



## Healthcare Provider Digital Services PEAK Matrix<sup>®</sup> Assessment 2020

Healthcare IT Services

Market Report – June 2020: Complimentary Abstract / Table of Contents

# Our research offerings for global services

▶ Market Vista™ Global services tracking across functions, sourcing models, locations, and service providers – industry tracking reports also available	
▶ Application Services	▶ Human Resources
▶ BPS   Banking & Financial Services	▶ ITS   Banking & Financial Services
▶ BPS   Healthcare & Life Sciences	▶ ITS   Healthcare
▶ BPS   Insurance	▶ ITS   Insurance
▶ Catalyst™	▶ IT Services Executive Insights™
▶ Cloud & Infrastructure	▶ ITS   Life Sciences
▶ Customer Experience Management Services	▶ Locations Insider™
▶ Data & Analytics	▶ PricePoint™
▶ Digital Services	▶ Procurement
▶ Engineering Services	▶ Recruitment & Talent Acquisition
▶ Enterprise Platform Services	▶ Service Optimization Technologies
▶ Finance & Accounting	

## More about membership

In addition to a suite of published research, a membership may include

- Accelerators™
- Analyst access
- Data cuts
- Pinnacle Model® reports
- PriceBook
- Virtual Roundtables
- Workshops

## Custom research capabilities

- Benchmarking | Pricing, delivery model, skill portfolio
- Peer analysis | Scope, sourcing models, locations
- Locations | Cost, skills, sustainability, portfolio – plus a tracking tool
- Tracking services | Service providers, locations, risk
- Other | Market intelligence, service provider capabilities, technologies, contract assessment

## Membership information

- This report is included in the following research program(s)
  - [Healthcare IT Services](#)
- If you want to learn whether your organization has a membership agreement or request information on pricing and membership options, please contact us at [info@everestgrp.com](mailto:info@everestgrp.com)

# Table of contents (page 1 of 2)

Topic	Page no.
<b>Introduction and overview</b>	<b>5</b>
<b>Summary of key messages</b>	<b>11</b>
<b>Section I: Provider digital services market update</b>	<b>14</b>
• Provider digital services market size and growth	14
• Service provider revenue and growth rate	21
• Provider digital services demand themes	23
• Adoption challenges	33
• COVID-19 impact	36
<b>Section II: PEAK Matrix® for healthcare provider digital services</b>	<b>39</b>
• PEAK Matrix® framework	40
• PEAK Matrix® for healthcare provider digital services	43
• Healthcare provider digital services PEAK Matrix® characteristics	44
• Summary dashboard	46
<b>Section III: Everest Group’s remarks on service providers</b>	<b>51</b>
• Accenture	52
• Atos	53
• Capgemini	54
• CitiusTech	55
• Cognizant	56
• Deloitte	57

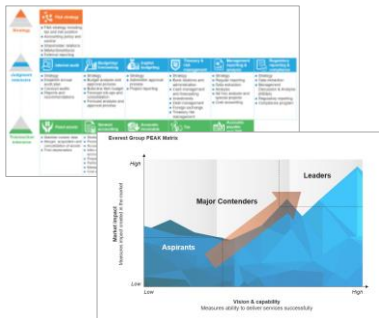
---

<b>Topic</b>	<b>Page no.</b>
<b>Section III: Everest Group’s remarks on service providers (continued)</b>	
• DXC Technology .....	58
• emids .....	59
• EPAM .....	60
• GAVS .....	61
• HCL Technologies .....	62
• Hexaware .....	63
• HTC Global Services .....	64
• IBM .....	65
• Infinite .....	66
• Infostretch .....	67
• NTT DATA .....	68
• Optum .....	69
• TCS .....	70
• Tech Mahindra .....	71
• Virtusa .....	72
• Wipro .....	73
<b>Appendix</b> .....	<b>74</b>
• Glossary of terms .....	75
• Research Calendar .....	76
• References .....	77

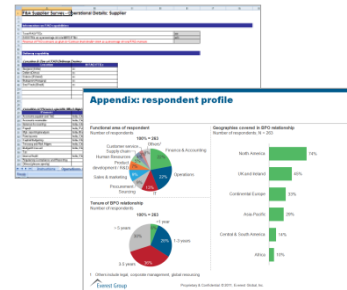
# Our research methodology is based on four pillars of strength to produce actionable and insightful research for the industry

- Market thought leadership
- Actionable and insightful research
- Syndicated and custom research deliverables

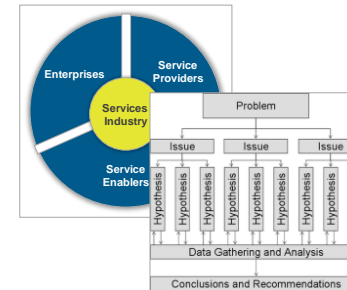
**1 Robust definitions and frameworks**  
PEAK Matrix®, market maturity, and technology adoption/investment



**2 Primary sources of information**  
Annual contractual & operational RFIs, service provider briefings & buyer interviews, and web-based surveys



**3 Diverse set of market touchpoints**  
Ongoing interactions across key stakeholders, input from a mix of perspectives and interests, supports both data analysis and thought leadership



**4 Fact-based research**  
Data-driven analysis with expert perspectives, trend analysis across market adoption, contracting, and service providers



- Proprietary contractual database of healthcare IT Services (ITS) contracts (updated annually)
- Round-the-year tracking of all major healthcare IT service providers and product vendors
- Dedicated team for healthcare outsourcing research, spread over two continents
- Over 20 years of experience in advising clients on ITS-related decisions
- Executive-level relationships with buyers, service providers, technology providers, and industry associations

# Background of the research

Healthcare providers have historically been mired down by the legacy IT estate and regulations that have had the unfortunate consequence of incentivizing them to maintain the status quo. However, that is not an option anymore, particularly as healthcare providers scramble to meet the unprecedented needs of a world disrupted by the COVID-19 pandemic. Healthcare providers are now being forced to jump on the digital bandwagon to meet the demands faced by the healthcare ecosystem to battle this outbreak.

To support enterprises on their digital journeys, service providers are ramping up capabilities through healthcare-specific partnerships and acquisitions. This, in turn, is driving the need for research and market intelligence on demand and supply trends in healthcare provider digital services. Everest Group's healthcare ITS research program addresses this market need by analyzing demand themes and service provider capabilities in healthcare provider digital services.

**In this report, we analyze the capabilities of 22 IT service providers specific to the healthcare provider sector globally. These service providers are mapped on the Everest Group PEAK Matrix®, which is a composite index of a range of distinct metrics related to a provider's capability and market impact. We focus on:**



**Provider digital services market size and growth**



**Digital services themes for healthcare providers**



**Assessment of the service providers on several capability- and market success-related dimensions**



**Everest Group's independent remarks on service providers**

## Scope of this report

- **Geography:** Global
- **Services:** Design services
- **Industry:** Healthcare provider

# Overview and abbreviated summary of key messages

This report examines the 2020 healthcare provider digital services provider landscape and its impact on the healthcare market. It focuses on service provider position and growth in the healthcare provider digital services market, changing market dynamics and emerging service provider trends, assessment of service provider delivery capabilities, and key healthcare provider digital services provider remarks

Some of the findings in this report, among others, are:

## Healthcare digital services market

- The overall healthcare provider digital services market is close to a US\$3 billion opportunity. The space is characterized by a combination of IT giants such as Accenture and Cognizant, healthcare specialists such as Optum, emids, and CitiusTech, and mid-sized firms such as Infinite and Infostretch
- Factors such as shift from a volume- to value-based care model, growing importance of customer-centricity, need for business efficiency and cost containment, and necessity for better collaboration amongst stakeholders explain the urgency shown by healthcare providers in adopting digital

## Emerging healthcare digital services trends

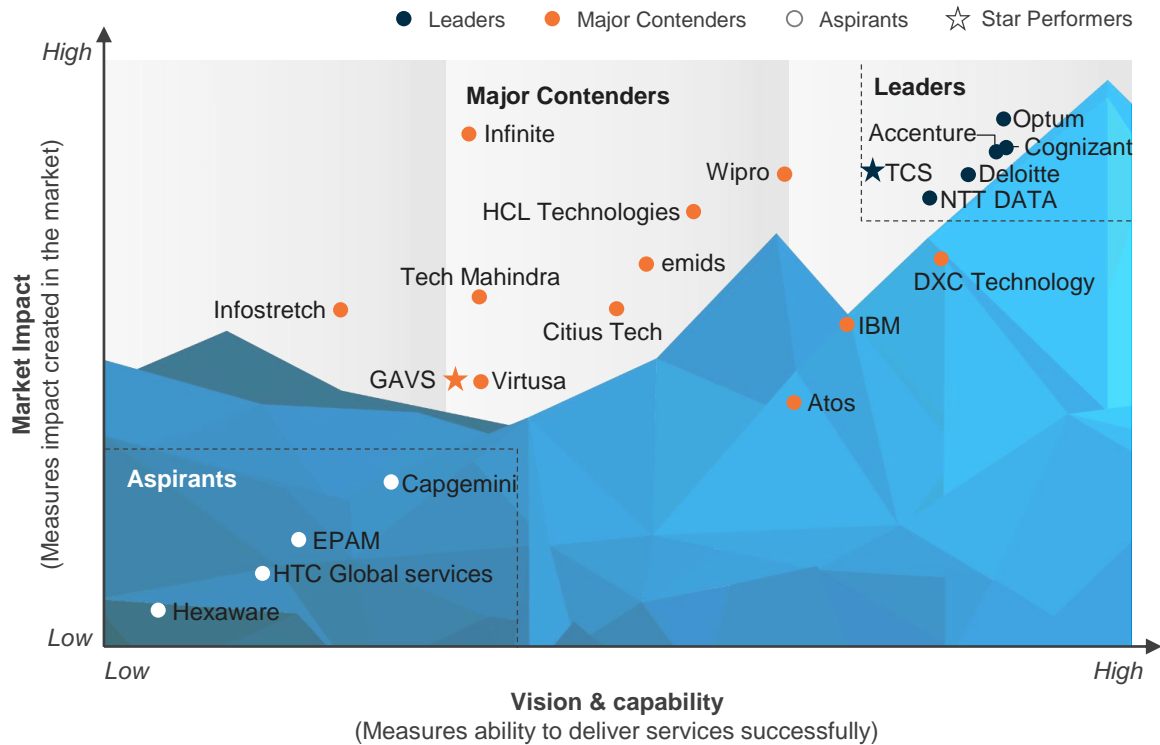
- Digital is gaining traction in the provider space to drive improved patient and clinician experiences, while optimizing resources and increasing efficiencies
- Healthcare providers are becoming increasingly data-reliant and leveraging data and analytics to manage data and derive insights
- A sharp increase in affinity to shift to cloud is evident in the provider landscape, driven by factors such as need for standardization and interoperability, rise in consumerism, and the need for scalability and flexibility
- There has been an uptick in the demand for telemedicine and telehealth to enable remote care management and better access to care

## Service provider delivery capability

- Healthcare digital services providers can be categorized into leaders, major contenders, aspirants, and star performers on a capability-market-share matrix
- Accenture, Cognizant, Deloitte, NTT DATA, Optum, and TCS are the current leaders in the healthcare provider digital services market. However, several service providers are emerging as major contenders

# This study offers distinct chapters providing a deep dive into key aspects of healthcare provider digital services market; the exhibits below illustrate the depth of the report

## Assessment of Healthcare Provider Digital Service Providers



- 1 PEAK Matrix specific to healthcare provider digital services
- 2 Assessments for Atos, Capgemini, Deloitte, EPAM, Hexaware, HTC Global Services and IBM excludes service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interactions with buyers

## Capability assessment

Illustrative example

Measure of capability: ● High ○ Low

Service provider	Market impact				Vision & capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
Service provider 1	●	●	●	●	●	●	●	●	●
Service provider 2	●	●	●	●	●	●	●	●	●
Service provider 3	●	●	●	●	●	●	●	●	●
Service provider 4	●	●	●	●	●	●	●	●	●
Service provider 5	●	●	●	●	●	●	●	●	●
Service provider 6	●	●	●	●	●	●	●	●	●
Service provider 7	●	●	●	●	●	●	●	●	●
Service provider 8	●	●	●	●	●	●	●	●	●
Service provider 9	●	●	●	●	●	●	●	●	●

## Everest Group's remarks on service providers

Illustrative example

Measure of capability: ● High ○ Low

Market impact				Vision & capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
●	●	●	●	●	●	●	●	●

### Strengths

- Service provider 1, has a robust delivery presence in Asia Pacific with multiple delivery centers in India, Australia, the Philippines, and China, enabling it to service client requirements efficiently
- It has a good number of multi-country as well as single-country clients across the world

### Areas of improvement

- Service provider 1 should increase offerings of value-added services such as employer branding, talent communities and workforce planning
- It should try to expand into larger multi-country deals and also scout for engagements in other Asia Pacific markets to strengthen its presence in the region



# Research calendar – Healthcare IT Services (ITS)

Published
  Planned
  Current release

## Flagship Healthcare ITS reports

### Release date

Healthcare Payer State of the Market – Key Trends, Service Provider Performance in 2019, and Outlook for 2020 .....	February 2020
Healthcare Provider State of the Market – Key Trends, Service Provider Performance in 2019, and Outlook for 2020 .....	March 2020
<b>Healthcare Provider Digital Services PEAK Matrix® Assessment 2020 .....</b>	<b>June 2020</b>
Healthcare Provider Digital Services – Service Provider Profile Compendium .....	Q3 2020
Salesforce Health Cloud Services PEAK Matrix® Assessment 2020 .....	Q3 2020
State of the Market – Salesforce Health Cloud services .....	Q3 2020
Salesforce Health Cloud Services – Service Provider Profile Compendium .....	Q3 2020
Healthcare Specialists PEAK Matrix® Assessment 2020 .....	Q3 2020
Healthcare Specialists – Service Provider Profile Compendium .....	Q4 2020

## Thematic Healthcare ITS reports

### Release date

Big Tech in Healthcare: What it Means for CIOs? .....	November 2019
A Platform-based Roadmap for Healthcare Payers .....	February 2020
Data Monetization in Healthcare .....	Q3 2020
Unpacking the Rise of Telehealth.....	Q3 2020
Adoption of Cloud EHR in Healthcare.....	Q3 2020
State of Payer Healthcare Platform.....	Q3 2020

Note: For a list of all our published Healthcare ITS reports, please refer to our [website page](#)

# Additional healthcare ITS research references

The following documents are recommended for additional insight into the topic covered in this report. The recommended documents either provide additional details or complementary content that may be of interest

1. **Healthcare Provider State of the Market – Trends, Service Provider Performance in 2019, and Outlook for 2020** ([EGR-2020-45-R-3587](#)); March 2020. Challenges such as increasing costs, regulatory changes, physician burnout and shortage, fragmented patient data, and dated IT infrastructure are plaguing the healthcare provider industry. Providers are being forced to reimagine existing models of care, improve outcomes, and adapt to the changing regulatory landscape. To address these challenges, providers have realized the indispensable need to adopt digital technologies. In this report, we lay out the emerging trends for 2020, examine existing trends in the healthcare provider space, and evaluate how these trends will impact providers' future decisions
2. **A Platform-based Roadmap for Healthcare Payers** ([EGR-2020-45-V-3561](#)); February 2020. The key trends defining the healthcare industry include a seminal shift to value-based care, rise in consumerism, and regulatory uncertainty. As the industry navigates these changes, it also has to struggle with challenges such as siloed operations, fragmented member data, and legacy IT estates. With the emergence of digitalization, payers are realizing the undeniable need to leverage IT advances to deliver better care outcomes and remain competitive. In this viewpoint, we showcase the current state of payers, the need to modernize, and the urgency of adopting an as-a-service IT platform model to enable true digital transformation. We assert that payers need to adopt this approach to help restructure their cost models and take a consumption-linked approach to modernization
3. **Healthcare IT Security Services PEAK Matrix® Assessment with Service Provider Landscape 2020** ([EGR-2019-45-R-3456](#)); December 2019. Healthcare challenges, such as changing business and care delivery models to support patient-centricity and consumerism, growing competition from both within and outside the industry, and increasing regulatory pressures, are leading to increased investments in data and technology by enterprises. Point-to-point upgrades, coupled with high technical debt levels, have increased security vulnerabilities to a large extent. The past few years have seen some of the biggest attacks on healthcare enterprises resulting in theft of millions of patient records. In this research, we present fact-based trends impacting the IT security services market, along with assessment and detailed profiles of 13 healthcare IT service providers featured on the healthcare IT security services PEAK Matrix

For more information on this and other research published by Everest Group, please contact us:

<b>Abhishek Singh</b> , Vice President:	<a href="mailto:abhishek.singh@everestgrp.com">abhishek.singh@everestgrp.com</a>
<b>Chunky Satija</b> , Practice Director:	<a href="mailto:chunky.satija@everestgrp.com">chunky.satija@everestgrp.com</a>
<b>Kanika Gupta</b> , Senior Analyst:	<a href="mailto:kanika.gupta@everestgrp.com">kanika.gupta@everestgrp.com</a>
<b>Priya Sahni</b> , Senior Analyst:	<a href="mailto:priya.sahni@everestgrp.com">priya.sahni@everestgrp.com</a>
<b>Abdul Rahman Shaikh</b> , Analyst:	<a href="mailto:abdul.shaikh@everestgrp.com">abdul.shaikh@everestgrp.com</a>

Website: [www.everestgrp.com](http://www.everestgrp.com) | Phone: +1-214-451-3000 | Email: [info@everestgrp.com](mailto:info@everestgrp.com)



## About Everest Group

Everest Group is a consulting and research firm focused on strategic IT, business services, and sourcing. We are trusted advisors to senior executives of leading enterprises, providers, and investors. Our firm helps clients improve operational and financial performance through a hands-on process that supports them in making well-informed decisions that deliver high-impact results and achieve sustained value. Our insight and guidance empower clients to improve organizational efficiency, effectiveness, agility, and responsiveness. What sets Everest Group apart is the integration of deep sourcing knowledge, problem-solving skills and original research. Details and in-depth content are available at [www.everestgrp.com](http://www.everestgrp.com).

### Dallas (Headquarters)

info@everestgrp.com  
+1-214-451-3000

### Bangalore

india@everestgrp.com  
+91-80-61463500

### Delhi

india@everestgrp.com  
+91-124-496-1000

### London

unitedkingdom@everestgrp.com  
+44-207-129-1318

### New York

info@everestgrp.com  
+1-646-805-4000

### Toronto

canada@everestgrp.com  
+1-416-388-6765

## Stay connected

### Website



[www.everestgrp.com](http://www.everestgrp.com)

### Social Media



@EverestGroup



@Everest Group

### Blog



[www.everestgrp.com/blog/](http://www.everestgrp.com/blog/)

*This document is for informational purposes only, and it is being provided "as is" and "as available" without any warranty of any kind, including any warranties of completeness, adequacy, or fitness for a particular purpose. Everest Group is not a legal or investment adviser; the contents of this document should not be construed as legal, tax, or investment advice. This document should not be used as a substitute for consultation with professional advisors, and Everest Group disclaims liability for any actions or decisions not to act that are taken as a result of any material in this publication.*