



*Software providers
in the outpatient
healthcare market*

Development since 2016

— OUT OF THE ORDINARY

Key Highlights

Willingness to change

Compared to the inpatient sector, there is a significantly higher willingness to change systems in the outpatient sector.

Dynamic growth

Despite a decline in the number of medical practices, the top five providers are growing by up to 90% annually.

Psychotherapy market growing

The number of psychotherapy practices rose by over 50% between 2013 and 2022. Specialised software providers Epikur and Hasomed are benefiting particularly from this.

Established solutions under pressure

While the market is growing, established providers are losing ground: CompuGroup and medatixx recorded declines of 21.9% and 8%, respectively, in the period under review.

Specialized providers on the road to success

Specialized systems such as Medavis (radiology) and FIDUS (ophthalmology) are growing strongly – despite high barriers to change due to complex integrations.











Acquisitions drive software change

The increasing sale of practices, whether to individuals or groups, is leading to more changes in practice management software.











Consolidation activities among practice networks

In industries with intensive takeover activity, the leading providers are benefiting particularly from market concentration.











Ranking of providers (1/4)

#	Company	Installations 2016	Installations 2022	CAGR	Trend
1	 T 2 M E D	43	1,951	88.9%	⬆️
2		76	551	39.1%	⬆️
3		371	2,163	34.2%	⬆️
4	 the MEDICAL OFFICE company	1,832	5,107	18.6%	⬆️
5		2,265	4,894	13.7%	⬆️
6	 an IQVIA business	499	1,005	12.4%	⬆️
7	 new media company	2,916	4,266	6.5%	⬆️
8		172	229	4.9%	➡️
9	 Praxis. Therapie. Sicherheit.	8,666	10,999	4.1%	➡️
10		148	173	2.6%	➡️










Ranking of providers (2/4)

#	Company	Installations 2016	Installations 2022	CAGR	Trend
11	 PegaMed	819	947	2.4%	→
12	 T Healthcare Solutions	900	1,030	2.3%	→
13	 F I D U S	472	515	1.5%	→
14	 psyprax	10,328	10,974	1.0%	→
15	 EVIDENT Software für 18 ... 48	688	730	1.0%	→
16	 Meierhofer	280	296	0.9%	→
17	 duria	1,915	1,951	0.3%	→
18	 KIND	221	224	0.2%	→
19	 SAP	1,434	1,436	0.0%	→
20	 SOFTLAND	1,653	1,650	0.0%	→

Ranking of providers (3/4)

#	Company	Installations 2016	Installations 2022	CAGR	Trend
21	 medisoftware	726	706	-0.5%	→
22	 DAMP SOFT	81	78	-0.6%	→
23	 medVISION Medical Software Solutions	409	390	-0.8%	→
24	 Data-AL	1,028	954	-1.2%	→
25	 medatix	19,831	18,248	-1.4%	→
26	 KfH	255	228	-1.8%	→
27	 abasoft Praxissoftware für Arztpraxen und MÜZ	555	489	-2.1%	↓
28	 nexus/ag	1,246	1,087	-2.2%	↓
29	 ergosoft	2,080	1,796	-2.4%	↓
30	 bender gruppe medigration	82	70	-2.6%	↓

Ranking of providers (4/4)

#	Company	Installations 2016	Installations 2022	CAGR	Trend
31		5,720	4,664	-3.3%	⬇️
32		876	698	-3.7%	⬇️
33		38,474	30,037	-4.0%	⬇️
34		232	181	-4.1%	⬇️
35		790	559	-5.6%	⬇️
36		106	75	-5.6%	⬇️
37		1,039	675	-6.9%	⬇️
38		545	247	-12.4%	⬇️
39		1,602	175	-30.9%	⬇️

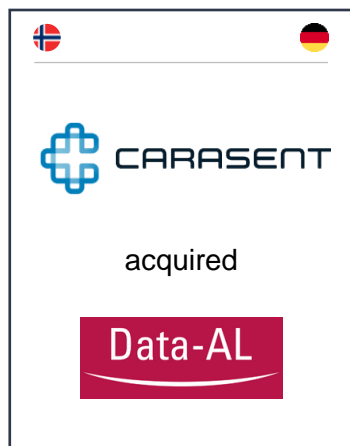
*Nexus Gruppe (Nexus AG, NEXUS Digital Pathology GmbH, Nexus / Chili GmbH, Nexus Swisslab GmbH, ifa Systems AG)

*Frey Gruppe (Frey ADV GmbH, InterData Praxis-Computer GmbH, S3 Praxiscomputer GmbH)

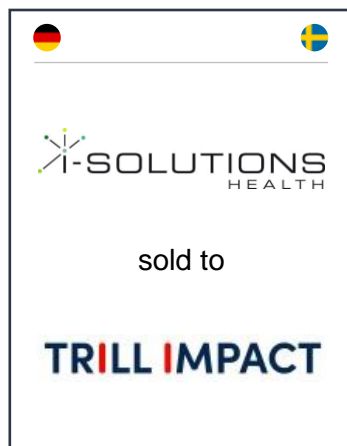
*CompuGroup (Z1, MEDISTAR, TURBOMED, ALBIS, CGM M1 PRO, DATA VITAL, CGM SOUL)

For better comparability, the installations of the groups as they exist in 2023 were also totalled for the year 2016.

References and Senior Team



Healthcare software



Healthcare software



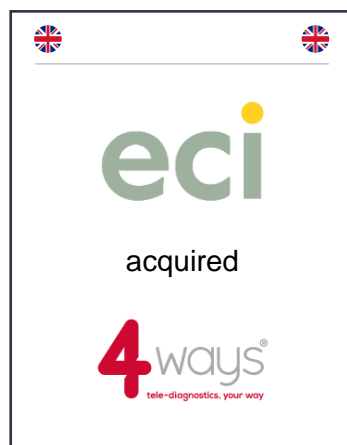
Pharmacometrics



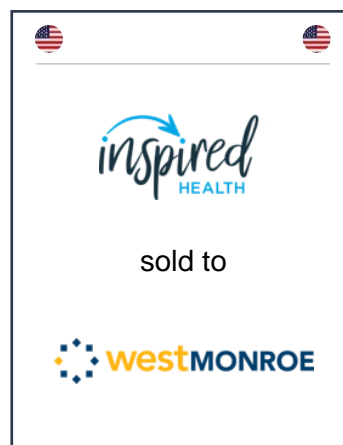
Healthcare technology services



Healthcare services



Tele-diagnostics company



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Thank you

