

An Analysis of the German Healthcare Market



Executive Summary

This report aims to provide an overview of the healthcare eco-system and revenue structures within the German healthcare market. The German market, chosen in consultation with the ARCH Industry Steering Committee as an exemplar geographic market, is the third geographic market which has been explored by ARCH, following the UK and US markets. This report looks at the overall healthcare financing structure in the Irish State – i.e., who pays for healthcare services; the latest trends in terms of healthcare reform and innovation in the state; the current context of Connected Health within the state, and the key drivers, opportunities and threats in the German healthcare market for Connected Health companies.

Commercial Opportunities for Industry

Germany is a large and attractive market within the EU with high standards and high spends on healthcare (as a % of GDP). However, research has made it apparent that there are difficulties in sustaining the efficiency of the current healthcare system going forward. Germany has a good ICT infrastructure in place e.g., smart-cards, and as a country, they are moving towards integrated care. With dedicated governmental e-health and regional funds available, there are ample opportunities to develop, test and implement solutions for Connected Health, particularly if related to chronic and elderly care. Once quality and efficiency for Connected Health is proven, a Germany-wide roll-out is quite possible via its dedicated public statutory health insurance scheme.

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**ARCH Industry Members have full access to this report*



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Companies with a commercial interest in these connected health opportunities or who are intertested in collaborating with ARCH should contact Alica May, Project Co-ordinator on info@arch.ie or call 01 7165400.