

**EXCLUSIVE  
PREVIEW  
& ORDER  
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# **HEALTHCARE MOVERS GERMANY REPORT // 2020**

*The Land of the Hidden Digital  
Healthcare Champions*

# FOREWORD FROM THE AUTHORS

In this study, the **HEALTHCARE MOVER 2020 – GERMANY REPORT** we aimed to provide an unbiased understanding of how the German healthcare industries digitally transformed their offerings and how it compares to international peers.

This report is the first large scale cross-industry examination of the status of digitalized offerings of healthcare players regardless of their size and age. It is unique compared to existing international studies that typically focus on only one sector or a few sub-segments of a sector. It is a neutral, qualitative assessment of the digital transformation dynamics in both German and international healthcare industries across all product categories and it shows how the latest digital technologies are used.

We accepted this challenge and describe how companies become digital champions by deploying novel **data acquisition approaches**, utilizing **next-level technologies** early on, and by developing innovative **data-driven business models**. Such players aspire to influence therapeutic processes across the entire patient pathway and become leaders in the digital transformation of healthcare. We call them the "Healthcare Movers" (or HCM).



**Günther Illert**  
Founder of the network



**Beatus Hofrichter**  
Founder & CEO



**Dr. Ursula Kramer**  
CEO



In total, more than 2'000 companies based in Germany were benchmarked against over 7,800 companies located in Austria, Canada, Denmark, Finland, France, Ireland, Norway, Sweden, Switzerland, the United Kingdom, and the USA. In short, our analysis revealed **715 German**, internationally competitive healthcare industry stakeholders, achieving a formidable 2nd place in a ranking of the 11 key markets we assessed. The research also helped to identify **168 hidden champions** – the German HCM Avant-Garde – and make them visible for the first time.

We believe that the potential for growth by digitalizing the offering is immense.

The complete report provides you with a sound understanding of the status of digital transformation of German healthcare industry stakeholders.

**Order the full report or engage with us** for numerous unique findings and novel benchmarks, providing you with clear insights and best practice examples on segments, company size and age, sectors, and regions.

**SHORT CUT**

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# THE HCM REPORT // WHAT TO EXPECT

The HCM report contains high levels of insights and details

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**HCM // Three Decisive Strategic Levers**

### HEALTHCARE MOVERS (HCM) DEPLOY THREE DECISIVE STRATEGIC LEVERS

**REIMBURSEMENT-CENTRIC FOCUS** vs **TOTAL VALUE OUTCOME-CENTRIC FOCUS**

**OUR KEY HYPOTHESES:**  
The success of digital transformation in healthcare depends on three strategic levers: reimbursement, total value outcome, and data acquisition.

**DATA ACQUISITION ACROSS THE FOUR HEALTHCARE DATA DOMAINS**

**01 HCM // Three Decisive Strategic Levers**

**02 MEASURING BUSINESS MODEL RESILIENCE**

**03 WHAT DISTINGUISHES HEALTHCARE MOVERS?**

**01 HCM // Three Decisive Strategic Levers**

**02 MEASURING BUSINESS MODEL RESILIENCE**

**03 WHAT DISTINGUISHES HEALTHCARE MOVERS?**

**DIAGNOSTIC AT THE POINT OF CARE – THE MISSING LINK IN DIGITIZATION**

Portrait // Michael Deibold

Michael Deibold is the CEO of the German Health Insurance Association (GKV) and has been responsible for the digitalization of the German healthcare system for over 10 years.

**MASTERING THE DIGITAL TRANSFORMATION CHALLENGES**

**03 DIGITAL TRANSFORMATION // Mastering challenges**

Today, stakeholders are expected to react to a multitude of changes brought by digital technologies. This includes the industry and healthcare providers, but also the patients, who are becoming more empowered and demanding.

**FOOD FOR THOUGHT**

We invite you to take a few minutes and reflect on the following five questions:

1. What do you have thought a year ago, that is no longer relevant today?
2. How do you see high-quality research & development going forward in the industry, and what are the key challenges?
3. Are your company's offerings still your main focus for digital transformation?
4. Which innovation will be most important for your company in the next 5 years?
5. Which innovation will be most important for your company in the next 10 years?

**Includes more than 25 graphs and benchmark tables**

**Holistic Integrator' Hotspots**

**'Advanced ICT' Hotspots**

**7 portraits of digital champions**

Portrait // Mark Schmitt

Mark Schmitt is the CEO of the German Health Insurance Association (GKV) and has been responsible for the digitalization of the German healthcare system for over 10 years.

**TELEKOM HEALTHCARE SOLUTIONS RANKS 14<sup>TH</sup> IN THE HCM 2020 BENCHMARK**

Portrait // Mark Schmitt

Mark Schmitt is the CEO of the German Health Insurance Association (GKV) and has been responsible for the digitalization of the German healthcare system for over 10 years.

**TELEMEDICINE AND VIDEO CONSULTATION ARE CURRENTLY BEING HYPED BY CORONA. THE ISSUE NOW IS TO REALIZE SUSTAINABLE IMPLEMENTATION.**

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