Mannheim Medical Technology Cluster

www.medtech-mannheim.de/en

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WELCOME TO
MANNHEIM²

YOUR EUROPEAN HOT SPOT FOR MEDICAL TECHNOLOGY
Fearless go-getters are part of Mannheim’s genetic code – where pioneer spirit has been meeting entrepreneurship for centuries. Around 9,000 companies drive our economic motor today and use the city’s creative energy to their advantage – just like the great inventors Karl Drais, the Lanz brothers or Carl and Bertha Benz before them. Today, market-moving innovations are being developed here – in the fields of electro mobility, medical technology and augmented reality – among other things. Global players, strong small and medium-sized enterprises, and a vivid start-up scene call Mannheim their home. Networking, knowledge-transfer and close cooperation between business, research, and politics are a given. We also offer professional support in seven target-group specific start-up centers. The result: in Mannheim, a thriving economy connects with great innovative potential to turn today’s ideas into tomorrow’s discoveries.

Dr. Peter Kurz
Mayor
City of Mannheim
Character and strong structures as a key to success

Strong businesses, trendsetting industries, highly trained skilled workers. Behind Mannheim’s sometimes less than glamorous façade, there hides a globally connected and highly developed city with substantial location advantages. This is a can-do city, which offers its businesses and doers all the possibilities and opportunities needed to make it happen. This mentality has made Mannheim the economic center of the Rhine-Neckar Metropolitan Region and an important European business location.

A business location with some rough edges and a very special energy all its own – home to global players like Daimler, Roche Diagnostics or John Deere, but which also attracts emergent, internationally active medium-sized enterprises and start-ups from a variety of industries. The result: a colorfully diverse city with a highly heterogeneous business landscape. And these businesses can count on ideal conditions with fully developed and serviced commercial and industrial sites with attractive addresses.

City of business, knowledge and the people

Our central location within Europe, the optimally developed transportation network and the many highly trained skilled workers are some of the compelling sustainable advantages vs. other similar locations. The city is also home to an eclectic mix of leading institutes of higher education: like the University of Mannheim, whose Faculties of Law and Economics are both in the Top 50 in the world, Baden-Württemberg Cooperative State University and the Popakademie attract smart and creative people which also helps to forge close links between industry and academia. This creates synergies that continue to lead to exciting and unexpected results. On top of that, Mannheim offers an extremely high quality of life with a wide variety of sights and things to do in the region and a vibrant cultural scene. Mannheim: the city of business, knowledge and the people.
Perfect traffic connections

Almost no other city allows you to reach your destinations so easily – be they close or far away. A 31-minute ICE train ride takes you directly to Frankfurt Airport, an important hub in international air traffic, only 2:58 hours on the ICE and you are in Munich, or 3:09 hours and you are in the middle of Paris.

A quick access to highways A5, A6, A61 and B9 provide time-saving and effective travelling by car to meet your customers and business partners in the greater Mannheim area and beyond.

Central and well-connected

The commuter rail system “S-Bahn Rhein-Neckar” helps you to attract talents and professionals, while connecting Mannheim directly to all major cities in a 60 km distance. Four of the seven S-train lines go through the Mannheim main station. From the Mannheim Airport it is only a short flight to get to the big cities of Berlin and Hamburg.

Mannheim provides a large variety of medical technology companies along the value chain, both in the city and within a one hour car drive around. This includes suppliers, manufacturers, contract manufacturers and contract engineering companies, distributors and specialized service providers, with all of them being focused on the medical technology sector. While a majority of these is considered a small- and medium sized company or startup, also a considerable number of global corporations have established operations in Mannheim and the region. With approximately 9,500 staff in 90+ medical technology businesses this sector represents one of the biggest industries in Mannheim.

Quick access to a broad environment of global medical device industry partners that can help you leverage your own resources and capabilities. Excellent conditions in which to achieve your goals.

Abbott Diagnostics
Abbvie Pharma
Bausch & Lomb Medical
BD (Becton Dickinson)
Bruker
C.R. Bard
Dentsply Sirona
Fresenius Medical Care
Hitachi High-Technologies
Johnson & Johnson DePuy
Johnson & Johnson LifeScan
Leica Micro/Biosystems
LeMaitre
MAQUET
Merck
Merck Serono
Nestlé Healthcare
Pfizer Pharma
Roche Diagnostics
Sanofi Aventis
Siemens Healthcare
Terumo
The clustermanagement-team provides a considerable range of services and support schemes tailored to the specific needs of medical technology companies. This includes, for instance, the following activities:

**Networking**
Decision makers from medtech companies, hospitals, universities and research organizations meet at the quarterly networking series “MedTech-Dialogue” to build relationships with other professionals and organisations from the industry, and to get updated on current opportunities and issues of the industry.

**Search for suitable partners**
The clustermanagement-team supports you in identifying, qualifying and approaching the appropriate partners for you that match your specific needs. This may include partners in technology, R&D, manufacturing, sales, clinical affairs, regulatory affairs and other fields of your operations.

**Expert Advice**
The clustermanagement-team provides you direct access to a dedicated group of experts that offer specific consulting services to address the key challenges of medical device startups and SMEs in four critical areas: (1) clinical advisory, (2) regulatory market access, reimbursement and HTA, (3) market research and distribution, and (4) technology transfer and -collaboration.

**Operational Advisory**
The clustermanagement-team provides hands-on support for your operational challenges as well as management advice for strategy and execution of your medical device business.

**Further Education & Training**
The clustermanagement-team provides you with a further education and training program addressing both, your personal skillset as well as strategic issues of your business.

**Critical Infrastructure**
Beyond excellence at individual or company level, being part of a powerful medical technology innovation ecosystem is considered instrumental to develop products faster and more efficiently and to market them more sustainably. The clustermanagement-team reinforces this innovation ecosystem by providing office, workshop, laboratory and cleanroom facilities, such as the medical technology startup- and competence-center CUBEX41 and the novel Mannheim Medical Technology Campus.

For further information visit: www.medtech-mannheim.de/en

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**CLINICAL OPPORTUNITY**
Mannheim provides you quick access to key opinion leaders in high-volume centers in Mannheim city and 10 miles around:

- Mannheim University Hospital (1,400 beds)
- Mannheim Theesien-Hospital & St. Hedwig (660 beds)
- Mannheim/Speyer Diakonie Hospital (540 & 440 beds)
- Ludwigshafen Hospital (940 beds)
- BG Ludwigshafen Trauma Surgery Center (450 beds)
- Heidelberg University Hospital (1,700 beds)

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**RESEARCH OPPORTUNITY**
Mannheim provides access to a powerful ecosystem of collaborative clinical research and product R&D:

- Central Institute of Mental Health
- European Laboratory for Molecular Biology (EMBL)
- Fraunhofer Group for Automation in Medical Engineering and Bioengineering
- Freudenberg New Technologies GmbH
- German Cancer Research Center (DKFZ)
- Heidelberg University Medical Center
- Institute of Medical Technology (IMT)
- Mannheim University Medical Center
- Mannheim University of Applied Sciences
- Max-Planck-Institute for Medical Research
- National Tumor Center (NCT)
- Roche Diagnostics Research Center Mannheim

Deep therapeutic knowledge and understanding of clinical development drives more efficient pathways to commercialization. Whether you are conducting a clinical study or are managing a product life-cycle, Mannheim includes CROs dedicated to support you. The following shortlist presents just a sample of CROSs in Mannheim:

- AMS Advanced Medical Services
- CONET Clinical Operations Network
- CRS Clinical Research Services Andernach
- FORIM
- IST Clinical Research
- KKS Coordination Center for Clinical Studies
- PharmaLex
- PRA International
- QUINTILES Innovex
- Scope International

Physician training is key to launching medical devices, and to drive adoption and diffusion of new medical technologies. The Mannheim medical technology cluster provides you quick access to simulator centers dedicated to physician training in surgical and transcatheter therapies:

- Cathi Simulator Training Center
- CardioSkills Simulator Training Center
- VRmagic Eyesi Simulator Training Center
MORE KEY ASSETS & PROGRAMS

Industry-in-Clinic Platform Mannheim

This platform enables the development of innovative medical devices for the clinical standard care using a network of clinicians, technical and regulatory specialists. It offers modular consulting and services and specialized infrastructure, e.g. an experimental hybrid OR, for SMEs, start-ups and established medtech companies.

Project Group for Automation in Medicine and Biotechnology (PAMB)

Fraunhofer is the largest research organization for applied research in Europe. Their Project Group for Automation in Medicine and Biotechnology (PAMB) is based at the University Medical Center Mannheim (UMM). It operates a full-scale hybrid OR for experimental work. Core competencies include interventional treatment options, imaging, lab automation, human interface, image post-processing, process management systems, bioanalytics, optical measurement, biomedical sensors and microsystems.

BMBF Research Campus “Mannheim Molecular Intervention Environment (M²OLIE)“

The aim of M²OLIE is the establishment of a patient-oriented and time-optimised infrastructure for innovative tumour therapies by means of molecular intervention within the framework of a one-stop shop. In a multidisciplinary development centre with partners from industry, research and public life new methods for molecular imaging, diagnostics and therapeutic interventions of oligometastatic patients in daily clinical practice are developed.

BMBF Innovation Partnership “Multimodal Analytics and Intelligent Sensor Technology for the Healthcare Industry (M²Aind)“

The Innovation Partnership M²Aind - Multimodal Analytics and Intelligent Sensor Technology for the Healthcare Industry is a network between the Mannheim University of Applied Sciences and numerous companies in the healthcare industry. The research and work focus is on the interface between biomedicine and information technology. The aim of M²Aind is to develop new products and services for the pharmaceutical, chemical, medical device, biotech and diagnostics industries using modular technology platforms.

State Coordination Office for Telemedicine

The Telemedicine Coordination Office in Baden-Württemberg (KTBW) is the central point of contact for cross-sector cooperation between research and teaching, medicine, technology and industry in order to sustainably improve telemedicine care in Baden-Württemberg.

SKILLED LABOR OPPORTUNITY

Mannheim provides quick access to leading academic institutions dedicated to providing a ready pool of graduates for medical device R&D, operations, supply chain, QA, regulatory, marketing, sales and distribution:

- University of Applied Science (Medical Engineering)
- Medical Faculty Mannheim of Heidelberg University (Medicine)
- Mannheim University (Business)
- DHBW Cooperative State University (Electrical/Medical Engineering, Business)
- Graduate School Rhine-Neckar (Life Science & Healthcare Management)
- University of Applied Management Studies (Business)
- Vocational colleges for nurses and nurse-technicians

ACCESS TO EXPERTS

Your fast track to dedicated medtech experts

Mannheim provides direct access to a dedicated group of experts that offer specific consulting services to address the key challenges of medical device start-ups and SMEs in four critical areas. Start-ups and SMEs based in Mannheim can apply for subsidies for using those consulting services.

<table>
<thead>
<tr>
<th>UNITS</th>
<th>KEY CHALLENGES</th>
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<tbody>
<tr>
<td>1 Unit for Disease State Clinical Advisory</td>
<td>- No or suboptimal real-time validation of product development steps in clinical routine practice</td>
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<tr>
<td>2 Unit for Market Access and Health Technology Assessment</td>
<td>- No or suboptimal regulatory market access and/or access to reimbursement</td>
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<tr>
<td>3 Unit for Market Research, international Out-Licensing, and Continuing Education</td>
<td>- Gap in distribution &amp; market penetration</td>
</tr>
<tr>
<td>4 Unit for Technology Transfer and Public-Private-Academic Collaboration</td>
<td>- Gap in technology transfer</td>
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Your fast track to dedicated medtech experts
CUBEX
Start-up & Competence Center Medical Technology

The innovative center for start-ups and competences in the field of medical technology offers everything that is necessary for the success of an idea as well as for the growth of a company in this complex future field:

- Proximity to people, brands and markets, i.e. Fraunhofer Project Group for Automation in Medicine and Biotechnology with experimental Intervention Suite / Hybrid OR, BMBF Research Campus M²OLIE
- Know-how of experts around the idea itself ("PROFITeams")
- Infrastructure for perfect development and testing, i.e. access to the intervention space of the future as a partner of the research campus M²OLIE
- Flexibility in terms of architecture and equipment, after all, it is not the size of the rooms that determines the size of your idea, but rather its equipment for your growth

LIFE SCIENCE ACCELERATOR

The Life Science Accelerator Baden-Württemberg is a joint program of Technologiepark Heidelberg GmbH, Heidelberg Startup Partners e. V., the economic and structural development of the City of Mannheim as a branch office of the MAFINEX Gründerverbund e. V. (founders’ association), and the Foundation for Medical Innovations in Tübingen. The Life Science Accelerator was inspired by Stanford University’s renowned Biodesign Program. The program will run for three years (until 2020) and comprises three modules: First, medical needs will be identified within the framework of a “Needs Identification” module at research institutions and clinics. In the second module “MedTech Startup School”, students and scientists convert their ideas into business models. The intensive “Life Science Accelerator” qualification program as a third module helps existing teams to accelerate their formation. At the end of the third module, the incorporated start-ups are pitching in front of investors and experienced entrepreneurs. The program supports scientific and technological start-up teams from Germany and abroad in Baden-Württemberg with a focus on biotechnology, medical technology and digital healthcare.

The Life Science Accelerator Baden-Württemberg is supported by the Ministry of Economics, Labour and Housing of Baden-Württemberg with funds from the European Social Fund (ESF) and the State of Baden-Württemberg.

For further information visit: www.lifescience-bw.de
MANNHEIM MEDICAL TECHNOLOGY CAMPUS

The MMT-Campus provides a unique concentration of industry, hospital- and research facilities, all within walking distance. This ultimate proximity is instrumental to developing medical devices faster and more efficient.

GLÜCKSTEIN – QUARTIER

Mannheim’s new urban quarter

Located in the heart of Mannheim close to the central station, the Glückstein Quarter blends working, living and public spaces in perfect balance. This new urban features state-of-the-art offices, scientific facilities, upscale housing and social meeting places. A network of green spaces and the proximity of the Rhine River allow a high standard of working and living.

An opportunity for visionaries – a future for entrepreneurs

The new urban quarter close to the central station is one of the most important development projects for Mannheim in the coming years. Up to 4,600 jobs will be created in addition to new homes for 1,500 residents. A number of projects have already been completed in the area previously known as “Mannheim 21”, to great effect: Victoria Tower, the MAFINEX Technology Centre for innovative, technology-focused entrepreneurs, and the LanzCarré. Glückstein Carré is currently under construction.

The best location in the best company

The city’s excellent connections to rail transport, airports and motorways, and its central location within the metropolitan region and Europe make Mannheim an attractive location. Corporate groups such as ABB, Bilfinger, Daimler, John Deere, Roche, essity, Bombardier, Caterpillar and many others appreciate this potential and have been investing here for many years.

At the heart of work and research

Nestled in close proximity to the central station, city centre and the popular Lindenhof district, the Glückstein Quarter is an extremely attractive location for investment. Upscale office and commercial spaces are being developed over a gross floor area of around 169,000 m². And that’s not all. Situated in the immediate vicinity of the University of Mannheim and the Mannheim University of Applied Sciences, there are a wealth of highly qualified potential employees right on the quarter’s doorstep. Advantages that pioneers have been appreciating and capitalising on since 2001.

Development stage one of this novel innovation ecosystem starts in spring 2017 and includes:

- Business Development Center for medical technology, expected to consist of 5 equipped laboratories, 50 offices and 40 iCubes as flexible room units for office, workshop or laboratory use. A full catering area and a meeting room for approximately 80 people are provided as well. The building comprises around 5,000 m² gross floor space and an underground parking lot.
- Three other buildings of the investor Technology Park Mannheim GmbH with a total of about 15,000 m² gross floor space for commercial offices, workshops and laboratories in a flexible room arrangement as well as underground parking.
- Redundant fiber optic data connection
- Grown urban environment
- Connection to five public tram lines – reach Mannheim’s main shopping street ‘Mannheimer Planken’ in just 6 minutes or Mannheim main station in just 9 minutes.

Tenants of the MMT-Campus

Future tenants from the medical technology sector are entrepreneurs (start-ups), spin-offs from research units as well as commercial/industrial spin-offs, small and medium enterprises and public-private partners in applied research and development projects. Being located on the MMT-Campus as well as being within walking distance of the adjacent University Medical Center Mannheim, facilitates straightforward personal exchange between stakeholders from businesses, clinics and research institutions.

- University Medical Center Mannheim with research focus on medical technology
- Fraunhofer Project Group for automation in medicine and biotechnology (PAMB) of the Fraunhofer IPA
- Institute of Medical Technology of the University of Applied Sciences Mannheim and Heidelberg University
- Research Campus for minimally invasive cancer therapies (M²OLIE) of the Federal Ministry of Education and Research
- Start-up and Competence Centre Medical Technology CUBEX
- Experimental Hybrid OR

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“The proximity of entrepreneurs, clinicians and researchers guarantees constant exchange and immediate reaction/feedback cycles. Your cup of coffee will not even stand a chance to cool down on the way.”
One of 12 nationwide Digital Hubs is being established in the Rhine-Neckar region. This is a major step towards becoming a digital model region. The Digital Hub “Ludwigshafen / Mannheim” focuses on chemistry and health. With this initiative, the German Federal Government intends to further strengthen the cooperation between start-ups, science, SMEs and large companies in order to better raise the industry-specific innovation potential of digitization in the various regions.

The “Hub” idea is based on the fact that the cooperation between large companies and entrepreneurs in a small space promotes innovation, especially in the digital age. This requires hubs with an international reputation, in which German and international start-ups, scientists, investors and established companies mutually reinforce each other. A common umbrella brand (hub) and a joint hub agency, operated by the digital agency RCKT, will facilitate the networking and exchange of know-how.

Currently healthcare is subject to a digital transformation including digitalized procedures, processes and products. This digital transformation towards a precision- and system medicine facilitates increased efficiency and effectiveness in healthcare, and, thus, presents a global and scalable growth market for SMEs, large corporations and startups. Mannheim and the region already enjoy a large variety of commercial operations as well as research consortia and platforms dedicated to driving the digital transformation of healthcare forward.

Digital health Companies in Mannheim and the Rhine-Neckar Region

- Dentsply Sirona Imaging/CEREC, Bensheim
- ICW, Walldorf
- Siemens Healthineers, Mannheim
- TWT Digital Health, Heidelberg
- MediNet IT, Mannheim
- IHO, Mannheim
- CIBEK, Limburgerhof
- Dosing, Heidelberg
- QIT Systems, Mannheim
- mediri, Heidelberg
- Vitalberty, Mannheim
- ALCOM, St. Ingbert
- Medicon, Heidelberg
- Hoo.apps, Mannheim
- SAP Health Analytics, Walldorf
- Solutions, Mannheim
- Vitaphone, Mannheim
- mint medical, Dossenheim
- AMRN Space for Health, Mannheim
- Gotthardt Health Group, Heidelberg
- vmapit, Mannheim
- Healthy MRN, Mannheim
- CHILL, Dossenheim
- mediDOK, Dossenheim
- Medesso, Mannheim/Mainz

Research consortia and platforms

- SIEMENS Healthineers: Regional Digital Use Case Liver Diseases
- Telemedicine Baden-Württemberg: Mannheim
- BMFB Consortium Innovation Alliance M²Aind, Mannheim
- BMFB Consortium Research Campus M²OLIE, Mannheim
- BMBF Consortium Medical Informatics MIRACUM, Mannheim
- DE: hub chemistry / health
- Health Network Rhine-Neckar
- Industry-in-clinic platform Mannheim
Innovating
- Accounts receivables management
- Accounting, forecasting, reporting

The ready-to-go sales office team provides experience in partnering with UK medical device companies, and understands your standards and contractual agreements. Potential access to these programs needs to be further evaluated. Federal Government Incentives in Mannheim

Ther is a large variety of financial support programs, particularly for start-up companies and SMEs, ranging from research to commercialization. Potential access to these programs needs to be further evaluated. Programs include, e.g.:

- ZIM: Provides financial support for 25 % to 35 % of the company's actual R&D expenses (materials, staff, services, equipment), max. 350,000 EUR. Cooperating in your R&D project with another company or with an university increases access to this program, yet it’s not a precondition to be eligible for ZIM.
- Innovation Voucher B-Hightech: Provides financial support for 50 % of the company's actual R&D expenses, equipment, max. 20,000 EUR.
- SME Innovative – Medical Technology: Provides financial support for 50 % of the company’s actual pre-competitive R&D expenses.

Local Government Incentives

- Start-up incentive program KREATECH: Provides financial support for 50 % of a start-up’s investment in hardware, software, equipment and labour cost, max. 20,000 EUR.
- Optimal access to pre-seed/seed capital in Mannheim: The City of Mannheim provides a financial program to help bridge the gap to pre-seed/seed stage. The city's start-up program is able to demonstrate sufficient clinical evidence or technological proof of concept to access the venture capital market. In this unique program, the City of Mannheim becomes a shareholder of the start-up with up to 200,000 EUR. The goal is to agree with the entrepreneur on an exit date where the entrepreneur is able to buy the City's shares out in order to allow the City to then re-invest this amount again as a shareholder in a new start-up.

Ready-to-go sales office in Mannheim

The initial set-up of your German/EU direct sales organization may present a significant challenge to both, your P&L as well as your risk profile and management resources. When setting up your German/EU direct sales affiliate in Mannheim, you will be able to address those challenges using the ready-to-go sales office. Just hire your own local sales organization, and focus 100% on customers & taking market share. The ready-to-go sales office may take care of the rest, i.e.:

- Regulatory/legal status of “Inverkehrbringer von Medizinprodukten durch Herstellung oder Einfuhr” acc. to German medical device law Mfg
- Customer service/order taking
- Local warehouse
- Order processing
- Consignment stock management
- Shelf life management
- Local recall management
- Invoice
- Accounts receivables management
- Accounting, forecasting, reporting

Mannheim: The EU Direct Sales Office in Mannheim can also be set up as a fully-fledged sales office to support your existing sales force, e.g. for developing new products. Once the distribution channel is defined, you are able to focus exclusively on the business you want to pursue, knowing that the sales office is handling the business in Germany/other countries.

Financial performance and compliance in Mannheim

Financial performance and compliance according to international standards present key metrics for managing your business. Four worldwide leaders in business & strategic consulting run offices in Mannheim City, and provide business consulting, finance, taxation, accounting, and expat payroll services to you on site:

- Ernst & Young
- Deloitte
- KPMG
- PriceWaterhouseCoopers

Competitive Local Business Tax

Local Business tax is charged by all territorial authorities. Its key indicator forms the so-called Gewerbesteuer-Hebesatz %. Germany offers a favourable overall labour cost development when compared to other major geographies in Europe. The EU labour cost index includes salaries, social insurance charges for employers and labour-related tax deducting labour-related subsidies.

EU LABOUR COST INDEX Q4/2017

- Germany: 121.7
- The Netherlands: 121.4
- Italy: 100.9
- France: 106.1

Competitive Corporate Income Tax

The Corporate Income Tax does not include other taxes, like local business tax and other comparable taxes of federal and territorial authorities.

Competitive Corporate Incentives Tax

The Company’s Income Tax includes business tax, corporate income tax and other comparable taxes of federal and territorial authorities.

SAFETY IN NUMBERS

Competitive Land Cost

Germany offers a favourable overall labour cost development when compared to other major geographies in Europe. The EU labour Cost Index includes salaries, social insurance charges for employers and labour-related tax deducting labour-related subsidies.

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Competitive Local Business Tax

Local Business tax is charged by all territorial authorities. Its key indicator forms the so-called Gewerbesteuer-Hebesatz %.

COMPANY TAX COMPARISON OF EUROPEAN INDUSTRIAL AREAS 2016

- Germany: 15.8
- United Kingdom: 20.0
- The Netherlands: 25.0
- Italy: 23.5
- Belgium: 34.0
- France: 38.0

Source: Federal Ministry of Finance: Wichtigste Steuern im Vergleich, 2016

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