



**OSLO CANCER
CLUSTER**

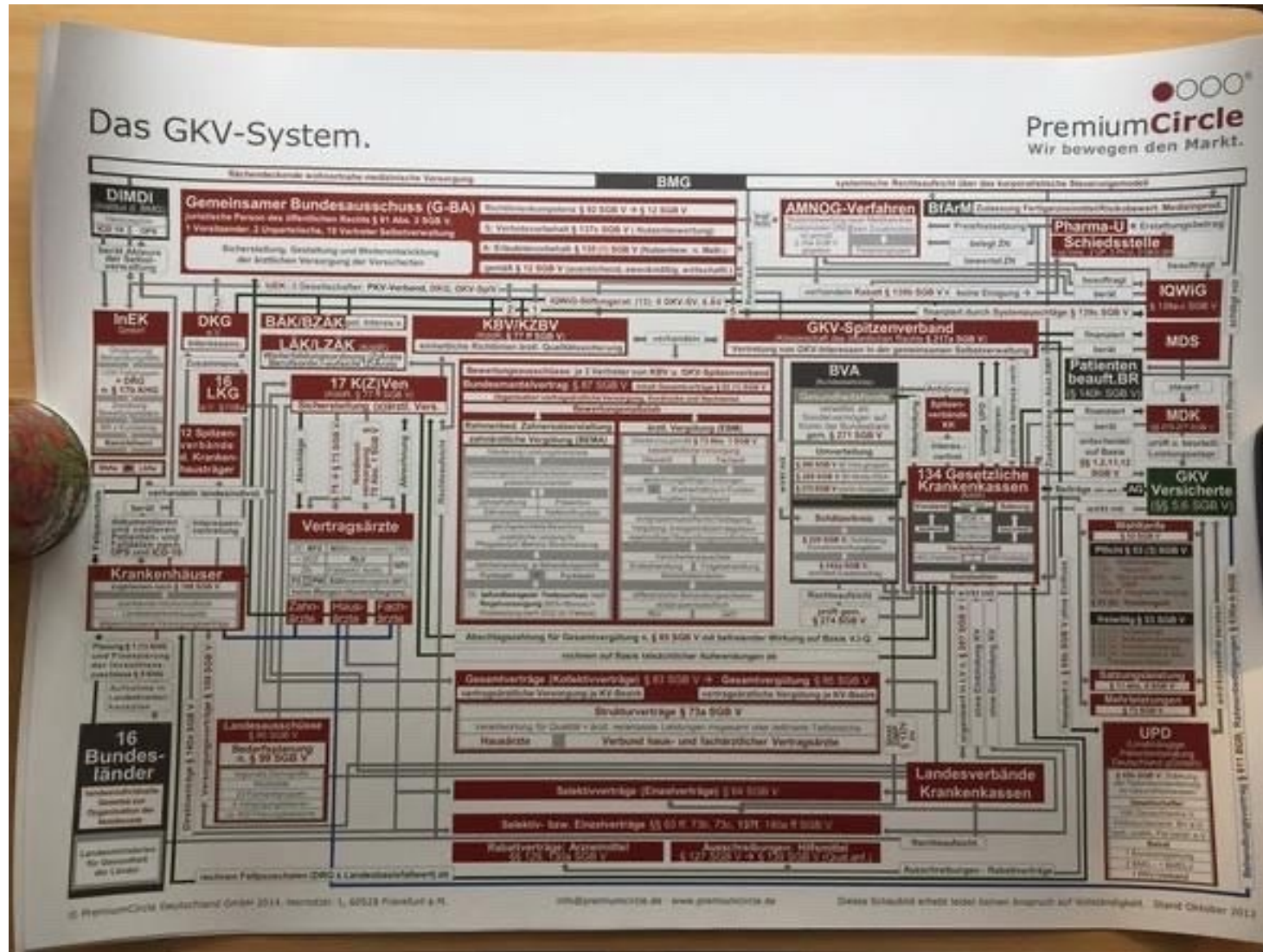


A GLIMPSE INTO GERMAN HEALTHCARE PROCUREMENT

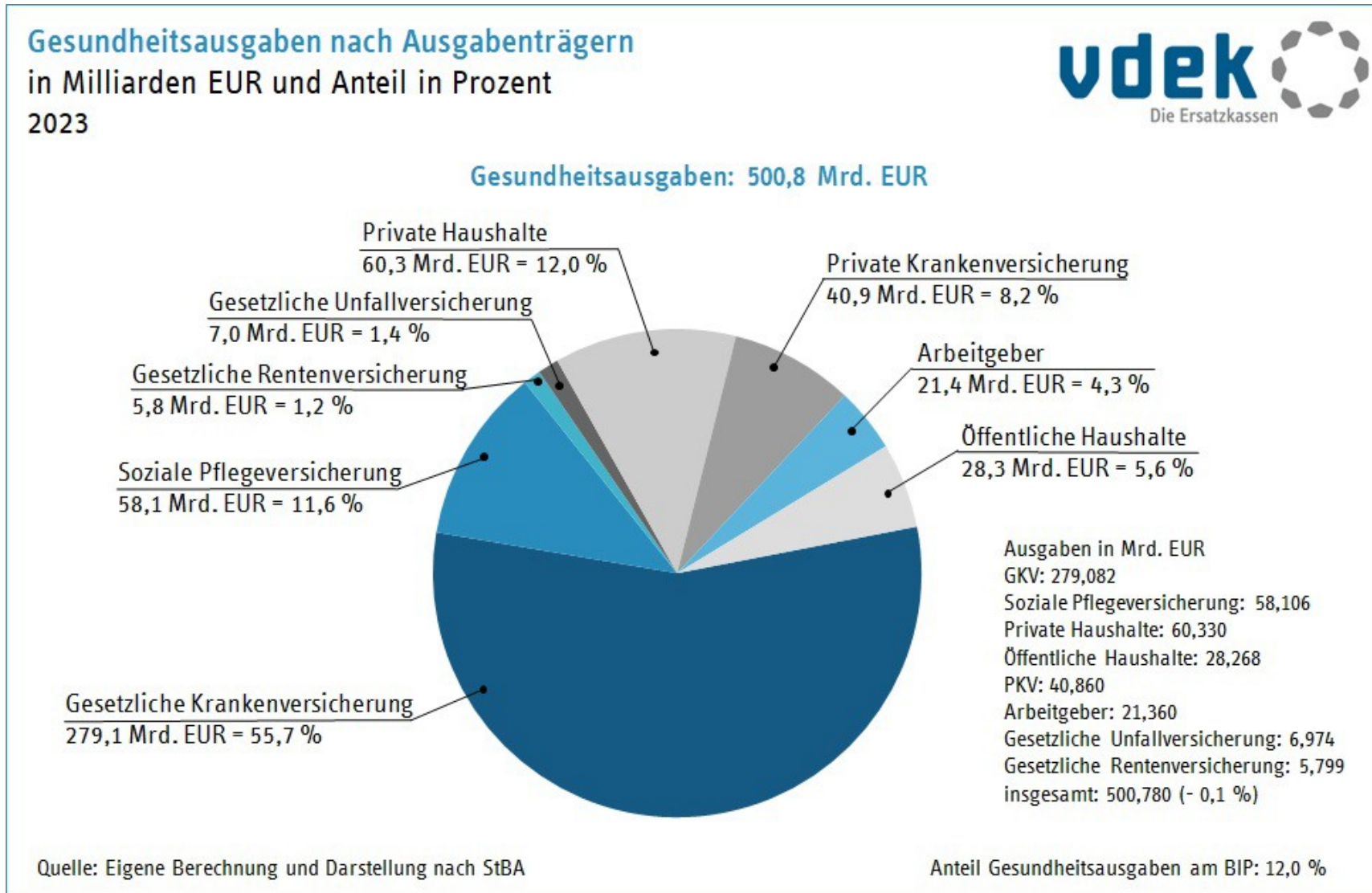
Strength in numbers.

April 14, 2026

HEALTHCARE SYSTEM GRAPH



HEALTHCARE SYSTEM COSTS

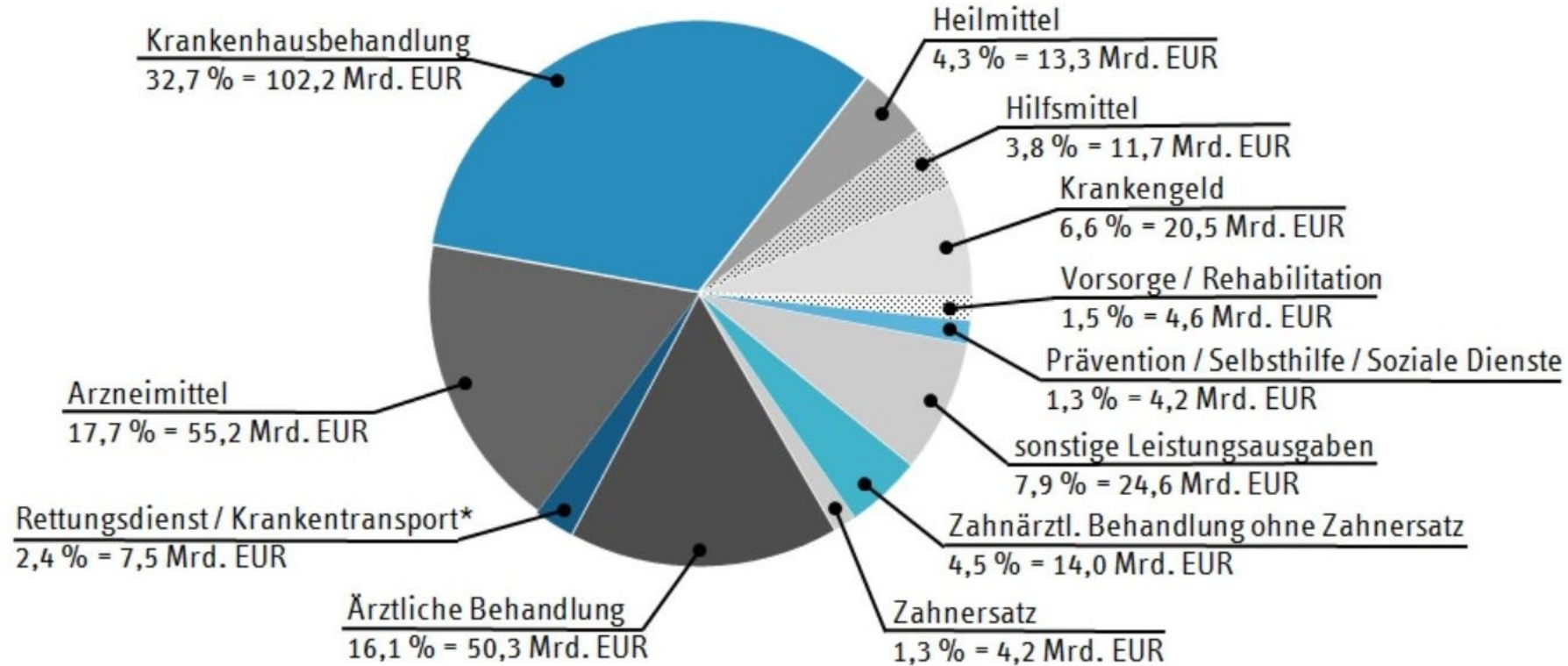


HEALTHCARE SYSTEM COSTS (2024)

GKV - Leistungsausgaben
in Milliarden EUR und Anteil in Prozent
2024



GKV-Leistungsausgaben: 312,3 Mrd. EUR

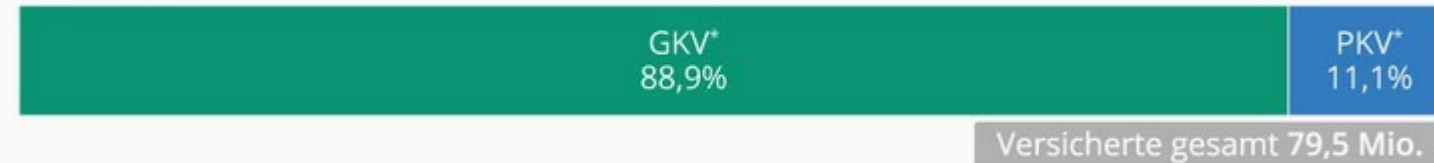


HEALTH INSURANCE IN GERMANY

Wie ist Deutschland krankenversichert?

Versicherte und Ausgaben der gesetzlichen und privaten Krankenversicherungen 2015

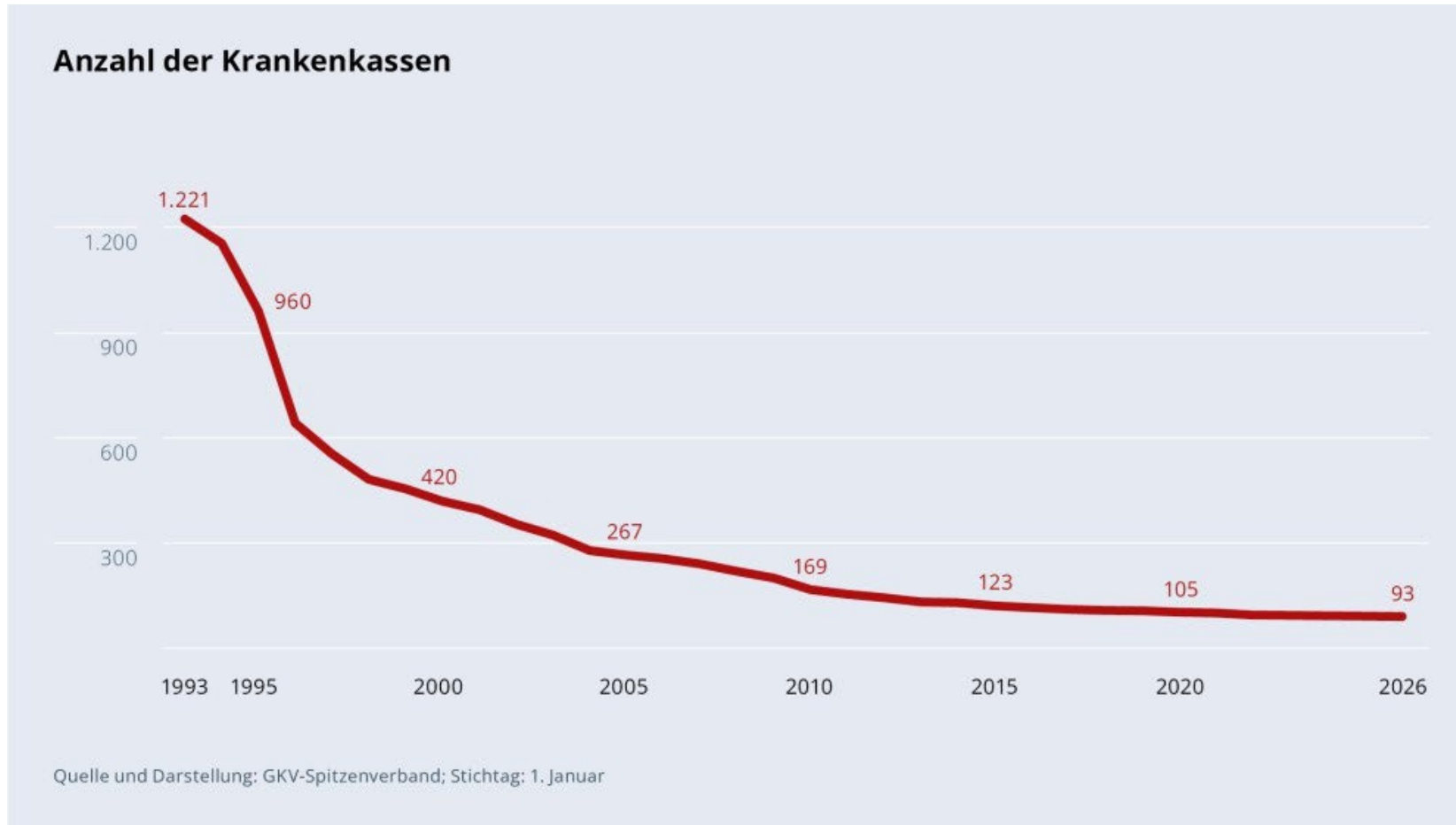
Versicherte



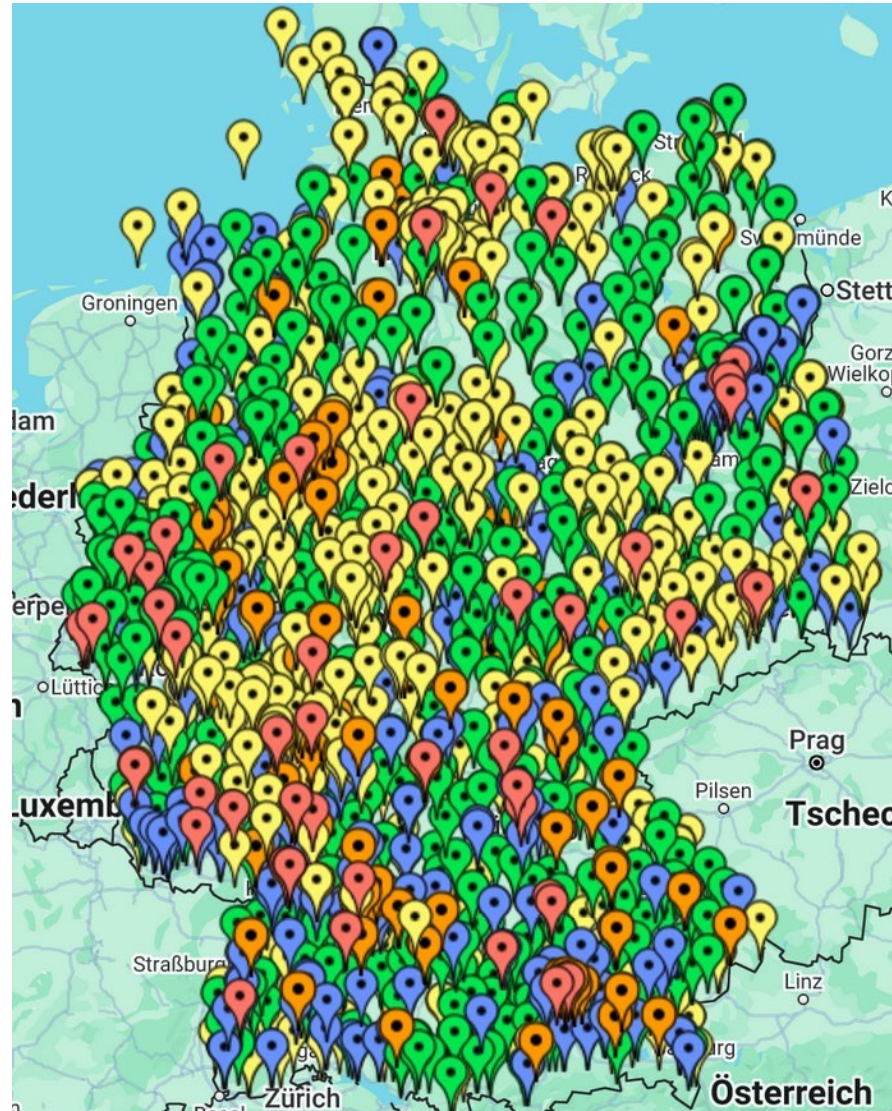
Ausgaben



HEALTH INSURANCE IN GERMANY (TRENDS)



HOSPITAL LANDSCAPE (GERMANY)



LEGENDE

- Krankenhäuser bis 99 Betten
- Krankenhäuser 100 bis 249 Betten
- Krankenhäuser 250 bis 499 Betten
- Krankenhäuser 500 bis 999 Betten
- Krankenhäuser ab 1000 Betten



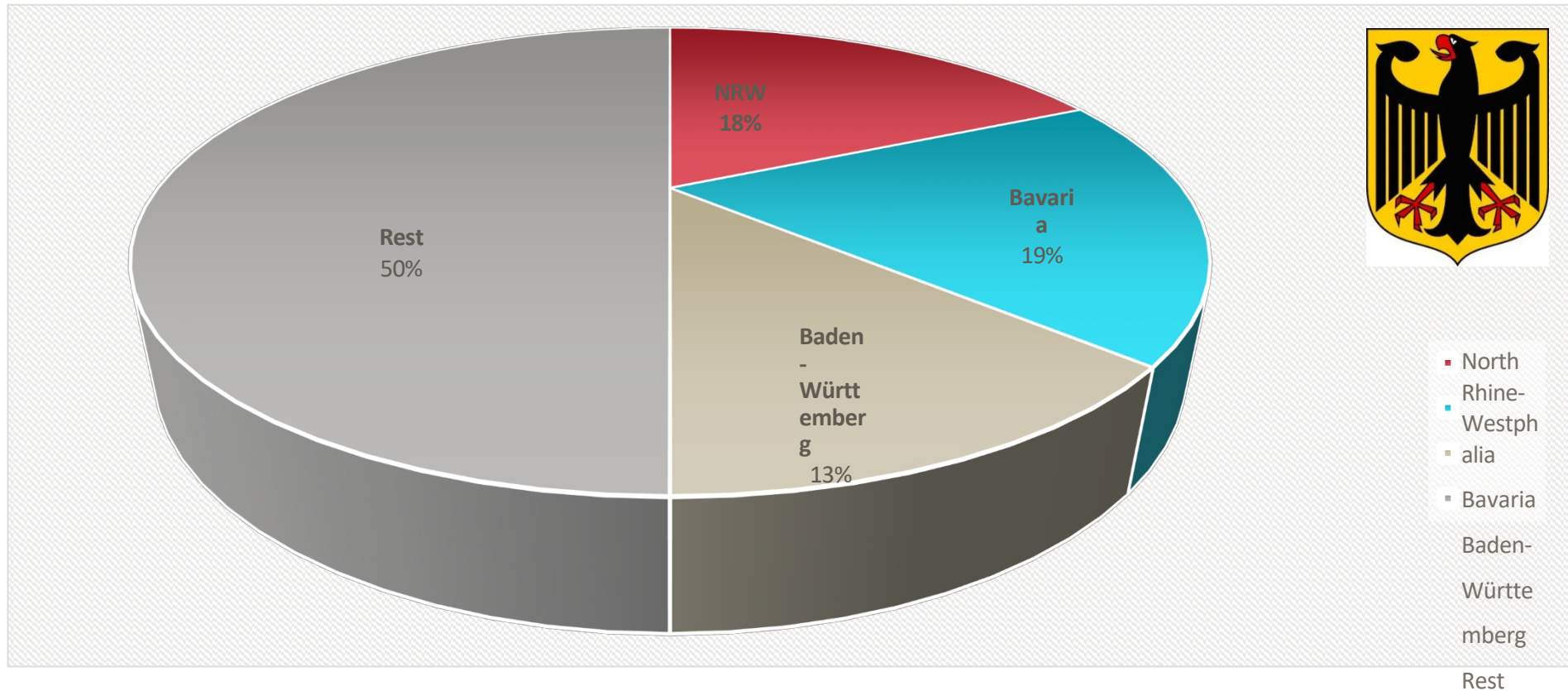
HOSPITAL LANDSCAPE

Total Number of Hospitals in Germany (2024)



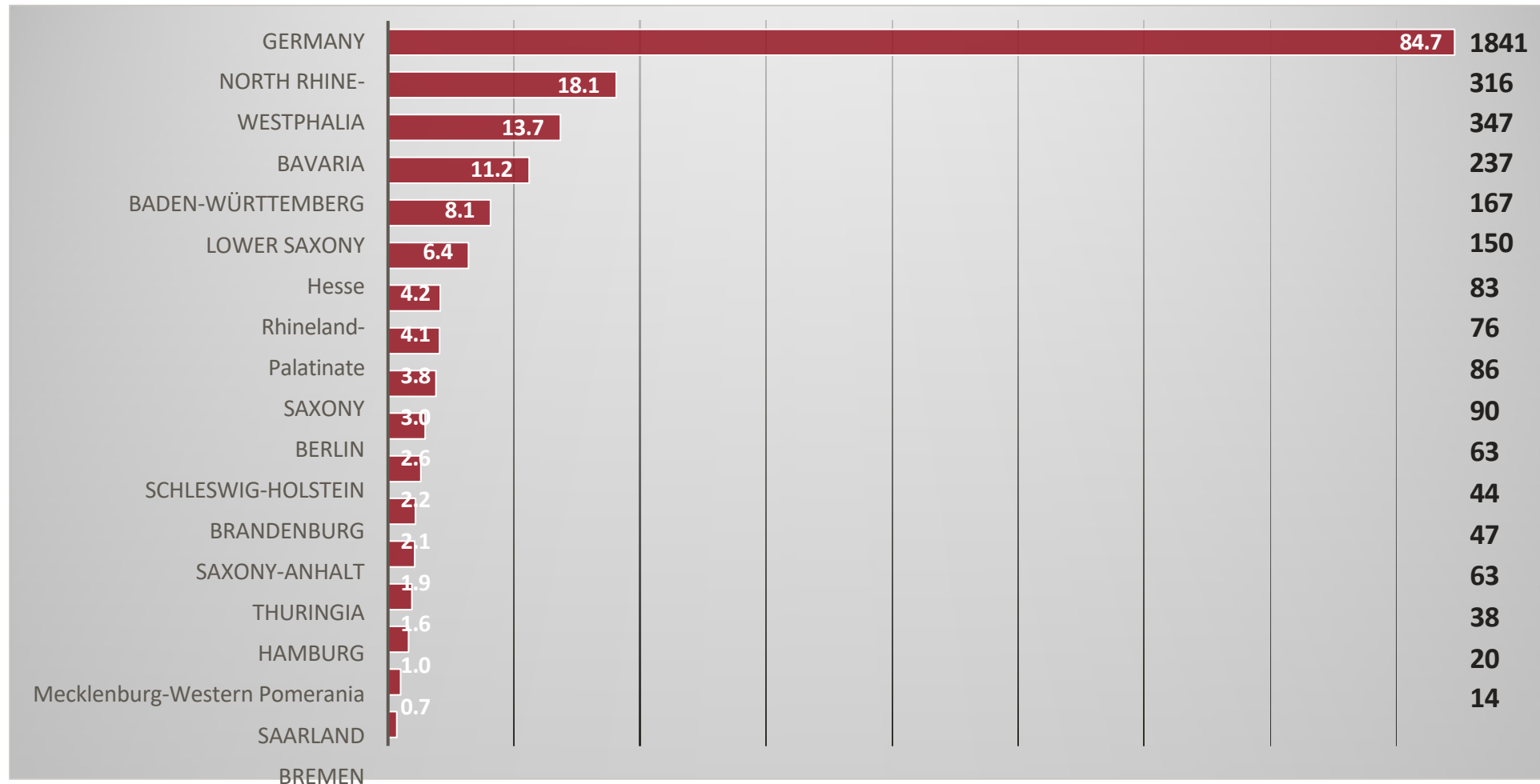
HOSPITAL LANDSCAPE

Distribution of hospitals in Germany by federal state (2022)

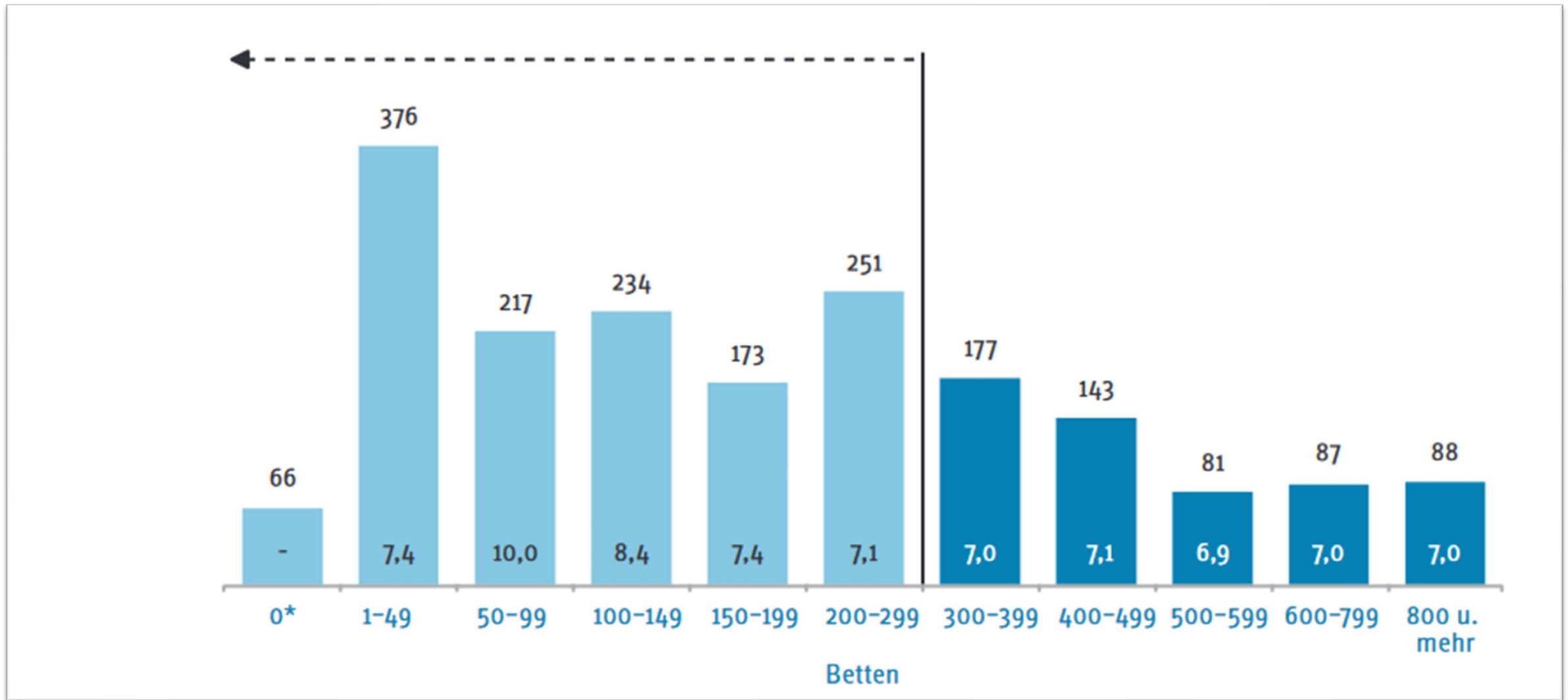


HOSPITAL LANDSCAPE

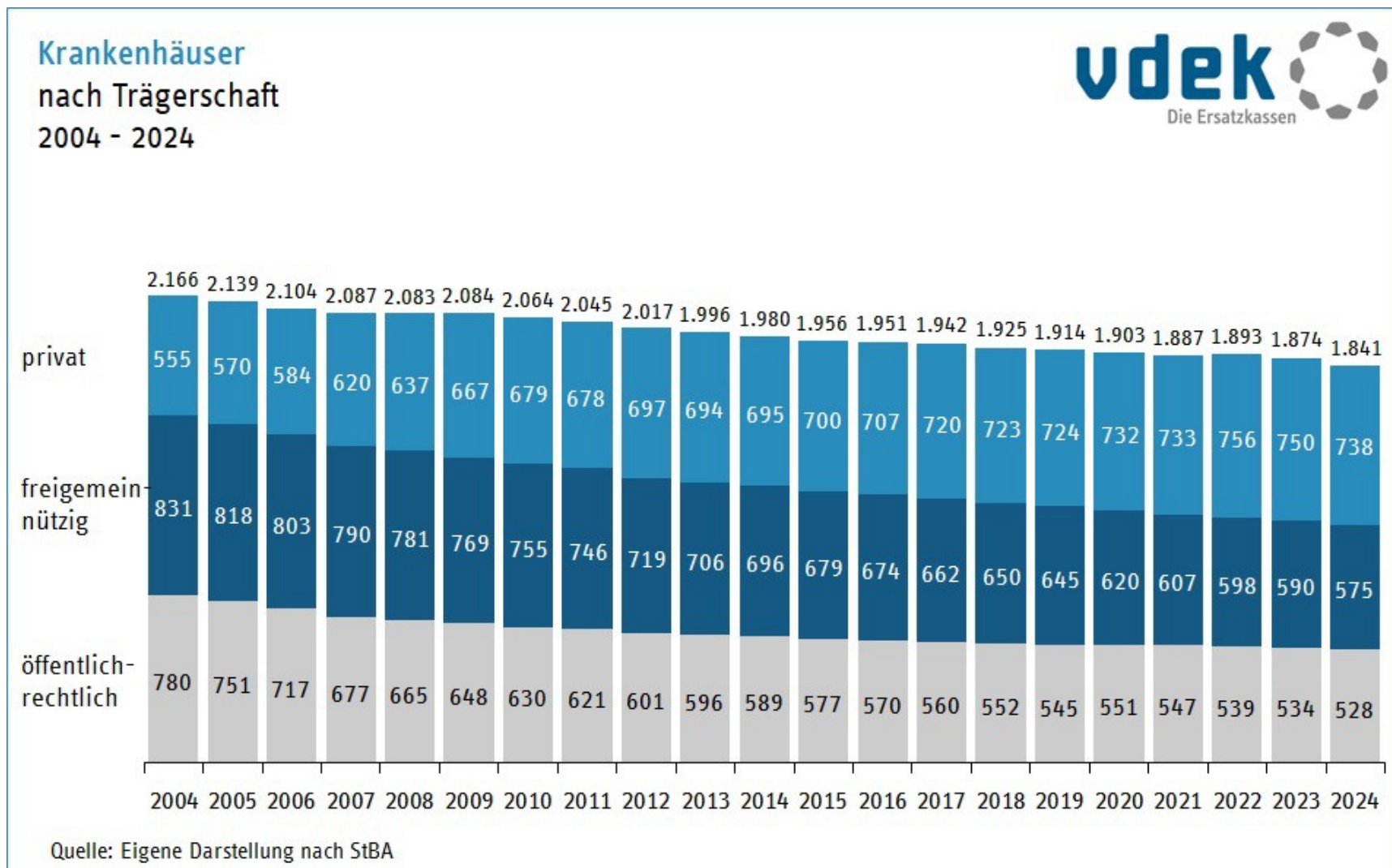
Federal Republic by state (including the number of hospitals per state)



HOSPITAL LANDSCAPE (CLUSTERS BY BEDS)



HOSPITAL LANDSCAPE (DEVELOPMENT THROUGH 2022)



HOSPITAL LANDSCAPE

The Three Types of Hospital Operators

PUBLIC

(PUBLIC-LAW BODIES, INSTITUTIONS, OR FOUNDATIONS).

- FEDERAL AND STATE
- DISTRICTS AND COUNTIES
- CITIES AND MUNICIPALITIES
- LOCAL REGIONAL AUTHORITIES
- PUBLIC-PURPOSE ASSOCIATIONS

NONPROFIT

(UNLIKE PUBLIC BODIES, THESE ARE RELIGIOUS, SOCIAL, OR HUMANITARIAN ASSOCIATIONS)

- NONPROFIT ORGANIZATIONS AND FOUNDATIONS
- CHARITABLE ORGANIZATIONS
- RELIGIOUS ORDERS
- CONGREGATIONS (Monastic Federations)

PRIVATE

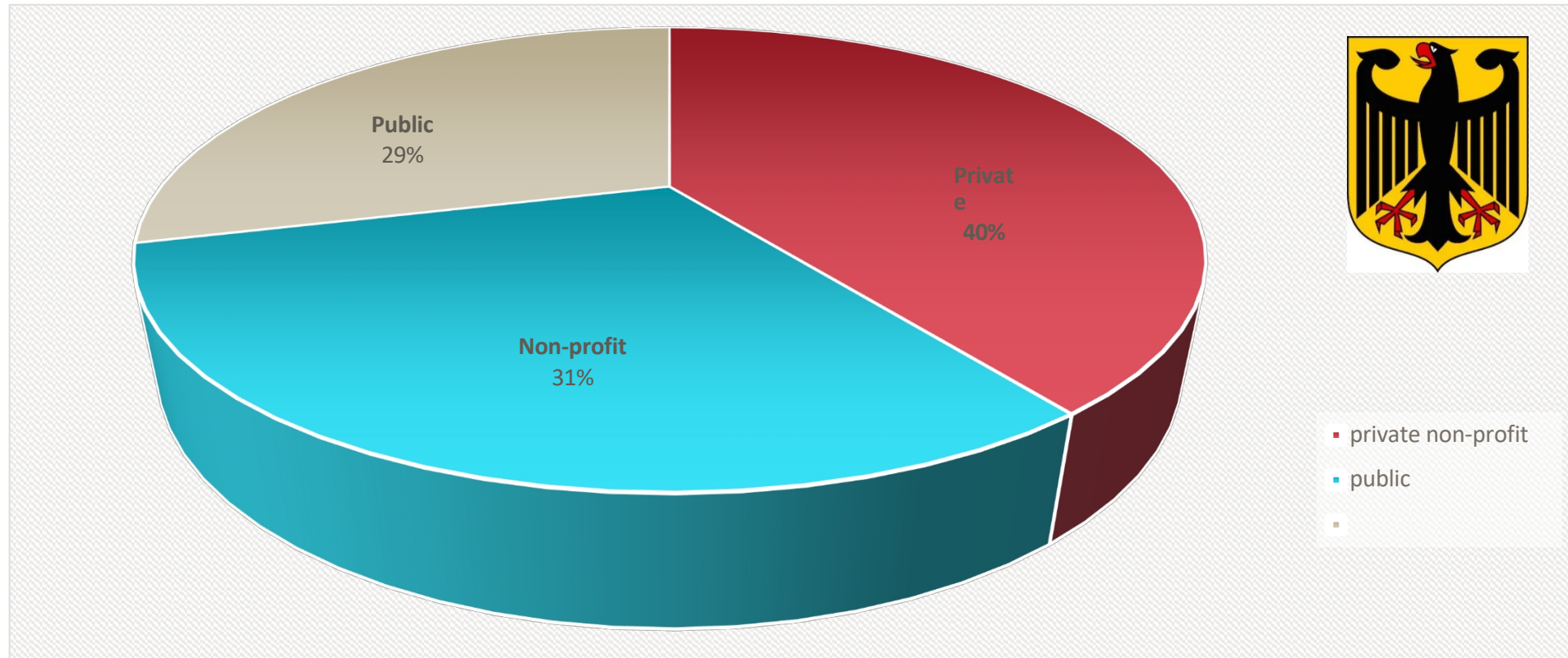
(CORRESPONDING TO NATURAL PERSONS UNDER PRIVATE LAW OR LEGAL ENTITIES)

- CORPORATIONS (AG)
- CIVIL LAW PARTNERSHIPS (GBR)
- LIMITED LIABILITY COMPANIES (GMBH)
- ASSOCIATIONS WITH LEGAL CAPACITY
- PRIVATE LAW FOUNDATIONS

Why is this important to you?

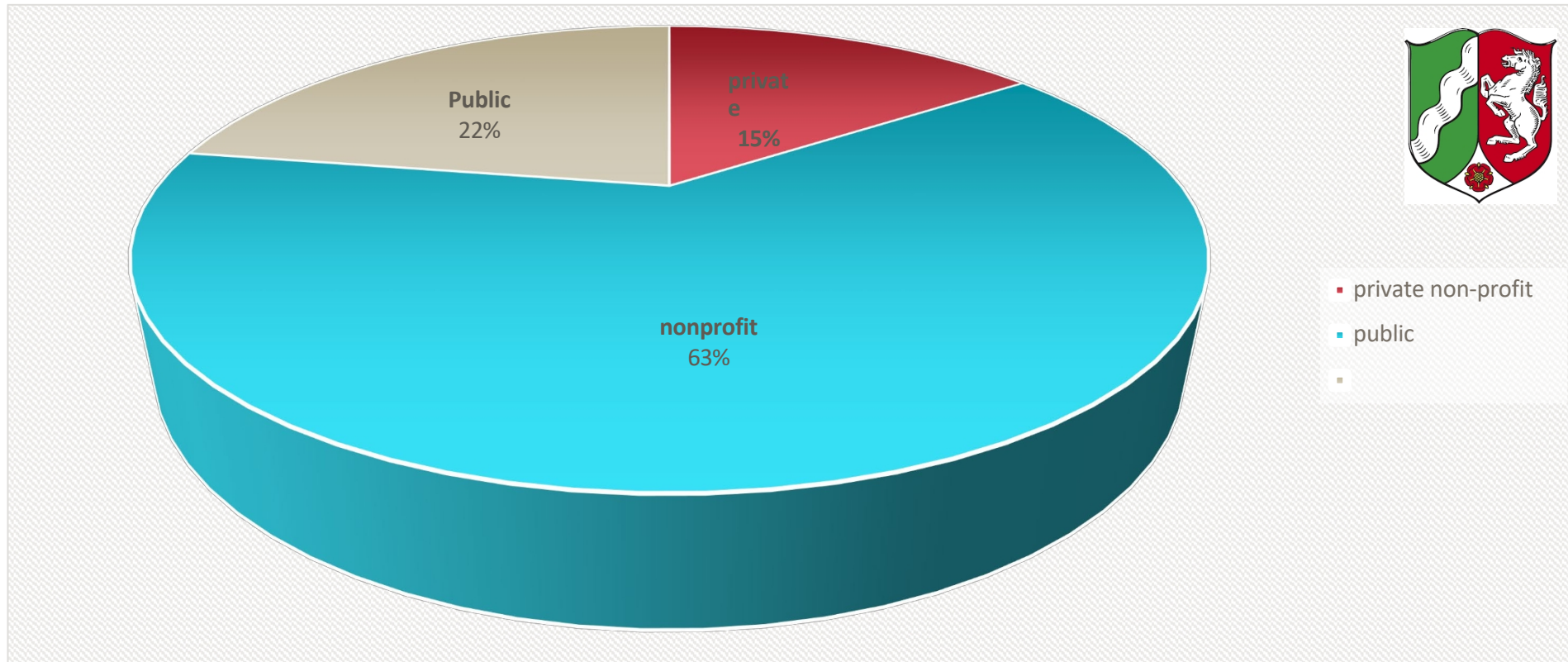
HOSPITAL LANDSCAPE

Distribution of Hospitals in Germany by Type of Operator (2024)



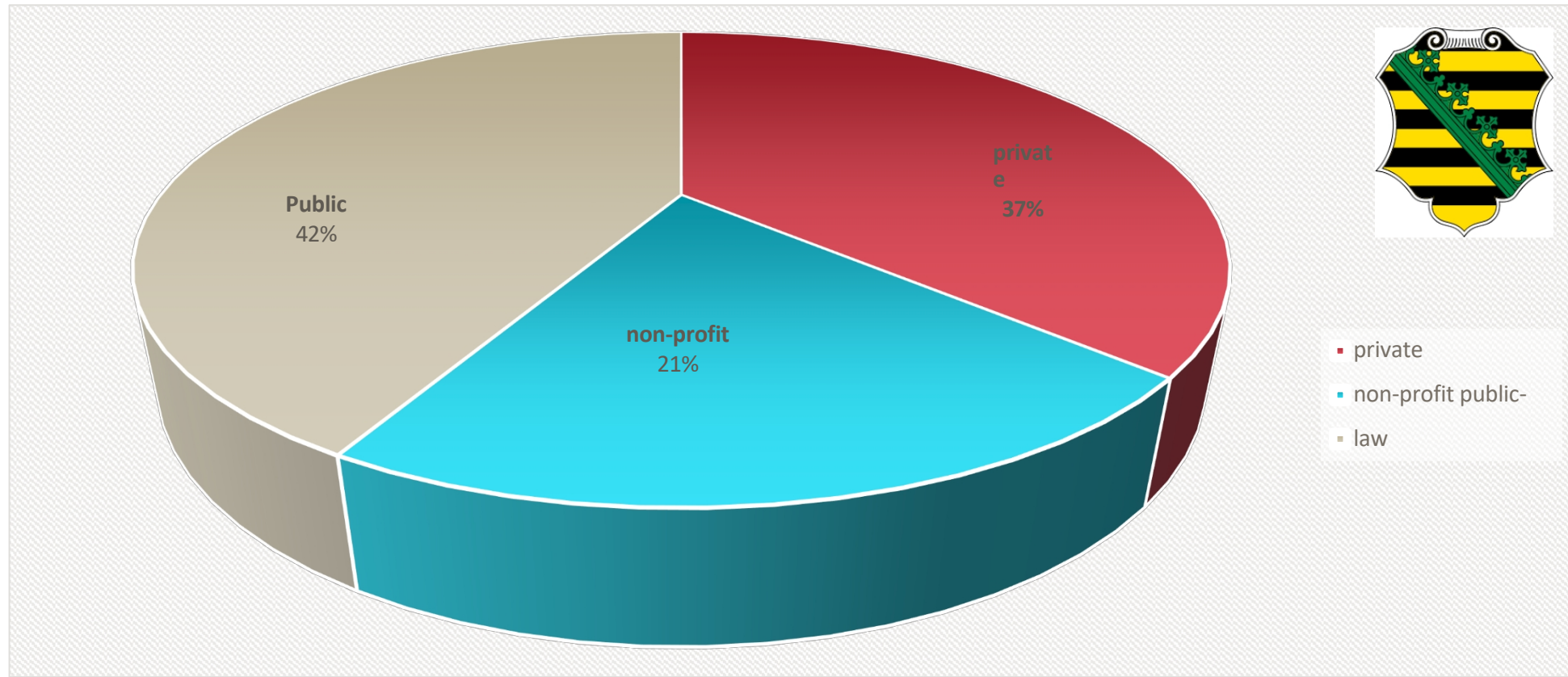
HOSPITAL LANDSCAPE

Total for North Rhine-Westphalia: 335 (72 of which have more than 500 beds and 123 fewer than 200 beds)



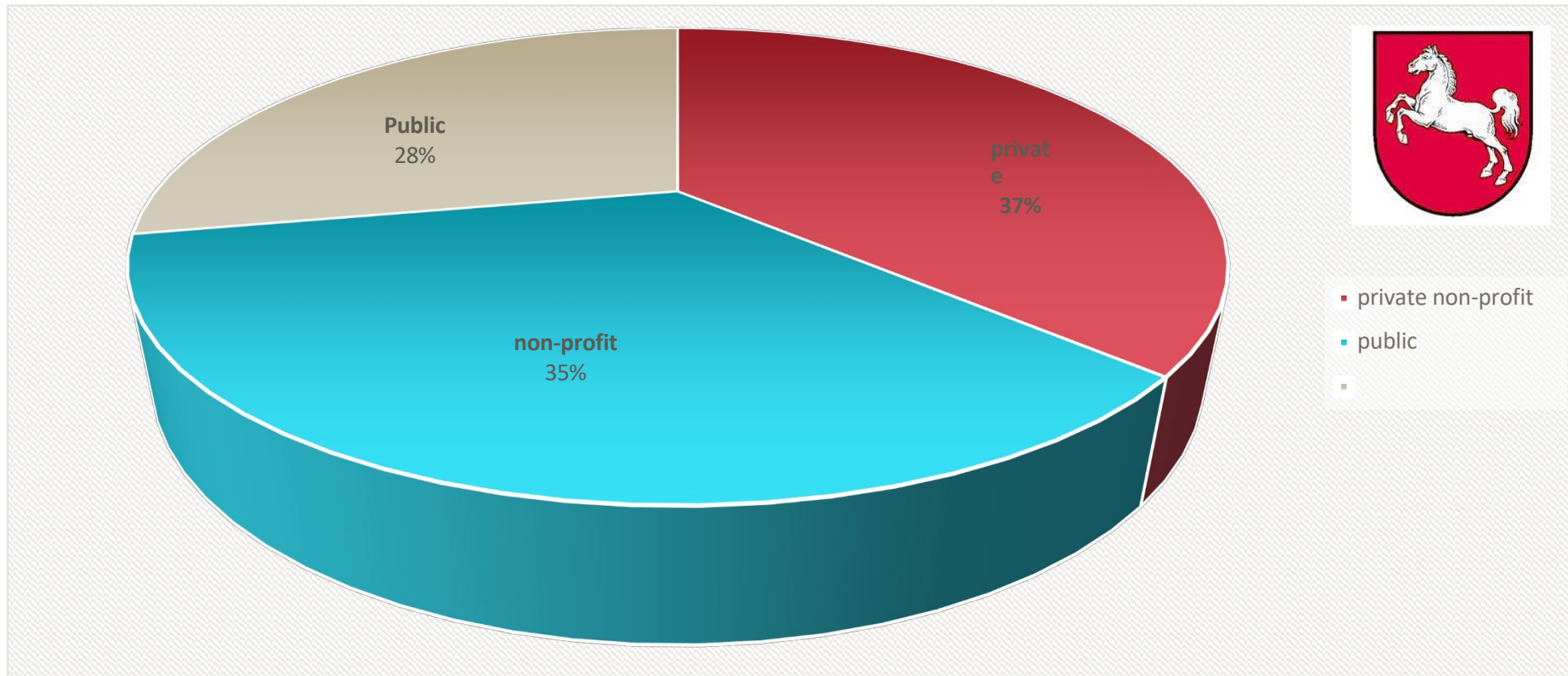
HOSPITAL LANDSCAPE

Total for Saxony: 76 (five of which have more than 1,000 beds and nine fewer than 100 beds)

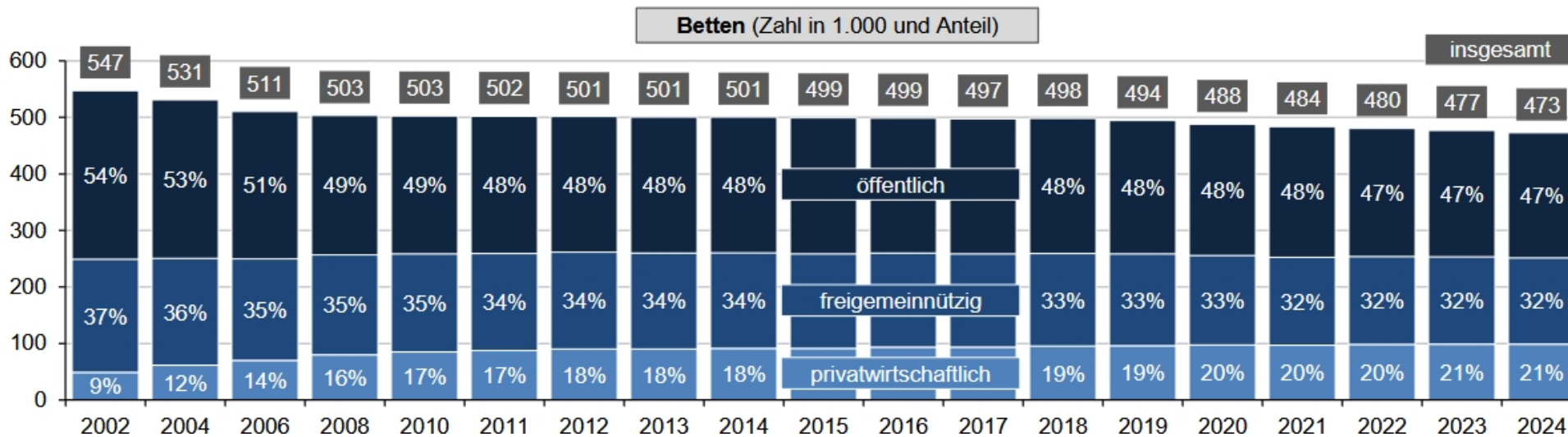
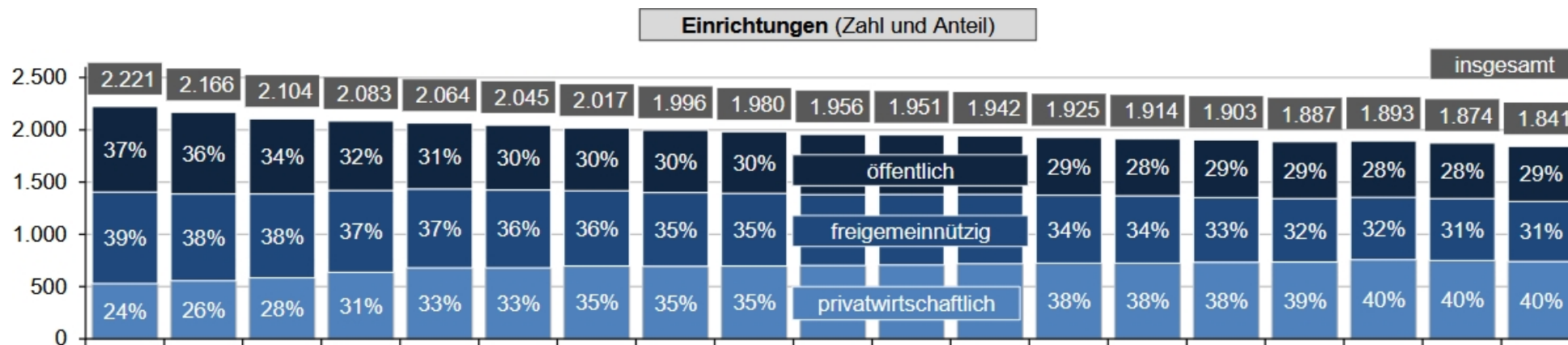


HOSPITAL LANDSCAPE

Total for Lower Saxony: 168 (three of which have more than 1,000 beds and 45 fewer than 100 beds)



HOSPITAL LANDSCAPE



TENDERS IN GERMANY

HOSPITAL OPERATORS	PUBLIC	FREE- NON-PROFIT	PRIVATE
Subject to tender			

TENDERS IN GERMANY



Aktuelle Ausschreibungen der München Klinik

VERÖFFENTLICHT	ANGEBOTS- / TEILNAHMEFRIST	BEZEICHNUNG	TYP	VERÖFFENTLICHER	AKTION
01.04.2026	-	ELT-Außenanlagen	VOB/A Beabsichtigte Ausschreibung	München Klinik gGmbH	Anzeigen →
30.03.2026	30.04.2026	PV-Anlage - Dach KB	VOB/A Ausschreibung	München Klinik gGmbH	Anzeigen →
25.03.2026	-	Heizung-Sanitär-Umkleiden	VOB/A Vergebener Auftrag	München Klinik gGmbH	Anzeigen →
25.03.2026	-	Trockenbau und Türen	VOB/A Vergebener Auftrag	München Klinik gGmbH	Anzeigen →
25.03.2026	-	Baumeister-und Abbrucharbeiten	VOB/A Vergebener Auftrag	München Klinik Schwabing /-München Klinik gGmbH	Anzeigen →
08.03.2026	15.04.2026	Infusionstechnik	VgV <u>TNW</u>	München Klinik gGmbH	Anzeigen →
05.03.2026	-	ELT	VOB/A Vergebener Auftrag	München Klinik gGmbH	Anzeigen →
14.01.2026	-	Jahresrahmenvertrag Schließzylinder	UVgO Vergebener Auftrag	München Klinik gGmbH	Anzeigen →
13.01.2026	-	Planeranfrage -Sanierung zentrale Spüle	UVgO Vergebener Auftrag	München Klinik gGmbH	Anzeigen →
08.12.2025	-	KS-HS 04-WLAN / Installation passives Datennetz	VOB/A Vergebener Auftrag	München Klinik gGmbH / München Klinik Schwabing	Anzeigen →

TENDERS IN GERMANY

- IN MANY CASES, PRODUCTS ARE SUBJECT TO FORMAL TENDER PROCEDURES.
- THEREFORE, HOSPITALS AND GPOS EXPECT:
- HIGHEST PRODUCT QUALITY – CLINICALLY RELIABLE PERFORMANCE WITH MINIMAL RISK OF FAILURE.
- 48-HOUR DELIVERY COMMITMENT – GUARANTEED SUPPLY SECURITY FOR UNINTERRUPTED SURGICAL PROCEDURES.
- TECHNICAL SUPPORT – FAST RESPONSE TIMES, BACKUP UNITS, AND SPECIALIZED TECHNICAL SUPPORT.
- CUSTOMER SERVICE – CLEAR POINTS OF CONTACT AND TRANSPARENT COMMUNICATION.
- THESE EXPECTATIONS ARE CRUCIAL FOR BEING SELECTED IN BIDS AND FOR ESTABLISHING LONG-TERM SUPPLIER PARTNERSHIPS .
- AND A GOOD PRICE! GERMANY'S ACHILLES' HEEL: PRICE-DRIVEN PROCUREMENT!

TENDERS IN GERMANY

Criteria for Tenders

- Security of supply
- Patient Safety & Quality Cost-
- Effectiveness / Price Legal
- Certainty Innovation Capacity
- Process Analysis Sustainability
-
-

PURCHASING CONSORTIUMS

THE IMPORTANCE OF PURCHASING CONSORTIUMS IN GERMANY

- 90 PERCENT OF ALL HOSPITALS ARE MEMBERS OF A PURCHASING CONSORTIUM
- AS A RESULT, HOSPITALS RARELY PROCURE GOODS AND SERVICES THEMSELVES, BUT RATHER THROUGH THE GPO IN THE FORM OF
- FRAMEWORK AGREEMENTS AND BASIC AGREEMENTS OF THE RESPECTIVE GPO
- GPOs CONSOLIDATE PRICING, STANDARDIZATION, AND COMPLIANCE REQUIREMENTS
- IN DOING SO, DIFFERENT PROCUREMENT STRATEGIES ARE PURSUED (SINGLE-SOURCING, MULTIPLE-SOURCING)
- GPOs Handle Many Service Areas, Such as IT Tools, Interfaces, Tenders, and Consulting
- **ESSENTIAL FOR MARKET ACCESS: LISTING IN GPOs**

PURCHASING COOPERATIVES IN GERMANY

Purchasing Groups in Germany



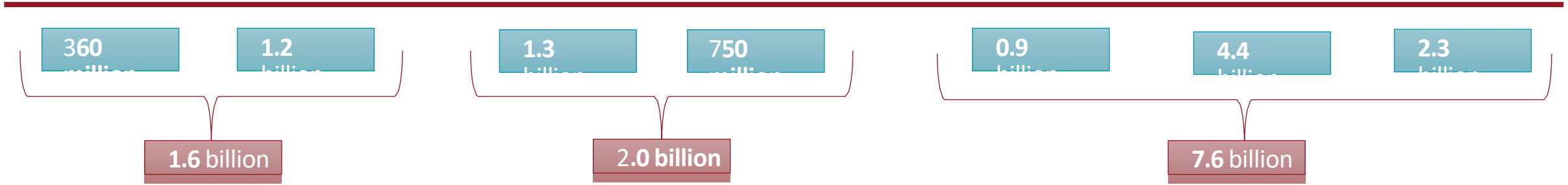
PURCHASING CONSORTIUMS IN GERMANY









↑↓
Partnership / Merger

↑↓
Partnership / Merger

↑↓
Partnership / Merger



PURCHASING COOPERATIVES IN GERMANY

Consortia	Advantages	Disadvantages
 	<ul style="list-style-type: none"> - Expansion of service offerings (sustainability, food, academy, etc.) 	<ul style="list-style-type: none"> - Bargaining power remains virtually unchanged - Heterogeneous membership structure - Not a merger, but a takeover; an EKG loses its identity entirely
 	<ul style="list-style-type: none"> - Significantly increased bargaining power (better prices) 	<ul style="list-style-type: none"> - Lack of acceptance among members (6 out of 13 institutions affiliated with EK-UNICO have withdrawn) - Not a merger, but rather a takeover; the strengths of EKG EK-UNICO are completely lost - No similar structures (finance, bonuses, IT, etc.)
 	<ul style="list-style-type: none"> - Bargaining power is increased (better prices) - Similar structures and processes - Similar membership structure - Common IT strategy - Significant cost savings - Development of a joint service offering possible 	<ul style="list-style-type: none"> - Possible lack of acceptance by members and industry - May give the impression of a takeover

TRADE FAIRS AND CONFERENCES IN GERMANY

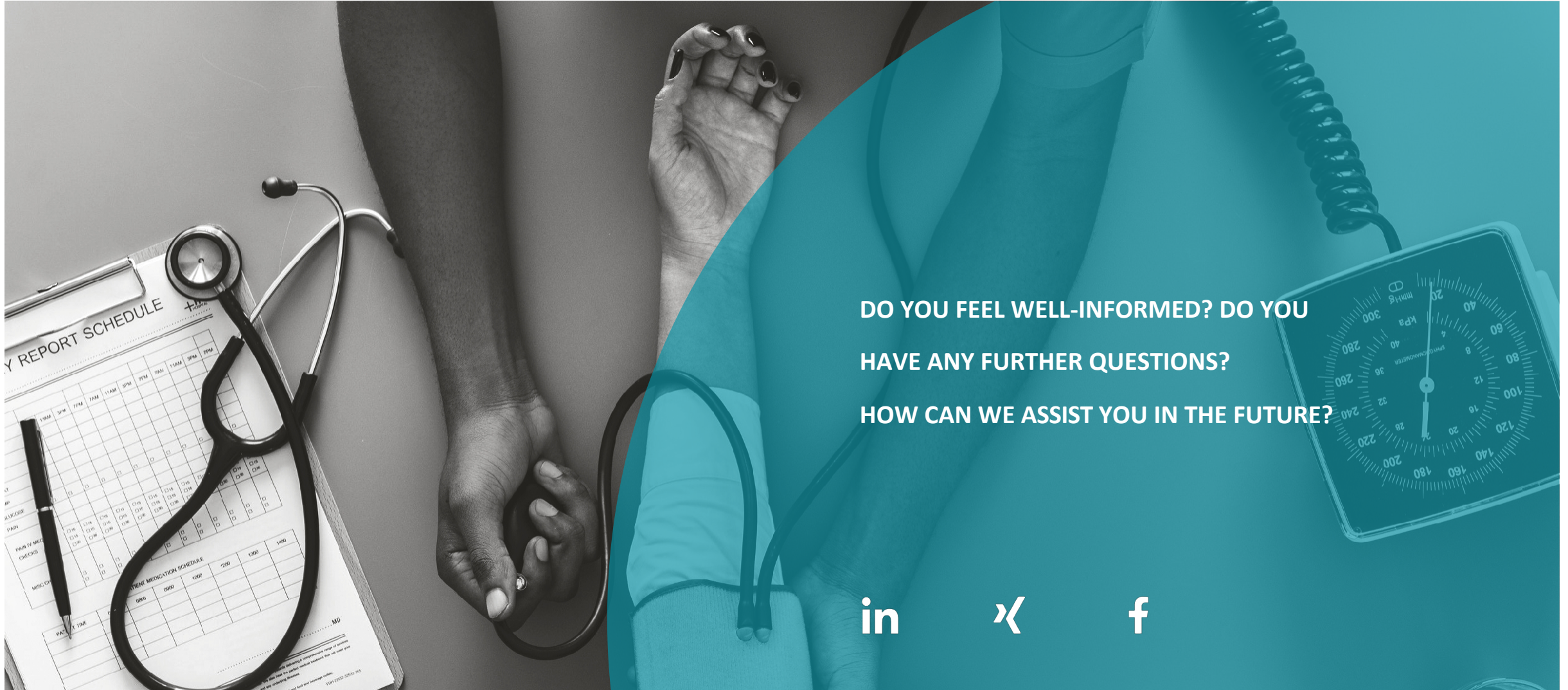
Date	Trade Fair / Convention	Location	Website
February 11–13, 2026	36th Symposium on Intensive Care Medicine and Nursing	Bremen	https://intensivmed.de/
February 23–24, 2026	Better Product & Solutions Congress 2026	Berlin	https://smart4eco.eu/bpsc2026/
March 3–4, 2026	Future of Healthcare 2026 (Hesse Hospital Network)	Wiesbaden	https://www.kongress-zukunftgesundheit.de/
March 16–17, 2026	42nd femak National Conference	Münster	https://femak.de/42-femak-bundesfachtagung-2026-in-muenster/
March 19–20, 2026	DRG FORUM 2026	Berlin	https://drg-forum.de/
March 24–25, 2026	GMP - PharmaCongress	Wiesbaden	https://www.pharma-congress.com/location.html
April 8–11, 2026	92nd DGK Annual Meeting	Mannheim	https://herzmedizin.de/fuer-aerzte-und-fachpersonal/kongresse/dgk-jahrestagung-2026.html
April 21, 22, 23, 2026	DMEA - Connecting Digital Health	Berlin	https://www.dmea.de/de/about/
May 6–8, 2026	DEWU German Wound Congress 2026	Bremen	https://deutscher-wundkongress.de/
May 13–15, 2026	RÖKO 2026	Leipzig	https://roentgenkongress.de/
May 19–20, 2026	Procurement Symposium 2026	Bochum	https://www.vergabesymposium.de/
June 23–25, 2026	Capital City Congress 2026	Berlin	https://www.hauptstadtkongress.de/
June 24–25, 2026	Procurement Summit	Hamburg	https://procurementsummit.de/
June 25–27, 2026	32nd Congress of the German Society for Radiation Oncology	Leipzig	https://www.degro-kongress.org/
September 9–10, 2026	HEALTHCARE ECONOMICS CONGRESS 2026	Hamburg	https://www.gesundheitswirtschaftskongress.de/gwk-2026/
September 17, 2026	ECLASS Annual Congress		https://eclass.eu/aktuelles/termine/eclass-mitgliederversammlung-2026
September 16–19, 2026	78th Congress of the German Society of Urology 2026	Düsseldorf	https://www.urologenportal.de/fileadmin/MDb/Images/Kongress2026/DGU2026_Invitation.pdf
October 20–23, 2026	DKOU 2026	Berlin	https://2026.dkou.org/
November 30–December 1, 2026	16th Hospital Procurement Congress	Berlin	https://www.beschaffungskongress.de/de/15.Beschaffungskongress

SUMMARY (10-POINT PLAN)

TO ESTABLISH A PRESENCE IN GERMANY, A COMPANY MUST:

- ESTABLISH A LOCAL LEGAL ENTITY
- MEET ALL REGULATORY AND OPERATIONAL REQUIREMENTS AND
- DEMONSTRATE A LONG-TERM COMMITMENT.
- THIS INCLUDES ESTABLISHING A LOCAL (SALES) ORGANIZATION
- PREFERABLY: MAINTAINING GERMAN WAREHOUSE AND SERVICE CAPACITIES AS WELL AS
- A STABLE NETWORK OF MANAGERS, USERS, AND PURCHASING MANAGERS, AND
- ACCESS TO AS MANY GPOs AND THEIR DECISION-MAKERS AS POSSIBLE
- THE IMPLEMENTATION OF A STRONG BRAND AND MARKET ACTIVATION STRATEGY
- PRESENCE AT TRADE SHOWS AND CONFERENCES, SOCIAL MEDIA (LINKEDIN, ETC.)
- A WIDE RANGE OF TRAINING AND EDUCATION FOR OUR PRODUCTS
- CONTACT WITH CONSULTING FIRMS FOR TENDERS AND MARKET ACCESS

THANK YOU



DO YOU FEEL WELL-INFORMED? DO YOU
HAVE ANY FURTHER QUESTIONS?
HOW CAN WE ASSIST YOU IN THE FUTURE?

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