European MedTech Forum

Technology-enabled healthcare
Connecting the dots, Untying the knots

2-4 December 2015, Dolce La Hulpe (Belgium)

PROGRAMME

Last update 1 December 2015

The European MedTech Forum is the largest health and medical technology industry conference in Europe. In 2014, the conference brought together more than 500 key leaders active in the EU healthcare scene. MedTech Europe – the European trade association representing the medical device and the in vitro diagnostics industries – will organise the eighth edition of the European MedTech Forum on 2-4 December 2015 at the Dolce La Hulpe, Brussels.

For more information and to register, visit ***medtechforum.eu*.**

WEDNESDAY 2 DECEMBER

9.00 – 21.00 MedTech Europe, EDMA and Eucomed working group meetings *(EDMA and Eucomed members only)*

- Communications Network (MedTech Europe)
- Community Care Sector Group (CCSG) (Eucomed)
- HTA Task Force (EDMA)
- Global Medical Technology Alliance (GMTA)
- Market Research Committee (EDMA)
- Market Access and Economic Policies (MAEP) Network (Eucomed)
- National Associations Network (Eucomed)
- Ophthalmology sector group (Eucomed)
- Regulatory Affairs Committee (RAC) (Eucomed)
- Value of diagnostic information (VODI) platform (by invitation only)

16.00 – 17.30 Eucomed General Assembly *(Eucomed members only)*

17.30 – 18.00 EDMA ACAM *(EDMA members only)*

18.00 – 19.30 EDMA General Assembly *(EDMA members only)*

19.00 – 22.00 Reception and Welcome dinner*

**Dress code: smart casual*

THURSDAY 3 DECEMBER (ALL SESSIONS BELOW ARE TENTATIVE AND SUBJECT TO CHANGE)

Day moderator: Cathy Smith, former BBC presenter and correspondent

9.30 – 10.00 Welcome coffee & Registration

10.00 - 10.30 Views from the MedTech Europe leadership

The MedTech Europe leadership will open the conference by giving their perspective on the convergence between technology and healthcare and other key trends impacting the medtech industry.

Speakers:

- Rob ten Hoedt, Chairman, Eucomed & MedTech Europe
- Jürgen Schulze, President, EDMA

10.30 - 11.30 Technology-enabled healthcare: setting the scene

Technology is rapidly transforming society and it's hard to keep up. Companies such as AirBnB and Tesla are transforming industries and we're also seeing disruptors entering the medtech space. Wearables, Apps, Do-It-Yourself (DIY) Devices, Gaming and many other concepts are all gaining traction in the healthcare arena.

The session will start with a current state of play and how the medtech industry is currently coping with the fast pace of change. Several players that are currently disrupting the industry in various shapes and forms will then the discussion.

Speakers:

- Elena Bonfiglioli, Managing Director Health Industry, Public Sector, EMEA, Microsoft *(confirmed)*
- Erik Cotman, Senior Manager Healthcare, PwC *(confirmed)*
- Paul Dardel, Founder and CEO, Aedmap *(confimed)*
- Arnaud Delhaye, Vice President, Diabetes EMEA, Medtronic *(confirmed)*

11.30 – 12.00 Networking break

12.00 – 13.15 Parallel sessions

Market Access

Let's make diagnostic information shine! Tools to demonstrate and communicate value to payers and patients

To get the value of the information provided by in vitro diagnostic tests recognized and accounted for its added value when funding and reimbursement decisions are made, is a daunting task faced by IVD manufacturers in Europe.

How can we demonstrate to payers that the information the test provides adds value by decelerating cost increase, improving the efficiency of the system and patient experience? Will they be willing to pay for it? Can we add value by understanding and fulfilling patient's information needs?

The parallel session will present practical tools to point out the value of diagnostic information to payers, and also specific tools to understand patient important outcomes related to diagnostic information.

Moderator: Victoria Wurcel, Manager HTA & Economic Policies, EDMA *(confirmed)*

Speakers:

- Maarten J. IJzerman, Professor, Chair Health Technology & Services Research Dean, Health & Biomedical Technology, University of Twente, The Netherlands *(confirmed)*
- Lou Garrison, Professor, Pharmaceutical Outcomes & Policy Program, School of Pharmacy & Departments of Global Health and Health Services, University of Washington, US *(confirmed)*
- Cor Oosterwijk, Director VSOP & Secretary General EGAN *(confirmed)*
- Sean Tunis, Founder, President and Chief Executive Officer - Center for Medical Technology Policy (CMTP) *(confirmed)*

Regulatory & International

The Localisation question: Russia and Beyond

Russia has launched in 2015 a strong policy to favour locally manufactured medical devices. This is part of a wider trend around the world which will be explored in this session.

Moderator: Jesús Rueda Rodríguez, Director International Affairs, MedTech Europe, EDMA, Eucomed *(confirmed)*

Speakers:

- Wolfgang Igler, Trade and Economic Affairs Manager, DG Trade, European Commission *(confirmed)*

- Sergey Kolosov, Executive Director, International Medical Device Manufacturers Association (IMEDA) *(confirmed)*
- Christian Parry, Senior Vice President Public Affairs, Stago - Vice President, EDMA Executive Committee – Board Member, Medtech Europe *(confirmed)*
- Nadav Tomer, Vice President, Johnson & Johnson Diabetes Solutions EMEA *(confirmed*)

Strategy & Business

How to leverage real world evidence to maximize commercial performance & product value

The Parallel Session will focus on best practices regarding the use of real world evidence, such as patient level information, procedure/diagnosis & consumption data to improve a company's commercial practices, including:

- Value pricing based on impact of a product on patient flow and economics of care
- Customer/patient segmentation and targeting
- Customer engagement / relationship strategy
- Tailor messaging to various stakeholders
- Market sizing & forecasting

(sponsored by IMS Health)

Speakers:

- Peter Kratzert, Senior Principal, IMS Health *(confirmed)*
- Paolo Molinari, Principal, Swiss Commercial Effectiveness Services, IMS Health *(confirmed)*
- Dan Simpson, Senior Principal, Global Real World Evidence Solutions, IMS Health *(confirmed)*

13.15 – 14.15 Networking lunch

14.15 – 15.45 MedTech Speak – Connecting the Dots, Untying the Knots

This session will cover three different angles relevant to the medical technology industry, each of them being presented in a lively way and followed by a dedicated Q&A session.

- 14.15 – 14.45 Milkman 2.0 – A new paradigm for medtech commercial

  As a result of their original global medtech commercial benchmarking study in 2012, The Boston Consulting Group will this year elaborate if the industry is "still deploying milkmen in a megastore World". BCG argued that industry had significant work to do in improving the

efficiency of our commercial model while strengthening capabilities across the full spectrum of commercial excellence.
Based on the just completed 2nd edition of the "Milkman Study", Goetz Gerecke will share, hot off the press, to what extent industry has been able to move the needle in fixing the medtech commercial model. Goetz will present a vision on how to ensure profitable growth in an environment increasingly shaped by value-based healthcare, digital disruption and low-cost competition.

Speaker: Goetz Gerecke, Partner & Managing Director, Boston Consulting Group *(confirmed)*

- 14.45 – 15.15 Are your end-users patients or people using medtech?

  What do people that use medical technologies on a daily basis really think about the medtech industry? How is the industry perceived by its end-users?

  Speaker: Thaila Skye, English blogger and YouTube vlogger *(confirmed)*

- 15.15 – 15.45 Paying the medtech bill – Is it value for money?

  How do payers expect to tackle the rising costs in healthcare? And what do they think about the speed of the technological advances in the medtech arena? What's their advice to industry beyond price controls and delivering more value?
  Richard Di Benedetto, President of Aetna International, will answer these and many other questions. Aetna is known to be a disruptor in the healthcare insurance landscape by replacing its fee-for-service reimbursement model with a value-based model.
  Richard has spent a large part of his career at a medtech company and knows the ins and outs of the industry.

  Speaker*:* Richard Di Benedetto, President, Aetna International *(confirmed)*

15.45 - 16.15 Networking break

16.15 – 17.30 Parallel sessions

Market Access

Creating Value Through Cooperation: Toward a European Strategy on MedTech

The session will discuss the creation of a sustainable framework of cooperation between researchers, industry and hospitals to enhance the development of medical technology from conceptualization to market access to uptake, as well as considering the necessary evidence and impact assessment methodologies necessary for accurately demonstrating the value that medical technology brings to patients and healthcare systems.

Speakers:

- Jes Broeng, Professor of Technology Innovation, Technical University of Denmark (DTU) *(confirmed)*
- Fergal Donnelly, Research Programme Officer DG RTD, European Commission *(confirmed)*
- Stanimir Hasardzhiev, Founder & Chairperson, Bulgarian National Patients' Organisation (NPO) *(confirmed)*
- Yves Verboven, Director Market Access and Economic Policies, MedTech Europe *(confirmed)*

Regulatory & International

MDR/IVDR Readiness – Who's on your team?

The session aims at discussing what progress should have been made by the Manufacturers on the journey to compliance. Expectation in December 2015 is that we will be getting closer to the finalisation of the text and with the assumption that publication is imminent, we will explore an MDR/IVDR implementation readiness scorecard. This session is organised for the regulatory representatives and the Team: the business, supply chain, quality, R&D, PMS, etc.
(sponsored by EY)

Speakers:

- Eithne Lee, Associate Partner, Ernst & Young Life Sciences *(confirmed)*
- Patrice Napoda, Strategic Advisor, YourEncore *(confirmed)*

Strategy & Business

Innovating in mHealth and Patient Care: Trends & Opportunities

The health care and life sciences sector is recognized as one of the top three fields (along with consumer products and the financial services industry) likely to experience new mobile business model growth in the next five years, according to a recent Deloitte Open Mobile Survey. After a slow start, the capabilities offered by mobile technologies are fast being appreciated by the health care

industry with a raft of devices, sensors, apps and other programs being developed that target chronic conditions, telemedicine and remote monitoring, patient data capture, electronic records, e-prescribing and the parallel industries of fitness and wellness. The extent to which stakeholders create user confidence through adequate privacy and security protections will play a key role in accelerating or retarding the adoption of mHealth and the realization of benefits.
In this panel Ms Karen Taylor will present “How technology is transforming patient care today and tomorrow” and Mr Park is going to address “Innovating in mHealth: Trends and opportunities of this growing market”.
(sponsored by Deloitte)

Speakers:

- Christopher Park, Consulting Principal, Deloitte (*confirmed*)
- Karen Taylor, Director, Centre for Health Solutions, Deloitte LLP (*confirmed*)

17.30 - 18.30 From Device to Social Technology - Heads of Innovation Debating The Future of Medtech

Get the latest opinions of those responsible for innovation as they join each other to discuss the fast pace of change in society and what this means for the medtech industry.
Be ready to hear views from disruptors, award-winning start-ups, and traditional medtech players on how to embrace digital (health) opportunities.
What are their experiences with integrating social technologies (technologies that facilitate social interaction and are linked to internet or a mobile) in their products and services and what is their outlook of the future?

Speakers:

- Dale Athey, Founder, OJ Bio *(confirmed)*
- Michael Fergusson, CEO and Founder, Ayogo *(confirmed)*
- Lars Kalfhaus, President and General Manager, Emminens Healthcare Services S.L.; General Manager, Head of Management Cluster Iberia, Roche Diabetes Care Spain S.L., Roche *(confirmed)*
- Matic Meglic, Director for Digital Health & Patient Management, Medtronic (*confirmed*)
- Simon Sinclair, Vice President Medical Affair, Johnson & Johnson Medical Devices EMEA

19.00 - 23.00 Reception and Gala Dinner*

Guest speaker: Marc Koska OBE, Inventor of the K1 Auto-Disable Syringe, Founder of the SafePoint Trust

**Dress code: Business attire*

FRIDAY 4 DECEMBER (ALL SESSIONS BELOW ARE TENTATIVE AND SUBJECT TO CHANGE)

Day moderator: Cathy Smith, former BBC presenter and correspondent

8.00 – 8.45 Welcome coffee & registration

08.45 - 09.45 Does scale correlate with corporate performance?

Last year we saw three of the largest M&A deals ever announced in the medtech industry.
While it is not clear that scale across multiple product segments has correlated with corporate performance in the past, the jury is out how such deals and scale advantages will materialize in the future.
Chris Simon from McKinsey will kick off the session by giving his take on industry consolidation and the role of shareholder activism. He will then discuss the topic in more detail with two industry CEOs and the editor of Clinica.

Speakers:

- Katarzyna Mazur-Hofsaess, President EMEA, Zimmer Biomet *(confirmed)*
- Chris Simon, Global Head of Medical Products, McKinsey *(confirmed)*
- Tina Tan – Editor, Clinica *(confirmed)*
- Nadav Tomer, Regional Vice President, Johnson & Johnson Diabetes Care EMEA, *(confirmed)*

09.45 – 10.30 Adapting your business: are you ready for the new EU regulations?

After many years, discussions on the medical device and IVD regulations are potentially coming to an end. The current 'trilogue' discussions between the European Council, Parliament and Commission could see a final new set of Regulations as early as spring / summer 2016.
Recognised from the outset by MedTech Europe and member companies as a "Business issue, not just a regulatory issue" this session will explore the degree of readiness of companies including 'best-in-class' examples of being prepared and the impact on strat-plans and portfolios.
In this session EY will give an overview of the current state of play, after which a panel discussion will commence with various experts on the topic including a representative of the European Notified Bodies.

Speakers:

- Gert Bos, Head of Regulatory and Clinical Affairs, BSI (*confirmed*)
- Lucien De Busscher, Partner – Advisory, EY (*confirmed*)
- Roy Bridges, Vice President, Regulatory Affairs and Public Policy Europe – BD (*confirmed*)
- Hilde Viroux, Director EMEA RA, External Affairs & Regulatory Policy, Alcon (*confirmed*)

10.30 - 11.00 Networking break

11.00 – 12.15 Parallel Sessions

Market Access

"We cannot afford to buy cheap" - Paving the way to value-based procurement for MedTech

Value based procurement of medical technology is already a reality in Europe. Several contracting authorities are using health care quality and longer-term cost impact considerations in their procurement decisions. This enables them to take patient outcomes into consideration as well as other qualitative criteria, along with the total lifecycle cost and longer-term costs of care, so as to ensure the best value for the patient, the medical staff, the entire hospital group and society.

BCG and MedTech Europe, in partnership with non-industry procurement experts, have developed a framework to reflect this new way of thinking, as well as a practical tool to help implement value based procurement of medical technology.

This innovative approach echoes the 2014 EU public procurement directive which puts a strong focus on total economic value by making the Most Economic Advantageous Tender (MEAT) the default criteria, and encourages the use of "best value for money" in tendering practices.

Sign up for this factual and down to earth session to discover the MEAT framework and practical tool, and join us in the journey to ensure that value-based procurement of medical technology becomes the common practice across Europe.

Speakers:

- An Baeyens, DG Internal Market and Services, Unit C3 Public Procurement Legislation II, European Commission (*confirmed*)
- Goetz Gerecke, Partner and Managing Director, Boston Consulting Group (*confirmed*)
- Gunnar Goblirsch, Senior Purchaser, Stockholm County Council, Sweden (*confirmed*)
- Ramon Maspons Bosch, Chief Innovation Officer, Agència de Qualitat i Avaluació Sanitàries de Catalunya, Spain (*confirmed*)
- Joaquim Nunes de Almeida, Director Public Procurement and Single Market for Public Administrations, European Commission (*confirmed*)

Regulatory & International

New IVD Regulation – The road ahead

A presentation of the current state of play in the process of developing the new IVD regulation which will focus on those areas which have been already agreed and those areas which still need further discussion as well as an overview of the challenges and resources that will be needed in implementing the new legislation which will include:

- An analysis of the grey areas – what is known and what is known to be unknown

- Overall impact on manufacturers – how to handle the new regulation
- Specific topics looking into:
  - Use of Notified bodies
  - Vigilance
  - Self-tests
  - Companion Diagnostics
  - New essential requirements
  - Impact on other legislation (machinery, RoHS etc)

Top level regulatory analysis and intelligence will be provided by EDMA from current discussions being had with all of the institutions currently participating at the trilogue.

Speakers:

- Jesús Rueda Rodríguez, Director International Affairs, MedTech Europe, EDMA, Eucomed *(confirmed)*

Strategy & Business

Global consolidation and shareholder activism – does scale matter and how to drive long-term shareholder value by taking an activist lens on the business?

The last year was a banner year for M&A in medical technology. Accelerating the med-tech consolidation trend were three of the largest six deals ever announced: Medtronic & Covidien, at $43 billion; Zimmer & Biomet, $13 billion; and Becton Dickinson & CareFusion, $12 billion. While it is not clear that scale across multiple product segments has correlated with corporate performance in the past, the jury is out how such deals and scale advantages will materialize in the future. With a backdrop of industry growth being more muted than historically, game changing innovation becoming harder to come by, price pressures having intensified across many large segments and rapidly changing customer buying behaviours, will the same be true in the future?

On top of the corporate-driven M&A agenda, we are seeing increased activism among shareholders. The current generation of activist investors has moved beyond traditional targets of smaller, badly performing companies, challenging some of the largest and historically most successful enterprises. The impact of these investors is magnified by actions of large, non-activist shareholders which urging executives and boards to take an activist lens to the business and fix vulnerabilities in performance, health, and governance.

Speakers:

- Ruth De Backer, Expert Principal, Strategy & Corporate Finance, McKinsey *(confirmed)*
- Chris Simon, Global Head of Medical Products, McKinsey *(confirmed)*

12.15 - 13.15 The end of the MedTech industry as we know it

Chris Wasden, one of the key thought leaders on digital technology and innovation, will give his view on how digital health technology applications are transforming the medtech industry.

Chris is a regular speaker at the MedTech Forum and his latest book “Tension, The Energy of Innovation” he explains how to ride the innovation cycle.

This year he will elaborate on how medtech companies can adapt to the turbulent market realities created by SMAC (social, mobile, analytic and cloud) digital technologies.

Speaker:

- Christopher Wasden, Executive Director - Sorenson Center for Discovery and Innovation at the University of Utah *(confirmed)*

13.15 – 13.30 Conclusions by MedTech Europe leadership

13.30 – 14.15 Networking lunch