Germany is Europe’s largest medical technology market and ranks third internationally. With more than 1,200 medical device manufacturers (>20 employees) and two thirds of revenues generated outside its domestic market, Germany is also home to a very successful medical technology industry. Throughout the world, products “Made in Germany” have achieved an excellent reputation for their leadership in quality, innovation, and design. The foundation of this success is a well-established collaboration between private sector companies, hospitals, contract research institutions, and academia.

Germany is home to more than 30 specialized cluster networks focusing on medical technology. Their goal is to achieve continuous innovation in research and development as well as in manufacturing by connecting companies, hospitals, universities, and other research institutions. Dedicated cluster management teams help obtain funding for joint R&D projects, provide shared facilities, and organize educational training programs for their members. Working closely with local cluster experts, Germany Trade and Invest (GTAI) can support international companies by identifying and contacting key clinical opinion leaders. Moreover, matching partners and service providers can be found to assist with product certification, reimbursement procedures, and product development.

This publication provides a countrywide overview of selected clusters and networks recognized by the national “go-cluster” excellence program in accordance with the guidelines of the European Cluster Excellence Initiative (ECEI). Interested companies are welcome to join one or more clusters regardless of geographic location.

→ GTA I assists international companies in setting up business operations – such as R&D centers, manufacturing facilities, and sales and service centers – in Germany. For further information and contact details please visit us online at: www.gtai.com/medtech

**Market Drivers**

**New Materials**

New alloys and bio-based materials for implants, pharmaceuticals and medical devices.

**Care Dependency**

Demand for care is set to rise from 3.5 million people in 2017 to more than 4 million by 2030.

**Digitalization**

Digitalization and secure exchange of data is leading to higher quality of medical care at lower cost.

**Aging Society**

By 2035, some 24 million people will be 65 years or older (31 percent of the population).

**Chronic Diseases**

Chronic diseases account for 80 percent of German healthcare spending (EUR 200 billion).

**New Production**

Additive manufacturing and novel production methods allow for higher efficiencies and quality.
Germany’s medical technology cluster activities are promoted by the Federal Ministry for Economic Affairs and Energy and the Federal Ministry of Education and Research. The individual cluster research activities are supported by a number of funding instruments, many of which focus on partnering projects also open to international companies.

**Digital Transformation**

Industry realignment and change is helping propel digitalization in the New Health sector, as advanced technologies are used to provide new and improved methods of medical care. The network effects created by clusters support a holistic approach to healthcare provision that facilitates increased and more effective knowledge transfer between the various stakeholders in the health economy.

**Digital Hub Initiative**

The Digital Hub Initiative, developed by the Federal Ministry for Economic Affairs and Energy, seeks to support the establishment of digital hubs in Germany. The underlying idea of establishing 12 digital hubs across the country is that cooperation between companies and business start-ups within a confined area will boost innovation in the digital age.

Digital Hub – Mannheim/Ludwigshafen

Internationally leading companies, innovative start-ups and globally renowned research institutions from the chemical and healthcare sectors have made their home between the Rhine and Neckar rivers. The hub seeks to drive innovation and start-up growth – thereby accelerating the development of new business models and market-ready solutions – by providing a platform for knowledge transfer, networking and partnership.

Digital Hub – Nuremberg/Erlangen

The Nuremberg/Erlangen metropolitan region is home a vibrant healthcare economy complemented by excellent research institutions. Building on this existing infrastructure, the Digital Health Hub represents a successful ecosystem of actors whose joint aim is continual improvement of healthcare quality and healthcare market growth through digitalization measures. Particular focus of activities is placed in the fields of big data, artificial intelligence, and the Internet of Things. Within the hub, the Medical Valley EMN cluster pools the resources of business, science, healthcare, and politics to promote synergies for the development and marketing of market-effective solutions for the global marketplace.

Germany’s technology clusters provide benefits along the entire value chain

![Diagram of technology clusters](image-url)
Medical technology clusters can be found the length-and breadth of the country – providing a network platform for world-class partnership opportunities and cross-industry innovation activity. Together, companies, hospitals, universities, universities and other medical healthcare stakeholders are working together to drive medical technology forward; turning research results into new medical products that benefit patients across the globe.

**BioConValley**
www.bioconvalley.org

**Selected Area of Activity**
- Healthcare (incl. rehabilitation etc.)
- Medtech
- E-Health
- Plasma medicine
- Cardiology
- Diabetes
- Orthopedics
- Implantology
- Hygiene

**Selected Members**
- Companies: 70
- Universities: 5
- Research Institutes: 12

**Life Science Nord**
www.lifesciencenord.de

**Selected Area of Activity**
- Medical imaging
- Minimal invasive technologies
- Implantology
- Bone healing
- Hygiene & Infection
- E-Health

**Selected Members**
- Companies: 500
- University Hospitals: 2
- Universities: 8
- Research Institutes: 14

**Auditory Valley Oldenburg**
www.auditory-valley.com

**Selected Area of Activity**
- Audiological diagnostics
- Technical hearing aids
- Implant development
- Assistive technology
- Audio signal processing
- Cognition and acoustics

**Selected Members**
- Companies: 10
- Hospitals: 2
- Universities: 2
- Research Institutes: 12

**HealthCapital Berlin Brandenburg**
www.healthcapital.de

**Selected Area of Activity**
- Medical imaging
- Minimally invasive medicine
- Cardiology
- Endoprosthetics
- Digital Health

**Selected Members**
- Companies: 335+
- University Hospitals: 2
- Universities: 31
- Research Institutes (Life Sciences): 24

**medways e.V.**
www.medways.eu

**Selected Area of Activity**
- Ophthalmology
- Implants and endoprostheses
- Optical and biotechnological diagnostic tools
- Sensors
- Regulatory Affairs
- Quality Management
- MDR/IVDR

**Selected Members**
- Companies: 47
- University Hospitals: 1
- Universities: 3
- Research Institutes: 10
- Other: 19

**biosaxony**
www.biosaxony.com

**Selected Area of Activity**
- Medical devices
- Radiation oncology
- Medical imaging and software
- Medical engineering
- Point-of-care diagnosis

**Selected Members**
- Companies: 200+
- University Hospitals: 2
- Universities: 9
- Research Institutes: 14

**Auditory Valley Oldenburg**
www.auditory-valley.com

**Selected Area of Activity**
- Medical imaging
- Minimal invasive techniques
- Implantology
- Bone healing
- Hygiene & Infection
- E-Health

**Selected Members**
- Companies: 500
- University Hospitals: 2
- Universities: 8
- Research Institutes: 14

**Medical Valley EMN e.V.**
www.medical-valley-emn.de

**Selected Area of Activity**
- Medical devices
- Diagnostic imaging
- Telemedicine
- mHealth
- Healthcare IT

**Selected Members**
- Companies: 500+
- University Hospitals: 2
- Universities: 8
- Research Institutes: 21
BIOPRO Baden-Württemberg
www.bio-pro.de

Selected Area of Activity
- Minimally invasive endoscopes
- Implants, prostheses
- Robotic systems
- Diagnostics (focus on personalized medicine)
- E-Health

Selected Members
- Companies: 850
- University Hospitals: 6
- Universities: 19
- Research Institutes: 10

MedicalMountains GmbH
www.medicalmountains.de

Selected Area of Activity
- High quality surgical instruments
- Minimally invasive surgery
- Innovative implant technology

Selected Members
- Companies: approx. 400
- University Hospitals: 5
- Universities: 11
- Research Institutes: 24

Forum MedTech Pharma e.V.
www.medtech-pharma.de

Selected Area of Activity
- Medical devices
- Health care
- Pharma & Diagnostics
- Manufacturing
- Robotics & Artificial Intelligence

Selected Members
- Companies: 464
- University Hospitals: 52
- Universities: 29
- Research Institutes: 18

Source: Germany Trade & Invest 2019
Financial Support

Financial support is provided by the European Union (EU), the German federal government, and the individual German federal states. Research and development incentive programs primarily provide funds for personnel costs associated with R&D projects. Additional costs for instruments and equipment may also be eligible if they are clearly used for the relevant R&D project.

R&D Incentives in Europe
The EU’s Horizon 2020 program offers financial support to transnational research and innovation projects at the European level. Support is allocated in the form of grants covering up to 100 percent of project expenditure. Horizon 2020 is the world’s largest research-funding program, with a total budget of more than EUR 77 billion, and will run until 2020.

R&D Incentives in Germany
A number of national programs exist at the federal level. Some of these programs are limited to specific research topics and individual calls for projects while others are open to all research fields. The Central Innovation Program for SMEs (ZIM) is the best known federal program and is designed to reimburse the cost of joint R&D projects led by SMEs. Grants of up to 55 percent of a maximum sum of EUR 385,000 in eligible expenses per project and partner can be awarded. The 16 German states also offer their own R&D support programs. While some of these initiatives focus on specific cluster subjects, open technology programs are more common.

European and German go-cluster Cluster Platform
The European Cluster Excellence Initiative (ECEI) was launched by the EU Commission in 2009 as part of the European Union’s efforts to foster growth and creation of world-class clusters across the EU. The European Secretariat for Cluster Analysis (ESCA) was subsequently established in order to offer practical advice to Europe’s cluster management organizations. Today, ESCA is a network of cluster experts from more than 30 countries that consults cluster policy makers and promotes cluster management excellence through benchmarking and quality labelling of clusters and their management organizations. In Germany, 10 cluster networks with activities in the medical technology sector have already been ECEI certified.

Cluster Platform and go-cluster Excellence Program
The Federal Ministry for Economic Affairs and Energy launched its go-cluster excellence program integrating the country’s strongest cluster management organizations. While clusters included in the go-cluster program are vanguards of innovation, the purpose of the program is to increase their international visibility and the implementation of innovative services. Accordingly, go-cluster offers specific services to its individual target groups: cluster managers, cluster players and representatives from government, science and business. At the time of publication, 22 German cluster networks with activities in the medical technology sector have been awarded go-cluster status.

Health – Made in Germany
The “Health – Made in Germany” export initiative is the first address for international partners looking to discover how they can gain access to and benefit from Germany’s longstanding commitment to innovation, quality and reliability in health care. The Federal Ministry for Economic Affairs and Energy (BMWi) initiative bundles key information and provides vital business contacts for new and fruitful cooperation.

→ www.health-made-in-germany.com

R&D Grant Programs

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→ www.health-made-in-germany.com
About Us

Germany Trade & Invest (GTAI) is the foreign trade and inward investment agency of the Federal Republic of Germany. The organization advises and supports foreign companies planning to expand into the German market and assists German companies seeking to enter foreign markets.

Investment Location Germany

GTAI provides close-to-market information to international companies looking to enter German markets. Our specialist industry teams prepare all of the relevant information essential to business success in Germany. GTAIs comprehensive range of information services includes:

- Market and industry reports
- Market entry analyses
- Business and tax law information
- Business and labor law information
- Funding and financing information

Business Location Services

GTAI supports international companies from market entry to business start-up in Germany. Expert project teams advise and assist in the business establishment phase. GTAIs range of free services includes:

- Legal and tax-related project support
- Funding and financing advisory services
- Site visit organization
- Local partner and network matchmaking
- Public and private partner coordination

All investment-related services are provided entirely free of charge. Our specialist industry teams have hands-on experience in their respective industries and treat all investor enquiries with the utmost confidentiality.

Imprint

Publisher
Germany Trade and Invest
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Print
Kern GmbH, 66450 Bexbach
www.kerndruck.de

Picture Credits
©BVMed – Bilderpool
Map of Germany: fotolia

Order Number
20854

Notes
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