MITTELSTAND
GLOBAL
HEALTH MADE
IN GERMANY

GTAI GERMANY
TRADE & INVEST

The Digital Health Sector

Summary

The Covid-19 pandemic has resulted in enormous disruptions within health care. The traditional face-to-face patient-physician care model has had to be re-examined, with digital technology and new models of care being rapidly deployed to meet the various challenges of the pandemic. It has acted as an accelerator to almost all digital business models, including digital health technologies.
Germany's pharmaceutical, biotechnology, medical technology, and information technology sectors are renowned for their innovativeness. German firms are pioneers in the creation of new digital health solutions combining traditional healthcare sector knowledge with cutting-edge technology.

Germany is one of the countries with the biggest number of medical technology suppliers and constitutes the major European pharmaceutical market. All of this has led to the creation of a vibrant digital health start-up ecosystem across the country – offering new IT-based health products for many and varied use cases. The industry also benefits from exceptional research facilities in the health and IT disciplines, high-quality healthcare infrastructure with internationally acclaimed hospitals, and rigorous data protection standards. Together, these factors drive digital health innovations, allowing Germany's health sector to react quickly – even to extraordinary situations.

EUR 169.8 bn
turnover generated by the German ICT industry

EUR 3.5
mobile health market size in Germany

EUR 127.7 bn
German health-related business export volume

EUR 34.0 bn
global mobile health revenues[1]

[1]all data from 2020

Market Data

Over the last decade, digitalization has been shaping more and more aspects of life and now drives almost all industries. This also holds true for health-related businesses and patient care. The digital health market is expected to grow globally to a market share of 12 percent by 2025. This is equivalent to a market size of EUR 979 billion, of which EUR 57 billion is accounted for by Germany. According to the consultancy firm Roland Berger, Covid-19 is part of th e reason for this growth, as the pandemic is accelerating digital health provision. Moreover, the growing mobile health market is one of the main contributors to this trend.

In 2020, the global mHealth market size was EUR 35 billion. Analysts from the Grand View Research Consultancy expect this number to grow at a compound annual growth rate (CAGR) of 17.7 percent for the period 2021 to 2028. In Germany, market size reached EUR 3.5 billion in 2020 and is expected to grow at over 30 percent (CAGR) from 2021 to 2030. Experts believe that patients will progressively own their health data, deciding who they grant access to.

Germany's digital health activities benefit from a number of favorable conditions. First, there is a strong domestic mobile health market which provides digital health companies with an attractive foundation for further growth. Second, digital health "Made in Germany" is based largely on the country's leadership in the global healthcare industry: whether in the pharmaceutical, biotechnology or medical technology sectors. Total export volumes for German health-related businesses was EUR 127.7 billion in 2020. The necessary expertise is provided by 7.4 million employees currently working in the German healthcare industry. Third, Germany is home to a strong technology sector. With annual sales revenue of more than EUR 169.8 billion, the

German Health Industry Export Volumes
in EUR billion
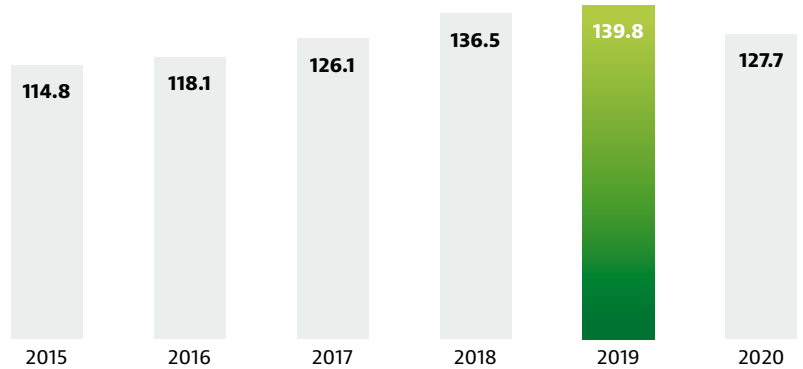
Source: Federal Ministry for Economic Affairs and Energy (2021)

domestic IT, telecommunications and consumer electronics sector is a major pillar of the German economy. Healthcare has established itself as an attractive growth area for German IT companies. These companies increasingly provide solutions for connected services, adapted infrastructures, medical devices, and digital health products. This development is facilitated by vibrant Internet of Things (IoT) clusters established in and around Berlin, Hamburg, Munich, and Cologne that connect IT start-ups with the healthcare industry.

Thanks to these excellent conditions, a diverse digital health environment has formed in Germany. Driven by regional governments, companies and clinics, more than a dozen accelerators and local hubs support the foundation of new start-ups (see page 9). In addition, a substantial number of companies – large, small and medium-sized enterprises – already offer a broad portfolio of IT-based health products. Their services range from video-based doctor consultations and medical records for the smartphone to diagnostic and therapeutic apps for doctors and patients as well as preventive services supporting a healthy lifestyle.

For example, fitness trackers generated revenue of around EUR 4.1 billion in Germany in 2020. Growing digitalization also impacts data storage infrastructures and communication processes across the healthcare sector. Here German companies are helping to develop more efficient data routes in hospitals, location sites, attending physicians, care and rehabilitation facilities, patients' homes, and health insurance companies.

Mobile Health Turnover in Germany
in EUR billion

Source: Global Market Insights (2021)

Industry Trends

Strong mHealth and Quantified Self Demand

Digital health solutions offered as mobile apps or for mobile devices are in high demand due to different factors. One factor is the growing number of smartphone and tablet users. Because an increasing number of individuals utilize handheld devices, mHealth will continue to drive the eHealth business forward. In 2020 there were 60.7 million smartphone users and 31.8 million tablet users in Germany. Many of those had more than one cell phone contract. This number is constantly rising, as is the internet penetration rate which was 86.7 percent in the same year. The term "eHealth" is also becoming more commonplace, with 86 percent of the population being familiar with the term. Smartwatches are the most commonly used gadgets for health purposes.

There are currently 110,000 medical applications available in app stores (Google Play, Apple and Amazon) worldwide. Of the leading global mHealth apps available in 2020, some 34 percent were made by companies based in Europe. The mHealth market offers diverse solutions covering everything from chronic tinnitus therapy and depression self-help to diabetes management apps. At the time of writing, there were 19 healthcare apps available for prescription in the German DiGA registry (Digital health applications). Most of these products support tracking, recording, analyzing, controlling and evaluating personal health-related data in everyday activities. This demonstrates the high potential for mobile health in the preventive area.
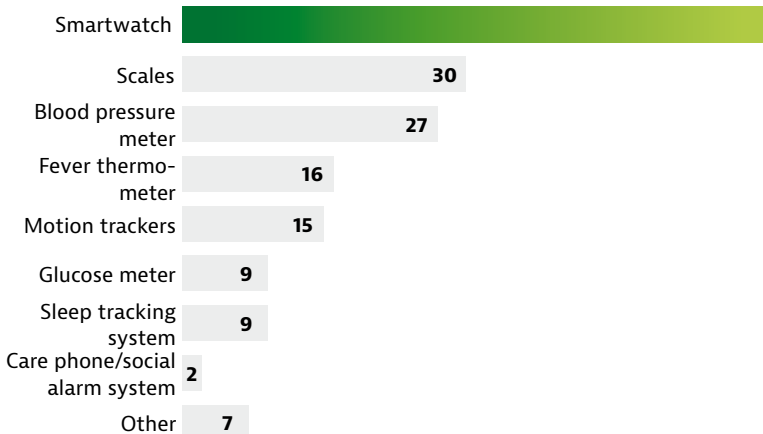
Healthcare Providers Are Becoming Smarter

The disruptive nature of digital health innovation is dramatically changing the structure of traditional health systems worldwide. Today, patients not only increasingly monitor their own health but also use online platforms to obtain information – enabling them to make more independent decisions than ever before. One of the most significant achievements in the digital transformation of the German healthcare system is the electronic patient health record (ePA) finally becoming a reality in 2021 after 16 years of planning. Patients are now able to obtain all of their personal health data within the German healthcare system, with extensive digital connection between patients and service providers being enabled by the development.

According to researchers from the magazine "E-HEALTH-COM", 94 percent of German healthcare companies are currently in the process of or planning to digitalize their internal processes and procedures in the next two years. 75 percent of hospitals and out-patient care chains are prioritizing the improvement of patient care by establishing platforms, portals and prescribing healthcare applications. This is reflected in 76 percent of practitioners having digitalized most patient documentation, 79 percent have medical equipment with integrated digital interfaces, and 24 percent use devices for remote diagnostic purposes.

Another promising advance is the "Digital Care and Care Modernization Act" (DVPMG), which has been in effect since June 2021. This law aims to further promote telemedicine, ensure data security, update telematics infrastructure and to simplify the prescription of care apps. Furthermore, a new procedure will be created for reviewing the possibility of reimbursement of expenses for digital care applications. The DVPMG roadmap also makes provision for digital IDs for insured individuals and service providers in 2023. This will allow digital ID holders to verify their identity securely for video consultation and digital health app purposes. The electronic health card will be able to be read in contactless fashion by service providers by 2023, with all insured parties having the opportunity to share their accurate and secure health data with clinicians in other EU countries.

Most Frequently Used Smart Health Devices in Germany
in percent

Device	Percent
Smartwatch	
Scales	30
Blood pressure meter	27
Fever thermo-meter	16
Motion trackers	15
Glucose meter	9
Sleep tracking system	9
Care phone/social alarm system	2
Other	7

Source: eHealth Report Statista (2020)

Global Funding Continues to Rise

In 2019, total health expenditure in Germany was EUR 410 billion. This represents 11 percent of Germany's GDP and has increased almost five percent (CAGR) for the period 2000 to 2019. One of the most important initiatives in 2020 was the Hospitals Future Act (KHZG). This supports the digital transformation and modernization of German hospitals with a total of EUR 4.3 billion, focusing primarily on the need for digital infrastructure, data privacy standards and the reduction of bureaucratic requirements.

Start-ups operating in the IT and health fields are increasingly attractive to the private capital market and several digital health-focused venture capital funds have recently been announced. For instance, early-stage start-ups will receive EUR 53 million from DVH ventures, while commercial health insurers plan to create a EUR 88 million fund for digital health investments. Internationally, digital health funding secured EUR 12.4 billion – with a total of 637 deals – in 2020. Major investment areas include treatment of diseases, on-demand healthcare, research and development, mental health, consumer information, and non-clinical workflows.

Telemedicine Becoming More Common

The continuing Covid-19 epidemic has sparked a digital health adoption and innovation revolution. This is mostly due to the surge in demand for alternatives to in-person care that has occurred since early 2020. Telemedical devices connecting in-patient and out-patient sectors as well as home care are another digital health trend. German researchers, hospitals and companies have developed a number of telemedicine platforms – such as monitoring patients with cardiac pacemakers and digital home care services as a follow-up to clinical rehabilitation in orthopedic indications – for specialized use cases.

Public approval of the use of digital technology in remote healthcare provision has skyrocketed in recent months. According to a McKinsey survey, around two thirds of Germans are more receptive to telemedicine now than they were before the pandemic crisis. The telemedicine offer grew rapidly, so that 52 percent of all doctors in private practice had already started offering video consultation hours by May 2020.
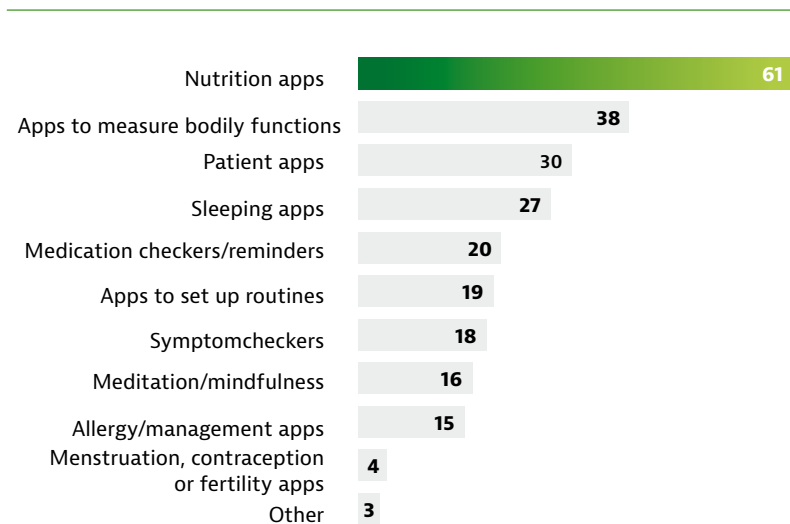
The German telemedicine portal initiated by the German Federal Ministry of Health provides an overview of ongoing telemedicine projects in Germany and has listed around 200 projects to date.

Artificial Intelligence and Smart Sensors

Companies from engineering and information technology fields sell and distribute new software tools, smart sensors for implants, cloud computing technologies, blockchain systems, and wearables. This technology might be utilized in population health management to meet the requirements of the elderly and, in the long term, to cover the nursing staffing shortage.

Experts forecast that AI and deep learning algorithms, for instance, will improve treatment outcomes at lower costs. First applications from German companies with deep imaging – which turns medical images into biomarkers – demonstrate that doctors' decisions could be strongly supported with integrated imaging information to implement more precise therapies for patients with cancer or skin diseases. Other German enterprises focus on using AI-based strategies in R&D processes, drug research and simplifying diagnostic methods. According to the German Health IT Association (bvitg), doctors consider AI to be extremely important or absolutely vital – with 56 percent planning to adopt one to ten AI applications in the near future.

German Preferences for eHealth Apps
in percent

Category	Percent
Nutrition apps	61
Apps to measure bodily functions	38
Patient apps	30
Sleeping apps	27
Medication checkers/reminders	20
Apps to set up routines	19
Symptomcheckers	18
Meditation/mindfulness	16
Allergy/management apps	15
Menstruation, contraception or fertility apps	4
Other	3

Source: eHealth Report Statista (2020)

Sector Structure

The German digital health sector makes use of the broad foundation of healthcare expertise available in the country. Companies from different industries offering a diverse portfolio of digital health solutions are active in the market. Some of these businesses are specialists in niche areas that recognize digital health may help speed up product development by enabling digital clinical trials and expanding the healthcare applications value chain. The digital health market offers plenty of activity areas along the healthcare value chain. These include, but are not strictly limited to, the areas listed below.

PHARMACEUTICAL SECTOR

The pharmaceutical industry is the largest sector within the German healthcare industry. This publication highlights its strengths and international partnership opportunities.

- *Preventive medicine*: Digital diagnostic services will fundamentally change disease prevention. A number of German companies, mainly with an IT background, offer solutions for monitoring physiological data as a form of advanced wellbeing in fitness, wellness and healthy nutrition contexts. There are a number of very innovative solutions on the German market, such as smart clothes, shoes, yoga pants, and socks to monitor or track metrics and improve performances.

  Wearables represent the largest market segment in the fitness area, with annual revenue of EUR 375 million in 2019. Germany's strong medical biotechnology sector also provides a rapidly growing toolbox of digital health services based on modern molecular biology and microbiome research. This enables researchers, clinicians and patients to identify the causes of many diseases – such as inflammatory diseases, cardiovascular diseases and gastroenterology – before symptoms are recognized.

MEDICAL BIOTECHNOLOGY

Medical Biotechnology is one of the most innovative healthcare fields in Germany. This publication provides an industry overview.

- *Diagnostics and therapeutic treatments:* Digital solutions have advanced modern medicine so that personalized treatments such as individual dose volumes, time schedules and reminders can easily be implemented. Moreover, digital tools support patient empowerment and maintenance of treatment and are therefore ensuring efficient therapies – this is of particular relevance for patients with chronic diseases including cardiovascular diseases, chronic respiratory illnesses, and diabetes.

  Other devices help establish remote monitoring of respiratory diseases, patients at risk of stroke, and cardiac arrhythmia. There are currently 2.2 million users in the hypertension segment market. Overall, revenues of eHealth heart-failure products amounted to EUR 32 million in 2019 and are expected to record a CAGR of seven percent by 2022 in Germany. These devices are used to analyze, assess, store and transmit health data, with the information generated shared with physicians. Solutions also include tools that help patients to monitor their blood pressure or maintain a diabetes diary by automatically storing insulin units and blood glucose readings. The revenue for eHealth diabetes solutions in Germany was EUR 20 million in 2019. User numbers are expected to reach a total of 400,000 by 2022.

- *Rehabilitation and patient care:* In the hospital rehabilitation setting, physiotherapists commonly treat patients who have had amputations, spinal cord injuries, strokes, traumatic brain lesions, and other debilitating injuries. For these indications, robot-assisted wearable sys-

tems that are connected to other digital mobile devices pave the way for innovative gait training.

Some companies in Germany have a particular focus on this area. Thanks to the high-quality standards that prevail within rehabilitation centers, these sites are frequently chosen for a first-of-its-kind use. Digital health products also improve homecare which is becoming increasingly important in out-patient care. They assist elderly people, for instance, in their everyday life at home by preventing falls or supporting communication in emergency situations. In 2020, more than 230,000 German households were equipped with Ambient Assisted Living functionalities (AAL) including pressure mats, emergency buttons and services.

· *Health IT infrastructure and data handling:* The sheer quantity of data accumulated in healthcare systems means that efficient medical information systems – as well as data storage and data-sharing interfaces – are imperative for effective treatment decisions and doctor-patient communication in in-patient and out-patient care scenarios. In a survey conducted by Statista in 2021, health professionals name the most important eHealth priorities at the moment as being IT security, data privacy and the adoption of medical records. According to a bvitg report, the medical industry ranked as the seventh sector most targeted by cybercriminals.

Digital Healthcare Act
In December 2019, the German parliament passed legislation authorizing the prescription of digital medical applications and facilitating video consultations to support the detection and treatment of diseases. The Digital Healthcare Act (DVG) drives the digitalization of Germany's healthcare system, including the coverage of costs of standard software as well as mobile and browser-based apps made available by private and public health insurance funds. To be eligible, medical app solutions must be approved and listed in the DiGA registry by the German Federal Institute for Drugs and Medical Devices (BfArM). This is to ensure their safety, quality, security, and functionality.

Digital Healthcare Act:
· Allowing easy patient access to healthcare applications
· Driving innovation in the German healthcare system
· Making a digital network for the health sector obligatory
· Increasing acceptance of online video consultations
· Improving research findings in the field of health services
· Strengthening interconnectivity of the healthcare industry

Digital Health Activity Areas

EUR 375m

Preventive Medicine
Wearables is the largest segment, with annual revenue of EUR 375 million in 2019

Diagnostics and Therapeutic Treatments
eHealth Heart Failure Products: EUR 32 million revenue in 2019
eHealth Diabetes Solutions: EUR 20 million revenue in 2019

| eHealth Heart Failure Products | EUR 32m |
| eHealth Diabetes Solutions | EUR 20m |

7th

Health IT Infrastructure
The medical industry: 7th most targeted by cybercriminals

230,000+

Rehabilitation and Patient Care
230,000+ German households with AAL functionalities

The Digital Health Landscape in Germany

High-quality Healthcare Infrastructure

Germany's export-oriented health industry profits from a strong, innovation-driven home base with a high-quality healthcare system. It provides a unique infrastructure for implementing and exporting digital health solutions. The country is one of the world leaders when it comes to offering the best possible in-patient and out-patient care. Every year, Germany's 1,914 hospitals – and their 910,000 full time employees – take care of around 19.4 million patients. There are 1,112 rehabilitation facilities as well as 15,400 nursing homes and a further 14,700 nursing services in Germany. The annual costs for in-patient treatment in German hospitals increased by 5.7 percent to approximately EUR 98.8 billion in 2019. The majority of hospital costs are spent on medical services, nursing services, pharmaceuticals, special services, and therapeutic services, with cardiovascular diseases being the source of the highest costs. In 2018 alone, around 45,000 heart bypass surgeries were conducted. Moreover, the German statutory health insurance funded EUR 125.6 billion costs for hospital and medical treatments – accounting for almost 50 percent of the entire spending in 2019.

German Statutory Health Insurance Funding by Service Categories
in EUR billion

	2016	2018	2020
Hospital treatment	72.9	77.1	81.5
Medical treatment	36.5	39.4	44.1
Treatment care and nursing homes	5.7	6.4	7.3
Provision and rehabilitation services	2.6	2.8	3.1

Source: Federal Ministry of Health (2021)

R&D Excellence

Germany's clinical infrastructure is embedded in strong R&D and industry networks throughout the country. Since the late 1990s, a number of regions have become established as Europe's leading health clusters and R&D hubs – paving the way for interdisciplinary collaboration between research institutes, universities, hospitals, and companies from the pharmaceutical, biotechnology and medical technology sectors. Many of these clusters and hubs have laid the foundations for subsequent digital health accelerators and hubs – with particularly strong activities in Berlin and Munich (see map on page 9). The Digital Hub Initiative, launched by the Federal Ministry for Economic Affairs and Climate Action, promotes cooperation between companies and business start-ups within a geographical region. Of the 12 digital hubs financed by the initiative, two hubs have a specific healthcare sector focus. They are located in Nuremberg/Erlangen and Mannheim/Ludwigshafen.

www.de-hub.de/en

Significant R&D spending in the German healthcare industry also highlights the major role of innovation in the sector. Total R&D spending by the pharmaceutical industry reached EUR 7.8 billion in 2019 – equivalent to approximately 17.1 percent of industry revenue. Within the medical technology sector, nine percent of annual turnover is invested in R&D, with 15 percent of employees in the sector working in the R&D field. German biotech company R&D investment reached EUR 2.5 billion in 2020 – some 37 percent more than in the previous year. Since 2000, there have been rapid increases in bio-IT solutions and services. Improved analysis tools for big data have fueled the progress made in molecular biology. A growing number of German companies have established their expertise in this field.

Germany also promotes the improvement of data exchange between different hospital sites and biomedical research institutes. The German Federal Ministry of Education and Research provided funding of EUR 150 million for the establishment of data integration centers at German university hospitals for the period 2017 to 2021. Germany enjoys high levels of data protection thanks to the National Data Protection Law (Bundesdatenschutzgesetz – BDSG).

All recorded health data is given special protection. Stakeholders dealing with electronic medical records must comply with these exacting standards. They are also well prepared to adapt to the new European General Data Protection Regulation (GDPR) which came into effect in May 2018. German digital health experts in science and business

have extensive knowledge in setting up safe digital data exchange infrastructures based on high-level protection standards. Several hospitals sites in Germany are leaders in implementing these solutions together with the health IT industry.

Gateway to German Start-ups

Most German digital health companies have a global strategic perspective and look for cooperation partners in international markets. This is not only true for large corporations in the traditional healthcare industry, but also for smaller businesses. For German digital health start-ups looking to move into the US market, the German Accelerator IT and the German Accelerator Life Sciences offer well-established structures financed by the German Federal Ministry for Economic Affairs and Climate Action. Companies taking part in those programs benefit from mentoring workshops, US office workspace provision and contact assistance with VC investors and possible clients in the USA. US-based health companies can make use of this infrastructure to establish contact with German start-ups. Germany has around 75 hubs, with many of them providing specific support for digital health start-ups.

Digital Health Activities in German Clusters, Networks, Hubs and Accelerators

Source: CONOSCOPE GmbH (2021)

Health Hubs & Accelerators

1. Health-i Initiative of Techniker Krankenkasse
2. Philips Health Innovation Port
3. Healthy Hub, Hanseatische Krankenkasse
4. Healthcubator
5. Grant4Apps Program of Bayer AG
6. Startupbootcamp
7. Flying Health Incubator
8. Pfizer Healthcare Hub
9. German Accelerator Life Sciences/IT
14. Digital Hub Initiative Nürnberg/Erlangen
15. German Accelerator Life Sciences/IT
16. Healthy hub, Siemens Betriebskrankenkasse
17. Digital Hub Initiative Ludwigshafen/Mannheim
21. Healthy hub, mhPlus Krankenkasse
22. Merck Accelerator
23. Digital Lab "BI X"
24. Healthy hub, IKK Südwest
26. I/E-Health NRW
27. Healthy hub, BIG direkt
28. XLHEALTH
29. EIT Digital
30. EyeFocus Accelerator
31. Batch Zero Accelerator, Roche
32. DvH Ventures
33. Health Innovation Hub (hih)

Non-Health speficic Hubs & Accelerators

10. Axel Springer Plug and Play Accelerator GmbH
11. TechFounders
18. hubraum – Tech Incubator of Deutsche Telekom
19. Techcode
20. Microsoft Ventures Accelerator

Clinical Infrastructures Supporting Start-ups

12. Helios.hub
13. Digital Health Accelerator, BIH
25. Digital Hub Aachen/mHealth Division, RWTH Aachen

German Expertise

German digital health companies offer a diverse portfolio of high-quality IT-based products for national and international clients. Foreign markets appreciate the innovative technologies, high data-protection standards and professionalism of German health IT companies. International business strategies play an important role for both large corporations and SMEs active in the digital health sector.

Here, leading representatives of three German health IT companies report on what makes their expertise so interesting for international partners, why global alliances and strategic partnerships are the key to successful business development and what they have learned from the corona pandemic.

CompuGroup Medical is one of the world's leading e-health companies. The company's software products serve a safer and more efficient healthcare system. The basis of CompuGroup Medical's services is its unique customer base of more than 1.6 million users – including physicians, dentists, pharmacies and other healthcare professionals – in outpatient and inpatient settings. CompuGroup Medical has a workforce of more than 8,500 employees and is located in 18 countries with operations in 56 countries.

Ada Health GmbH has been working since 2016 to improve healthcare. Ada's artificial intelligence solution helps a user base of over 10 million people worldwide. Ada partners with leading healthcare systems and NGOs to realize its vision of personalized healthcare for all. The Ada app is the number one medical app in over 130 countries and has completed more than 10 million symptom analyses to date.

T-Systems is a leading provider of digital services with annual revenue of EUR 4.2 billion and a workforce of 28,000 employees in 2020. The Deutsche Telekom subsidary is headquartered in Germany with presences in Europe as well as in selected core markets and strategic production locations. T-Systems provides global production and supply chain solutions to companies operating worldwide

Bernhard Calmer
Managing Director, CompuGroup Medical SE & Co. KGaA, Koblenz

What distinguishes digital health "made in Germany" in international comparison?
Germany is the third-biggest market for medical technologies in the world. And it will continue to be a growth market. Meanwhile, medtech will go digital – not only devices but processes and data storage. The German government is driving the digital transformation of our healthcare system with various initiatives.

What can international partners expect from collaborating with CompuGroup Medical?
Since 1987, today's CompuGroup Medical has been working towards the vision of a digital healthcare system. With our large platforms and market experience, we are the driving force for more collaboration to achieve this goal. International partners can be part of our ecosystem by embedding their solutions or becoming a distribution and implementation partner.

What are your most important "lessons learned" from the pandemic for international business?
As a software company that is covering almost all critical healthcare pathways, we have been "at the forefront" from the very beginning. We reacted mmediately, developed and provided software modules to our customers free of charge. The biggest challenge, however, was the switch to virtual customer training which we successfully managed thanks to our enthusiastic team.

🔗 **www.cgm.com**

Daniel Nathrath
Co-founder & Chief Executive Officer, Ada Health GmbH, Berlin

What distinguishes digital health "made in Germany" in international comparison?
Germany is a melting point of talent – and one of the best innovation hubs in the world – particularly in the disruptive digital health technology. At Ada, we have invested 10 years in building powerful AI with a relentless focus on medical quality and user-centric design. Leading healthcare organizations all over the world rely on Ada's solutions to help their users make informed healthcare decisions.

What can international partners expect from collaborating with Ada?
At Ada we all share a passion for medical quality and scientific rigor - it's a core part of our culture. Clinicians are involved in developing and testing our AI to ensure accuracy and safety. Partners appreciate our commitment to building solutions on the most innovative technology, fostering interoperability across their ecosystem and our expertise in transforming care pathways with AI.

What are your most important "lessons learned" from the pandemic for international business?
Digital health is no longer a "nice to have." The pandemic has highlighted the integral role that digital health plays in helping people find and access the right care. We have learned that user value holds more weight, with organizations expecting their users to be empowered to take action and anonymous data insights to be leveraged for improved care experiences and health outcomes across the board.

🔗 **www.ada.com**

Wilfried Bauer
VP Digital Solutions / Public & Health, T-Systems, Bonn

What distinguishes digital health "made in Germany" in international comparison?
Germany stands for engineering know-how and safety. The coronavirus warning app is the perfect example. We developed together with SAP the most successful tracing app against Covid-19 worldwide. The data protection of the Corona Warning app is exemplary

What can international partners expect from collaborating with T-Systems?
Simple, efficient, secure: That's what our offering for the healthcare sector represents. In our core areas of hospital IT, cloud and security, and e-health, we develop solutions that connect all players and make their lives and work easier. We are one of Europe's market leaders for healthcare ICT. Our team consists of over 700 healthcare specialists

What are your most important "lessons learned" from the pandemic for international business?
Viruses know no borders. On behalf of the European Union (EU), we have worked with SAP to ensure that member states' tracing apps warn of infections throughout Europe. We also enable the checking of vaccination certificates for the EU. The coronavirus was a booster for the digitalization of the healthcare industry. Moreover, there was also the realization: If politics and business pull together, digital projects can be implemented in record time.

🔗 **www.telekom-healthcare.com/en**

Industry Associations

The German digital health sector is represented by a number of industry associations that lobby for improvements for their member companies. HEALTH MADE IN GERMANY works closely together with them to provide support for international companies seeking collaboration and partnerships with German companies active in the digital health sector. To further enhance sector visibility, we facilitate the presence of German players at relevant industry events and provide a platform for connecting with international partners.

bitkom

Bitkom
Branchenverband der deutschen Informations- und Telekommunikationsbranche
Bitkom is Germany's digital association. Founded 1999 in Berlin, Bitkom represents more than 2,000 companies of the digital economy. Membership spans more than 1,000 SMEs, over 500 start-ups and virtually all global players. Bitkom members offer software, telecommunications and internet services, produce hardware and consumer electronics, operate in the digital media sector or are in other ways affiliated with the digital economy. More and more companies across all sectors are joining Bitkom as they digitize their business models. Bitkom advocates the digitization of the economy, society and public administration. The association is pushing for the faster rollout of gigabit networks and digital infrastructure for energy and mobility, for trade and for smart homes, for cities and regions. Bitkom supports policies for data-driven business models, for data protection and cybersecurity, for platforms, disruptive technologies, work 4.0 and life-long education in a digital world. A strong European digital policy and a fully integrated digital single market are at the heart of Bitkom's concerns, as well as establishing Germany as a key driver of digital change in Europe and globally.

www.bitkom.org

DMEA — Connecting Digital Health

DMEA - Europe's central meeting place for health IT
Once a year in April, the Messe Berlin exhibition grounds are turned over to all things digital healthcare related. This is when the "DMEA – Connecting Digital Health" event brings together all of the relevant players: from the industry to the medical and nursing professions as well as policymakers, local administrations and science and research actors. Visitors can expect presentations, discussions and workshops held by and including speakers from science and practice. The spectrum of topics covered ranges from the digitalization of care to artificial intelligence and the added value of digital prescriptions. As well as this, around 600 manufacturers and suppliers present digital health innovations over 26,000 sqm of exhibition space – from IT solutions for general practitioners and laboratories to health apps and IT security. The topics of young talent and careers also have their place at DMEA – Europe's leading health IT event. At a program specially tailored to them, young digital health talents can gain insights into the industry and establish contacts with universities and potential employers.

www.www.dmea.de/en/

Deutsche Krankenhausgesellschaft

The German Hospital Federation (DKG) represents all public, private not-for-profit and private for-profit hospitals in all decisions relating to healthcare policy. It is a partner for policymakers and authorities, the German healthcare system's self-administration infrastructure, other associations and the scientific community. At the organization's headquarters in Berlin, 80 people work in ten departments, answering the full range of questions associated with hospitals. All hospital-relevant policies of the EU, cross-border healthcare in the EU, medical tourism with third countries, and the healthcare economy are among the issues addressed by the "EU policies, international affairs, health economy." Mandated by law, DKG is part of the "National contact point" for EU patients, which provides comprehensive information on hospital care to foreign patients.

www.dkgev.de
www.german-hospital-directory.de

Federal Association of Healthcare IT Vendors (bvitg e. V.)

There is no way around digitalization if healthcare in Germany is to be improved and made future-proof. For more than 25 years, the Bundesverband Gesundheits-IT – bvitg e. V. ("Federal Association of Healthcare IT Vendors") has been advocating the comprehensive use of digital solutions in the healthcare system. Today, IT solutions already make a significant contribution to healthcare and support medical staff in their daily work. Since its establishment in 1995, bvitg has made the removal of hurdles to the digitalization of the healthcare system its mission, in order to guarantee fair competition and strengthen the position of IT providers active in the healthcare sector. Over 70 percent of member companies are active in international markets. The bvitg makes use of this unique expertise in its working and project groups in which experts from diverse fields work together on a voluntary basis on matters relevant to the association and the industry including data protection, IT security and telemedicine.

www.bvitg.de

Netzwerk für eHealth Systeme und Telemedizin

The National Association for eHealth Systems and Telemedicine (Netzwerk für eHealth Systeme und Telemedizin - NEST) is an amalgamation of companies, research institutions, hospitals, organizations and individuals. The network's aim is to use innovation to improve patient care and make healthcare more effective. This is achieved by developing, manufacturing and jointly marketing products and services. New applications for innovative technology and standardization processes play a decisive role in the eHealth and telemedicine sector. This facilitates simultaneous orientation towards national and international markets. Abroad, NEST is mainly active implementing projects and research joint ventures in the Arab-speaking world, the Balkans and the former Soviet republics.

www.nesttelemedizin.de

HEALTH MADE IN GERMANY

Germany is one of the world's most important providers and exporters of healthcare products and services. The country's innovative medical products set international standards for quality, safety and reliability. German manufacturers and service providers in all health and life sciences segments attract overseas customers and partners and deliver leadership in healthcare innovation.

HEALTH MADE IN GERMANY is the export initiative for the German healthcare industry. It supports international companies and organizations that are interested in establishing contact with potential German partners and suppliers. Set up by the German Federal Ministry for Economic Affairs and Climate Action (BMWK), the initiative bundles expert market intelligence for easy industry access. One of the initiative's main goals is to promote the German healthcare sector through international networking activities for the mutual benefit of international partners and German companies alike.

HEALTH MADE IN GERMANY does this by providing proactive support (including market and regulatory insight), introductory services, and networking platforms including trade events at home and abroad. The initiative serves four major industries active in the international medical market: pharmaceuticals, medical technology, medical biotechnology, and digital health care

HEALTH MADE IN GERMANY also works closely with 16 major German industry associations and is part of the BMWK's MITTELSTAND GLOBAL umbrella program for small and medium-sized enterprises. The initiative is ideally placed to provide access to German healthcare market information and to help overseas businesses identify potential German partners.

The HEALTH MADE IN GERMANY initiative is implemented by Germany Trade & Invest, the economic development agency of the Federal Republic of Germany, on behalf of the BMWK.

For more information:
www.health-made-in-germany.com

Our support for your business:

We publish market briefs, in-depth market studies and company directories of the German healthcare industry and its different sectors.

Our calendar is regularly updated with the latest industry events in Germany and overseas.

We take part in leading healthcare trade fairs all over the world, organize networking events and enjoy ongoing dialogue and exchange with international health policymakers.

We provide free access to 3,500+ German healthcare companies with our online database. Detailed company profiles and direct contact information help international businesses to identify potential suppliers and partners in Germany.

Visit www.health-made-in-germany.com for more information about the German healthcare industry and all HEALTH MADE IN GERMANY activities.

Expert Advice

Stefanie Zenk is the senior manager responsible for the medical technology and digital health industries at HEALTH MADE IN GERMANY. She is your point of contact for expert advice in these fields and looks forward to receiving your inquiries and requests.

Get in touch with us to learn more about what HEALTH MADE IN GERMANY can do for you.

Stefanie Zenk
Senior Manager, Medical Technology and Digital Health

T +49 30 200 099-756
Stefanie.Zenk@gtai.com
www.health-made-in-germany.com
www.gtai.com

Imprint

Notes

Supported by:

Federal Ministry
for Economic Affairs
and Climate Action

on the basis of a decision
by the German Bundestag

About Us

Germany Trade & Invest (GTAI) is the economic development agency of the Federal Republic of Germany. The company helps create and secure extra employment opportunities, strengthening Germany as a business location. With more than 50 offices in Germany and abroad and its network of partners throughout the world, GTAI supports German companies setting up in foreign markets, promotes Germany as a business location and assists foreign companies setting up in Germany. All investment services and related publications are free of charge.

Germany Trade & Invest Headquarters
Friedrichstraße 60
10117 Berlin
Germany
T +49 30 200 099-0
F +49 30 200 099-111
invest@gtai.com
www.gtai.com

Germany Trade & Invest Bonn Office
Villemombler Straße 76
53123 Bonn
Germany
T +49 228 249 93-0
F +49 228 249 93-212
info@gtai.de
www.gtai.de