Everest Group Healthcare Industry Cloud Services PEAK Matrix® Assessment 2024

Focus on Accenture

July 2024

Introduction

The healthcare industry is currently experiencing a significant increase in investments in cloud services to enable the implementation of use cases in key areas such as health data analytics, value-based care, population health, and interoperability. As healthcare enterprises embark on their next growth phase, industry cloud is expected to drive cloud spend among enterprises to future-proof the technology estate and rethink their value delivery to end-customers.

Although payers are still ahead of providers in cloud adoption, providers are quickly catching up; this trend has partly been accelerated by the pandemic. Service providers have also realized this market need; and to support enterprises on their digital transformation journeys, they are forging industry-specific partnerships. They are also investing in Centers of Excellence (CoEs) and innovation labs to accelerate the development of cloud capabilities.

In the full report, we present an assessment and detailed profiles of 34 IT services providers for their cloud services capabilities featured on the Healthcare Industry Cloud Services PEAK Matrix® Assessment 2024.

The assessment is based on Everest Group's annual RFI process for calendar year 2023, interactions with leading cloud services providers, client reference checks, and an ongoing analysis of the cloud services market.

The report includes the profiles of the following 34 leading service providers featured on the Healthcare Industry Cloud Services PEAK Matrix:

- **Leaders:** Accenture, Cognizant, Deloitte, HCLTech, Infosys, and TCS
- **Major Contenders:** Apexon, Capgemini, CitiusTech, DXC Technology, Emids, Eviden, EXL Services, IBM, Infinite Computer Solutions, LTIMindtree, Mastek, Mphasis, Nordic, NTT DATA, Optum, Persistent Systems, Rackspace Technology, RCG, Tech Mahindra, UST, Virtusa, and Wipro
- **Aspirants:** ABSYZ, Birlasoft, Cloud4C, EPAM, Harman DTS, and SoftServe

Scope of this report

Geography: Global

Industry: Healthcare

Services: Healthcare cloud services

Healthcare Industry Cloud Services PEAK Matrix® characteristics

Leaders

Accenture, Cognizant, Deloitte, HCLTech, Infosys, and TCS

- Leaders have forged strategic partnerships with all the hyperscalers and leading technology providers and are also exploring joint go-to-market motions with them. To augment their capabilities, some of the Leaders have also created cloud-focused business units
- Leaders offer a wide portfolio of healthcare-specific solutions across the entire value chain and have made targeted investments to augment their horizontal and vertical capabilities (e.g., acquisitions and IP)
- Enterprises prefer Leaders to be their strategic partners due to the strong healthcare experience and consulting expertise, understanding of the client's business, the ability to execute large-scale projects, and their robust partner ecosystem

Major Contenders

Apexon, Capgemini, CitiusTech, DXC Technology, Emids, Eviden, EXL Services, IBM, Infinite Computer Solutions, LTIMindtree, Mastek, Mphasis, Nordic, NTT DATA, Optum, Persistent Systems, Rackspace Technology, RCG, Tech Mahindra, UST, Virtusa, and Wipro

- Major Contenders have made cost-effectiveness and strong client responsiveness as major pillars of their engagement with healthcare enterprises, helping them to retain a user base of satisfied customers for their healthcare cloud services
- While their portfolio of offerings might not be as comprehensive as that of Leaders, Major Contenders are investing heavily in partnerships with technology providers and acquisitions of niche providers to augment their capabilities and gain a foothold in the market

Aspirants

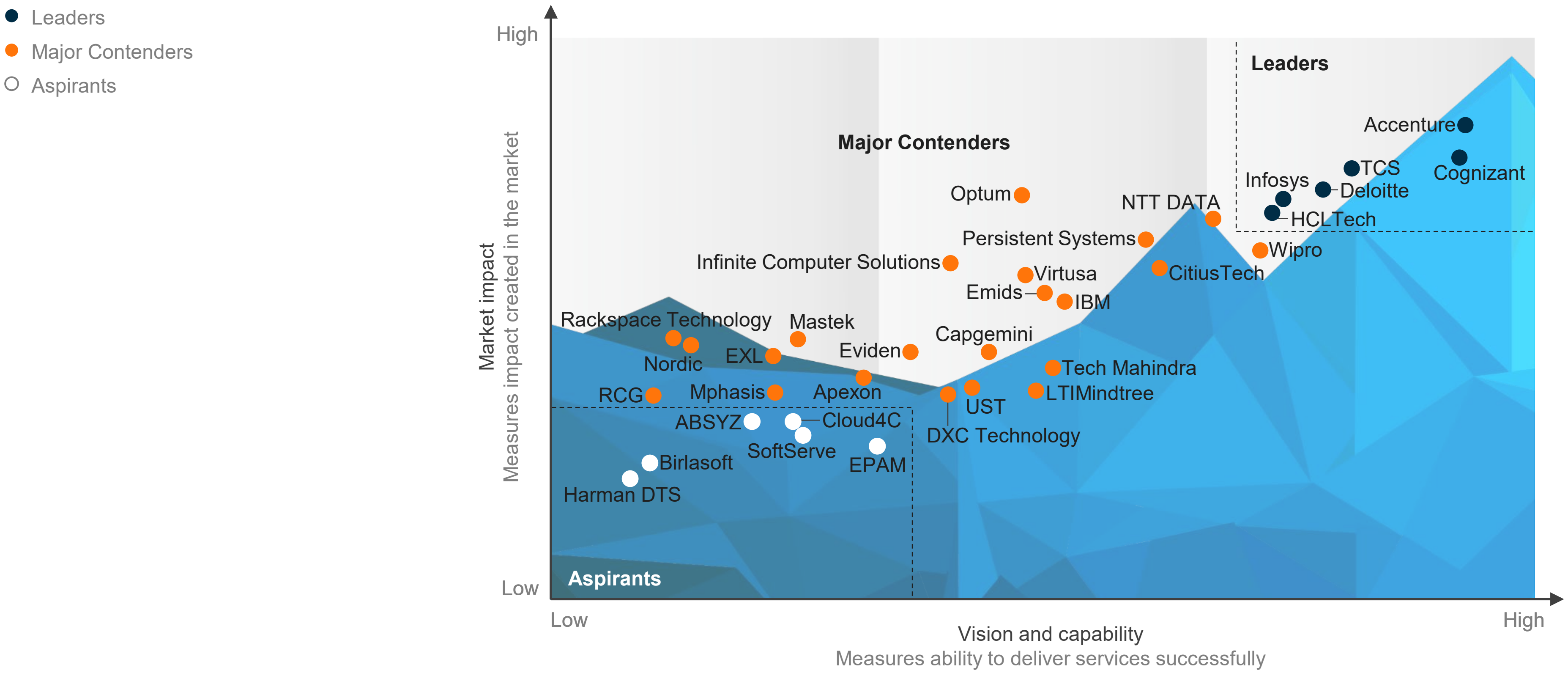
ABSYZ, Birlasoft, Cloud4C, EPAM, Harman DTS, and SoftServe

- Aspirants need to address capability gaps in their offerings by building more IP solutions on cloud
- It is essential for them to build a more robust technology partnership ecosystem and make calculated investments to expand their cloud capabilities and improve market presence and brand recall
- To strengthen their brand recall and mindshare in the healthcare cloud services market, Aspirants should invest in marketing initiatives and thought leadership supported by relevant case studies and proof points

Everest Group PEAK Matrix®

Healthcare Industry Cloud Services PEAK Matrix® Assessment 2024 | Accenture is positioned as a Leader

Everest Group Healthcare Industry Cloud Services PEAK Matrix® Assessment 2024[1]



1 Assessments for Capgemini, Deloitte, EPAM, IBM, LTIMindtree, SoftServe, UST, Virtusa, and Wipro excludes service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with healthcare buyers
Source: Everest Group (2024)

Accenture profile (page 1 of 6)

Overview

Vision for healthcare industry cloud services

Accenture’s proven vision for healthcare is centered on using the power of industry cloud coupled with effective transformation throughout organizations to help clients fulfill their purpose and mission of improving healthcare access, experience, and outcomes. It engaged clients by supporting and advising them on how best to use all that cloud technologies have to offer in an outcome-focused and industry tailored manner including supporting them through unique transformations and enabling high performing future states. With the power of cloud, Accenture helps clients to set and achieve new performance frontiers of service to patients and members while unlocking end-to-end value within their enterprises and across the health ecosystem. Accenture's vision is humanizing healthcare, improving access, experience, and outcomes – leveraging the power of technology and human ingenuity. It is investing in assets, accelerators, and research, and continues to cultivate the best industry and cloud talent. Accenture's vision for cloud services engages partnerships across the healthcare ecosystem.

Revenue attributed to industry cloud services portfolio for healthcare clients (CY 2023)

<US$50 million	US50-100 million	US$100-200 million	**>US$200 million[1]**

Delivery footprint

Region	Key countries/cities
North America	US and Canada
United Kingdom	England and Ireland
Europe	Germany, Czechia, France, Hungary, Italy, Poland, Romania, Spain, and Switzerland
Asia Pacific	Australia, China, India, Indonesia, Japan, New Zealand, Singapore, and Sri Lanka
Rest of the World	Belo Horizonte, Pernambuco, São Paulo, Cape Town, Dubai, Tel Aviv

1 Based on Everest Group estimates

[NOT EXHAUSTIVE]

Revenue mix for industry cloud services portfolio in healthcare (CY 2023)

Low (<10%) | Medium (10-20%) | High (>20%)

By Line of Business (LoB)

Payer	High (>20%)
Providers	High (>20%)
Others	Low (<10%)

Adoption by geography

North America	High (>20%)
Europe	Medium (10-20%)
United Kingdom	Low (<10%)
Asia Pacific	Low (<10%)
Latin America	Low (<10%)
Middle east and Africa	Low (<10%)

By scope of services

Advisory/ Consulting	Low (<10%)
Implementation and integration services	High (>20%)
Custom application development services	Medium (10-20%)
Operation and maintenance services	Low (<10%)

By buyer size

Small (annual revenue <US$2 billion)	Low (<10%)
Large (annual revenue US$2-10 billion)	High (>20%)
Midsize (annual revenue US$10-20 billion)	Medium (10-20%)
Mega (annual revenue >US$20 billion)	Medium (10-20%)

Partnership with hyperscalers

Cloud technology provider	Partnership status/tier (if relevant)
Microsoft	N/A
AWS	N/A
Google Cloud	N/A
Salesforce	N/A
IBM	N/A

Accenture profile (page 2 of 6)

Key Investments

[ILLUSTRATIVE] [NOT EXHAUSTIVE]

Key cloud-specific investments in proprietary solutions/tools/frameworks and talent/Center of Excellence (CoE)

Solutions/tools/frameworks	Details
Accenture Healthcare on Azure (AHA!)	A modular solution built upon Azure for healthcare and life sciences organizations, harnesses the power of data and provides data ingestion, transformation, translation, analytics, and distribution of clinical data to deliver improved patient and operational insights. It enables a range of complex healthcare services including connected care, genomics research, and next best action
Care 24/7 (Telehealth / Virtual Health)	A series of virtual health technologies that provide patient-to-provider, provider-to-provider, member-to-insurer, and administrative capabilities such as virtual visits, remote patient monitoring, specialty consults, rounding, medication reviews and refills, patient education, discharge planning, customer relations, and patient experience. Latest investments include the use of generative AI and Machine Learning (ML) capabilities to support multilingual engagements capabilities across the breadth of patient and member interactions.
Electronic Medical Record (EMR) on the Cloud	Accelerates the migration of EMRs to the public cloud including platforms such as Epic. The suite supports in the migration of EMRs into the cloud to drive infrastructure savings, operational efficiencies, and to transform and digitize patient care through easier integrations with cloud-native tools and applications.
Oracle Health EMR Test Automation	Accelerating the delivery of Oracle Health (Cerner) EMR Test Script Library and Tricentis Tosca Configuration for automated testing with an extensive test script library and application configurations to quickly stand up and perform client automated testing including unit, regression, and integrated testing
Human Health Insights (HHI)	An Accenture Global Health transformational play to industrialize and enhance health clients in their data intelligence journeys. Built by Accenture Data and AI and health industry teams, this also leverages other Accenture investments such as AHA!.
Digital Contact Center Platform (DCCP)	Open and extensible, this collaborative platform for seamless omnichannel customer engagement integrates with high levels of automation for innovative customer and agent experiences. The DCCP solution uses the latest digital technologies to empower customers with flexible connection options. Accenture is enhancing the solution with an assistant powered by generative AI to dramatically increase the efficiency of agents by mining knowledge bases to seamlessly generate answers to customer inquiries.

Accenture profile (page 3 of 6)

Key Investments

[ILLUSTRATIVE] [NOT EXHAUSTIVE]

Key cloud-specific investments in proprietary solutions/tools/frameworks and talent/Center of Excellence (CoE)

Solutions/tools/frameworks	Details
Patient Experience Accelerator (PExA)	An established set of platform-agnostic methodologies, frameworks, and CRM platform components that provides a foundation for the application of enterprise CRM capabilities in a healthcare provider environment. It enables CRMs to become a sophisticated healthcare customer engagement layer in a healthcare provider ecosystem while integrating with EMRs and other systems of record.
Processing.ai	It is a human-machine operating engine that optimizes the synergy of data, applied intelligence, digital technologies, and talent to help organizations transform business operations, create exceptional user experiences, and deliver results previously unimaginable. It leverages computer vision, Natural Language Processing (NLP), and ML to process unstructured and structured documents (such as medical records and applications) across an organization’s core business functions with an understanding of over 100 languages. It has over 120 patents and 40+ patented healthcare solutions.

Accenture profile (page 4 of 6)

Key Investments

[ILLUSTRATIVE] [NOT EXHAUSTIVE]

Other key cloud specific investments in acquisitions, joint ventures (JVs), and partnerships (such as SI, consulting services, SaaS platform/product, and solution partners)

Partnerships/alliances/acquisitions/JVs	Details
Generative AI health studios	Accenture's GenAI Studio has locations worldwide and a specific focus on healthcare. It serves as a dedicated space where data and AI experts from payer, provider, and various health organizations explore industry use cases, conduct generative AI trials, and co-innovate with ecosystem partners, academic institutions, government agencies, and commercial organizations.
People and training	Accenture continuously develops cloud curriculum and conducts hybrid cloud training, DevOps practices, master data management, and technology architecture training. The industry-specific cloud training includes coverage of ecosystem partners' products and joint offerings, as well as its assets and accelerators such as the AHA! precision medicine platform and Google's Healthcare Data Engine product. It also covers various approaches to EMR deployment including cloud delivery of EMR platforms such as the EpicOnAzure curriculum.
Acquisitions and investments	Accenture acquired Solnet, which has services and solutions to help organization accelerate their digital transformation, Nextira – specializing in cloud-native solutions, innovation, predictive analytics, and immersive experiences on AWS, and Navisite – focusing on cloud transformation and having deep experience across multiple cloud providers, enterprise applications, and digital technologies.
Partnership/Ecosystem with hyperscalers	Accenture has a deep and broad ecosystem of technology partners. For example, it partnered with Google Cloud to establish a joint generative AI CoE to provide businesses with industry expertise, technical knowledge, and product resources to build and scale applications using Google Cloud's generative AI portfolio and accelerate time-to-value. With AWS, Accenture jointly funded and co-developed Velocity, a platform that optimizes business outcomes up to 50% faster by removing the complexity associated with building and operating enterprise-scale applications and estates in the cloud. Velocity allows clients to adopt Accenture and AWS innovations more quickly based on the learnings from thousands of Accenture and AWS projects. With Microsoft, Accenture jointly invested in the industrialization of EMR to Azure capabilities – accelerating project deliveries and realizing client value ahead of traditional delivery plans. With Oracle, Accenture's ongoing cross-industry investments continue to provide a series of deployment accelerators and innovative engagement models to accelerate and optimize customer deliveries around the world.

Accenture profile (page 5 of 6)

Case studies

CASE STUDY 1

Accelerating innovation and transforming patient care and medical research with cloud

Business challenge

As part of the client's strategy to reduce technical debt, accelerate innovation, and lower expenses, a large academic medical system with hospitals and a wide network of health services embarked on a program to migrate to the cloud. In keeping with its global reputation for excellence in medical care, the organization is scaling the infrastructure necessary for transforming its patient records, reduce IT costs, and enhance both patient experience and operational efficiency.

Solution

The solution involved migrating more than 400 applications to Microsoft's Azure cloud and scaling the infrastructure required for transforming patient records managed on the Epic platform.

Impact

As an impact, the modernization of patient records, clinical applications, and various other systems across the organization generated savings that could be applied to research and innovation. The cloud initiative has yielded dividends, with several data centers experiencing reductions in annual spending. The migration to the cloud is helping it shift away from legacy systems and improve responses to unexpected changes in data traffic, ensuring the availability and reliability of its mission-critical systems

CASE STUDY 2

Unified national health systems: increased efficiency, improved quality of patient care

Business challenge

Norwegian citizens' information stored in several different administrative silos made it difficult and time consuming for healthcare professionals to gain access to a patient's vital data and provide timely and appropriate treatment. The country decided to digitize and integrate its healthcare sector to create national health records. The task was aimed at enabling health services to interact and collaborate more effectively, empowering patients to manage their health, and improving patient safety.

Solution

The solution was a digital and unified record management system focused on critical system performance and data privacy. It enabled seamless information sharing in the national healthcare sector including after-hours emergency primary care, emergency services, and general practitioners' offices. Accenture leveraged its global experience from similar projects in the Asia Pacific region and local knowledge and experience from similar implementations in other industry sectors.

Impact

As an impact, the new digital system of seamless information enabled sharing across the national healthcare sector. Patients had visibility into their health information records through a web portal, empowering them to take an active role in their care. This new system laid the foundation for future developments such as **One citizen, One record**, and for connected health and collaboration among all healthcare services, improving the health and welfare of all Norwegians.

CASE STUDY 3

Enabled a seamless and integrated customer experience across businesses

Business challenge

A large healthcare services and products company faced the challenge of transforming how it served and supported its customers by providing a seamless and integrated care experience across its different business units. To achieve this, it needed to have innovative solutions and required a robust digital core. It undertook a cloud journey, migrating over 2,500 Windows and Linux servers along with various applications including a combination of commercial off-the-shelf software and in-house developed applications.

Solution

The client leveraged the Microsoft Azure Cloud by creating an Azure Kubernetes service to house newly migrated applications. It also migrated key enterprise systems such as databases and API gateways out of its legacy cloud provider and refactored as necessary to utilize the new Azure Cloud-native capabilities.

Impact

As an impact, it realized its approach to total health by making quality care more affordable, accessible, and seamless for all its customers. It helped lay the digital core foundation for its next evolution of digital transformation. The approach to migrate and operate enabled it to achieve benefits such as improved team adaptation to the new ways of working in the cloud, faster integration with existing DevOps frameworks extended into DevSecOps, reduced timelines for meeting security compliance, adoption of modern system models and development patterns for application development, and right-sizing of cloud infrastructure for current and future demand.

Accenture profile (page 6 of 6)

Everest Group assessment – Leader

Measure of capability: Low High

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

Strengths

- Accenture has a wide array of healthcare offerings across the payer and provider value chain, with a strong focus on care management and claims management. For instance, it offers the Accenture Health Insights Platform, a robust data analytics platform that helps healthcare enterprises harness the power of data to generate insights and accelerate decision-making
- Accenture has forged strategic partnerships with hyperscalers, BigTechs, and other technology providers. It also has dedicated business units with hyperscalers, where they co-innovate and adopt a joint GTM strategy to enhance market access
- Accenture has also made significant digital investments around cloud. For instance, it launched Accenture Cloud First, a major initiative designed to create a new model for rapid cloud migration and value realization for clients and their stakeholders. It has also made strong acquisitions, such as Naviste, Solnet, and Nextira Insight, to deepen its cloud consulting capabilities

Limitations

- While Accenture has partnered with BigTechs to scale its generative AI capabilities in areas such as prior authorization and claims management, it should expand the application of generative AI to other value chain elements such as care management and claims processing
- Even though Accenture provides innovative pricing models such as outcome-based and risk-sharing arrangements, it is often seen as a high-cost service provider. It should look to renew its market perception around price competitiveness
- While Accenture has presence across various client sizes such as large, midsize, and small, most of its client success stories revolve around engaging with large clients. It can seek to create more proof points of engagement with small and midsize accounts

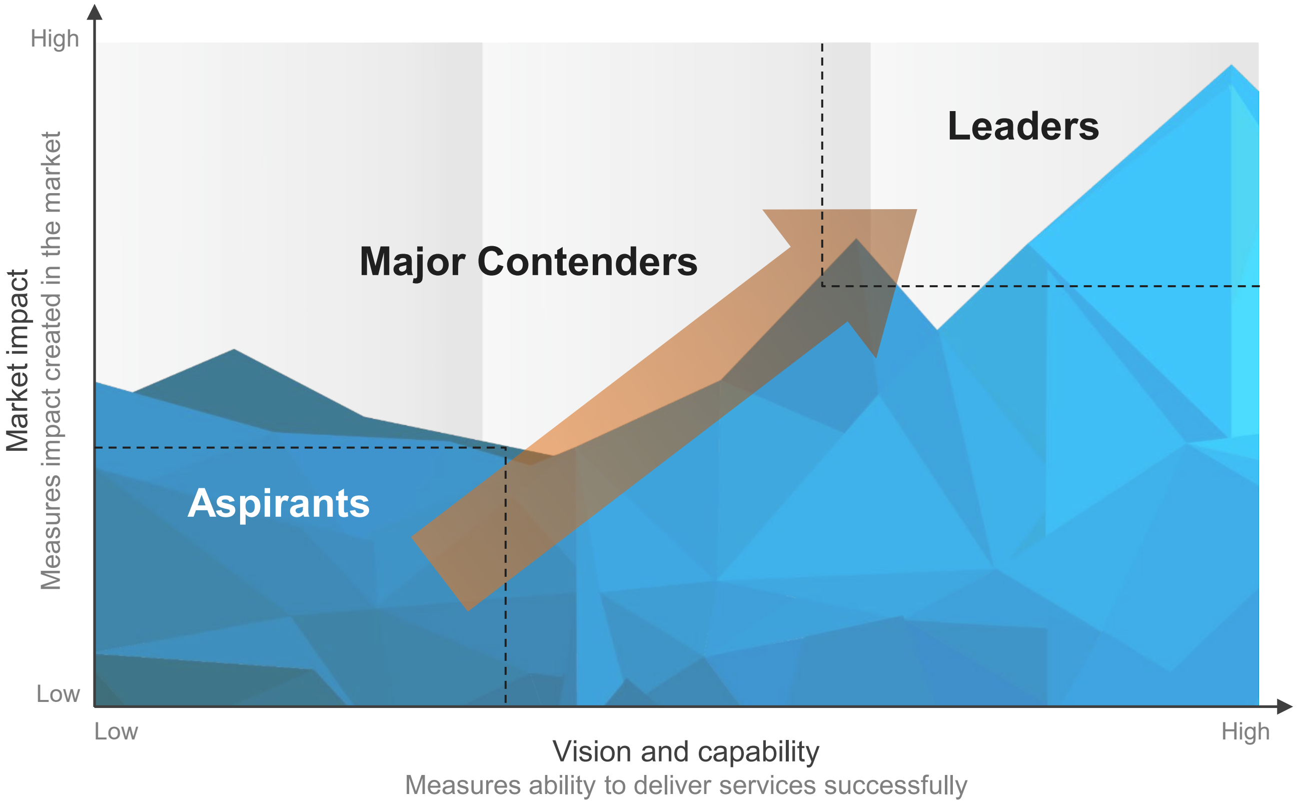
Appendix

PEAK Matrix® framework

FAQs

Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision and capability

Everest Group PEAK Matrix



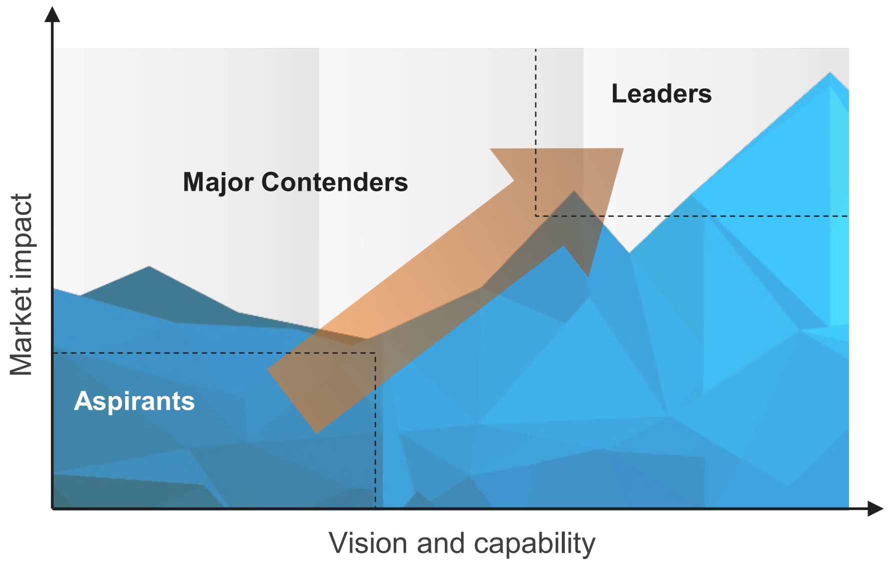
Services PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

Market adoption
Number of clients, revenue base, YoY growth, and deal value/volume

Portfolio mix
Diversity of client/revenue base across geographies and type of engagements

Value delivered
Value delivered to the client based on customer feedback and transformational impact



Measures ability to deliver services successfully. This is captured through four subdimensions

Vision and strategy
Vision for the client and itself; future roadmap and strategy

Scope of services offered
Depth and breadth of services portfolio across service subsegments/processes

Innovation and investments
Innovation and investment in the enabling areas, e.g., technology IP, industry/domain knowledge, innovative commercial constructs, alliances, M&A, etc.

Delivery footprint
Delivery footprint and global sourcing mix

FAQs

Q: Does the PEAK Matrix® assessment incorporate any subjective criteria?

A: Everest Group's PEAK Matrix assessment takes an unbiased and fact-based approach that leverages provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information. In addition, we validate/fine-tune these results based on our market experience, buyer interaction, and provider/vendor briefings.

Q: Is being a Major Contender or Aspirant on the PEAK Matrix, an unfavorable outcome?

A: No. The PEAK Matrix highlights and positions only the best-in-class providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition.

Q: What other aspects of the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?

A: A PEAK Matrix positioning is only one aspect of Everest Group's overall assessment. In addition to assigning a Leader, Major Contender, or Aspirant label, Everest Group highlights the distinctive capabilities and unique attributes of all the providers assessed on the PEAK Matrix. The detailed metric-level assessment and associated commentary are helpful for buyers in selecting providers/vendors for their specific requirements. They also help providers/vendors demonstrate their strengths in specific areas.

Q: What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?

A: Enterprise participants receive summary of key findings from the PEAK Matrix assessment

For providers

- The RFI process is a vital way to help us keep current on capabilities; it forms the basis for our database – without participation, it is difficult to effectively match capabilities to buyer inquiries
- In addition, it helps the provider/vendor organization gain brand visibility through being in included in our research reports

Q: What is the process for a provider / technology vendor to leverage its PEAK Matrix positioning?

A: Providers/vendors can use their PEAK Matrix positioning or Star Performer rating in multiple ways including:

- Issue a press release declaring positioning; see our citation policies
- Purchase a customized PEAK Matrix profile for circulation with clients, prospects, etc. The package includes the profile as well as quotes from Everest Group analysts, which can be used in PR
- Use PEAK Matrix badges for branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)

The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with Everest Group; please contact your CD or contact us

Q: Does the PEAK Matrix evaluation criteria change over a period of time?

A: PEAK Matrix assessments are designed to serve enterprises' current and future needs. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality and to serve enterprises' future expectations.

Stay connected

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
+1-214-451-3000

Website
everestgrp.com

Blog
everestgrp.com/blog

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