



GERMANY

Capital: BERLIN Population: 81 million

Potential business figures on Healthcare in 5 years: Germany is the largest healthcare market in Europe spending more than 340 million euros on health annually, which makes about 12 % of the total gross domestic product. With 3.8 % of annual growth, German health sector has grown in the past 11 years even stronger than the German gross domestic product and the trend remains the same. In 2017 the turnover of the German health care industry was 75.3 million euros and it is forecasted to be 83.3 million by 2022.

Typical buyer of health services: Healthcare services are provided by public, private and charity-based organisations. Public sector provides 29 % of the hospital services, charity-based organisations 34 %. The most, 36 %, of the German hospitals are in private ownership. Different from some other countries like Finland, primary and secondary care services are provided by self-employed practitioners. There are also approx. 110 statutory health insurance companies and 48 private health insurance companies.

Governmental or legislative climate to support new services/innovations on health: Germany hasn't been able to keep up the speed in the digital era and is lagging behind in terms of digitalization. The government is putting on efforts to raise the grade of digitalization in the country and speak up for even more investments in new technologies and digitalization of hospitals and care sector in order to guarantee good quality care for the patients. German legislation is causing barriers for new developments, e.g. terms of using health data. Also the challenges caused by the federal system need to be taken into account when entering the market.

Typical buying and/or acceptance process in the country for new solutions: New solutions are often tested and evaluated in pilot projects by local actors before taken into use. The Government plans to extend the so-called 'Innovation Fund' to strengthen the implementation of new healthcare service concepts. The annual investment volume is now fixed to 200 mill. €. Medical devices are often bought from German distributors.

Finnish health players already with established business in country Serres, Physiotools, HUR, Profile Vehicles, Buddy Healthcare.

Opportunities for Finland: Patient flow & data management, cost and time effective solutions, tracking (both devices and persons), telemedicine solutions, communication tools, mobile health solutions improving outpatient care, solutions helping citizens to manage their lives independently at home.

Regulation & Reimbursement environment: It is compulsory to have a health insurance in Germany that covers the main cost of the used health care services. The monthly health insurance fee is subtracted directly from the monthly salary and paid by both the employee and the employer.

Trends & Strategy: A need of new innovative solutions to improve daily routines. Problem of lack of employees due to saving measures done by the public sector and tough competition through private operators generate need for innovative solutions to invest in, which is an opportunity for Finnish companies.

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BUSINESS FINLAND

Health & Wellbeing

QUICK FACTS ✓

Life expectancy: 80,8 yrs

GDP (PPP): 4.171 B\$ (6th), Per Capita 50.400\$ (27th)

Official languages: German (English >50%)

Physicians density: 4,2 / 1000 pop.

Digitalization Maturity ✓: 17th /

DEI Index: 3,36 / Stall Out

Health expenditure: 11,3% (GDP)

Urbanization rate: 77,3%

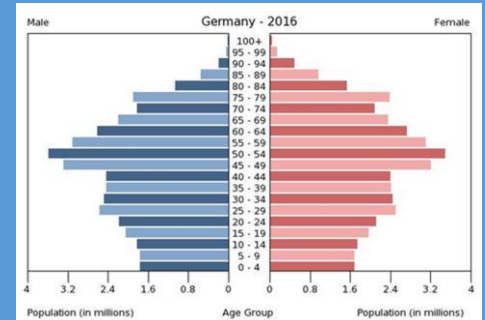
Hospital bed density: 8,3 /1000

Obesity rate: 22,3%

Median Age: 47,1 years

Health Expenditure: 11,3% GDP

Population Growth Rate: -0,16%



Deaths per 100.000 people	Finland	Germany
Respiratory infections	8,5	27,0
Diabetes	10,0	28,2
lung cancer(s)	37,5	51,2
Alcohol use disorders	3,0	5,7
Alzheimer and other dementia	92,5	17,1
COPD	19,7	29,3
Genitourinary diseases	7,2	19,0

National challenges ✓: , Ischemic heart disease, Alzheimer disease, Cerebrovascular disease, Lung cancer

Link to opportunities ✓:

<https://bit.ly/2yNvfWm>

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