Bundesverband Gesundheits-IT

Germany Trade & Invest Webinar Series: Succeed in Germany's Healthcare Market

German Health-IT Markets and their Characteristics

Sebastian Zilch

Governmental Affairs & Strategic Networking,
German Association of Healthcare IT Vendors

28 October 2014

Agenda

- bvitg and conhIT
- Health IT in Germany
- Health Information Exchange Infrastructure
- Challenges for Health IT in Germany
- Summary & Outlook

German Association of Health IT Vendors (bvitg)

- Represents the leading providers of health IT in Germany
  - → Members cover 90 percent of the German health IT market for inpatient and outpatient care
  - → 70 percent of member companies act internationally
- Established partner for government, self-administration and their institutions and organizations

Goals of the German Association of Health IT Vendors (bvitg)

- → Influence the political agenda and health IT legislature
- → Set new incentives and standards
- → Promote the health IT sector
- → Foster knowledge on health IT

Member Companies (alphabetically)

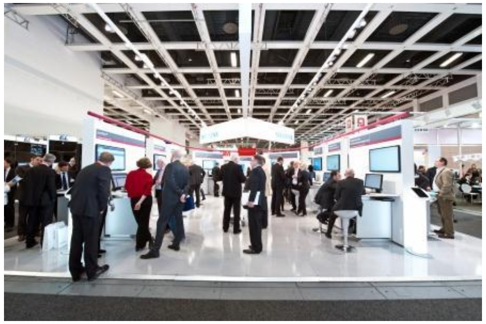
1. Aescudata GmbH
2. Agfa HealthCare GmbH
3. Allgeier Medical IT GmbH
4. atacama | Software GmbH
5. Cerner Deutschland GmbH
6. Cisco Systems GmbH
7. Chili GmbH
8. CompuGroup Medical Deutschland AG
9. Deutsche Telekom Clinical Solutions GmbH
10. Deutsche Telekom Healthcare and Security Solutions GmbH
11. DMI GmbH & Co. KG
12. DGN Deutsches Gesundheitsnetz GmbH
13. Duria eG
14. d.velop AG
15. E&L Medical Systems GmbH
16. EviMed Online GmbH
17. GE Healthcare
18. Health-Comm GmbH
19. HMM Deutschland GmbH
20. ID GmbH & Co. KGaA
21. IMS HEALTH GmbH & Co. OHG
22. InterComponentWare AG
23. iSOFT Health GmbH a CSC Company
24. K|M|S Vertrieb und Services AG
25. knowledgepark AG
26. KoSyMa GmbH
27. Magrathea Informatik GmbH
28. MARABU EDV-Beratung und Service GmbH
29. medatixx GmbH & Co. KG
30. medavis GmbH
31. MediaInterface GmbH
32. mediDOK Software und Entwicklungs GmbH
33. MediSoftware Computersysteme für Ärzte
34. Medizinische Medien Informations GmbH
35. MEDNOVO Medical Software Solutions GmbH
36. MEIERHOFER AG
37. NEXUS AG
38. Nuance Communications Healthcare Germany GmbH
39. opta data Abrechnungs GmbH
40. OSM Gruppe
41. PADline GmbH
42. Philips GmbH
43. RZV Rechenzentrum Volmarstein GmbH
44. Saatmann GmbH & Co. KG
45. Samedi GmbH
46. SAP Deutschland AG & Co. KG
47. Siemens AG Healthcare Sector
48. T2med GmbH & Co. KG
49. TELEKOM Healthcare Solutions
50. Thieme Compliance GmbH (ab 01.10.2014)
51. VISUS Technology Transfer GmbH
52. 3M Health Information Systems
53. 4voice AG

conhIT – connecting healthcare IT

- Europe´s biggest industry event in health IT
- Launched in 2008 by the bvitg and its members

- conhIT 2014: May 6 - 8 in Berlin
  - → 359 exhibitors from 14 countries
  - → 6,495 visitors from 65 countries
  - → 15 Congress sessions
  - → > 150 events in Academy, Congress and Networking
- Partner country 2014: Denmark

conhIT
Connecting Healthcare IT
14–16 April 2015

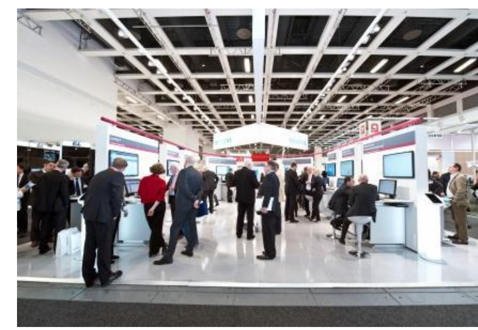


conhIT – connecting health IT

- conhIT 2015: April 14 - 16 in Berlin
- Theme: “Shaping the Future with Health IT”

http://www.conhit.de/en

conhIT
Connecting Healthcare IT
14–16 April 2015



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Health IT in Germany (I)

- Almost 100 percent of medical practices and hospitals use IT

  → Vast majority stores patient information electronically

  → Completely electronic patient records are still uncommon, yet share is growing

- Hospital budget and market volume

  → Approx. 1.5 - 2 % of expenditure in hospitals is invested in IT

  → Market volume: ~ US$ 1.31 billion

Health IT in Germany (II)

- Approx. 200 vendors of health IT in Germany
  - → Practice IS: ca. 120 vendors; 30 relevant ones; 2 with 55 % market share
  - → HIS: 8 vendors
  - → specialized solutions: approx. 80 vendors
  - → Result: numerous different sets of communication standards

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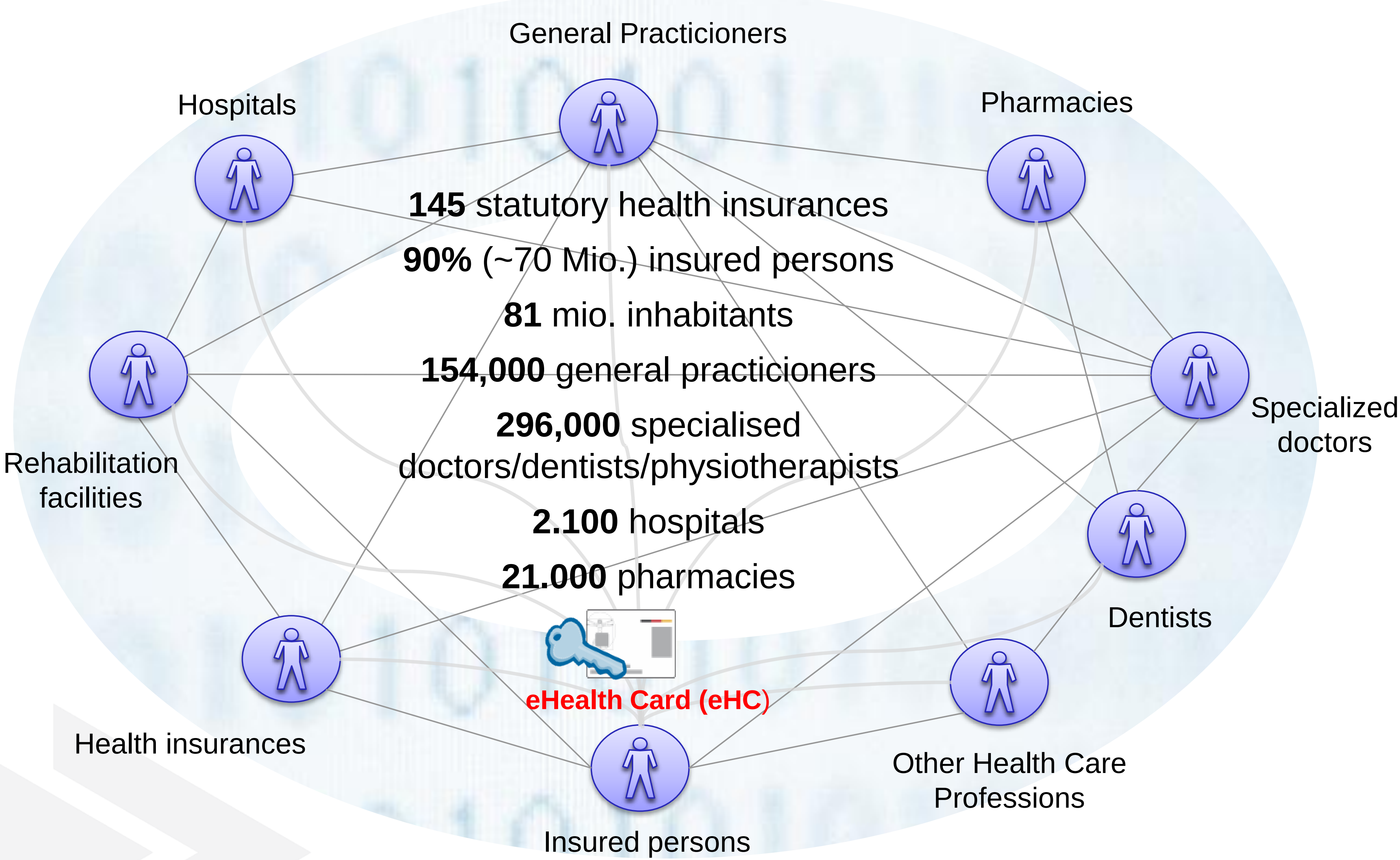
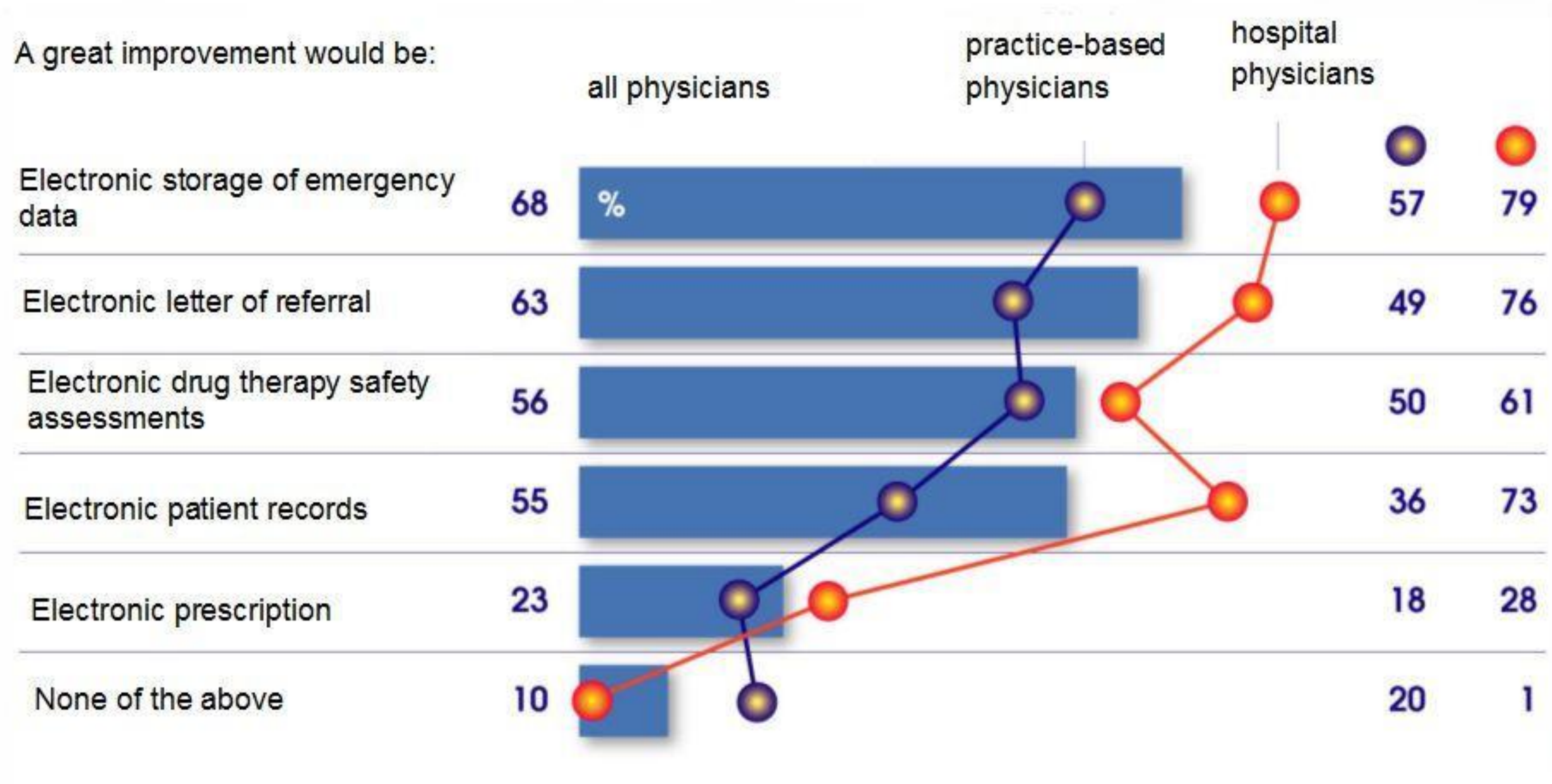
Envisioned German Telematics Infrastructure



Which Health-IT Applications would entail the greatest Improvements?



Relevance of IT solutions for physicians

- Majority of practices-based and hospital-based physicians expect an increase in relevance of the internet for:

  → Exchange of medical results with colleagues

  → Knowledge sharing and learning

  → Development of physician networks and homepage design

(bvitg survey, 2012)

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Challenges for Health IT in Germany (I)

Telematics Infrastructure

- → Structure of gematik does not foster (quick) agreement as stakeholders have different, sometimes conflicting interests
- → Important aspects for further applications, such as requirements, specifications or certification, still open

Challenges for Health IT in Germany (II)

No predictable environment for vendors to develop business cases

→ Return of investment concerning necessary IT solutions

→ Health IT not anchored in laws regulating health care

→ Lack of acceptance especially by care-providers

→ Comparatively low IT budget in Germany: approximately 1.5 to 2 percent of the overall costs-budget in hospitals are spent on IT

Challenges for Health IT in Germany (III)

Interoperability of solutions

→ In absence of agreement on standards and no national institutions with the authority to set standards, there is no nationwide interoperability between all vendor solutions

→ Flagship projects with innovative IT solutions and networks are oftentimes not transferable or lack proper business case

Challenges for Health IT in Germany (IV)

Concerns over data security

- → Strong impact on public debate/acceptance of health IT and the progress of the telematics infrastructure
- → There are generally no central health data registers in Germany, with few exception for certain diseases/aspects of provision (e.g. cancer register)
- → Nothing comparable to the HIPAA rules and procedures in place

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Summary & Outlook

- Health IT is an innovative, growing market with growth rates above growth of GDP (2012: 3.2%; average 0.7%)
- Almost 100 % use of health IT in practices and hospitals
- National Health Telematics Platform as basic infrastructure for identification, security and transport services operational with first applications in 2015
- Many innovative projects and cooperation fostering inter-operability between different institutions and vendor solutions
- Recognition of the need for unified interoperability standards; hope for agreement in coming years
- International Exchange and Mutual Learning Important!
- eHealth Act expected early 2015 →?

bvitg e. V.

Taubenstraße 23

D-10117 Berlin

E sebastian.zilch@bvitg.de

T +49 30 206 22 58 - 12