



## **New publication: dostal-handbook. The German health care market (fourth edition).**

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The health care market and the health care economy are subject to constant changes. This happens on the one hand unobtrusively and slow, and on the other hand very quickly. Much of it is visibly politically driven, but most of it is rather subject to entrepreneurial behavior. It has also become impossible to look at the health care market, its interaction and its different dynamics from a single perspective only. Therefore the planned health care system (First Healthcare Market) presents itself visibly and due to additional demanded financial resources and income, either for occupational groups (for example private practitioners, hospital doctors, nurses, etc.), or even entire sectors (for example prohibition of mail-order trade for the protection of inpatient pharmacies, investments in hospitals), stamped by lobbies and clearly perceptible. At the same time significant corporate decisions and changing consumer trends are covered else-where. The actors, i.e. the entrepreneurs and decision-makers find it difficult to develop or maintain their own „panoramic ability“ in the health care market. This is what the dostal-handbook has pursued for almost ten years: to make the health market transparent for the actors and influencers, so that they can target more effectively their own goals and realize their opportunities.

This lack of transparency and sometimes also polarization of the health care market is fostered by a number of problems, challenges and risks within the media. From hygiene deficiencies in the inpatient area to manipulations of medical diagnoses, unadjusted medication for patients, wrong alimentation of a huge mass of consumers and the often promoted collapse of medical care in the countryside. At the same time, however, there is an increasing market concentration, the development of „more compact“ units and higher company growth: for example the hospital and rehabilitation companies are not only growing in volume and internationally, but they are also developing into educational groups. The laboratory sector is experiencing industrialization, the players from the wide range of the health care market are cooperating in health centers and the fitness industry is experiencing a non-stopping boom, just to quote three more examples.

At the same time the ghost of a human resource reducing industry 4.0 is also painted on the wall in some areas of the health care system. In parallel, however, the patient and the (still) healthy consumer is paid too little attention, i.e. time, due to lack of sufficient budgets. It should also be noted that health policy is overrating the ability of health care providers, e.g. The German Joint Federal Committee (G-BA), the cost object and overcharges it simply with always new tasks. The increasing demand for resources in the health care sector will be hardly any more calculable, last but not least because of the worsening of the (socio-) demographic situation with its cost burden as well as the unmanageable costs of the long-running refugee waves and thus new costs covered by no income (health) costs, The allocations to the health fund with new government debt money from households, hardly more calculable.

It is also uncertain whether the revenues in the Second Health Market (expenses of companies and consumers or patients for health who are not covered by SGB costs) will continue to rise. However, the revenues of the Second Healthcare Market already amount to more than 150 billion euros, which is half of the health care costs financed by the health care system. However, these revenues depend massively on the overall economic development of the country. At the same time, a recent survey by the authors shows that the second health care market is starting to take over. Is this going to be sustainable? - In Germany, however, poverty and massive educational deficits are increasing, so that more than 20 million consumers of all age groups, with an increasing tendency to become relevant customers, are more or less eliminated. The „perceived“ prosperity of the other consumers is only „liquidity prosperity“, created by a „loose monetary policy“ of the European Central Bank for almost two decades.

The mechanism to open up efficiency gains and new market shares in the future, is now clear for a large number of players in the health care market and health economy: an increase in cooperation across the health sectors as well as the integration of health care providers from the Second Health Market into the whole value chain from health care and health promotion to the field of repair medicine overrated by the media, will help to open up the opportunities. The respective prerequisites for cooperations also form the basis for the present dostal handbook



of the German health care market. In addition to a broad presentation of the Second Healthcare Market, the regulations and training of the various health professions and activity fields are also examined in light of their respective development. They form the defining foundation for future entrepreneurs or employees to work especially in the Second Healthcare Market. In addition, for the first time, regarding the two aspects of health promotion and cost-efficiency, the healing teachings branches imported decades ago as well as the healthcare sector centering around the subject of „corporate/company health management“ play an important role in the presentation. On the other hand, important B2B industries, e.g. IT, corporate consultancy, communication/advertising, catering, medical technology, education and media are dealt with briefly for reasons of clarity only.

This handbook is a continuation of the current editions: it adapts itself in its structure to the changing market conditions and developments. In the first issue the focus was on the first-time compilation of the health care market in the context of a holistic approach to health (2008). With the inclusion of the Second Healthcare Market, the focus for the actors, entrepreneurs and decision-makers has been expanded for the first time against the cramped focus „health care market = state-run health care system“. The second edition was presented in terms of the break-up into the market age (2009). In focus was the struggle of the actors to reach the people with health messages, which contain a health-promoting and health-conscious behavior. The health care market was subdivided into 17 submarkets to provide a closer look with the help of central brands. But the development continued.

The voluminous third edition of the dostal health market manual with more than 900 pages followed in 2012. This time under the perspective „With the 6th Kondratieff to a sustainable economic recovery“. 13 business-to-consumer (B2C) markets and seven business-to-business (B2B) markets were presented. In doing so, those submarkets which tend to provide a contribution to popular and economic development and those which are obviously less likely to do so are made transparent. This edition also covered the legislative incentives for cross-sectoral cooperation in health care. Here, the fourth edition, which is now available, concludes that more than ever also positions the Second Healthcare Market as a potential partner. This is supported by numerous developments in the past five to six years which are still to be discussed.

This handbook begins with a brief presentation of the origin and development of health care and the second health care market. This makes it easier for the actors to take a modern and innovative outlook on „health“ as a macroeconomic challenge in the 21st century and the associated opportunities but also the framework conditions. The subsequent dimensioning of the entire health care market outlines this new transparency. This is reflected in the different presentation of the health care system and the second health care market: for one thing through the statistically detailed sectors of the health care system, including the health care sector. And for the other through the partially regulated and unregulated professions and free-lance jobs, and the (retail) trade, which both are dominating the second health care market.

This dostal handbook „Healthcare Market in Germany“ is also intended to promote the „Panoramic ability“ of entrepreneurs and decision-makers throughout the German-speaking world, which fosters their economic success due to the increased transparency of the markets and industry and the identification of possible starting points for cooperation with stakeholders from others Industries. That this is possible and actually self-evident often results from the fact that many health services and services have the same or similar historical roots: That is the reason for an introductory „look back“ in order to be able to optimally shape the future. By doing so it gets easier to get involved in seemingly „strange“ or even „absurd“ sectors and industries. At the same time it creates transparency for analysis and decision-making, despite numerous incomprehensible technical terms and usually hardly comprehensible and dissuasive formalities. The hidden chances have to be realized with the help of figures, facts and trends.

This handbook follows further editions seamlessly and illustrates the first and second health care market in relation to supply structure, regulated health professions and their historic origin, market regulations, market sizes and structures as well as trends and developments with their major driving factors.

The dostal-handbook (written in German) is of high interest to decision-makers and participants in the fields of health insurance companys, (medical) healthcare providers as well as further health professions, medical technology, IT and service providers, wholesail and retail, B2B-businesses, cross-selling partners, associations, university and reasearch, consultancy and PR agencies.

Further information abouth dostal-handbook, a reading sample (written in German) and the order form at our website [www.dostal-partner.de](http://www.dostal-partner.de) [1]



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[1] <http://www.dostal-partner.de>