

EHTEL

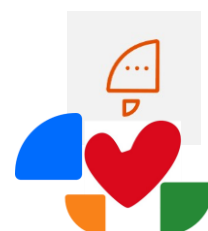
Trends in local markets #2

A behind-the-scenes look into the Danish health IT market

EHTEL webinar for members and friends

23rd November 2023

9.30 – 10.30

sundhed.dk**medcom**
 Centre for
Digital Psychiatry


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sundhed.dk**medcom**

The "engine room" - infrastructure - national services - market conditions

Joint presentation by MedCom and sundhed.dk

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Core facts and culture

Danish healthcare has:

- Universal, free and equal access
- 40 years of registration and data collection
- National health registers and databases
- Unique and reliable health data from “cradle to grave”
- Unique personal identifier, digital signature & secure login to public services

Danes:

- are used to data collection and registration
- widely trust the public sector and the public sectors handling of their data
- have experienced the benefit of digitalization – empowerment and easier everyday life
- expect good, public self-service solutions - transparency and access to own data



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Organisation of health and areas of responsibility

Main health providers:

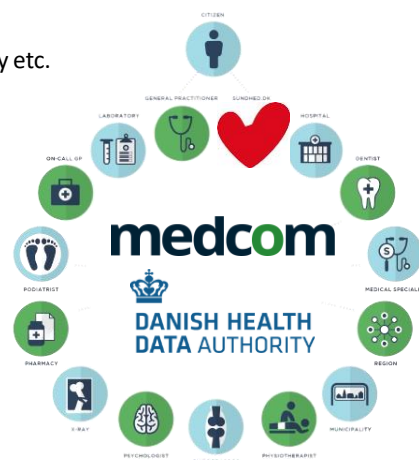
- Regions (5) – secondary care and psychiatry
- Municipalities (98) – homecare, prevention, rehabilitation
- Private practice sector (>2000 clinics) – GPs, specialist, physiotherapy etc.

Political layers, incl. eHealth governance:

- State (Ministry of Interior & Health)
- Regions (elected regional councils)
- Municipalities (elected city councils)

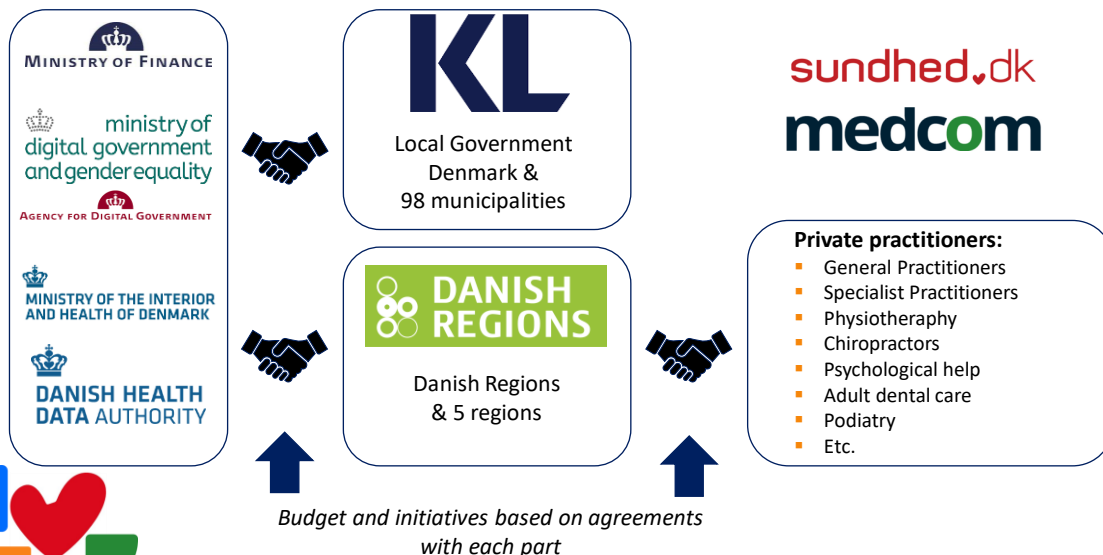
National eHealth provision:

- Danish Health Data Authority (infrastructure, registries, security)
- Sundhed.dk (health information access for patients and HCPs)
- MedCom (standardisation and data exchange)



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Political and operational structure



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National health IT implementation



DANISH HEALTH DATA AUTHORITY:

- National Service Platform and central services (Shared Medication Record etc.)
- National registries and databases
- Official national catalogue of standards and profiles + Advisory Council

MEDCOM:

- Development, test and certification of standards (CDA, FHIR® etc.)
- Data exchange across sectors and actors through standards (190+)
- System management (Health Data Network; VDX-infrastructure; Home-monitoring)



SUNDHED.DK:

- Access to personal data and information for citizens
- Easy access to patient data for healthcare professionals
- Apps, data for quality development, medical/disease manual



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MedCom in brief

Our role is to provide digital solutions that connect all the healthcare providers, as information on patients and citizens is to be shared amongst them.

MedCom develops, tests and certifies (and helps implement) digital standards that enable systems in the healthcare sector to exchange and share relevant data in a secure way.

We do it in close cooperation with all parts of the healthcare sector, incl. the IT vendors.



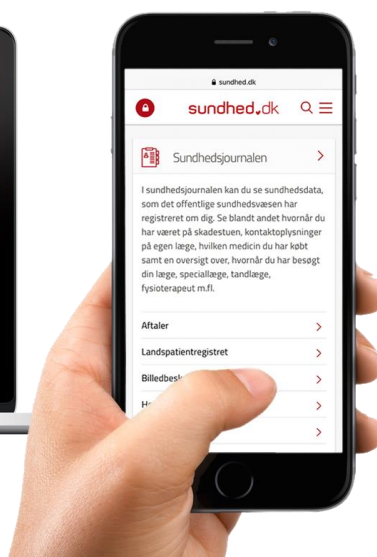
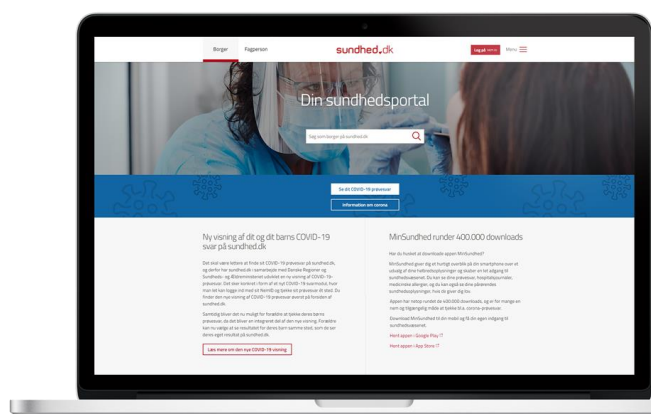
Established in 1994
Publicly funded, non-profit organisation



MedCom's standards
= 72 million
messages btw.
healthcare providers
annually

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Sundhed.dk in brief



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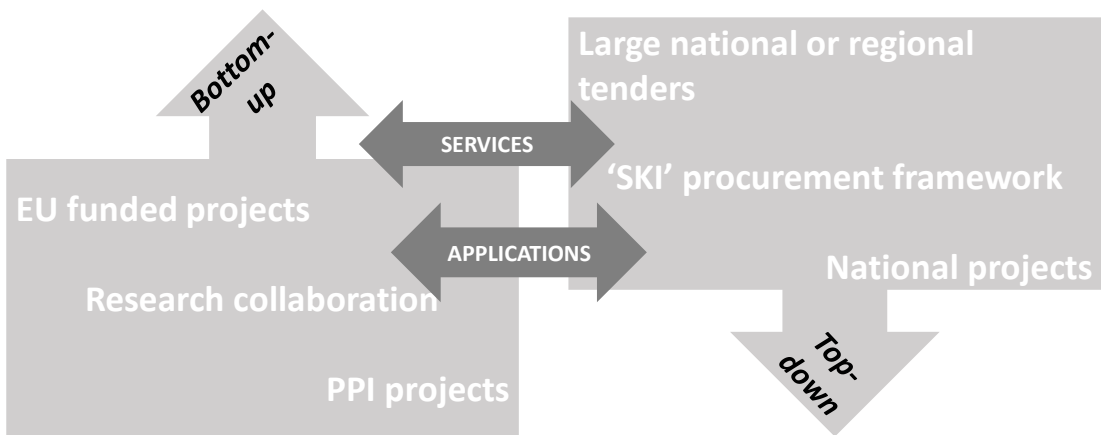
Danish market approach

Service/system categories	Who is buying	How	Specific conditions
EMR, primary sector	The individual clinic owner	Free market	Have to apply to MedCom standards
EHR, clinical systems for public hospital	Regions	Public tender	Have to apply to MedCom standards
'EHR', care systems for homecare systems	Municipalities	Public tender	Have to apply to MedCom standards
Telehealth and telecare services	Regions, public and private hospitals, insurance companies or municipalities	Public tenders, free market or Public-Private development or research projects	Evidence-based



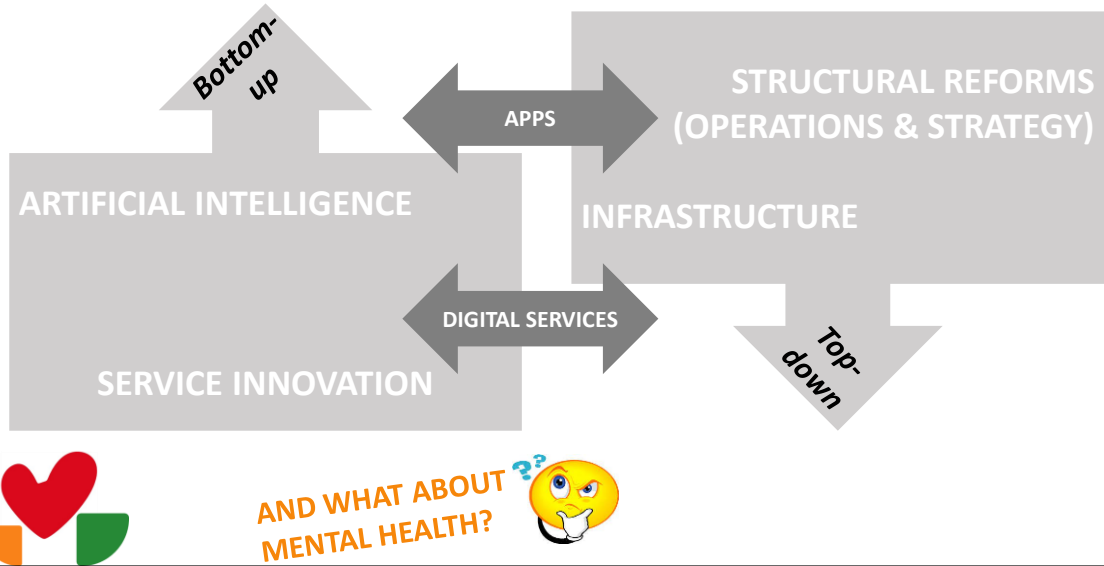
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Paths to market entry, scaling etc.



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What new is happening and coming...



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Examples...

Bottom-up

CAI-X (CENTER FOR ARTIFICIAL INTELLIGENCE), RSD
-
AI-MODEL FOR COLON CANCER TREATMENT, ZEALAND UNIVERSITY HOSPITAL

FROM LOCAL INNOVATION AND SERVICES
- E.G. TELECARE, TELEKOL, COPD BRIEFCASE - TO NATIONAL 'FUT' (JOINT DEVELOPMENT OF TELEMEDICINE) TENDER

FROM LOCAL APPS ('MYHOSPITAL' IN RSD & 'MYGP' FROM PLO) TO PUBLIC NATIONAL APPS ('MYHEALTH') AND NATIONAL APP GUIDE, APPS BY PRESCRIPTION ETC.

ENHANCED HEALTHCARE MESSAGING INFRASTRUCTURE:

- eDELIVERY
- ADDED SECURITY BUT MORE OPEN MARKET
- TRACK&TRACE OF MESSAGES

EU INITIATIVES: EHDS/eHDSI

POLITICAL HEALTH INITIATIVES:

- RESILIENCE COMMISSION
- STRUCTURAL REFORM COMMISSION
- DIGITALISATION STRATEGY

POSSIBLE MARKET TRENDS:

- GP PROVISION CHANGING?
- NEW TREATMENT DOMAINS IN PRIVATE HOSPITALS?

Top-down

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Questions and next presentation

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Innovation in action

