The Black Book of Global Healthcare IT

2025 EDITION | **Q2 2025** UPDATE

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Introduction

The global landscape of electronic health records (EHR) and healthcare information technology (HIT) has undergone significant shifts as of Q2 2025. This update report expands upon the key insights originally detailed in the Black Book 2025 Global Healthcare IT report, emphasizing the rise of regional and multi-national vendors who have emerged as frontrunners in an increasingly competitive and complex international market.

Methodology Overview

This supplemental report draws from survey responses from over 11,000 clinicians, IT leaders, and healthcare operations executives spanning 44 countries, building upon the original study's 30,000 respondents across 110 countries. Vendor performance is evaluated against 18 key performance indicators (KPIs), including localization, user satisfaction, adaptability, interoperability, and regulatory compliance.

To accurately gauge the potential EHR user pool in these 44 more industrialized or modernized countries, Black Book Research identified an estimated total of approximately 1.2 million relevant healthcare professionals and healthcare IT decision-makers. This estimate included physicians, nurses, healthcare IT specialists, administrators, and executives across various healthcare settings, including hospitals, clinics, and integrated health systems. To achieve a confidence level of 95% with a margin of error of ±3%, standard statistical sampling formulas were applied, indicating an appropriate sample size of approximately 1,067 respondents for smaller populations, scaling down proportionately to about 384 respondents including larger, densely populated countries. The actual survey response rate significantly exceeded these thresholds, with over 11,000 respondents, successfully surpassing the minimum required for statistical validity at a 95% confidence level with a ±3% margin of error.

Dominant Trends and Market Shifts

Increasingly, regional and multi-national EHR vendors are surpassing U.S.-based market leaders, driven by political factors, digital sovereignty initiatives, rising nationalism, and the demand for systems deeply integrated into local healthcare practices. This shift signals a significant realignment away from the once-dominant American software providers.

According to Black Book Research's recent surveys conducted in March and April 2025, several key statistics have highlighted these market shifts:

- 88% of healthcare organizations outside the U.S. now prioritize regional software providers due to improved localization and faster compliance with local regulations.

- User satisfaction rates for regional EHR solutions reached an average of 91%, compared to a declining rate of 68% for U.S.-based systems.

- 79% of international healthcare leaders report political and digital sovereignty considerations influencing vendor selections, reflecting heightened awareness and sensitivity towards national data control and security.

- Over 84% of surveyed respondents identified regional vendors as providing superior customization and adaptability to specific local clinical workflows.

- Implementation timelines for regional vendors are on average 40% shorter than those of major U.S.-based EHR providers, enhancing their attractiveness in dynamic healthcare environments.

- Cost transparency and predictable pricing structures from regional vendors achieved an approval rate of 82%, contrasting sharply with 47% satisfaction for major U.S.-based competitors.

These statistics underscore the shifting preferences of global healthcare pro.

Notable Vendor Insights and Market Performance, Q1 2025

Dedalus (Florence, Italy)

Dedalus continues to assert dominance in Europe and beyond, with aggressive Q1 2025 growth in the UK and India. The company launched Dedalus Clinical Pathways 2.0, an AI-powered care orchestration module tailored for national health systems. Recent deployments include the full replacement of legacy EHRs in NHS hospital trusts in Northern England and four new regional health networks in Germany. Dedalus has also formalized partnerships with public sector digitization programs in Sweden and Ireland. The vendor is increasingly recognized for its ability to localize interfaces and meet country-specific privacy and data residency standards. A recent Black Book survey found that 93% of Dedalus users in Europe rated the platform's clinical documentation tools as better aligned with their local workflows than U.S.-based systems. Its expansion in Latin America includes onboarding two major private hospital groups in Argentina. Dedalus also led Q1 regional vendor satisfaction rankings in seven European markets.

MV Sistemas (Recife, Brazil)

MV Sistemas has scaled its operations further across Latin America with new deployments in Colombia's public health network and a multi-hospital rollout in Ecuador. The SOUL MV platform introduced native FHIR data-sharing capabilities in Q1 2025, further positioning MV as a regional interoperability leader. The firm also partnered with a Brazilian telecom provider to launch a mobile EHR solution optimized for rural clinics. MV has begun formal marketing in Spain and Portugal, leveraging linguistic and clinical workflow similarities to establish early footholds. In Mexico, it won a bid to digitize a prominent university hospital group. MV was selected by 87% of surveyed Latin American respondents as the vendor with the most intuitive mobile user interface. The company now supports over 600 facilities in the region and was recently accredited for compliance with Argentina's digital health certification body.

InterSystems TrakCare (Cambridge, Massachusetts, USA)

Despite its U.S. roots, InterSystems has remained globally competitive due to its modular design and local market customizability. Q1 2025 saw new wins in Scotland, where TrakCare was chosen by three NHS boards for laboratory and patient administration modules. The vendor also launched TrakCare Community Connect for integrated ambulatory-specialist coordination in the UAE. In Brazil, a hybrid public-private collaboration led to the implementation of TrakCare's infection control suite in 14 hospitals. InterSystems has continued to expand its translation library and clinical dictionary, now supporting 24 languages natively. TrakCare's modularity earned it a 91% satisfaction rating among survey participants for ease of integration into existing hospital tech stacks. A regional deployment in Kazakhstan is also underway, demonstrating TrakCare's flexibility in emerging markets. Key UK growth efforts include alignment with NHS Digital's interoperability roadmap.

Philips Tasy (Amsterdam, Netherlands)

Philips Tasy entered Q1 2025 with major wins in Andalusia, Spain, and Abu Dhabi's primary care network. The vendor added AI-based predictive charting and embedded analytics modules tailored to emergency departments. Tasy's cloud-native version now runs fully in Microsoft Azure and has been rolled out across a three-hospital public system in Bavaria. Philips also launched a pilot program with the Portuguese Ministry of Health for radiology PACS-EHR fusion. Tasy was recognized by 89% of Black Book survey respondents in Latin America for having the most stable cloud uptime among regional EHR vendors. Continued growth in Germany includes two additional university-affiliated clinics signed in March. Its strong showing in UAE's public tenders has opened doorways for further GCC expansion.

Comarch Healthcare (Kraków, Poland)

Comarch introduced an AI-assisted medical documentation summarization engine in Q1 2025, now in use across several Swiss private hospital chains. Its EHR has been selected by Austria's Styria region for phased deployment across 11 facilities. In the UK, Comarch is engaged in a feasibility pilot with NHS England for community care record integration. Comarch's rapid-deployment strategy, which installs a full EHR suite in less than six weeks, was praised by 84% of users in recent surveys. The vendor also enhanced its telemedicine module with speech recognition tools customized for multilingual European populations. Notably, Comarch expanded further into the DACH region, with an interoperable outpatient solution now live in Munich's private diagnostics sector. The firm is also in advanced talks with Ireland's HSE for lab information system implementation.

Asseco Central Europe (Bratislava, Slovakia)

Asseco launched a new health analytics platform, Asseco Insights, in Q1 2025 to complement its EHR offerings. The vendor signed a contract with the Czech Ministry of Health to expand its patient portal and medication adherence features nationwide. In Lithuania and Hungary, Asseco now leads digitization projects spanning both hospital care and national registries. The Slovak government extended its contract with Asseco for its ePrescription backbone and upgraded it to support digital therapeutics. In a survey of Central European EHR clients, 91% cited Asseco as the most responsive vendor to changes in health policy regulations. Asseco's strategy to modularize its offerings has resulted in new uptake among private outpatient clinics in Poland. Its public health reporting module is also under evaluation by Estonia's health informatics authority.

Meierhofer (Munich, Germany)

Meierhofer achieved major success in Q1 2025 by securing its first clients in the Netherlands through a collaboration with a chain of post-acute rehabilitation hospitals. The company rolled out advanced ICU monitoring dashboards and a nurse-centered medication reconciliation interface. It also became the first German-headquartered EHR vendor to fully meet the EU's new Health Data Space (EHDS) interoperability benchmarks. Meierhofer's clinical decision support engine was enhanced with embedded pharmacogenomics data fields for oncology departments. 86% of clients surveyed in German-speaking regions praised Meierhofer's user interface as more intuitive than its American competitors. Additional expansion includes pilot implementations in Luxembourg and strategic partnerships in the DACH region for surgical care automation.

NTT DATA (Everis) (Tokyo, Japan/Madrid, Spain)

NTT DATA launched a major upgrade to its ehCOS platform in Q1 2025, introducing a voice-enabled physician assistant, enhanced diagnostic coding tools, and expanded regional health dashboards tailored for Spain and Latin America. The company secured a framework agreement with the Catalan Health Service and rolled out its care coordination suite across multiple provinces in Argentina. In Portugal, ehCOS was selected for a regional health transformation initiative supported by EU digital funding. In Q1, NTT also released a population health surveillance module now deployed across 14 public hospitals in Mexico. A Black Book survey in Spain showed 88% of current clients identified NTT DATA as their top-ranked EHR vendor for long-term integration flexibility. NTT's dual presence in Japan and Europe continues to drive rapid cross-pollination of innovation across hemispheres. New R&D centers in Madrid and São Paulo are focused on AI-enabled diagnostics and mental health record standardization.

Systematic (Aarhus, Denmark)

Systematic's Columna CIS platform remains a central digital pillar for Denmark's national health system, with further Q1 expansion into emergency and mental health domains. The firm completed full deployments in three new counties in Sweden and began rollout in a regional hospital network in Norway. A key innovation in Q1 2025 includes the launch of clinician-nudged AI alerts for sepsis prevention and early discharge optimization. The Columna CIS platform was recognized by 93% of surveyed users in Scandinavia for best-in-class user interface simplicity and workflow alignment. Systematic entered formal procurement discussions with two NHS Trusts in Northern England and completed a successful integration proof-of-concept for the UK's national prescribing platform. Modular service lines are now being piloted across Finland's public-private care continuum. The company continues to lead clinical usability rankings in the Nordic region.

Health Insights (Cairo, Egypt)

Health Insights expanded the reach of its MEDiC® platform in Q1 2025, launching a new clinical dashboard designed for rural generalists and adding real-time inventory tracking for essential medicines. It completed national-scale EHR integration across 30 public health centers in Kenya and initiated a partnership with a major Gulf-based NGO to support clinics in Sudan and Yemen. MEDiC's offline-first capabilities have made it the preferred solution among remote providers—91% of surveyed users in Africa and the Middle East cited Health Insights as their top EHR for offline reliability. In Saudi Arabia, the company added support for Arabic-English dual documentation. MEDiC is also under evaluation in Tunisia for maternal health tracking under a World Bank pilot. The vendor continues to prioritize mobile-native design and decentralized interoperability.

Helmes (Tallinn, Estonia)

Helmes added new features to its national EHR backbone in Estonia during Q1 2025, including AI-assisted registry validation and secure citizen identity verification. The company expanded its consulting-led implementations into Sweden's municipal health IT infrastructure and began piloting a chronic disease registry platform in Japan's rural prefectures. A Black Book survey found 87% of clients using Helmes services trust the vendor for public health-grade security compliance. In Latvia, Helmes launched a mental health case management module integrated directly into national EMRs. In Finland, the vendor completed a pilot project supporting youth behavioral data analysis through openEHR models. The firm is a frequent collaborator with government innovation funds and maintains strong relationships with national informatics councils.

MedRegis (Bridgetown, Barbados)

MedRegis scaled its Caribbean deployments in Q1 2025, expanding into Dominica and Saint Vincent with a cloud-native EHR tailored to multi-location ambulatory providers. The company added native claims automation, chronic disease template libraries, and WhatsApp-based appointment reminders. Surveyed Caribbean providers gave MedRegis a 94% satisfaction rating for telehealth feature flexibility—the highest among small market vendors in the region. A major upgrade to the billing reconciliation engine was rolled out to three hospital systems in Trinidad. The vendor also began early market evaluations in Ghana and Guyana for its mobile-first architecture. In Q1, MedRegis partnered with two regional telecom providers to improve bandwidth optimization for its rural clients.

Open Hospital (Trento, Italy)

Open Hospital, originally launched in Uganda and now supported by NGOs and foundations, continued to grow with installations in six new facilities in Nepal, Afghanistan, and Ethiopia. Its Q1 innovations include expanded maternal care tracking, vital signs charting, and AI-assisted triage prioritization. Designed to function without consistent internet access, Open Hospital remains the preferred EHR for low-resource settings—92% of its users cited the platform's reliability in power-unstable conditions. The Italian nonprofit behind the software also signed MOUs with universities in India and Greece to expand training and implementation capacity. Its open-source model has seen a surge in community contributions, with 15 new language packs added this quarter. The solution is now in pilot phases for refugee health documentation in EU border zones.

Orion Health (Auckland, New Zealand)

Orion Health enhanced its Virtuoso platform in Q1 2025 with longitudinal care pathways and real-time data visualization for population health managers. The company secured a five-year contract with Canada's Manitoba Health to deploy a provincial HIE overlay. In Saudi Arabia, Orion launched its intelligent referral routing system across two major urban networks. It continues to support the national interoperability layer in New Zealand, which received a 94% satisfaction score in Black Book's latest Asia-Pacific HIT survey. Orion's strength in managing high-volume health data exchange has made it a finalist in national tenders in the UK and Ireland. New AI-driven alerts for medication adherence and gaps in care are currently in clinical trials at partner hospitals. Its global client base now spans 16 countries with strategic growth focused on the Middle East and EU.

Country-Level EHR Progress and Setbacks

(Insights from Q1 2025 Black Book Survey)

These insights are based on responses from 11,054 healthcare IT leaders and decision-makers across the 44-country survey sample collected during Q1 2025 by Black Book Research. Each respondent provided qualitative and quantitative feedback on regulatory hurdles, vendor satisfaction, implementation funding, and political influences affecting national and regional EHR adoption efforts. All seven profiled countries demonstrated statistically significant feedback patterns that aligned with the macro-level findings of this global report.

Based on survey responses from over 11,000 global healthcare professionals in Q1 2025, four countries stood out for notable progress or setbacks in their EHR adoption trajectories—each driven by distinct regulatory, political, and operational circumstances:

United Kingdom

While the UK has made substantial progress in interoperability standards under NHS Digital's guidance, several respondents expressed growing concern over delays in central funding disbursements and organizational disruptions linked to NHS restructuring. The withdrawal of centralized implementation support for mid-sized trusts in England led 64% of surveyed NHS stakeholders to report stalled digital projects in Q1 2025. However, localized procurement autonomy has created openings for regional EHR vendors to gain traction, particularly in Scotland and Northern Ireland.

Ireland

Ireland continues to progress in digital health infrastructure through investments tied to the Sláintecare reform program. In Q1 2025, several respondents noted accelerated pilots for integrated digital care records and a renewed emphasis on aligning hospital and GP systems. However, 57% of surveyed Irish healthcare leaders cited ongoing delays in national procurement strategies and underinvestment in regional IT staffing as major obstacles. While the Health Service Executive (HSE) has issued updated interoperability guidelines, full-scale EHR deployment remains inconsistent across regions. EU funding has supported regional innovation—particularly in maternity and radiology digitization—but respondents indicated a growing preference for non-U.S. vendors like Dedalus, Comarch, and Philips Tasy, citing better localization and faster compliance with EU privacy frameworks. Ireland's openness to cross-border collaboration may position it for future progress, but respondents stressed that success is contingent on resolving fragmented infrastructure and governance issues.

Germany

Germany experienced strong digital health momentum, with 78% of respondents indicating confidence in the revised Krankenhauszukunftsgesetz (Hospital Future Act) funding allocation processes. Surveyed providers praised the expansion of incentives for telehealth integration and secure patient data exchange. However, 41% of hospital executives cited regulatory ambiguity around data residency and consent requirements as continued friction points for full-scale EHR deployment. Regional vendors like Dedalus and Meierhofer benefited from policy-aligned platforms tailored to Germany's complex compliance needs.

India

India's rapid digital health modernization is showing mixed outcomes. Q1 2025 saw aggressive EHR implementation efforts under Ayushman Bharat Digital Mission (ABDM), with strong uptake in public-sector facilities. However, 53% of survey respondents from private hospitals reported insufficient incentives and a lack of trained EHR professionals as major barriers. Fragmented state-level standards and low rural infrastructure penetration continue to slow national cohesion. Respondents cited regional vendors such as Dedalus and Comarch as offering more deployable solutions in decentralized states.

France

France remains one of the highest-performing countries for EHR adoption in Q1 2025, with 83% of surveyed providers expressing satisfaction with government support under the "Ma Santé 2022" modernization program. Yet, recent tariff hikes and retaliatory trade restrictions linked to U.S. policy shifts under the Trump administration caused 71% of French respondents to deprioritize U.S.-based EHR procurement. French hospitals increasingly favor European vendors like Dedalus, Comarch, and Asseco, perceived as more geopolitically aligned and cost-stable in the current climate.

Saudi Arabia

Saudi Arabia continues to demonstrate robust EHR progress through Vision 2030 health system reforms. In Q1 2025, 76% of surveyed hospital executives reported increased satisfaction with national-level digital infrastructure, driven by expanded interoperability mandates and significant investment in unified health records. However, delays in aligning private sector systems with government standards remain a top concern. Notably, local and regional vendors like Orion Health and Health Insights have gained market share through cloud-native, bilingual, and modular EHRs adapted to GCC requirements. New procurement policies under the Ministry of Health emphasize cybersecurity compliance and regional data residency, pushing U.S.-based vendors to the sidelines due to geopolitical scrutiny.

Brazil

Brazil stands out as one of the most dynamic EHR markets in Latin America. In Q1 2025, 81% of surveyed public hospital administrators reported improved clinical workflow digitization under the government's e-SUS and CONECTA SUS initiatives. MV Sistemas and Philips Tasy remain dominant, and both vendors have rolled out updates that support national clinical terminologies and pandemic response registries. However, financing inconsistencies across states and a growing digital divide in remote areas have slowed universal EHR adoption. 62% of surveyed rural facilities said vendor affordability and mobile-first solutions were critical—areas where U.S. vendors underperformed. Regional champions continue to gain traction through deeper alignment with Brazil's Ministry of Health strategies.

These findings illustrate how national political shifts, funding realignments, and regulatory clarity (or the lack thereof) directly influence EHR vendor selection and system success on the ground.

Black Book Supporting Global HIT Market Statistics (March-April 2025)

Recent Black Book Research statistics gathered in March and April 2025 provide compelling evidence of the rising prominence of regional vendors and the declining global popularity of the four major U.S.-based EHR providers:

1. **Localization Effectiveness**: 85% of healthcare organizations using regional or multi-national vendors reported high satisfaction rates specifically related to localization capabilities, compared to just 52% of organizations using U.S.-based EHRs.

2. **Implementation Speed**: On average, regional vendors achieved a 43% faster EHR implementation timeline compared to U.S.-based providers.

3. **Cost-Efficiency**: 78% indicated regional vendors offer more transparent and predictable pricing, compared to only 39% satisfaction from users of U.S.-based firms.

4. **Compliance and Privacy**: Regional vendors received 92% approval for compliance with local regulations, significantly outperforming U.S.-based vendors at 63%.

5. **Vendor Support and Service Quality**: Regional vendors had an 89% satisfaction rating versus 61% for major U.S.-based providers.

6. **Political and Regulatory Impact**: 74% of respondents acknowledged geopolitical and digital sovereignty concerns impacting vendor selection, disadvantaging U.S.-based vendors.

Challenges Facing U.S. Vendors

Epic Systems, Oracle Health, MEDITECH, and Altera Digital Health face notable international resistance from anti-American sentiment, tariff-related cost escalations, digital protectionism, and local adaptability issues. This friction was reported by 71% of surveyed organizations using U.S.-based EHRs.

The Q2 2025 update reinforces the critical role of localization, agility, and deep partnership in global EHR market success. Regional and multinational vendors capable of aligning with local healthcare ecosystems continue to reshape the international HIT landscape.

Looking Ahead: Global EHR Disruption and Uncertainty

Q3 & Q4 2025 Outlook

As the global healthcare IT landscape continues to evolve, Black Book Research projects significant shifts in the electronic health record (EHR) and interoperability markets throughout Q3 and Q4 2025. Based on ongoing intelligence from 54 country-level provider panels and vendor polling, geopolitical instability, upcoming elections, supply chain disruptions, and regulatory overhauls are expected to create new adoption patterns, vendor exits, and market entry points. Below is an analysis of eight key regions where substantial developments are underway.

Ukraine and Eastern Europe

The ongoing war in Ukraine has had a cascading effect on digital health progress throughout Eastern Europe. EHR modernization efforts, once bolstered by EU digital infrastructure grants, have been placed on indefinite hold in Ukraine and slowed in bordering nations such as Moldova and Romania. Hospitals in affected zones are increasingly turning to mobile-first and cloud-hosted EHRs that can operate in low-connectivity environments. Rapid deployment platforms such as Open Hospital have seen increased demand in temporary clinics and refugee care centers, particularly where health systems are operating without stable power or physical infrastructure. Looking ahead, Black Book forecasts that Eastern Europe will shift toward agile, modular digital health systems that can withstand conflict and migration pressures.

China

China's healthcare software market is preparing for a major contraction of foreign EHR vendor activity following the July 2025 enactment of sweeping data localization and cybersecurity law revisions. The new mandates will require all foreign vendors to house patient data exclusively on domestic servers and submit to annual code audits. These requirements effectively disqualify many international EHR providers unless they rapidly restructure through domestic partnerships or localized development. According to Black Book's Q2 survey of Chinese hospital CIOs, 71% plan to migrate to Chinese-developed solutions by year-end. As China doubles down on sovereignty in digital health, international vendors will likely face increased barriers to re-entry, forcing strategic reallocation of resources to other growth regions.

United States: Trade Tariffs and Export Restrictions

The Trump 2025 administration's tariff policy resurgence is expected to complicate EHR deployment costs, particularly where U.S.-based vendors provide core technologies, cloud services, or API infrastructure to clients abroad. These tariffs are already influencing procurement teams in Southeast Asia and Europe, where price sensitivity and nationalistic procurement are shaping a preference for non-American solutions. In Q2 2025, 67% of European health system CIOs told Black Book they are deferring large-scale EHR purchases until further tariff clarity is achieved. If trade tensions escalate further, the long-term impact may be the splintering of global health IT ecosystems into competing geopolitical blocs.

Netherlands

The Dutch Ministry of Health has announced accelerated timelines for its nationwide EHR modernization plan, requiring all approved vendors to meet EU Health Data Space (EHDS) interoperability and public cloud standards by December 2025. These include compliance with FHIR exchange protocols and integration with EU-wide patient summary databases. Several vendors, including regional European firms and Nordic-based developers, are already undergoing certification to maintain eligibility. Vendors without EU localization strategies or cloud compliance credentials may be frozen out of Dutch procurements starting in Q4. The Netherlands is positioning itself as a testbed for pan-European interoperability.

South Africa

Infrastructure instability continues to impede health IT progress in South Africa. A combination of load shedding (planned blackouts), cyberattacks on state health networks, and underfunded digital infrastructure has left many regions unable to pursue full-scale EHR deployment. However, mobile-native EHR platforms are emerging as critical tools in overcoming these constraints, especially in peri-urban and rural settings. Vendors like Comarch and Health Insights are exploring partnerships with solar infrastructure firms to bundle energy-resilient EHR packages. Black Book predicts South Africa could become a model for digital health adaptation in constrained environments if modular systems and local telecom partnerships mature in the next six months.

Indonesia

Indonesia's Ministry of Health is finalizing legislation that will mandate the registration and implementation of EHR systems by all licensed care providers by October 2025. While this move supports the country's Universal Health Coverage expansion, it has exposed significant capacity gaps among EHR vendors. 63% of hospital leaders in Indonesia surveyed by Black Book say they lack access to systems localized for Bahasa Indonesia, and fewer than 30% have cloud options that meet Ministry standards. An influx of regional software firms from Singapore, India, and Australia is expected in Q3 as vendors race to meet this demand. This regulation could spark one of the largest EHR adoption waves in Asia-Pacific if timelines are met and localization is prioritized.

Latin America (Excluding Brazil)

While Brazil continues to dominate Latin America's health IT growth, neighboring countries are experiencing mixed digital health trajectories. In Peru and Venezuela, political instability and budgetary constraints have delayed national EHR frameworks. Argentina's 2025 inflation spike has disrupted funding for digital health rollouts, forcing private sector actors to lead innovation. Private hospital networks are investing in light-cloud EHR platforms and flexible interoperability tools to maintain momentum. Vendors like MV Sistemas, Dedalus, and Philips Tasy are tailoring agile product lines to smaller networks and outpatient settings. Regional deployment success will depend on vendor pricing models and political stabilization efforts in Q3 and Q4.

Upcoming Elections in Key Markets

Several countries critical to global EHR vendor strategy—including Canada, Poland, and Thailand—are entering election cycles in late 2025. These transitions have introduced uncertainty into public health IT budgets. In Canada, several provincial leaders are pressing federal counterparts to renew or increase EHR modernization funds in anticipation of potential government changes. In Poland, health IT expansion efforts have been closely tied to EU funding mechanisms, which could be restructured under a new administration. Thailand's national digitization framework may also shift priorities depending on electoral outcomes. Black Book polling shows that 62% of health executives in these countries are taking a "wait-and-evaluate" approach to large-scale HIT procurement until after election results are finalized.

Emerging Global Trends to Watch (Q3–Q4 2025)

- Vendor exits from restrictive or high-regulation markets (notably China and potentially France)

- Rising adoption of modular, cloud-native EHRs over legacy monolith systems

- Acceleration of AI-powered documentation and clinical support bots in Europe and Oceania

- Expansion of national health data platforms in GCC nations and East Africa

- Increasing reliance on openEHR and FHIR interoperability standards worldwide

Taken together, these dynamics point to a fragmented but opportunity-rich global EHR marketplace. The remainder of 2025 will be shaped by how quickly vendors can respond to geopolitical risks, compliance barriers, and fast-changing procurement environments. Black Book will continue real-time monitoring and global respondent feedback through its next major Global HIT Market Update

About Black Book Research

Black Book Research is a fully independent healthcare technology and services research firm recognized globally for its transparent, vendor-agnostic methodology. With active respondent panels spanning 54 countries and over 800,000 verified healthcare stakeholders worldwide, Black Book delivers rigorous, data-driven insights into health IT adoption, satisfaction, and market dynamics.

Unlike pay-to-play models, Black Book does not accept vendor sponsorship, advertising, or influence in its research processes. All rankings, reports, and satisfaction scores are derived solely from anonymous client and user feedback. This ensures unbiased, evidence-based analysis free of commercial bias or favoritism.

> Black Book's international focus extends across public and private health systems, from advanced digital health economies to low-resource nations seeking scalable, equitable IT infrastructure. By supporting national ministries, providers, and procurement stakeholders with high-integrity performance data, Black Book is committed to advancing global interoperability, digital sovereignty, and technology innovation in service of improved health outcomes for all.