



## In 2020 Health Hub Vienna and partners assessed that change in the digital healthcare scene cannot be achieved without a comprehensive analysis of the Austrian status quo.

This unmet need was heightened by the fact that the COVID-19 pandemic prompted an unprecedented acceleration of digital change within the Austrian healthcare system, which made previous resources outdated. The crisis brought a storm but also a silver lining: stakeholders have been offered a glimpse into the possibilities, benefits, and pitfalls of the implementation of digital health solutions which had largely previously been blocked due to conflicting interests.

Health Hub Vienna has conducted a series of interviews, asking various stakeholders how the pandemic has changed their digital health practices, and asked them to identify challenges and use-cases where digital health solutions can integrate into the patient journey with the most impact.

**Telemedicine:** In this respect we found that regardless of the manifold benefits of telemedicine on reducing the strain on health service providers as well as patients, a lot of uncertainty remains around the human factor, financing, quality standards, data protection & ethical requirements of this method.

**Health Data:** Emergency loosening of data regulations allowed easier healthcare access, however opened the door for worries about careless data handling and shed light on the lack of sustainable infrastructure. Even though the Austrian population is largely for the usage of health data for research an innovation purpose.

**E-prescription:** The authorization of the E-prescription was a huge step forward in the right direction by all stakeholders. The service has been a success, and the long-term systematization of these features, and the implementation roadmap is being discussed.

**Digital triage:** The employment of digital triage solutions by a startup was one of the success stories of last year.

The company Symptoma offered a 96.43% accuracy for remote triage and self-triage, greatly reducing strain on health providers. There was an apparent consensus in our interviewees that these solutions will be essential within healthcare moving forward.

**IT backbone solutions** Experts find that the operational solutions that reduce tedious paperwork and streamline the patient journey are available, but the existing frameworks currently in place do not properly support them. The implementation of clear frameworks was called for which could support secure data exchange in a very complicated system of various providers and stakeholders.

**Patient empowerment:** Stakeholders suggested that the implementation of patient empowerment and self-care would greatly improve efficiency within Austrian healthcare systems as investment in self-care has been shown to put less strain on the system and reduce healthcare costs. The complexity of the AT system typically overwhelms patients and thus orientation support is essential. Importance was also placed on investing in prevention processes.

**Chronic care:** Chronic and cancer patients were highly vulnerable during this period. The effects of the lockdown and subsequent protective measures resulted in delayed hospital visits, disruption of therapies, and a minimization of routine care. The crisis exacerbated an existing issue and that the utilization of digital health solutions is necessary in order to substantially support chronic and vulnerable groups.

**Mental health:** Experts agreed that Austria is seeing a “psychiatric corona crisis” affecting mental wellbeing and the fitness of the immune system more than half a year after the onset of the pandemic. Several hotlines have provided psychological support and counselling services during this period.

Counselling services, crisis intervention and trauma support is now available digitally via video sessions and mental health applications. However, stakeholders see the opportunity to further develop these services.

**Countryside:** Stakeholders highlighted teleconsultations, telemonitoring and solutions in robotics, as well as telemedicine and integrated care solutions for the countryside. Doctor to doctor support is also a key consideration for the countryside.

Stakeholders found that the legal, medical, organizational and technological frameworks surrounding digital health solutions in Austria had much room for improvement. Key development paths were proposed including the introduction of a **regulatory sandbox for healthcare**, awareness about **medical safety** around digital tools, are important factors startups must address. Austria is a “hotbed of innovation”, but also presents a very intricate market with a complicated healthcare and reimbursement system. Companies with innovative solutions, especially startups need to be aware of all these issues to be ready for a successful entrance to the market. Ultimately, the paper calls for the **dedicated action of decision-makers to maintain the progress made within this period so that what many see as a decade of growth will not be lost**. A national effort encompassing these proposals for digital health solutions is regarded as urgent and necessary.