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The State of Health IT in Iberia

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In years past, much of the focus on European markets concentrated on the arger economies of Germany, the UK, France, and Italy. There is relatively little knowledge of the healthcare IT markets in other Eurozone countries, particularly among US vendors looking to expand into continental Europe.

This executive brief will focus on the countries of Spain and Portugal. Unlike Germany and the Netherlands who share relatively little in terms of vendor mix, Spain and Portugal share many market characteristics. For this reason they will be discussed jointly in this brief.

Setting the Stage: The Current Public System

Over the course of the 1980s and into the early 1990s Spanish government health responsibilities were transferred from the state to regional health authorities. The healthcare landscape in Portugal also underwent a similar shift. This has enabled Spanish and Portuguese hospitals to make largely independent decisions with regards to healthcare IT infrastructure and other solutions.

In the early 2000s, Spanish regions began a push for implementing newer technologies such as electronic scheduling and e-prescribing. This development drew interest from a wide swath of HIS vendors, including those from the US and from across Europe. Since those early initiatives hospitals in both Spain and Portugal have conducted programmes which were meant to incorporate more advanced clinical functionalities. While these developments have not been experienced uniformly across all health regions, they have resulted in an HIS landscape which is varied in terms of vendor mix and technology. A Look at the Vendor Mix The HIS mix in Spain and Portugal represents a hodge-podge of vendors.

HP, Indra, and Siemens have deep functionality, but also represent rapidly ageing product lines. Hospitals which use these solutions are approaching a decision point about whether they continue to maintain and build on these solutions or evaluate new products for a potential migration.

While other healthcare markets such as the US, Germany, and the Netherlands are obviously trending towards more integrated solutions and platforms, Spain and Portugal have proved surprisingly friendly towards best-of-breed offerings. This openness to has led to the emergence of a market with a wide cross-section of vendors and technologies.

A Quick Look at the Vendors

The HIS mix in Spain and Portugal represents a hodge-podge of vendors:

- Alert – One of the newest vendors to enter the space. Excellent UI but limited clinical depth and untested ability to deliver on enterprise scale;
- Cerner – Immense success in the US with some international momentum. Growing clinical capability. Sizable price tag;
- HP – HIS market share leader in Spain. Good clinical depth. HP no longer exists as a healthcare IT vendor in the US;
- Indra – Spanish multinational with the second largest HIS presence in Spain. A strong vendor with crossindustry experience;
- SAP – Long history in Europe with healthcare IT solutions. Often collaborates with Siemens in multiple industries; and
- Siemens – Offers multiple HIS products, some of which are functionally rich. At a crossroads in offering a next-gen solution.

Market Outlook

The double setback of the global recession and ongoing Eurozone credit worries have caused a lot of hospital IT projects to be put on hold, though many have not yet been completely cancelled. Limited budgets and austerity measures will make new health IT projects tough to justify, though it is clear that Spain and Portugal plan to maintain a high levels of healthcare services to their citizenry.

The market gap which has yet to be truly served is the functionally-rich, subscription- based, remote-hosted clinical platform which lowers upfront costs as well as overall IT burden and spend. The vendor who can deliver that and scale to demand will have a leg up in Iberia.

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