ISG Provider Lens™

Healthcare Digital Services

Germany 2021

A research report comparing provider strengths, challenges and competitive differentiators

Quadrant Report

Customized report courtesy of:

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About this Report

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The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of September 2021, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars ($US) unless noted.

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ISG Provider Lens™

ISG Provider Lens™

ISG Provider Lens™ delivers leading-edge and actionable research studies, reports and consulting services focused on technology and service providers' strengths and weaknesses and how they are positioned relative to their peers in the market. These reports provide influential insights accessed by our large pool of advisors who are actively advising outsourcing deals as well as large numbers of ISG enterprise clients who are potential outsourcers.

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EXECUTIVE SUMMARY

The Covid-19 Crisis and the Legislature Create Push for Digitalization in German Healthcare System

- The COVID-19 pandemic continues to keep the German healthcare system on its edge. The longer the crisis lasts, the more it exposes various weaknesses among healthcare vendors, especially in hospitals given a shortage of staff. These challenges further drive the transformation to digitalized processes and services and subsequently accelerate digitalization in the German healthcare system.
- In the wake of the pandemic, increasing efficiency has become a priority of those responsible for IT at healthcare vendors and payers in Germany. Other goals on the agenda include cost reduction, better client and patient service, optimized patient care, support for medical diagnoses, an expanded telemedicine practice, and improved medical care for rural areas in the long term.
- A certain set of different digitalization solutions such as systems based on AI, solutions for automation, and the provision of resources from the cloud helps achieve these goals. The latter focuses on addressing specific challenges faced by CIOs and vendors of digitalization solutions in the healthcare sector. With healthcare In Germany being a highly regulated industry, service vendors should demonstrate comprehensive technical knowledge as well as industry expertise and compliance to statutory regulations. Data protection, especially for patient data, is pertinent in terms of storing and distributing information on cloud platforms while strictly adherencing to statutory restrictions.
- At the same time, the legislature has a stimulating effect on the demand for digitalization solutions in the healthcare market. Two examples can be cited: electronic patient files have been mandatory in Germany since January 2021 and the German Hospital Future Act is intended to imcrease the digitalization of hospitals. Both government measures offer market opportunities for specialized service vendors.

COVID-19, Efficiency Pressures and Staff Shortages Drive Demand for Provider Digital Transformation Services

- Despite the ongoing vaccination activities, the German healthcare system is still reeling from the COVID-19 crisis. With the overloading of the health system, its weak points have become particularly apparent. Simple processes have reached their limits as the capacity of the health system has been exhausted in the course of the crisis. Many healthcare organizations have yet to implement meaningful measures for digitalization. The necessary increase in efficiency, for example through automation, is now a focus area. This will also help address the paucity of skilled workers particularly during the crisis. The shortage of staff for networking is currently a driving factor for digitalization. Even as resources are cut down, the German Hospital Future Act is intended to compensate for the digitalization backlog.

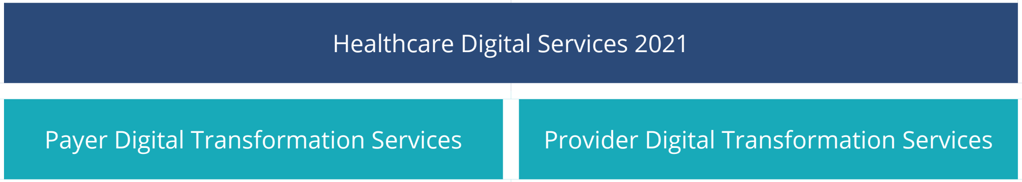
- In spite of these challenges, the German healthcare system is being digitized at a rapid pace. Vendors of digital transformation services benefit by offering a diversity of digitalization approaches and services. Expansive industry knowledge and business and IT-related consulting competencies will help drive success in this market.
- Seven vendors have been positioned as leaders of digital transformation services in Germany for this study. These include Accenture, Atos, CANCOM, Cognizant, Deutsche Telekom (Telekom Healthcare Solutions), DXC Technology and IBM.

The Legislature Influences the Market for Payer Digital Transformation Services

- Payers in the German healthcare system have a higher level of digitalization than healthcare vendors. At the same time, private health insurers are more advanced than federal health insurance companies. One of the reasons is the pressure to help private health insurers achieve efficiency, primarily among public limited companies compared to federal health insurance companies. In both segments, competition contributes to coercive digitalization for increased efficiency and improved client service. The demand of private health insurers and federal health insurance companies for digitalization services is also driven by the electronic patient file – a statutory mandate since early 2021. At the same time, there is large scope for digitalizing many processes that are still paper based.
- However, statutory regulations on the protection of patient data are an inhibiting factor for digitalization projects. Such regulations should be taken into account by digitalization vendors in their services targeting payers in Germany. In addition to the high demand for IT experts and a broad portfolio for payer digital transformation services, experts for sector-specific requirements and regulations are required.
- Five vendors were positioned as leaders of payer digital transformation services in Germany for this study. These include Accenture, Atos, CANCOM, Deutsche Telekom (TSI) and IBM.

Introduction

Simplified illustration



Source: ISG 2021

Definition

The healthcare industry is under pressure to change. In the wake of the COVID-19 pandemic and the public demand for more effective results, rapid actions are required to improve care and build patient-centerd business models. All segments of the industry are being forced to comply with new regulations and adapt to the needs of an ageing population. Consumers also expect an advanced and convenient supply of digital services. At the same time, many companies are facing competitive pressure to keep up with the growing market demand.

New business approaches are gaining a grip, and regulatory hurdles and cost pressures are higher than before. The competitive landscape has also never been as dynamic and global as it is currently. Innovation is thus necessary.

Definition (cont.)

In Germany, the German Hospital Future Act and the electronic patient record bring both challenges and opportunities for the healthcare industry and its service vendors.

Successful healthcare organizations have addressed these challenges with the following measures:

- Targeted investments and continual cost controls
- Deployment of advanced technology and digital operating models
- Focus on improving and innovative patient engagement
- Constructing and improving data exchange solutions
- Switching over to digital platforms for rapid modernization and adaptation to the changing healthcare environment

Several current and expected challenges faced by the industry can be overcome by digital transformation. Both payers and vendors are increasingly using digital transformation services to evolve and better serve their target groups in Germany. Payers are shifting their focus from investment decisions to business outcomes, making finance departments and other specialization areas in charge of digital transformation. Some companies are taking their own initiatives, while others use business process-as-a-service (BPaaS) solutions.

Service vendors that are examined in Healthcare Digital Services 2021 study are assessed on their efficiency of their actions and involvement in the development of blueprints, architecture frameworks and management processes. Their knowledge of specific statutory regulations in Germany is also important. Other criteria include company awareness, market reach and number of clients. In addition, they are assessed on the basis of threshold values regarding annual revenues, the number of specialist staff employed and R&D expenditure.

Further assessments include how effectively they act as an extension of a client's technology organization and are involved in the creation of blueprints, architecture frameworks and management processes. They are also assessed on factors such as brand awareness in the markets studied, market reach, and number and quality of clients. Other criteria include thresholds for annual revenue, number of assigned staff/expertise and R&D investment.

Definition (cont.)

The ISG Vendor Lens™ study provides IT decision makers with:

- A presentation of the strengths and weaknesses of the relevant vendors
- A differentiated positioning of vendors based on competitive strength and portfolio attractiveness
- A view of multiple markets, including global, U.S. and Germany

The study thus provides an essential decision-making basis for positioning, relationship and go-to-market considerations. ISG advisors and corporate clients also use information from these reports to evaluate their current and potential new vendor relationships.

Scope of the Report

This report covers healthcare digital services in Germany to two topics presented below:

Payer Digital Transformation Services:

This quadrant assesses the performance of vendors offering digital transformation services for payers, including statutory health insurers and private health insurers. Digital transformation services support payers in their increasing dependence on digital paths for better patient care.

Provider Digital Transformation Services:

This section covers digital transformation services for healthcare vendors, such as hospital and independent healthcare vendors, with responsibility for processes and systems that take care of patient relationships and patient care.

Provider Classifications

The provider position reflects the suitability of IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions IT providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between US$20 million and US$999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above US$1 billion, with activities worldwide and globally distributed decision-making structures.

Provider Classifications

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly.

Leader

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Product Challenger

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Market Challenger

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

Contender

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in both products and services and a sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star. Number of providers in each quadrant: ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

Rising Star

Rising Stars have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not In

The service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

Healthcare Digital Services - Quadrant Provider Listing 1 of 3

	Payer Digital Transformation Services	Provider Digital Transformation Services
Accenture	Leader	Leader
Agfa HealthCare	Not In	Contender
Arvato Systems	Not In	Product Challenger
Atos	Leader	Leader
Bechtle	Not In	Market Challenger
Birlasoft	Not In	Product Challenger
Bitmarck	Market Challenger	Not In
CANCOM	Leader	Leader
CGI	Product Challenger	Product Challenger
Cognizant	Not In	Leader

Healthcare Digital Services - Quadrant Provider Listing 2 of 3

	Payer Digital Transformation Services	Provider Digital Transformation Services
Computacenter	Market Challenger	Market Challenger
Deloitte	Product Challenger	Product Challenger
Deutsche Telekom (Telekom Healthcare Solutions)	Not In	Leader
Deutsche Telekom (TSI)	Leader	Not In
DXC	Product Challenger	Leader
EPAM	Product Challenger	Not In
gkv informatik	Market Challenger	Not In
Harman	Product Challenger	Product Challenger
IBM	Leader	Leader
ITSCare	Market Challenger	Not In

Healthcare Digital Services - Quadrant Provider Listing 3 of 3

	Payer Digital Transformation Services	Provider Digital Transformation Services
Mphasis	Not In	Contender
Persistent Systems	Product Challenger	Not In
Philips	Not In	Contender
Siemens Healthineers	Not In	Market Challenger
SoftwareONE	Not In	Contender
Unisys	Not In	Contender
Virtusa	Contender	Product Challenger

Healthcare Digital Services Quadrants

ENTERPRISE CONTEXT

Provider Digital Transformation Services

This report is relevant to healthcare providers in Germany for evaluating suppliers of digital transformation services.

In this quadrant report, ISG highlights the current market positioning of providers offering digital transformation services to healthcare providers in Germany and how each one addresses the key challenges faced in the region.

Digitization of the healthcare sector has not spread evenly or taken place simultaneously around the globe, even though the trend itself is universal. This report gives insights into how smart healthcare will develop in Germany, one of the most important countries in the global market. The pandemic has driven a rapid progression of technology innovation and patient expectations.

In Germany, digitization of data has a significant impact on value creation for inpatient hospitals and outpatient general practitioners (GPs). The switch to paperless data is likely to have the greatest impact, closely followed by online interaction, smart healthcare diagnosis solutions and workflow/automation and outcome transparency. Due to the pandemic, enterprises are also seeking digital transformation services related to smart healthcare diagnosis solutions, back-end operation solutions, augmented reality (AR) and virtual reality (VR) to make timely and informed decisions.

Enterprises are looking for trustworthy and committed partners that can address the challenges and provide a roadmap for setting up an optimal IT infrastructure.

Healthcare professionals and IT and technology leaders should read this report to understand the relative positioning and capabilities of providers that can help them effectively plan and select the appropriate services and solutions. The report also shows how the technical and integration capabilities of a service provider compare with others in the market.

Digital transformation professionals should read this report to understand how these suppliers fit their digital transformation initiatives and how they compare with one another.

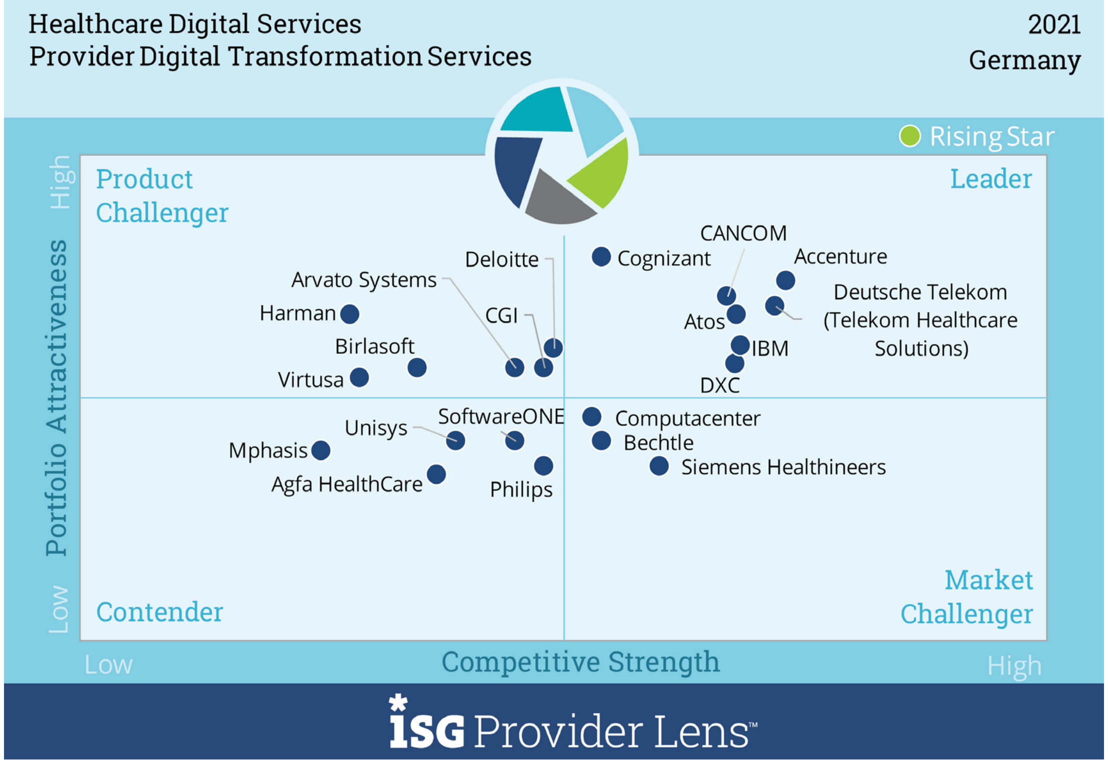
Government, procurement and vendor management professionals should read this report to develop a better understanding of the current landscape of providers offering digital transformation services to healthcare providers in Germany.

Security and sales leaders should read this report to see how service providers address the significant challenges of compliance and security without compromising the patient experience.

PROVIDER DIGITAL RANSFORMATION SERVICES

Observations

Despite ongoing vaccination drives, the healthcare system globally is still struggling to contain the transmission of COVID-19 and has been subsequently pushed to the brink of low performance in several areas. Furthermore, weak points that were not evident in normal operations have been showing up. For instance, telemedicine has made slow progress in Germany and should be expanded to better comply with social distancing norms as well as for medical therapy. Furthermore, analog processes have now become a stumbling block given the pressure to increase efficiency. Service providers and vendors have thus shifted their focus to automation to sustain their financial resources and address a shortage of healthcare staff. This has led to increased networking in intensive care units, allowing several patients to be monitored simultaneously by just one staff member.



Source: ISG Research 2021

PROVIDER DIGITAL RANSFORMATION SERVICES

Observations (cont.)

The German healthcare system is undergoing digitalization at an accelerated pace to address the crisis, even as the resources of the German Hospital Future Act are currently being underutilized. Vendors that offer a broad portfolio of digital transformation services have an advantage. Deep industry knowledge and business and IT-related consulting skills are also helpful to ensure success in this market.

For this quadrant, 21 companies were identified as relevant vendors in Germany. Cognizant has risen from the previous year's Rising Star to Leader. Seven were positioned as Leaders.

- **Accenture** combines its consulting competence with technical expertise in the healthcare sector. The close cooperation with clients also contributes to its strong market position.
- **Atos** is an innovative service vendor of hospital digitalization services with an aim to increase the efficiency of healthcare vendors.
- **CANCOM** has extensive in-house resources to offer a wide range of platforms and managed services. This has helped strengthen the company's positioning in the German market for health-care digitalization services.
- **Cognizant** has invested strongly in its market presence in Germany and has thus attained strides among the leaders for digitalization solutions for healthcare providers in Germany.
- **Deutsche Telekom (Telekom Healthcare Solutions)** distinguishes itself as an innovative and powerful specialist for the digitalization of healthcare in Germany. With its expanding client base, the company has gained a strong market position.
- **DXC Technology** has gained considerable trust in the German healthcare sector. The company has an extensive digitalization portfolio, deep industry experience and a strong commitment to clients.
- **IBM** distinguishes itself with its AI and cybersecurity competencies in the healthcare sector. The company is focused on expanding its capabilities in these areas.

ENTERPRISE CONTEXT

Payer Digital Transformation Services

This report is relevant to healthcare payer enterprises in Germany for evaluating providers offering digital transformation services such as back-office automation services and enhanced customer service.

In this quadrant report, ISG highlights the current market positioning of service providers that offer digital transformation services to healthcare payer enterprises in Germany and how each provider addresses the key challenges faced in the region.

It is extensively known that healthcare lags other industries in the implementation of digital technology due to regulatory and privacy barriers. However, the COVID-19 outbreak has forced healthcare payers and regulators to develop provisional solutions that streamline a swift adoption of digital technologies.

Regular regulatory changes, peaks and valleys in claims volume and healthcare innovations have a substantial influence on the industry. With such challenges, health insurers are constantly on the lookout for areas where they can optimize. Digital technologies such as robotic process automation (RPA) and artificial intelligence (AI) have opened a wide range of opportunities for payers to achieve unprecedented levels of efficiency and improve customer engagement. Applying intelligent automation to claims processing is one of the strongest levers that payers can pull to achieve unprecedented levels of operational efficiencies and drive down costs.

Healthcare payers seek trustworthy and committed partners that can address the challenges and provide a roadmap for digital transformation services.

Healthcare payers and IT and technology leaders should read this report to understand the relative positioning and capabilities of providers and thus effectively plan and select the healthcare payer-related services and solutions. The report also shows how the technical and integration capabilities of a service provider compare with the rest in the market.

Digital transformation professionals should read this report to understand how these service providers fit their digital transformation initiatives and how they compare with one another.

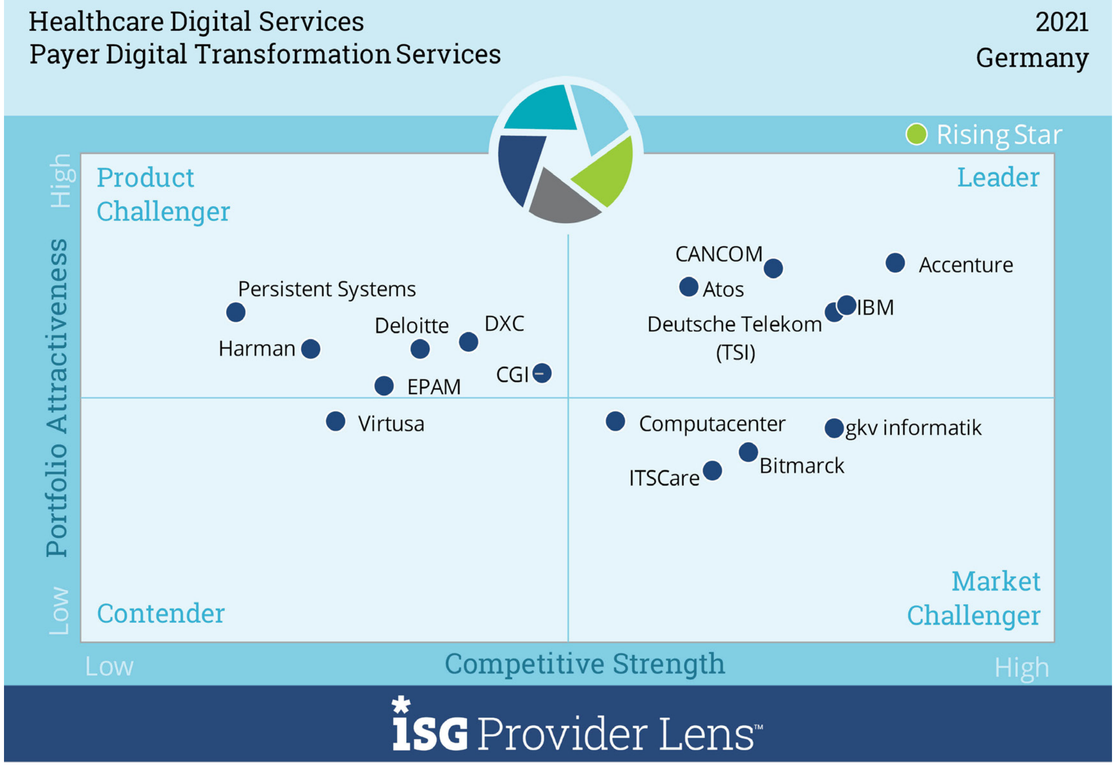
Government, procurement and vendor management professionals should read this report to develop a better understanding of the current landscape of providers offering digital transformation for healthcare payers in Germany.

Security and sales leaders should read this report to see how service providers address the significant challenges of compliance and security without compromising patient privacy and experience.

PAYER DIGITAL TRANSFORMATION SERVICES

Observations

In Germany, the demand for payer digital transformation services typically comes from payers of the healthcare system, includingstatutory health insurance funds (primarily Allgemeine Ortskrankenkassen, Ersatzkassen, and Betriebskrankenkassen) and private health insurers. Payers are already advanced in terms of digitalization compared to healthcare vendors, while private health insurers usually have a higher level of digital maturity than health insurers. Private health insurers are typically stock corporations that ensure optimum cost structures and high efficiency in the interests of maximizing dividends. However, competition in terms of cost for the insured (premiums or additional contributions) and services forces not only federal health insurers but also private health insurance companies to increase efficiency and improve client service. The quest for efficiency gains is driving the



Source: ISG Research 2021

PAYER DIGITAL TRANSFORMATION SERVICES

Observations (cont.)

demand from federal health insurers and private health insurance companies for digitalization services. In addition, the legislature is also bringing about increased digitalization measures. On January 1, 2021, electronic patient records were made mandatory for all federal health insurers and private health insurance companies in Germany. There is still significant scope for the digitalization of many processes that are still paper based.

At the same time, special restrictions imposed on the industry by statutory requirements, particularly regulations on patient data protection, should be taken into account for digitalization projects. This is why the market for payer digital transformation services does not merely require IT experts with a broad portfolio of one-stop solutions, but also experts in industry specific requirements and regulations.

For this quadrant, 16 companies were identified as relevant vendors with fiveof them positioned as Leaders.

- **Accenture** provides secure cloud solutions and combines sound consulting with a broad services portfolio and a prospective approach for healthcare payers.
- **Atos** supports clients with its local presence and international experience. The company also distinguishes itself with its comprehensive services and focus on sustainability.
- **CANCOM** offers a comprehensive portfolio through a strong partnership network. It also enables local delivery and operations from a single source. The company leverages this capability to expand its client base in the German healthcare sector.
- **Deutsche Telekom (TSI)** has a large base of renowned clients. This is primarily attributed to its in-depth knowledge of digitalization platforms and proposal of innovative digitalization solutions together with associated connectivity from a single source.
- **IBM** distinguishes itself through its commitment to electronic health records and focus on data security. The company leverages its strong AI capabilities to present itself as a digitalization service vendor for payers in the healthcare sector.

DEUTSCHE TELEKOM (TSI)

Overview

Deutsche Telekom (TSI) is a German service vendor of IT technology. The company is part of Deutsche Telekom AG and is headquartered in Frankfurt am Main. It generated external revenue (excluding services for the Deutsche Telekom Group) of €4.2 billion in 2020 with about 29,000 employees. Digitalization is a core element of the portfolio. The company also a dedicated portfolio for healthcare that covers cost units.

Strengths

Extensive and profound knowledge of digitalization products and platforms: Deutsche Telekom's (TSI) consulting offering for healthcare payers provides know-how for many platforms. The neutrality of the offering is an important factor for many clients and is ensured by the large partner ecosystem and in-depth product expertise of consultants.

Goal-oriented solutions with a prospective approach: In addition to an extensive classic IT service portfolio, Deutsche Telekom (TSI) supports clients from the payer market segment with innovative solutions. For example, machine learning is used to better identify and analyze trends or to optimize preventive measures. Improving client service is another example: telephone queues are better managed with the help of improved voice recognition.

Well-known reference clients: Deutsche Telekom's (TSI) references include Barmer Ersatzkasse, one of Germany's largest health insurers, and Barmenia.

Digitalization and connectivity from a single source: As an expert in communications and networks, Deutsche Telekom (TSI) provides its clients with the appropriate infrastructure, together with the networked digitalization solutions from a single source.

Caution

Recently, there have been several public reports about a possible sale of Deutsche Telekom (TSI). This may agitate clients and interested parties.

2021 ISG Provider Lens™ Leader

Deutsche Telekom (TSI) has profound knowledge of digitalization platforms and offers innovative digitalization solutions together with related connectivity from a single source.

Methodology

METHODOLOGY

The research study "ISG Provider Lens™ 2021 – Healthcare Digital Services 2021" analyzes the relevant software vendors/service providers in the German market, based on a multi-phased research and analysis process. It positions these providers using ISG Research methodology.

The study was divided into the following steps:

1. Definition of the Healthcare market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Use of ISG's internal databases and advisor knowledge and experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts and figures received from providers and other sources.
6. Use of the following key evaluation criteria:
   - Strategy & vision
   - Innovation
   - Brand awareness and presence in the market
   - Sales and partner landscape
   - Breadth and depth of portfolio of services offered
   - Technology advancements

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Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor. Now as a research director, principal analyst and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

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