



Forum MedTech Pharma e.V.
Dr. Jörg Traub

Market Access Pathways

Nov 14, 22 – GTAI @MEDICA

Medical Technology in Bavaria – Best Practice from our Cluster

AKTORMED GMBH : SOLOASSIST - How can we provide the surgeon a 3rd arm?

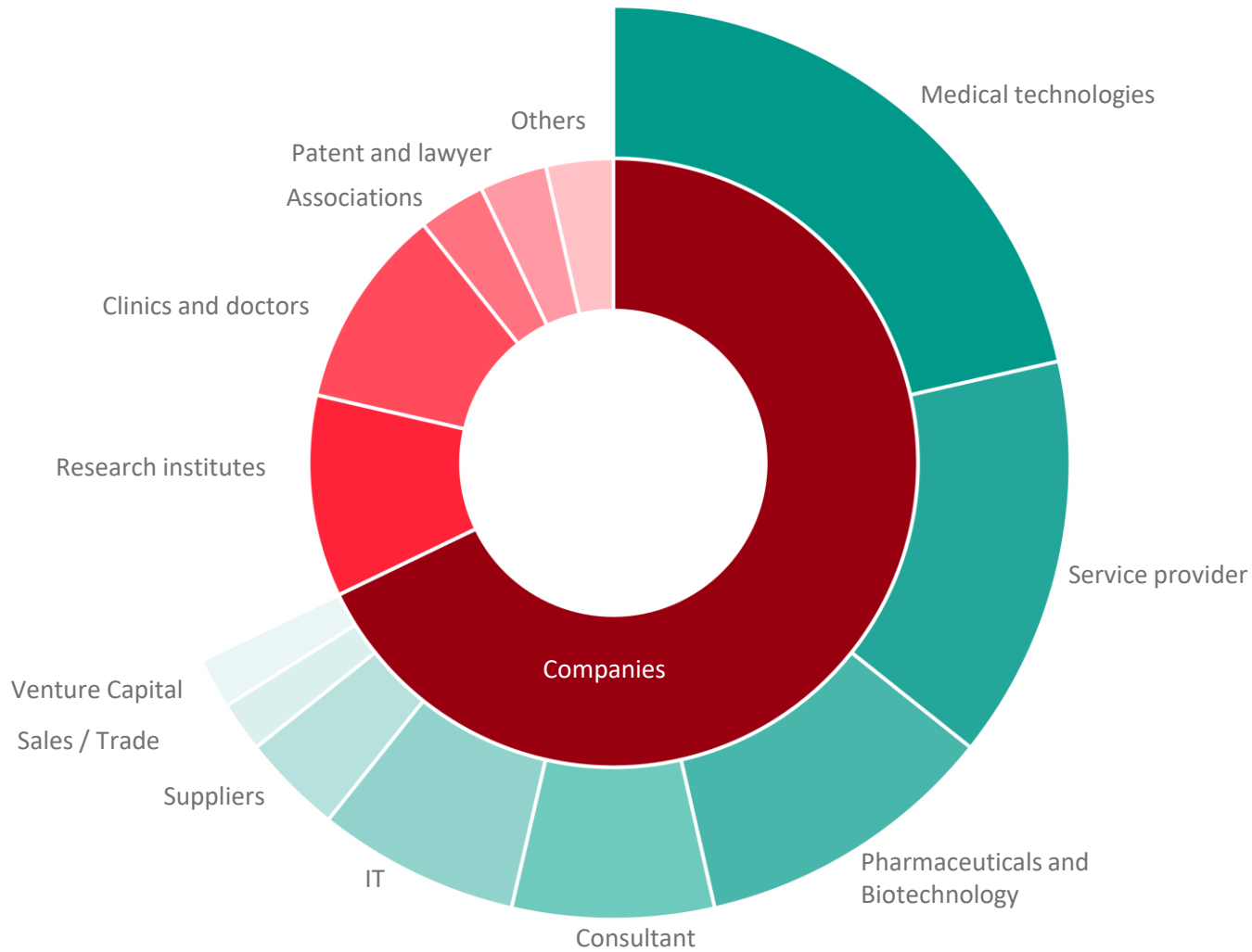


Bildquelle: Fotolia@pointstudio_Montage + Aktormed

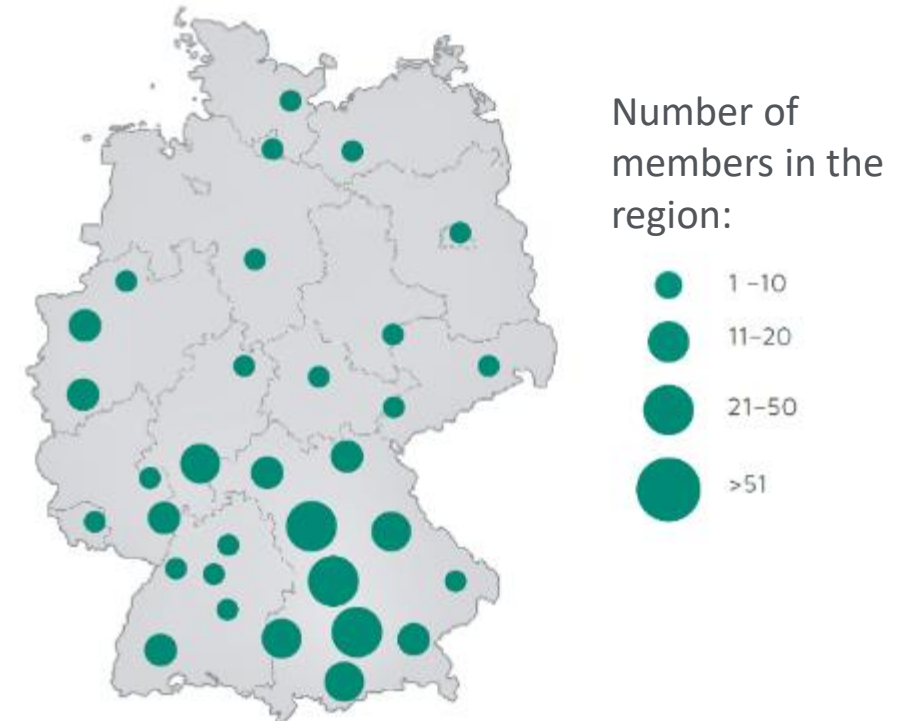


Forum MedTech Pharma e.V, Innovation Think Tank in Partnership with Bayern Innovativ

Membership structure of the Forum Medtech Pharma e.V. association



Member locations in Germany



Further countries

Austria, Belgium, Croatia, Denmark, Greece, India, Japan, Netherlands, Slovenia, Switzerland, United Kingdom, USA

Our team of health & care innovation experts



Dr. Jörg Traub
Managing Director



Raphaela Wallner
Innovation in Care



Dr. Frank Miermeister
Regulation & Medical Device



Stefanie Brauer
Supplier & Sustainability



Julia Ott
Advanced Therapy & Start-Up



Christine Twete-Dietrich
Member & Office Management



Jürgen Frickinger
Medical Electronics & IT



Jennifer Meschnig
Marketing & Events



Sandra Karakaya
Press & Public Relations



Lena Kastner
Technology & Funding

Interested to shape the healthy future together? Your access paths!



Join as a member ([registration form](#))



Shape with us the future ([contact to the team](#))



Networking ([our members](#))



Experience innovation ([our events](#))

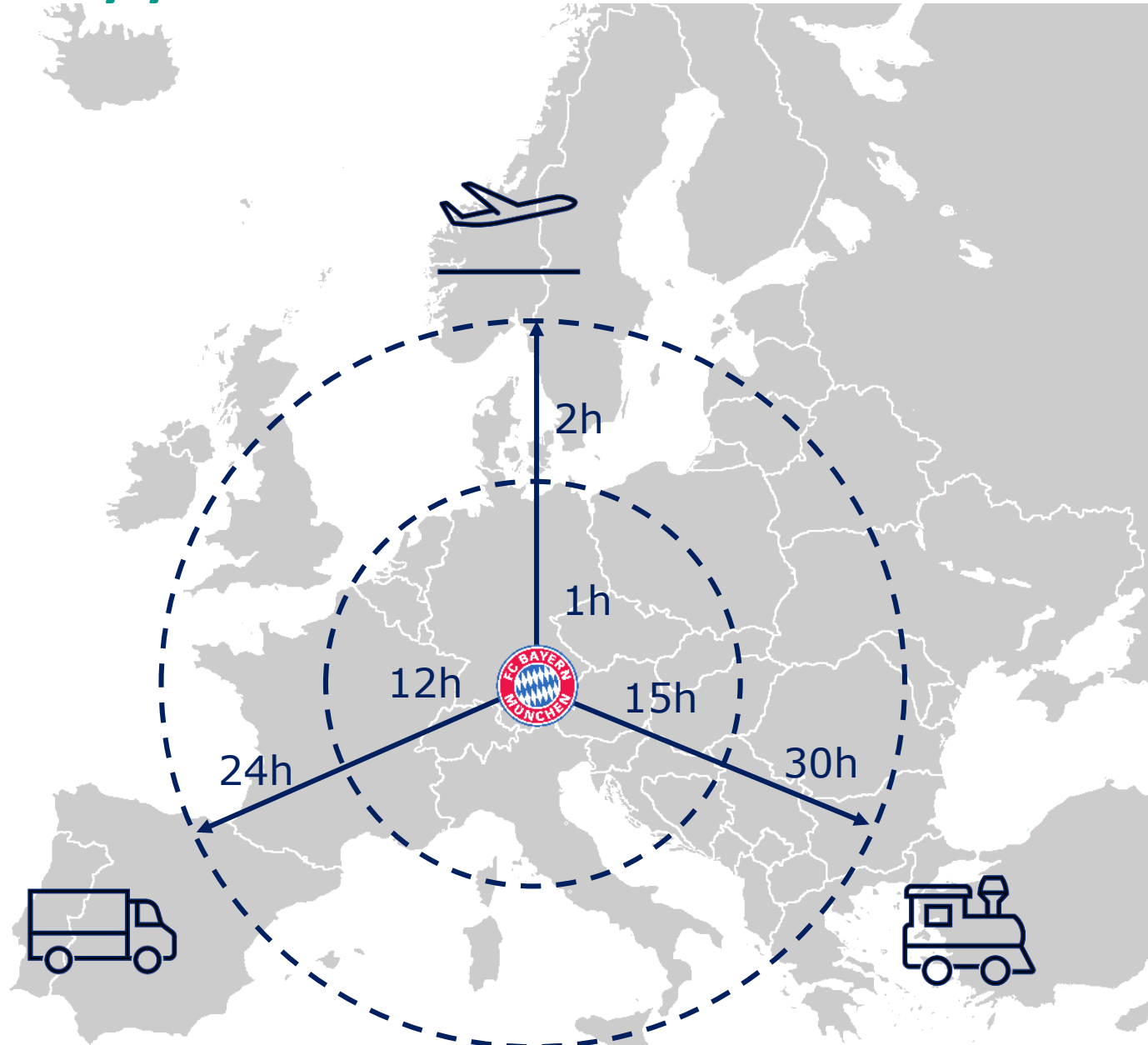


Realize innovation ([news from our network](#))

Part A

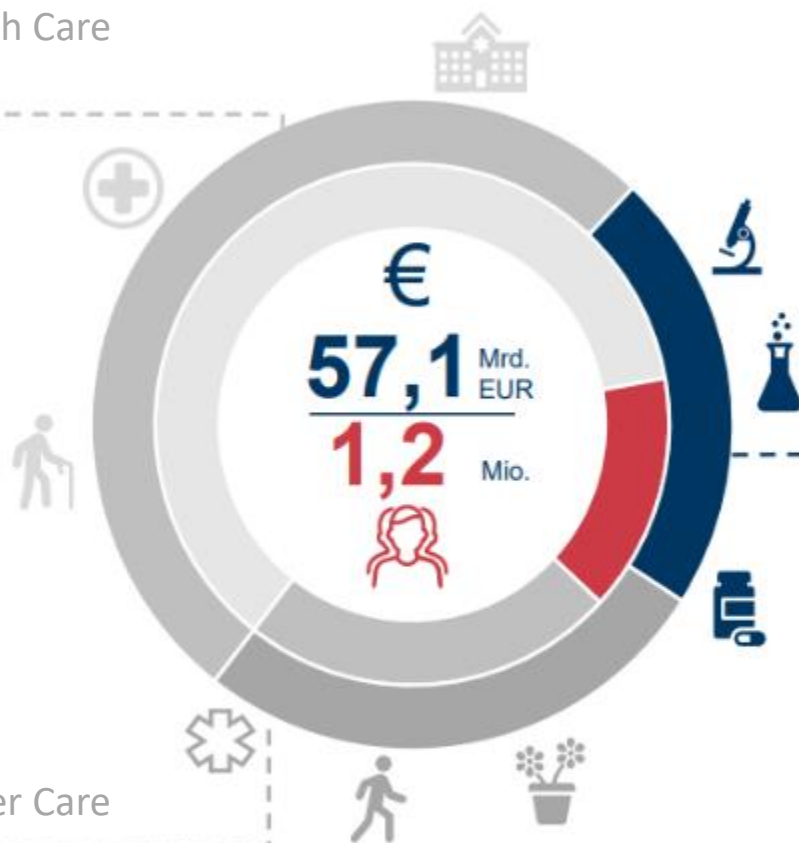
Market Analysis

New to EU? Why you should start in Bavaria?



Health Care Economy Fact Sheet Bavaria – data from 2018

Health Care



Further Care

Healthcare Industry

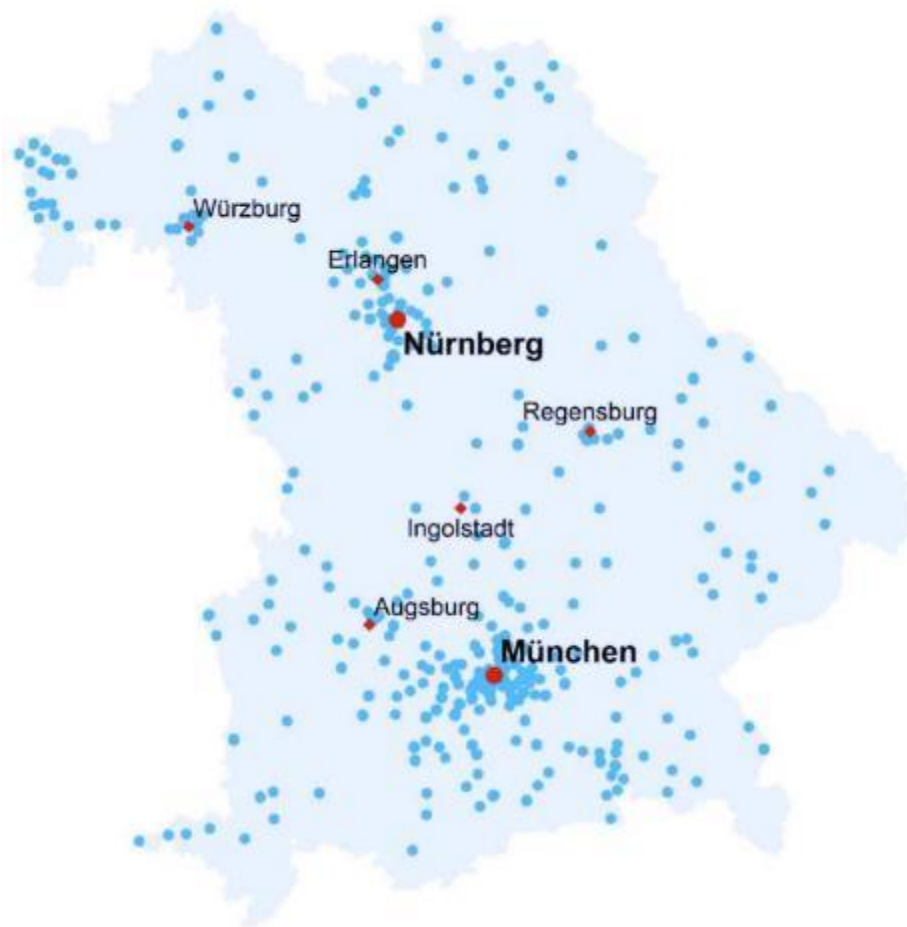
€ **12,6** Mrd. EUR
gross value
22,2%
of overall economy

5,9 %
average annual growth
2009-2018

173.000
employment
14,8%
of overall economy

2,5 %
average annual growth
2009-2018

Medical Technology in Bavaria – B2B



- **More than 3%** of the world's medical technology products are produced in Bavaria.
- ~ **1,000 companies** are active as manufacturers, suppliers and service providers for medical technology.
- The **export** of medical technology products accounts for a high proportion of total sales. Yet the most important target regions are the EU countries, the USA and China.
- Bavarian medical technology companies are very satisfied with their location. This is mostly in the area of **metropolises with high-tech environments** (Munich, Nuremberg/Erlangen).
- Advancing **digitization** and **networking** are considered important technological trends.
- The future development of the Bavarian medical technology industry is considered to be very positive.

Patient Care Infrastructure in Bavaria – B2C



~400

approved acute care
hospitals

~11.000

dentists

~58.000

physicians

~62

excellent spas and health resorts

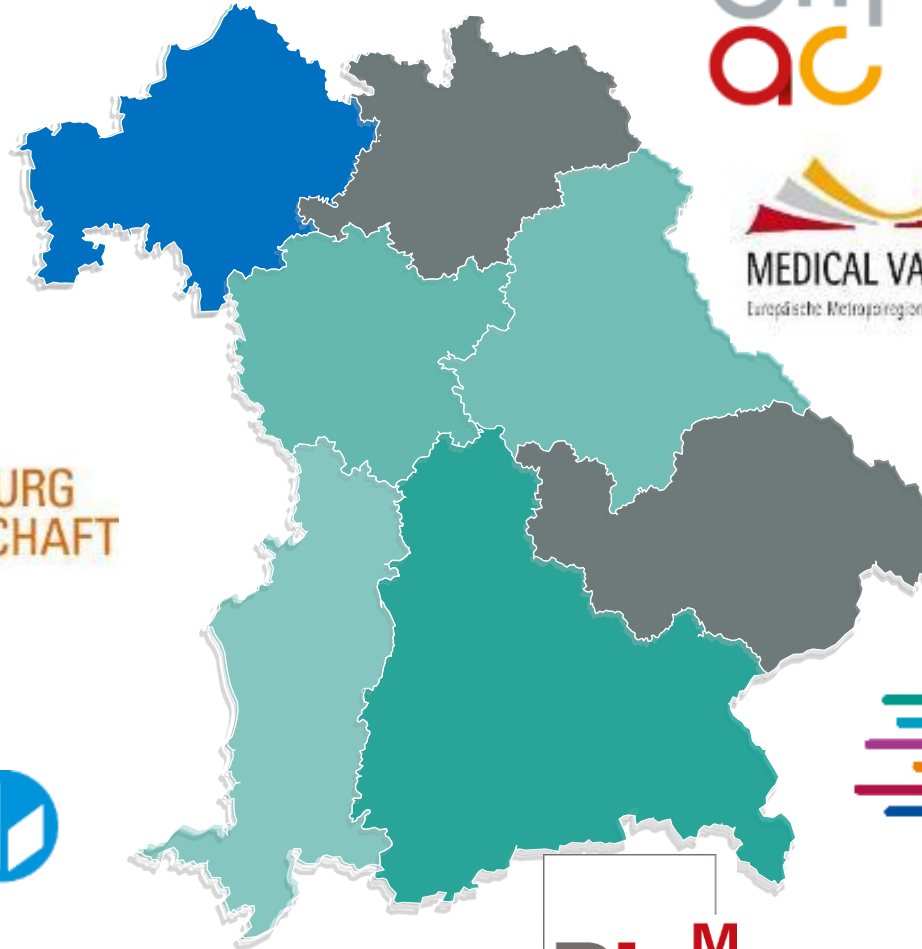
~285

preventive or rehabilitation facilities

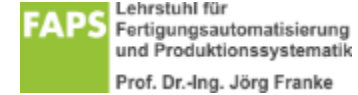
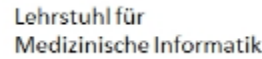
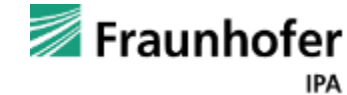
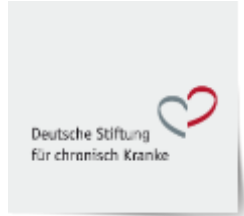
Part B

Market Access Pathways

Our Networks to support Health-Tech in Bavaria



Forum Medtech Pharma e.V. Members from University / Science



MDR / IVDR – partners from our network

- **experts in strategy and consulting services**

- Be on Quality
- Metecon
- en.co.tec
- MedIdee
- Seleon
- Requalite



- **test labs and/or specialists on norms**

- SGS
- Eurofins Product Testing
- TÜV Hessen
- M3i
- IT – Testing
- HWI group



- **entity that can take over the legal manufacturing role**

- CEYOO

- **Notified Bodies**

- DQS
- TÜV SÜD Product Services

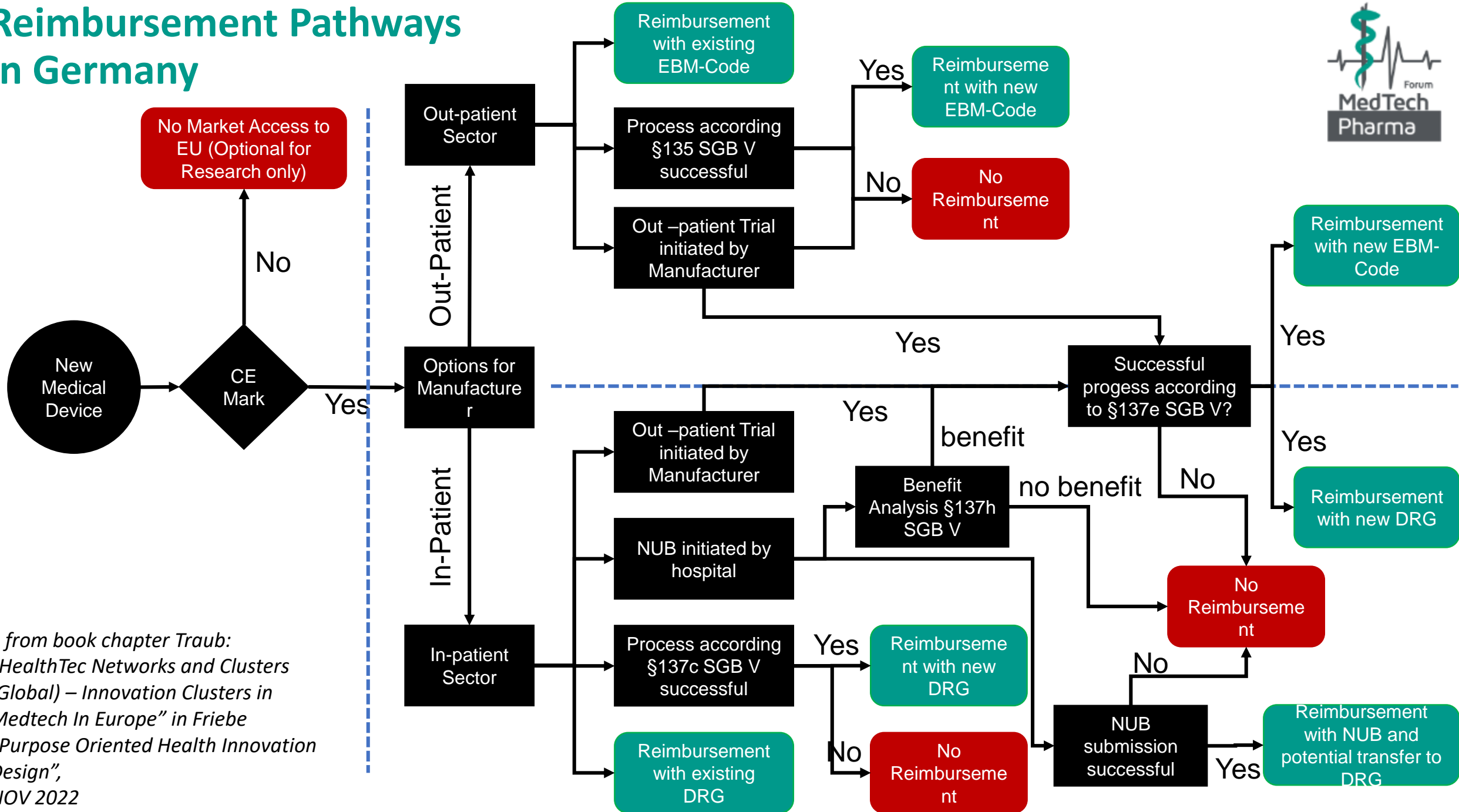


- **experts on clinical trials / clinical assessment**

- Climedo
- Novineon
- MEDICRO
- NAMSA
- MedSURV
- Trials24



Reimbursement Pathways in Germany



* from book chapter Traub: „HealthTec Networks and Clusters (Global) – Innovation Clusters in Medtech In Europe” in Friebe “Purpose Oriented Health Innovation Design”, NOV 2022

Reimbursement Pathways



1. Define your reimbursement strategy

- Do we need new reimbursement codes or can we use existing ones
- Are we addressing the stationary or ambulatory segment
- What is the best location and network



2. Understand your reimbursement requirement and associated investment

- Do we understand the user, payer and buyer
- Do we have the right partners
- Do we have an investment plan
- Are all shareholders (SME) or management (corporate) aligned



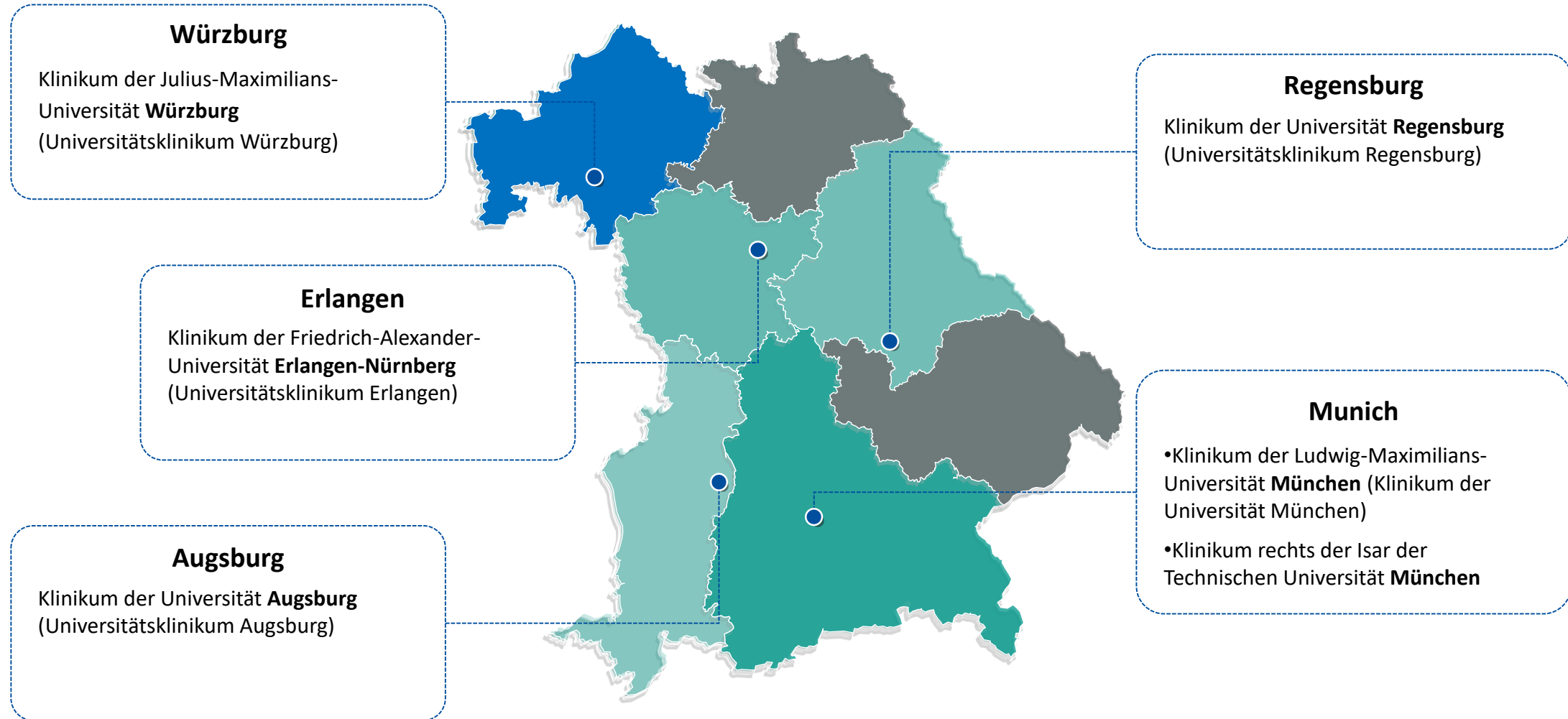
3. Work with experts in the field i.e. partners, coaches and/or consultants

- Creating files e.g. for G-BA
- Have a sound portfolio for insurance companies (103 stationary with ~73 mio members + ~50 private with < 10 mio members)
- Find the entry door and direct access

Part C

Market Entry

Excellent Clinical Research & Medical Education in Bavaria



Start with a Key Opinion Leader... ... selection from our network



Prof. Dr. Philipp Patrottka
Klinikum rechts der Isar,
Munich
Interventional Radiology



Prof. Dr. Jürgen Schüttler
FAU Klinikum Erlangen
Internal Medicine
& Clinical Director
Medical Valley



Prof. Dr. Dirk Wilhelm & Daniel Oster
Klinikum rechts der Isar & MITI Institute
Visceral Surgeon / General Surgery



Prof. Dr. Wolfgang Böcker
LMU Klinikum Munich
Trauma & Orthopedic Surgeon
& Chairman Cluster Medtech Bavaria

Forum Medtech Pharma e.V. Members from Medical Facilities



Find your way for best model for distribution



model	advantage	disadvantage
direct sales	direct feedback, highest control, highest margin	expensive and partly not possible from a regulatory point of view
local branch/subsidiary	direct control, partial disclaimer, positive image of the company	very expensive and complex, very high upfront costs and high risk
agents	inexpensive, no obligations and usually no exclusivity, no fixed costs, good market knowledge and regional network	no control, agent commission due after project completion, liability risk remains, lots of support from application specialists, high costs for market introduction
distributors/resellers	no fixed costs, long-term exclusive commitment, partial disclaimer, existing network, and regional market knowledge	no control, high distributors margin on project realization, A lot of support from application specialists

* from book chapter Traub: „Global Health markets and their different needs” from Friebe “Purpose Oriented Health Innovation Design”, NOV 2022

Find a Distribution fit ...
... with complementary interest!



Find the needle in the haystack!

„If I’m selling to you,
I speak your language.
If I’m buying,
dann müssen Sie Deutsch sprechen!“

Willy Brand - German Chancellor 1969-1974





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