increased as the use and breadth of EMR offerings expands to include more departmental clinical systems, HIE, PHM, telehealth and financial tools. Change won't be dramatic over the forecast period, but gradual.</td>
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<td>Additional Services</td>
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<td>Software provision is just a part of the market. Much of the market is service-driven. The service market is forecast to grow faster than the software market as a greater breadth of services are provided by the EMR vendor, e.g. hosting, managed and/or outsourced IT, public cloud storage, implementation, etc.</td>
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- Each profile examines which organisations are buying EMRs, and what type (network, regional, ambulatory only, long-term care).
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EMR-EHR in Acute and Ambulatory Applications

There are very few truly global EMR vendors

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40 vendor profiles are provided in the full report which examine portfolio, provide a SWOT analysis, and discuss each vendors’ key challenges. An example is provided at end of this slide deck.

Top 20 Vendors

- Few of the top 20 vendors have a truly international business
- Most sell mainly to one market.
- Nearly all drive >85% of business from just one market
- Large size of US market distorts this to some extent.
- Only a few vendors buck the trend in the top 20 list.

Note full report provides all vendors’ names and shows their estimated revenue share in each of the countries/subregions listed.

- None/negligible share of vendor’s EMR revenues
- Vendor present, <85% of vendor’s EMR revenues
- More than 85% of vendor’s EMR revenues
EMR-EHR in Acute and Ambulatory Applications

There are very few truly global EMR vendors

Top 40 Vendors
- The trend persists in the vendors ranked 21-40. Although more exceptions.
  - The large US market is no longer such a factor in determining the trend.
  - Harris, Nexus, Dedalus, Cegedim, Indra, CGI and Orion are good examples of vendors with international businesses.
  - There is no true global EMR market, instead separate markets with their own vendor base, driven by their own market dynamics are the norm.

Note full report provides all vendors' names and shows their estimated revenue share in each of the countries/subregions listed.

40 vendor profiles are provided in the full report which examine portfolio, provide a SWOT analysis, and discuss each vendors' key challenges. An example is provided at end of this slide deck.
Major Drivers

- Market saturating in North America. Growth being driven by upselling additional PHM, RCM, mobile, clinical and hosting products and services
- Private hospital markets in Latin America, with many starting to focus on improving data integration and sharing

By Country

- US dominates the market in terms of size. However, market is approaching saturation in terms of core EHR in both acute and ambulatory markets.
- US growth driven by provider consolidation and vendors upselling supplemental products (clinical systems, PHM, RCM, services). Replacement market is key battle ground.
- Canadian acute and ambulatory markets very different in terms of vendors. US international vendors and Telus dominate acute. Telus and long list of local vendors dominate ambulatory.
- Latin America largely served by local vendors including MV, Philips/Tasy, Everis, Benner, Pixeon and some international vendors

Additional Information in Full Report

- Market size estimates and forecasts to 2023 for US, Canada, Brazil, Mexico and Rest of Latin America split by vertical, by product and public vs provider purchasers.
- Vendor revenue shares for top vendors in US, Canada and Brazil with further US vendor share splits for acute, ambulatory and long-term care markets.
- Country profiles for five countries in the region with details on purchasers, trends in EMR solution types required, major projects impacting EMR market.
Key Market Metrics

<table>
<thead>
<tr>
<th>Region</th>
<th>Market Metric</th>
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<tbody>
<tr>
<td>Western Europe</td>
<td>Approaching 90% of EMEA market</td>
</tr>
<tr>
<td>Eastern Europe</td>
<td>Growth considerably above EMEA average</td>
</tr>
</tbody>
</table>

Major Drivers

- Upgrades from PAS to clinical EMR solutions
- Regionalisation in several countries
- Integrated care agenda in several countries

CAGR 2018-2023 – 5.1%

By Country

- Unlike the other two major regions (Asia and Americas), there is no one country that dominates the market.
- DACH (Germany, Austria, Switzerland) is the largest market followed by the UK/Eire. With the exception of Cerner, the vendors supplying these two markets are largely different.
- France is the most fragmented market in terms of the supplier base.
- Regionalisation is a significant driver of growth in many markets (e.g. Finland, UK, Italy). The share taken by the regional/network vertical will grow faster than market average as a result.
- CAGR over the period 2018 to 2023 varies from a low of just over 2% in Benelux to a high of more than 7% in subregions outside Western Europe.

Additional Information in Full Report

- Market size estimates and forecasts to 2023 for DACH, Benelux, France, UK/Eire, Spain/Portugal, Italy, the Nordics, Rest of Western Europe, Eastern Europe, Middle East and Africa split by vertical, by product and public vs provider purchasers.
- Vendor revenue shares for top vendors in each of the above countries/regions.
- Country profiles for 22 countries in the region with details on purchasers, trends in EMR solution types required, major projects impacting EMR market.
Major Drivers
- Upgrades from PAS to clinical EMR solutions – Japan, Oceania, parts of Rest of Asia
- Integrated care agenda & regionalised contracts in several countries
- Green-field installations in developing regions, India and China

By Country
- Japan accounts for more than half of the Asian market. It is served largely by Japanese vendors that only sell solutions in Japan.
- Oceania and China are of comparable size. However, market dynamics and the supplier base in each country are very different.
- The public hospital market in China is dominated by local vendors and offers limited opportunities for international vendors. The private market presents some opportunities for international vendors, with some examples of successful implementations.
- Oceania presents a significant opportunity for international vendors, although it is a highly competitive market. Some regionalisation, but still a healthy individual/private hospital market.

Additional Information in Full Report
- Market size estimates and forecasts to 2023 for China, Japan, India, Oceania and Rest of Asia split by vertical, by product and public vs provider purchasers.
- Vendor revenue shares for top vendors in each of the above countries/regions.
- Country profiles for 8 countries in the region with details on purchasers, trends in EMR solution types required, major projects impacting EMR market.
Example Country/Sub-region Analysis

This is an example of the coverage in one region. A similar analysis to the data presented on this slide and that provided over the next few pages is replicated for the other 19 countries/sub-regions in the full report.
# Nordics

## Major Drivers
- Digital Health Strategy 2018-2022 in Denmark
- Integration of healthcare provision into “sote-areas” in Finland
- One patient one record initiative in Norway
- The National eHealth strategy in Sweden

## Market Size

<table>
<thead>
<tr>
<th>2018</th>
<th>~$400-450M</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operational/Admin Products</td>
<td>~55%</td>
</tr>
<tr>
<td>Clinical/Data Int./PHM/Wellness</td>
<td>~45%</td>
</tr>
<tr>
<td>CAGR (18-23)</td>
<td>~4-5%</td>
</tr>
</tbody>
</table>

*Exact numbers provided in full report*

Clinical, data integration, PHM/wellness broken out in full report

## Operational/Admin Products
- ~55%

## Clinical/Data Int./PHM/Wellness
- ~45%

## CAGR (18-23)
- ~4-5%

## CAGR (18-23)
- ~4-5%

## Key Trends

- **Regionalisation in Denmark.** Acute and ambulatory EMR procurement being centralised into five regions (social care remaining the remit of the 98 local authorities).
- Local vendor Systematic has won three regions (Central, North Jutland and South Region). Epic has won the other two (Zealand region and Central region), although implementation has had several issues.

- **Regionalisation in Finland.** Acute, ambulatory and social care EMR procurement being centralised into 19 sote-areas. No longer remit of the 192 local authorities and 21 districts.
- CGI Group (former Logica business) and Tieto are expected to be the vendors to win out in Finland. Epic has one contract to-date although rollout has been delayed.

- **Acute EMR purchasing is centralised across four regions in Norway.** Primary and social care procurement remains with the 428 municipalities. Major upgrade to test new “one-patient-one-record” initiative planned in one of the four regions - Helse Midt-Norge.
- Local vendor DIPS has three of the four regional contracts. Cerner the fourth - Helse Midt-Nordg. However, it is not bidding for the upgrade contract. Only Epic remains as a bidder for this new contract which will be allocated in 2019.
- Some grouping of purchasing at a regional level in Sweden, although no central regionalisation project. Most primary care EMR purchased by 290 municipalities and acute with 21 councils.
- Tieto is market leader in Sweden. Followed by Cambio, Evry and CGM. Cerner has won some large regional contracts in 2018.
Introduction

This section briefly describes the Nordic region, and the main characteristics of its healthcare systems. It also introduces the main themes covered in the report.

The Nordic region is comprised of the five countries: Denmark, Finland, Iceland, Norway, and Sweden. These countries share a number of similarities, including a high level of education, a strong emphasis on social welfare, and a universal healthcare system. However, there are also some differences in the organization of healthcare, the role of the government, and the degree of marketization.

The Nordic countries are known for their high levels of healthcare expenditure and access to healthcare services. The region has a reputation for innovative healthcare solutions and a focus on improving health outcomes.

The report focuses on the current state of EHR in the Nordic region, discussing the challenges and opportunities for improving EHR systems in the region.

Current EHR Market Status

The market for EHR solutions in the Nordic region is characterized by a high level of competition and innovation. The region is home to several leading EHR vendors, including some of the largest players in the global market.

Denmark

EMR/EHR Developments in the Nordics - White Paper

Denmark is a country with a well-developed healthcare system, and it has made significant investments in EHR technology. Denmark has a central EHR system called "E-Clinic", which is used primarily by hospitals.

The E-Clinic system is used for electronic patient records, and it includes information on medical history, treatment plans, and test results. The system is designed to improve the efficiency and quality of care by providing healthcare professionals with easy access to patient data.

The E-Clinic system is also used by pharmacies, which can access patient information to provide more personalized care. The system also includes a mobile app that allows patients to access their medical records on-the-go.

Future Developments

EMR/EHR Developments in the Nordics - White Paper

In 2019, the Danish government announced a plan to further develop the E-Clinic system, with a focus on improving the integration of different healthcare providers and reducing the administrative burden for healthcare professionals.

The plan includes investments in new technology and the development of new EHR solutions. The government also aims to increase the use of digital health tools to improve patient care.

Conclusion

EMR/EHR Developments in the Nordics - White Paper

In conclusion, the Nordic region is a leader in healthcare innovation, and the EHR market in Denmark is a prime example of this. The E-Clinic system is a comprehensive solution that meets the needs of healthcare providers and patients.

The Nordic countries are committed to improving the quality of care and reducing healthcare costs. The EHR market in Denmark is a testament to this commitment, and it is expected to continue to evolve and improve in the future.
platforms before other inputs. This prevents stakeholders from demanding that management solutions that address issues such as aging infrastructure and poor content quality are implemented. Local authorities can care about digital issues, but they do not want to become involved in the technical aspects of the platform.

Trustworthy and secure data. This initiative focuses on aligning the patient’s appointment information with shared data across the healthcare sector.

Progress and common building blocks. The focus is to ensure that it is future-proof and response for cross-border healthcare transport (linked by common standards).

Recent Contracts/ Vendor Activity

As of providing this contract (for the South and Capital region in 2016) the Nordics had 10 contracts across the different regions and countries. The Southern and Eastern region is the new contract in 2018. The South region contract was awarded in May 2018.

Finland

Current EHR Market Snapshot

EHR systems are used in all healthcare settings, although the determined nature of the country’s EHR market has been reduced to a small range of EHR solutions being used by different providers with some iterations on the market. Most of the EHR solutions data is from 2018 and covers the Finnish market, which has been implemented by the Ministry of Health and Social Services in collaboration with the Finnish National Institute for Health and Welfare (THL). The market is characterized by a small number of EHR solutions available, with only a few providers holding a significant share of the Finnish market.

As of 2016, the Nordics solutions were used by the local hospitals and other care providers. Finland also has a national EHR system. In 2012, the government opted for the solution that by the end of 2017 should be a national, interoperable EHR in place.

Organisation and Pricing of EHR Solutions - Finland

There is no one-size-fits-all model. In Finland, each local health care organization is responsible for acquiring, implementing, and managing the EHR system. The Ambulatory EHR software is provided, whereas the EHR software for inpatient care is self-developed. Ambulatory EHR systems are often based on open source software, and there are few standards for data exchange between systems.

By the end of 2017, there is no one comprehensive solution that is implemented across the entire country.

Future Developments

In 2016, the government published its social welfare and health care reform proposal. This included proposals to establish and implement a nationwide EHR system. The EHR systems are being developed and implemented in a national project called "Health and Welfare". The development is divided into different phases and is expected to be completed by 2019.

The Finnish Medical Journal reported that the new EHR system is critical for improving the efficiency, effectiveness, and interoperability of the healthcare system, and it is expected to be a major step forward in Finland's healthcare reform.

Norway

Current EHR Market Status

The Director of Health services in Norway has implemented an electronic health record system (EHR) for the entire Norwegian health service. The system is called "Healocare" and is used by all Norwegian healthcare providers, including primary care, hospitals, and nursing homes.

The system has been implemented in all regions of Norway and is expected to be fully operational by the end of 2018. The system is designed to improve the efficiency and quality of healthcare by providing healthcare professionals with access to comprehensive patient records.

The four regional authorities have jointly purchased their own EHR solutions. While aligning system requirements, local authorities have chosen different EHR solutions based on the needs of their region. The government decided that each region has a free choice, and the implementation of the EHR systems is not mandated by the national government.

The EHR systems in Norway are expected to be fully operational by the end of 2019, and the national system will be integrated with the EU-wide EHR system.
The Nordic region has been identified as a testbed for the one-patient-one-report model. Digital health, also known as the Nordic Region, is a hub for digital health innovation and a major goal of this project was to provide integrated healthcare records across all providers, hospitals, and patients in all county council regions. In addition to MibiTechs, there are four other major DSS vendors that have a significant market share in Sweden. MibiTechs is a part of Aim4Future, the leading Nordic DSS vendor. MibiTechs has developed a platform that has been used commercially by other sources.

Nordics

The white paper presented in this section is an extract from the full report. Similar country analyses are provided in the full report for the following countries:

- Belgium
- The Netherlands
- Luxembourg
- Germany
- Austria
- Switzerland
- Denmark
- Finland
- Norway
- Sweden
- UK
- Ireland
- Spain
- Portugal
- Italy
- France
- Greece
- Poland
- Russia
- The Baltics
- Saudi Arabia
- UAE
- Israel
- New Zealand
- Japan
- China
- India
- Singapore
- South Korea
- Brazil
- Mexico
- Rest of Latin America
- The US
- Canada
- Rest of Americas

The Nordic market estimates, forecasts and vendor revenue shares are presented for a sub-set of these countries, namely:

- EMEA
  - Benelux
  - DACH
  - France
  - Italy
  - The Nordics
  - Spain/Portugal
  - UK/Eire
  - Rest of Western Europe
- Asia
  - China
  - India
  - Japan
- Oceania
- Rest of Asia

The market estimates, forecasts and vendor revenue shares are presented for a sub-set of these countries, namely:

- Americas
  - Brazil
  - Mexico
  - US
  - Rest of Americas
Vendor profiles are provided in the full report for 41 vendors. These include:

- Agfa Healthcare
- Allscripts, Inc.
- Athenahealth
- Cambio Healthcare Systems
- Cegedim
- Cerner
- ChipSoft
- Comarch Healthcare
- Compugroup Medical
- CPSI
- Dedalus
- DIPS
- DXC Technology
eClinicalWorks
- Engineering
- Epic
- Everis
- Evry
- Fujitsu
- Greenway Health
- Harris Healthcare
- InterSystems
- Maincare Solutions
- Medhost
- MEDITECH
- MV Sistemas
- NEC
- Neusoft
- NextGen Health
- Nexus
- Philips Tasy
- Ruisoft
- Santer Replay
- Servelec Group
- Senynt
- SystemC
- Telstra
- Telus
- Tieto
- Winning Health Technology Group

Click here to download this example profile as a PDF document.
Conclusions
Conclusions

There is no single global EMR market. With a few exceptions, there are largely individual local markets that are typically driven by local issues and served by local vendors.

Total market value and forecast growth are hugely influenced by the US market. The US market has reached saturation in terms of EMR penetration into healthcare organisations, with growth falling to rates significantly below those seen during the last decade. This will reduce global growth rates too.

Few vendors have had success in breaking into new geographic markets. Exceptions are InterSystems, CGM, Cerner and DXC. Most others have nearly all (>85%) their business in one or two markets. Acquisition of a local vendor is often a precursor to success when entering new geographic markets. Organic entry into a new market is often a difficult process with few examples of success.

Most geographic markets are quite different to the US, and far from saturated. EMR solutions replacing paper systems will still drive a substantial proportion of market growth.

Growth is also being driven by revenue per bed/PCP being increased as EMR vendors integrate more functionality (e.g. PHM, HIE, telehealth, RCM, clinical systems) into EMRs.

In many developed countries the number of EMR customers is reducing and the value of contracts increasing owing to regionalisation and integrated care initiatives. Local legacy vendors may struggle to scale to meet requirements. At the same time a proven track record in a given country can offer a significant advantage.

“With more than 700 vendors supplying solutions, and with nearly all vendors driving the overwhelming majority of their revenues from one country, the global EMR market would appear very fragmented in terms of supply. However, the dominance of the US & Japanese markets, where there are established and entrenched suppliers, results in the top 10 vendors commanding 62% of world revenues. On that basis quite a consolidated market in terms of supply. These two facts capture the dynamics of the global EMR market well. The large US market skews many of the global trends. However, the US is a saturated market with vendors battling to take share in order to grow. Geographic expansion offers an alternative. However, it’s one with many pitfalls and vendors need to understand the nuances of local markets if they are to succeed.”
Related Insights
Key Insights on the global EMR market

EHR Vendor Opportunities for Growth

September 27th, 2018 – As the US EHR market in its traditional forms starts to mature, what are the strategies US EHR vendors are employing to ensure that the growth rates seen over recent years continue?

HIMSS 2019 Post Show Report

21st February 2019 – This show report presents the views from Signify Research’s analyst team attending this year’s HIMSS 2019 Show in Orlando, Florida.

Innovation to Address Physician Burnout

21st February 2019 – Long-winded data entry procedures and IT that gets in the way of the clinician-patient relationship have contributed to EHRs being viewed by clinicians with resentment. This year’s HIMSS saw several announcements that will start to address this.
Scope & Definitions
EMR-EHR in Acute and Ambulatory Applications

Scope

Click here for Report Brochure with full Table of Contents.

Click here to request the blank tables from the report and a sample of the 300 page report pdf.

Report Content

The market is broken out by product:
- Admin/Operational Systems
- Clinical Systems
- Financial Modules
- Wellness/PHM Modules
- Interoperability/Data Exchange

The market in each country is broken out by vertical into:
- National EHR
- Regional/Network EMR
- Individual Hospital
- Ambulatory Only
- Long-term Care

At a regional level each product is also segmented by:
- Acute/Inpatient Care
- Hospital > 500 Beds
- Hospital 100-500 Beds
- Hospital <100 Beds
- Ambulatory Care
- 10+ Physician Group Practices
- 5-10 Physician Group Practices
- 1-5 Physician Group Practices

Vendor revenue share is provided by region and country.

Below are the definitions of which sub-products will be included in each of the product segments:

Admin/Operational
- Health Information
- Access Manager
- Managed Tech Deployment
- Performance Management/Reporting
- Patient Scheduling
- ePrescribing
- Appointment Reminders
- Bed Management
- Referral Management

Clinical Systems
- Emergency Care
- Chronic Care
- Surgical Care
- Intensive Care
- Mobile Care
- Oncology
- Pharma IS
- Rehab
- Diagnostic Imaging/RIS
- Anesthesia
- Lab IS
- Women’s Health
- Behavioral Health

Interoperability/Data Exchange
- HIS
- Interoperability
- Data Aggregation
- Longitudinal Record

Financial Modules
- RCM
- Billing & Claims Management
- Medicare Eligibility

Wellness/PHM Modules
- Patient Portal
- Telehealth
- Remote Monitoring
- Care Management
- Care Coordination
- Risk Stratification
- Analytics
- Registries
A different approach to HealthTech market intelligence

Reliable market data you can trust, insightful analysis and exceptional Analyst support. A world-class team of Analysts delivering the market intelligence you need, when you need it.