



Growth Market eHealth

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GERMANY
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I. The German Healthcare Market

II. Potentials of eHealth

a) Telemedicine

b) mHealth

III. Contact

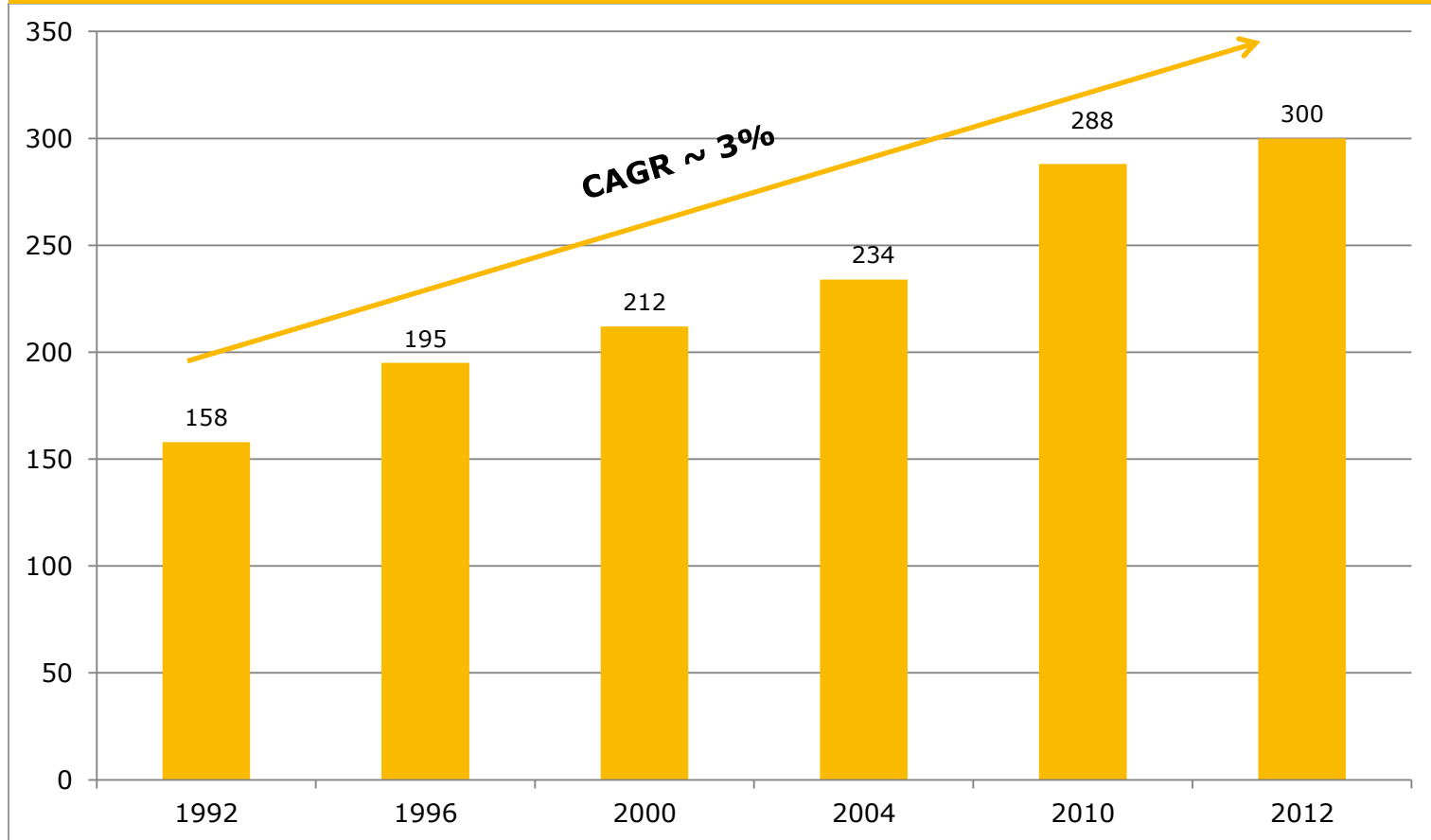
Doing more with less

- Growing number of patients
- Increasing costs
- High demand for efficiency



- **Use of information and communications technology to enhance efficiency and maintain high quality in healthcare provision**

Health expenditures in Germany 1992-2012 (in EUR billion)

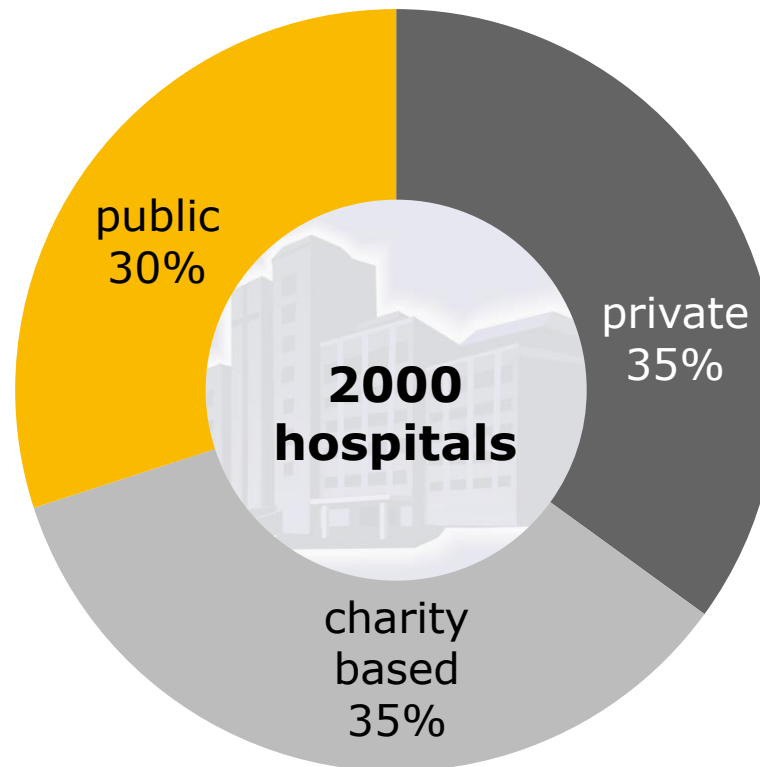


Source: Statistisches Bundesamt 2014

Europe's largest healthcare market

- **80.8 million** inhabitants
- **70 million** people in Germany have public health insurance
- **9 million** people have private health insurance
- **132** public health insurance companies
- **2000** hospitals with **501,000** beds in Germany
- **6 million** people are employed in the German healthcare industry

Hospital ownership in Germany 2013



Source: Statistisches Bundesamt, Grunddaten der Krankenhäuser 2013



Aging Society

- 2035: 24 million aged 65 years or older (31% of the population)



Care dependency

- 2020: 2.5 to 3 million
- 2050: 3.25 to 4 million



Chronic Diseases

- Chronic and long-term diseases account for about 80% of the German healthcare spending



Use of Internet

- Around 77% (63 million) of the German population are regularly online
- Most internet users in Europe



Software Market

- Single largest software market in Europe
- 24.5% of the European software market by value



Mobile Devices

- About 26 million smartphones were sold in 2013 (23 % increase compared to 2012)

- Growing demand for healthcare services drives the development of digital healthcare solutions.
- Germany's digital economy offers outstanding conditions for new products and solutions in the healthcare industry.
- Steady growth of revenue is predicted for both eHealth and telemedicine in Europe and in Germany.



Europe

eHealth

- market growth 2010-2020: 5% p.a.
- revenue in 2020: EUR 34 billion

Telemedicine

- market growth 2010-2020: 10% p.a.
- revenue in 2020: EUR 19 billion



Germany

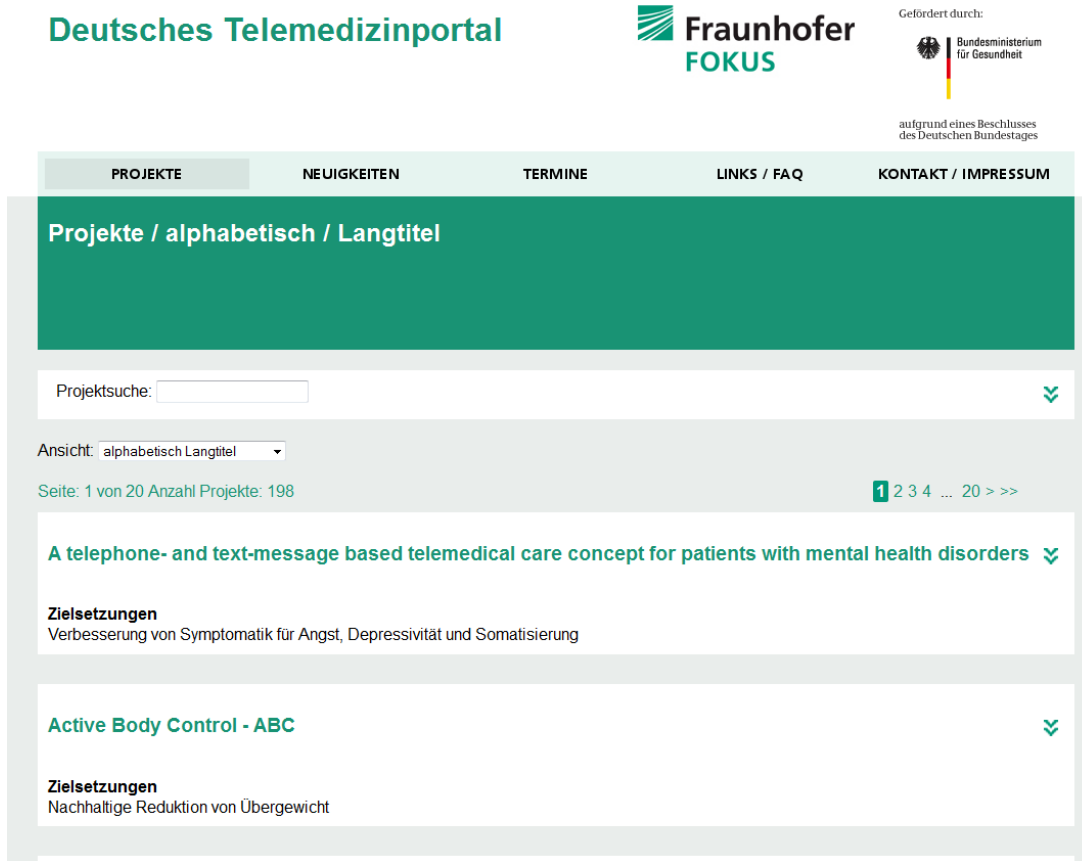
eHealth

- current revenue: EUR 6.5 billion
- market growth: 10% p.a.

Telemedicine

- market growth: 20% p.a.
- current market share: 25% (expected to rise up to 30%)

Deutsches Telemedizinportal – A measure of the eHealth initiative of the Federal Ministry of Health

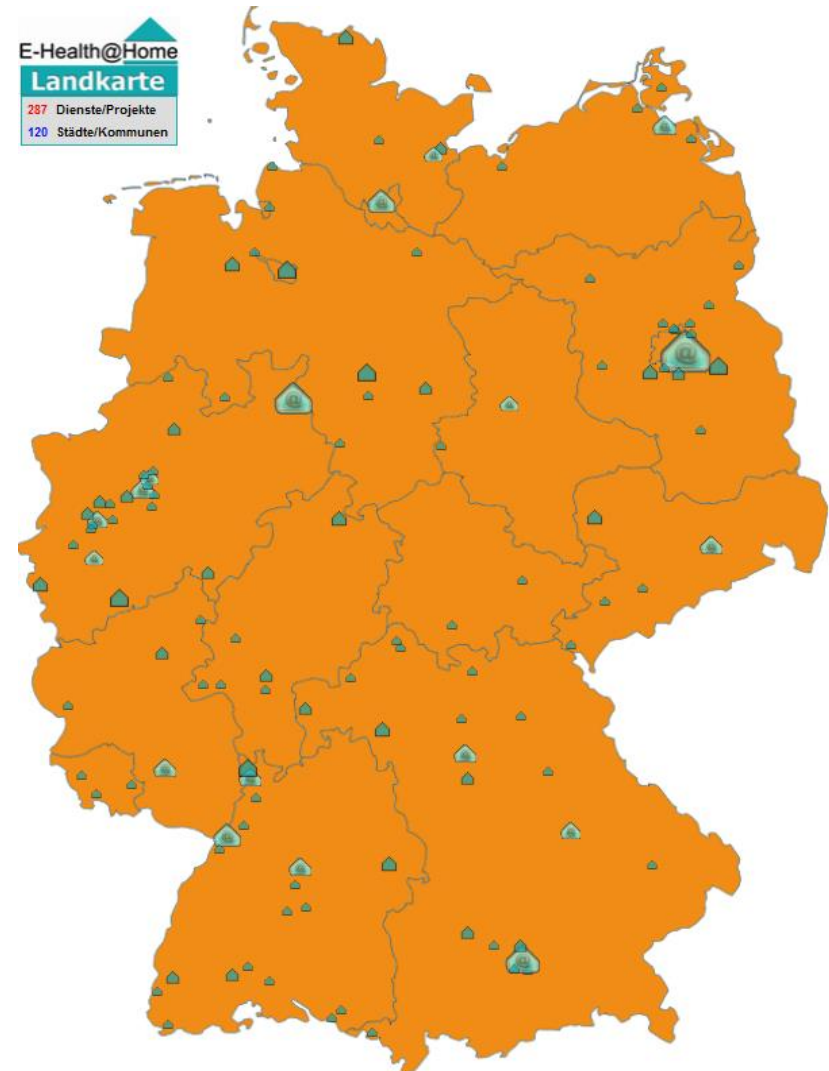


The screenshot shows the homepage of the Deutsches Telemedizinportal. At the top, there is a header with the portal's name, the Fraunhofer FOKUS logo, and a note about funding by the German Federal Government. Below the header is a navigation bar with links for PROJEKTE, NEUIGKEITEN, TERMINE, LINKS / FAQ, and KONTAKT / IMPRESSUM. The main content area is titled 'Projekte / alphabetisch / Langtitel' and features a search bar, a view selector set to 'alphabetisch Langtitel', and a pagination indicator showing 'Seite: 1 von 20 Anzahl Projekte: 198'. Two project entries are visible: 'A telephone- and text-message based telemedical care concept for patients with mental health disorders' and 'Active Body Control - ABC', each with a brief description of its goals.

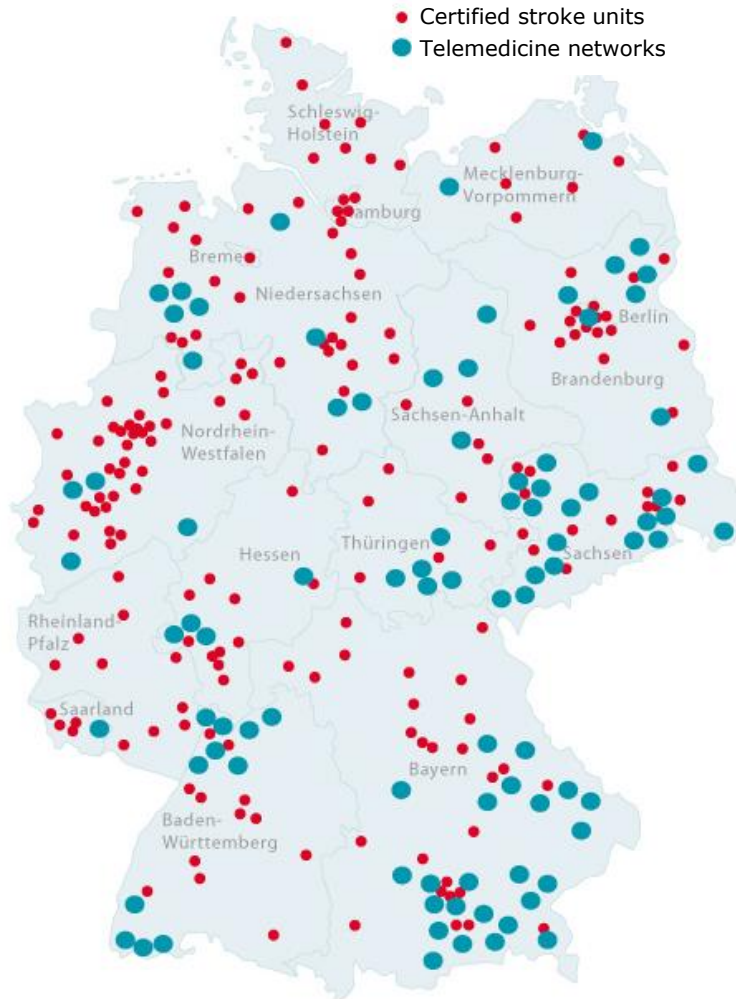
- The technical implementation of the portal is carried out by the Fraunhofer-Institut FOKUS.
- The portal enables the nationwide search for information about already implemented and ongoing telemedicine projects.

About 240 telemedicine projects in more than 100 cities and communities.

- *E-Health@Home* provides:
 - ✓ an interactive map
 - ✓ a geographical overview of 240 telemedicine and Ambient Assisted Living (AAL) projects
 - ✓ detailed information about participating hospitals, institutes and companies
 - ✓ statistics showing general, technical and economic data of the projects



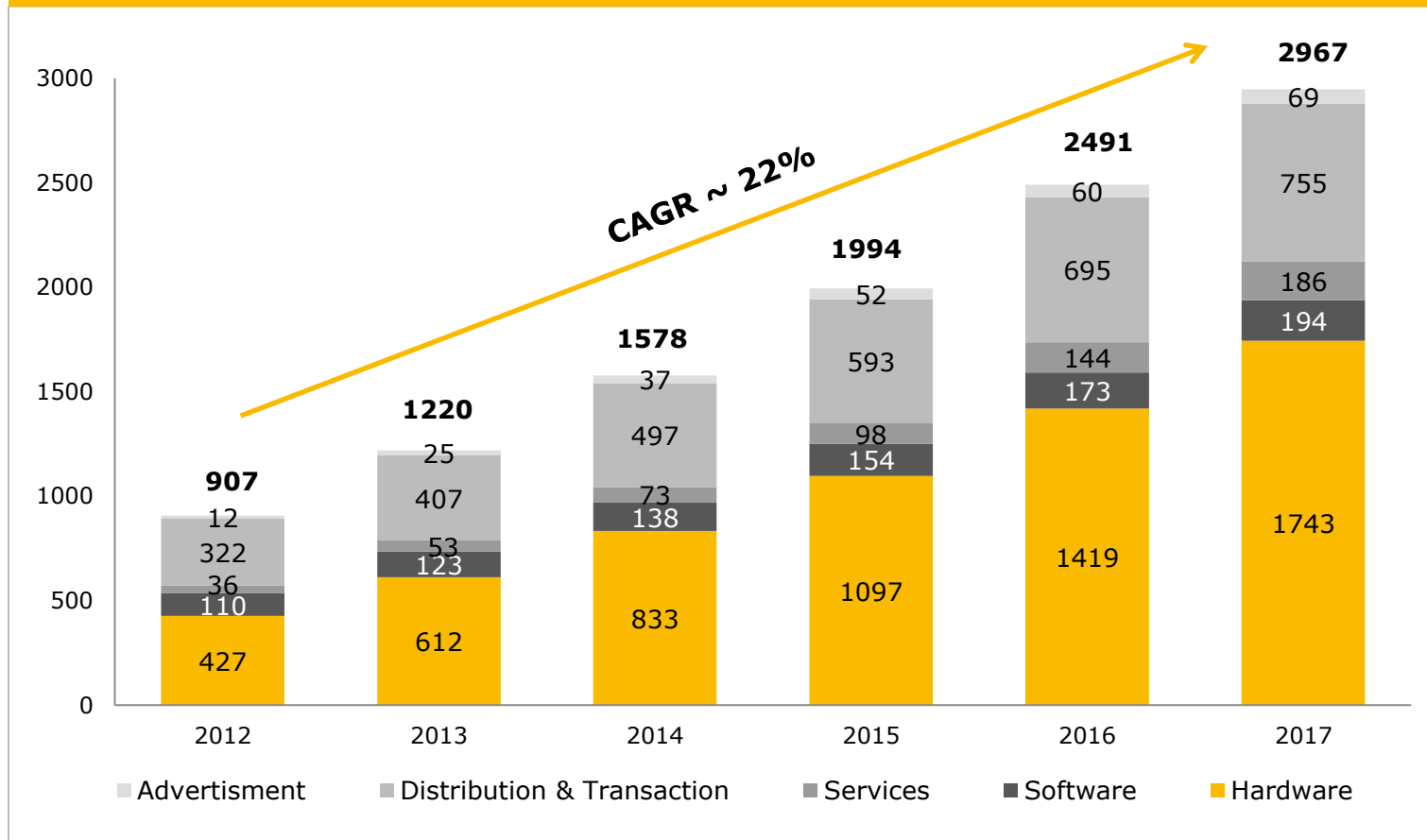
Germany has a dense network of certified stroke units and tele-stroke units.



- There are about 250 hospitals with certified stroke units.
- Telemedicine complements high quality and comprehensive medical care of stroke cases in rural areas.

- 45 percent of the German population use their private mobile devices for digital health purposes.
- Remote monitoring is the key segment of mHealth in Germany.
- The German mHealth market will grow to about EUR 3 billion during the next 3 years.

Development of the mHealth market in Germany until 2017 (in EUR million)



Source: A.T. Kearney 2013

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