

MArS Webinar:

German elections ahead – potential outcomes and its implications on healthcare market access

29th July 2021

Dr. Stefan Walzer
Lutz Vollmer

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

THE German-speaking market access experts - Austria, Germany, Switzerland





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Virtual Reality Negotiation Training Increases Negotiation Knowledge and Skill

Joost Broekens¹, Maaïke Harbers¹, Willem-Paul Brinkman¹,
 Catholijn M. Jonker¹, Karel Van den Bosch³, and John-Jules Meyer²

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² Utrecht University
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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

Register already now for our next webinar!



Webinar Calendar



Bibiane Schulte-Bosse
Laywer at Straeter law firm

26.08.2021

**Price negotia-
tions in Germany**
– live and let die
or die hard?



Dr. Thorsten Peske
SanaSolutions

30.09.2021

**There is more than
Mozart, Sissi and
Sacher cake!**
**The pragmatic reim-
bursement pathways
in Austria?!**

at 9pm CET / 12am PT



Dr. Mathias Perleth
G-BA

27.10.2021

**The good, the bad,
the ugly!?**
– **Experimental
coverage in
Germany**

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.
- As always, slides will be provided afterwards, and the video will be published on our website.



The mystic arbitration board!? MARS Webinar

🕒 ⌚
Später ans...
Teilen

The end in drug price negotiations in Germany? The "mystic" arbitration board?!



Market Access &
Pricing Strategy GmbH



Dr. Stefan Walzer
Speaker



Prof. Dr. Jürgen Wasem
Former Head of arbitration board



Lutz Vollmer
Moderator

REGISTER

27.05.2021
9pm CET /
12am PT

Ansehen auf YouTube

1 / 4 Next »

The end in drug price negotiations in Germany?
The "mystic" arbitration board?!



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The mystic arbitration board!? MARS Webinar

Access to German hospitals
pathways to follow



Dr. Stefan Walzer
Speaker

Will Waelner
Medical Director of Hiltrop

Lutz Vollmer
Moderator

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29.04.2021
9pm CET /
12am PT

Access to German hospitals pathways to follow. MARS Webinar

10 years AMNOG
what have we learnt for drug development and pricing?



Dr. Stefan Walzer
Speaker

Lutz Vollmer
Moderator

Prof. Dr. Thomas Hommerschmidt
University of Applied Sciences Bielefeld

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25.03.2021
9pm CET /
12am PT

10 years AMNOG – what have we learnt for drug development and pricing?



Webinar verpasst?

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Our presenters and discussants today



Dr. Stefan Walzer
Speaker



Lutz Vollmer
Moderator



Prof. Dr. Uwe Wagschal
University Freiburg i. Brsg.

MArS Webinar:

German elections ahead – potential outcomes and its implications on healthcare market access

There will be a new chancellor in Germany in 2021

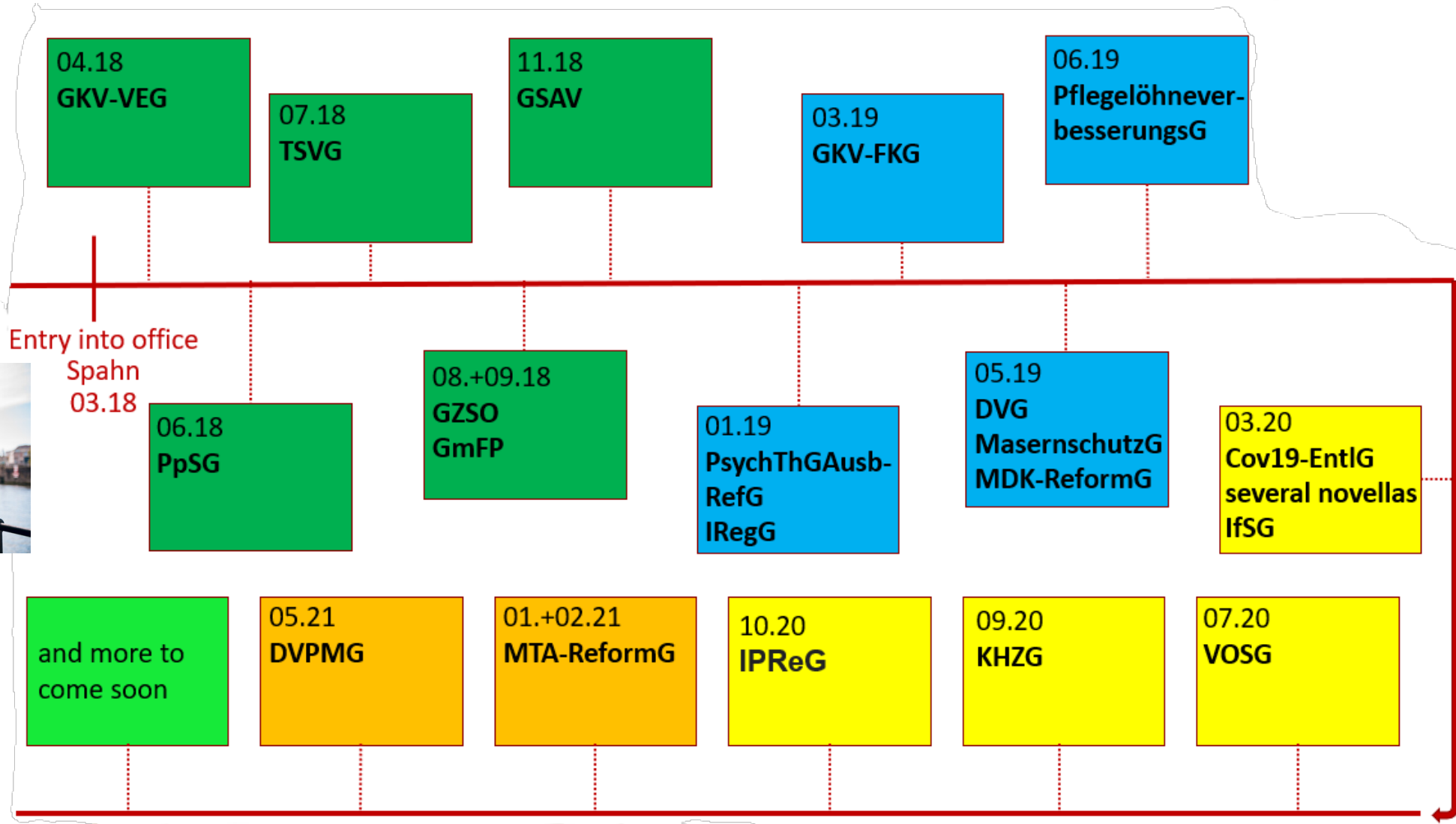
What You Need to Know About Germany's National Election

Germans will vote on a new government in September, one without Angela Merkel, who will step down after 16 years in power.

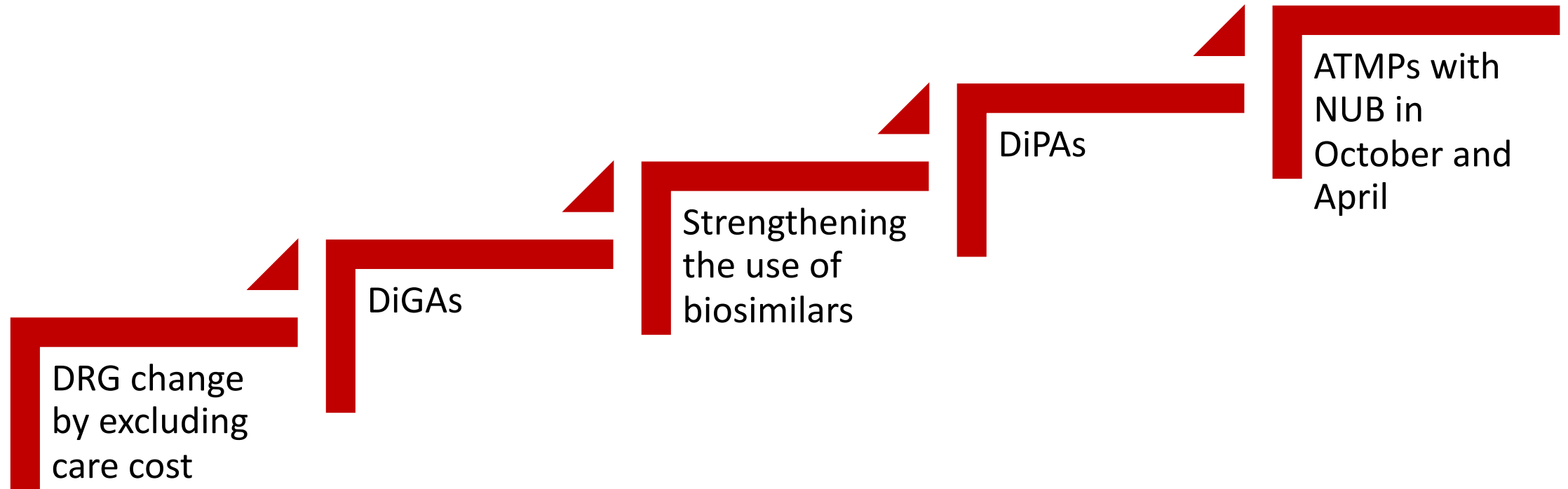


<https://www.nytimes.com/article/germany-national-election.html?searchResultPosition=1>

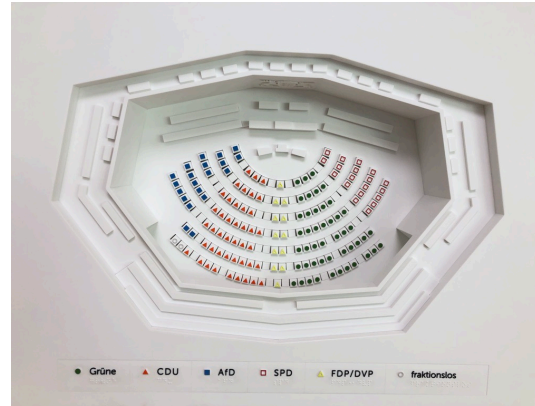
Spahn's Laws



Market access impact until 2021



What can be expected at the elections in autumn 2021?



Change of interest of voters?!

- Two issues have gained attention through Corona:
 - The health system, from the capacity of clinics to the profitable patent system in vaccines and medicines.
 - The question of the need for state investment and its financing.
- If the pandemic did not exist, the health system would not be at the forefront of debates.

Our guest tonight

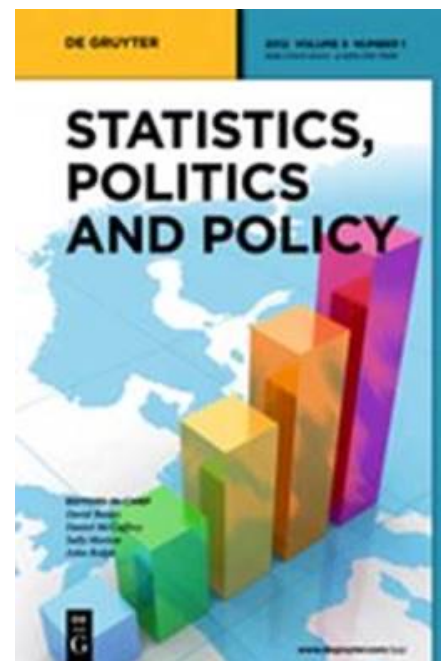
Prof. Dr. Uwe Wagschal
Seminar für Wissenschaftliche Politik
Universität Freiburg



Prof. Dr. Uwe Wagschal
University Freiburg i. Brsg.



Chair of Comparative Politics



VoteSwiper

About this project

📍 > Germany

Elections in Germany

Prof. Dr. Uwe Wagschal

Seminar für Wissenschaftliche Politik

Universität Freiburg

29.07.2021

Presentation at the
MArS Market Access & Pricing Strategy GmbH

*German Elections ahead
Potential Outcomes and its Implications for
Health Care Market Access*

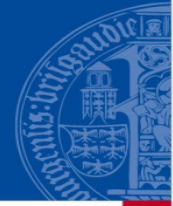




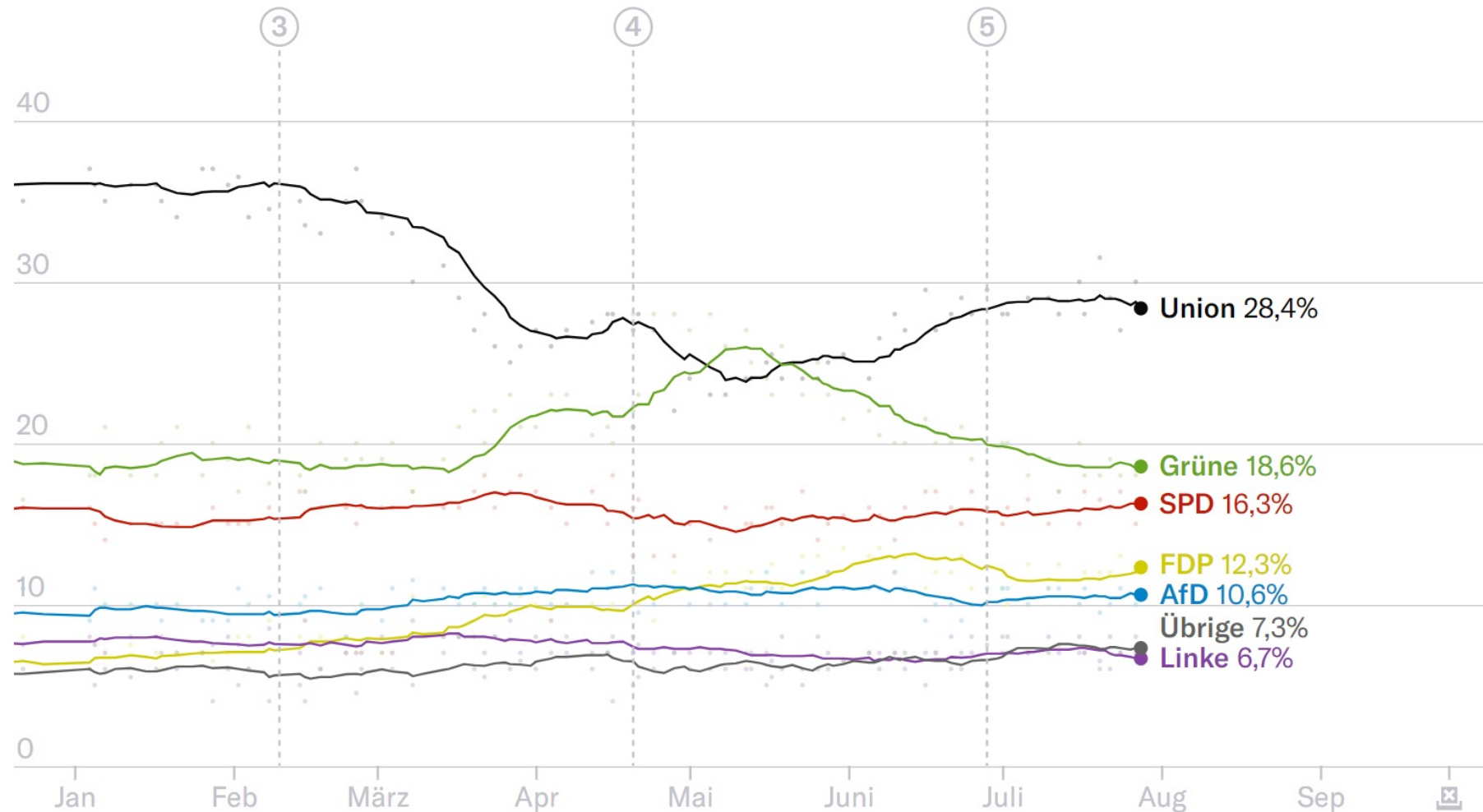
1. German Elections 2021 - Introduction
2. Electoral System
3. Party Identification
4. Candidates
5. Subjects – Themes - Programme
6. Government Formation: Which Coalition
7. Public Policy Implications – Public Health
8. Conclusion

(1) Current Situation (07/2021)

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(2) Electoral System

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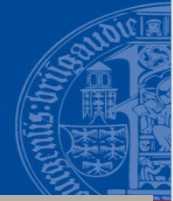


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- Two Votes: 1st vote 299 Electoral District Seats ;
2nd vote: Party list; splitting of votes possible
- 5%-Threshold
- The electoral law has a compensatory mechanism, which tend to increase the number of seats in Parliament (currently 598 to 709 seats).
- The original nation-wide proportion of second vote shares is achieved by increasing the size of the Bundestag until that proportion is reached
- The additional mandates due to the increase are then distributed on the parties in the Länder
- Very Proportional Electoral System

Distribution First Votes (2017)

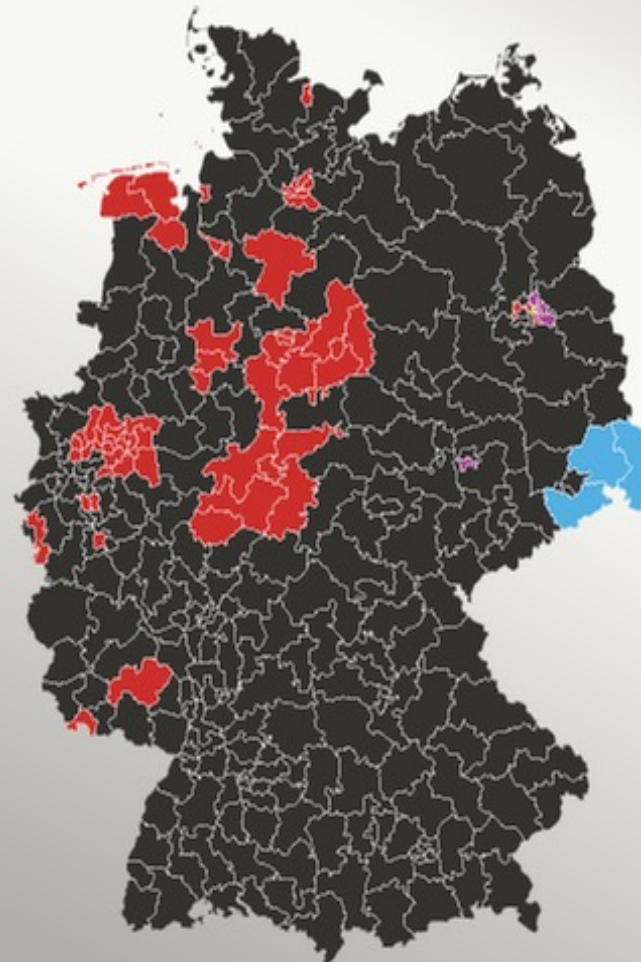
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Wahlkreise Direktmandate

Bundestagswahl 2017



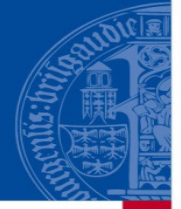
- Afd
- SPD
- Linke
- Union
- Grüne

Quelle: Bundeswahlleiter

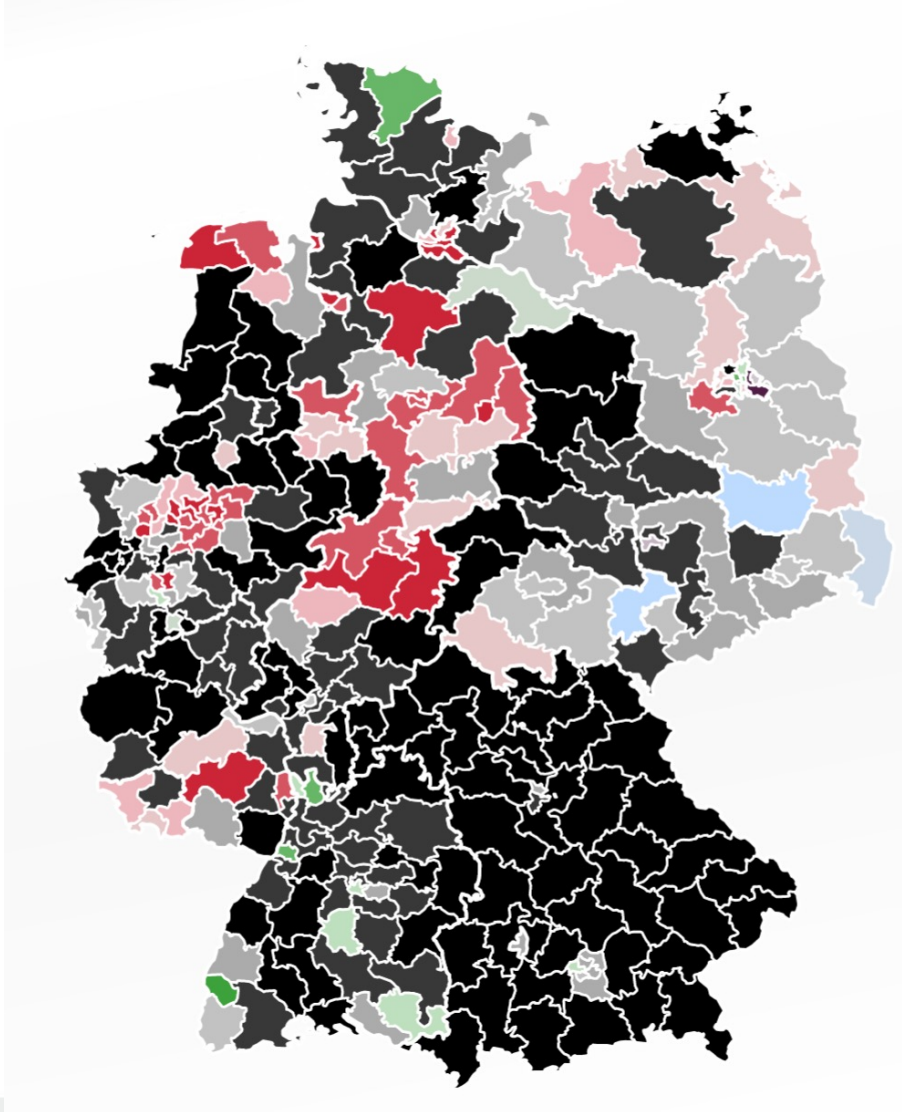


Projection Constituencies (first vote) 07/2021

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Vote Distribution Federal Elections (2017, 2nd vote)

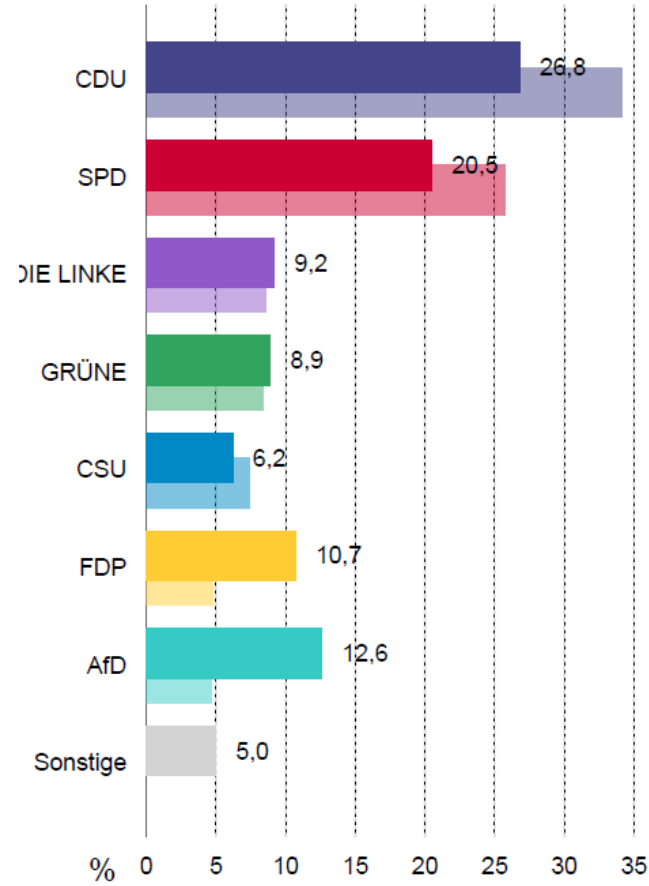
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Zweitstimmen

Bundestagswahl 2017, Deutschland
Endgültiges Ergebnis

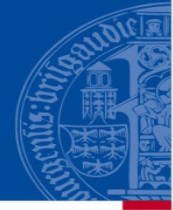


■ Bundestagswahl 2017
■ Bundestagswahl 2013

© Der Bundeswahlleiter, Wiesbaden 2017

Relevant for public health: Increasing voter age

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Increase of pensions in the year before elections: 2,34%

Increase of pensions in election years: 1,77 Prozent

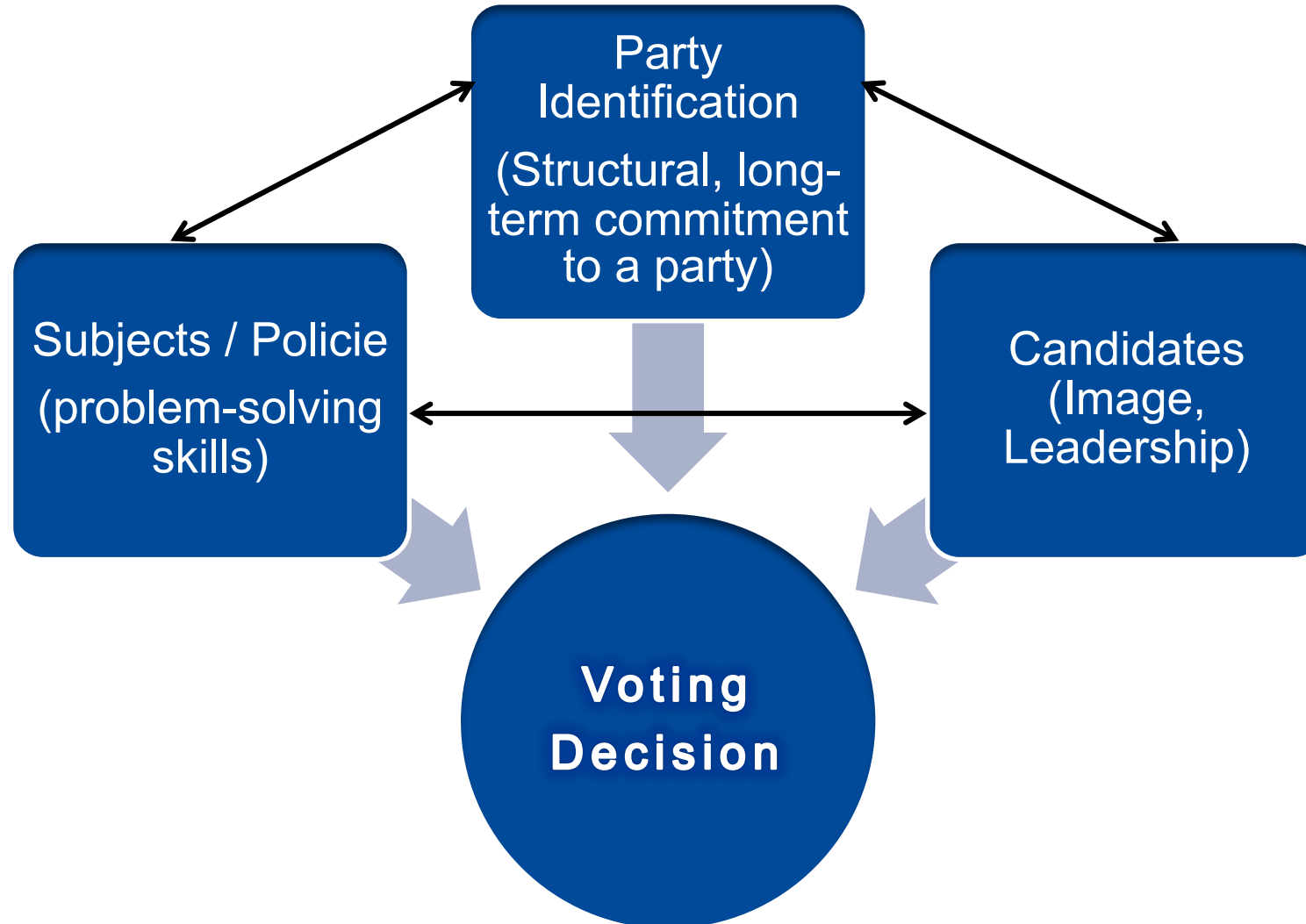
Increase of pensions in the year after elections : 1,06 Prozent

Socio-psychological model of voting

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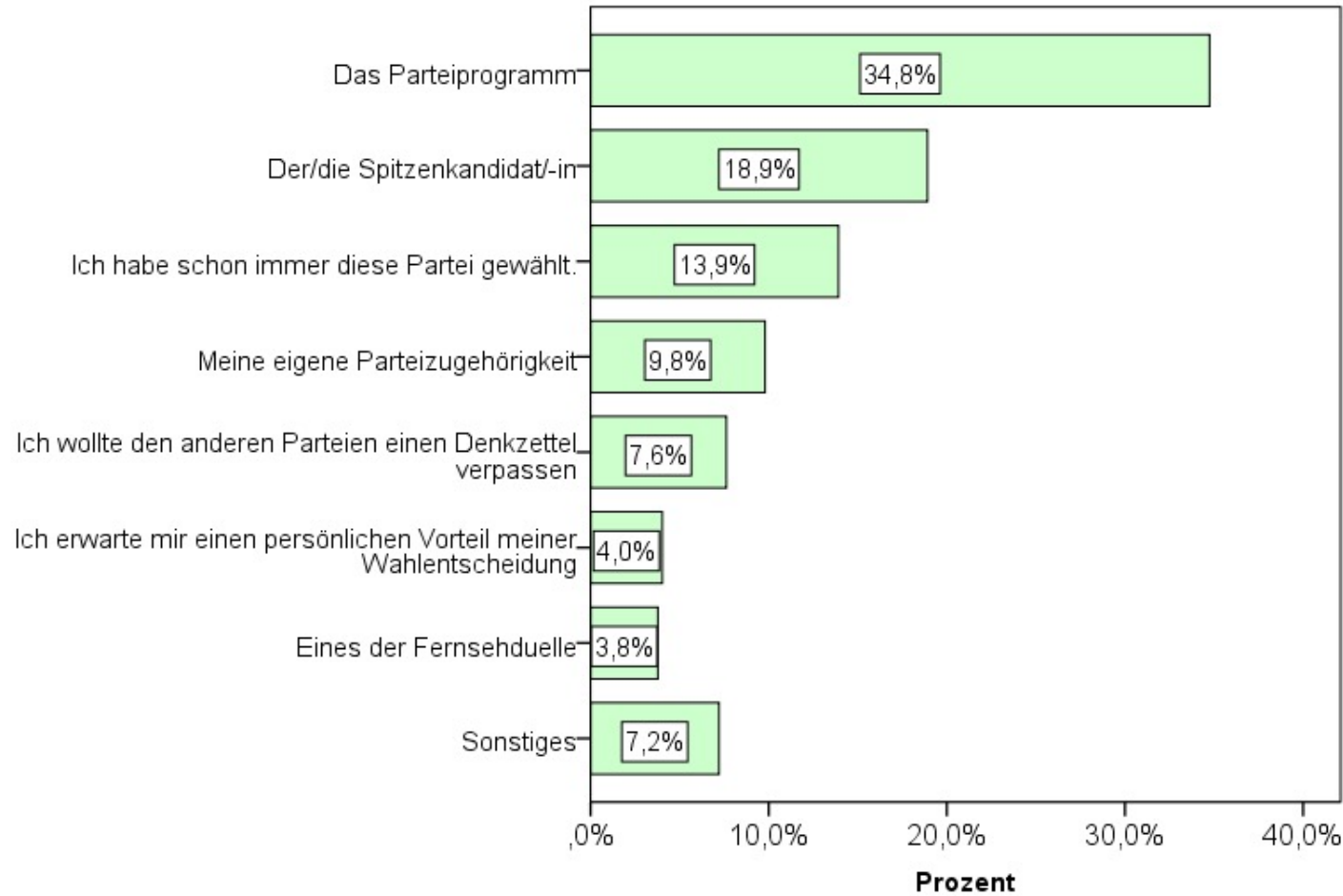
Most important factors for voting decision

Politik Panel Deutschland (2017; n = 4798)

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Was war der wichtigste Grund für Ihre Wahlentscheidung?

Party Identification (PI)

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- Party identification is a long-term stable affective attachment to a political party, which is acquired in an early phase of political socialisation and intensifies throughout life.
- Party ties become rarer in society (dealignment)
- Population groups turn away from one party and towards another (realignment)
- In Germany: party identification is more stable than issue and candidate orientation

Importance of Candidates

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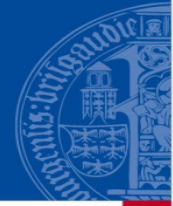


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- Candidates gain in importance with the erosion of party loyalty
- Among party supporters, candidate orientation is often colored by party loyalty, while non-partisans are more predisposed to candidate-oriented voting behaviour.
- With increasing medialization and decreasing Party Identification, candidates become more important
- Winfried Kretschmann, Petra Roth, Ole van Beust, Diepgen have also succeeded in "adverse" milieus.

Rating of Politicians

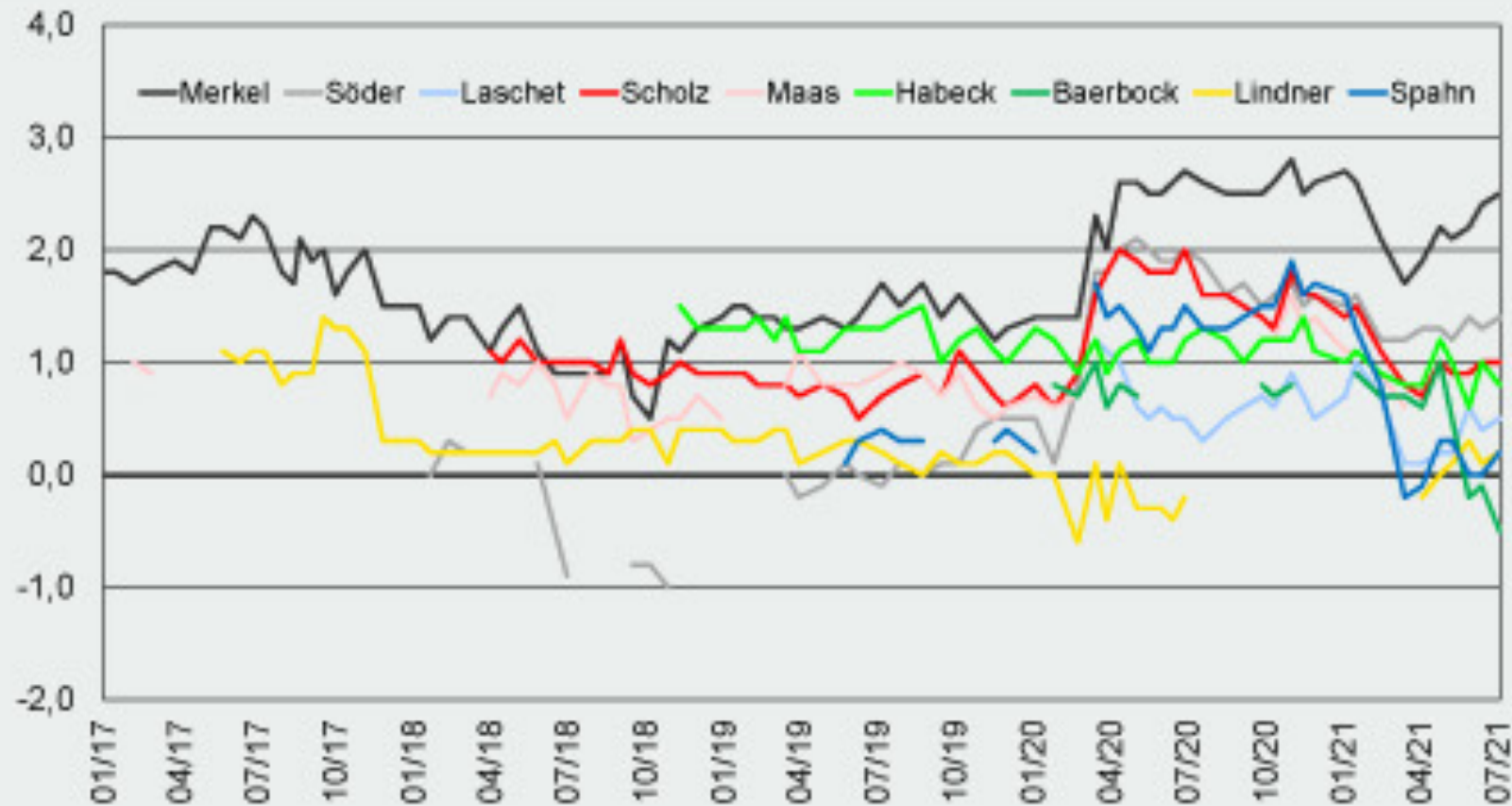
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Bewertung von Politikern nach Sympathie und Leistung seit 01/2017 (Mittelwerte auf einer Skala von +5 bis -5)

FORSCHUNGSGRUPPE
WAHLEN E.V.

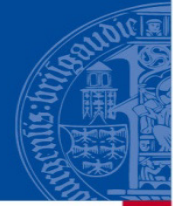




- Issues: political questions (all questions relating to government policies) or controversial questions.
- General issues play a greater role than specific issues in the electoral decision.
- The importance of issues increases with the level of education and information of the citizen.
- Voting for parties with clearly profiled issue statements are more strongly influenced by issue orientations.

Most important problems

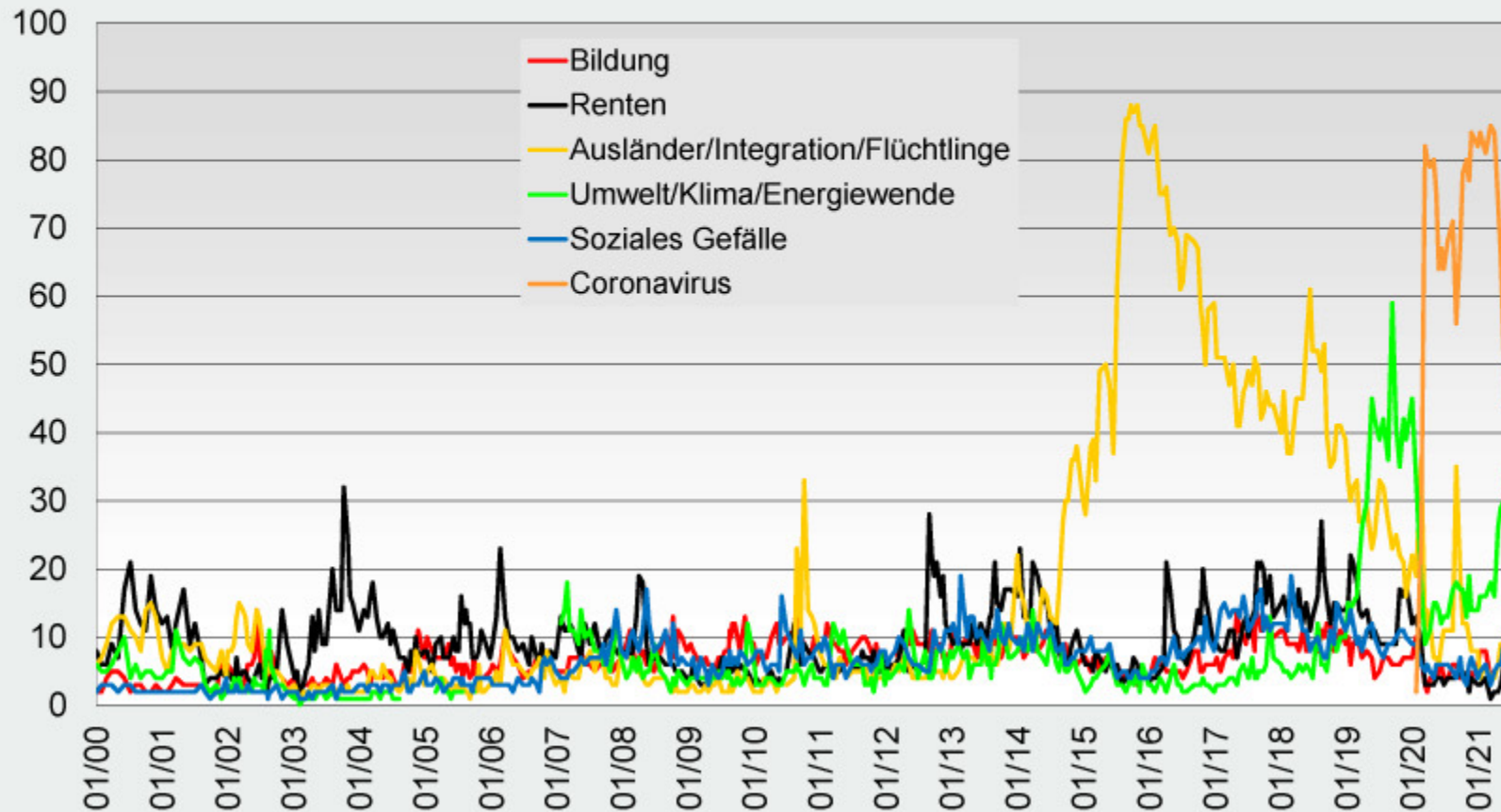
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Wichtige Probleme in Deutschland – I seit 01/2000 (max. zwei Nennungen)



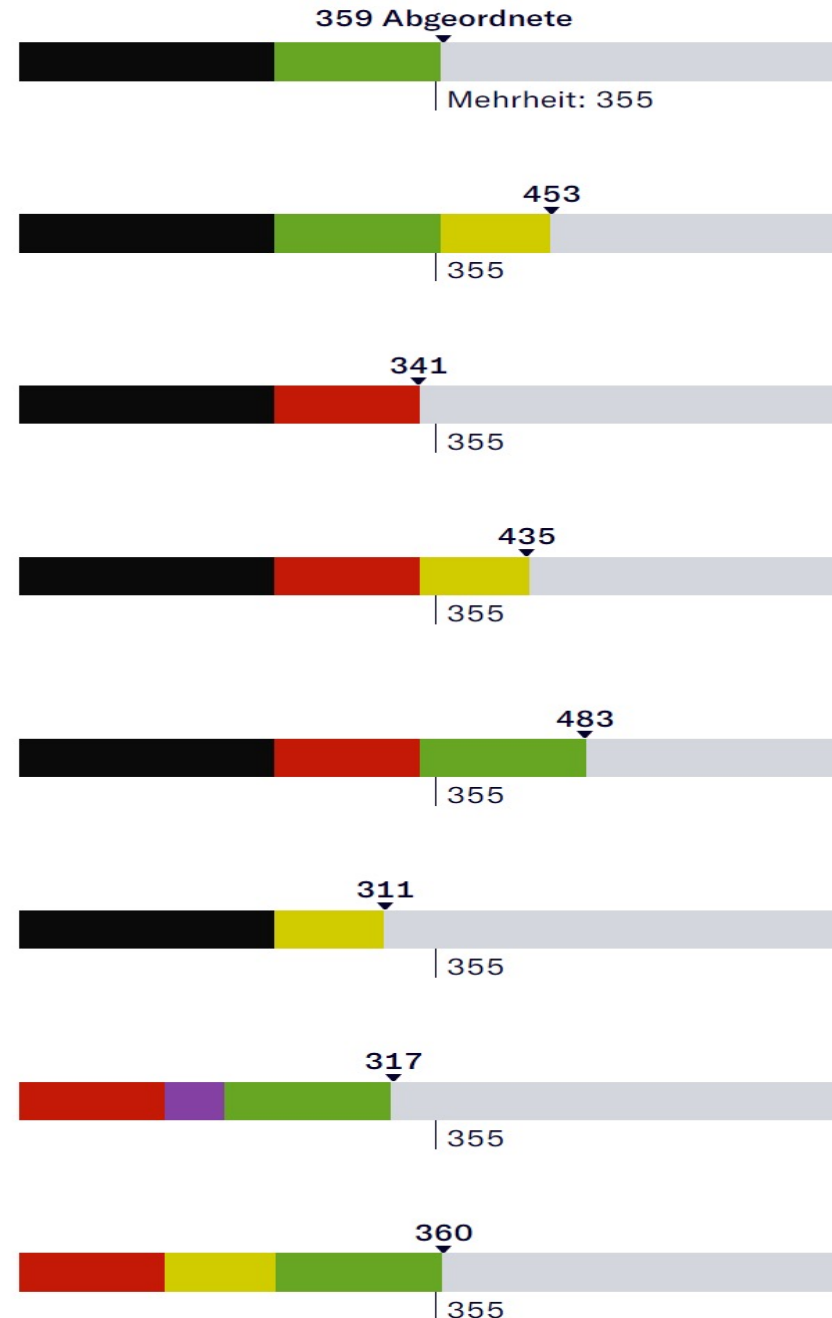
Which Coalition will be formed? The Color Game

Theories of coalition formation:

- a. Office oriented**
- b. Policy oriented**

Highest Probability:

1. CDU/CSU – Grüne
2. CDU/CSU – Grüne – FDP
3. CDU/CSU – Grüne – SPD
4. Grüne – SPD – FDP
5. CDU/CSU – SPD – FDP
6. SPD – Grüne – FDP

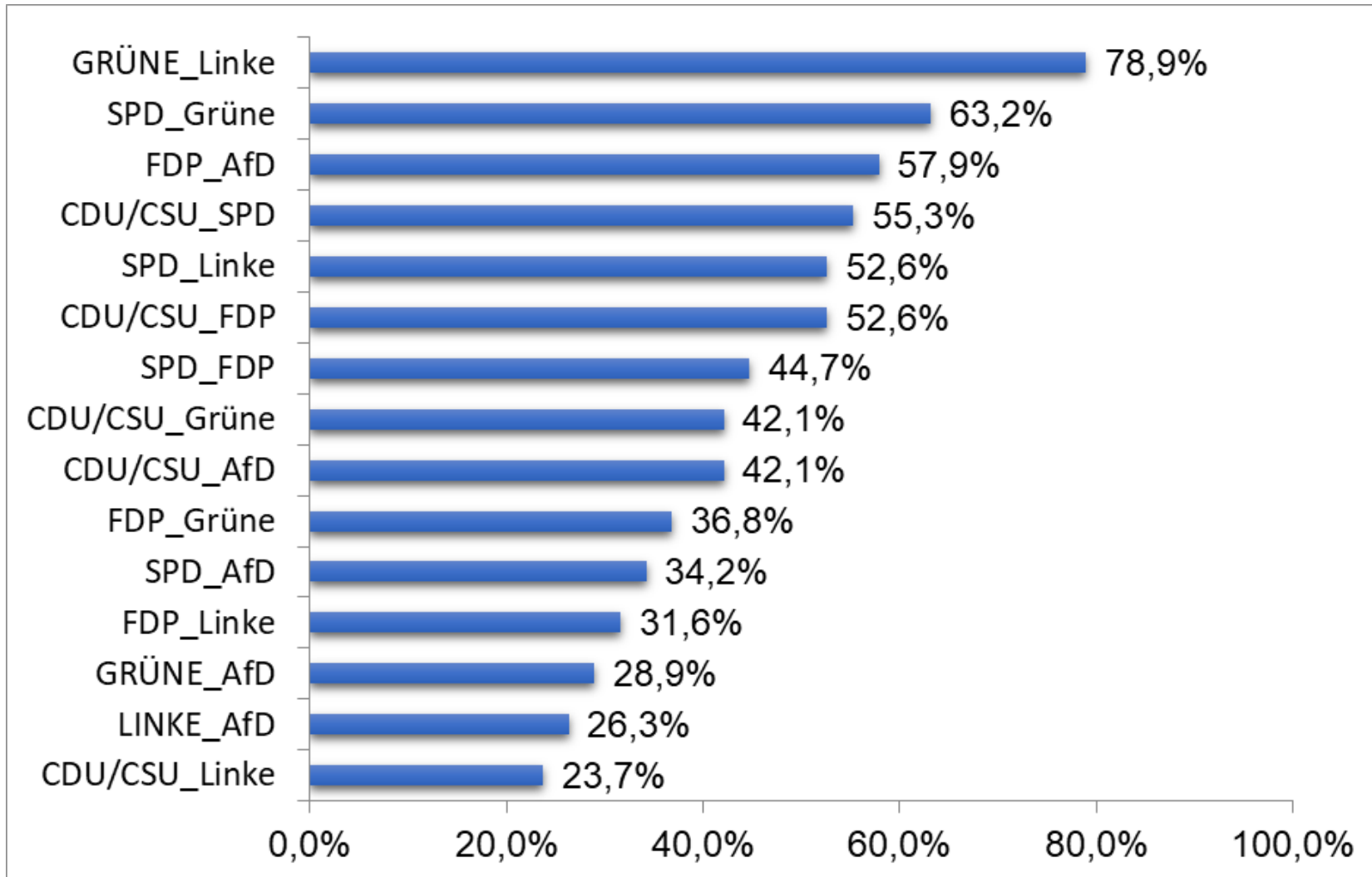


Similarities Percentage agreement of the parties on the questions of the Wahl-O-Mat for the Bundestag election 2017

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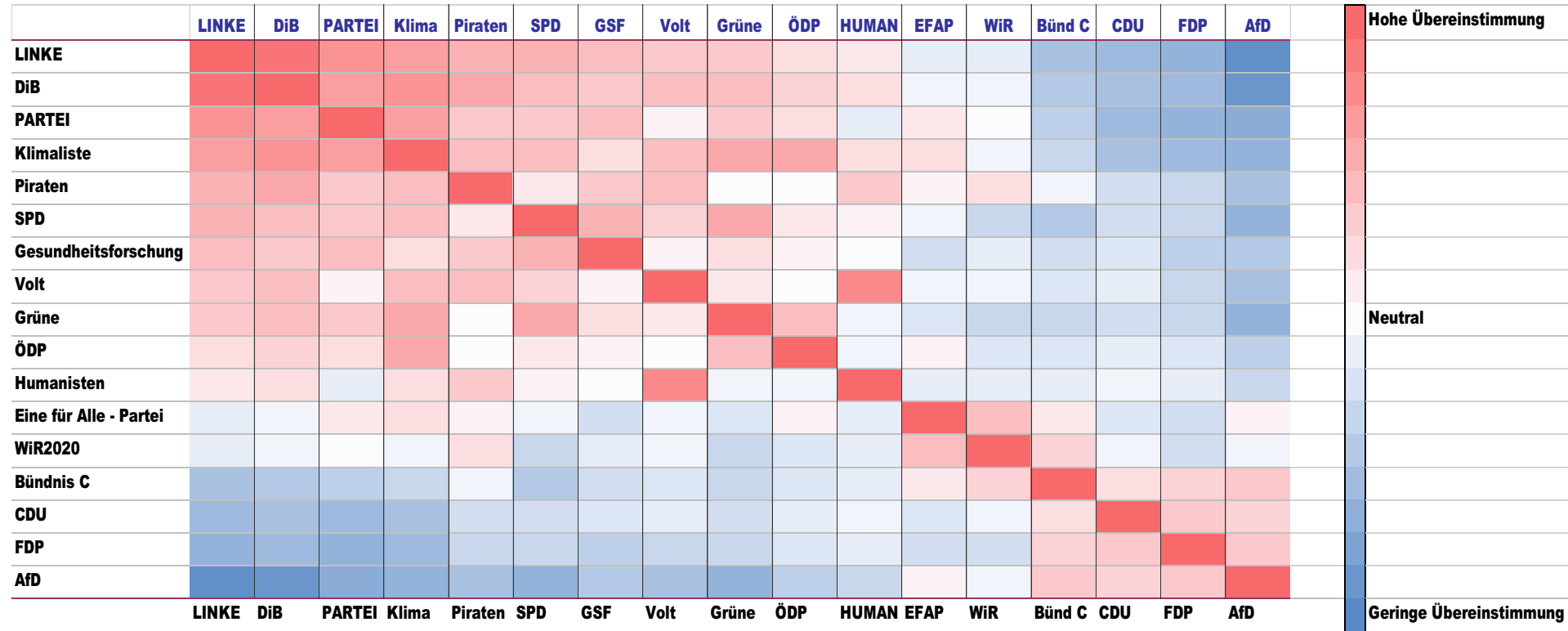


Similarities of the parties Landtagswahl Baden-Württemberg 03/2021 (WahlSwiper)

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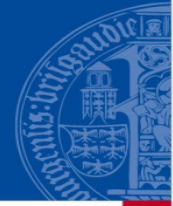


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Wanted Coalitions

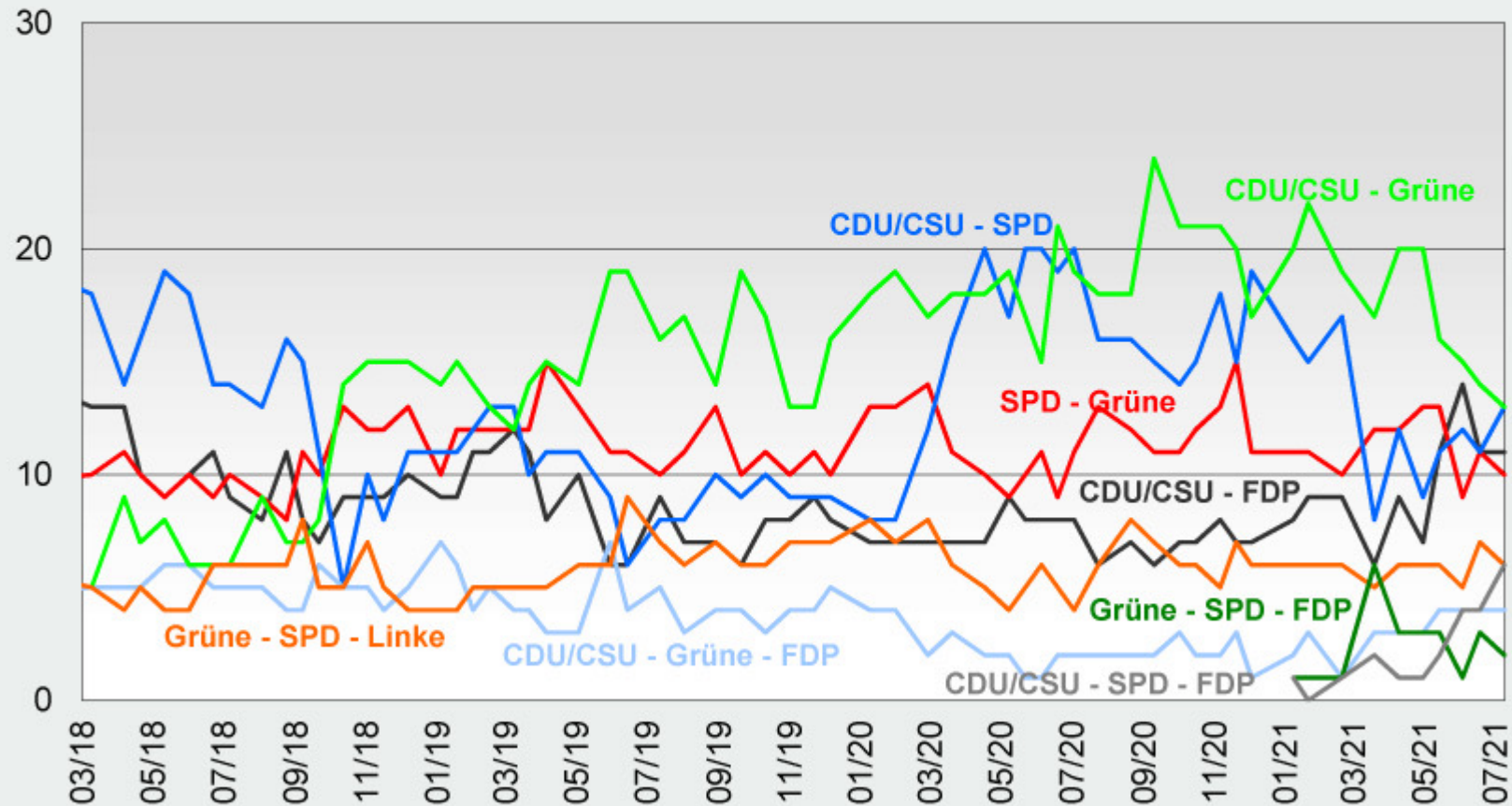
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Gewünschte Koalition seit 03/2018

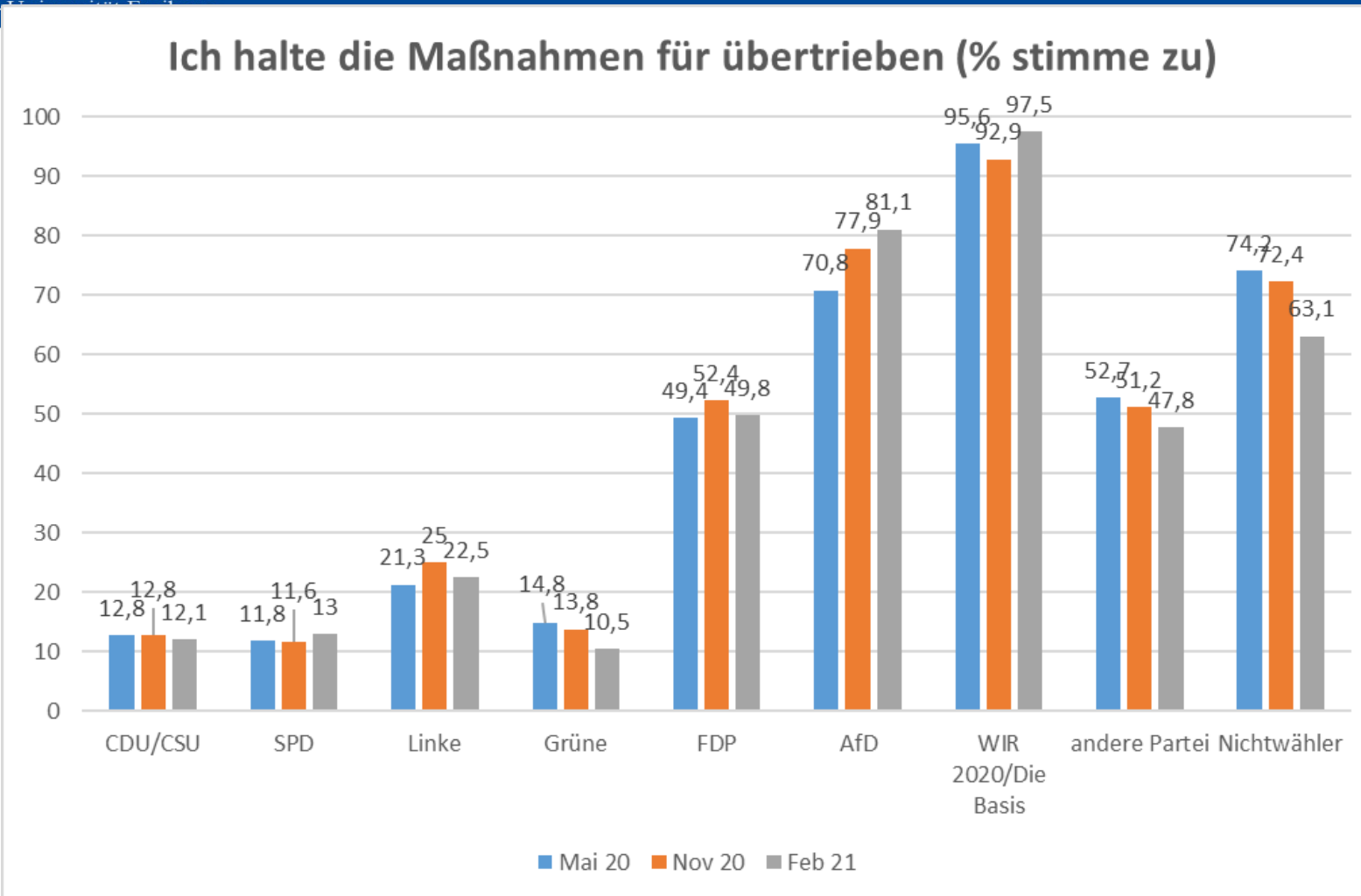


Who thinks the Corona measures are excessive?

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Wave 1 May 2020: N = 7808; Wave 2 Nov 2020: N= 6645; Wave 3 Feb 2021: N= 5554; weighted by age, gender, East-West. The categories "tend to agree" and "fully agree" were combined into "agree" for this analysis. In the third wave, the two protest movements "Die Basis" and WIR 2020" were combined. In the two previous waves "Resistance 2020/WIR2020".

Health Policies in Election Programs

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- Greens: 257 pages!: 150 x „health“
 - Linke: 144 pages – 82 x health
 - CDU: 140 pages – 57 x „health“
 - SPD: 66 pages – 47 x „health“
 - FDP: 91 pages – 37 x „health“
 - AfD: 103 pages – 36 x „health“
-
- Subjects: Insurance system, Corona, lack of employees, wages, vaccination, digitalisation, hospitals, prices of pharmaceuticals,

VoteSwiper 2021: Should private health insurance be redesigned in favour of a general citizens' insurance?

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- So far 23 parties (out of 54) answered!
- 17 Yes, 6 No

Party	33. Should private health insurance be redesigned in favour of a general citizens' insurance?
FREIE WÄHLER	Yes
DIE LINKE	Yes
SPD	Yes
Bündnis 90/ Die Grünen	Yes
Alternative für Deutschland (AfD)	No
FDP	No
CDU/CSU	No

Kontakt Daten

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<http://portal.uni-freiburg.de/politik/seminar/mitarbeiter/wagschal>

What about health care?

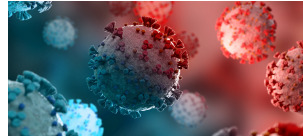


... and what about market access?



... and what about market access?

Given various negative effects on tax income...



... stakeholders expect an entry into force of a savings law!!

Likely changes independent of new coalitions... until end 2022

- No automatic added benefit for orphan drugs anymore within the AMNOG process – as early as April 2021
- No free pricing at launch – likely pay-back of difference between negotiated and launch price starting at launch day



Likely changes independent of new coalitions... until end 2022



- „Fixed-amount grouping" (Festbetragsgruppen) for comparable DiGAs with comparable efficacy
- Merging of DiGA and DiPA systems for "listing", benefit assessment and reimbursement pricing.

... and medical devices?



- Potential changes in the financing of hospital investments -
 > Impact on medical devices open
- No changes expected with respect to reimbursement processes

And the elephant in the room?



Bürgerversicherung („citizen’s insurance system“ – kind of NHS)

VS

GKV & PKV System (Statutory and private health insurance system)



Time for questions ...

German elections ahead

potential outcomes and its implications
on health care market access



Market Access &
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