

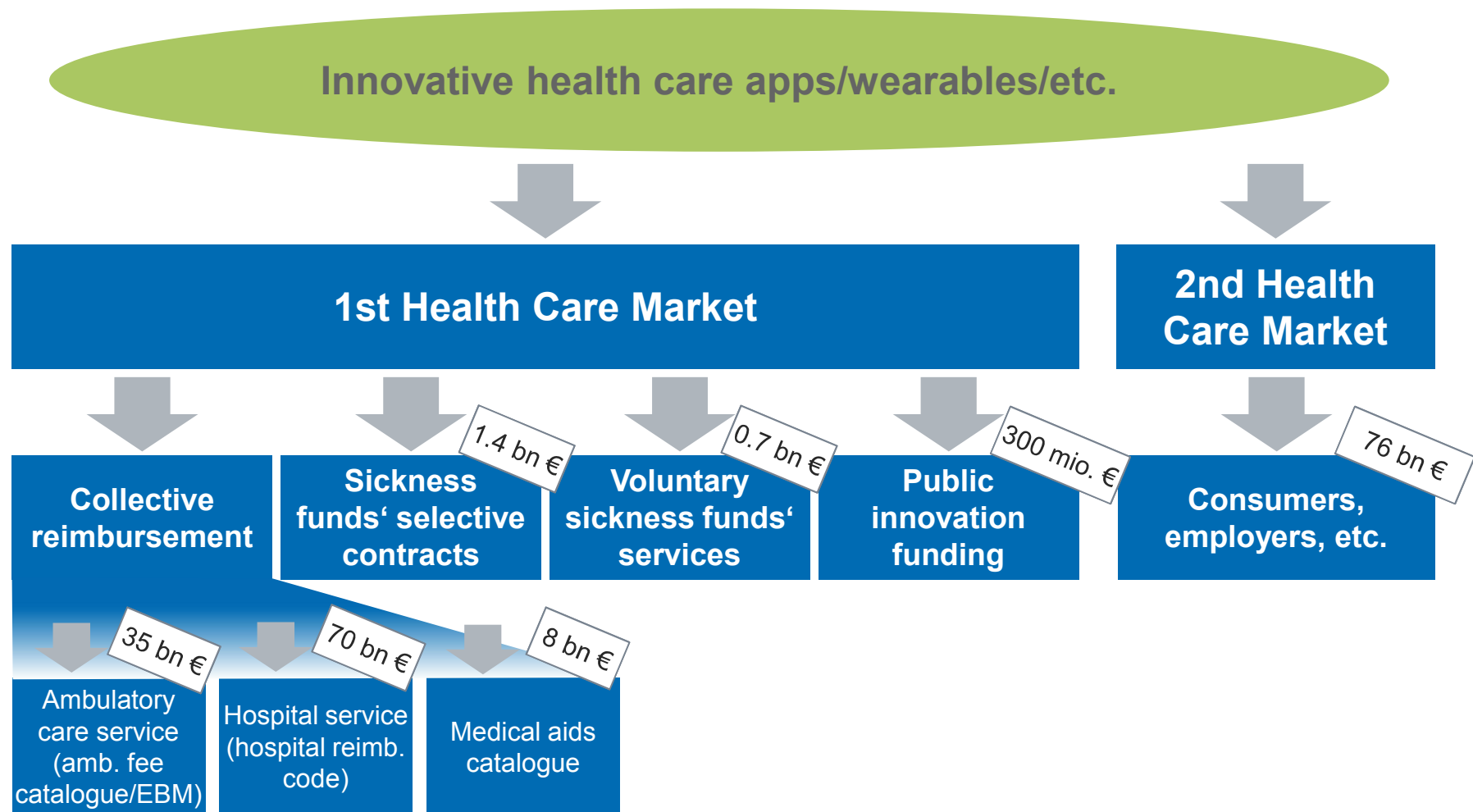
Apps and other Mobile Health Solutions

*GTAI Webinar
„Succeed in Germany’s Healthcare Market”*

Prof. Dr. Volker Amelung, President, German Managed Care Association

12 October 2016

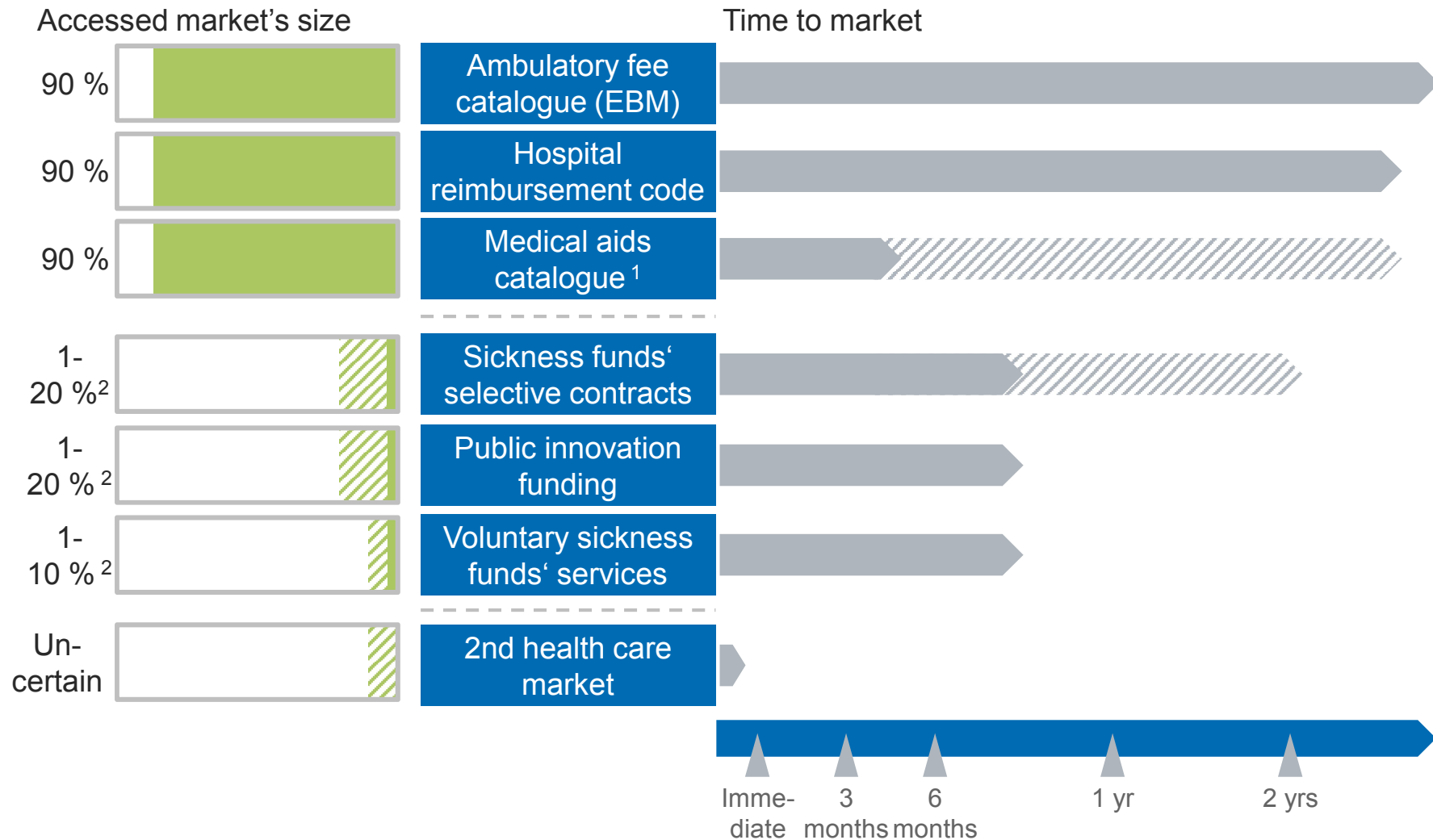
How Do Innovations Enter the German Health Care Market?



Different Market Access and Reimbursement Regulations per Instrument

	Market size	Market access	Reimbursement
Ambulatory fee catalogue (EBM)	35 bn €	Collective positive vote	Fee for service
Hospital reimbursement code	70 bn €	Immediate access unless collective negative vote	DRG / code for innovative procedures (NUB)
Medical aids catalogue	8 bn €	Sickness funds' collective positive vote	Fee per device negotiated w/ each sickness fund
<hr/>			
Sickness funds' selective contracts	1.4 bn €	Contracts with single sickness funds	Negotiated w/ each sickness fund (e.g. FFS, lump sum, etc)
Public innovation funding	300 mio. €	Public tender	Negotiated w/ participating sickness fund(s)
Voluntary sickness funds' services	0.7 bn €	Contracts with single sickness funds	Negotiated w/ each sickness fund (e.g. FFS, lump sum, etc)
<hr/>			
2nd health care market	76 bn €	Immediate access (unless medical product)	Unrestricted market pricing

Long Time to Market Correlates With Larger Market Size



3

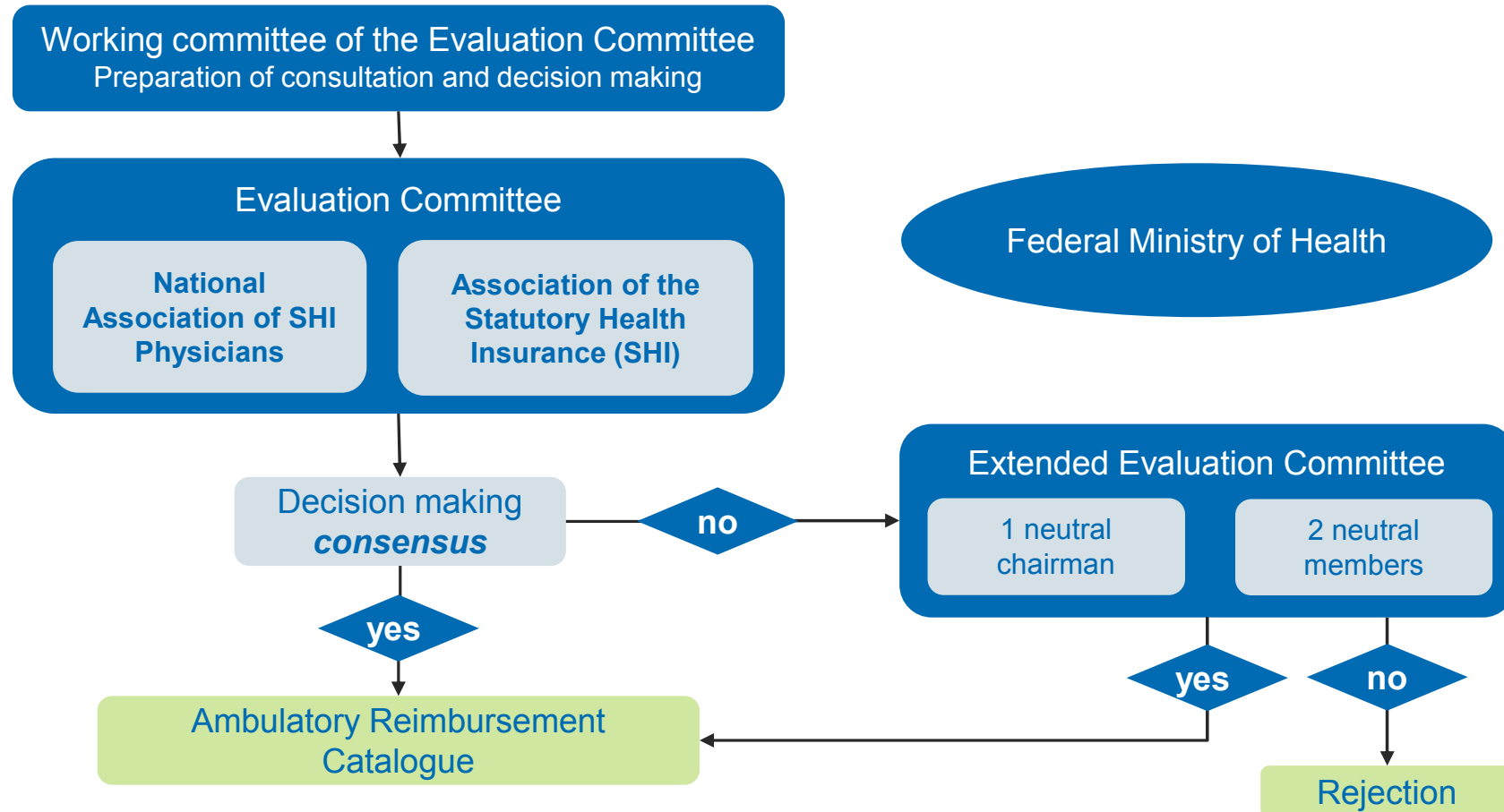
1. Time span depends on the whether or not the product category is already existent in the medicals aids catalogue.

2. Regional market share can be up to 50% per contract

The Healthcare Innovation Platform

BMC Managed Care

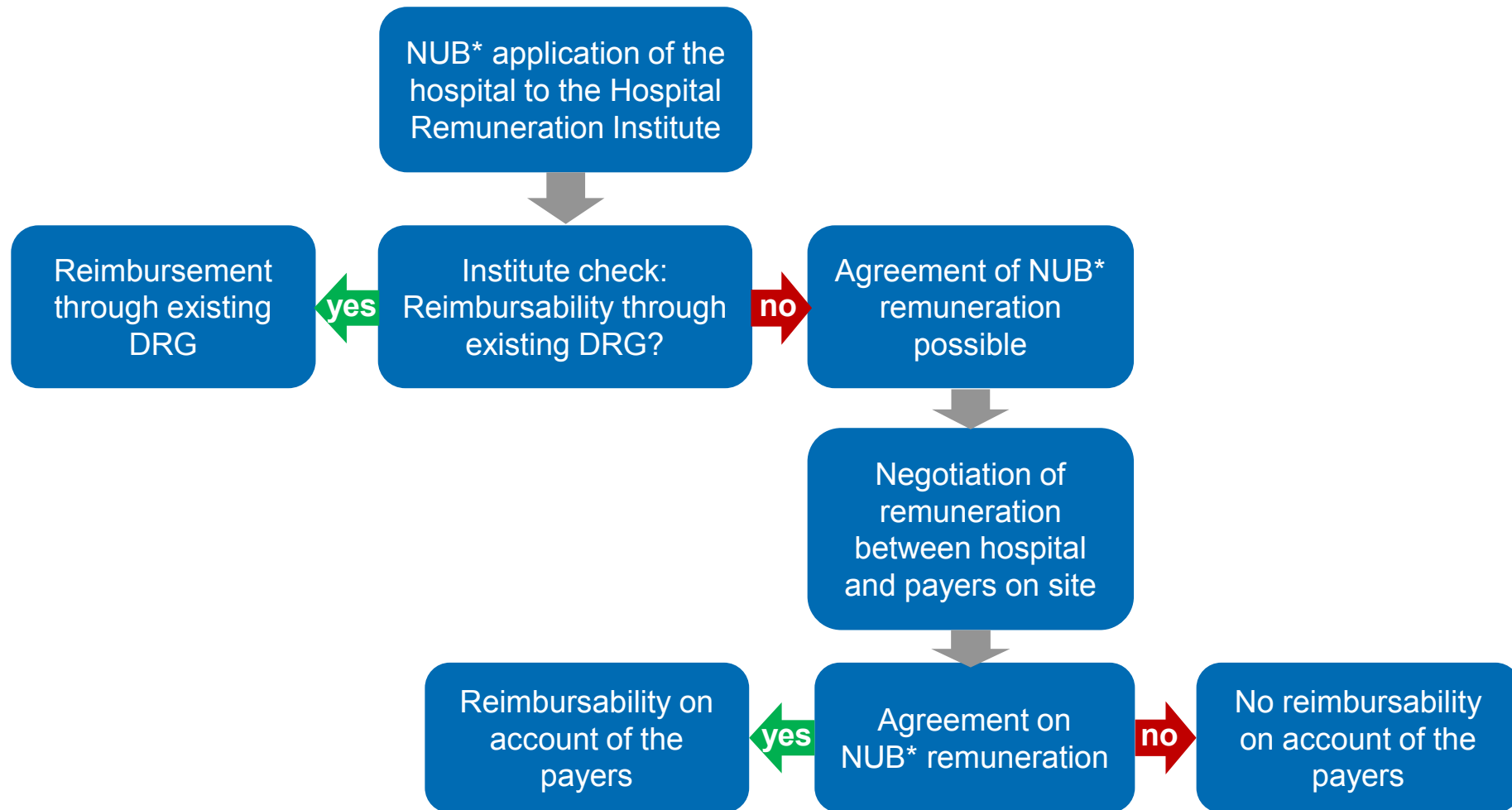
Pathway to Ambulatory Care Reimbursement



Source: National Association of Statutory Health Insurance Physicians

Pathway to Hospital Care Reimbursement

(Code for Innovative Procedures)



*New diagnostic and treatment methods

Source: National Association of Statutory Health Insurance Physicians

Approval of medical devices is based on the risk class

Risk Classes of Medical Devices		Examples
I	Lowest risk classification. Non-sterile and /or non-measuring function; no notified body involvement	Reading glasses, thermometers, wheelchairs
IIa	Medium risk. Manufacturing systems audit	Hearing aids, ultrasonic device, dental filling
IIb	Medium risk. Manufacturing & product design audit (Technical File)	Infusion pumps, X-ray apparatus, condoms
III	High risk. Manufacturing & design dossier audit	Hip implants, breast implants, drug-eluting stents

The German health care market is highly interesting, BUT...

- Evidence-driven
- Slow
- Risk-averse
- Partnership-driven
- German-speaking
- „Old boys network“-driven

Thank you!

Prof. Dr. Volker Amelung
German Managed Care Association /
Bundesverband Managed Care e.V. (BMC e.V.)
Friedrichstr. 136
10117 Berlin
GERMANY
+49 30 2809 4480
amelung@bmcev.de



bmcev.de



@bmc_ev



Bundesverband Managed Care



bmcev.de/youtube