

MArS Webinar: Digital health in Germany – start of a rocket or just a big bluff?

28th January 2021

Dr. Stefan Walzer
Lutz Vollmer

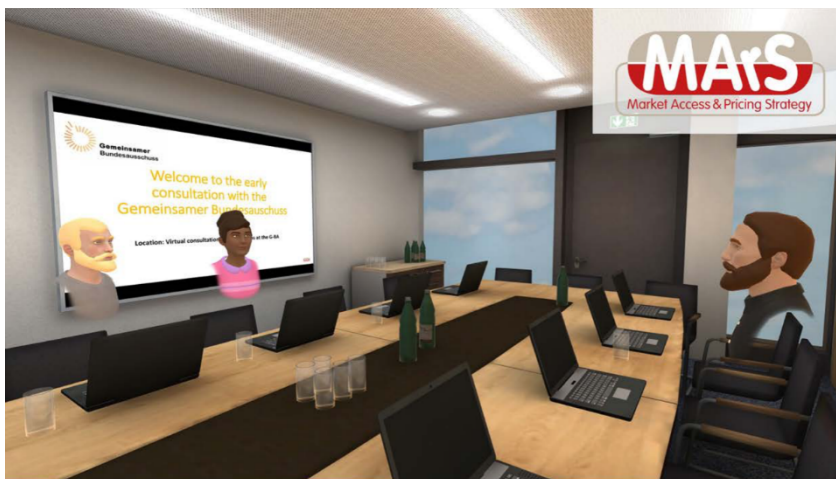
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Virtual Reality Negotiation Training Increases Negotiation Knowledge and Skill

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Broekens J., et al. (2012) Virtual Reality Negotiation Training Increases Negotiation Knowledge and Skill. In: Nakano Y., et al. (eds) Intelligent Virtual Agents. IVA 2012. Lecture Notes in Computer Science, vol 7502. Springer, Berlin, Heidelberg

Questions welcome!





- Feel free to ask questions. After the presentation, we will have time for your questions.
- Use either the Zoom chat function or the Q&A function to raise your questions or comments.
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Webinar




The potential impact of the
2020 US presidential election
on global health care pricing




Market Access &
Pricing Strategy GmbH



Dr. Stefan Walzer
Speaker



Karen Sandman
Purple Squirrel Economics (PSE)



Lutz Vollmer
Moderator



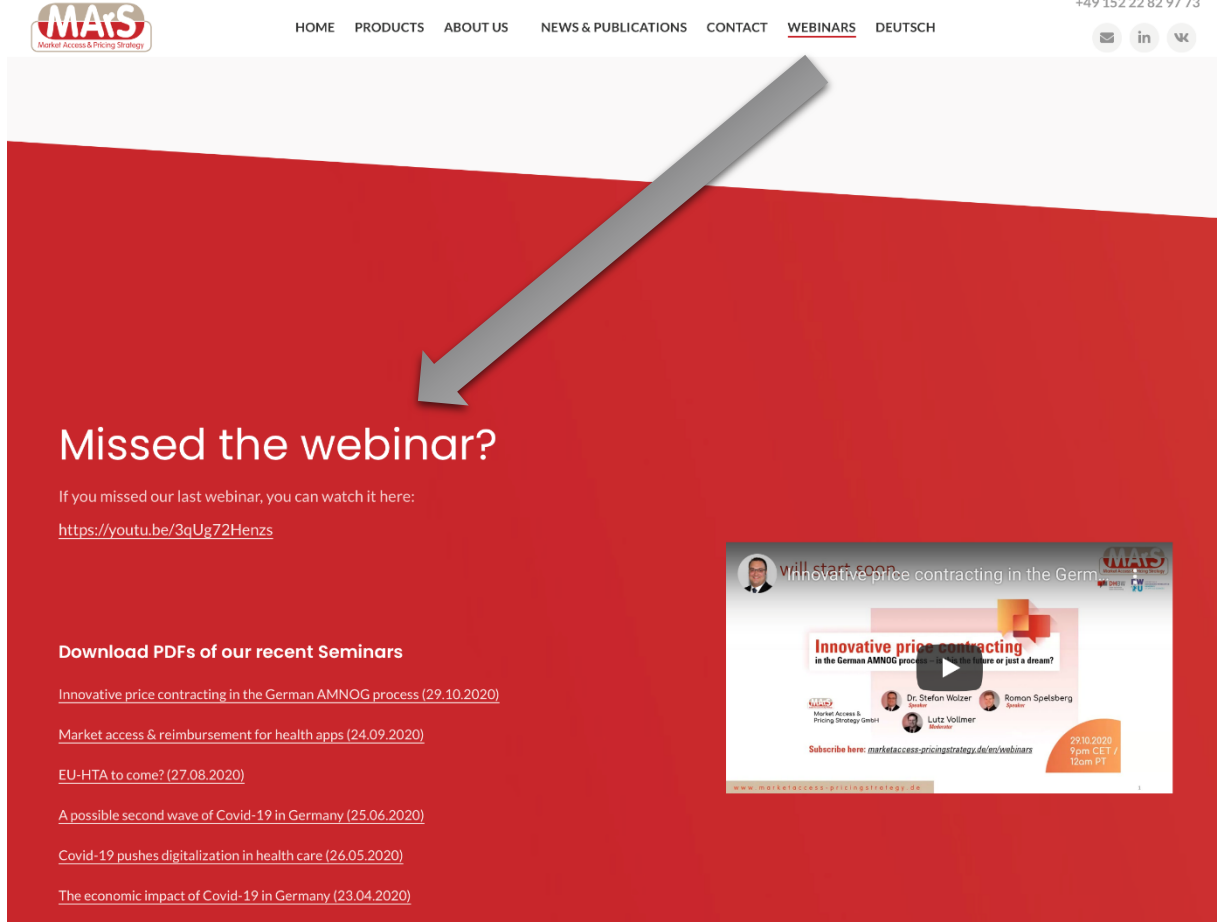
Gabriel Trembley
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- [A possible second wave of Covid-19 in Germany \(25.06.2020\)](#)
- [Covid-19 pushes digitalization in health care \(26.05.2020\)](#)
- [The economic impact of Covid-19 in Germany \(23.04.2020\)](#)

Innovative price contracting in the German AMNOG process – a vision or just a dream?

Will start soon

Dr. Stefan Wolter
Speaker

Ramon Spelsberg
Speaker

Lutz Vollmer
Moderator

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29.10.2020
9pm CET /
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Our presenters and discussants today



Dr. Stefan Walzer
Speaker



Lutz Vollmer
Moderator



Ulf Maywald
AOK Saxonia

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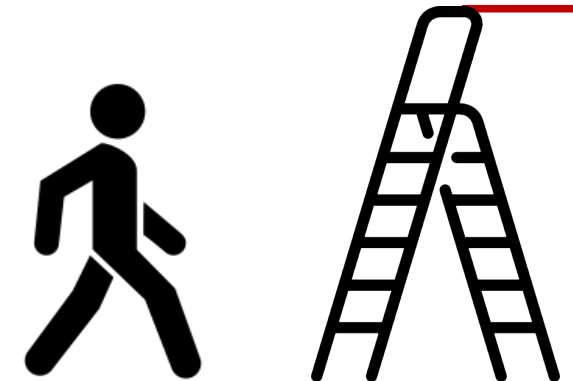
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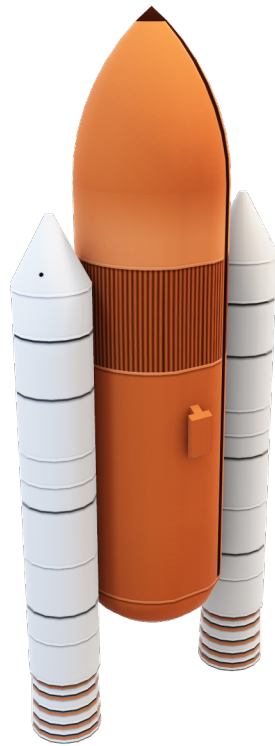
Momentum for Digitalisation

The Covid-19 pandemic and the current ministry of health are putting digitalisation on top of the health policy agenda in Germany

- The pandemic was defined as the biggest **boost for digital transformation initiatives** in hospitals: Hospitals normally only invest their money in projects which have a direct financial benefit for them; Now they were forced to invest in digital projects and realised that they also provide financial benefits
- A lot of hospitals hold their investment budgets back in these days as safety reserves but they will **invest once the pandemic is over**
- The current situation also led to a **shift in the mind-set** of physicians: There is a greater willingness to use digital innovations



... where does Germany start at?



General hurdles for Market Access in Germany

Decentralised structure and strict separation between in- and outpatient sectors



103 Individual health insurance funds



17 associations of statutory health insurance physicians and
16 “Länder” (regions)



Strict separation of in-and outpatient sector with different
regulations and very limited integration



Diverse hospital landscape with private hospitals, big
university hospitals and smaller hospitals

Status Quo: Digitalisation in Germany

Hospitals want/need to invest more in digitalisation but are unable due to a lack of funding

Current Level of adoption of HIT^{1,2}:

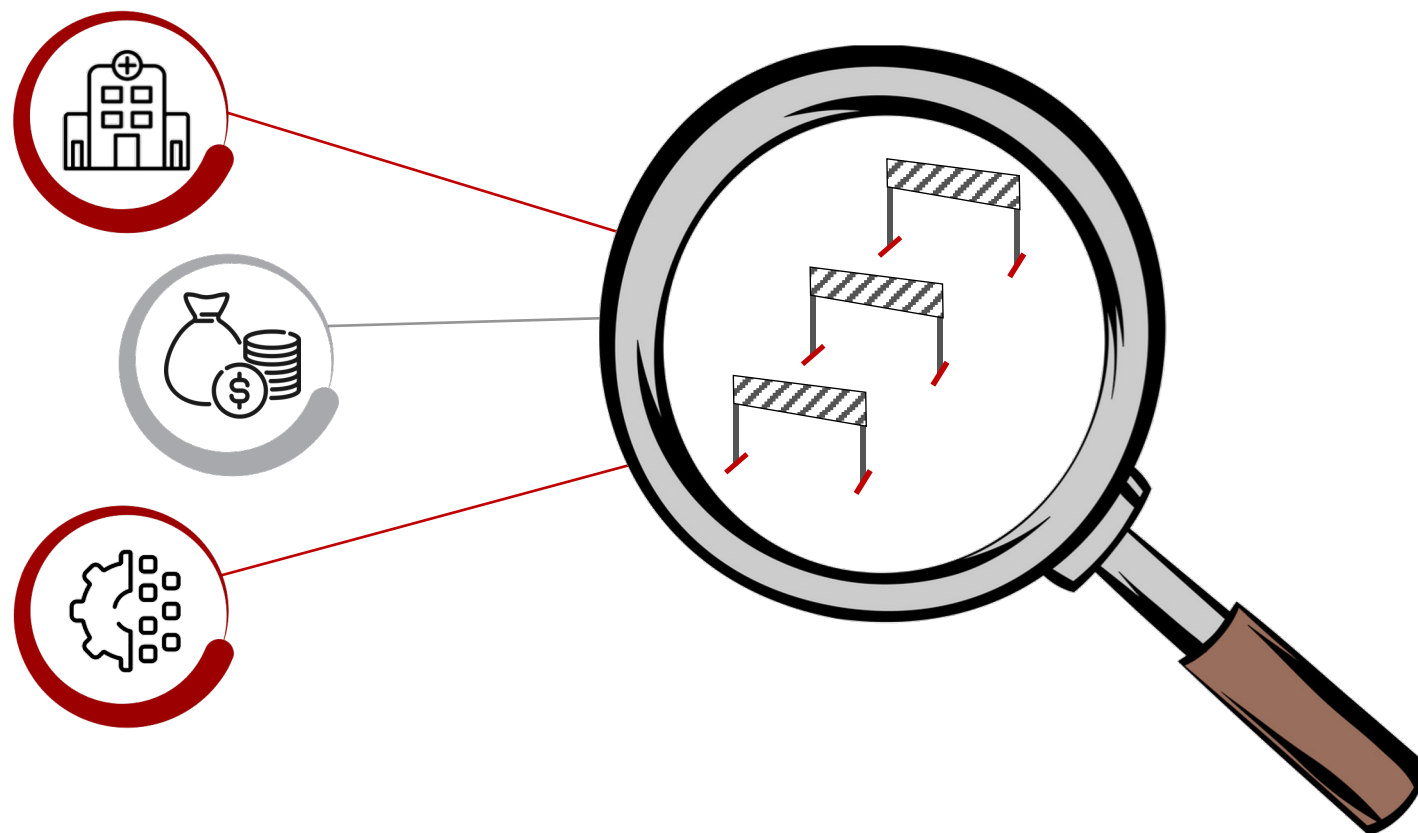
60% of German hospitals at stage 2 of EMRAM scale
36% fully introduced internal Wi-Fi
11% fully implemented EHR systems

Ranking of hurdles for digitalisation^{2,3}:

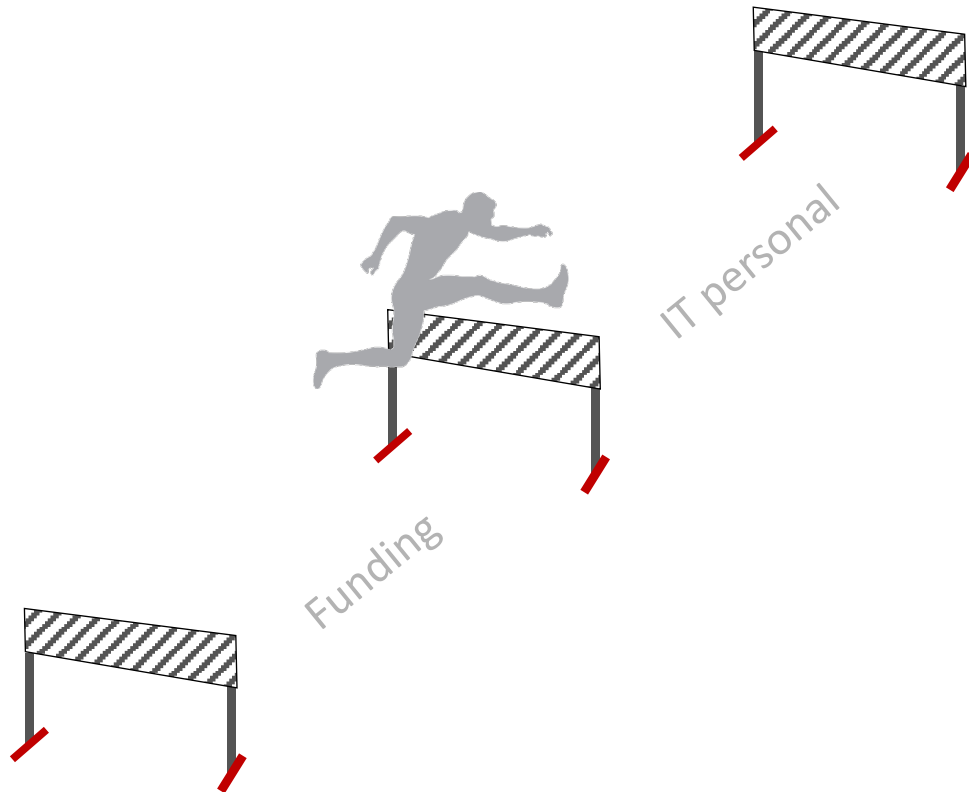
1. Lack of funding
2. Missing qualified IT-personal
3. Interpretability of IT-systems

Political will for digital transformation⁴:

Several national initiatives targeted on digital transformation in health system → e.g. hospital future act
Momentum through pandemic and market pressures

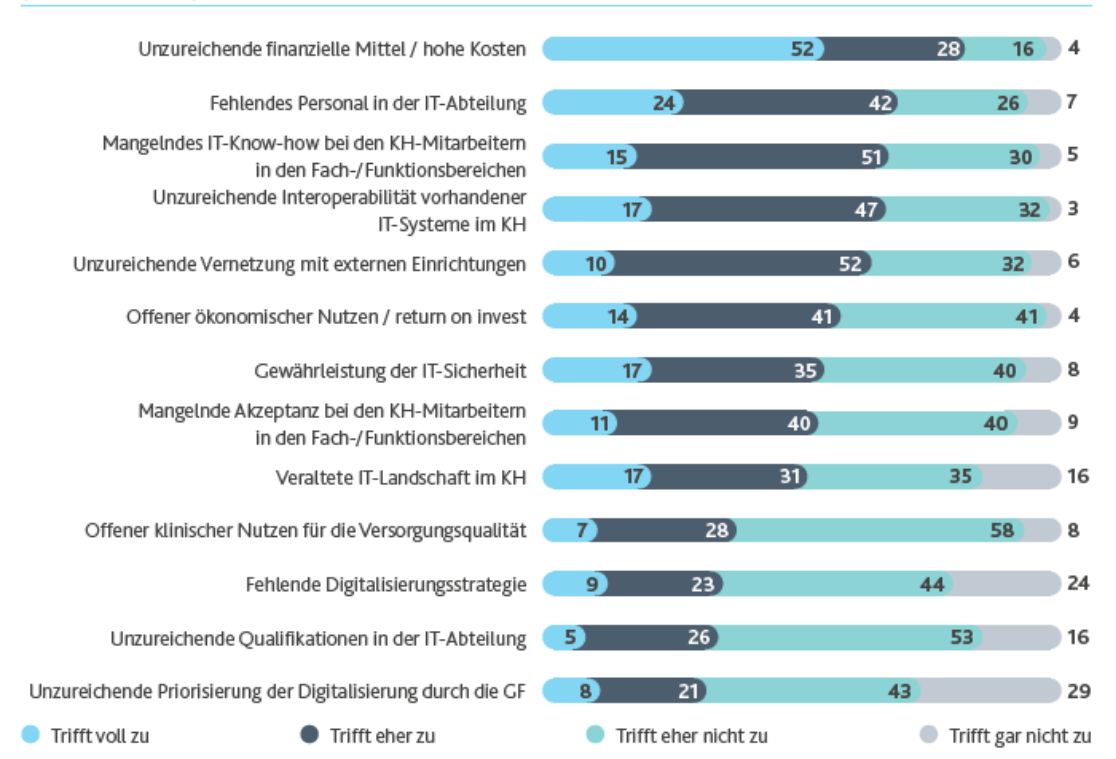


Key Issues for Digital Transformation



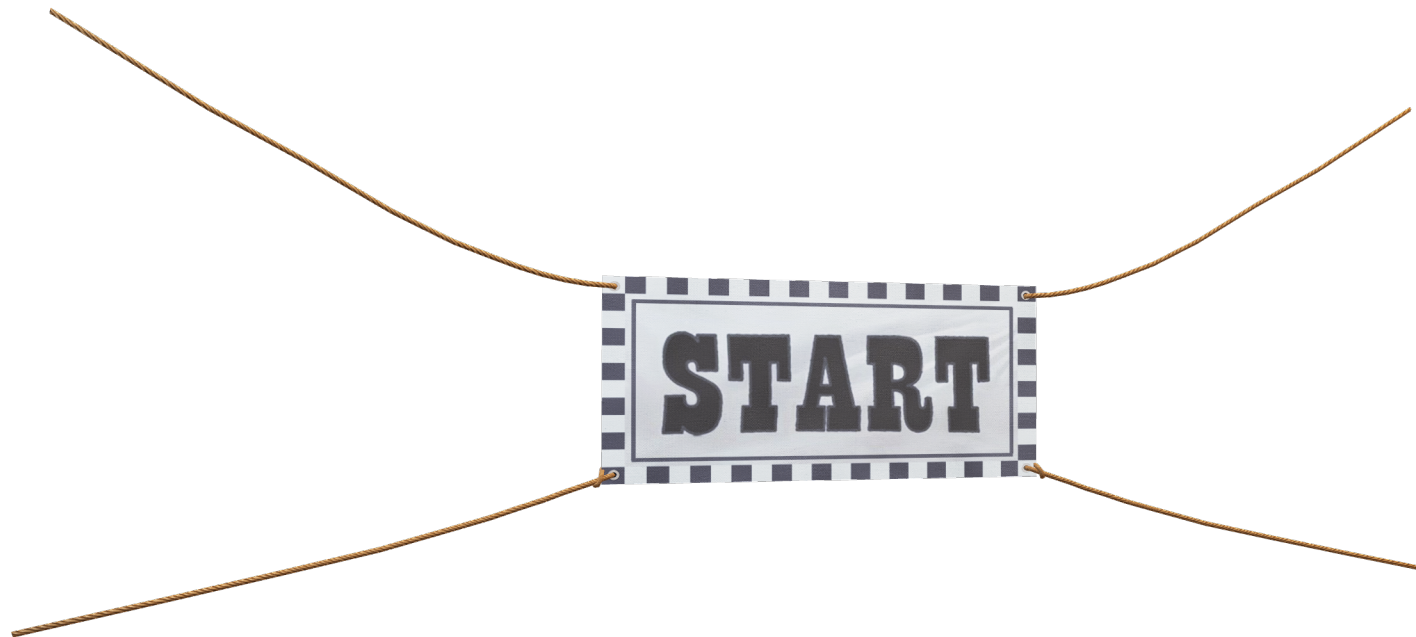
Was sind aus Ihrer Sicht zentrale Probleme und Herausforderungen bei der Digitalisierung Ihres Krankenhauses?

(Krankenhäuser in %)



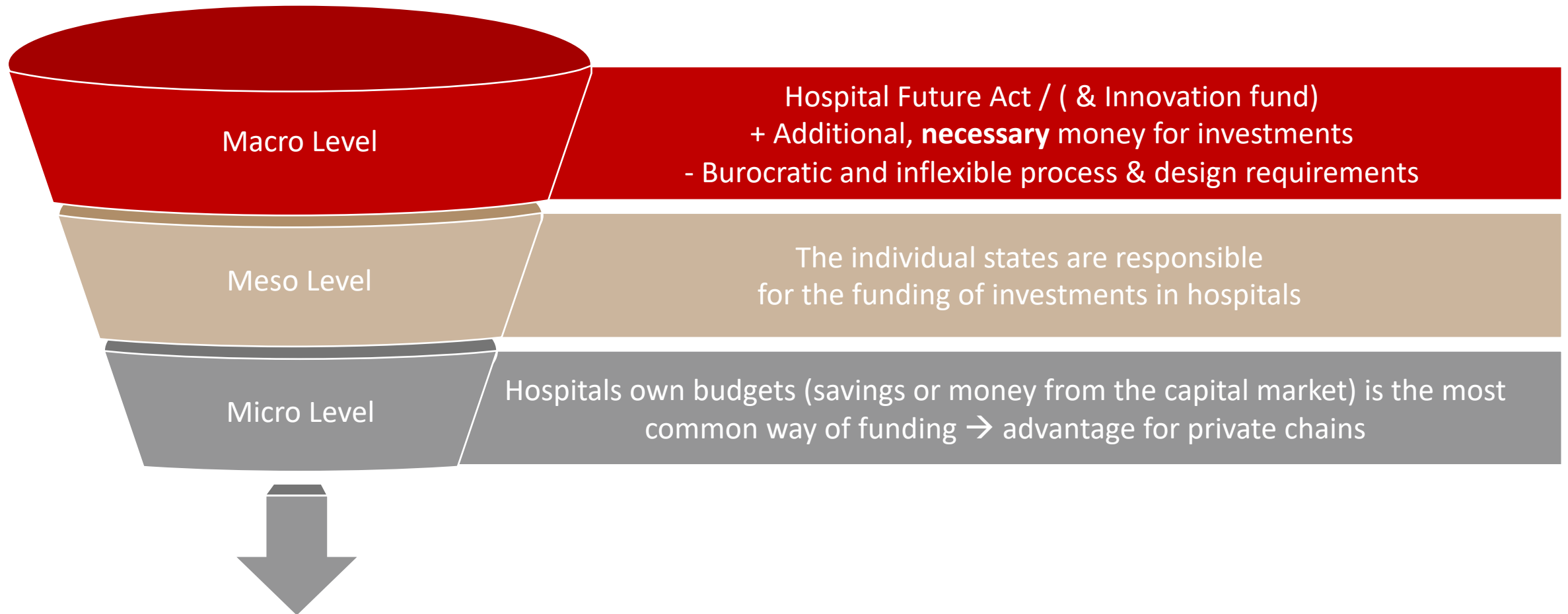
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How is digital health care now being implemented in Germany?



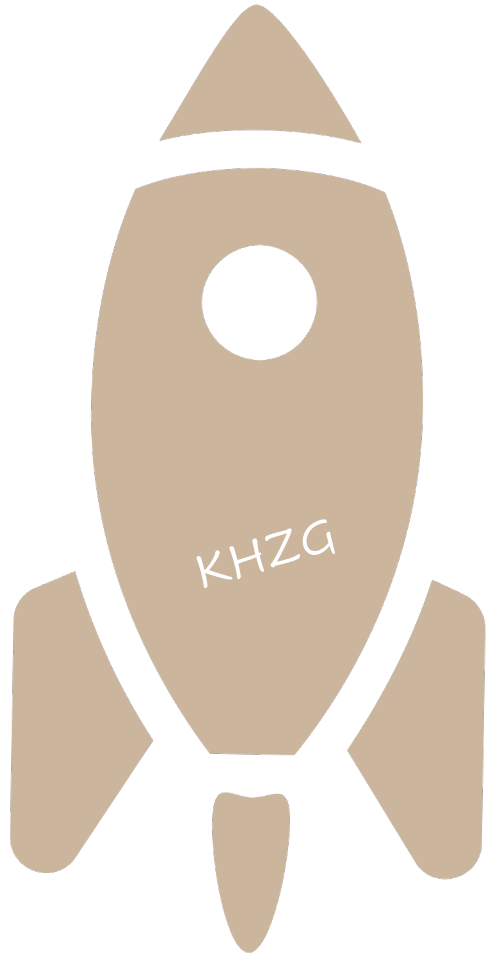
Funding of digitalization in German hospitals

Most projects are financed through the hospital's own funds



Hospital Future Act

The digital boost that hospitals in Germany needed – A beginning but not a solution for all problems



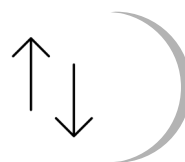
- **3 billion Euros** for digitalisation projects in hospitals
- Will be an opportunity for **smaller** hospitals to achieve a minimum digitalisation stage
- Projects funded through this fund need to be **interoperable with the hospitals EMR system** it will be therefore important to implement MMT systems with the common interfaces like HL7 or fire
- The states and/or the hospitals cover **30 percent** of the investment costs.
- Hospital will get **budget cuts** if they do not achieve a minimum digitalisation infrastructure by 2025

Application to the hospital context in one region

“Länder” (Regions) are responsible for the funding of investments in hospital infrastructure



Prioritization of digitalisation projects in Baden-Württemberg



Unofficially these funding programs are linked to specifications



Baden-Württemberg focuses their funding on hospital mergers



Projects which include the closure of hospitals are also prioritized

- 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!)



- New codes during the Covid-19 pandemic:
 - Monitoring of patients with a defibrillator or CRT system (introduced in 2016!)
 - Telemedical applications
 - Teleconsultation
 - Video consultation

On the fast-track to reimbursement: Germany unlocks business opportunities for digital health innovators

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Want to See the Future of Digital Health Tools? Look to Germany.

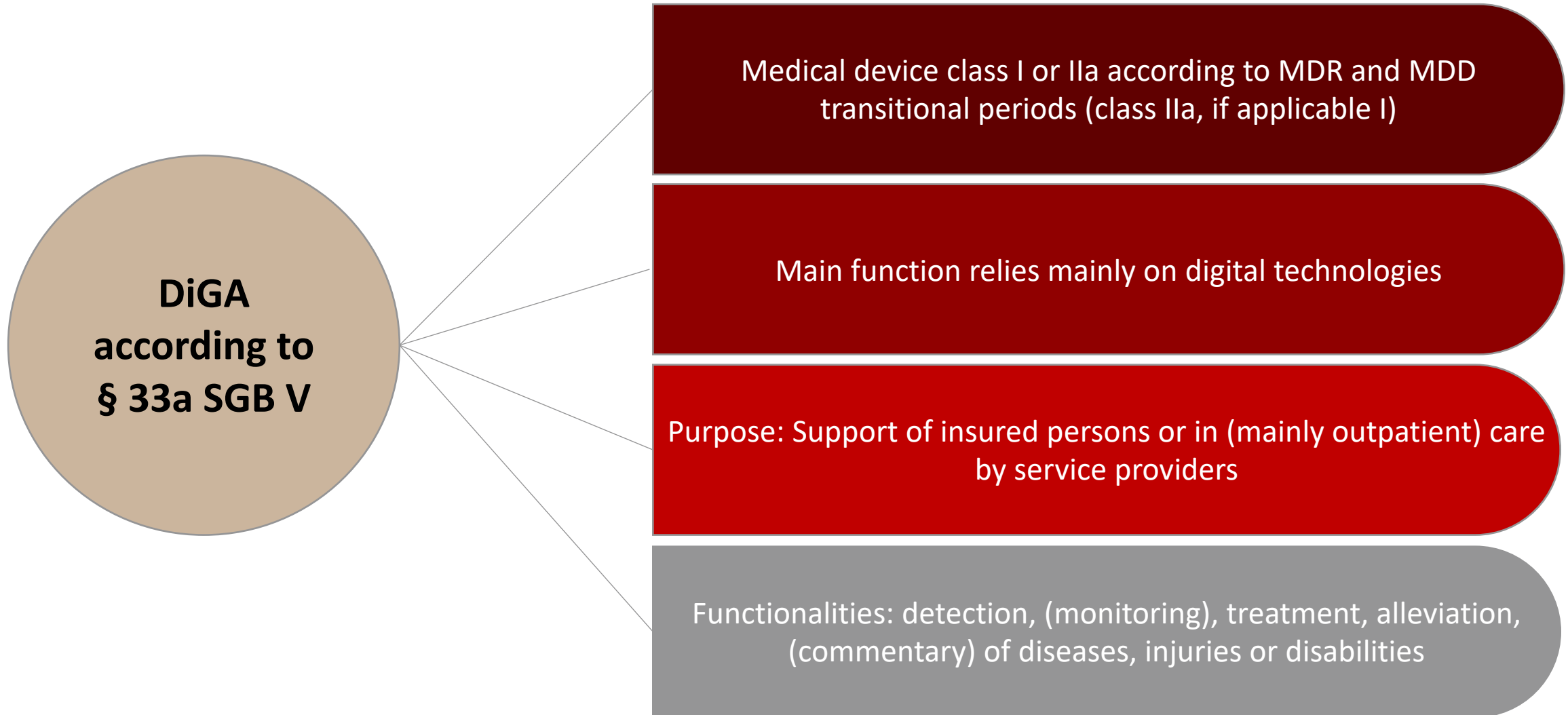
by Ariel D. Stern, Henrik Matthies, Julia Hagen, Jan B. Brönneke, and Jörg F. Debatin

December 02, 2020

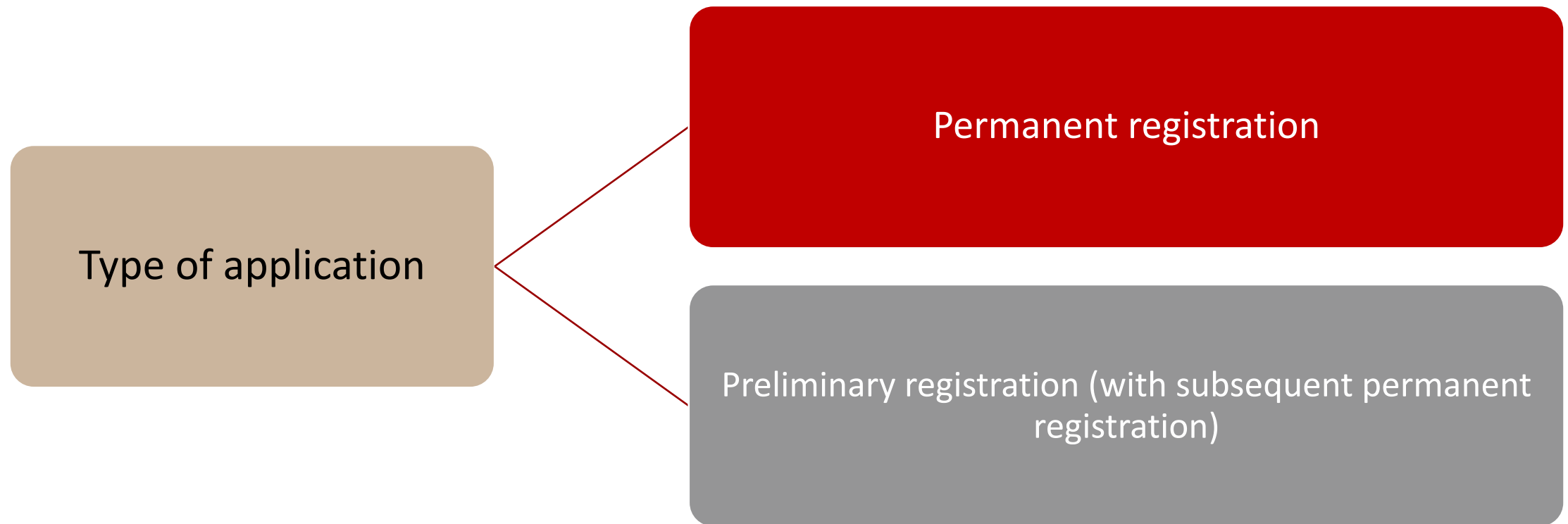


HBR Staff/Andrea Colarieti/EyeEm/Getty Images

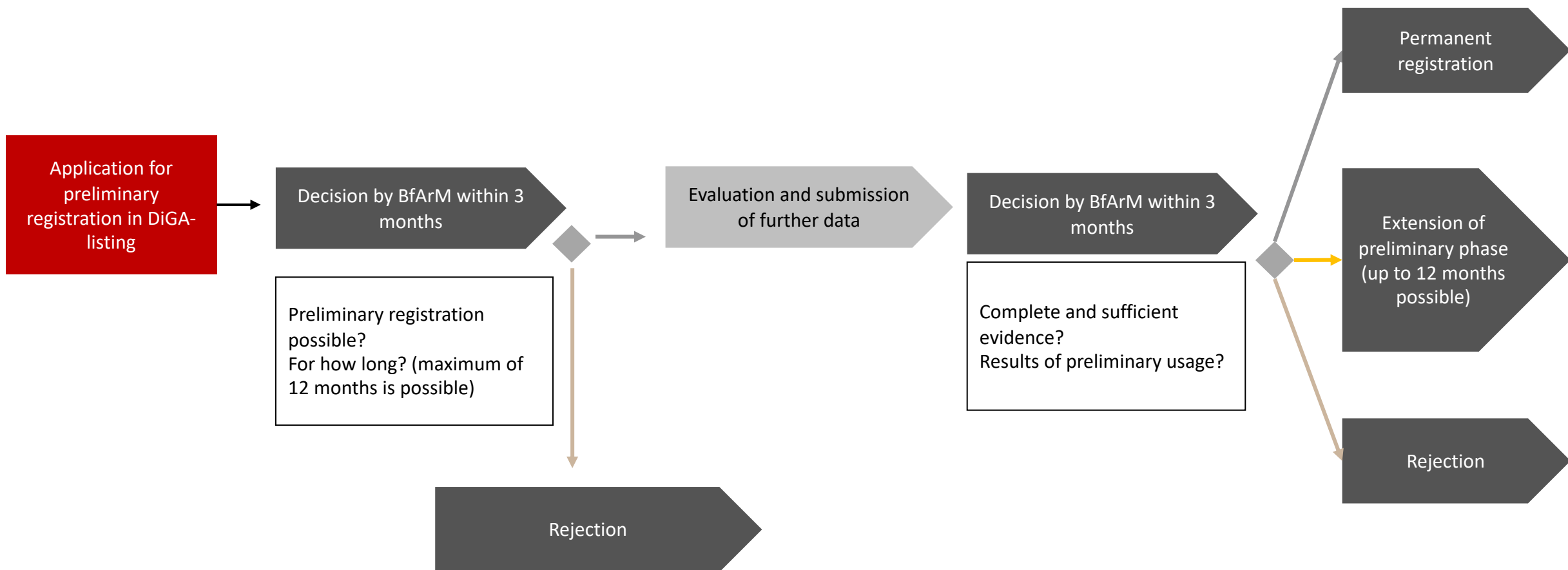
Definition: Digital Health Application („DiGA“)



Types of DiGA-listings



Process of preliminary registration in DiGA-listing

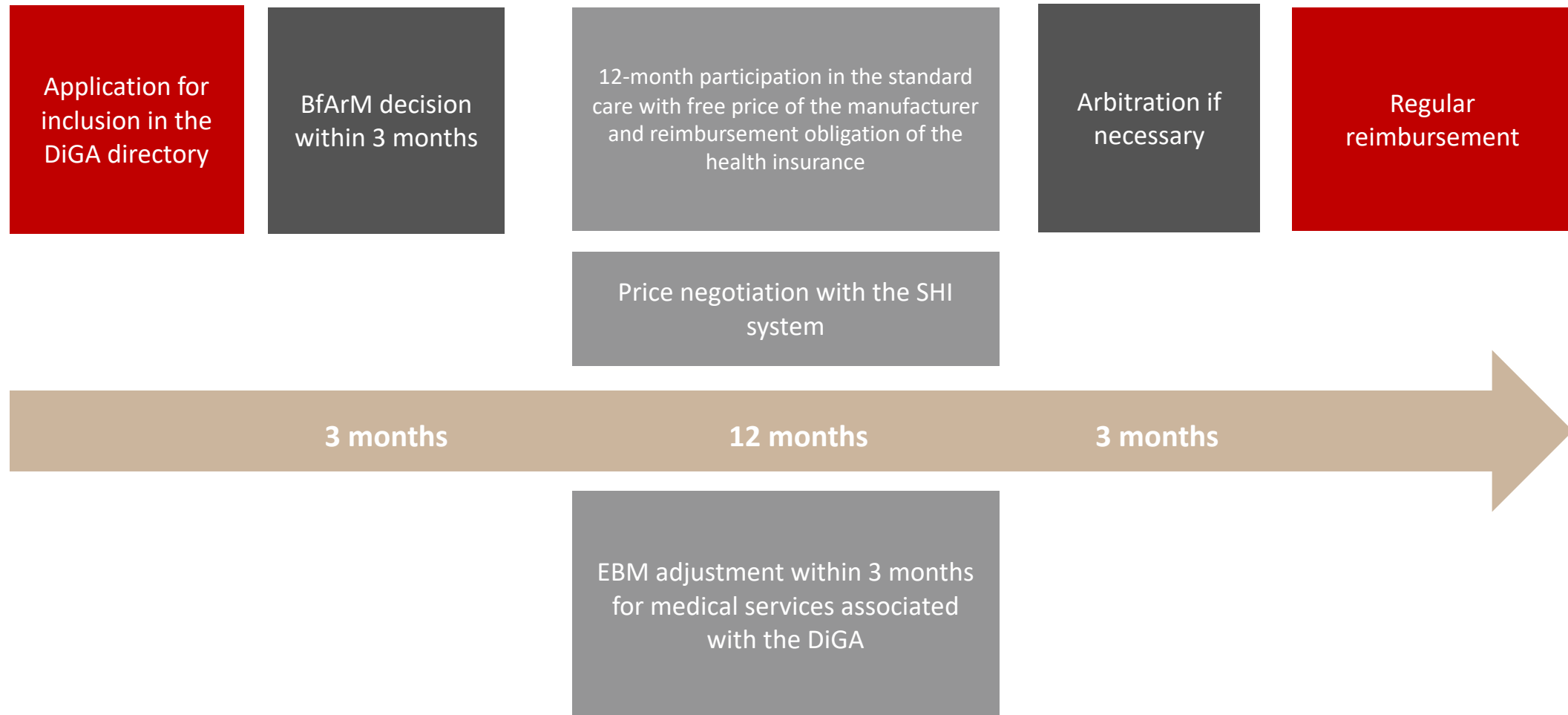


Legend



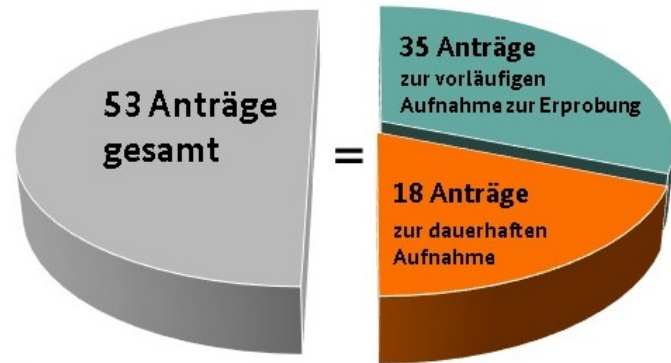
Decision requiring binding criteria

Time to reimbursement

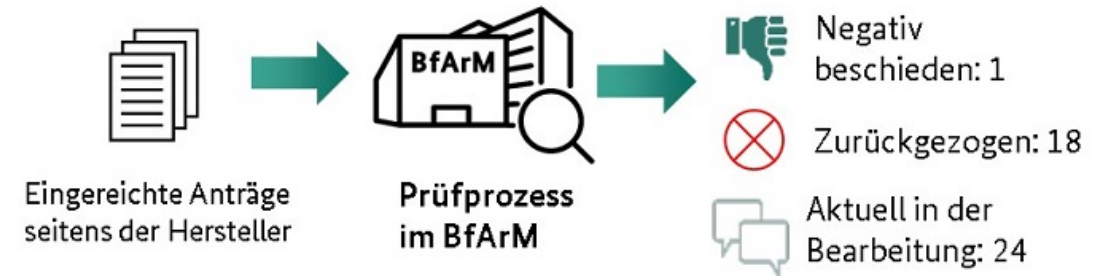


DiGAs successful?











Wie viele Anträge wurden seit dem Start des DiGA-Antragsportals zur Prüfung beim BfArM eingereicht?








Was ist das Ergebnis zu den bisherigen Prüfungen der Anträge im BfArM?



For what are these 10 DiGAs available?

DiGA	Company	Indication	Permanent inclusion	Preliminary inclusion	Evidence	Price (gross)
	GAIA	Multiple Sclerosis			RCT in Germany ^a	€ 743.75 (prescription period of 90 days)
	Sympatient	Agoraphobia, Social phobias, Panic disorder			RCT planned	€ 428.40 (one-off costs)
	mynoise	Tinnitus aurium			German study planned	€ 116.97 (prescription period of 90 days)
	Newsenselab	Migraine			German RCT planned	€ 219.99 (prescription period of 90 days)
	Rehappy	Cerebral transient ischaemia, Subarachnoid haemorrhage, ...			Study planned	€ 449.00 (prescription period of 90 days) € 299 (for further 90 days)

For what are these 10 DiGAs available?

DiGA	Company	Indication	Permanent inclusion	Preliminary inclusion	Evidence	Price (gross)
 somnio das digitale Schlaftraining	mementor	Non-organic insomnia	X		RCT in DACH countries ^a	€ 464.00 (prescription period of 90 days)
 Selfapy	Selfapy	Depression		X	German RCT planned ^b	€ 540.00 (prescription period of 90 days)
 velibra	GAIA	Social phobias, Panic disorders, Generalised anxiety disorder, ...	X		RCT in DACH countries ^c	€ 476.00 (prescription period of 90 days)
 ViViRA	Vivira Health Lab	osteocondrosis, gonarthrosis, non-specific knee pain, koxarthrosis, ...		X	Retrospective study ^d	€ 239.97 (prescription period of 90 days)
 zanadio	aidhere	Obesity		X	RCT planned	€ 499.80 (prescription period of 90 days)

- a. [https://www.zora.uzh.ch/id/eprint/157067/1/randomized controlled trial to test the efficacy of an unguided online intervention with automated feedback for the treatment of insomnia.pdf](https://www.zora.uzh.ch/id/eprint/157067/1/randomized%20controlled%20trial%20to%20test%20the%20efficacy%20of%20an%20unguided%20online%20intervention%20with%20automated%20feedback%20for%20the%20treatment%20of%20insomnia.pdf)
- b. https://www.drks.de/drks_web/navigate.do?navigationId=trial.HTML&TRIAL_ID=DRKS00017191
- c. <https://www.cambridge.org/core/journals/psychological-medicine/article/abs/effects-of-a-transdiagnostic-unguided-internet-intervention-velibra-for-anxiety-disorders-in-primary-care-results-of-a-randomized-controlled-trial/88E13C63F3C601D46A62C88E11EAB9F7#>
- d. https://www.drks.de/drks_web/navigate.do?navigationId=trial.HTML&TRIAL_ID=DRKS00021785 & Prospective RCT, retrospective study and meta-analysis planned

So, is it now a rocket or a bluff?



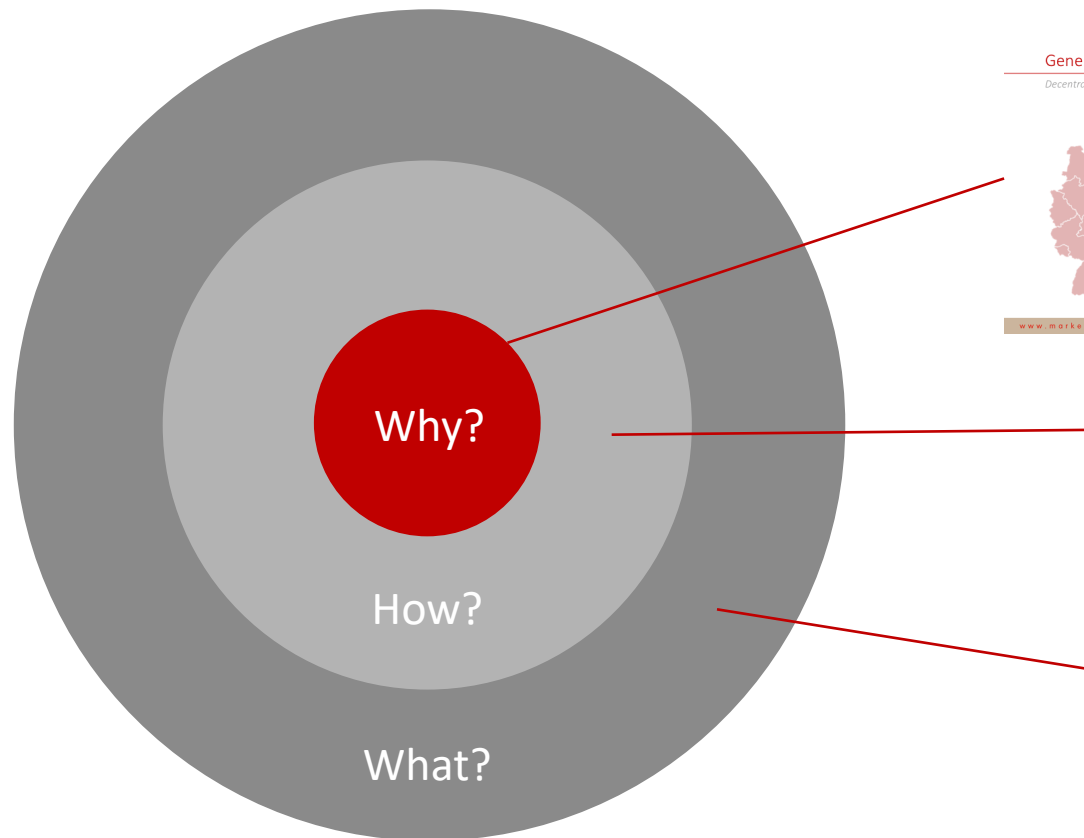
Die **Gesundheitskasse**
für Sachsen und Thüringen.



Dr. Ulf Maywald
AOK Plus

Conclusions

Digitalization has strongly picked up in the German health care system, but if it will be a success story would still need to be proven!



General hurdles for Market Access in Germany

Decentralised structure and strict separation between in- and outpatient sectors

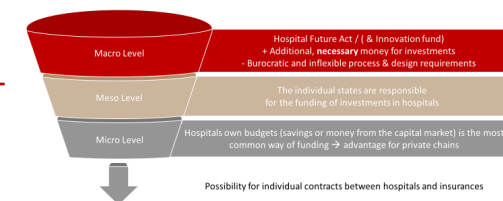


- 103 Individual health insurance funds
- 17 associations of statutory health insurance physicians and 16 "Länder" (Regions)
- Strict separation of in- and outpatient sector with different regulations and very limited integration
- Diverse hospital landscape with private hospitals, big university hospitals and smaller clerical hospitals

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Funding of digitalization in German hospitals

Most projects are financed through the hospital's own funds



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DiGAs successful?



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<https://www.bfarm.de/Presse/Pressemitteilungen/2021/01/2021-01-20-DiGAs-Status>

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