POLAND

Capital: WARSAW

Population: 38,5 million

BUSINESS FINLAND

Health & Wellbeing

Potential business figures on Healthcare in 5 years:
Polish Healthcare system is under a transition phase due to its legislative changes and EU support. In 2018, there are additional EUR 520 mln. By 2024, health spending is estimated to increase by an additional EUR 4 bn. The government of Poland decided to increase healthcare spending from current 4,7% of GDP up to 6% of GDP 2024. The public sector is prioritizing to raise overall standard of the healthcare infrastructure and to eliminate operational inefficiencies in care provisions. It is estimated that EUR 3bn will be invested in healthcare sector within 2014-2020 financial framework.

Typical buyer of health services: CEOs, Technical Directors of the hospitals, specialized clinics and senior houses operators. Private sectors is predominant in providing primary healthcare, outpatient care, rehabilitation, long-term care and spa care. Bupa, a UK private health insurer and owner of Lux Med, has prime position in the local health insurance market.

The Polish healthcare sector is dominated by public financing schemes, which accounted on average for 70% of total spending. System of Fundamental Hospital Care Coverage, commonly known as “Hospital Network” divides hospitals into six levels. These levels are financed by general budgets assigned to them by the National Health Fund.

Governmental or legislative climate to support new services/innovations:
Healthcare sector is a top priority for the Polish government. Poland has developed innovation-friendly policies and incentives, increasing the country's attractiveness as a location for research and development (R&D) and clinical trials – especially for pharmaceutical market. Ongoing healthcare reforms and pharmaceutical legislative changes will boost patient access to medicines. The country is heavily dependent on imports.
The government is keen to facilitate growth in innovative R&D. In addition, country's biotech clusters and technology parks are created. As the budget increases, extra funds are expected to improve the accessibility of treatments to ensure quality of health care services.
2017 the bill on a “network of the hospitals” with guaranteed public funding came into force. A new legislation on improving oncology reform package came into effect as well. This oncology reform package abolished the fund limits for diagnosis and treatment. Oncology is going to be financed without limits. Also, new e-prescription and e-medical were introduced.

Typical buying and/or acceptance process in the country for new solutions:

The purchasing processes of public and private hospitals are different. Public entities make orders based on public procurement law and purchasing processes are decentralized. Every hospital is obliged to apply public procurement law. However, each hospital makes orders individually and there is no one decision center. In a large hospital, the process of buying new solutions can depend on many decision makers. Private sector can freely choose and negotiate with suppliers. Foreign companies are well represented by Polish partners, who can support them building business relations and e.g. in tender competitions.

Finnish health players already with established business in country Genano, HUR, Halton, Isku, Orion Pharma, Merivaara, Vitabalans Oy, Plandent Oy.

Opportunities for Finland: Modernization or construction of facilities, Hospital equipments, patient monitoring, infection preventative products and safety products, products that reduce hospital time, infections prevention & innovative solutions for e-health.

Regulation & Reimbursement environment: 97.9% of the population is covered by tax collected public health insurance contributions. The National Health Fund (NFZ) is the sole distributor of social security healthcare funds, purchasing services from hospitals and doctors. The state pays the health insurance premiums of small farmers.

Trends & Strategy: In Poland people aged 65+ will increase by 3 million in the coming 20 years, up to 8.5 million people.

QUICK FACTS ✓

Life expectancy: 77,8 yrs

GDP (PPP): 1,121 T$ (24th), Per Capita 29.500$ (69th)

Official languages: Polish (English 37%)

Physicians density: 2,3 / 1000 pop.

Digitalization Maturity ✓: 35th /

DEI Index: 2,53 / Break Out

Health expenditure: 6,4% (GDP)

Urbanization rate: 60,1%

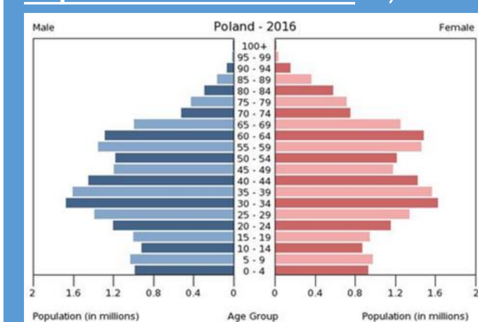
Hospital bed density: 6,5 /1000

Obesity rate: 23,1%

Median Age: 40,7 years

Health Expenditure: 6,4% GDP

Population Growth Rate: -0,13%



Dealth per 100.000 people	Finland	Poland
Respiratory infections	8,5	26,3
Bronchus & lung cancers	37,5	63,3
Colon and rectum cancers	21,1	32,7
Diabetes mellitus	10,0	18,5
Alcohol use disorders	3,0	5,7
Genitourinary diseases	7,2	13,4

National challenges ✓: Cancer(s), Diabetes, hypertension, Modernization of hospitals & IT, eHealth, senior care technology

Link to opportunities ✓ :
https://bit.ly/2Ocy2C9

TF Contact: Ms. Agnieszka Wrobel
agnieszka.wrobel@businessfinland.fi Tel. **+48 508 982 805**