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BVMED ACADEMY SEMINAR · MEDICAL-DEVICE REIMBURSEMENT IN EUROPE

Reimbursement in Denmark

Market Access through Public Procurement and Cross-Border Tendering

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AGENDA

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- **1. Denmark: the healthcare landscape**
  - Population, funding and taxes
  - Regions and municipalities
  - Responsibilities
- **2. Public procurement in Denmark**
  - Legal framework and thresholds
  - EU Treaty principles
  - Regional and municipal purchasing
- **3. Cross-Border Public Procurement**
  - Publication and tender platforms
  - Routes to market
  - Stakeholders and the tender process
  - Barriers and how to overcome them
  - Tips and tricks

KEY MESSAGE

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WHY PUBLIC PROCUREMENT MATTERS

“For many medical devices, public procurement is the practical route to market access in Denmark.”

Public system

Tax-funded, with universal coverage for every resident

Tendered contracts

Most regional purchases are part of tendered contracts

Open to foreign bidders

Cross-Border Public Procurement (CBPP) lets suppliers from other countries bid

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DENMARK AT A GLANCE

Healthcare spending and the tax burden are both above the EU average

Population

6 million

Inhabitants of Denmark

Healthcare spending, % of GDP

10.1%

Denmark

9.9%

EU average

Tax burden

46.0%

Denmark

42.2%

EU average

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HEALTHCARE IN DENMARK

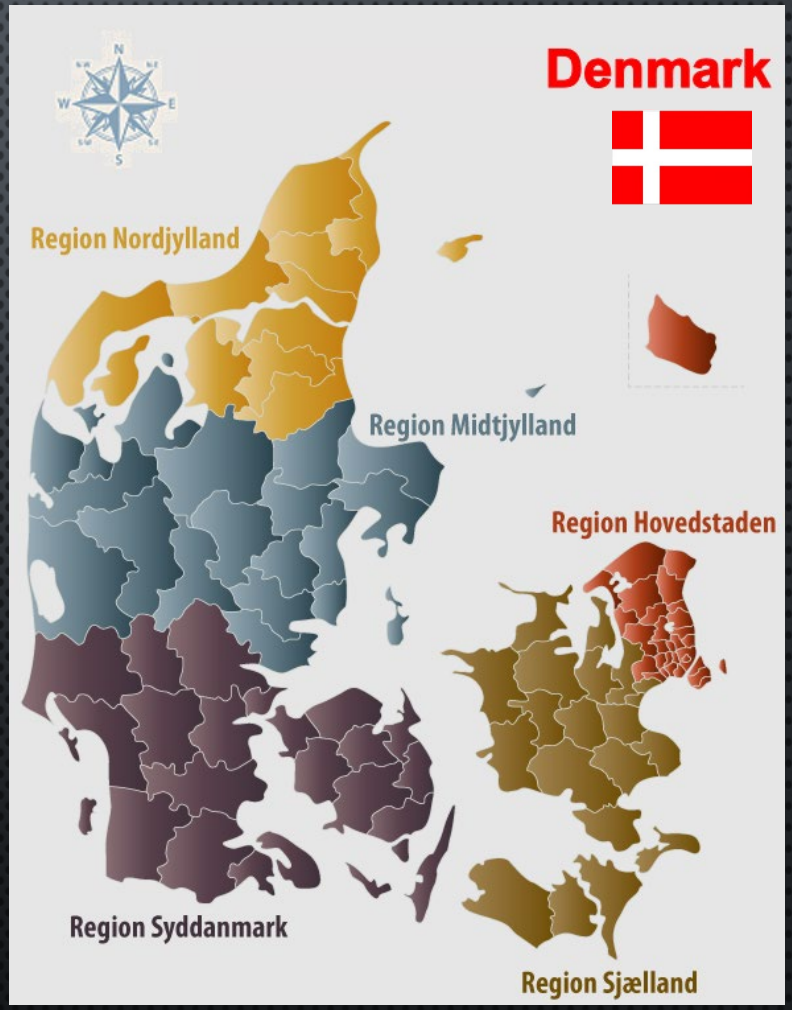
5 regions and 98 municipalities

Tax-funded system
High standards of care, with costs managed through public funding

No out-of-pocket payments

Universal coverage
Every resident is entitled to healthcare services

Public health initiative
Preventive care is prioritised



As part of the healthcare reform, Region Sjælland and Region Hovedstaden will merge into the new Region Østdanmark (Region East Denmark) from 1 January 2027.

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WHO IS RESPONSIBLE

Regions focus on hospitals; municipalities cover a broader range of services

Regions

Healthcare

- Public hospitals
- Prenatal centres
- Community psychiatry and psychiatric hospitals
- Special institutions for disabled people

Municipalities

- Nursing homes and home care
- Dental care for children and disabled people
- Disease prevention and health promotion
- Child preventive care
- Treatment of drug and alcohol abuse
- Social psychiatry
- Rehabilitation

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LEGAL FRAMEWORK

EU rules set the frame; Denmark applies them through national law

1

EU LEVEL

Directive 2014/24/EU

In force since 2016

2

NATIONAL LAW

National Public Tender Law

In Danish: udbudsloven

3

ENFORCEMENT

National complaints board for public procurement

In Danish: Klagenævnet for Udbud

National Public Tender Law is beeing revised to include national renders (below the EU treshold).

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THRESHOLDS

Thresholds apply to the estimated total contract value, excluding VAT.

Regions, municipalities and other non-state bodies

Goods and services

€216,000

Works

€5,404,000

State bodies

Goods and services

€140,000

Works

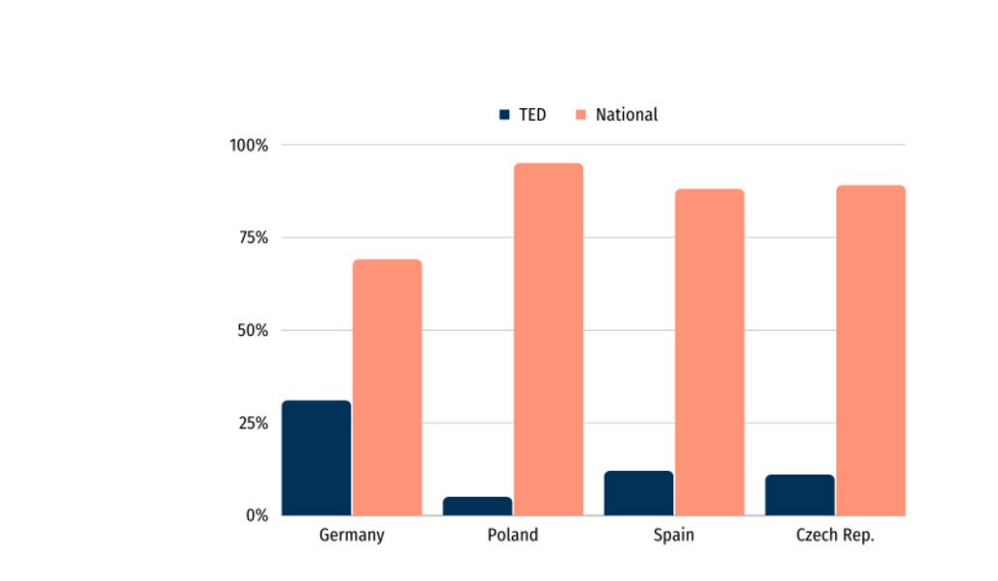
€5,404,000

The EU Commission updates the thresholds every 2 years. Values shown are for 1. januar 2026 til 31. december 2027.

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BELOW THE THRESHOLDS

Purchases below the thresholds are generally not tendered in Denmark



TED versus national tenders in selected countries.

What this means

- Above the thresholds: EU tender rules apply
- Below the thresholds: generally no tender in Denmark
- Publication below the threshold is required only with clear cross-border interest

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EU TREATY PRINCIPLES

Non-discrimination and mutual recognition open the door to CBPP

Equal treatment	Everyone participating receives the same information
Transparency	The process is clearly defined and everyone knows how bids will be evaluated
Proportionality	Requirements are in proportion to the contract
Non-discrimination	No discrimination based on home country (Member State)
Mutual recognition	Certificates, education and similar documents from other countries are recognised

CBPP

Bidding across borders

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PUBLIC PROCUREMENT IN DENMARK

Transparent and well regulated, but slower and less flexible than private buying

The system

Strengths

- High transparency and low corruption
- Good overview of processes

Challenges

- Longer decision-making processes
- Lack of flexibility
- Relatively short tender submission periods, often around 4 weeks

Attitude to non-Danish bidders

Positive signs

- Generally positive towards non-Danish bidders and suppliers
- More tenders are written in English
- Good language skills, primarily English

Challenge

- Limited experience with CBPP

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REGIONAL PURCHASING

Largely centralised, and mostly tendered

Most regional purchases are part of tendered contracts

Centralised
Contracts are made with the region

Hospital level
Smaller sales can be made with hospitals

Systems
Integration with current systems and registration in the purchasing system*

**Example: Amgros is the central procurement organization for the Danish regions, responsible for purchasing the majority of medicines used in public hospitals.*

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MUNICIPAL PURCHASING

Municipalities share knowledge and cooperate closely

Municipal purchasing cooperation

Common standards

Centralised training

Informal networking

Approach

Work towards a tender and help shape the requirements so they benefit you, without actively excluding others.

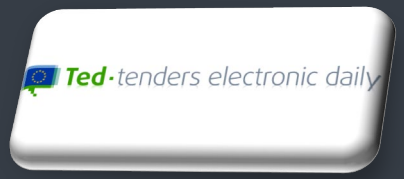
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PUBLICATION OF TENDERS

Tenders are published on TED and on national tender platforms

EU tenders

Danish public entities are required to publish all EU tenders on TED (Tenders Electronic Daily)



Below the EU threshold

Below the EU thresholds, contracts with a clear cross-border interest must be advertised nationally on Udbud.dk.



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TENDER PLATFORMS

Danish contracting authorities use several electronic tendering platforms. The platform is selected by the contracting authority, and suppliers may therefore need to register on multiple systems.

MERCELL

Mercell

Includes Mercell Ethics and Mercell CTM, formerly EU-Supply.

ethics | eu-supply.com |

RIB

RIB

Electronic tendering platform, particularly used for construction, works and technical procurement.

comdia

Comdia

Platform for tenders, market dialogues and supplier registration, widely used by Danish municipalities.

Vejdirektoratet

Udbudsportal

Danish Road Directorate

AMGROS

Amgros

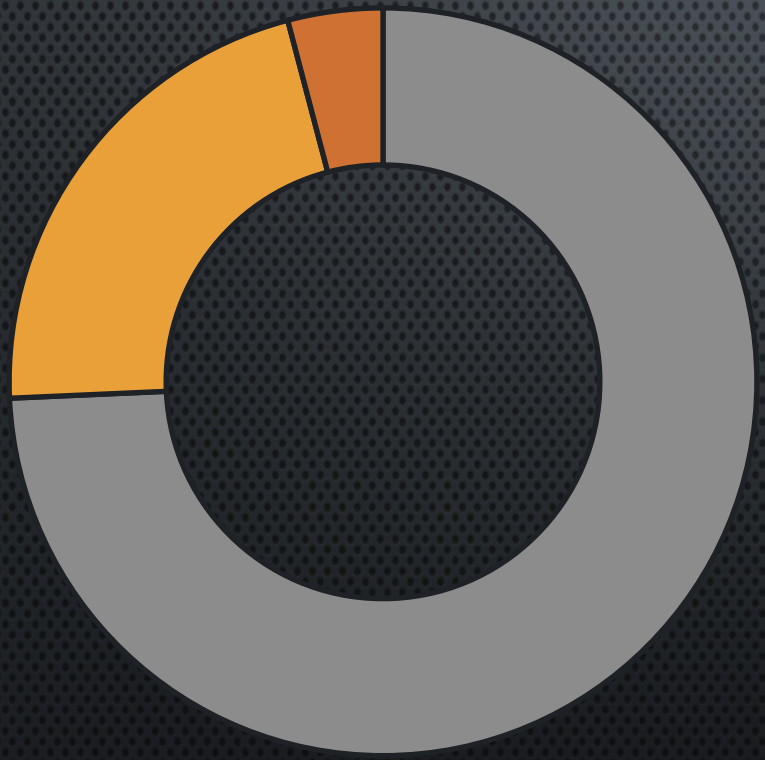
Danish regions, procurement of medicines for public hospitals.

Tip: Many Danish tender platforms offer an English-language interface, supporting cross-border participation

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FACTS AND FIGURES

Share of value by supplier route



74.3% National suppliers (Danish-owned companies)*

21.6% Cross-Border – Indirect (local representation)

4.1% Cross-Border – Direct (bid from home)

* Including Imported products – trading

Historical data. While the figures do not represent the current market, they illustrate that direct cross-border procurement has traditionally represented only a limited share of total procurement.

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THREE ROUTES TO MARKET

Bid from home, work with local partners, or build local representation

1

Cross-Border – Direct

Bid from home

Bid directly in tenders from your home country. Tenders only.

2

Local partners

Dealers and agents

A local partner represents you in the Danish market.

3

Cross-Border – Indirect

Local representation

Your own local presence in Denmark.

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DIRECT ROUTE: BID FROM HOME

Works for tenders only, and needs local support

1

Language and systems issues

You need local support to handle the tender process and the initial interaction with the contracting authority.

2

Local subcontractors

You might need local subcontractors to handle logistics, service and support.

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DIRECT ROUTE: LOW RISK, LOW COST

Easy access, but not the whole market

Benefits

- Low risk that the public customer will not pay
- Low cost of outreach sales
- Demand is well defined and the scope is often known
- Great potential for additional sales
- Well-regulated area (changes, force majeure, etc.)

Risks

- Replacement purchase in case of non-delivery or delay
- Penalties for delays
- You miss out on the two-thirds of the market that is not tendered

"Two-thirds not tendered" carried over from the original presentation. Source to be verified before presentation.

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LOCAL PARTNERS

Dealers and agents can represent you locally

Dealers

Buy from you and resell to the customer

Agents

Represent you and promote your products

Do your homework

Check a partner carefully before you commit

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LOCAL REPRESENTATION

Weigh the cost of a local presence against the benefit

Cost

What a local presence costs you



Benefit

What a local presence brings you



Do your homework

Weigh cost against benefit before you commit

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STAKEHOLDERS

Five roles influence a purchasing decision

Decision makers

Focus on economy and the business case

Often the purchasing department or the head of, for example, homecare or a hospital department

Influencers

Technical aspects: specialised staff such as a wound nurse, IT or legal department, patient associations

Users

Day-to-day use: the people who will work with the technology

Gatekeepers

Value of the product, for whom and how: project leader, HTA consultant

Ambassadors

The bigger picture: people in the organisation who "get it" and promote your technology

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THE TENDER PROCESS IN DENMARK

What to expect from contracting authorities

1

Process-driven teams

Staff are often young and well educated. They follow the rules closely and may have limited CBPP experience.

2

ESPD

Be ready to complete the European Single Procurement Document (ESPD).

3

Language

English is often accepted, but Danish may still be required.

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BARRIERS AGAINST CBPP

Some barriers sit inside your company, others in the market

Internal barriers

- Can you provide products or services that meet all requirements?
- Do you have the necessary economic and financial capacity?
- Do you have the necessary technical and professional capacity?

External barriers: lack of knowledge

- Language skills
- Tendering procedure
- Complex public-sector organisation
- Network: local partners
- Network: public authorities

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OVERCOMING BARRIERS

Close internal gaps and build local knowledge

Internal barriers

- Gap analysis
- Letters of support
- Consortium formation[1]

External barriers

Market research

- Search publicly available data
- Ask for access to documents
- Talk to public authorities and stakeholders

Advisers and local support

- Handle international bidding
- Build relationships and networks with stakeholders

[1] *German terms: Verpflichtungserklärung Unterauftragnehmer / Eignungsleiher; Bietergemeinschaft*

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TIPS AND TRICKS

Five habits that help foreign suppliers win

Monitor tenders

Use a company that specialises in monitoring public tenders

Be patient

Decision-making processes can be long

When in Rome…

…do as the Romans do: follow local procedures and practice

The customer is always right

Listen to the needs of the contracting authority

Ask for help

Use local advisers and partners

Public procurement is the practical route to market access in Denmark

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THANK YOU

Questions and discussion

Public procurement is the practical route to market access in Denmark

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