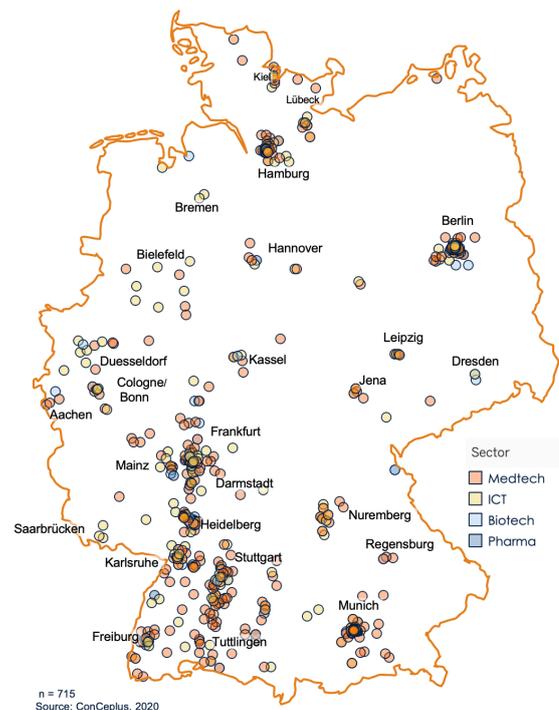## No time for a deep dive?
A 3-minute briefing on Key Facts – Germany

Germany's Healthcare Movers (HCMs) rank 2nd out of 11 key markets!

- **634 national** and **81 international HCM companies** (with a subsidiary in Germany) form the strongest industry cohort in Europe

- **Germany's SMEs** (n=601) are **rank 1st** in next-level technology competences and business model agility

- About **28%** of Germany's healthcare industry are engaged in the digital transformation of their product & service offering

- They employ about **134'000 employees**

- A **strong academic network** is the foundation of excellence for start-ups and industry alike

- Germany is **uniquely positioned in "High-Tech Medicine"** and **"Surgical & Critical Care"** segment internationally

- **46 local stakeholders** rank among the Global Top 100 HCM cohort

- The **Avant-Garde** cohort (n=168) is driving the competitiveness edge and success-stories of the digital transformation. They rank 2nd in critical **future orientated themes**

  - ✓ **Advanced ICT innovation** (like AI, ML, and DL)

  - ✓ **Holistic integrated business model**

  - ✓ **Public-Private-development partnerships**

- Out of 239 HCM Start-ups in Germany, **46** rank in leading **Avant-Garde** cohort

- **10 ICT service providers** forming their own top league of Avant-Gardes, being high-end enablers to healthcare industry stakeholders

HCM Landscape in Germany in 2020

n = 715
Source: ConCeplus. 2020

Critical observations on the German HCM ecosystem

- The **international HCM Top 100** stakeholders significantly outperform German stakeholders in their global business innovation behavior as well as in their broader healthcare data competences.

- The Avant-Garde see a **need for greater collaboration** to overcome data silos than anticipated by the current national policy makers' digitalization push.

- A **broader data usage and interoperability** - which is currently reflected in an average DAS score - must be put more into focus, especially by non-Avant-Garde stakeholders.

- **The Covid-19 pandemic acts as change accelerator** on healthcare industries affecting data sourcing, smarter diagnostic technologies, and business models, all taking place more quickly than ever before.