

HEMODIALYSIS IN PORTUGAL

April 2021

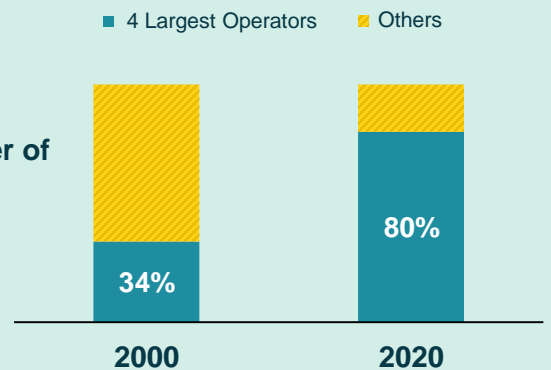
CONCERNS IDENTIFIED



High level of concentration

Several regions are serviced **by a single operator**.

Share in number of centers (%)



Source: PGID, ERS, Operators, APIR and DGS – Data treated by the AdC.



Expansion by acquisition

The opening of **new centers** increases the proximity of the patients to the centers.

24%

Centers directly opened by **the 4 largest operators**

Source: Operators – Data treated by the AdC.

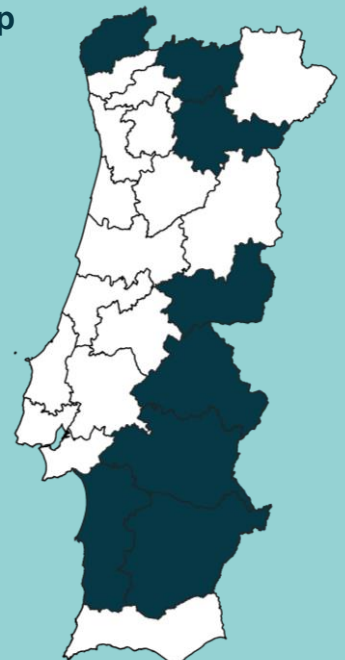


Long round trips

Over **12 000 patients** travel several types per week between their home and hemodialysis centers.

Average round trip time longer than **one hour**

NUTS III



Source: ERS – Data treated by the AdC.



Limited patient choice

There is an **allocation of patients to the centers**, instead of a choice by the patients.

Barriers to the opening and expansion of hemodialysis centers:



Long-lasting
Procedures



Legal
Uncertainty



Multiplication of
procedures



Opening/Expansion
Asymmetries

Post-opening



Patient allocation

Dimensions of competition



Regulated price

Competition in the sector is based on non-price variables. Nonetheless, the level of concentration may have an impact on the price by affecting the bargaining power of the operators.



Location

Location is the main dimension of competition between centers.



Quality

Competition on quality depends on the degree of patient choice.

RECOMMENDATIONS

REMOVE UNNECESSARY BARRIERS TO OPENING NEW CENTERS

- 1 | Publish the standard convention clauses for the hemodialysis sector, due since 2013
- 2 | In the standard convention clauses:
 - (a) assess the possibility of granting a convention by tacit approval; and
 - (b) introduce a deadline to respond to convention requests.
- 3 | Remove unnecessary obstacles that prevent entry of operators and/or the opening of centers because of the existing capacity, the concentration in the market, or the profitability/use of existing resources
- 4 | Create a unique portal/form that links both the licensing and the convention procedures required in the NHS
- 5 | Ensure that the quality requirements in the best practice guidelines for hemodialysis are technologically neutral

PROMOTE PATIENT CHOICE

- 6 | In the non-emergency patient transport regulations:
 - a) Introduce a duty for the Regional Health Administrations (ARS) to inform the patients when several centers meet the NHS transportation management criteria; e
 - b) Develop a cost-benefit analysis on the possibility of introducing a reimbursement option for patients who ensure their own transport, limited to a certain reference value
- 7 | Create a system to compare centers on quality and outcome indicators of hemodialysis treatments