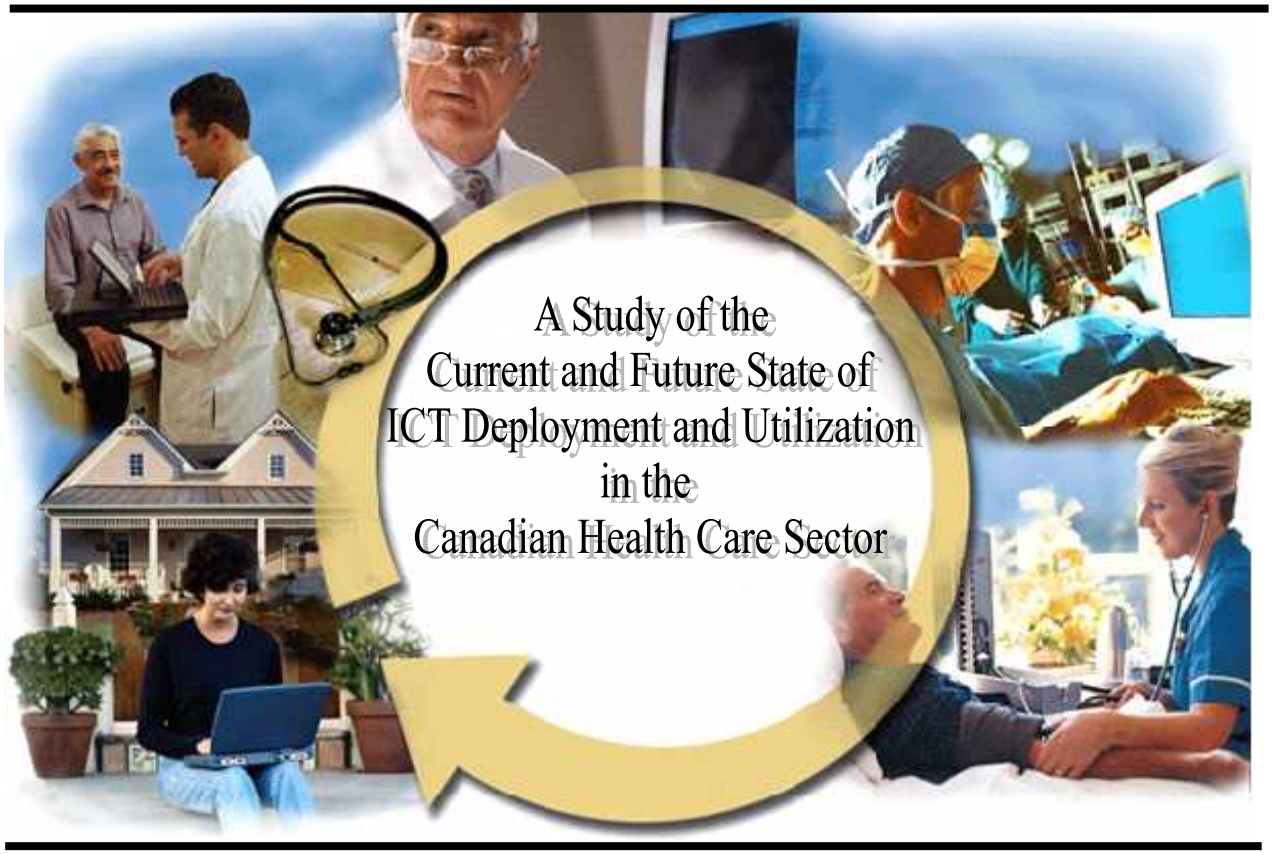

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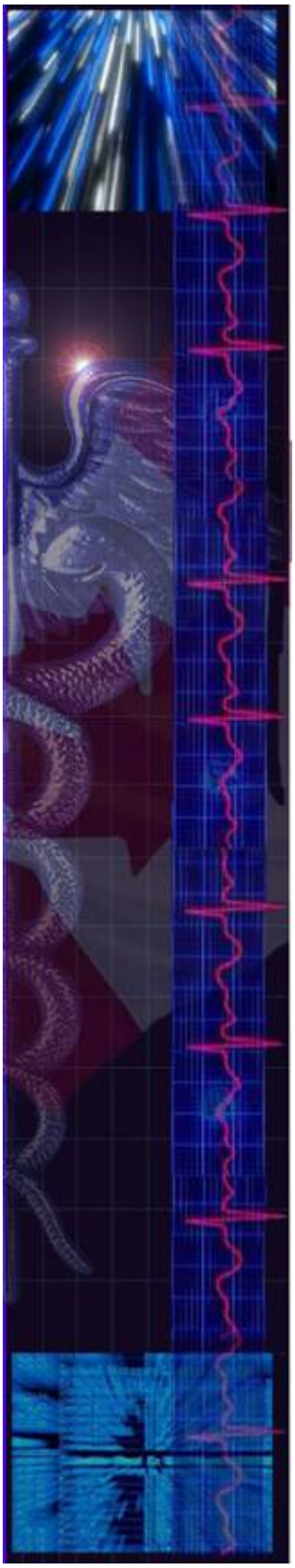


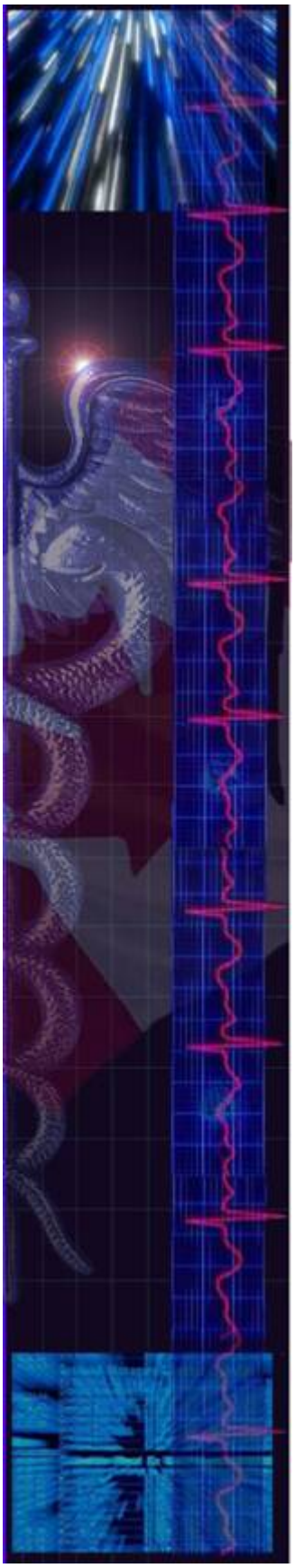
OVERVIEW

The Wall Street Journal describes healthcare as the *"last frontier for many software and hardware makers at a time when the information technology industry is seeing a slowdown in many of its traditional markets".* Unfortunately, for vendors and policy makers seeking to explore this frontier in Canada, there is little data available on current and planned investments in healthcare-related Information and Communications Technology (ICT). To fill this gap and to identify near and long-term trends about which vendors and policy makers alike should be aware, Branham conducted a study on the current state of eHealth deployment in Canadian hospitals.

The Branham study provides ICT vendors and healthcare policy-makers with the information needed to understand current Canadian eHealth priorities and offers insight into the ICT major spending patterns for Canadian hospitals, delving beneath the often quoted "percent of operating budget spent on ICT" figures to identify broad spending patterns. The study report contains:

- Description of the provincial healthcare organizations driving eHealth decisions, with a particular emphasis on provincial eHealth agencies and regional health authorities.
- Identification and categorization of the ICT infrastructure currently in place in Canadian hospitals including an assessment of vendor market share.
- Identification and categorization near-term ICT spending plans for Canadian hospitals.
- Description of key trends that will impact how Canadian hospitals acquire and deploy ICT.
- Healthcare providers' views on whether the services supported by the current eHealth infrastructure align with their needs.
- Identification and description of the critical success factors associated with eHealth implementations.

This first edition of the Branham study captured an overall picture of the general state of eHealth in Canada including an assessment of vendor market share. Subsequent editions of the study will refine this picture and focus on specific eHealth applications such as clinical decision support tools, electronic health records, and executive decision support tools.



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Executive Summary

1. Introduction

2. Approach

3. Canadian Healthcare Market

1. Introduction

The Branham study was designed to provide ICT vendors and healthcare policy-makers with the information needed to understand current Canadian eHealth priorities with a specific focus on how these priorities will impact Canadian hospitals. Since the context in which spending decisions are made is critical to understanding spending priorities, Branham focused on two broad categories:

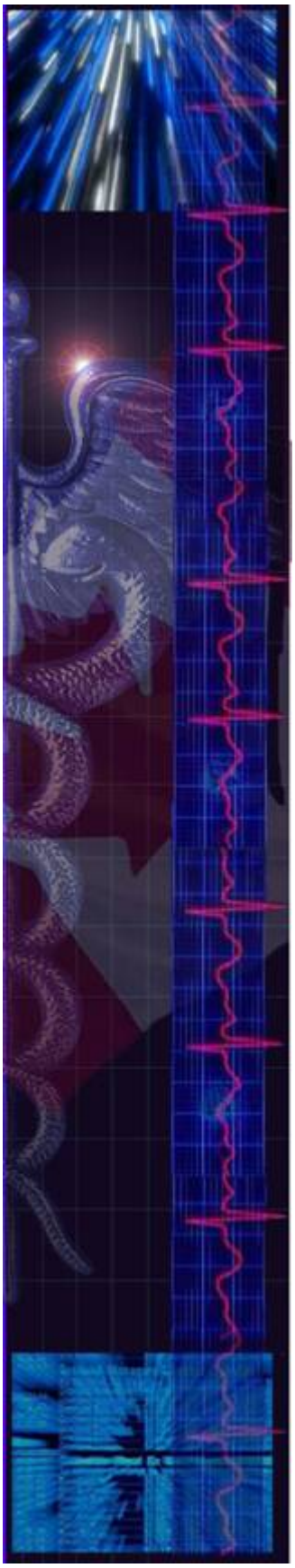
- **Investments.** Includes investments made to date as well as current spending plans.
- **Environment.** The factors influencing how eHealth priorities are set.

2. Approach

To compile as comprehensive overview of the current state of eHealth in Canada as possible, Branham used multiple methods for gathering information, including surveys, interviews and literature review. The information gathered using these multiple methods was synthesized to compile a composite picture of both the environment influencing eHealth decisions and the eHealth investments, both current and planned, made by hospitals and regional health authorities. This chapter describes each of the information gathering methods.

3. Canadian Healthcare Market

This chapter describes the environment in which eHealth decisions are made including an overview of who is making these decisions, who is selling eHealth solutions in Canada and the trends impacting both buyers and sellers.



3.1. Canadian Healthcare System Overview

This section provides a high-level regionalization overview. For each province, a summary of the following information is presented:

- Division of responsibility for healthcare service delivery responsibilities between the regional health authorities and the province.
- Map of regional geographic boundaries and a timeline of major regionalization milestones.
- A list of all hospitals delivering acute care, chronic care or rehabilitative care.
- A brief description of any provincial organizations specifically created to develop and/or implement a provincial eHealth strategy.

3.2. Vendors

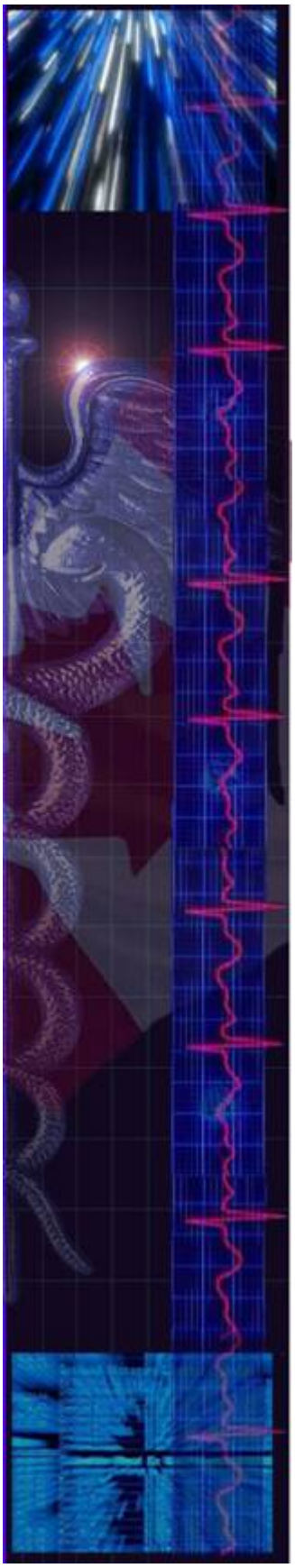
This section offers a list of those vendors who are selling eHealth solutions to Canadian hospitals and regional authorities along with an indication as to which of these vendors has been successful to date in doing so.

3.3. Trends

The Canadian eHealth market is undergoing substantial change, some aspects of which is common to what is happening in other jurisdictions while other aspects are unique to the Canadian market. This section explores these trends and offers insights on they may impact both vendors and policymakers.

4. Current Situation

This chapter explores the current state of eHealth in Canada by examining the current state of eHealth on a province by province basis. This approach takes into consideration the eHealth strategy for each province and, in so doing, provides the context in which to assess the eHealth initiatives in each province. Both current and planned eHealth initiatives are identified.



5. Future Possibilities

While the previous chapter considers planned eHealth initiatives, this chapter explores future possibilities for which vendors and policy makers alike must be prepared, describes what may impede progress towards making these possibilities a reality and offers insight into the critical success factors for making the most of today's eHealth investments.

5.1. Future Vision

This section offers a glimpse into the future through the eyes of Canadian eHealth leaders. While not yet an integral part of most strategic planning documents, these predictions offer important insights into where the Canadian eHealth market is heading.

5.2. Challenges, Issues and Impediments

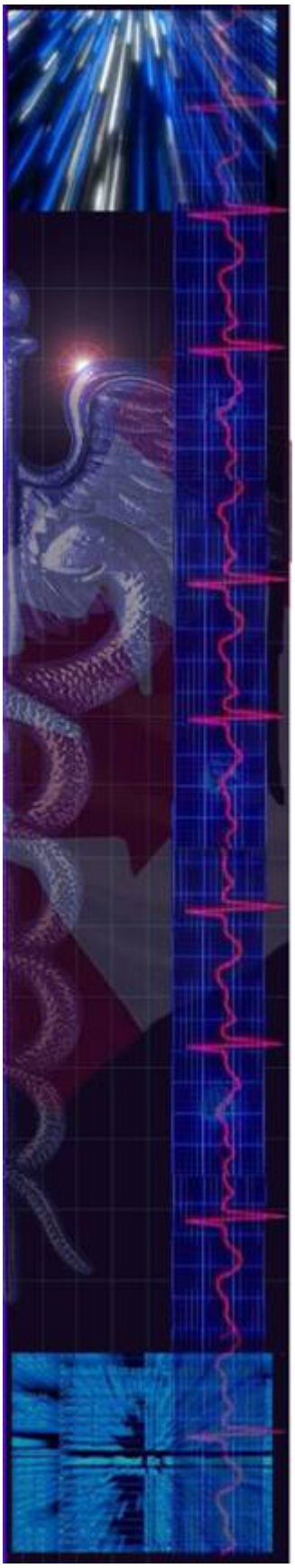
There are many reasons why the predictions of Canadian eHealth leaders may not occur. This section explores the many issues faced by the Canadian healthcare organizations as they seek to realize the many benefits that eHealth has to offer.

5.3. Critical Success Factors

This section explores research on critical success factors for IT implementation across multiple industries, including healthcare, and compares the results of this research with the experience of healthcare institutions across Canada.

6. Healthcare Providers' Perspective

Given the importance of clinician input to the success of eHealth projects, Branham surveyed nurses and physicians to get their input on the benefits of eHealth and the extent which clinicians are engaged in developing eHealth strategy in their organization. This chapter discusses what these healthcare providers had to say.



7. Summary and Conclusions

This final chapter offers insight into current Canadian eHealth priorities, overall market size, near-term opportunities and long-term threats.