

Digital Health Strategy Monitor

Edition 03

Coverage period

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Executive Summary

Over the past two weeks, the digital health ecosystem continued to evolve toward a more mature and infrastructure-driven market. Investment activity remained focused on clinically relevant solutions, particularly in digital therapeutics, AI-enabled clinical infrastructure, and remote monitoring technologies.

Three structural shifts are visible in this reporting period:

1. **Digital therapeutics continue attracting targeted investment**, especially where clinical impact and scalability are demonstrated.
2. **AI is increasingly embedded in pharmaceutical R&D infrastructure**, particularly in clinical trial design and execution.
3. **Remote monitoring and digital devices are expanding into preventive healthcare**, addressing population health challenges such as aging demographics.

Together, these trends reinforce the broader transition of digital health from experimental consumer applications toward **core infrastructure supporting healthcare systems and life sciences innovation**.

1. Funding & Capital Markets

Digital Therapeutics Investment

European digital health company **nyra health** raised **€20 million in Series A funding** to expand its AI-based neurotherapy platform for stroke rehabilitation and cognitive disorders.

The platform focuses on digital rehabilitation for neurological conditions including stroke and dementia, combining machine learning algorithms with personalized therapy protocols.

The funding will primarily support:

- Clinical expansion across European healthcare providers
- Development of home-based therapy solutions
- Further AI development for cognitive rehabilitation programs

Neurological conditions represent a major healthcare burden. In Germany alone, stroke and dementia generate an estimated **€65 billion in annual economic impact**, highlighting the demand for scalable therapeutic solutions.

Strategic interpretation

This investment illustrates an ongoing investor preference for digital health solutions that demonstrate:

- Clear clinical applications
- Measurable therapeutic outcomes
- Integration with existing care pathways

Digital therapeutics addressing neurological and chronic conditions remain particularly attractive due to the scale of unmet medical need.

Health Technology Venture Funding

Additional venture funding activity was observed in companies developing AI-enabled healthcare platforms.

Examples include:

Sage

Raised **\$65 million** to expand its technology platform focused on senior care and long-term care coordination.

UnityAI

Raised **\$8.5 million** to develop AI-driven analytics tools designed to improve healthcare system decision-making and clinical workflow optimization.

These investments highlight growing demand for technologies that support healthcare providers in managing aging populations and improving operational efficiency.

Strategic interpretation

Investment capital is increasingly directed toward solutions that address structural healthcare challenges such as:

- Aging populations
- Workforce shortages
- Healthcare system productivity
- Data-driven clinical decision support

AI-enabled platforms that support healthcare providers rather than replace them are gaining particular traction among investors.

2. Digital Health in Clinical Research

Digital health technologies are becoming increasingly integrated into pharmaceutical research and development processes.

One notable development is the expansion of partnerships involving **Evinova**, the digital health platform created by AstraZeneca. Evinova focuses on digital tools designed to improve clinical trial design and execution.

Recent collaborations aim to deploy AI-enabled tools for:

- Clinical trial protocol optimization
- Automated documentation and reporting
- Data benchmarking across studies
- Trial site selection and patient recruitment

These technologies aim to address long-standing inefficiencies in clinical research, where trial design complexity and patient recruitment challenges often lead to delays and increased costs.

Strategic interpretation

Digital health is increasingly transitioning into **clinical infrastructure for life sciences companies**.

Key opportunities include:

- AI-driven trial design
- decentralized and hybrid clinical trials
- digital endpoints and real-world data integration

As pharmaceutical companies seek to accelerate development timelines and reduce trial costs, digital health technologies are likely to become standard components of clinical research workflows.

3. Remote Monitoring & Digital Care Devices

Innovation in remote patient monitoring and wearable healthcare technology continues to expand.

Recent developments include new device concepts designed to improve patient safety and preventive care, such as **smart insoles capable of detecting gait instability and predicting fall risk in elderly patients**.

Falls among older adults represent one of the most significant drivers of hospital admissions and healthcare costs worldwide. Technologies capable of detecting mobility changes early could allow healthcare providers to intervene before injuries occur.

Remote monitoring solutions are also increasingly being designed for integration into broader digital health ecosystems, allowing healthcare providers to combine wearable data with electronic health records and telemedicine platforms.

Strategic interpretation

Remote monitoring is gradually shifting toward **preventive healthcare applications** rather than purely reactive monitoring.

The next generation of digital health devices is expected to focus on:

- early risk detection
- population health management
- integration with telehealth services

These technologies have the potential to significantly reduce healthcare costs while improving patient outcomes.

4. Global Digital Health Infrastructure

Digital health is also evolving at the healthcare system level, with technology companies increasingly collaborating with governments and health systems to develop digital infrastructure platforms.

A recent example is the collaboration between **Fujitsu and DT-Axis**, which aims to develop digital health platforms supporting healthcare data integration and advanced analytics.

The partnership focuses on enabling:

- secure healthcare data exchange
- digital health ecosystem development
- AI-driven health data analytics

National healthcare systems are increasingly exploring digital platforms capable of connecting hospitals, physicians, and patients through unified digital infrastructure.

Strategic interpretation

Healthcare systems worldwide are investing in **digital backbone infrastructure** capable of supporting data-driven healthcare delivery.

Key focus areas include:

- national health data platforms
- interoperability between care providers
- AI-driven health system analytics

Digital health companies capable of supporting these infrastructure initiatives may experience significant long-term growth opportunities.

5. Strategic Outlook (Next 30–90 Days)

Looking ahead, several trends are expected to shape the digital health market in the coming months.

Continued growth in digital therapeutics

Solutions targeting neurological conditions, chronic diseases, and mental health are likely to remain key areas for investment and clinical adoption.

Expansion of AI in healthcare workflows

Artificial intelligence will continue to expand across healthcare system operations, particularly in clinical decision support, workflow automation, and research infrastructure.

Integration of remote monitoring technologies

Remote monitoring solutions will increasingly integrate with telemedicine platforms and electronic health records, creating more comprehensive digital care ecosystems.

Growing importance of healthcare data platforms

Healthcare providers and governments will continue exploring national and regional digital infrastructure capable of supporting interoperable, data-driven healthcare delivery.

Conclusion

Digital health is entering a new phase of maturity.

The market is shifting away from isolated consumer health applications toward technologies that function as **core infrastructure for healthcare delivery, clinical research, and health system management**.

Companies capable of delivering clinically validated solutions that integrate seamlessly into healthcare workflows are likely to be the primary beneficiaries of this transition.

As healthcare systems continue to modernize, digital health technologies will increasingly play a central role in enabling scalable, efficient, and data-driven care.

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