

A Digitally Transformed Next Normal for Healthcare



IDC #EUR146868820

The COVID-19 pandemic has highlighted the need to accelerate digital transformation (DX).



49% of healthcare providers are adding new IT projects in areas that have been revealed as weaknesses during the pandemic.

Source: IDC European Tech and Industry Pulse Survey, 2019-2020, healthcare sample



74% of UK healthcare providers see the implementation of new care models such as integrated care — to offer more personalized care services — as a top business priority.

Source: IDC European Tech and Industry Pulse Survey, 2019-2020, healthcare sample



UK healthcare organizations are focusing on becoming more empathetic.



To support these models, globally by 2023 65% of patients will have access to care through a digital front door as healthcare providers look for better ways to improve access, engagements and experiences.



IDC FutureScape 2020

To ensure the effectiveness of patient digital services, the healthcare workforce needs to rely on information systems supporting decisions and streamlining clinical processes with timely intelligence and appropriate workflow automation. Therefore, to develop empathy healthcare organizations also need to become:



PROACTIVE:
50% of healthcare organizations will prioritize initiatives related to **data programmes** to gain insights into their operations, patient services or care ecosystems.

Source: IDC EMEA, COVID-19 Impact Survey Europe, Wave 7, June-July 2020, healthcare sample



EFFICIENT:
52% of UK healthcare providers expect DX to have its biggest impact on operations **efficiency and cost optimization**.

Source: IDC European Tech and Industry Pulse Survey, 2019-2020, healthcare sample



A new approach to infrastructure to support business priorities and innovative use cases

Data and systems availability is paramount for healthcare organizations that manage a highly collaborative and mobile workforce often working in different sites, but ...

Managing, maintaining and upgrading the vast array of IT systems, on which UK healthcare organizations rely to deliver care, absorbs **64% of their IT budgets**.

Source: IDC European Tech and Industry Pulse Survey, 2019-2020, healthcare sample n = 300



Complexity is set to grow as new releases and new enterprise applications will be developed on cloud-native agile architecture.



Key clinical solutions such as EHR, medical imaging, telehealth and laboratory systems are accelerating growth in data volume and variety.



Healthcare life-dependent data is expected to grow more than **47% on average** — more than doubling every other year.

Source: IDC Global DataSphere research, 2019



Data availability is seen as the most difficult step in **AI and advanced analytics programmes** in European healthcare.

Source: IDC AI Global Survey 2019, European healthcare sample, May 2019

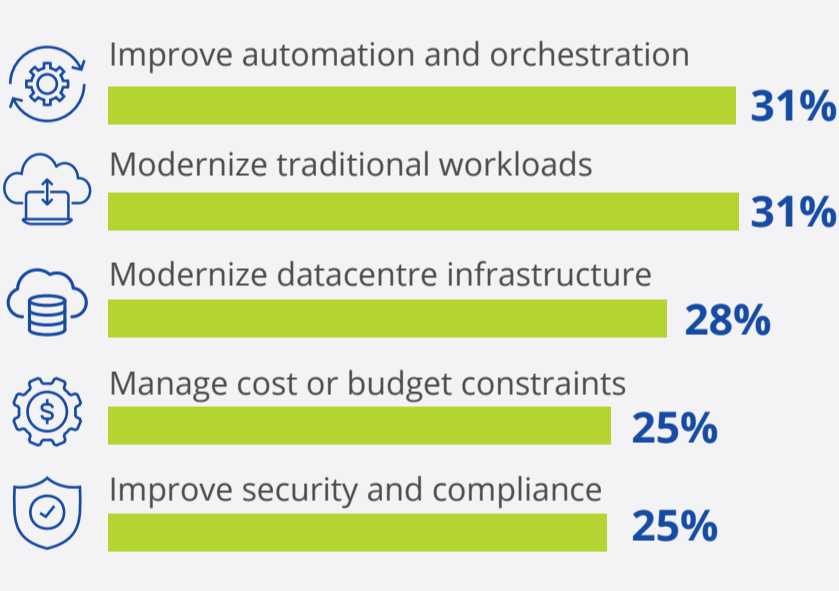


According to the UK's National Audit Office (NAO), only **54%** of trusts say their staff can **rely on their digital records** for the information they need, when they need it.

Source: <https://www.nao.org.uk/report/the-use-of-digital-technology-in-the-nhs/>

A secure, scalable and highly available IT infrastructure is essential.

Top 5 priorities related to datacentre operations for European healthcare



Source: Leveraging Cloud Computing for the European Healthcare Market (IDC #EUR146656220, July 2020)



The ICT infrastructure must support agility, recognizing a changing technology landscape and current/future application requirements where the consumption model may change dramatically in terms of where data is accessed, how it is presented and upon the devices it will be consumed.

(NHS Sherwood Forest Hospitals' Digital Strategy)

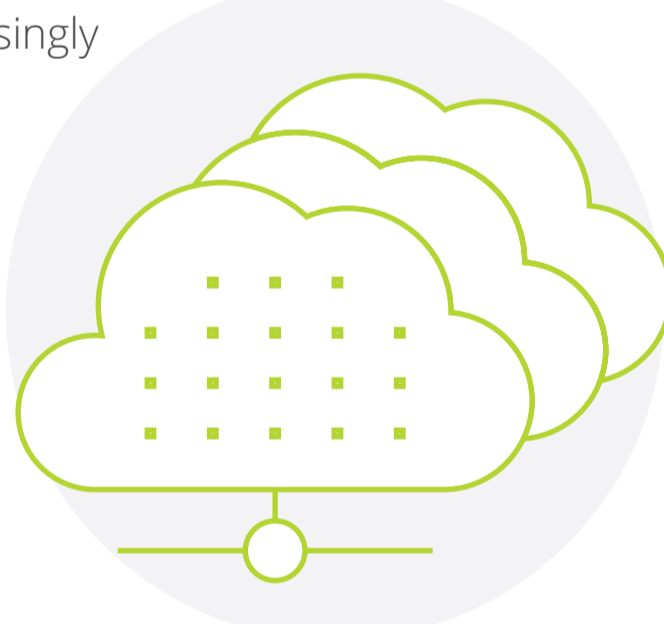
Source: <https://www.sfh-tr.nhs.uk/media/4710/digital-strategy-2016-2021.pdf>

A healthy journey to cloud

Healthcare organizations are increasingly considering cloud when:

- Upgrading, expanding or replacing datacentres
- Modernizing, transforming or replatforming key applications
- Business demands more agility or speed from IT

Source: Leveraging Cloud Computing for the European Healthcare Market (IDC #EUR146656220, July 2020)



But they're also encountering key challenges in cloud adoption, such as:

- Ensuring patient data regulation compliance and security
- Uncertainty related to TCO and health IT budgeting dynamics, which are difficult to predict
- Lock-in concerns and limited skills available in the IT department

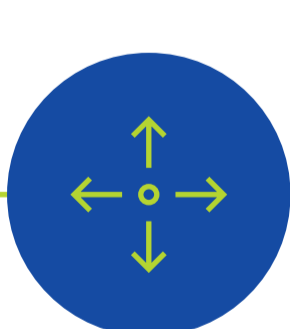
Healthcare organizations need to future-proof today's investments. **There is no one-size-fits-all formula in infrastructure modernization.**

25% of UK healthcare providers are using or plan to use **hybrid cloud**.

Source: IDC European Tech and Industry Pulse Survey, 2019-2020, healthcare sample



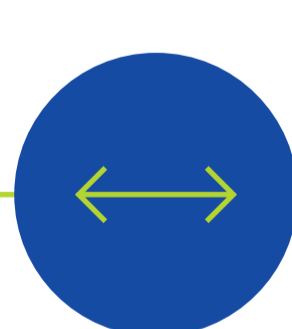
Hybrid cloud platforms enable healthcare organizations to tailor the infrastructure to their needs, leveraging hyperconverged infrastructure benefits:



CHOICE:

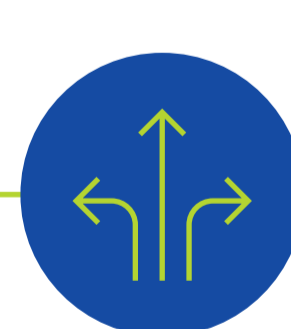
Determining the **best use of public and private cloud** and traditional IT systems:

- Balancing the needs for innovation, operational excellence and compliance
- Adapting costs to IT budget evolution



SIMPLICITY:

A **single platform** to control systems, data and users — mitigating the risks of fragmentation



FLEXIBILITY:

Elastic data and workload management drive performance as information and capabilities are delivered to health staff at the right place, at the right cost and with the right SLAs

What CIOs need to do — and what CIOs need to ask

Building a coherent and sustainable platform for innovation



Tailor the infrastructure to business needs and constraints



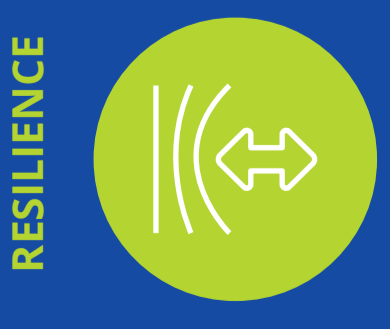
EVOLUTION

Given the evolution towards increasingly diverse, dynamic and distributed environments it's essential to:

- Eliminate guesswork for the most common scenarios (organic user growth, application upgrades and consolidations/mergers)
- Leverage new opportunities offered by cloud, but at the organization's own pace through a vendor-neutral approach



How should infrastructure evolve to suit application-specific requirements and help align IT delivery and operations to business and clinical level outcomes?



RESILIENCE

Prioritize solutions that do not force trade-offs between agility and business resilience and continuity



How should IT operations quickly monitor, track and resolve infrastructure problems that threaten business continuity?



TCO

Align infrastructure TCOs to the evolution of IT budgets and the organization's skills availability, through solutions and consumption models that are truly modular and scalable



What are the best financial options for delivering infrastructure essential to both existing and new business opportunities? How rapidly can my organization move between these options?