

„The German hospital market“

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RA Marc Schreiner, LL.M.
Director EU-policies, international affairs, health economics
German Hospital Federation (DKG – Deutsche Krankenhausgesellschaft e.V.)



German Hospital Federation

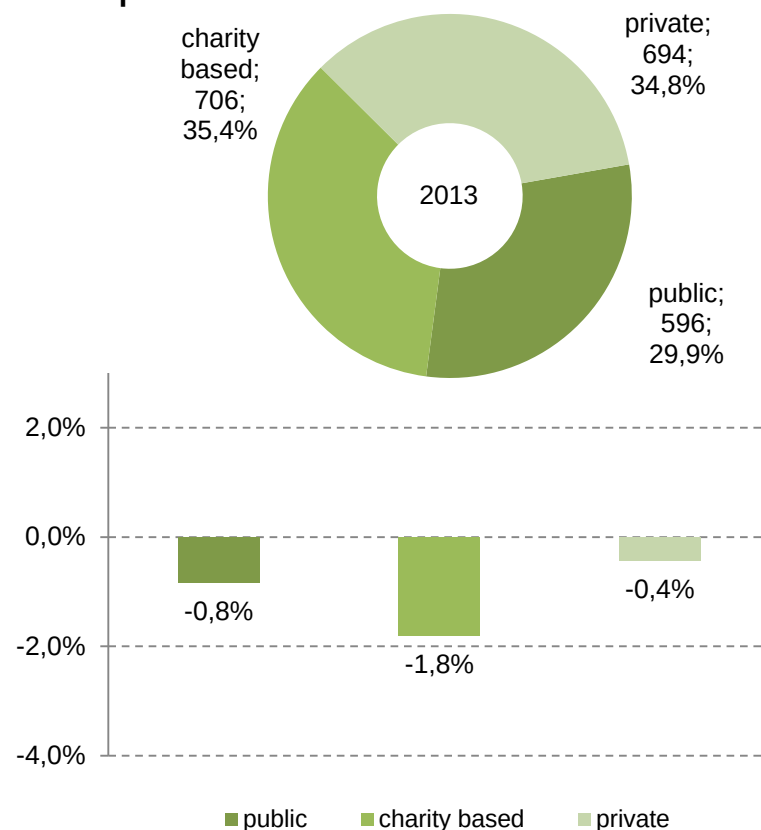
- Representative organ of all German hospitals, no mandatory membership
- 28 member organisations (16 hospital federations on state level, 12 association on the federal level on each special type of ownership, e.g. catholic and evangelic churches, universities, municipalities and counties, private for profit companies, pension funds, etc.)
- Partner of politicians on national, European and international level
- Key player in the self-government-system of the German health care sector (e.g. in the Federal Joint Committee)
- Development of the German DRG-System

Hospitals owners I

shares of hospitals (in %)

	public	charity based in %	private
Germany 2012	29,8	35,6	34,6
Germany 2013	29,9	35,4	34,8
Baden-Württemberg (BW)	36,4	23,5	40,1
Bayern (BY)	45,6	13,7	40,7
Berlin (BE)	2,5	43,2	54,3
Brandenburg (BB)	38,2	27,3	34,5
Bremen (HB)	35,7	50,0	14,3
Hamburg (HH)	7,7	23,1	69,2
Hessen (HE)	31,4	25,0	43,6
Mecklenburg-Vorpommern (MV)	17,9	30,8	51,3
Niedersachsen (NI)	25,9	38,6	35,5
Nordrhein-Westfalen (NRW)	21,9	66,8	11,4
Rheinland-Pfalz (RP)	18,7	61,5	19,8
Saarland (SL)	42,9	57,1	-
Sachsen (SN)	43,0	22,8	34,2
Sachsen-Anhalt (ST)	29,2	35,4	35,4
Schleswig-Holstein (SH)	16,8	32,6	50,5
Thüringen (TH)	34,1	25,0	40,9

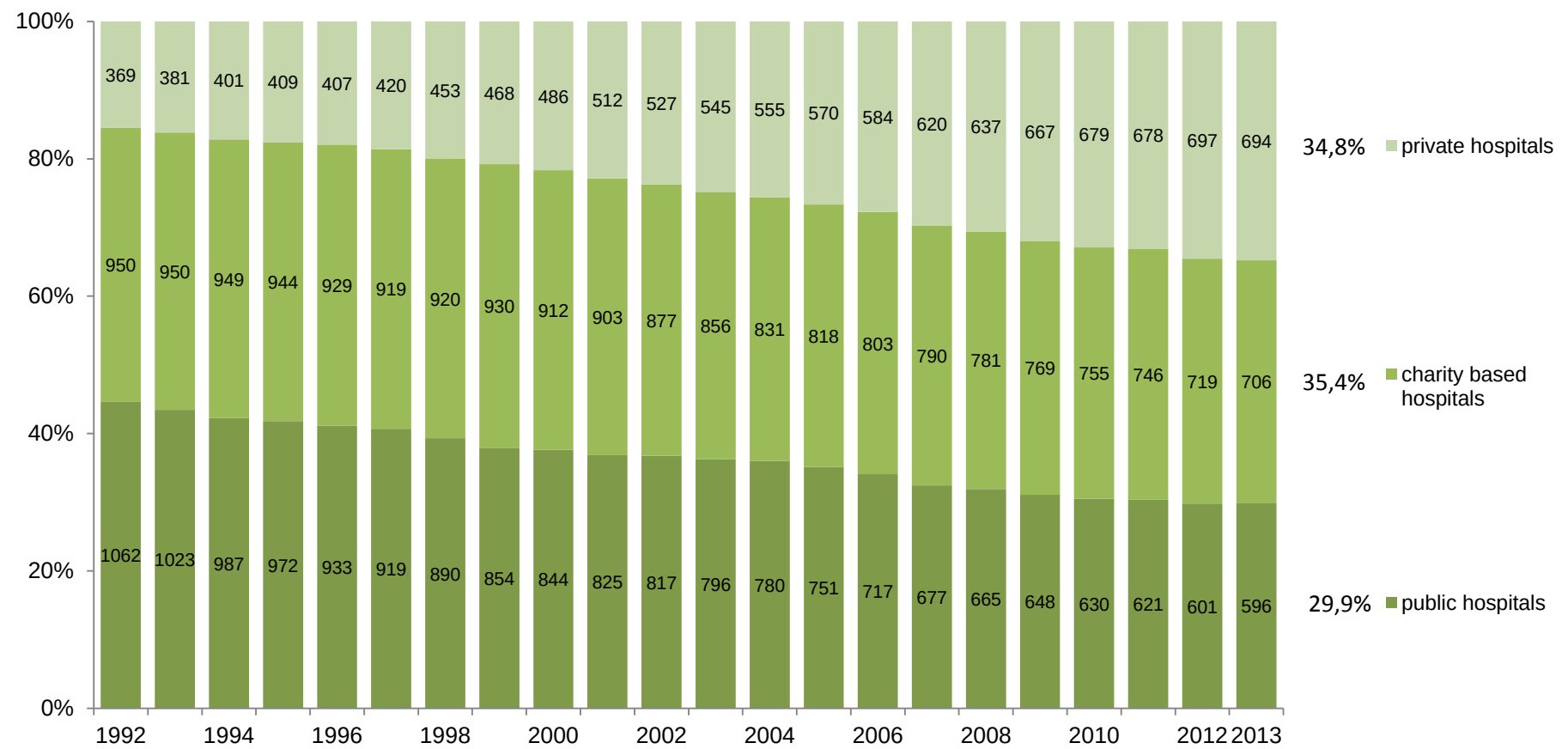
shares of hospital owners 2013 compared to 2012





Hospitals owners II

development – share of hospital owners (share in %, share N)

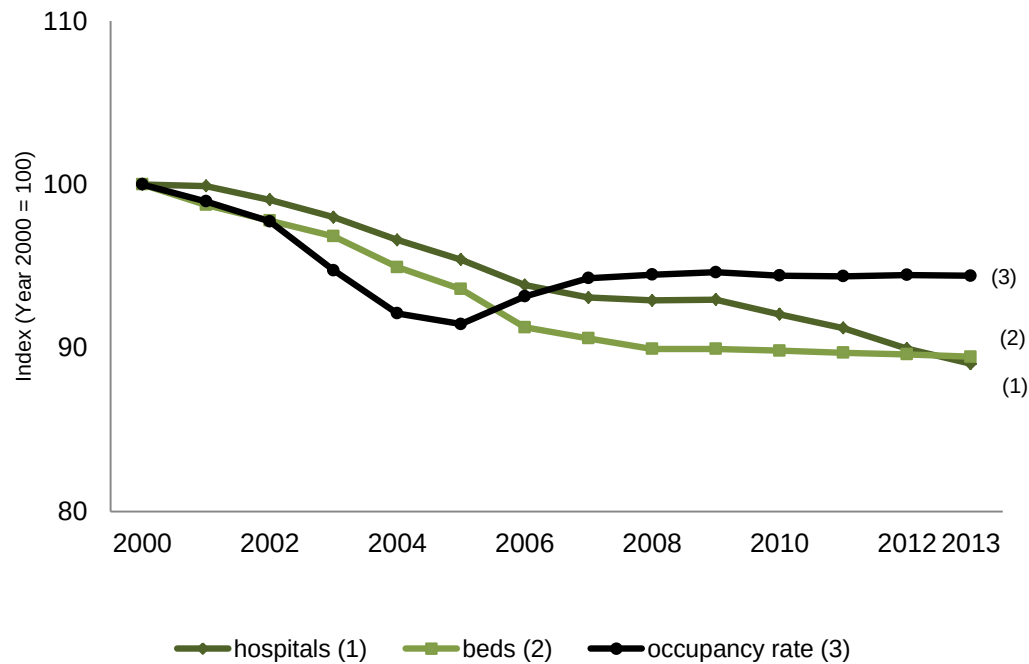


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Source: Federal Statistics Agency

Key data I

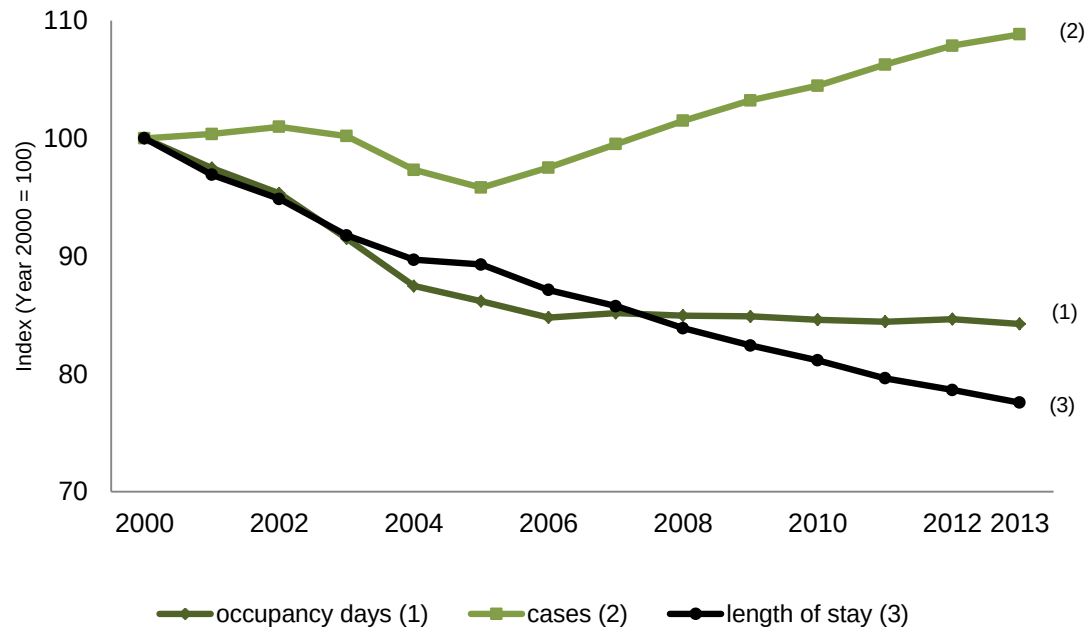
hospitals, beds, degree of utilisation



	hospitals	beds	occupancy rate
	number	in 1.000	in %
2000	2.242	559,7	81,9
2001	2.240	552,7	81,1
2002	2.221	547,3	80,1
2003	2.197	541,9	77,6
2004	2.166	531,3	75,5
2005	2.139	523,8	74,9
2006	2.104	510,8	76,3
2007	2.087	507,0	77,2
2008	2.083	503,4	77,4
2009	2.084	503,3	77,5
2010	2.064	502,7	77,4
2011	2.045	502,0	77,3
2012	2.017	501,5	77,4
2013	1.996	500,7	77,3

Key data II

occupancy days, number of inpatient care, length of stay

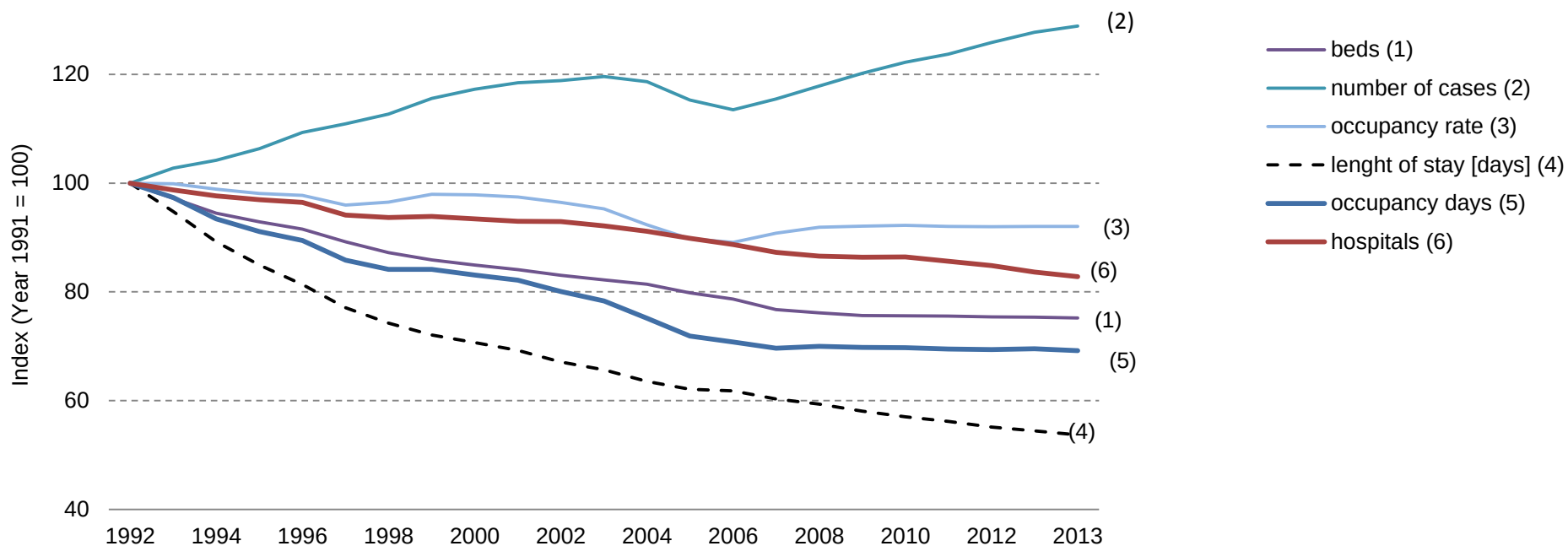


	occupancy days	number of inpatient cases	length of stay
	in Mio.	in Mio.	in days
2000	167,8	17,3	9,7
2001	163,5	17,3	9,4
2002	159,9	17,4	9,2
2003	153,5	17,3	8,9
2004	146,7	16,8	8,7
2005	144,6	16,5	8,7
2006	142,3	16,8	8,5
2007	142,9	17,2	8,3
2008	142,5	17,5	8,1
2009	142,4	17,8	8,0
2010	141,9	18,0	7,9
2011	141,7	18,3	7,7
2012	142,0	18,6	7,6
2013	141,3	18,8	7,5



Key data III

summary: development course key data of German hospitals

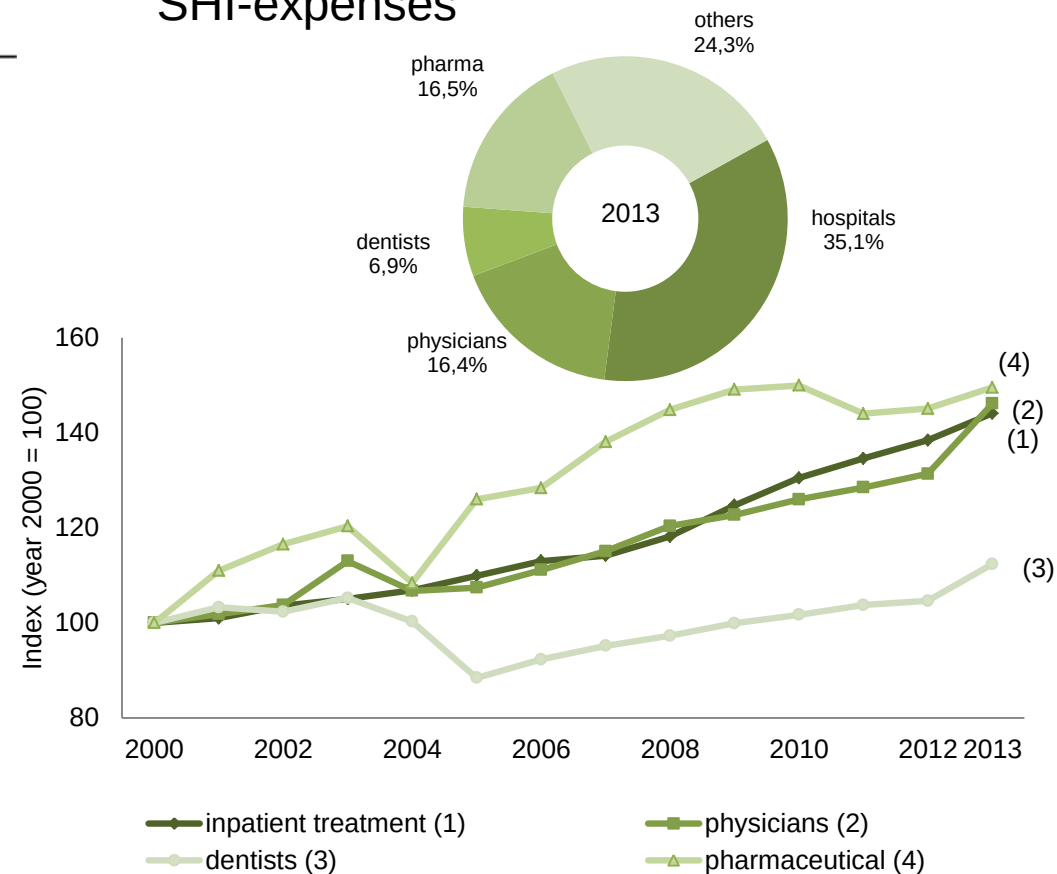


SHI-Expenses

SHI – statutory health insurance

	hospitals	physicians	dentists	pharma
	bil. €	bil. €	bil. €	bil. €
2000	44,5	21,5	11,2	20,1
2001	45,0	21,9	11,6	22,3
2002	46,2	22,2	11,5	23,4
2003	46,8	24,3	11,8	24,2
2004	47,6	23,0	11,2	21,8
2005	49,0	23,1	9,9	25,4
2006	50,3	23,9	10,4	25,8
2007	50,8	24,8	10,7	27,8
2008	52,6	25,9	10,9	29,1
2009	55,6	26,4	11,2	30,0
2010	58,1	27,1	11,4	30,2
2011	60,0	27,6	11,7	30,0
2012	61,7	28,3	11,8	29,2
2013	64,2	31,4	12,6	12,1

allocation (2013) and development of SHI-expenses



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Source: BMG

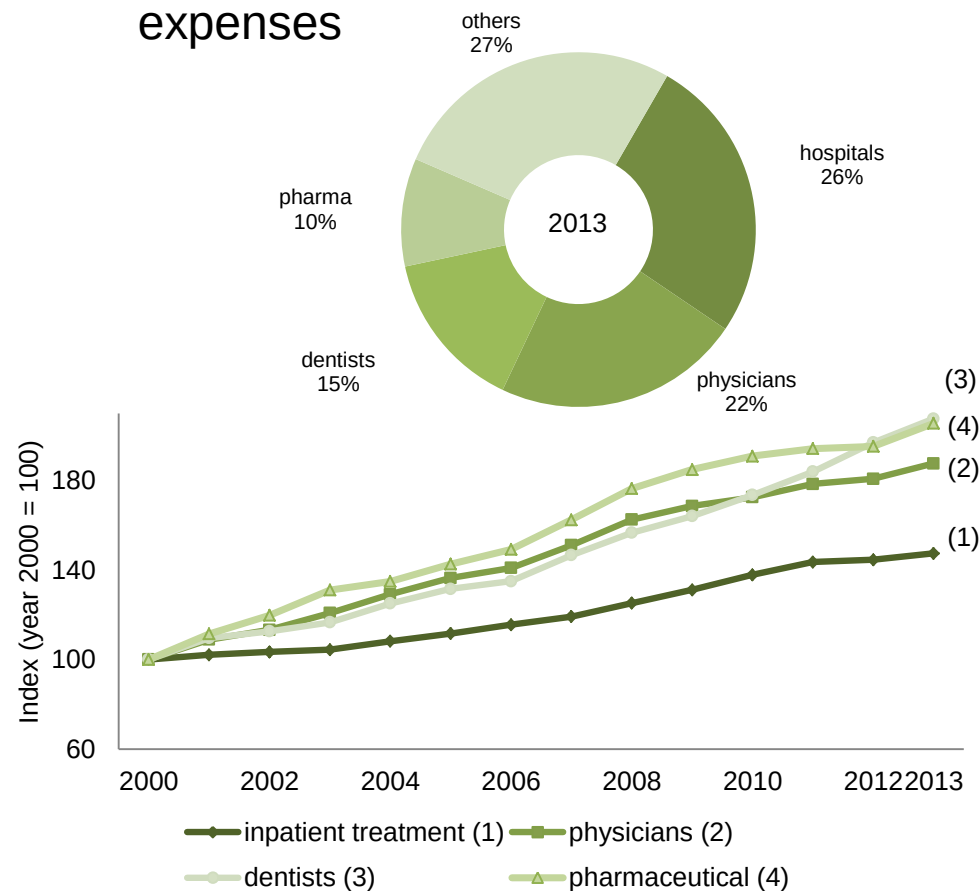


PHI-Expenses

PHI – private health insurance

	hospitals	physicians	dentists	pharma
	bil. EUR	bil. EUR	bil. EUR	bil. EUR
2000	4,7	3,2	1,9	1,3
2001	4,8	3,4	2,0	1,4
2002	4,8	3,6	2,1	1,5
2003	4,9	3,8	2,2	1,7
2004	5,0	4,1	2,3	1,7
2005	5,2	4,3	2,4	1,8
2006	5,4	4,5	2,5	1,9
2007	5,6	4,8	2,7	2,0
2008	5,8	5,1	2,9	2,2
2009	6,1	5,3	3,0	2,3
2010	6,4	5,5	3,2	2,4
2011	6,7	5,6	3,4	2,4
2012	6,7	5,7	3,6	2,5
2013	6,9	5,9	3,8	2,6

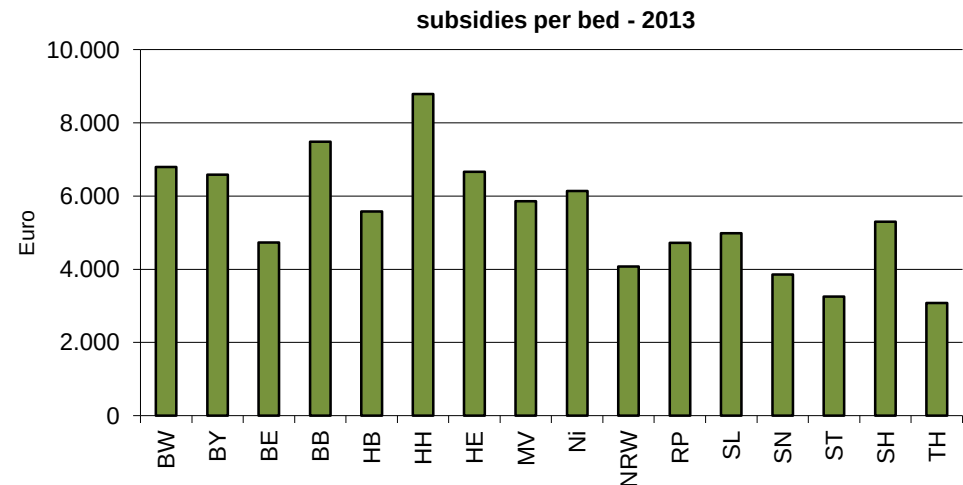
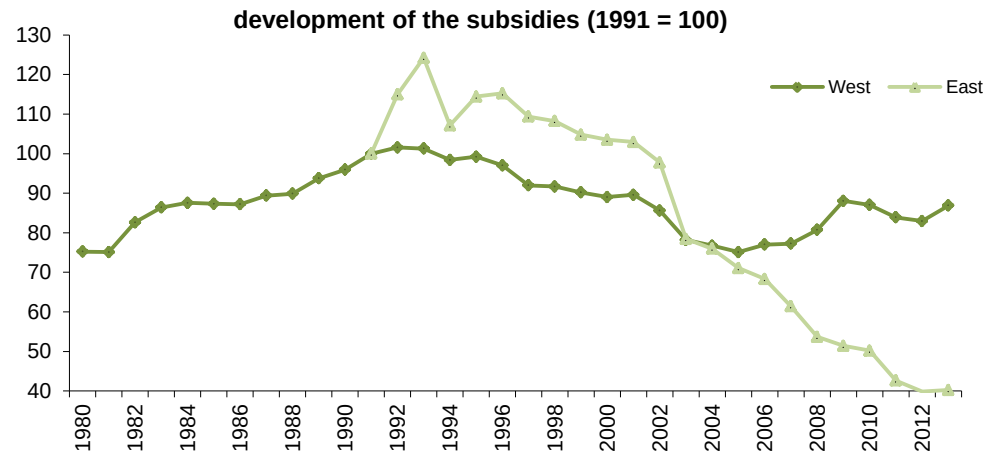
allocation and development of PHI - expenses



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Subsidies granted by states 2012/2013

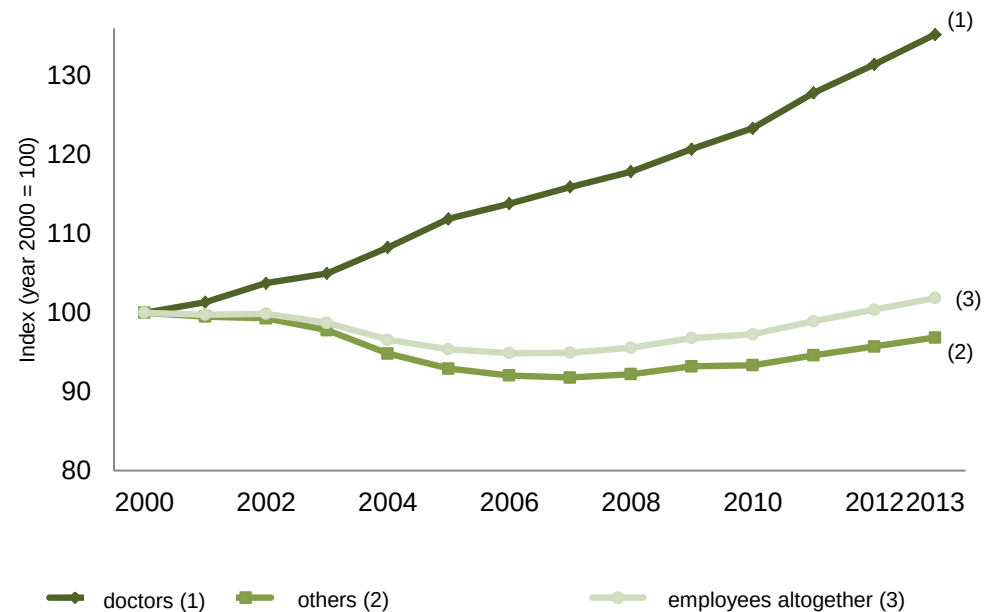
State	subsidies	
	Mio. Euro	%
Baden-Württemberg (BW)	385,0	14,13
Bayern (BY)	500,0	18,35
Berlin (BE)	95,3	3,50
Brandenburg (BB)	114,3	4,20
Bremen (HB)	28,7	1,05
Hamburg (HH)	106,6	3,91
Hessen (HE)	241,5	8,86
Mecklenburg-Vorpommern (MV)	60,8	2,23
Niedersachsen (Ni)	258,5	9,49
Nordrhein-Westfalen (NRW)	493,0	18,10
Rheinland-Pfalz (RP)	119,8	4,40
Saarland (SL)	32,2	1,18
Sachsen (SN)	101,0	3,71
Sachsen-Anhalt (ST)	53,0	1,95
Schleswig-Holstein (SH)	84,7	3,11
Thüringen (TH)	50,0	1,84
Summe	2.724,3	100,0



Hospital staff

	employees altogether* (in fte)	thereof physicians (in fte)	thereof non-medical personal (in fte)
2000	834.585	108.696	332.269
2001	832.530	110.152	331.472
2002	833.541	112.763	327.384
2003	823.939	114.105	320.158
2004	805.988	117.681	309.510
2005	796.097	121.610	302.346
2006	791.914	123.715	299.328
2007	792.299	126.000	298.325
2008	797.554	128.117	300.417
2009	807.875	131.227	303.656
2010	811.729	134.079	304.708
2011	825.654	138.955	310.817
2012	837.754	142.874	313.478
2013	850.099	146.988	316.275

development the hospital staffing in full-time equivalents (fte)



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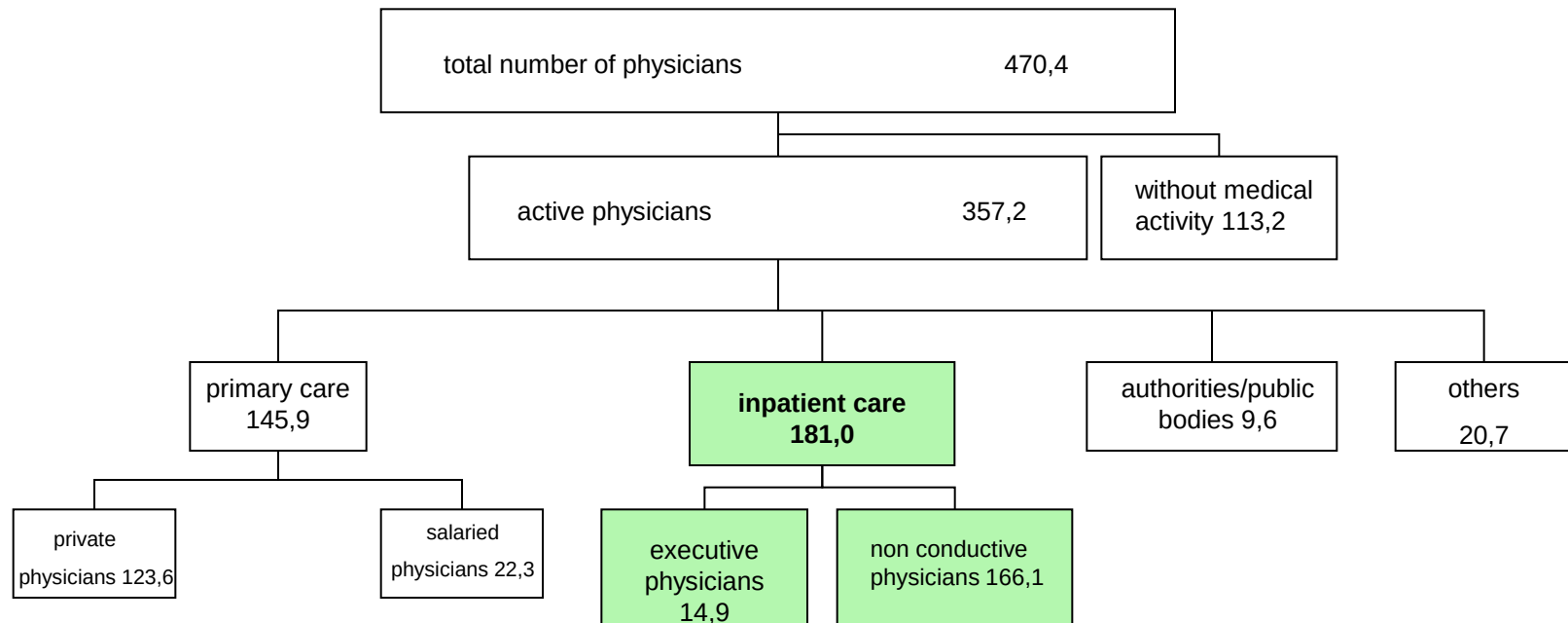
Source: Federal Statistics Agency

*excl. non-full-time doctors/dentists and excl. personnel in training institutions



Structure of medical professions 2013

(numbers in thousand)





Facts at a glance

beds: ca. 500.000
public: ca. 220.000
private: ca. 80.000
charity based: ca. 160.000

hospitals: almost 2.000
public: 596
private: 694
charity based: 706

18,8 Mio. **inpatient patients**
20 Mio. ambulatory patients

occupancy rate: 77,3 %
occupancy days: 142 Mio.
length of stay: 7,5 days

income: ca. 86 billion €
SHI: 64,2 billion. €
PHI: 6,9 billion. €
investment: 2,7 billion. €

employees: 1,1 Mio.
180.000 doctors
400.000 nurses





Hospitals

On the same legal basis

Same working conditions

Open to all patients/ Free choice

Same admission conditions



Reimbursement under the same conditions

Same quality standards



Thanks and contacts

German Hospital Federation
RA Marc Schreiner, LL.M.
Director EU-Policies/International Affairs
Health economics

Wegelystraße 3
10623 Berlin

Phone: +49 (0)30 – 39801 1030
Fax: +49 (0)30 – 39801 3011
Mail: m.schreiner@dkgev.de
Internet: www.dkgev.de

