

Healthcare Payer Digital Services – Service Provider Compendium 2022

August 2022: Complimentary Abstract / Table of Contents



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- ▶ Digital Engineering Services
- ▶ Digital Services
- ▶ Digital Workplace
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Benchmarking

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Market intelligence

Tracking: providers, locations,
risk, technologies

Locations: costs, skills,
sustainability, portfolios

Contents

1. Introduction and overview	5
• Research methodology	6
• Key information on the report	7
• Background of the research	8
• Scope of the research	9
2. Healthcare Payer Digital Services PEAK Matrix® characteristics	10
• PEAK Matrix® framework	11
• Everest Group PEAK Matrix® for healthcare payer digital services	14
• Characteristics of Leaders, Major Contenders, Aspirants, and Star Performers	15
• Provider capability summary dashboard	17
3. Enterprise sourcing considerations	21
• Leaders	21
– Accenture	22
– Cognizant	26
– HCL	30
– Infosys	34
– NTT DATA	38
– Optum	42
– TCS	46
– Wipro	50
• Major Contenders	54
– Atos	55
– Capgemini	59

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

Abhishek Singh, Partner

Chunky Satija, Vice President

Kaushik Sundar, Senior Analyst

Contents

• Major Contenders (continued)	
– CitiusTech	63
– Conduent	67
– Emids	71
– EPAM	75
– IBM	79
– Infinite Computer Solutions	83
– Mindtree	87
– Mphasis	91
– Persistent Systems	95
– SoftServe	99
– UST	103
– Virtusa	107
• Aspirants	111
– Ascendum	112
– HTC Global Services	116
– Tech Mahindra	120
– Vee Technologies	124
4. Appendix	128
• Glossary	129
• Research calendar	130

Background of the research

Healthcare enterprises have made digital adoption the bedrock of their growth strategy to optimize processes, realize cost efficiencies, and enhance the member experience. With the healthcare industry evolving, enterprises are leveraging digital services to unlock prominent business use cases such as value-based care and population health management and to comply with changing regulations.

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

In this report, we present an assessment of 26 healthcare ITS providers. 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 payer digital services market size and growth, digital services themes for healthcare payers, assessment of the service providers on several capabilities and market success-related dimensions, and Everest Group's independent remarks on service providers.

This report features the following 26 leading service providers on the Healthcare Payer Digital Services PEAK Matrix®:

- **Leaders:** Accenture, Cognizant, Infosys, NTT DATA, Optum, TCS, and Wipro
- **Major Contenders:** Atos, Capgemini, Conduent, Emids, IBM, Infinite Computer Solutions, Mindtree, Mphasis, Persistent Systems, SoftServe, UST, and Virtusa
- **Aspirants:** Ascendum, HTC Global Services, Tech Mahindra, and Vee Technologies
- **Star Performers:** CitiusTech, EPAM, and HCL

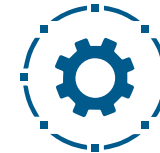
Scope of this report



Geography
Global (focus on the US)



Providers
Healthcare payer



Services
Digital services

Healthcare payer digital services | scope of the research

NOT EXHAUSTIVE



Digital use cases

- Process optimization
- Patient data security
- Better member satisfaction
- More member-focused plans
- Cost reduction
- Efficient claims management
- Better member engagement
- Workflow management, collaboration, and efficiency gains
- Allowing members to understand plans and make the right choices
- Better decision-making

Digital technologies

- RPA
- Internet of Things (IoT)
- Cognitive/AI
- Blockchain
- Analytics
- Cloud
- Social
- Mobility
- Digital cybersecurity

The healthcare payer digital services – service provider compendium report covers detailed profile of 26 vendors

Healthcare Payer Digital Services – Service Provider Compendium 2022

Provider | healthcare payer digital services profile (page 1 of 4)

Overview

Company mission/vision statement
 Provider's vision is to transcend from a services provider to a solutions partner for its healthcare payer customers, by bringing together technology, consulting, and health industry domain expertise for driving front, mid, and back-office transformation.

Healthcare payer digital services revenue

<US\$50 million US\$50-150 million >US\$150 million

Key partnerships

1 All the revenue components add up to a total of 100%

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Provider | healthcare payer digital services profile (page 2 of 4)

Key offerings

Proprietary solutions (representative list)

Solution name	Details
Payer-Provider Engagement solution	A solution that automates provider network management
Care management platform	A platform that supports risk stratification, population segmentation, and web channels
Intelligent Driver Payer	A claims optimization solution that streamlines claims management and identification
Payer-in-a-box solution	A solution that is offered in cloud to address the enterprise needs of payers and their stakeholders

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Provider | healthcare payer digital services profile (page 3 of 4)

Recent developments

Key events (representative list)

Development	Type	Year	Details
XXX	Investment	2022	Invested in XXX, a healthcare management, and connected platform
Databricks	Partnership	2020	Partnered with Databricks, the support use of the Databricks platform

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Provider | healthcare payer digital services profile (page 4 of 4)

Everest Group assessment – Major Contender

Measure of capability: 🕒 Low 🕒 High

Market impact				Vision & capability				
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services	Innovation & investments	Delivery footprint	Overall
🕒	🕒	🕒	🕒	🕒	🕒	🕒	🕒	🕒

Strengths

- Provider has made strategic investments in M&A, partnerships, and innovation labs to augment its AI/ML, cloud, IoT, and analytics capabilities
- It is placing strategic bets on key focus areas – value-based care, population health management, and virtual care
- It offers price flexibility to its clients by providing innovative price constructs such as outcome-based or risk-sharing models

Limitations

- While provider's resources are technically well-equipped, clients have cited the domain expertise of resources as a potential area of improvement
- It should focus on improving its talent management/attrition to ensure smooth delivery of services
- It should look to enhance its healthcare consulting capabilities to proactively identify and pitch growth opportunities to clients, and position itself as a strategic partner

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Research calendar

Healthcare Information Technology

■ Published
 ■ Planned
 ■ Current release

Reports title	Release date
Healthcare Provider Enterprise Insights – Q4 2020 & Q1 2021	August 2021
Interoperability in Healthcare	September 2021
Healthcare Payer Enterprise Insights – H1 2021	September 2021
Effective Claims Operations Through Scaled Digital Adoption	November 2021
Cloud for Healthcare – Data Platforms Peak Matrix® Assessment 2022	December 2021
Healthcare Payer Digital Services PEAK Matrix® Assessment 2022	May 2022
Healthcare Payer Digital Services – Service Provider Compendium 2022	August 2022
Cloud-based Core Administration Platform PEAK Matrix® Assessment 2022	Q3 2022
Member Engagement of the Future	Q3 2022
Cloud-based Core Administration Platform – Service Provider Compendium 2022	Q3 2022
Healthcare Provider Digital Services PEAK Matrix® Assessment 2022	Q3 2022
RCM Platforms PEAK Matrix® Assessment 2022	Q3 2022
Healthcare Customer Experience Platforms PEAK Matrix® Assessment 2022	Q3 2022
Risk Adjustment Solutions in Healthcare	Q3 2022
Importance of IT Security Amid Evolving Care Models	Q3 2022

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Blog

everestgrp.com/blog

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

Toronto

canada@everestgrp.com
+1-647-557-3475

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