



Everest Group Healthcare Provider Digital Services PEAK Matrix® Assessment 2024

Focus on Accenture

December 2024



Introduction

Healthcare providers have historically been bogged 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 market disrupted by workforce shortage, evolving regulations, and security threat landscape.

Service providers are ramping up capabilities through healthcare-specific partnerships and acquisitions to support enterprises on their digital journeys. This, in turn, drives 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 present an assessment of 35 healthcare ITS providers. These service providers are mapped on the Everest Group [Healthcare Provider Digital Services PEAK Matrix® Assessment 2024](#), which is a composite index of a range of distinct metrics related to a

provider's capability and market impact. We focus on the provider digital services market size and growth, digital services themes for healthcare providers, assessment of service providers on several capabilities and market success-related dimensions, and Everest Group's independent remarks on service providers.

This report includes the profiles of the following 35 leading service providers featured on the Healthcare Provider Digital Services PEAK Matrix:

- **Leaders:** Accenture, Cognizant, Deloitte, HCLTech, NTT DATA, Optum, TCS
- **Major Contenders:** Apexon, Capgemini, CitiusTech, DXC Technology, Emids, EPAM, Eviden, EXL, GAVS Technologies, Hitachi Digital Services, HTC Global Services, IBM, Infinite Computer Solutions, Innova Solutions, LTIMindtree, Mastek, Persistent Systems, R Systems, SoftServe, Tech Mahindra, Virtusa, Wipro
- **Aspirants:** Hexaware, Indium, Jade Global, Marlabs, Mirketa, Mphasis

Scope of this report

Geography: Global

Industry: healthcare provider

Services: digital services

Healthcare provider digital services PEAK Matrix® characteristics

Leaders

Accenture, Cognizant, Deloitte, HCLTech, NTT DATA, Optum, and TCS

- Leaders have established themselves as front-runners to support large provider accounts in their digital transformation journeys across various areas of the provider value chain such as patient engagement, care management, diagnostics, monitoring, and treatment, and financials and network management
- They differentiate themselves through balanced portfolios, strong thought leadership, innovative digital solutions, and continued investments in technology and service capability development (internal IP/tools, CoEs, etc.)
- Leaders are also able to forge strategic partnerships with hyperscalers to co-innovate and develop joint Go-to-market (GTM) offerings to enhance market presence

Major Contenders

Apexon, Capgemini, CitiusTech, DXC Technology, Emids, EPAM, Eviden, EXL, GAVS Technologies, Hitachi Digital Services, HTC Global Services, IBM, Infinite Computer Solutions, Innova Solutions, LTIMindtree, Mastek, Persistent Systems, R Systems, SoftServe, Tech Mahindra, Virtusa, and Wipro

- The service offerings of Major Contenders are not as well-rounded as those of Leaders and often lack comprehensive coverage of the provider value chain. Nevertheless, Major Contenders are actively working to narrow the gap with Leaders by investing in initiatives such as forming partnerships with niche vendors and establishing innovation labs to expand their services and enhance their value proposition
- Major Contenders have made cost-effectiveness and strong client responsiveness the major pillars of their engagements with healthcare enterprises, helping them to retain a loyal base of satisfied customers for their healthcare provider digital services

Aspirants

Hexaware, Indium, Jade Global, Marlabs, Mirketa, and Mphasis

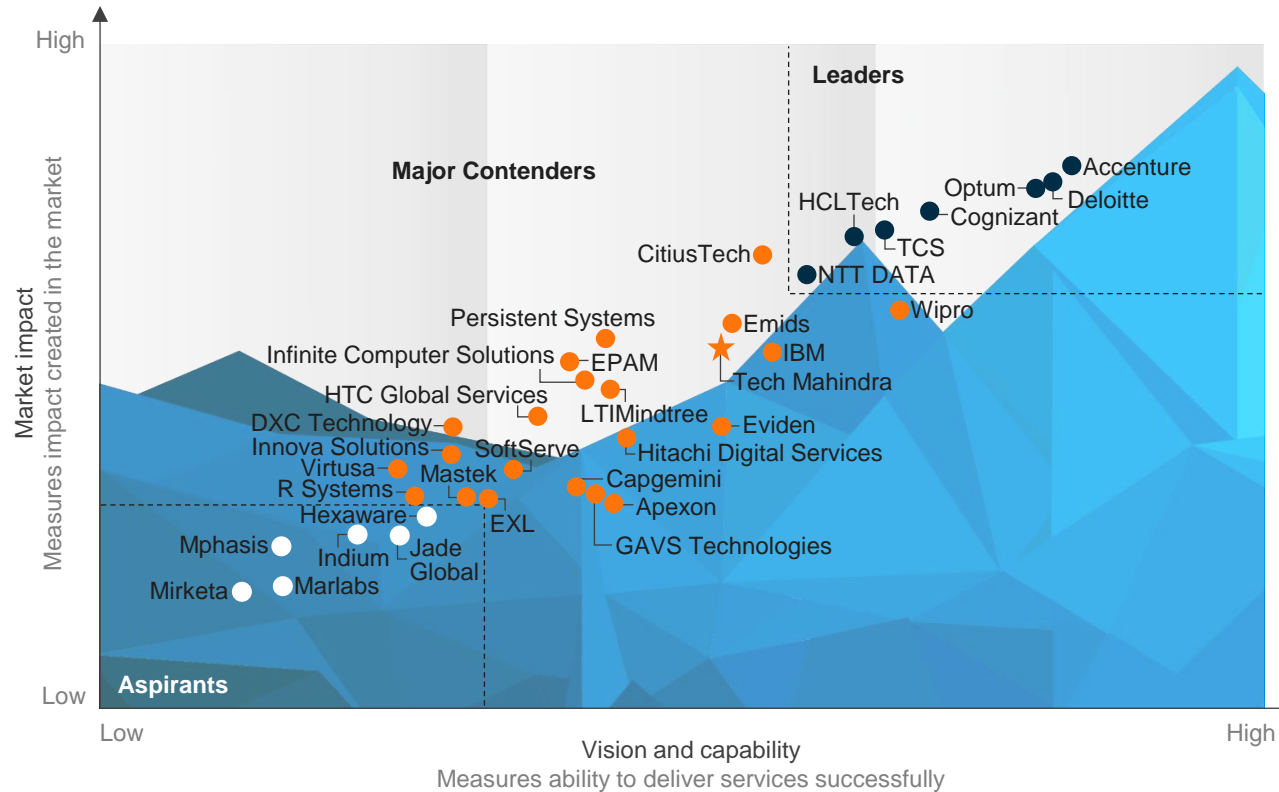
- The majority of the Aspirants offer vertical-agnostic offerings applicable to healthcare providers; however, building healthcare-specific solutions and investing in healthcare-specific partnerships and acquisitions can enhance their solutions by addressing multiple areas within the provider value chain
- It is essential for Aspirants to build a more robust technology partnership ecosystem and make investments to expand their digital capabilities and develop healthcare-focused offerings
- To strengthen their brand recall and mindshare in the payer market, Aspirants should invest in marketing initiatives supported by relevant case studies and proof points

Everest Group PEAK Matrix®

Healthcare Provider Digital Services PEAK Matrix® Assessment 2024 | Accenture is positioned as a Leader

Everest Group Healthcare Provider Digital Services PEAK Matrix® Assessment 2024¹

- Leaders
- Major Contenders
- Aspirants
- ☆ Star Performers



¹ Assessments for Deloitte, EPAM, Hexaware, IBM, Marlabs, Mphasis, Optum, and Wipro exclude 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 5)

Overview

Company mission/vision statement for healthcare provider digital services

Accenture's vision for digital services in healthcare focuses on helping healthcare providers transform and achieve their goals. It aims to make healthcare better by improving access, experiences, and outcomes using technology and creativity. The focus is on supporting and challenging healthcare clients to use technology effectively. By helping providers build important technology systems, known as the digital core, it wants to create new ways to add value within healthcare organizations and the entire healthcare system. It involves investing in skilled people, research, tools, and partnerships that are all designed to improve access, experiences, and outcomes in healthcare.

Key partnerships

- Microsoft
- Google
- AWS
- SAP
- Oracle
- Salesforce
- ServiceNow
- NVIDIA
- Adobe
- Workday
- Epic
- UKG
- ixlayer
- RealizedCare

[NOT EXHAUSTIVE]

Healthcare provider digital services revenue mix (CY 2023)

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

By Line of Business (LoB)

- Large health systems
- Stand-alone hospitals/clinics
- Pharmacies
- Diagnostic labs
- Physician practices

Adoption by geography

- North America
- Europe
- United Kingdom
- Asia Pacific
- South America
- Middle East and Africa

By value chain element

- Patient engagement
- Diagnostics, treatment, and monitoring
- Care/Case management
- Financials and network management
- Others

By buyer size

- Small (annual client revenue <US\$1 billion)
- Medium (annual client revenue US\$1-10 billion)
- Large (annual client revenue >US\$10 billion)

Accenture profile (page 2 of 5)

Offerings

[REPRESENTATIVE LIST]

Key healthcare specific investments in proprietary solutions/tools/frameworks

Solution/tools/framework name	Value chain	Details
Human health insights	Multiple	It provides engine-generated personalized care insights to enable clients to improve health access, experience, and outcomes for individuals and target populations through pre-built models calibrated to the client's populations.
Patient Experience Accelerator (PExA) methodology	Patient engagement	It is a set of methodologies and workflows that provide a foundation for the application of enterprise Customer Relationship Management (CRM) capabilities in a provider environment.
Care 24/7 (telehealth/virtual health)	Multiple	It enables consumer-to-provider, provider-to-provider, and administrative capabilities including virtual visits, remote patient monitoring, specialty consults, rounding, discharge planning, customer relations, patient experience, and more.
Accenture Healthcare on Azure (AHA!)	Multiple	It is a modular solution based on Azure for healthcare businesses that harnesses the power of data, delivering data ingestion, transformation, translation, analytics, and distribution of clinical data to deliver better insights.
Processing.ai	Multiple	It is an innovative human-machine operating engine that optimizes the synergy of data, applied intelligence, digital technologies, and talent to help organizations transform business operations, create better user experiences, and deliver results. It leverages computer vision, natural language processing, and machine learning to process unstructured and structured documents (for example, medical records and applications) across the client's core business functions, with an understanding of over 100+ languages.
Digital Contact Center Platform (DCCP)	Patient engagement	It is an open, extensible, and collaborative platform for seamless, omnichannel customer engagement with high levels of automation for innovative customer and agent experiences.
EMR on the cloud – health management (care management)	Care management	It accelerates the migration of Electronic Medical Records (EMRs) to the public cloud (for example, Epic on Azure).
Accenture SynOps for health	Multiple	It is an operating platform that draws on and orchestrates work across human and machine talent, harnessing data and insights to deliver real-time intelligence that unlocks new sources of value and outcomes across the enterprise.
Medical device security and patient privacy	Multiple	It is a client security solution with Internet of Medical Things (IoMT)/medical device security capabilities, which aids healthcare providers in asset management, network security, and clinical Standard of Care (SOC) implementation. It focuses on including robust measures for Protected Health Information (PHI) data protection, privacy, encryption, tokenization, and compliance.

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Recent developments

[REPRESENTATIVE LIST]

Key healthcare specific investments in acquisitions, Joint Ventures (JVs), talent/Center of Excellence (CoE), and partnerships (such as SaaS platform/product and solution partners)

Event name	Type of event	Details
Generative AI health studios	Investments	It established health generative AI studios globally as dedicated spaces where data and AI experts from payers, providers, and other health organizations explored industry use cases, conducted generative AI pilots, and co-innovated with ecosystem partners and leading academic organizations.
Cyber fusion centers and cyber labs	Innovation centers/labs	It established cyber fusion centers and cyber labs as part of its secure data and infrastructure solutions. These centers were designed to improve security measures and offer clients practical experiences with its security capabilities. This initiative aimed to enhance overall cybersecurity effectiveness and client engagement through hands-on opportunities.
People and training	Investments	It invested significantly in key hires, practitioner masterclasses, and certifications across AI, cloud, security, blockchain, HL7, FHIR, EPIC/EMR Cloud, Extended Reality (ER), edge computing, 5G, and quantum technologies.
Partnership/Ecosystem with hyperscalers	Partnership	It strengthened partnerships including creating the Accenture and Google Cloud joint generative AI CoE and forming the Accenture and NVIDIA business group to accelerate generative AI innovation and develop agentic AI systems using tools such as the AI refinery.
AI and generative AI	Investment	It invested US\$3 billion in cross-industry generative AI initiatives including developing industry solutions and pre-built models, while enhancing employee expertise with AI tools such as the reinvention console to help clients address challenges, build resilience, and drive transformation
Cognosante	Acquisition	It acquired Cognosante, a provider of digital transformation and cloud modernization solutions for federal health, defense, intelligence, and civilian agencies.
The Beacon Group	Acquisition	It acquired The Beacon Group, a growth strategy consultancy firm serving Fortune 500 companies across technology, aerospace, industrial, healthcare, and life sciences industries.
Intellera Consulting	Acquisition	It acquired Intellera Consulting, an Italian consultancy firm operating in the public administration and healthcare sectors. The acquisition aligns with its ongoing focus on helping Italian public service organizations enhance and transform citizen services.

Accenture profile (page 4 of 5)

Recent developments

[REPRESENTATIVE LIST]

Key healthcare specific investments in acquisitions, JVs, talent/CoE, and partnerships (such as SaaS platform/product and solution partners)

Event name	Type of event	Details
Udacity	Acquisition	It acquired Udacity, a digital education leader specializing in proprietary technology courses, combining the flexibility of online learning with human instruction. The acquisition aimed to enhance capabilities in delivering innovative education solutions.
GemSeek	Acquisition	It acquired GemSeek, a leading customer experience analytics provider, to enhance capabilities in insights, analytics, and AI-powered predictive models for global businesses. GemSeek offers expertise in advanced analytics, customer experience program management, and proprietary technologies and supports industries such as telecommunications, healthcare, consumer goods, and financial services.
Navisite	Acquisition	It acquired Navisite, a digital transformation and managed services provider, to enhance application and infrastructure managed services capabilities across North America. Navisite, with over 400 cloud engineers and 2,000 certifications, brought expertise in multi-cloud providers, enterprise applications, and digital technologies, serving industries such as healthcare, life sciences, and manufacturing.
Ammagamma	Acquisition	It acquired Ammagamma, an Italy-based firm specializing in AI and generative AI technologies. Ammagamma brought 90 professionals skilled in AI, engineering, and design and worked across energy, insurance, and automotive sectors. Joining the advanced center for AI in Europe, the acquisition aimed to foster innovation and strengthen Italian economic and technological capabilities.
Redkite	Investment	It acquired Redkite, a UK-based data consultancy specializing in full-stack data expertise, to enhance data capabilities and support clients in leveraging AI through modern data platforms. It brought over 230 professionals with expertise in consumer goods, retail, and media.
ConcentricLife	Acquisition	It acquired ConcentricLife, a leading healthcare marketing agency specializing in building optimal brand experiences for life sciences brands across the health journey. The acquisition reinforced Accenture Song's focus on providing end-to-end solutions for life sciences clients.
Nautilus Consulting	Acquisition	It acquired Nautilus Consulting, a UK-based digital healthcare consultancy specializing in Electronic Patient Record (EPR) solutions, to strengthen digital transformation and optimization capabilities in healthcare. It brought a team with expertise in bridging clinical users and IT suppliers, improving patient outcomes and driving operational efficiencies. The acquisition aimed to enhance healthcare solutions and support clients in optimizing their digital health strategies.










Accenture profile (page 5 of 5)

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 offers a wide range of healthcare solutions across the provider value chain, with a strong focus on care management and patient engagement. For instance, it provides the Accenture Health Experience Platform, which helps healthcare providers enhance the patient experience
- Accenture has also made significant digital investments in healthcare, especially in cloud, AI/ML, and data analytics. For instance, it launched Accenture Cloud First, an initiative to create a new model for rapid cloud migration. It has also made strong acquisitions, such as Bridgei2i and Core Compete, to deepen its healthcare data and analytics capabilities
- Accenture has made healthcare cybersecurity services a key focus, aiming to reduce risks and minimize the impact of cyber attacks on healthcare providers

Limitations

- While Accenture has made significant investments to enhance its generative AI capabilities in the area of prior authorization, it can look to provide more proof points of successfully implementing generative AI in healthcare provider engagements
- Despite offering innovative pricing models (such as outcome-based and risk-sharing models), Accenture is perceived as a premium-priced player; it should look to renew its market perception around price competitiveness
- Accenture has a robust presence in the large buyer segment; however, there is an opportunity to further increase its client base by focusing on the SMB segment

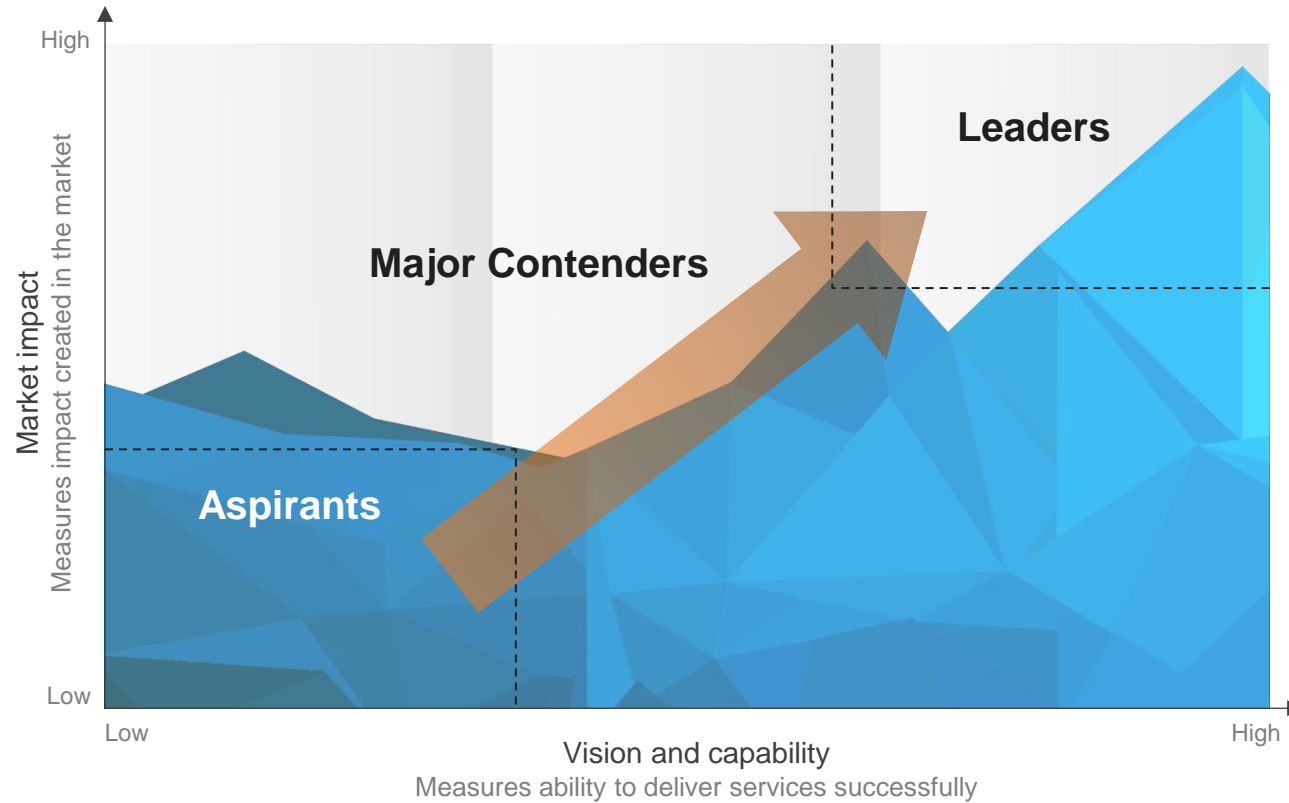
Appendix

PEAK Matrix® framework

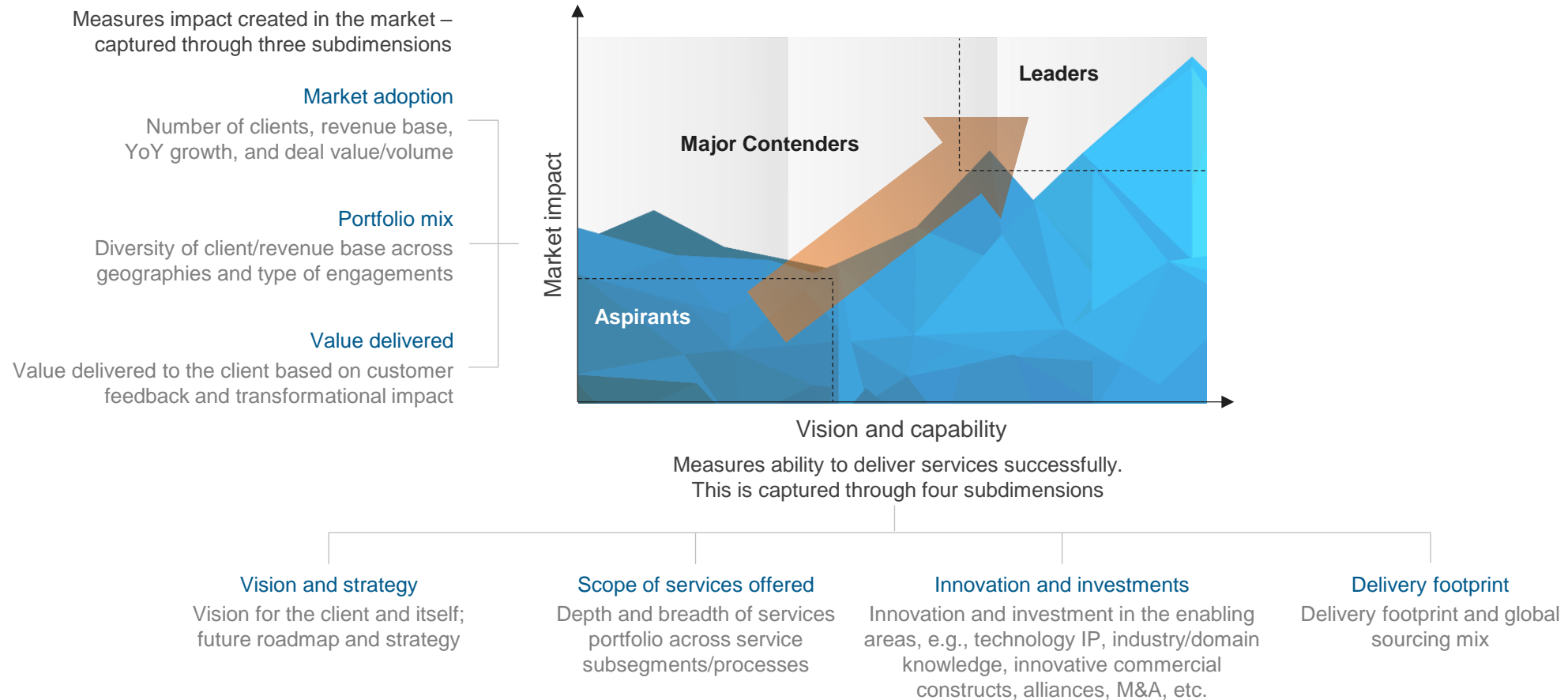
FAQs

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



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 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.

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