



Identification of market access barriers

Getting access to an ecosystem that knows the healthcare sectors and has clear market access strategies supported by relevant partners, services, tools and methods, is very valuable for Danish and German companies. The following information on market access barriers in Germany and Scandinavia is based on the report 'Identification of market access barriers – work package 6.1 (WP 6.1)' of the Access & Acceleration project. The report presents the results of qualitative interviews and workshops with partners from different institutions and companies (e. g. medical device manufacturers and software development companies). Aiming to describe reasons for market access barriers in Scandinavia and Germany as well as resulting challenges, the report evaluates various barriers to entry for the Scandinavian and German healthcare market for innovative products. It also considers market trends, target groups, sales channels and possible cooperation with users and buyers.

Workshops and interviews were performed in Denmark and Germany: 29 persons participated in total. The analysis identified three main market access barriers for companies:

Barriers regarding the Medical Device Regulation and national legislation

- Complicated tender process and high demand for evidence-based products in Germany
- Legislation and structure of the Technical Aids Register (German: Hilfsmittelverzeichnis) in Germany

Barriers regarding the different structure of the healthcare system

- In Denmark, the success of German suppliers of larger units depends very much on the tender outcome/price agreements
- Legislation and structure of the Technical Aids Register in Germany
- In Denmark, there is an open innovation environment, however, Denmark struggles with scaling
- The German market is not interested in new innovative ideas because of a weak reimbursement system
- Different healthcare systems mean different financial incentives in terms of treating patients

Market barriers related to language

- In Germany and Denmark, relevant information is only available in the national language (e. g. Technical Aids Register, documents on tender processes)
- Germans prefer to speak in their native language
- Lack of knowledge on tender processes across borders

The next step will involve identifying strategies which facilitate the companies' access to the cross-border market entry, and to develop new strategies and tools for overcoming the listed market access barriers. Therefore, a roadmap for market access strategies will be developed.