



Digital Health & MedTech in Germany

in cooperation with



Sponsored by
Bavarian Ministry of Economic Affairs,
Regional Development and Energy

February 16, 2023



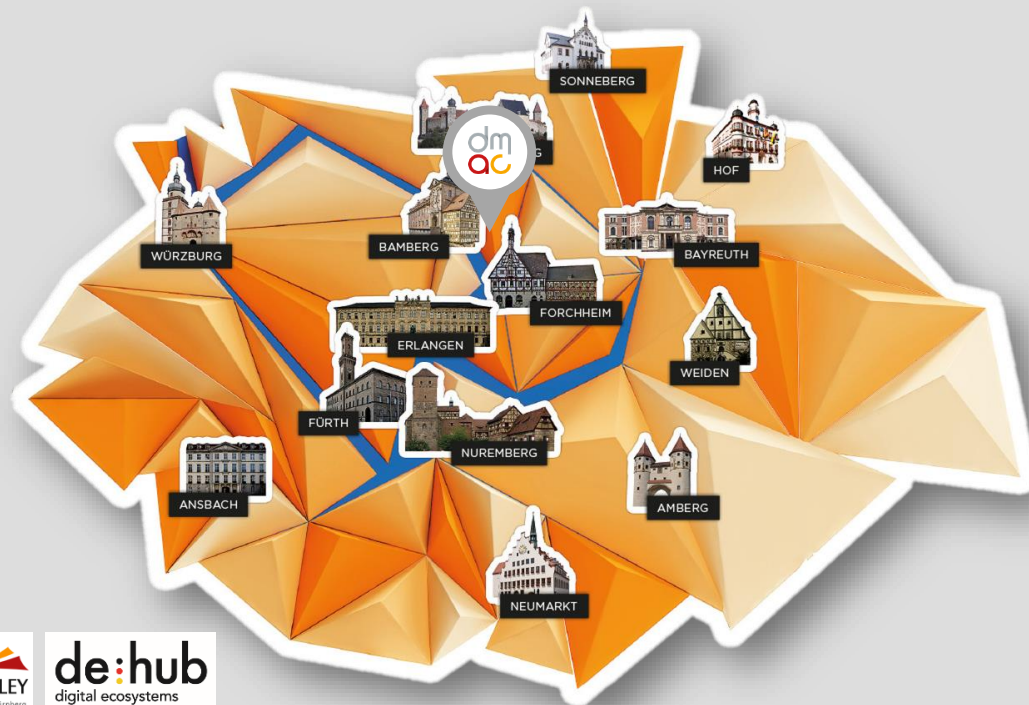
MEDICAL VALLEY
DIGITAL HEALTH
APPLICATION CENTER

ABOUT
dmac



dmac is the digital health think tank of an internationally leading healthcare ecosystem

Medical Valley European Metropolitan Region Nuremberg



500+
MedTech Companies

65+
Hospitals

80+
University Institutes w/ MedTech Focus

20+
Non-University Research Institutes

4
Medical Valley Centers



dmac is a joint venture of Medical Valley EMN and Fraunhofer IIS and builds on both partners' complementary strengths



Core Partners

Network

Internationally leading innovation ecosystem in the area of healthcare management.

Digital Health Expertise

Think tank and service provider for digital healthcare manufacturers.

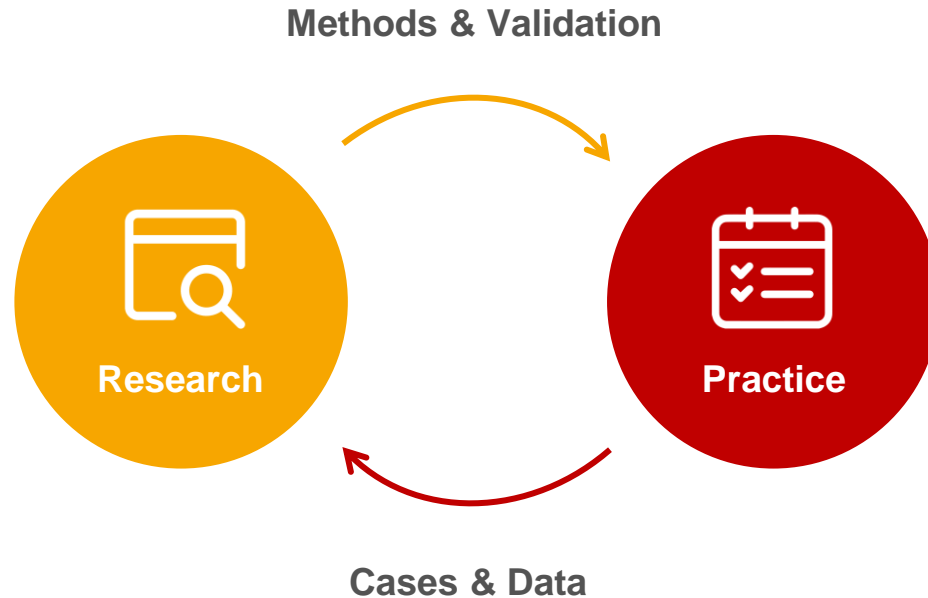
Technology

Application-oriented research institute and a global leader in microelectronic and information technology system solutions and services.



Our services are based on our research activities which, in turn, benefit from our practical insights and real-world experience

Research & Practice

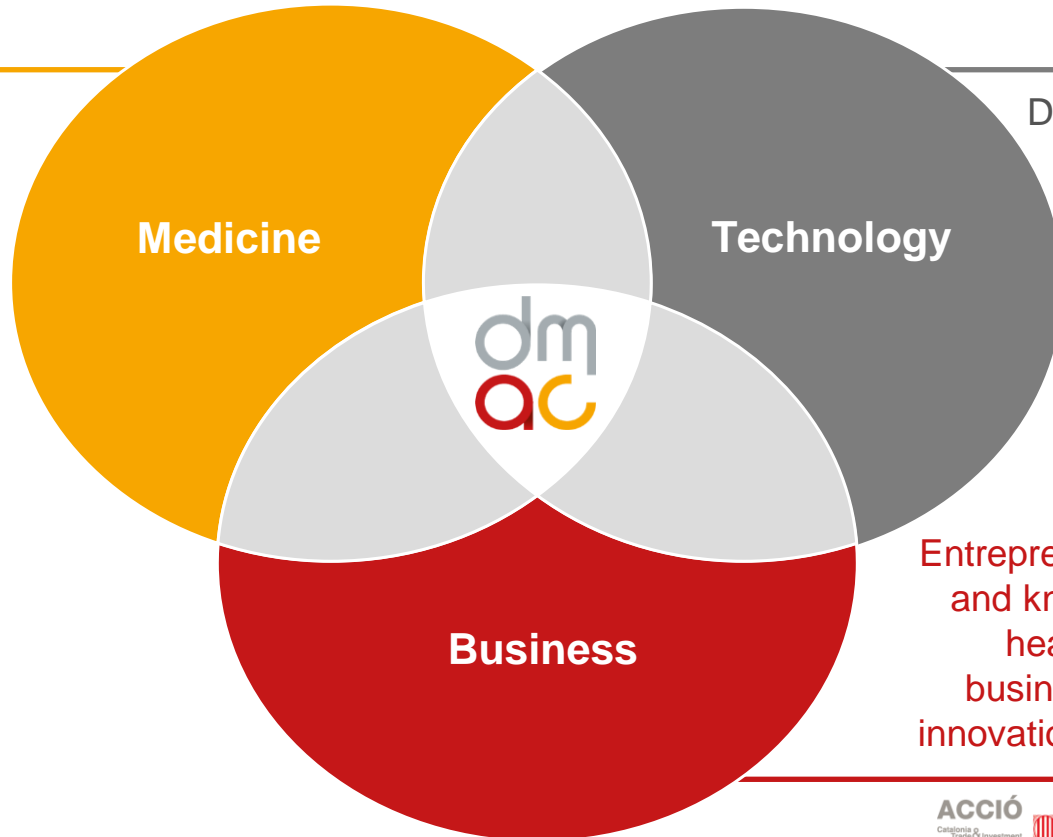


dmac combines expertise from medicine, business and technology for a holistic view on healthcare



Areas of Expertise

Focus on the well-being of the patient and experience in medical care and clinical research

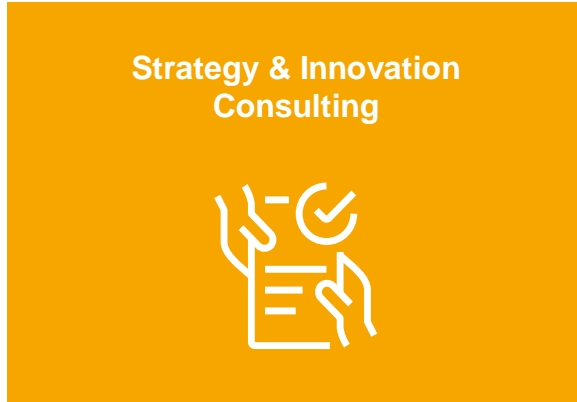


Deep understanding of digital technologies, required skills and transformation processes

Entrepreneurial mindset and knowledge on the healthcare market, business models and innovation management

We offer a portfolio of complementary services and tools to provide a holistic yet tailored experience for every partner

Business Areas



Customized **consulting services** for digital healthcare providers and proven **innovation programs** for startups

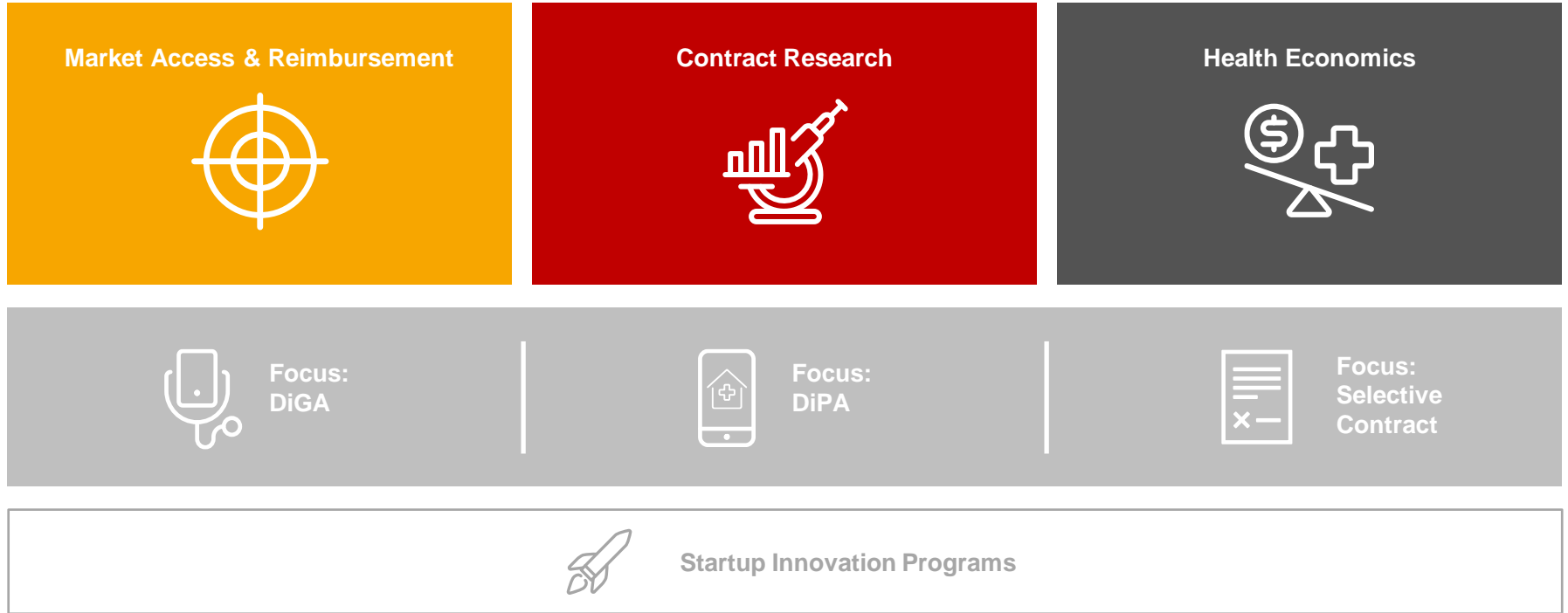


Modular **research services** for digital healthcare providers, **from conceptualization to implementation**

Our services are modular and can be customized to each company's needs



Service Categories



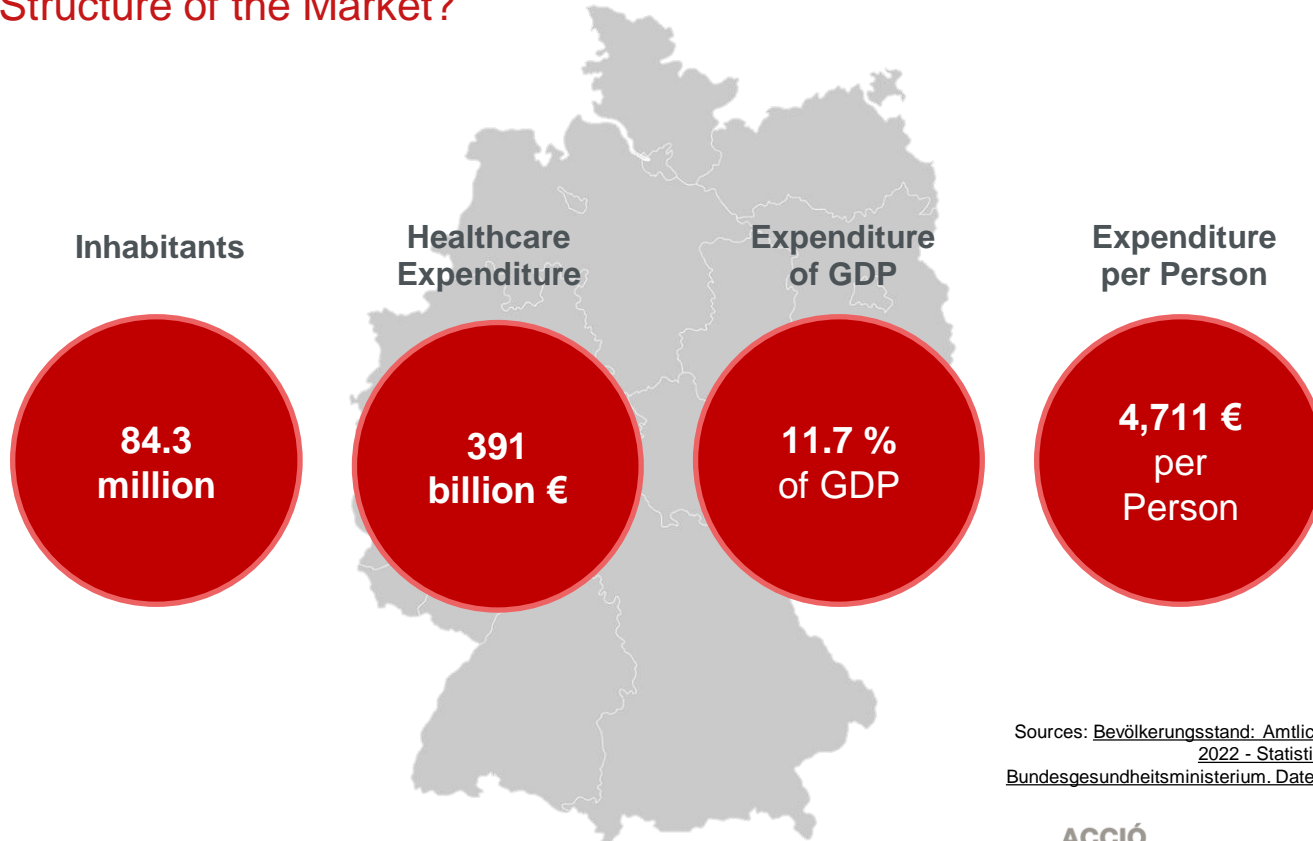


ABOUT THE
German Healthcare Market &
Reimbursement Pathways



German Healthcare Market

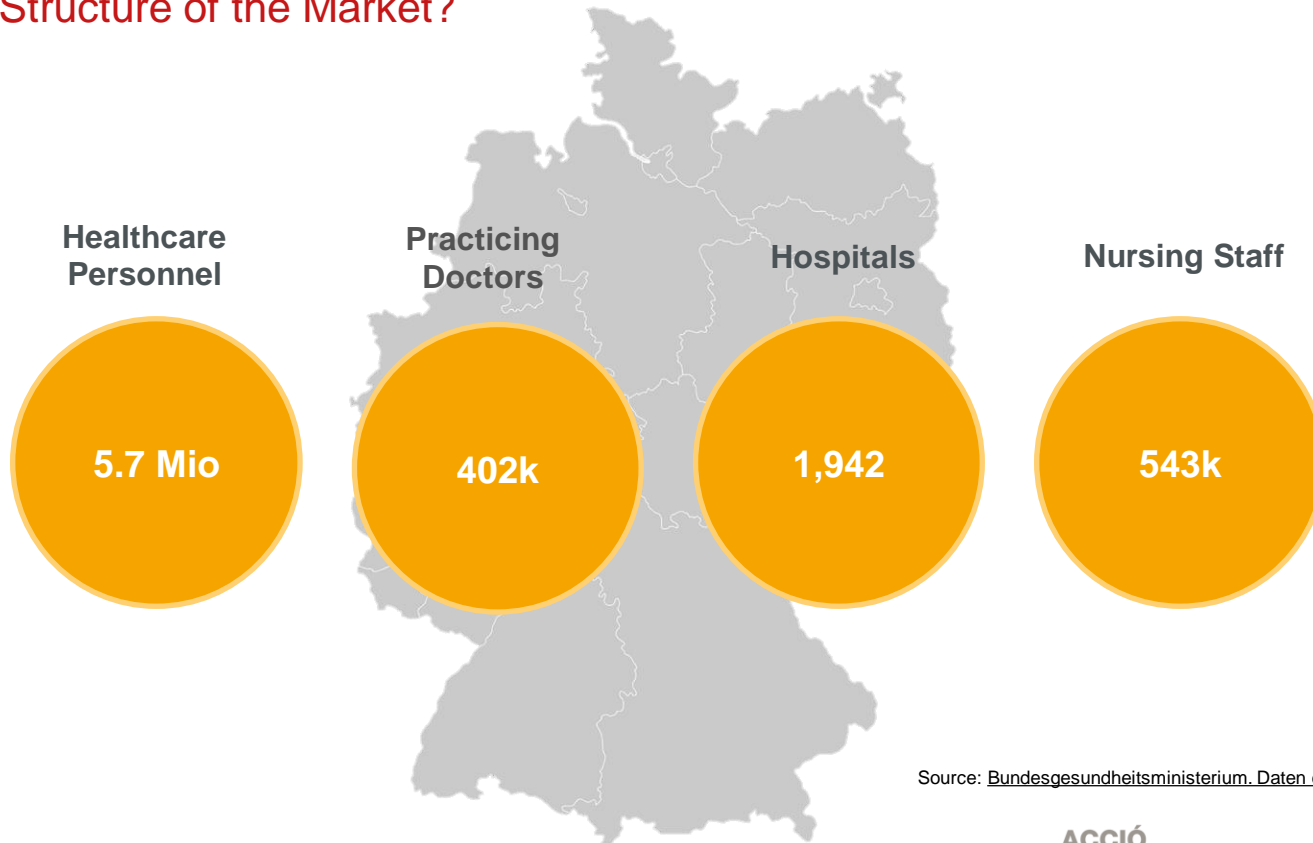
What Is the Structure of the Market?



Sources: Bevölkerungsstand: Amtliche Einwohnerzahl Deutschlands 2022 - Statistisches Bundesamt (destatis.de) | Bundesgesundheitsministerium. Daten des Gesundheitswesens 2020

German Healthcare Market

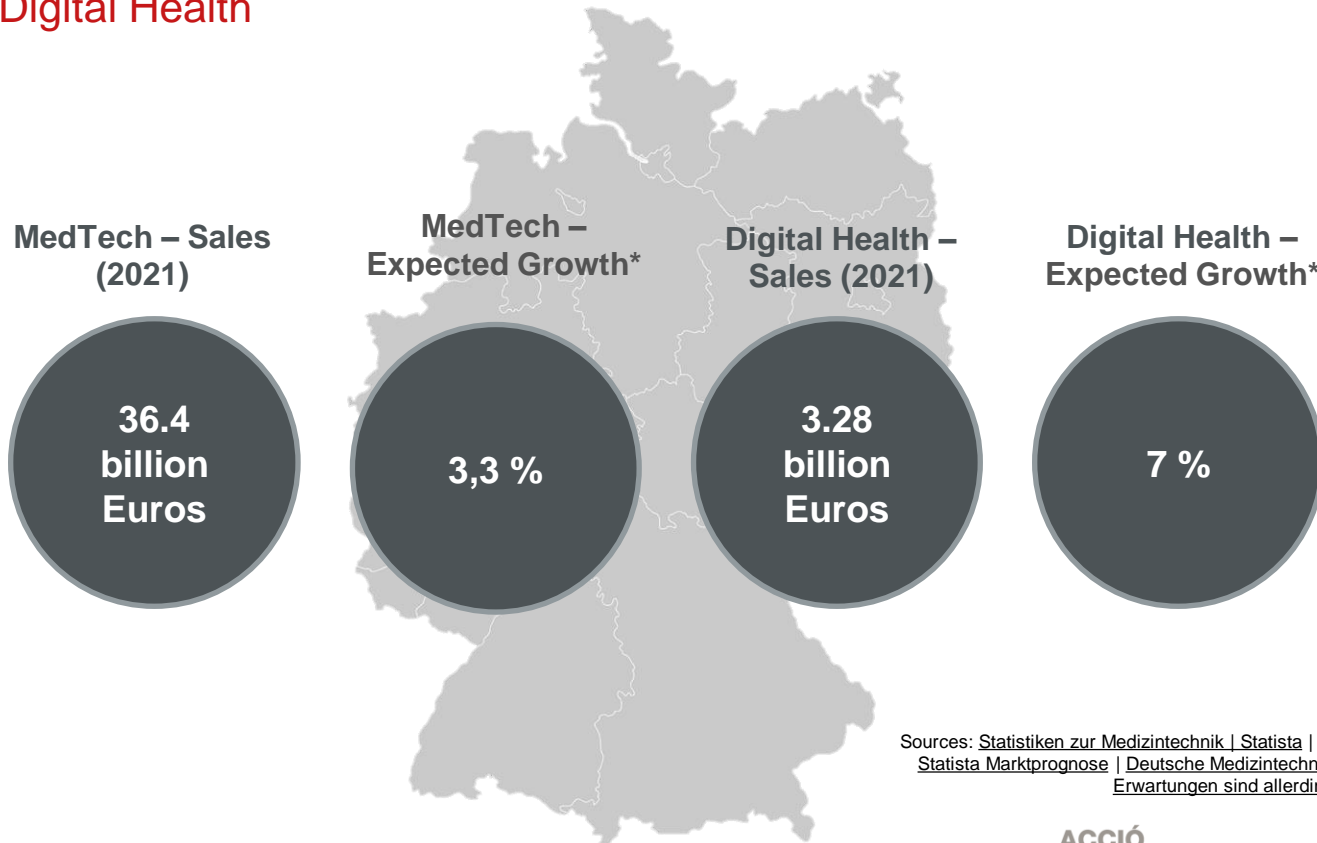
What Is the Structure of the Market?



Source: [Bundesgesundheitsministerium. Daten des Gesundheitswesens 2020](#)

German Healthcare Market

MedTech & Digital Health



Sources: [Statistiken zur Medizintechnik | Statista](#) | [Digital Health - Deutschland | Statista Marktprognose](#) | [Deutsche Medizintechnik bleibt auf Wachstumskurs. Erwartungen sind allerdings gedämpft \(devicemed.de\)](#)

Digital Healthcare Act (Digitale-Versorgung-Gesetz)



Enabled **Digitale Gesundheitsanwendungen – DiGA** („app on pre-scripton“) reimbursed by SHI

Digital Healthcare and Nursing Care Modernization Act



Enabled **Digitale Pflegeanwendungen – DiPA** (Digital Care Solutions) reimbursed by Statutory Care Insurance

Hospital Future Act (Krankenhauszukunftsgesetz)

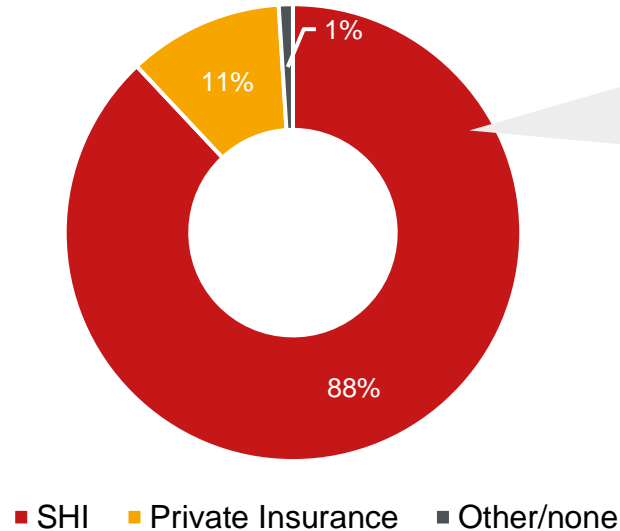


4.3 billion € funding for **digitization in hospitals**

German Healthcare Market

Statutory Health Insurance (SHI)

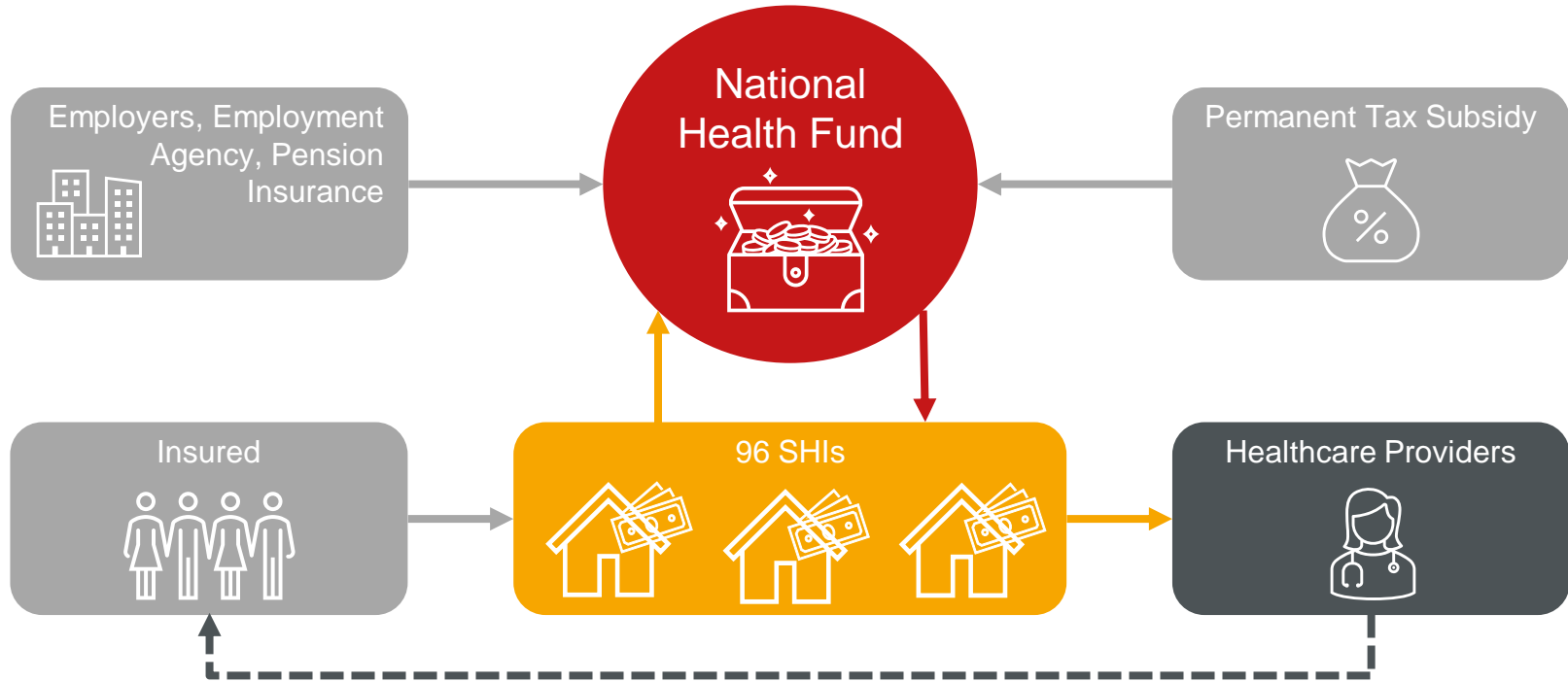
Distribution of Insurance Types



Total number of insured persons: 73.3 million
96 SHIs
Number of insured persons ranges from 5,000 to 11 million

German Healthcare Market

Statutory Health Insurance (SHI) – Financing



Outpatient Sector



- Doctors: General Practitioners, Specialists
- Home Care
- Therapists
- Pharmacies

Inpatient Sectors



- Hospitals
- Nursing Homes

Industry



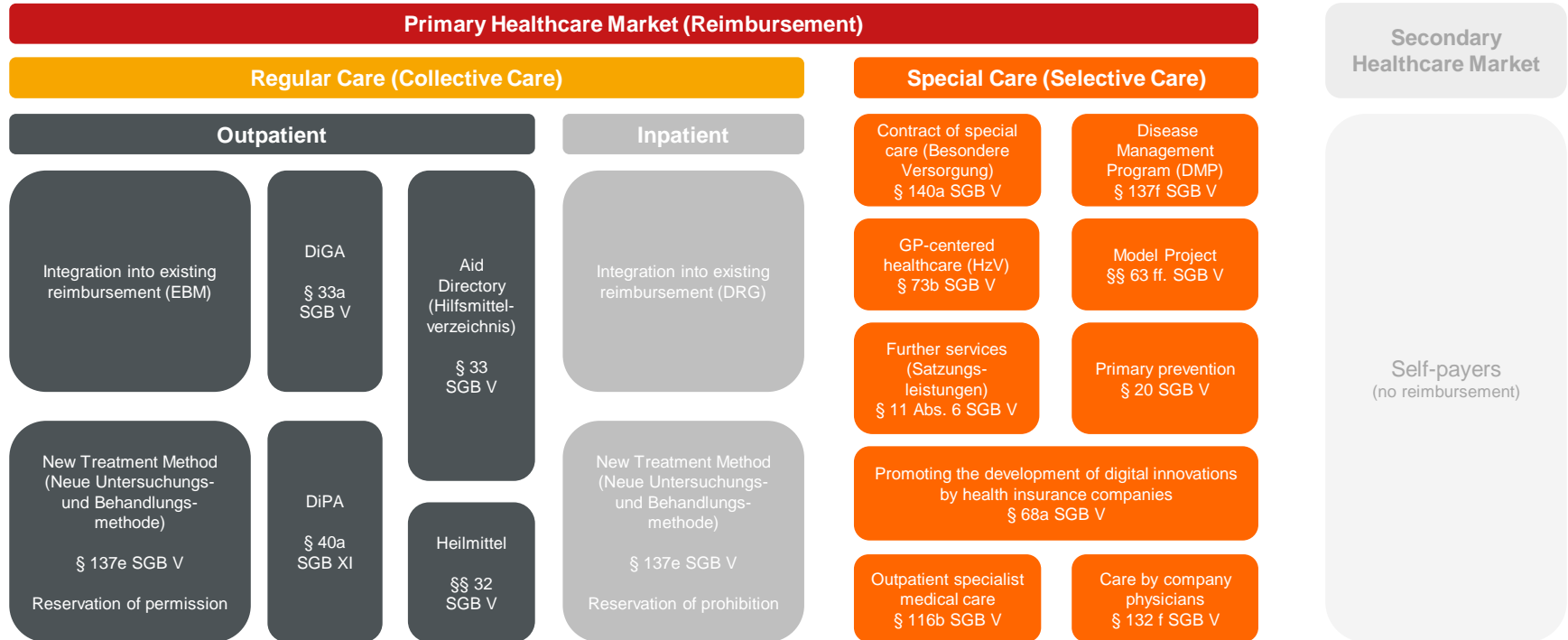
- MedTech
- Digital Health
- Pharma

Payers: Statutory Health Insurance (SHI) | Statutory Care Insurance | Statutory Pension Insurance | Statutory Accident Insurance | Private Insurance



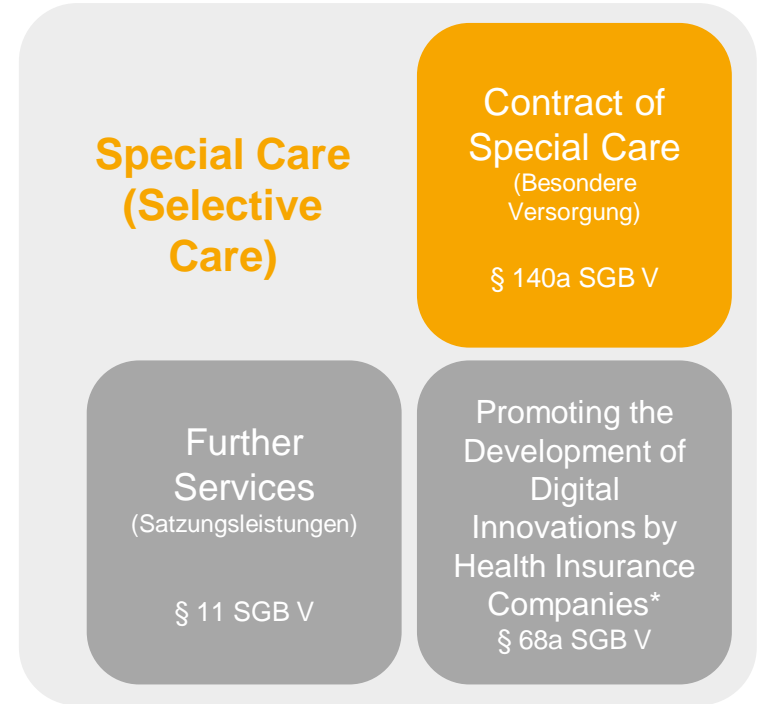
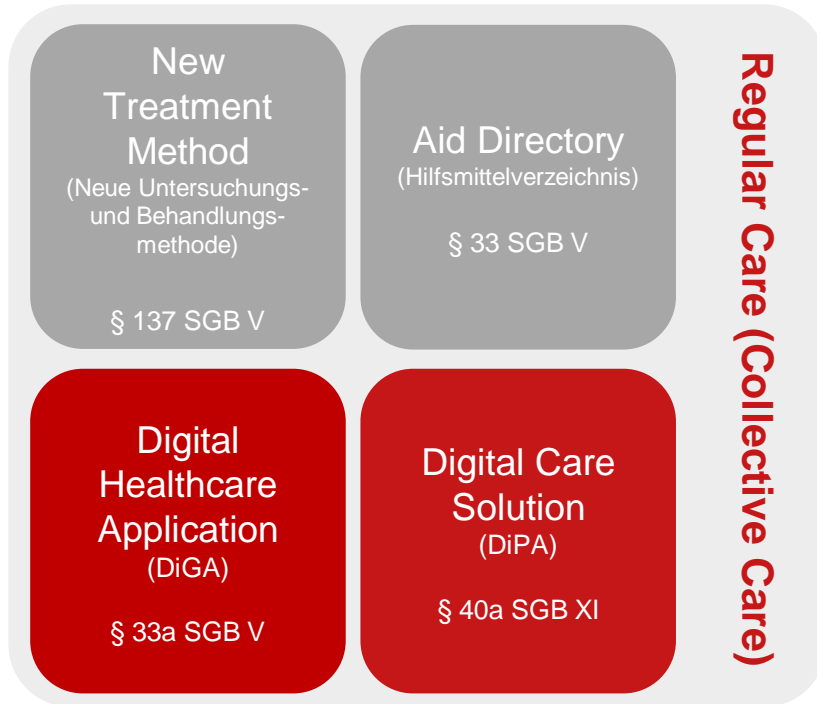
Reimbursement Pathways

Overview of Possibilities



Reimbursement Pathways

Possibilities for MedTech & Digital Health



Focus

Program Goals



Giving an **overview** of the German healthcare system and the markets for digital health and medical technologies.



Providing knowledge on different **market access strategies** and **reimbursement pathways**.



Enabling participants to identify **opportunities**, understand **processes** and **requirements** and better assess **potentials** and **pitfalls**.



Supporting participants in **choosing** the right **strategy** and **pathway** for their product / service.

You should take part if you...



... have the goal to enter the **German market** now or in the coming years.



... already have a certain degree of maturity from a **business, technological** and **clinical** perspective but are not entirely certain about your **readiness** for the German market.



... are looking for an experienced **partner** to **challenge** and **guide** you.



Matthias Rass
**Head of Strategy &
Innovation Consulting**

matthias.rass@mv-dmac.de



Dr. Johanna Mathes
**Project Manager
Health Economics**

johanna.mathes@mv-dmac.de



**MEDICAL VALLEY
DIGITAL HEALTH
APPLICATION CENTER**

a joint venture of



<https://www.mv-dmac.com/>



<https://www.linkedin.com/company/dmac-bamberg>



https://twitter.com/mv_dmac



+49 951 96430065