

# **Covid-19** pushes digitalization in health care.

Are health care systems prepared to provide digital solutions with adequate incentives during the crisis?

**The German case!**



Market Access &  
Pricing Strategy GmbH



Dr. Stefan Walzer  
*Speaker*



Lutz Vollmer  
*Moderator*

26.05.2020  
12h CET /  
12h PT

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# Covid-19 pushes digitalization in health care!?

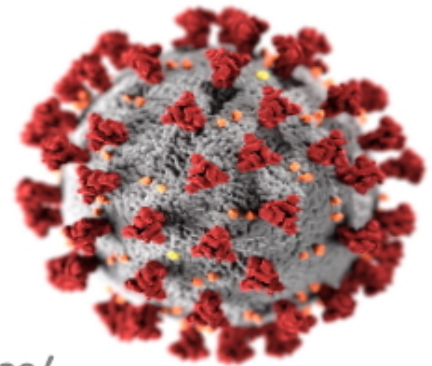
May 28<sup>th</sup> 2020

Dr. Stefan Walzer

MArS Market Access & Pricing Strategy GmbH, Germany  
State University Baden-Wuerttemberg, Germany  
University of Applied Sciences Ravensburg-Weingarten, Germany



# **Covid-19** **Task Force**

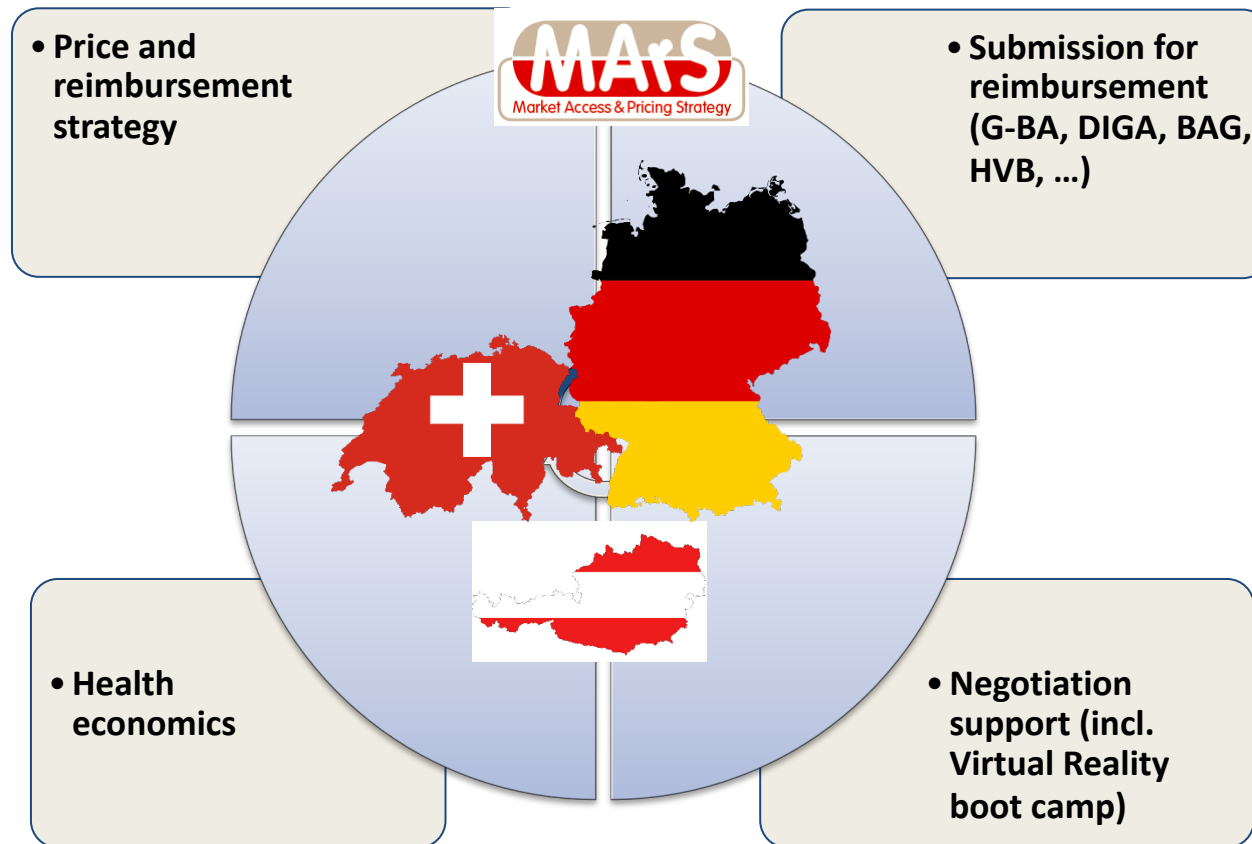


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# COVID-19-related opportunities for digital healthcare start-ups

External		<b>General</b>	Increased public awareness and openness towards digital healthcare	<b>88%</b>
		<b>General</b>	Demonstrated medical and/or economic value	<b>54%</b>
		<b>Payers</b>	Favouring cost effective digital healthcare solutions	<b>35%</b>
		<b>Investors</b>	Capital inflow into 'crisis proof' digital healthcare space	<b>23%</b>
		<b>Regulators</b>	Less strict requirements and administrative processes	<b>19%</b>
		<b>Providers</b>	Improved technical infrastructure	<b>19%</b>
Internal		<b>Internal</b>	Introduction of new ways of working	<b>19%</b>
		<b>Internal</b>	COVID-19 specific business opportunities	<b>12%</b>
		<b>Internal</b>	Increased availability of top talent	<b>8%</b>
		<b>Other</b>		<b>23%</b>

- „So far, the crisis has been a catalyst for telemedicine services in Germany. In addition to pure telemedicine providers, physicians, psychotherapists and other healthcare professionals adopted the technology, patients are increasingly looking for virtual support by their physician.“

Health Innovation Hub 2020

# One the one hand...

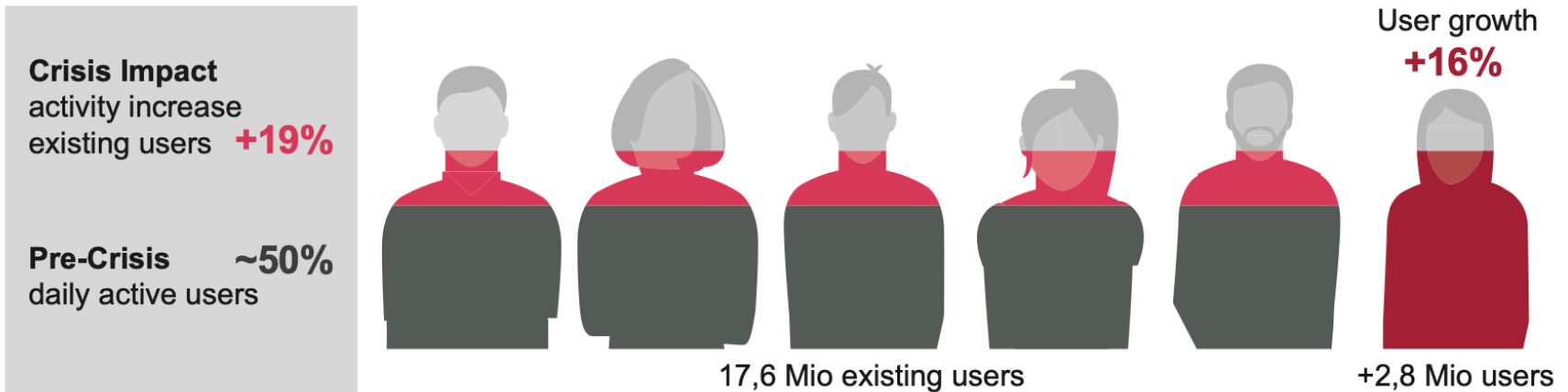
- Outpatient reimbursement codes were set-up before but especially also during the Covid-19 outbreak:
  - Monitoring of patients with a defibrillator or CRT system (introduced in 2016!)





- Outpatient reimbursement codes were set-up before but especially also during the Covid-19 outbreak:
  - Monitoring of patients with a defibrillator or CRT system (introduced in 2016!)
  - Telemedical applications
  - Teleconsultation
  - Video consultation

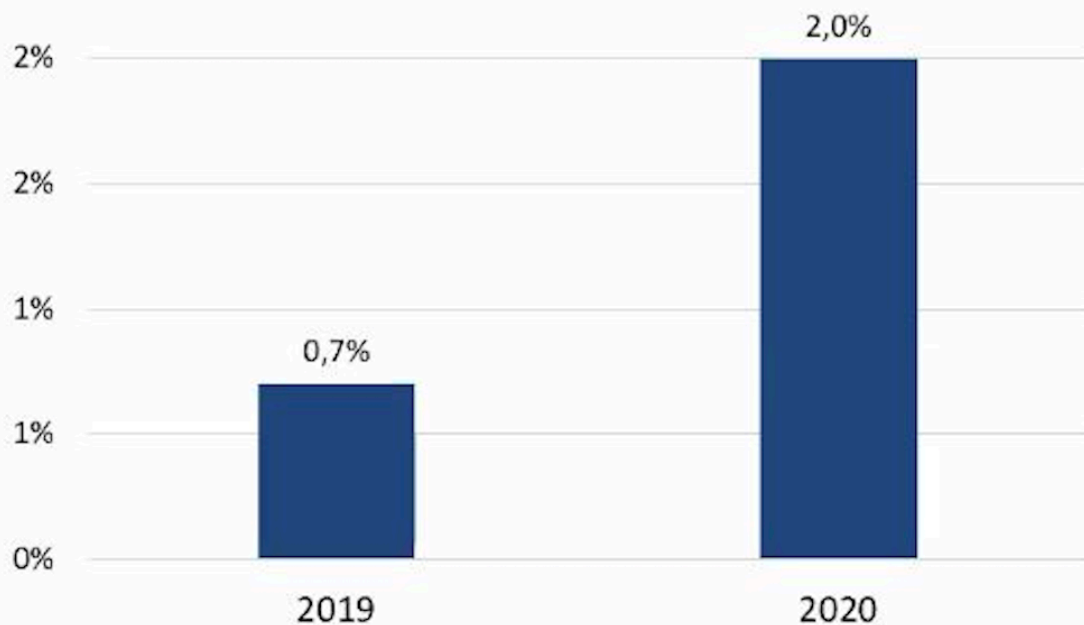
# COVID-19's effect on digital health and fitness solution usage



Source: [www.mhealth.jmir.org/2017/12/e197/](http://www.mhealth.jmir.org/2017/12/e197/), [www.stanford.edu/~emurnane/files/UbiComp15\\_Mobile.pdf](http://www.stanford.edu/~emurnane/files/UbiComp15_Mobile.pdf),  
[www.de.statista.com/statistik/daten/studie/36146/umfrage/anzahl-der-internetnutzer-in-deutschland-seit-1997](http://www.de.statista.com/statistik/daten/studie/36146/umfrage/anzahl-der-internetnutzer-in-deutschland-seit-1997),  
[www.tab-beim-bundestag.de/de/pdf/publikationen/berichte/TAB-Arbeitsbericht-ab179.pdf](http://www.tab-beim-bundestag.de/de/pdf/publikationen/berichte/TAB-Arbeitsbericht-ab179.pdf),  
Strategy& Survey (April 2020)

# ... and on the other hand!

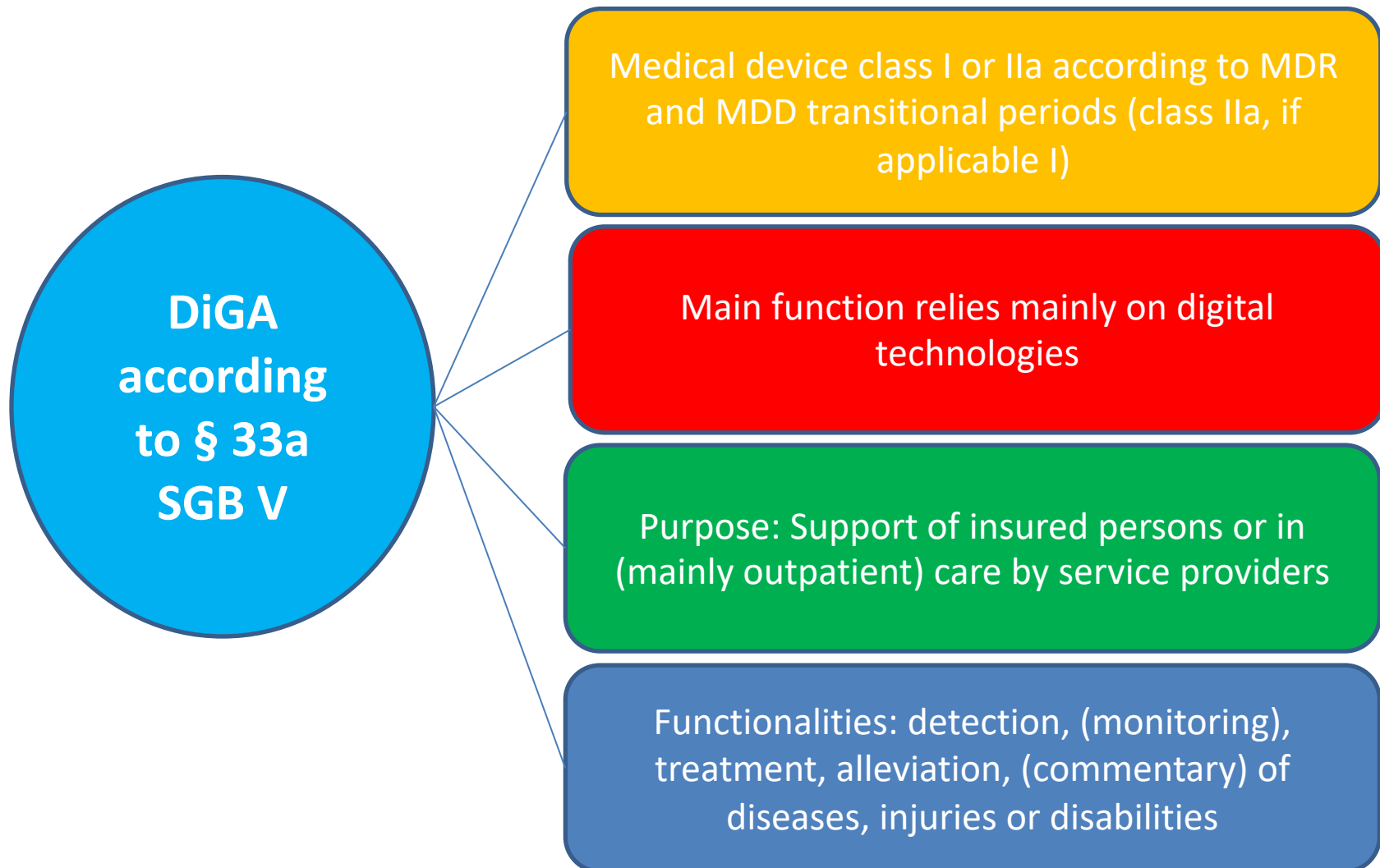
Online GP visits in 2019 vs Q1 2020



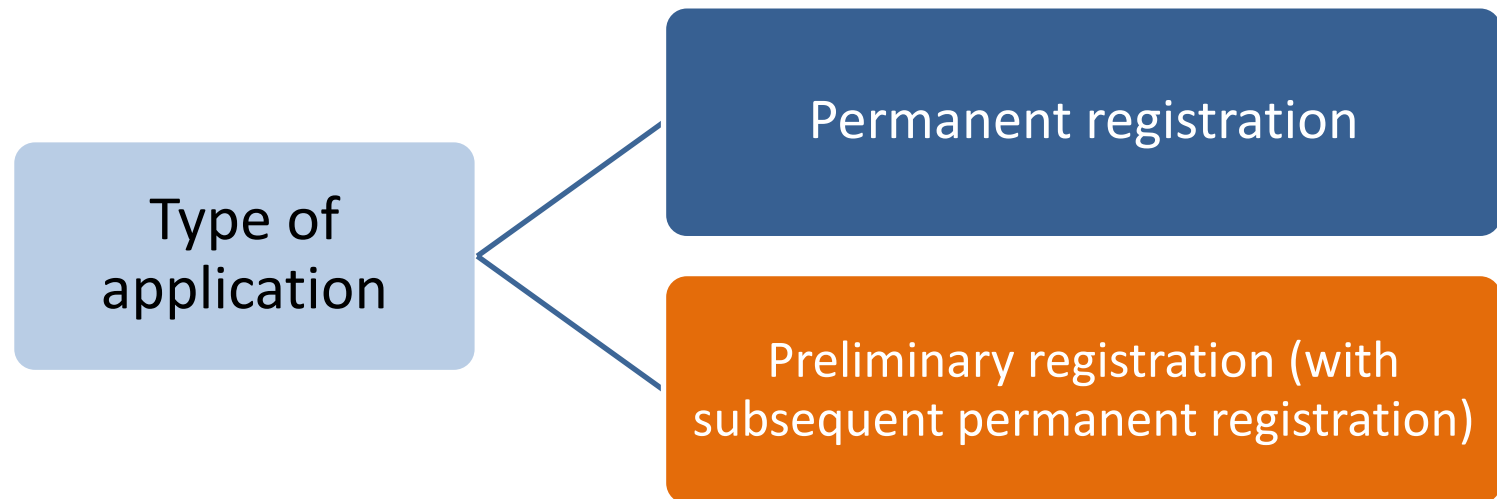
... but Germany implemented the  
DiGA already before Covid-19...



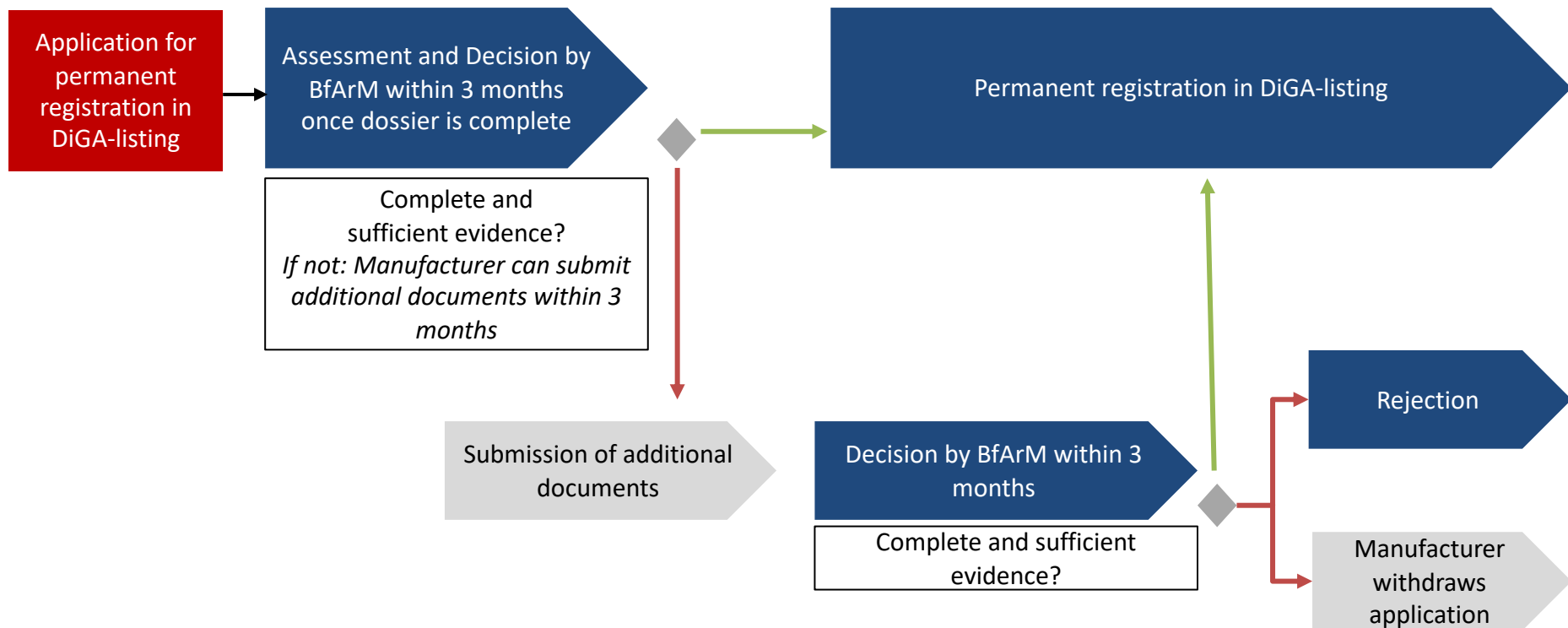
# Definition: Digital Health Application („DiGA“)



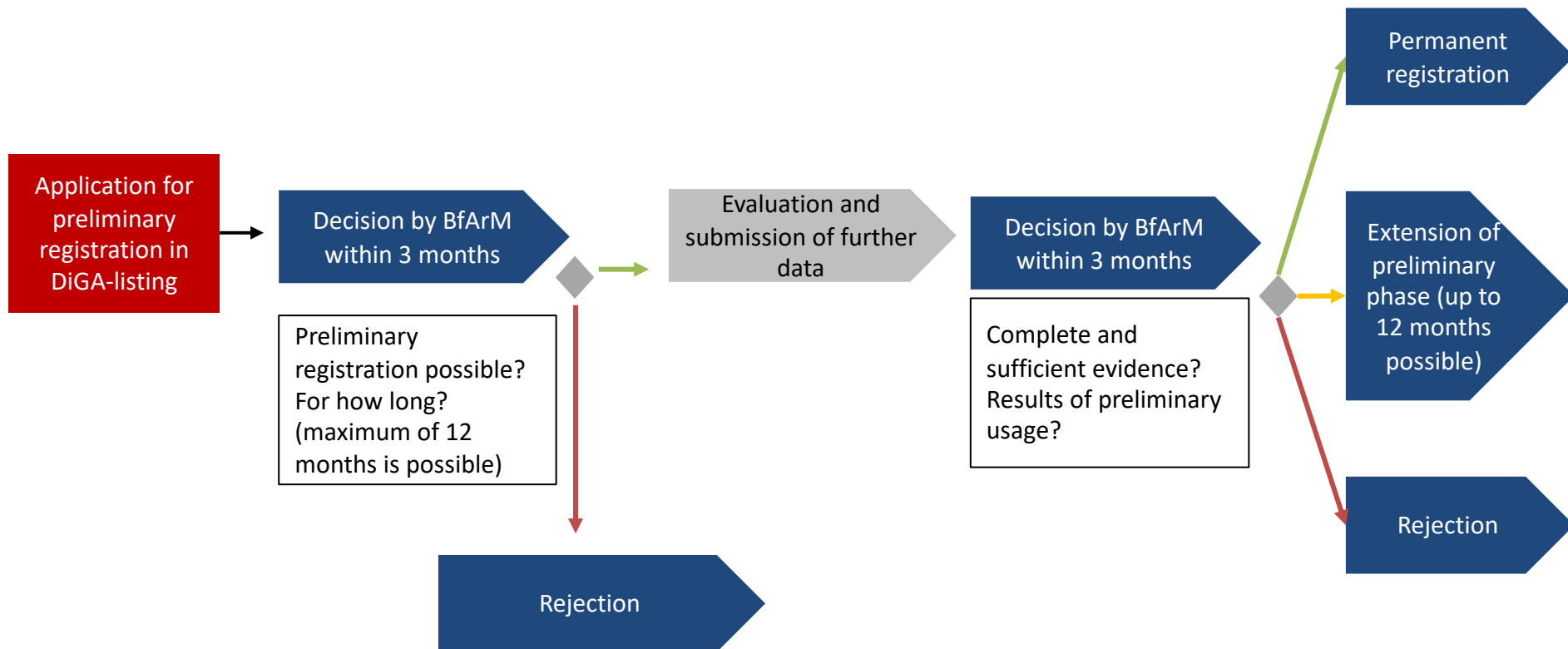
# Types of DiGA-listings



# Process of permanent registration in DiGA-listing



# Process of preliminary registration in DiGA-listing

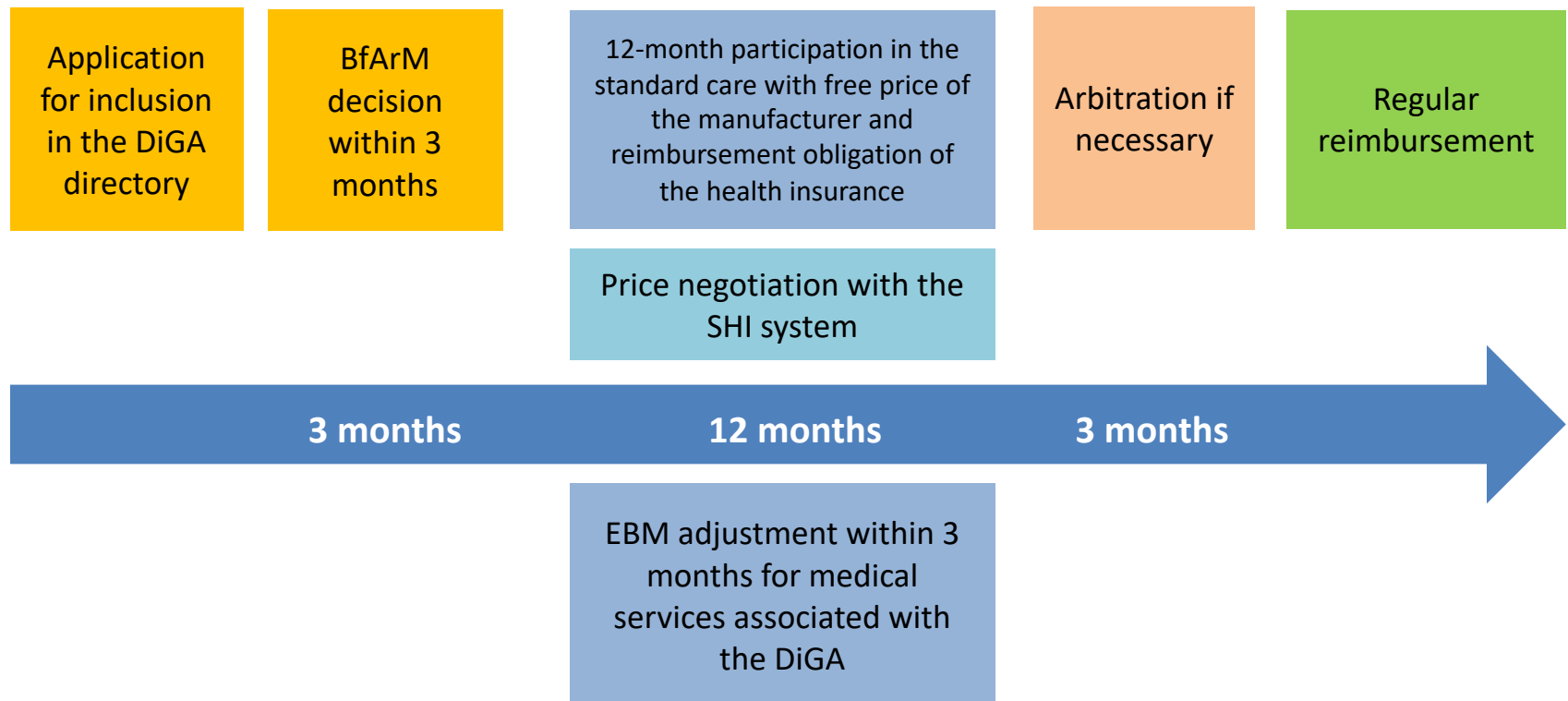


## Legend

◆ Decision requiring binding criteria



# Time to reimbursement



# Patient pathway

Most likely option: QR code on prescription



# Conclusions: Too early to call Germany a digital health nation...

No major impact on digitalization in health care in Germany due to the Covid-19 outbreak

However, the DiGA law was implemented which might trigger further use of digital services also due to the Covid-19 pandemic.

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## **Covid-19** in Europe

**Germany ahead of others, but when will the second wave come and how will this potentially look like?**



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25.06.2020  
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