

EU DIGITAL HEALTH MARKET SPOTLIGHT – Germany, Denmark, Estonia

After reading this factsheet you should:

- Understand the EU Digital health market spotlight.
- Become familiar with the digital health market spotlight in Germany, Denmark, and Estonia.
- Have links to related resources.



What is a market spotlight?

A targeted analysis that offers in-depth insights into a particular market or industry is referred to as a "market spotlight." It tries to identify significant trends, opportunities, challenges, and industry sector leaders.

Why is there an EU digital health market spotlight?

The digitalization of health services in the EU has increased in the past number of years. The European Programme of Work (EPW) launched the flagship [Empowerment through Digital Health](#) programme, which emphasises digital health as a promising accelerator for the reform of health systems.

The EU DESI ([Digital Economy and Society Index](#)) evaluates the digital performance and competitiveness of the member countries of the European Union (EU), gauging their development in digitalization across several criteria.

Digital health can decrease the workload and associated expenses for health service providers while also improving the quality of services and users' access to health information. The digital health markets in Germany, Denmark, and Estonia have attracted a lot of interest and funding.



Digital health market spotlight Germany

In the European Union, Germany is one of the biggest and most important marketplaces for digital health. Germany has been actively implementing digital health technologies with the aim to enhance patient care and streamline healthcare procedures.

- **Electronic Health Records:** The goal of Germany's "[Telematics Infrastructure](#)" project is to create a countrywide network for safe data interchange between healthcare providers.
- **Telemedicine and Telehealth:** Platforms such as [eHealth](#) enable patients to access healthcare professionals and other health services. To promote telemedicine and telehealth the German government has expanded reimbursement regulations.
- **Digital Health Apps (DiGa):** To promote the use of digital health apps, Germany introduced the "[Digital Healthcare Act](#)" in 2019. The act ensures that everyone with statutory health insurance ([approximately 90%](#) of the country) is eligible for reimbursement for safe and reliable digital health applications. Since then, digital therapeutics can be [prescribed by doctors](#) and reimbursed by public payers.
- **Data Privacy and Security:** Strict laws, including the General Data Protection Regulation (GDPR), make sure that patient data is handled safely and with the appropriate consent.
- **Digital Health Start Ups:** Germany provides a range of funding options, incubators, and support programmes to promote innovation in the field of digital health.



Digital health market spotlight Denmark

Denmark is well recognised as a leader in digital health innovation with a well-established healthcare system that welcomes technology. The [National Strategy for Digitalisation](#) published in May 2022 by the Ministry of Finance outlines the Danish vision for “the digital healthcare of the future”. It covers aspects including digital infrastructure, digital skills and education, digital government services and digital entrepreneurship and innovation.

- **Integrated Health Data Infrastructure:** A centrally located health data infrastructure called the “[Danish Health Data Authority](#),” enables safe and interoperable patient data interchange.
- **National Electronic Health Record System:** “[The Health Platform](#)” promotes the easy transfer of patient data amongst healthcare professionals.
- **Telemedicine and Telehealth:** [The Danish e-Health Portal](#) allows for patients to consult with doctors and other medical staff online, access to their medical records, prescription renewals, test results and registration as an organ donor.
- **Data Privacy and Security:** Strict laws, including the General Data Protection Regulation (GDPR), make sure that patient data is handled safely and with the appropriate consent.
- **Digital Health Start Ups:** Germany has some of the best [health tech accelerators and incubators](#) in Europe.



Digital health market spotlight Estonia

With a highly developed and integrated digital healthcare ecosystem, Estonia is acknowledged as a global leader in digital health. [E-Health Strategy](#) is part of the Estonian National Health Plan and outlines anticipated e-health improvements for the healthcare industry and its partners. Estonia is a member of the [Global Digital Health Partnership \(GDHP\)](#) which is a group of national governments, territory governments, and international organisations established to assist in the efficient implementation of digital health services globally.

- **eHealth System:** [E-Estonia](#) is a digital society that delivers public services including eHealth.
- **Digital Identity:** Every person in Estonia has access to a safe digital identity that enables them to schedule appointments, examine their [e-Health records](#), and interact with healthcare providers online.
- **Telemedicine:** Estonia’s eHealth System supports secure video consultations and remote data collection due to the integration of telemedicine tools.
- **Digital Prescriptions and Interoperability:** [e-Prescription](#) is a centralised paperless system used to issue and manage prescriptions. Estonia prioritises interoperability, providing seamless data transmission between healthcare providers and other stakeholders.
- **Health Data Exchange:** A secure data exchange platform called [X-Road](#) has been developed to allow access to health data while preserving privacy and security.