

Healthcare sector inquiry - Austrian pharmacy market

- The FCA has been analysing the Austrian healthcare market since 2017
- First report regarding the **Austrian pharmacy market** was published in May 2018



Healthcare sector inquiry - Austrian pharmacy market

- Main conclusions and recommendations
 - Liberalisation of provisions regarding public pharmacies
 - Market entry
 - Branch pharmacies
 - Opening hours
 - Services
 - Partial liberalisation with regard to the online retail market
 - Harmonisation of provisions concerning delivery systems
 - Liberalisation of the retail supply and sale of OTC pharmaceutical products

Healthcare sector inquiry – health services in rural areas

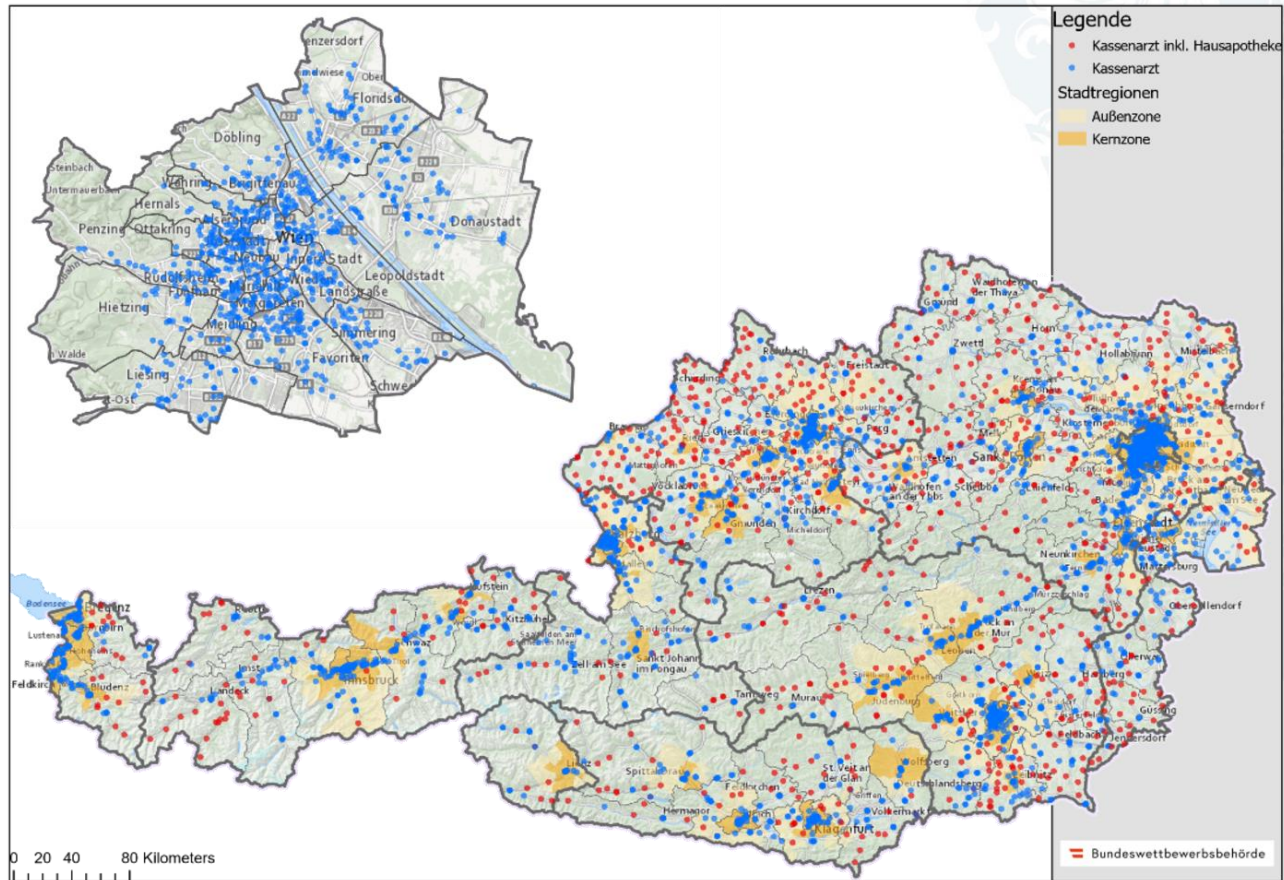
- Second report regarding the **health services in rural areas in Austria** was published in October 2019



 Bundeswettbewerbsbehörde



First-time overview of regional healthcare services



First-time overview of regional healthcare services

- Main conclusions
 - Partial undersupply in municipalities
 - 10 % of the population in rural areas have to drive about 9 km to get medicines
 - Forced closure of dispensing doctors due to public pharmacies
 - Shortage of doctors (in particular with regard to general practitioners)

Shortage of doctors in rural areas and health policy measures

- Main conclusions
 - Half of the general practitioners will retire in the next 10 years
 - Currently non-attractive terms for graduates (in particular in rural areas)
 - Frist (financial) countermeasures by regional policy makers and stakeholders
- Recommendations
 - Improving the status of and support for general practitioners (training, financial incentives etc)

Dispensing doctors

- Main conclusions
 - Dispensing doctors are either not allowed to open or forced to close due to public pharmacies pursuant to the Austrian Pharmacy Act
 - Demand test is linked to kilometres / inhabitants
 - No evidence of either higher quantity or higher prices by dispensing doctors compared to public pharmacies
 - Liberalisation of the demand test does not automatically lead to the closure of public pharmacies
 - See e.g. the Canton of Zurich/Switzerland

Dispensing doctors

- Recommendations
 - Liberalisation of the demand test
 - Abolition of the provision regarding kilometres (in favour of dispensing doctors)
 - Equal provisions for public pharmacies and dispensing doctors
 - Particular considerations regarding the characteristics of rural areas

Primary healthcare centres

- Main conclusions
 - In general, primary healthcare centres could help to increase the accessibility of health services
 - Current legal framework could lead to the opposite result
 - e.g. regarding the reallocation of general practitioners
- Recommendations
 - Additional general practitioners instead of reallocation
 - Liberalisation regarding opening hours
 - Possibility of doctors' dispensaries

Proposals regarding updating the Austrian Pharmacy Act

- Recommendations
 - Modern regulations for public pharmacies
 - Mobile dispensing facilities
 - Branch pharmacies

Healthcare sector inquiry

- Outlook
 - Third report will be published in 2020

