Health IT Business Conference on Challenges & Potentials for a Future Healthcare System

The German Health IT Market – Current Developments and Trends

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16 June 2015
Agenda

- bvitg and conhIT
- Health IT in Germany
- Telematics Infrastructure
- Current legislation
- Summary & Outlook
German Association of Healthcare IT Vendors

- Represents the leading providers of healthcare IT in Germany
  - Members represent 90 percent of the German health IT market (inpatient and outpatient care)
  - 70 percent of member companies operate internationally

- Established partner for the government and the institutions and organizations of healthcare providers and health insurance companies

- Our Goals are:
  - Establish healthcare IT in all areas of medical care
  - Be in close dialog with all actors of healthcare IT
  - Advance interoperability and international standards
  - Ensure competitiveness of the industry
  - Inform the public about the market
Member Companies (in alphabetical order)

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. KM|KS 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. MediInterface GmbH
32. mediDOK Software und Entwicklungs GmbH
33. MediSoftware Computer systeme 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
51. VISUS Technology Transfer GmbH
52. 3M Health Information Systems
53. 4voice AG
conhIT – connecting health IT

- Europe’s biggest industry event in healthcare IT
- Initiated in 2008 by the bvitg and its members
- conhIT 2015: April 14 – 16 in Berlin, Germany
  - 388 exhibitors from 13 countries
  - 7,464 visitors from 65 countries
  - 97% visitor satisfaction rate
  - > 150 events in Academy, Congress and Networking
Safe the Date!!!

http://www.conhIT.com

conhIT

19–21 April 2016
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The German Health Care System
A Concise Overview

Konrad Obermann, Peter Müller, Hans-Heiko Müller, Burkhard Schmidt, Bernd Glazinski (Eds.)
Some numbers I: Health Insurance

Those with health insurance in Germany
in millions

with statutory health insurance

69.8
17.8
of that non-contributing insured family members

with private health insurance

9.0

14.6% of income
7.3% employer
7.3+x% employee

Source: KMI official statistics of the Federal Ministry of Health, Association of Private Health Insurance Funds; as of June 2012
Basic Principles of Statutory Health Insurance (SHI)

1. Solidarity (transfer from high income population to high health risk/sick population)
2. Benefits in kind (no pay upfront)
3. Financing from employers and employees
4. Self-administration (SHI Funds & Physicians‘ organizations)
5. Plurality: Patients can choose their provider
Some numbers II: Care Providers

1. Hospitals
   - 2100 hospitals
   - Average length of stay: 8 days
   - Total number of beds: 50,000

2. Physicians
   - Total number of registerd practicing doctors: 325,900 (43 % private practice, 49 % in hospitals)

3. Nurses
   - Total number of nurses: 712,000 (70 % inpatient, 14 % outpatient care)
Almost 100 percent of medical practices and hospitals use IT
→ Vast majority stores patient information electronically
→ Completely electronic patient management is still uncommon, yet share is growing
→ Approx. 1.5 - 2 % of hospital budget for IT
→ Market volume: ~ US$ 1.8 billion

Approx. 200 vendors of health IT in Germany
→ Practice Information Systems: ~ 120 vendors; 30 relevant ones; 2 with 55 % market share
→ Hospital Information Systems: 8 vendors
→ Specialized solutions: approx. 80 vendors

Missing interoperability between different vendor solutions and usage of various communication standards
Overview of standards and specifications in Germany

- Rebate contracts
- eEinweisung
- Portale
- D2D
- BDT
- GDT
- SCIPHOX
- KV ADT
- Connecting medical devices
- OrderEntry
- Homecare
- Continua
- eCl@ss
- Fam. Doc.
- ICO
- Rehab
- Physician
- Hospital
- SHI-system
- §301, §302
- Gesundheitsakten
- KVK
- eGK
- eDMP
- Web integration
- Cancer registries
- Tumor documentation
- DALE-UV
- Telemedicine
- Case files
- CDISC
- IHE
- BQS
- HL7 v2
- DICOM
- VHITG-Arztbrief
- Rote Liste
- BQS
- Hospital statistics
- CEN 13606
- ICD-10
- LOINC
- ISO TC215
- VHitG
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Envisioned German Telematics Infrastructure

- **145** statutory health insurances
- **90% (~70 Mio.)** insured persons
- **81 mio. inhabitants**
- **154,000** general practitioners
- **296,000** specialised doctors/dentists/physiotherapists
- **2,100** hospitals
- **21,000** pharmacies

**eHealth Card (eHC)**
eHealth Timeline

- Law of the Modernization of the Statutory Health Insurance System
- First Telemedicine Projects
- eHealth Act (Draft)
- Telematics Infrastructure

Timeline:
- 2004
- 2005
- 2006
- 2007-2013
- 2014
- 2015
- 2016
- 2017
- 2018
eHealth Act

- Pushing the digitalization of the German healthcare system in the following areas:

  1. Facilitating the access of applications to the telematics infrastructure.
  2. Fostering the telematics infrastructure as the central platform for communication in healthcare.
  3. Changes to the governance structure of the gematik.
  4. Improve interoperability among software in the healthcare sector.
  5. Promoting telemedicine in healthcare.
IT Security Act

• Increased IT security (availability, integrity, trust, authenticity).
• Fiercer security procedures for „critical IT infrastructure“.
• Stronger role for the Federal Office for Information Security (BSI, also highly relevant for telematics infrastructure).
• Affects health care system, not yet known how much.
• Telematics infrastructure is exempted from this regulation.
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Summary & Outlook

- Health IT is an innovative, growing market with growth rates about national average (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 interoperability 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!
Feel free to get in touch

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