Predictions for 2004 in Healthcare and Life Sciences

We present Gartner’s view of the high-level trends and drivers in healthcare and life sciences for 2004, as well as the challenges and opportunities faced by healthcare providers, payers and life science organizations.

Practical business advice, whether strategic or tactical, should be considered within the context of “the big picture” — the trends, drivers, challenges and opportunities that are relevant to the industries and societies in which an enterprise operates. In this Spotlight, Gartner’s healthcare and life science team lays out the strategic context, or big picture, behind the practical advice we will provide in our 2004 research. We present the high-level predictions and strategic planning assumptions that summarize our analysis of the future course of the most-important drivers and trends in the healthcare and life science industries. This research analyzes the current state of the healthcare industry and the most-likely possibilities for the evolution of the challenges and opportunities faced by healthcare providers, payers and life science organizations.

We encourage you to read this Spotlight to understand the planning assumptions that underlie Gartner’s healthcare and life science research for 2004. We address predictions about a new generation of computer-based patient record (CPR) products, consumer-focused health plans, new business models for pharmaceutical companies, emerging technologies and government initiatives.

Predictions for providers address:

- The role of knowledge management in the new generation of CPR systems
- How the U.K.’s National Health Service (NHS) awards will affect the CPR market
- The rapid growth of picture archiving and communication systems (PACS), ambulatory CPRs, wireless LANs and speech recognition
- The emergence of personal digital assistant (PDA) solutions integrated with enterprise CPRs
- The slow, but inexorable penetration of tablet PCs
- The prognosis for government medical record-sharing initiatives

Predictions focused on healthcare payer organizations tackle:

- Customer relationship management (CRM), business intelligence (BI), disease management and the challenge of integrating heterogeneous applications
- Market forces behind the transformation from transaction processing to information management
• Evolution of collaborative healthcare models

• Prospects for consumer-focused health plans

Predictions of most interest to pharmaceutical and life science organizations address:

• The implications of declining profit margins on workforce composition, sourcing strategies and a “back to basics” approach to IT

• The role of knowledge management and collaboration technology in the genomic era

• The future of “big pharma” and the “blockbuster drug” model

• The outlook for clinical trials automation

Prediction topics of interest to all stakeholders include:

• How compliance with the Health Insurance Portability and Accountability Act (HIPAA) transactions regulation will progress

• Trends in HIPAA security regulation compliance, including business continuity planning

• Trends in IT governance, IS departmental organization and return on investment (ROI) analysis

We suggest that you begin with Joanne Galimi’s summary of the major trends in the healthcare and life science industry (see “Predicts 2004: Healthcare”). Follow the links in her overview to the research pieces that analyze trends and provide predictions specific to the major industry segments, as well as the pieces on emerging technologies and IT management that are relevant to all healthcare and life science organizations. We look forward to your comments and inquiries throughout 2004.

Jim Klein
Editor in Chief

Healthcare

spotlight.feedback@gartner.com