

IDC MarketScape

IDC MarketScape: Europe, Middle East, and Africa Healthcare Data Platforms for Providers 2025 Vendor Assessment

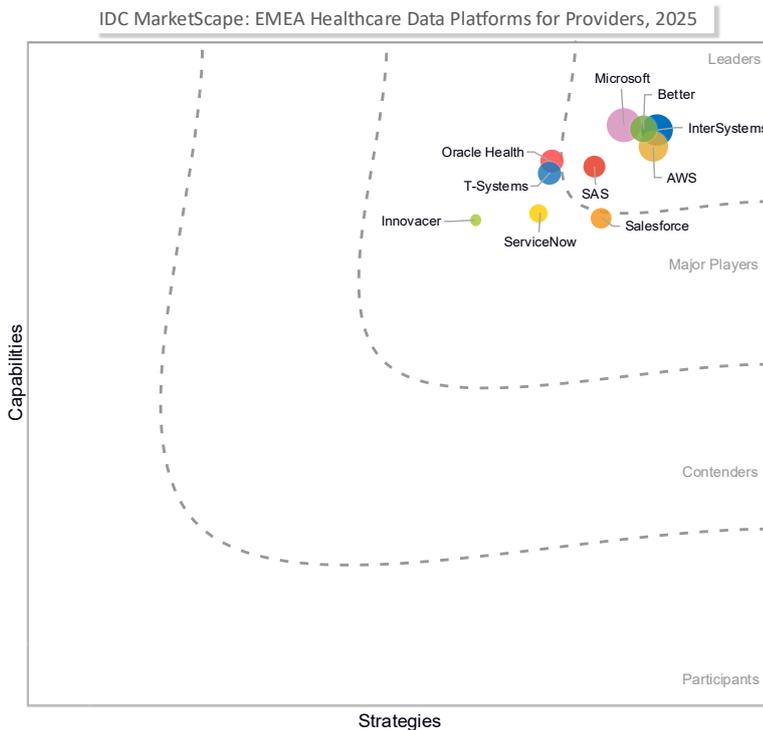
Silvia Piai

THIS EXCERPT FEATURES INTERSYSTEMS AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape: Europe, Middle East, and Africa Healthcare Data Platforms for Providers 2025 Vendor Assessment



Source: IDC, 2025

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Europe, Middle East, and Africa Healthcare Data Platforms for Providers 2025 Vendor Assessment (Doc # EUR150494623).

IDC OPINION

Health data platforms have become essential for healthcare providers across the Europe, Middle East, and Africa (EMEA) region aiming to modernize operations, enhance care quality, and quickly adapt to evolving regulatory and market demands. Once considered a “nice-to-have” innovation, they are now a strategic asset for organizations looking to thrive amid disruption and policy changes.

Modern platforms leverage a multi-layered architecture to address diverse healthcare needs:

- **Distributed Data Plane:** Facilitates broad data aggregation, integrating data from sources ranging from electronic health records (EHRs) to wearables.
- **Data Control Plane:** Secures data flows, ensures privacy, and enforces compliance with regulations such as GDPR, NIS 2, and national rules.
- **Business Capabilities Toolkit:** Powers custom clinical workflows, advanced analytics, digital front doors, and emerging use cases, including those utilizing generative AI (GenAI) and digital twins.

Healthcare provider organizations in EMEA often face resource constraints, making strategic technology investments challenging. The most effective health data platforms optimize data usability, enhance operational efficiencies, and provide a foundation for innovation, rather than simply adding new tools to existing systems. As the region navigates the shift to integrated care, workforce shortages, cyberthreats, and ongoing technological disruptions, platforms must enable seamless integration, reduce redundancies, and enhance both organizational reactivity and predictivity.

According to IDC's *Healthcare Providers Survey, 2025*, health data platforms rank among the top 3 solutions EMEA providers plan to invest in over the next two years (38.5%). These platforms are sought not only for integration but also to enable AI-driven, proactive, and scalable solutions, including digital twins, advanced analytics, connected health, and patient relationship management.

As EMEA moves toward comprehensive care transformation, these platforms are central to provider innovation, driving priority initiatives like unified, 360-degree patient views, embedding intelligent automation and decision support into workflows, accelerating virtual care, and integrating with community health and social services.

However, these ambitions will remain unfulfilled unless platforms address the complex challenges posed by local regulations, data sovereignty, security, and workforce skill gaps. IDC research highlights that platforms must excel in modularity, integration, data governance, and flexibility in adapting quickly to evolving policy requirements.

Key Findings from Research

What Do EMEA Health Data Platform Vendor Leaders Have in Common?

Frontrunners in the EMEA healthcare data platform market share a set of attributes that enable them to deliver unique value to provider organizations navigating the region's diverse digital, operational, and regulatory environment.

Outstanding EMEA health data platform providers set the standard for secure, interoperable, AI-driven, and cloud-scalable solutions that enable healthcare providers to modernize, innovate responsibly, and manage complexity. These vendors excel in balancing regulatory compliance, technological innovation, operational readiness, and user adoption, providing the essential infrastructure for healthcare transformation across the region.

In greater detail, these capabilities distinguish them from the rest of the market and provide a robust blueprint for technology buyers seeking a partner for long-term success.

Interoperability and Data Orchestration Excellence

- Leaders consistently deliver modular, interoperable platforms that facilitate seamless integration of clinical, operational, and third-party data sources (EHRs, imaging, wearables, administrative systems) while supporting the diverse syntactic and semantic standards across EMEA, such as FHIR, HL7, DICOM, and national specifications.
- Leaders deliver an integrated data fabric and robust data management frameworks, dismantling legacy silos and supporting comprehensive, longitudinal views of patients, clinical workflows, and resources across the enterprise and healthcare ecosystem.

Privacy, Security, and Regulatory Mastery

- Reliable vendors prioritize privacy by design, embedding robust capabilities for GDPR compliance, advanced role-based access management, federated identity, and meticulous audit trails to safeguard data integrity.
- They employ sophisticated cybersecurity controls, either independently or through strategic partnerships, integrating automation to maintain continuous compliance and foster trust amid the dynamic regulatory environment across EMEA, making compliance seamless not a retrofit.

AI-Driven, Real-Time Analytics and Automation

- Innovative vendors drive real-time analytics, predictive insights, and intelligent workflow automation with embedded AI and machine learning engines, resulting in measurable improvements in patient care, operational efficiency, and resource optimization.
- They demonstrate a strong commitment to next-generation capabilities, such as GenAI, to support use cases like clinical documentation, decision support, and personalized patient engagement, empowering provider organizations to quickly respond to emerging needs. They also prioritize the development or adoption of AI models that ensure explainability and mitigate bias.

Cloud-Native and Scalability

- Forward-looking vendors offer cloud-native architectures with flexible hybrid deployment options, allowing provider organizations to maintain data sovereignty, optimize latency, and scale infrastructure dynamically to meet changing needs across EMEA geographies.
- Platforms support multicloud interoperability and dynamic resource management, ensuring business continuity, agility, and cost efficiency.

Ecosystem-Readiness and Open Integration

- Forward-looking vendors foster ecosystem collaboration by supporting application programming interface (API)-based integration and open standards, enabling secure data exchange with payers, government research institutions, public health agencies, and social care networks across EMEA — essential for the success of integrated care and population health models in the region.
- A vibrant partner ecosystem (including integration accelerators, consulting, and domain solutions) allows providers to extend platform capabilities rapidly and effectively.

User-Centric Design and Change Enablement

- Leaders' solutions prioritize usability across a broad range of users, including data, technical, clinical, and administrative staff, offering intuitive interfaces, embedded clinician workflows, and robust self-service analytics to drive adoption, even in digitally diverse environments.
- Leaders invest in change management, education, and support services, understanding that cultural and process transformation are just as critical as technology implementation in realizing value, especially given the varying levels of digital maturity across EMEA.

Proven Impact and Referenceability Across Customer Base

- Whether supporting an individual hospital or a regional/national health system, market leaders strengthen their platforms with robust capability

governance, quality assurance, and continuous innovation, demonstrated by industry certifications and successful large-scale deployments.

- Leaders consistently show referenceability and documented improvements in patient outcomes, operational efficiency, resilience, and compliance across their customer bases.

IDC MARKETSCOPE VENDOR INCLUSION CRITERIA

IDC leverages its unique insights into vendor selection processes in healthcare provider organizations, drawn from extensive client interactions and the continuous monitoring of healthcare industry trends. For this IDC MarketScape, IDC carefully designed the vendor inclusion criteria to ensure the inclusion of the most relevant and representative vendors operating within the EMEA healthcare data platform market for providers. The vendors in this research meet specific criteria reflecting their significance, market presence, and ability to address the unique challenges EMEA healthcare providers face.

For inclusion in this study, IDC stipulated vendors should meet the following minimum criteria:

- **Geography:** The vendor has an established corporate presence (e.g., main/branch office) in EMEA that manages or supports the sales, delivery, and implementation of health IT solutions.
- **Market:** The vendor sells the solution (e.g., healthcare data platforms for providers) in the EMEA health IT market.
- **Vertical:** The vendor delivers the solution (e.g., healthcare data platforms for providers) to healthcare provider organizations.
- **Offering:** The vendor provides a healthcare data platform.
 - **Definition:** IDC defines a healthcare data platform as “a modern, cloud-based environment that offers seamless integration, extensibility, and orchestration of health information and data.”
 - **Function:** Healthcare data platforms deliver modular, scalable solutions, providing integrated capabilities that cater to digital experiences in compliance with healthcare regulations. Typically, healthcare platforms integrate various applications with platform-as-a-service (PaaS) capabilities and real-time data processing to scale, adapt, and drive clinical, operational, and administrative healthcare functions.
 - **Description:** Healthcare platforms typically consist of three core layers:
 - **Distributed Data Plane:** Collects and integrates data from various sources, including clinical and operational healthcare applications, third-party solutions, and connected devices.
 - **Data Control Plane:** Focuses on data governance, ensuring that healthcare professionals and patients interact with data safely and

comply with GDPR and new regulations such as the European Health Data Space (EHDS) framework.

- **Business Capabilities and Orchestration Toolkit:** Leverages clinical applications and health data to develop new functionalities and patient care solutions.

The evaluation in this IDC MarketScape uses data collected through primary and secondary research methods. Primary research includes direct company briefings, customer reference interviews, and data from participating vendors. Secondary research includes publicly available information such as company filings, press releases, official websites, and other reputable sources. IDC collected and reviewed research data for vendors in this study through January 2025.

ADVICE FOR TECHNOLOGY BUYERS

Technology buyers can leverage this IDC MarketScape study to make informed decisions when selecting healthcare data platforms in the EMEA region. The report offers a clear and comprehensive evaluation of available solutions and vendor capabilities, helping buyers navigate a market where the definition of “platform” often varies. By applying a rigorous and balanced assessment framework, IDC enables buyers to identify platforms that best align with both their immediate operational needs and longer-term strategic goals.

This study takes a forward-looking approach, examining how vendors are evolving their platforms to meet the changing needs of healthcare providers across EMEA. It emphasizes the importance of selecting solutions that address current challenges while remaining flexible and innovative to adapt to future changes. Ultimately, this IDC MarketScape provides technology buyers with the insights needed to connect, scale, and transform their organizations, ensuring they choose a platform that will redefine healthcare delivery both now and in the future.

Selecting, deploying, and scaling a health data platform in EMEA demands a strategically rigorous approach. IDC recommends the following priorities:

Align Investment to Strategic Goals and Use Cases

- Anchor your initiative to clear business and clinical objectives, such as patient access, operational efficiency, agile regulatory response, or improved care quality.
- Define measurable key performance indicators (KPIs) up front, including improved care outcomes, faster reporting, reduced redundancies, or enhanced collaboration across stakeholders.

Demand High Standards for Interoperability and Integration

- Ensure native support for FHIR, HL7, DICOM, and major EHR/clinical systems. The platform should streamline, not complicate, integration and communication across multiple systems, including with external partners.
- Avoid vendor lock-in by prioritizing platforms that support modular and extensible architectures.

Prioritize Security, Privacy, and Compliance by Design

- Ensure end-to-end encryption, strict identity management, continuous threat monitoring, and real-time, automated compliance with GDPR, NIS 2, and national regulations.
- Choose platforms with granular tools for managing patient permissions and transparent handling of cross-border data flows.
- Demand proof of regulatory certifications (ISO 27001, national certifications) and clear terms around data ownership and control.

Embrace AI and Cloud-Hybrid Flexibility

- Select platforms with embedded AI analytics and workflow automation, designed for both clinicians and non-technical users.
- Favor solutions that offer cloud scalability while maintaining on-premises or hybrid flexibility to address EMEA's data sovereignty and workload needs.

Plan for the Human Dimension

- Invest in change management and training to upskill staff and engage stakeholders early, ensuring smooth user adoption and optimized workflows.
- Foster a mindset where users see the platform as a tool for ongoing improvement rather than just a one-time change. Establish a feedback loop to refine workflows, address challenges, and adapt the system to meet the organization's evolving needs.

Plan for Incremental, Value-Driven Rollout with a Long-Term Vision

- Implement a phased deployment, starting with high-value use cases, demonstrating measurable results, and expanding platform reach iteratively.
- Budget comprehensively for implementation, integration, migration, and ongoing support — beyond just software licenses.
- Establish strong data governance and a multidisciplinary steering group to align technical, clinical, and compliance priorities from the outset.

- Ensure the rollout is guided by a long-term vision rooted in clinical outcomes and organizational strategy, so that results remain organic, coherent, and sustainable over time.

Vet Vendors for Innovation, Partnership, and Vision

- Assess vendor road maps for continuous advancements in interoperability, AI, security, and ecosystem connectivity.
- Prioritize providers with regional EMEA experience, strong customer references, and a proven ability to support local deployments, alongside trusted local partners.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and opportunities.

InterSystems

InterSystems is positioned in the Leaders category of this 2025 IDC MarketScape for EMEA healthcare data platforms for providers.

Founded in 1978 and based in Boston, Massachusetts, InterSystems has grown into a global player specializing in high-performance data management, interoperability, and real-time analytics. Its platforms are deployed in over 80 countries, managing more than a billion health records, and powering major systems like Epic EHR. Strategic cloud partnerships with AWS, Google Cloud, and Microsoft Azure have further strengthened its global reach and cloud-native capabilities.

In EMEA, InterSystems is deeply embedded in national and regional health infrastructures, enabling longitudinal health records, connected care models, and opening avenues for AI-driven clinical innovation. Its strong customer base includes National Health Service (NHS) trusts in the U.K., regional and national EHR initiatives in Italy, Scotland, France, and the Middle East, and prominent academic medical centers across Germany, Spain, and the Netherlands. The core of its offering, InterSystems IRIS for Health, powers a growing ecosystem of proprietary tools, third-party apps, and customer-led innovations, supporting better-informed clinical and operational decision-making. Its go-to-market model emphasizes a collaborative, consultative approach: it partners closely with healthcare organizations to tailor solutions that address local regulations and specific environments, ensuring scalable and effective deployment across diverse systems.

Platform

InterSystems IRIS for Health, introduced in 2018, is a purpose-built digital health platform built to manage healthcare data complexity at scale. It features a high-speed translytical multi-model data engine that unifies transactional and analytical workloads to enable real-time analytics, AI-driven insights, and rapid decision-making in mission-critical environments such as large hospitals and research organizations.

The platform is used by its customers to create data fabrics that connect (via data virtualization) and collect (via persistent storage) information from disparate sources, delivering a trusted single source of truth. In June 2024, the introduction of Data Fabric Studio, a low-code tool, enhanced data governance and integration, making it ideal for personalized medicine and large-scale public health analytics.

Performance is optimized through the Enterprise Cache Protocol (ECP), which enables a distributed cache across horizontally scalable application servers, ensuring data integrity, transactional consistency, and resilience even under high concurrency and peak loads. The platform also ensures consistent data integrity across extensive patient populations through the common multimodal data plane, supporting relational, document, and object data without duplication and facilitating high-speed harmonization across large-scale deployments.

Modularity is built-in: add-on applications such as Personal Community (digital front door), Care Community (multidisciplinary care planning), and Patient Index / EMPI are available from the InterSystems HealthShare portfolio. HealthShare also includes the Unified Care Record (UCR), a longitudinal health record capability. These modules streamline frontline collaboration, patient engagement, and identity resolution. The platform continues to evolve to meet regulatory standards for data governance and interoperability, balancing compliance with performance and efficiency.

Interoperability capabilities include seamless support for HL7 v2, FHIR, CDA, IHE, X12, DICOM, and NCPDP. A built-in FHIR server and the FHIR SQL Builder simplify data exchange and prepare data for real-time analytics. Native AI features include vector search, embedded Python, PMML, IntegratedML, and retrieval-augmented generation workflows to support GenAI and advanced use cases like genomic analysis. Available on AWS, Azure, and GCP, it supports containerized, multitenant cloud or hybrid deployments, offering flexibility for diverse healthcare IT environments.

Strengths

- **Interoperability Leadership:** InterSystems supports a broad range of healthcare interoperability standards — from HL7 v2/v3 and CDA to DICOM, X12, IHE profiles, and FHIR — that enable robust cross-organizational data sharing. The additional HealthShare platform allows customers to create

comprehensive longitudinal records, powering real-time data exchange and event-driven alerts (e.g., automated admission/discharge notifications) that are essential for clinical coordination and integrated care systems. It integrates with major clinical information systems and supports regional and local standards such as Germany's eFA/NFD. With built-in modules for advanced case management and predictive analytics, IRIS for Health enables holistic, event-driven interoperability that extends far beyond basic data exchange.

- **Scalable, Cloud-Native Architecture with GenAI Readiness:** IRIS for Health supports full-cloud (AWS, Azure, GCP), hybrid, and on-premises deployments, meeting EMEA data sovereignty requirements. Its Common Data Plane and Enterprise Cache Protocol enable horizontal scaling with synchronized distributed caching, real-time translytical processing, vector search, and built-in GenAI orchestration, without data duplication or latency.
- **Trusted for Mission-Critical, Large-Scale Healthcare Deployments with Enterprise-Grade Security:** IRIS for Health is adopted by major national and regional public health systems across EMEA and beyond, delivering high throughput, strong interoperability, and full regulatory compliance. Its resilient, horizontally scalable architecture ensures dependable performance even under heavy data loads, while embedded AI capabilities enable advanced clinical and population-health insights. A comprehensive security framework aligned with ISO 27001 and SOC-certifications embeds encryption (for data at rest and in transit), continuous monitoring, vulnerability management, incident response, auditing, and integrity checks across all layers. These features support GDPR and other regional compliance requirements, safeguarding sensitive patient data in transit and at rest, thus enabling secure healthcare data operations at scale.

Challenges

- **Complexity May Overwhelm Less Mature Organizations:** While highly customizable, IRIS for Health's rich and sophisticated architecture can pose a steep learning curve for small and midmarket providers in EMEA lacking extensive IT resources. The breadth of configuration options may require significant effort to tailor user experiences, and those seeking preconfigured "out-of-the-box" solutions may find it challenging to deploy without additional automation tools. Simplified deployment packages and enhanced regional SI partnerships could improve accessibility and adoption among less mature healthcare organizations.
- **Limited Brand Visibility Despite High-End Reputation:** IRIS for Health often works behind the scenes powering front-end systems, making it less visible to end users. As a result, in competitive bids, especially against EHR-anchored platforms or hyperscalers, its strategic value may be overlooked. However, in the high-end market segment it remains highly regarded for its deep technical prowess and mission-critical reliability.

Consider InterSystems When

Organizations facing complex challenges in data integration, interoperability, and AI adoption will find InterSystems to be a strong fit. It is particularly well suited for national and regional health systems, integrated care organizations, research-intensive hospitals, and large health information sharing systems across Europe and the Middle East. InterSystems offers a mature, standards-based multimodal architecture that supports real-time, scalable processing of diverse healthcare data. Its advanced AI capabilities further enhance its value proposition. To fully realize the platform's potential, organizations should invest in expert-led deployment, either through skilled internal teams or experienced local systems integrators. This ensures tailored configurations, streamlined implementation, and alignment of technical execution with broader strategic health objectives.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis or strategies axis indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represent the market share of each individual vendor within the specific market segment being assessed.

This IDC MarketScape evaluates vendors in the EMEA healthcare data platform market for providers, analyzing their strategies and capabilities in delivering value within a complex and rapidly evolving landscape. The study offers actionable insights for technology buyers looking to leverage healthcare data platforms to address the unique operational, clinical, and regulatory challenges faced by healthcare organizations across EMEA.

This study redefines how technology buyers evaluate healthcare data platform vendors by offering a dynamic and comprehensive view of the competitive landscape. Unlike traditional rankings, the IDC MarketScape combines deep subject matter expertise with a robust research framework, including detailed vendor RFIs, in-depth briefings, solution demonstrations, customer interviews, and other critical data, providing unparalleled insights into both current capabilities and future strategies.

For technology buyers, this analysis serves not as a ranking, but as a strategic guide, helping to navigate market complexities and make informed decisions on solutions that align with organizational goals and the evolving market dynamics.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores and, ultimately, vendor positions on the IDC MarketScape on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

IDC defines a healthcare data platform as “a modern, cloud-based environment that offers seamless integration, extensibility, and orchestration of health information and data.” These solutions deliver modularity and scalability to support clinical, operational, and administrative workflow functions while ensuring compliance with healthcare regulations. They are typically composed of three core architectural layers: the distributed data plane, which aggregates and integrates data from diverse sources, including clinical systems, third-party applications, and connected devices; the data control plane, which governs and secures data interactions while ensuring compliance with regulations such as GDPR; and the business capabilities and orchestration toolkit, which facilitates the development of new functionalities and patient care solutions by leveraging integrated clinical applications and health data.

LEARN MORE

Related Research

- *Convenient Access to Care in 2025: Global Insights and Strategic Actions* (IDC #EUR153563325, July 2025)

- *IDC PlanScape: Healthcare Data Platforms for Providers* (IDC #US52875525, March 2025)
- *IDC MarketScape: U.S. Healthcare Data Platform for Providers 2024–2025 Vendor Assessment* (IDC #US50494523, December 2024)
- *IDC TechBrief: Healthcare Data Platforms* (IDC #EUR151908223, March 2024)

Synopsis

This IDC study evaluates vendors delivering healthcare data platforms for providers across the EMEA region, assessing their strategies and capabilities. IDC defines these platforms as “modern, cloud-based environments that seamlessly integrate, orchestrate, and enable the intelligent use of health information.” These platforms go beyond traditional data management, providing a solid foundation for advanced interoperability, data-driven decision-making, and data excellence. Designed to support key initiatives such as AI-powered workflows, hyper-personalized patient engagement, and integrated care delivery, healthcare data platforms shift the focus from merely storing data to leveraging it for actionable insights and improved patient outcomes.

“EMEA is entering a phase where leading organizations are harnessing platform architecture not just to modernize, but to fundamentally reinvent care delivery models at scale. Those that hesitate to adopt these platforms risk falling behind as they face increasing regulatory pressure, rising cyber risks, and the operational challenges of data lock-in. The cutting edge of the EMEA health data platform market lies in the ability to operationalize innovation responsibly, aligning with diverse local requirements and delivering smarter, faster solutions that legacy systems simply cannot match.” — Silvia Piai, research director, IDC Health Insights

ABOUT IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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