

Nationaal Groeifonds Tech4Health

Introduction to a panel discussion

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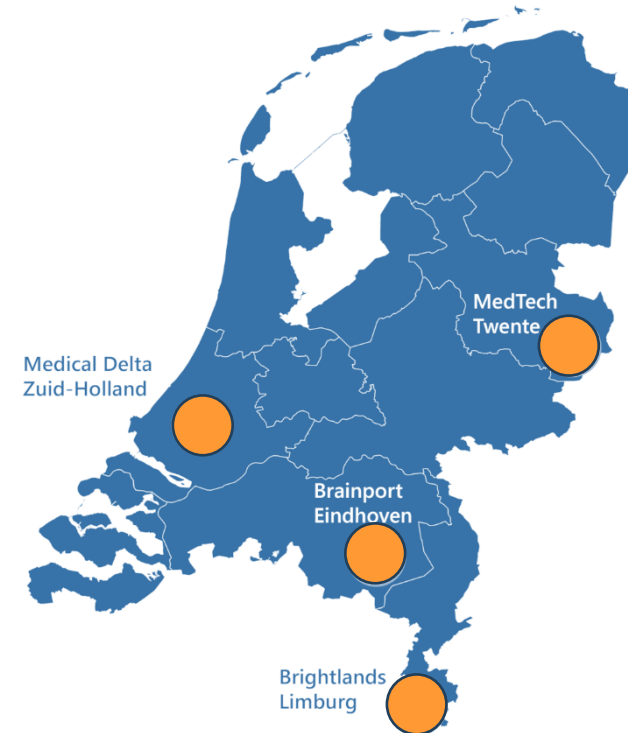


MEDISCHE ELEKTRONICA
Ontwikkelingen, normen en toepassingen

6 februari 2024 | Van der Valk Vianen

MedTech sector is a cornerstone of economy

- **8.1%** of the total **patents** worldwide, the 2nd largest applicant
- **€184,000** the average **added value** per employee
- 2nd place for the Netherlands in terms of **export value**
- **34,000 companies** at the EU level, of which 95% are SMEs - the drivers of innovation
- **Economic importance** in the EU and the Netherlands, revenue generating



MedTech enhances healthcare & well-being

- New pandemic: ageing & chronic diseases
- We spend **50% of their lives in less-than-good health**
- Shortage of **135,000 healthcare workers** by 2031 in the NL only
- Early **detection, holistic monitoring & timely intervention** enables prosperity & growth



Dutch trade mission to Minnesota MedTech

- Medtronic HQ
- PHILIPS IGT
- Boston Scientific
- Medical Alley
- Mayo Clinic
- Philips Innovation Lab @ Mayo clinic
- Desing of Medical Device conference

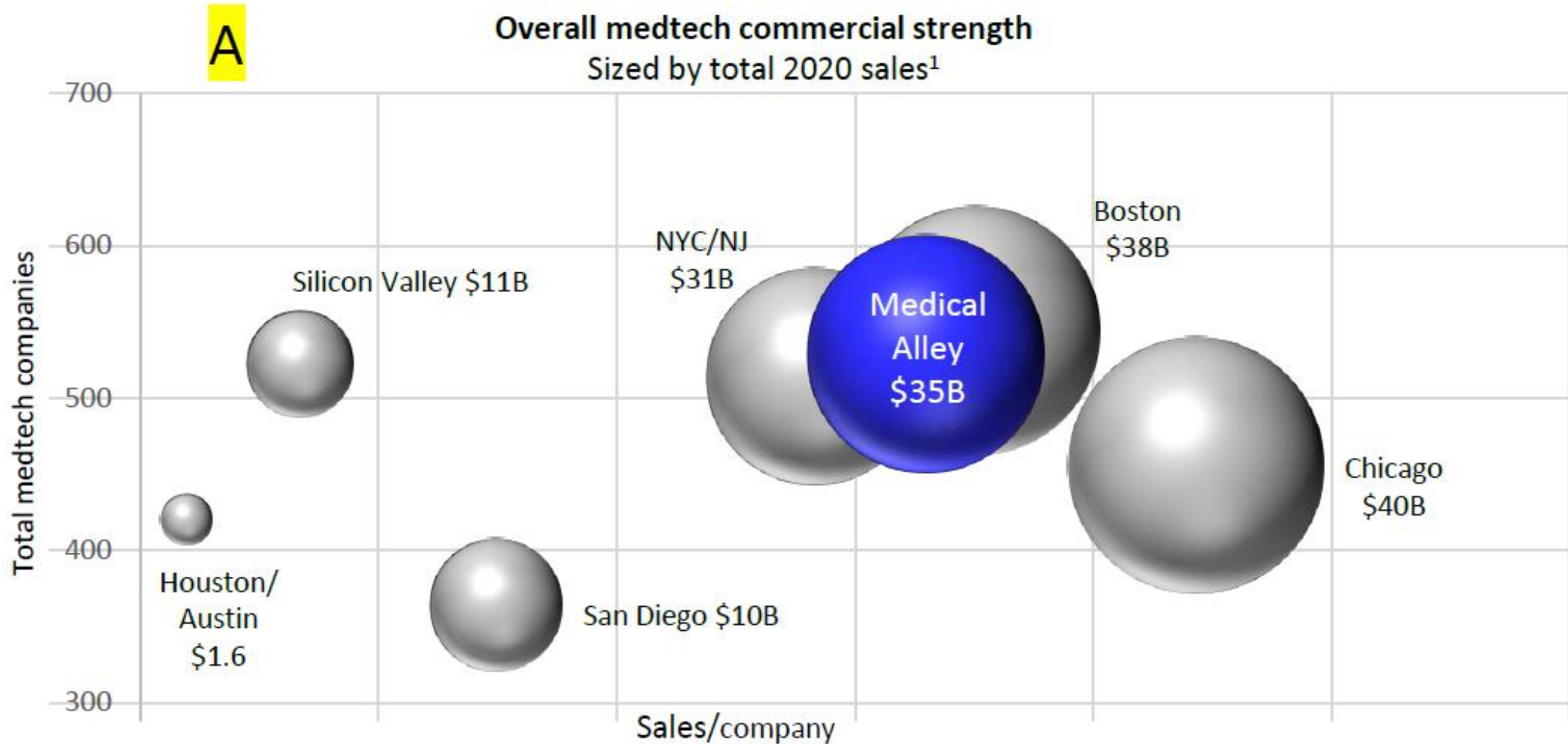


MEDISCHE ELEKTRONICA





Ontwikkelingen, normen en toepassingen

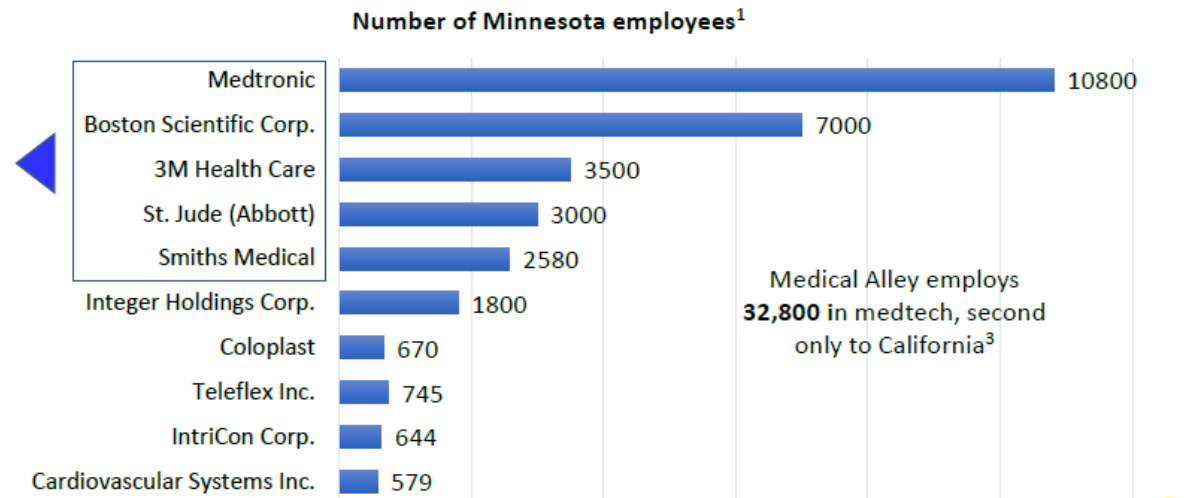
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Learning (1): High MedTech commercial strength



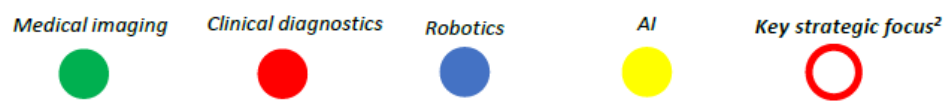
Learning (2): Dense in Medtech, high concentration of professionals + high levels of experience

	<p>Medtronic Cardiovascular, surgical, diabetes, neurological, spinal devices</p>
	<p>Boston Scientific Interventional radiology, cardiology, vascular, neuromodulation, electrophysiology, and more</p>
	<p>3M Healthcare Surgical safety, infection prevention, patient temp. reg., sterilization and reprocessing, drug-delivery devices and supplies</p>
	<p>St. Jude (Abbot) Cardiovascular devices and imaging systems, neurostimulation devices</p>
	<p>Smiths Infusion pumps, health-monitoring technology, catheters and ventilators, devices and consumables for patient care</p>



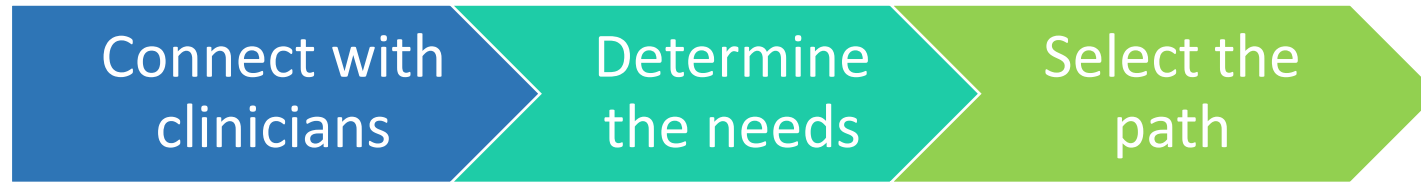
<p>Integer Electrochemical engineering; develops and manufactures surgical tools and parts for medical devices like pacemakers</p>	<p>Coloplast Ostomy care, continence care, wound and skin care, urology care</p>	<p>Teleflex Interventional medical devices for cardiologists, radiologists, electrophysiologists and vein practices</p>	<p>IntriCon Body-worn biotelemetry devices, hearing instruments and professional audio communications devices</p>	<p>Cardiovascular Systems Minimally invasive treatment solutions for vascular disease</p>
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Medical Alley is also the U.S. HQ of **Stratasys**, a global top 10 in medical 3D Printing⁴

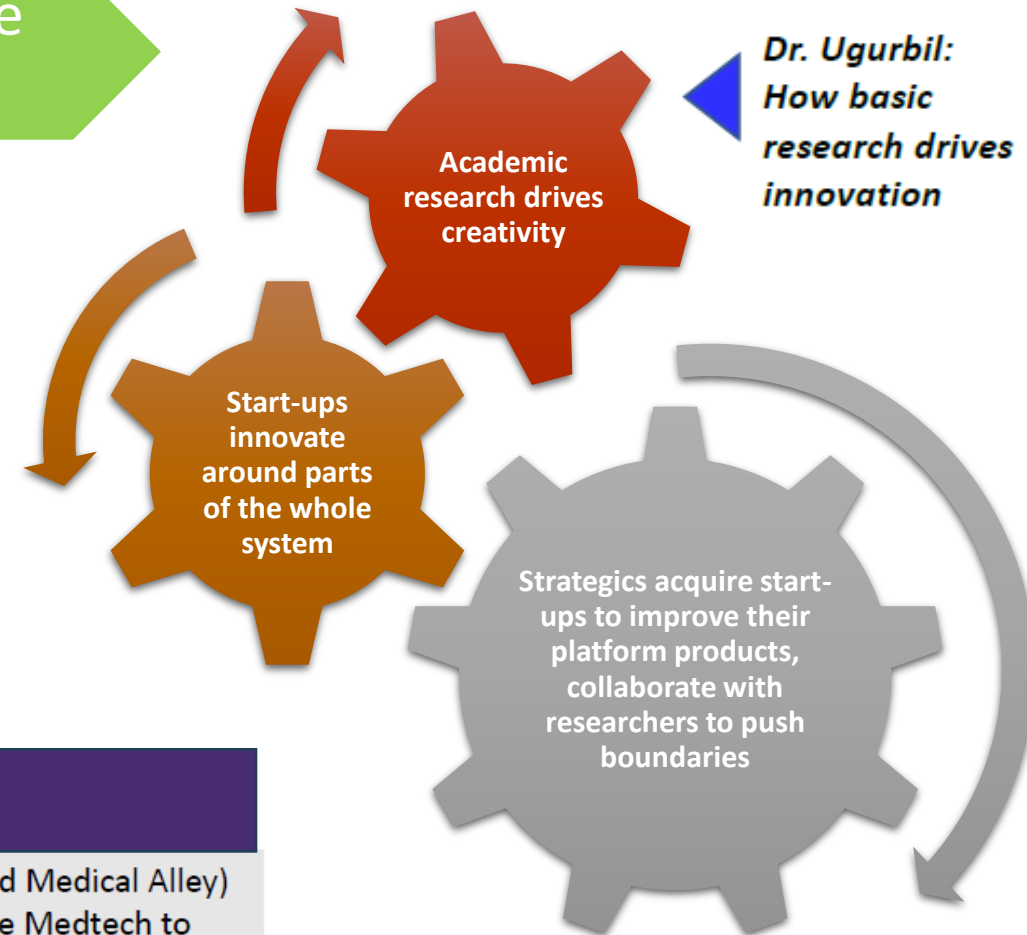


1. Variety of 2020/2021 sources. 3M is estimated based on # of MN employees/% of HC business
2. Investor relations documents
3. Minnesota DEED, Compare Minnesota, 2021
4. Dr. Hempel Digital Healthcare Network. Top 10 companies in medical 3D printing. 2021.

Learning (3): MedTech ecosystem



- Medtech ecosystem:
 - University of Minnesota, University Enterprise labs, Carlson School of management
 - MedTech companies
 - Mayo Clinic & Mayo clinic ventures



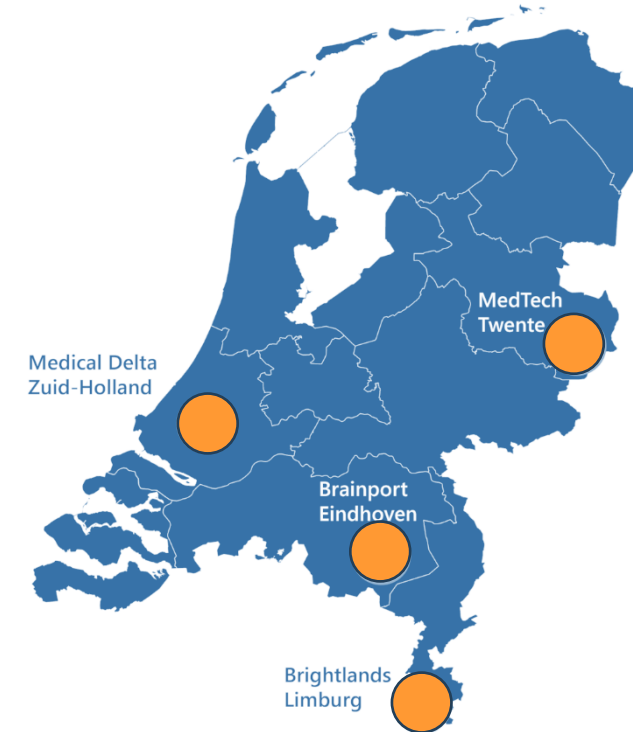
Efficiency in FDA clearance

Evaluate
Medtech

In 2015, Minnesota's Life Science Alley organization (now called Medical Alley) commissioned independent market research company Evaluate Medtech to examine average time to FDA clearance (510K and PMA) for U.S. states.^{1,2}

Dutch Medtech sector: transition momentum

- Multinationals acquire de-risked smaller **companies**
- Extra **investments** & time to de-risk
- Ecosystems increasingly rely on **public R&D**
- Dutch **Medtech transition** to a pluralistic system:
 - ✓ Clustering of imaging and sensing
 - ✓ Collaboration between universities, SMEs and medical centers
 - ✓ More impact for the MedTech start-ups
 - ✓ Stronger international positioning of the NL



Tech4Health nationale groeifonds program

Ambition

- **Netherlands** is an **EU leader** in MedTech in the field of medical **sensors** and **imaging**
- Creating a robust and diverse **MedTech innovation ecosystem**
- Maintaining NL leadership in specific **high-impact technology platforms** and related application development
- **50% reduction of time-to-market** for MedTech from 15-20 years to 8-10



Tech4Health nationale groeifonds program

TECH4HEALTH NGF

