

The European e-health Area & Canada

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Overview of Problems and Opportunities for Canada in Europe

- EU has prioritized e-health and is planning to undertake a multi-year commitment and plan to create the European e-Health Area
- Canadian e-health companies should know about these opportunities as they represent country-specific and EU-wide opportunities
- Canada offers unique expertise and insights in the use of e-health technologies and services
- This briefing summarizes the proposed policy agenda to be led by the various EU presidencies over the next two years, with the submission of national e-health roadmaps during the UK presidency of the EU
- The next two pages are essentially worksheets for Canadian industry to assess their capabilities against likely opportunities or solve known or emergent problems for e-health in Europe.



Problems facing e-health in Europe

Issue	Canadian Response
Lack of leadership commitment to address regulation & financial priorities (public sector provision of health services seen as slowing down progress)	
Slow uptake of e-health innovations by health systems	
Problems in interoperability and standards	
User ‘unfriendly’ systems (design, interfaces, functionality)	
Lack of e-health regulation and no clear reimbursement system	
Liability in e-health (impact of Electronic Commerce Directive on health) & consumer confidence	
Lack of understanding of how a ‘federal’ health system might work	
Unclear direction on patient mobility	
Development of EU-level reference centres (expertise clusters)	
Lack of public/user engagement to improve usability in e-health	
“digital social exclusion” (e-inclusion)	
Lack of consensus on way forward: Commission vs Council initiative	



Opportunities where Canada may respond from strength

Area	Activity	Canadian Response
Knowledge	Multi-lingual, multi-cultural environment, regulation	
Connectivity	Health information networks, standards	
IT Infrastructure	Electronic health records, management of information, services	
Service Delivery	Telehealth services, new media, payment systems, administration	
Technology	Device innovation, design, production, implementation, use, patient-centred approaches	
Access/Information	Health portals, new media, content	
Scale	SME focus, industry integrators, access to capital	



The EU's health agenda

- “high level of human health protection shall be ensured in the definition and implementation of all Community policies and actions” (Article 152)
 - Aging, occupational health, health and the market, Lisbon process
- informed patient: “being informed” for decision-making and mobility, exercise of rights
- e-health: information, communication, services
- pharmaceuticals: product and research priorities
- cross-border health
 - quality and standards
 - reliable information
 - consumer protection
 - reimbursement and pricing
 - portability of benefits
 - professional development
- regulatory and other barriers which conflict with realising these objectives



EU e-health policy objectives

- Implement Lisbon 2010 in health using e-health
 - improve productivity of the health services sector
- Measure impact of e-health
 - access, quality, service development
- Make e-health commonplace
 - adequately resourced in national health budgets
 - contributes to wider economic and social objectives
 - accepted by consumers and health professionals



Technology priorities of the EU

- develop e-health and medical technologies
 - home care, smart homes
 - sensors and actuators
 - smart and wearable biosensor technology (intelligent clothing and textiles)
 - implants that interact and communicate with other systems
 - real-time monitoring of health status
 - database and data mining
- develop ICT systems
 - health knowledge management
 - interoperability of health information sources, clinical guidelines
 - decision support, risk analysis, evidence based medicine
- develop gene and biotechnologies
 - pharmacogenomics, gene therapy, gene diagnostics, stem cells
- develop new knowledge
 - medical informatics, bioinformatics and neuroinformatics that enable disease prevention
 - therapy and tools enabling the individualisation of diagnoses and treatment,



Market metrics

- €500 million EC funding since early 1990s
 - matching funding for total investment of €1 billion
- €11 billion EU estimate of e-health industry
- seen as growing to 5% of total health spend across EU by 2010
- but ...
 - While internet connectivity of doctors is high (78% of GPs), provision of services is low (12%), with most services largely administrative (46%)
- health sector employs 9.3% of total EU workforce

Source: European Commission



E-health timetable

- May 2000: EU health strategy
 - integrate all EU health-related policies
 - focus on areas where there is clear EU added value
- 2002: e-health becomes an e-Europe 2005 policy priority
 - implement Health smart card
 - develop Health Information Networks
 - put health services online
- April 2004: health action plan
 - role of new technologies and new ways of delivering health services
 - improve access, quality, effectiveness of care
 - better integrate e-health policies and activities



E-health timetable

■ 2005

- member states to develop national e-health roadmap including progress on use of electronic health record, and reimbursement for services
- EU public health portal running offering 1-stop access to health info
- EC report on e-health best practice
- improved early warning, detection, surveillance of health threats through ICT
- plan for disseminating best practice and supporting actions within the e-health area
- agreement on approach to benchmarking impact of e-health
- completion of e-health assessment for UN World Summit on Information Society, Tunis

■ 2006

- develop interoperability & progress on common standards
- common approach to patient identifiers (smart card, identity management)
- inter-health systems communications
- collaborative approach to supporting and boosting investment in e-health

■ 2007: accreditation scheme for best practices



E-health timetable

- By 2008: health networks
 - fixed and wireless broadband, Grid technologies to deliver health services
 - teleconsultations (2nd opinion), e-prescribing, e-referrals, telemonitoring, telecare
 - full use of health smart card
- By 2009: law and regulation
 - legal framework for e-health certainty for e-health goods and services
 - EU e-health qualifications in clinical and administrative settings
 - workplace e-health
 - clarification of rules on payment for e-health services
- 2004-2010: 2-yearly study of the state of the art of e-health development in the EU
- 2004-2008: special events to disseminate best practice



Dutch Presidency priorities

- *New Commission takes office 1 Nov*
- *EP essentially out of action following elections until late summer following the elections*

- Modernising the social policy agenda
 - quality and sustainability of healthcare
- Reduction of regulatory and legislative burden
- Adoption of the Services Directive
 - impact of ECJ rulings on health systems
- Link between health and other policy areas, such as agriculture and environment
 - health and the internal market, cross-border professional mobility
 - patient mobility
 - international health regulations
- Shaping the EU Health Community, September
 - Presidency-sponsored stakeholder conference on health & health ministers convene
 - e-health
 - cross-border care
- Health Care in an Ageing Society, September
 - explore balance between market and health
 - are the internal market rules are compatible with subsidiarity, taking account of impact on health system organisation and funding



Luxembourg Presidency priorities

- continue theme of cutting red-tape and improving economic performance (Ambas. Tom de Bruijn commenting on likely hand-off to Lux.)
- Conference on Rare Diseases, launch of rare diseases health indicators and new strategy (EU Task Force on Rare Diseases)



UK Presidency priorities

- items coming to fruition
 - e-health roadmap timetables
- possible areas
 - “administration of cross-border health” (Boyd)
 - build closer links amongst health ministries (3rd Report, Health Select Cttee, May 2004)
- likely areas
 - continue the theme of economic and regulatory reform (FCO)
 - HIV/Aids strategy (Gareth Thomas International Development)
 - MRHA will be hosting a regulatory conference
 - climate change
- UK will also chair G8
- UN World Summit on Information Society (November)



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Tremblay Consulting

With over 20 years of international health experience (including Spain, Malta, France, Netherlands, Hungary, the UK and his native Canada), Mike established Tremblay Consulting in 1997. His clientele include governments, health providers, payers, pharmaceutical, medical device and information technology companies, retailers, and professional organisations.

The consultancy focuses on enabling more effective policy and business strategy through:

- policy development at the leading edge
- improving the focus and effectiveness of business strategies
- understanding the impact of health policy and regulated health markets.

Helping clients respond and manage strategy and policy under these circumstances is achieved through:

- development of policy entrepreneurialism
- policy leadership
- building organisational capacity.

More on the work of Tremblay Consulting can be found at my policy journal: www.policyinsider.com

Some client work

- Currently involved in work on predictive modeling, forecasting in health and chronic disease management.
- Completed a major study for the UK Department of Health on the social impact of electronic prescribing.
- Advised the intergovernmental Council of Europe on e-health, leading to new recommendations to member countries.
- Developed leading-edge policy papers for the UK Department of Health on digital interactive television, and telehealth.
- Advised a Fortune 100 pharmaceutical company on its global e-business strategy.
- Advised an FT100 company on the feasibility of establishing an e-pharmacy.
- Provided regulatory advice to a health e-procurement company.
- Authored the regulatory and policy sections of a study of the structure of the European biotechnology industry.

