

Recovery/Resilience Agenda: Integration of digital health in the EU healthcare systems

Lessons learned from the COVID-19 pandemic and recommendations

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Executive summary

The medical technology (medtech) industry has made significant efforts on various fronts to help manage the COVID-19 pandemic in Europe. While providing essential solutions like testing and protective equipment, the industry has observed developments in digital health and proposes a vision for how digital health technologies can help accelerate the recovery and build more sustainable European healthcare systems.

The current paper offers observations on how the pandemic has impacted digital health in Europe, namely via:

- a transition to online consultations and remote monitoring;
- the introduction of contact tracing apps;
- the realisation of certain shortcomings of the status quo;
- a new openness to digital health by EU citizens.

Capitalising on this and looking into the future, we are offering specific recommendations for building on this momentum, in order to serve sustainable recovery and economic resilience, namely:

- keep and build upon digital health measures, introduced during the pandemic;
- advance the European Health Data Space;
- improve incentives and reimbursement of digital health;
- create new models for developing and deploying AI for more sustainable healthcare.

Impact of the COVID-19 pandemic on digital health in Europe

The COVID-19 pandemic has disrupted healthcare delivery around the world. Directly or indirectly, this has made the pandemic a **watershed moment** for digital health in Europe in the following ways.

- Due to the pandemic, there has been a **rise in the adoption of some digital health technologies**. We have seen a widespread transition to online consultations, diagnosis, and treatment to comply with the need for social distancing and protection of healthcare professionals and patients. GPs in Germany for example reported more than 1.2m hours of video consultation in the second quarter of 2020, compared to a mere 583 in the same quarter of 2019, a more than 2,000-fold increase. Remote patient monitoring tools have ensured safe provision of care for patients with chronic conditions over distance.¹
- Europeans have also taken to various **COVID-19 contact tracing apps**. Despite variances in their effectiveness depending on the national context, citizens have overall shown a greater willingness to share data to alleviate the measures of the pandemic. In October 2020 the EU Commission and Member States set up an effective European Federation Gateway Service allowing for the connection of up to 20 national tracing apps.²
- While in some cases digital tools could quickly be deployed to address the need to speed up sharing of data and intelligence, overall the pandemic has **exposed digital health shortcomings**, for example in significant delays in care delivery and missed future opportunities because health information (i.e. test results, public health statistics) has been kept, aggregated and transmitted on paper and fax.³
- As a result, there is now a **new openness to digital health** on the part of citizens and patients, healthcare professionals and providers. Some Member States have tried new ways of organising healthcare, and have found they work, they are safe, they add speed and convenience, and therefore, contribute to better access and quality of care for patients.

EU Member States commitment to digital health

EU Member States have acknowledged the critical role of digital health data in their December 2020 Council conclusions:

“The ongoing pandemic provides a direct demonstration of how data will transform health and care. Rapid pooling of and access to COVID-19 data across countries have played a critical role in

¹ See ZI Institute, *Veränderung der vertragsärztlichen Leistungsanspruchnahme während der COVID-Krise: Tabellarischer Trendreport für das 1. Halbjahr 2020*, November 2020, p10, available at <https://bit.ly/2LIGKhE>; the European Society for Cardiology (ESC) has advocated for increased use of telehealth especially for vulnerable groups; see ESC, “Guidance for the Diagnosis and Management of CV Disease during the COVID-19 Pandemic” <https://www.escardio.org/Education/COVID-19-and-Cardiology/ESC-COVID-19-Guidance>. Telehealth services have also proven effective for dialysis patients, see Ronco C et al, “Remote patient management of peritoneal dialysis during COVID-19 pandemic”. *Peritoneal Dialysis International* 2020;40(4):363-367, <https://doi.org/10.1177/0896860820927697>.

² See the Commission website on the tracing app: https://ec.europa.eu/info/live-work-travel-eu/coronavirus-response/travel-during-coronavirus-pandemic/how-tracing-and-warning-apps-can-help-during-pandemic_en.

³ The Netherlands set up an information sharing platform within weeks, see <https://innov.afro.who.int/global-innovation/national-portal-for-exchange-of-covid-patients-data-in-the-netherlands-2207>.

understanding transmission and infection, identifying drug targets, and understanding disease and vaccine developments.”⁴

The medtech industry welcomes the commitment of Member States to the digital transformation of healthcare. To achieve this and build on the conveyed potential, it is important to advance the trends, which have been started, and avoid going back to pre-pandemic approaches to digital health.

The way forward & recommendations: building on the momentum

The medical technology (medtech) industry considers it critical that this momentum be used to advance and accelerate the digital transformation of healthcare, by learning from the accelerated implementation of digital health during the COVID-19 outbreak. Furthermore, the medtech industry is convinced that the digital transformation of healthcare will advance the sustainable recovery and building of the future resilience of the European economy.

MedTech Europe derives the following **recommendations for the future recovery agenda**:

- **Build on the COVID-19 digital health momentum:** Underlying and underpinning the momentum on digital health have been national regulatory steps to enable digital health technologies, including amending rules requiring face to face interactions between healthcare professionals (HCPs) and patients, and extending or expanding funding/reimbursement for teleconsultations. The way forward would be for **these measures to be kept in place and built upon**. A return of Member States to pre-pandemic approaches (for example in the area of teleconsultations) would be detrimental for patients, HCPs and healthcare systems.
- **Advance the European Health Data Space:** Before the pandemic, digital health deployment, and sharing health data, has faced legal, technical, commercial and socio-cultural and skills barriers. Addressing these requirements requires leadership and commitment from all sectors. The EU project of the European Health Data Space, alongside funding and investment programmes like Horizon Europe and Digital Europe, reflects a commitment to address these barriers and support it with financial resources. It would also enhance the management of the pandemic, the tracking of incidences, and consequently, the saving of lives. The medtech industry will continue to engage and support future EU initiatives related to health data.
- **Consider incentives and reimbursement of digital health:** The rise of telehealth services during the pandemic showed the critical factor of reimbursement provisions: often doctors were able to quickly adapt and start offering them, after reimbursement mechanisms were introduced. Europe’s public healthcare systems are responsible for the bulk of healthcare spend (compared to personal and private sources). Unlocking these resources for digital health technologies has been slow. MedTech Europe calls on national health authorities and payers **to exchange best practices and find the right mechanisms to recognise and incentivise the value of digital health technologies**. If consistently

⁴ See the December 2020 European Council conclusions on COVID-19 lessons learned in health, <https://www.consilium.europa.eu/media/47653/st14196-en20.pdf>.

adopted around Europe, these technologies will not only enhance crisis-preparedness but also the resilience and sustainability of European healthcare systems.

- **Create new models for developing and deploying AI for more sustainable healthcare:** The mid- and long-term recovery of the European economy will require a more comprehensive approach towards healthcare that reduces inefficiencies, improves access to healthcare for all, alleviates the burden on the workforce, and empowers patients. Artificial Intelligence in healthcare can significantly impact all these issues if barriers are addressed at European & Member State level. In October 2020, Deloitte and MedTech Europe published a report on the socio-economic impact of AI in Healthcare that offers specific policy recommendations around an enabling governance framework for data, appropriate funding and investment, and digital education.⁵

Conclusion

A compelling lesson of the pandemic is that the digitalisation of healthcare is urgent and is here to stay. A single actor is not able to drive this transition alone. If Europe wants to make best use of digital health to cope with the current crisis, to build a sustainable recovery path, and to affirm its competitiveness in the world, it needs to show strong leadership and encourage knowledge sharing going forward. MedTech Europe stands ready to collaborate with European and national authorities to facilitate the digital transformation of healthcare.

About MedTech Europe

MedTech Europe is the European trade association for the medical technology industry including diagnostics, medical devices and digital health. Our members are national, European and multinational companies as well as a network of national medical technology associations who research, develop, manufacture, distribute and supply health-related technologies, services and solutions.

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⁵ For more information and the report go to <https://www.medtecheurope.org/resource-library/the-socio-economic-impact-of-ai-in-healthcare-addressing-barriers-to-adoption-for-new-healthcare-technologies-in-europe/>