SPATIAL ADOPTION MONITOR · PILOT EDITION

Who started spatial, and with what

A first cut from 390 open-access papers and their grant records. Fourteen DACH institutes, sixteen verified adoption events, three years. Not a lead list — a measurement of who moved first.

November 2026 Corpus: 390 papers · 93 with verified spatial methods Sources: Europe PMC full text · CORDIS · GEPRIS

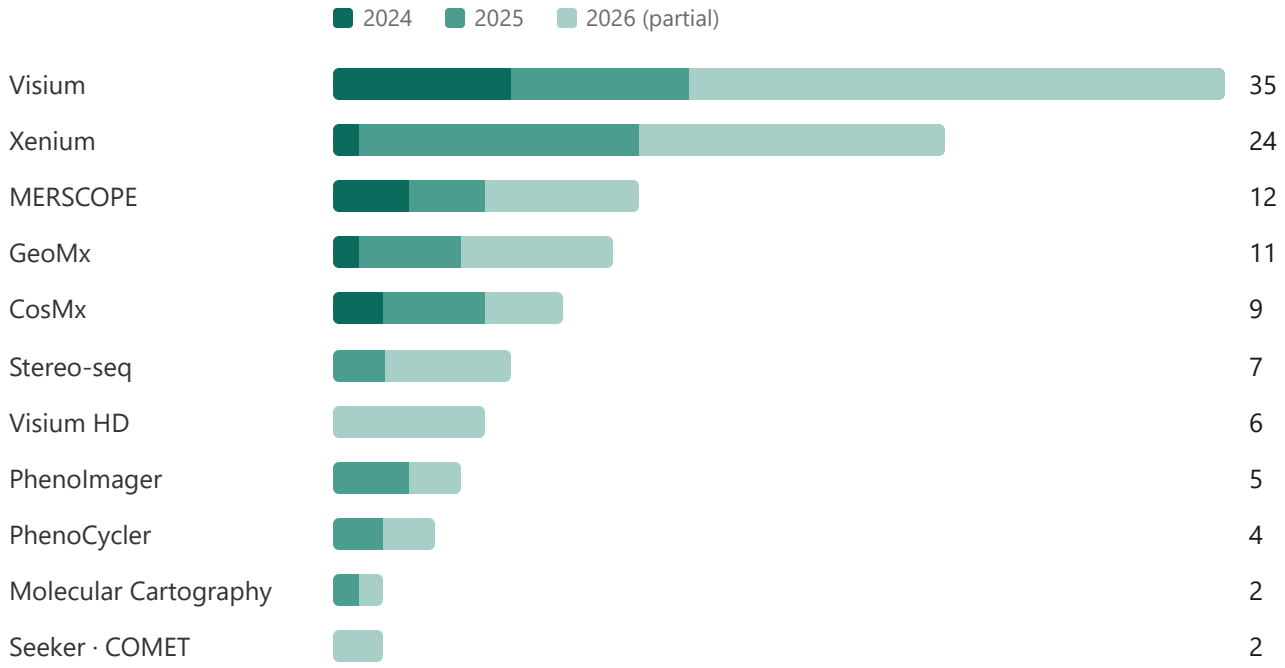
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New DACH entrants first appear on a platform other than Visium

Of the fourteen German, Swiss and Austrian institutes that enter this corpus with a spatial experiment, nine do so on Xenium, MERSCOPE, Visium HD or GeoMx. (Visium HD is itself a newer 10x product, counted separately from the original assay.) Visium still has the largest observed footprint — but it is not what the newest labs are being measured on.

93	117	14	0
papers with a verified spatial experiment	platform-level adoption observations	DACH institutes observed	confirmed displacements at lab level

PLATFORM MOMENTUM, 2024–2026



Counts are papers, not instruments. A paper can report more than one platform. 2026 covers January–October, and the corpus skews recent, so the 2026 step is partly a harvest artefact.

THE DACH PICTURE

INSTITUTE	COUNTRY	FIRST OBSERVED	PLATFORM	EVIDENCE
University of Würzburg	Germany	2025	Visium + CosMx	PMC12496100
Technical University of Munich	Germany	2025	MERSCOPE	PMC12148934
Hannover Medical School	Germany	2025	Xenium	PMC12537900
DKFZ Heidelberg	Germany	2025	Xenium	PMC12916745
DKFZ Heidelberg (second unit)	Germany	2026	Molecular Cartography	PMC13106858
DZNE Munich	Germany	2026	Visium (CytAssist)	PMC13392254
University of Cologne	Germany	2026	Xenium	PMC13689510
University of Tübingen	Germany	2026	Visium HD	PMC13659672
FAU Erlangen-Nürnberg	Germany	2026	Visium	PMC13505631
Max Delbrück Center, Berlin	Germany	2026	Xenium core facility	PMC13721972
Boehringer Ingelheim	Germany	2026	Xenium	PMC13148934
ETH Zürich	Switzerland	2026	MERSCOPE	PMC13337493
University of Lausanne	Switzerland	2026	Visium	PMC13433257
University Hospital of Geneva	Switzerland	2026	GeoMx	PMC13584352
Medical University of Vienna	Austria	2026	Visium + Stereo-seq	PMC13553300

“First observed” means first appearance in this 390-paper corpus, not the institute's true first experiment. DACH = Germany, Switzerland, Austria. One row per platform event; the MDC row is a core-facility run, not an owned instrument.

WHAT IS SWITCHING

> **Nothing, yet — and that is the finding.** Zero displacements can be confirmed at lab level. The two institutes that appear with more than one platform (Würzburg: Visium + CosMx; Vienna: Visium + Stereo-seq) used them side by side, which is complementarity, not replacement. DKFZ's 2025 Xenium and 2026 Molecular Cartography come from different lab units, so the sequence is not a switch.
>
> Why: affiliations name institutes, not labs. Two papers from the same department may be different groups. Displacement — the report's highest-value page — cannot be sold until lab identity is resolved. That is a data-model

problem, not a marketing problem.

WHAT THIS MEASURES

- First appearance of a spatial platform at an institute, from methods text
- Platform mix among *new* entrants, 2024–2026
- Owned vs core-facility use, where the text says so
- Grant linkage where a paper names an award (not shown in this cut)

WHAT IT DOES NOT

- Installed base, revenue, or market share
- Displacement at lab level (0 confirmed)
- Whether an institute *bought* or merely accessed a platform
- Anything before 2024 — the corpus starts there

METHOD, IN ONE PARAGRAPH

Europe PMC full text was parsed for methods sections; platform names were matched against a curated catalogue of 123 products and 366 aliases, then quote-anchored and labelled by deterministic rules. This cut keeps only the verified tier (y) and hand-checks every row shown. Computational papers that reuse public data were removed manually — the automated rules cannot yet tell “we ran a Xenium” from “we downloaded a Xenium dataset”, and that is the largest remaining precision risk in the pipeline.

Known limits: 93 papers is a demo, not a market. Precision on the verified tier is 100% on 36 human-labelled rows — small-n. Institution names are as printed; no ROR resolution yet. A paper can lag a purchase by 1–3 years. Publication is not ownership. Figures are counts, not currency.