



Everest Group Healthcare Payer Digital Services PEAK Matrix® Assessment 2023

Focus on Accenture
January 2024



Introduction

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

To support enterprises on their digital transformation journeys, providers are forging industry-specific partnerships and acquiring relevant companies. They are also investing in Centers of Excellence (CoEs) and innovation labs to accelerate development of capabilities. This has driven 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 32 healthcare ITS providers. These service providers are mapped on the [Healthcare Payer Digital Services PEAK Matrix® Assessment 2023](#), 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.

The full report features the following 32 leading service providers on the Healthcare Payer Digital Services PEAK Matrix:

- **Leaders:** Accenture, Cognizant, Deloitte, HCLTech, Infosys, NTT DATA, Optum, TCS, and Wipro
- **Major Contenders:** Brillio, Capgemini, Concentrix, Conduent, DXC Technology, Emids, EPAM, IBM, Infinite Computer Solutions, Innova Solutions, LTIMindtree, Mphasis, Smart Data Solutions, UST, and Virtusa
- **Aspirants:** Ascendum, HTC Global Services, Quantiphi, SoftServe INC, and Vee Technologies
- **Star Performers:** CitiusTech, Persistent Systems, and Tech Mahindra

Scope of this report



Geography
Global (focus on the US)



Providers
Providers of healthcare digital services to payers



Services
Digital services

Healthcare Payer Digital Services PEAK Matrix® characteristics

Leaders

Accenture, CitiusTech, Cognizant, Deloitte, HCLTech, Infosys, NTT DATA, Optum, TCS, and Wipro

- Leaders have established themselves as front-runners to support large payer accounts in their digital transformation journeys across various areas of the payer value chain such as claims management, network management, and policy servicing
- 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
- Enterprises prefer Leaders to be their strategic partners due to their strong healthcare experience and consulting expertise, understanding of the client's business, the ability to execute large-scale projects, and a robust partner ecosystem

Major Contenders

Brillio, Capgemini, Concentrix, Conduent, DXC Technology, Emids, EPAM, IBM, Infinite Computer Solutions, Innova Solutions, LTIMindtree, Mphasis, Persistent Systems, Smart Data Solutions, Tech Mahindra, UST, and Virtusa

- The service offerings of Major Contenders are not as well-rounded as those of Leaders and often lack comprehensive coverage of the payer 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 as the major pillars of their engagements with healthcare enterprises, helping them to retain a loyal base of satisfied customers for their healthcare data and analytics services
- Major Contenders' focus on being more client-centric, agile, and flexible is well acknowledged by enterprises. Clients get adequate face time with senior leadership and appreciate the responsiveness of the senior management

Aspirants

Ascendum, HTC Global Services, Quantiphi, SoftServe INC, and Vee Technologies

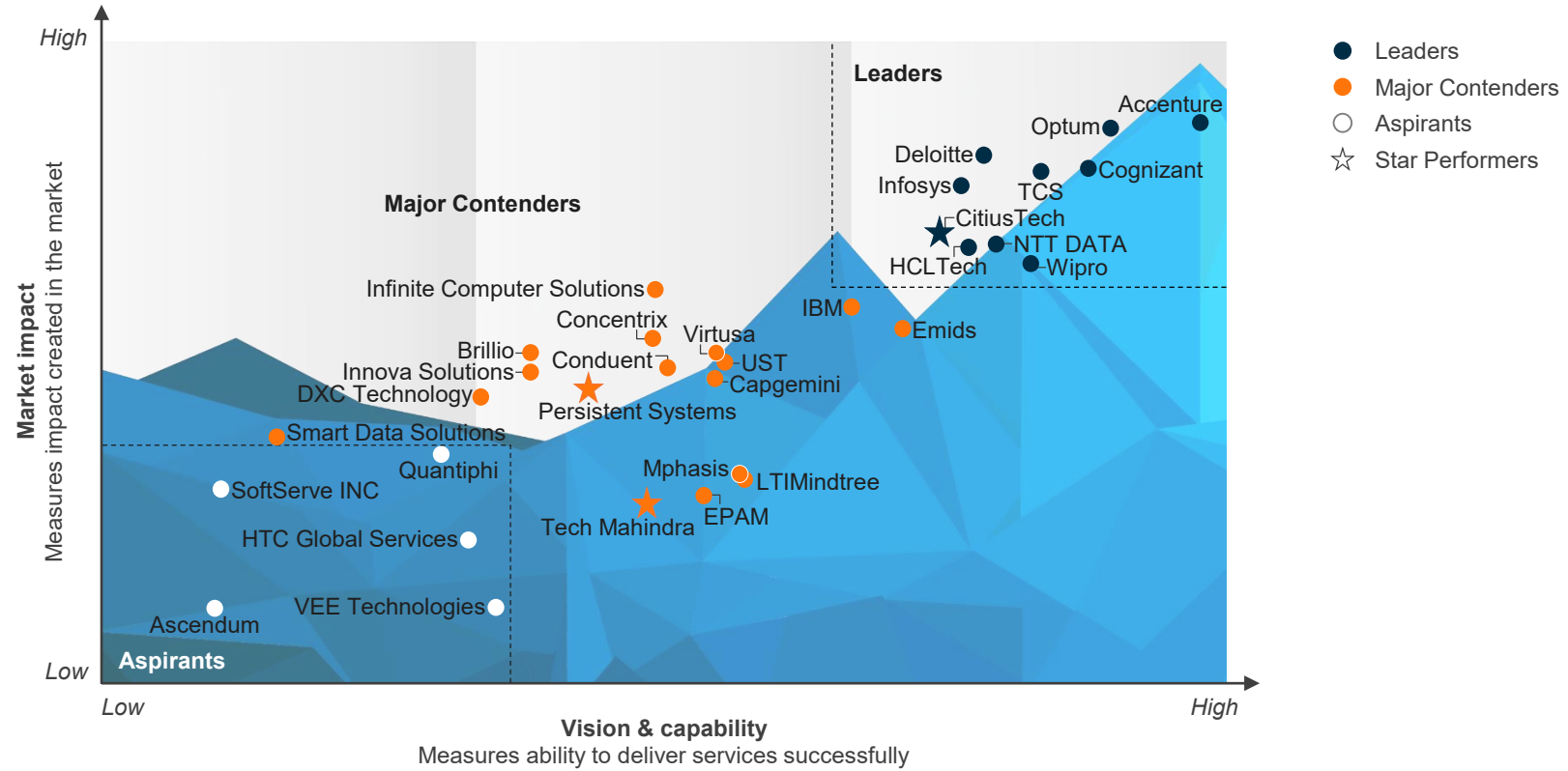
- It is essential for Aspirants to build a more robust technology partnership ecosystem and make investments to expand their digital capabilities and develop healthcare-focused offerings
- To strengthen their brand recall and mindshare in the payer market, Aspirants should invest in marketing initiatives supported by relevant case studies and proof points

Everest Group PEAK Matrix®

Healthcare Payer Digital Services PEAK Matrix® Assessment 2023 |

Accenture is positioned as a Leader

Everest Group Healthcare Payer Digital Services PEAK Matrix® Assessment 2023^{1,2}



1 Assessments for Ascendum, Conduent, IBM, Optum, and VEE Technologies, 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

2 Analysis for Concentrix is based on its capabilities before its merger with Webhelp

Source: Everest Group (2023)

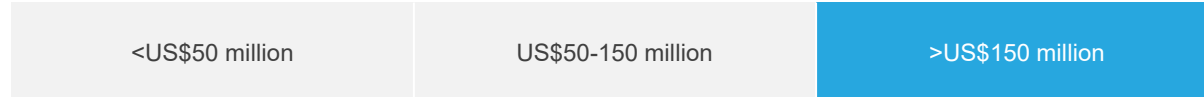
Accenture profile (page 1 of 4)

Overview

Company mission/vision statement

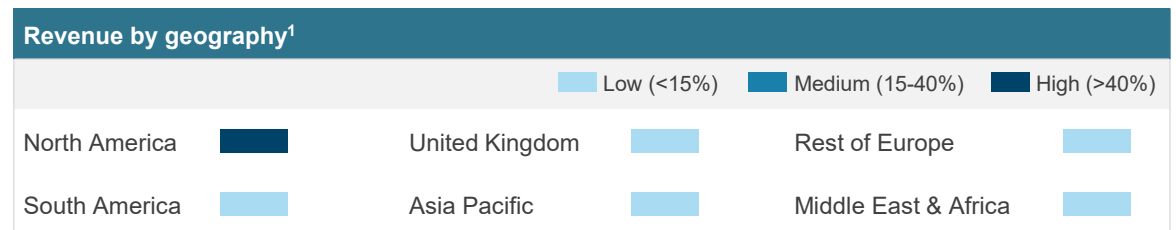
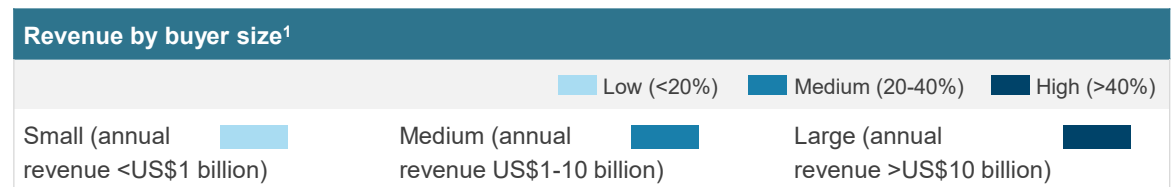
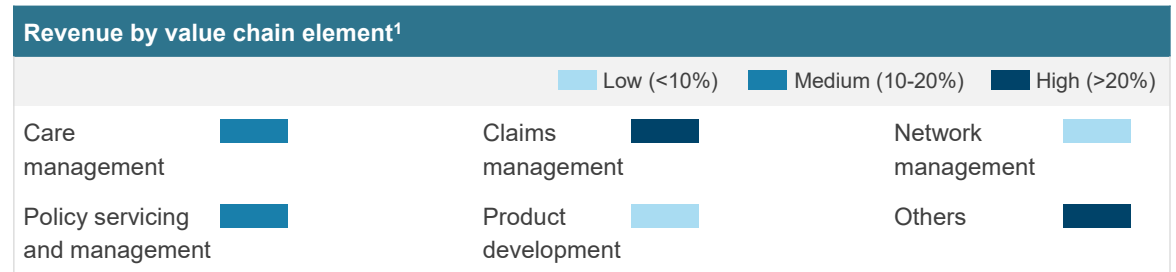
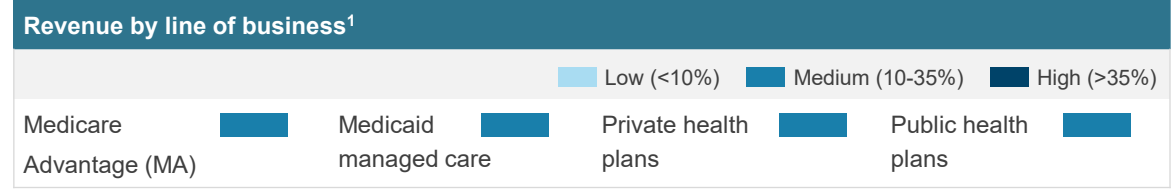
Accenture's vision is one of Humanizing Healthcare – improving health access, experience, and outcomes by harnessing the power of technology and human ingenuity. It wants to enable clients to provide convenient and affordable care by improving health access and experiences, resulting in better clinical and business outcomes.

Healthcare payer digital services revenue



Key partnerships

- AWS
- Adobe
- Epic
- Google
- Microsoft
- Oracle
- Salesforce
- Workday
- ServiceNow



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

Accenture profile (page 2 of 4)

Key offerings

Proprietary solutions (representative list)	
Solution name	Details
Accenture Healthcare on Azure	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; Healthcare on Azure also enables connected care services
Human Health Insights (HHI)	A data analytics offering that curates and channels data through Machine Learning (ML) models to generate personalized, population-level, and operational insights, driving value for care providers and business operators. Current use cases include care management and navigation, claims operations and quality, clinical value targeting, sales and product, and financial spend and operations. The design of HHI is underpinned by Responsible Artificial Intelligence (RAI), including more than 60 RAI checkpoints in the model development lifecycle
Accenture Health Insights Platform – public health	A data analytics platform that helps state Medicaid, public health, and other agencies harness the power of data to generate insights and accelerate decision-making; the platform empowers states to share data across agencies and gain a 360-degree view of people and programs
Solutions.AI for Processing for Health	A collection of patented healthcare AI solutions that augment human processors across health business processes; Solutions.AI for Processing for Health has over 20 health automation use cases. The solution pre-reads unstructured (e.g., medical records), semi-structured, and structured (e.g., claims) documents, and provides recommendations. Its application uses computer vision, Natural Language Processing (NLP), ML, and administrative/clinical knowledge libraries, to classify content and identify key terms and phrases, to deduce answers, and to present the recommended answer. With the help of a skilled user, the application continually learns and improves over time
Accenture SynOps for Health	A human-machine operating engine that optimizes the synergy of data, applied intelligence, digital technologies, and talent to help organizations transform business operations, improve user experiences, and deliver results
Care 24/7 (Telehealth / Virtual health)	A virtual health solution that enables consumer-to-provider, provider-to-provider, and administrative capabilities, including virtual visits, remote patient monitoring, specialty consults, rounding, discharge planning, customer relations, and patient experience
myNav	Supports transformation from insights to action using a pragmatic approach that simplifies complexity. It simulates how potential solutions will function at scale, validating that it is the right fit the first time. It then executes the migration and enables seamless operation of a company’s cloud ambition to achieve and maintain the expected business value
myWizard®	Helps enterprises establish and manage structured approaches for enterprise automation, modern engineering, modern operations, and automation for cloud transformation.
HumanX	A key component of Accenture’s Industry X, the Smart Connected Product Design and Development practice has empowered Accenture to create Proof of Concepts (PoCs), Minimum Viable Products (MVPs), and scaled opportunities for clients by leveraging IoT
Medical device security & patient privacy	A client security with IoMT/Medical Device Security solutions, which aids healthcare providers in asset management, network security, and clinical SOC implementation; it focuses on including robust measures for PHI data protection, privacy, encryption, tokenization, and compliance

Accenture profile (page 3 of 4)










Recent developments

Key events (representative list)			
Development	Type	Year	Details
ConcentricLife	Acquisition	2023	Acquired ConcentricLife, a leading healthcare marketing agency with expertise in helping healthcare and life sciences brands build an optimal brand experience at any stage of the health journey
The Shelby Group	Acquisition	2023	Acquired The Shelby Group, a leading provider of digital procurement and optimization services; the acquisition further enhances Accenture's capabilities in sourcing and procurement technology transformation
Innotec Security	Acquisition	2023	Acquired Innotec Security, a privately held company specializing in cybersecurity-as-a-service, cyber resilience, and cyber risk management, expanding its capabilities and footprint in Spain
OnProcess Technology	Acquisition	2023	Acquired OnProcess Technology, a provider of supply chain managed services, to help organizations refine processes, improve the way inventory is managed, and solve complex service challenges
Strategic alliance/partnership ecosystem	Investment	Ongoing	Continuing to invest in dedicated teams called Accenture Business Groups, focused on joint strategies, assets, and go-to-market activities with Microsoft, Oracle, Salesforce, AWS, Google, ServiceNow, and other ecosystem partners, building tools and solutions to lead in digital transformation
Digital talent upskilling	Investment	Ongoing	Continuing to invest significantly in key hires, training, and career development in Technology Quotient and practitioner Masterclasses as well as certifications in AI, cloud, security, blockchain, HL7, FHIR, EPIC/EMR Cloud, and emerging technologies such as Extended Reality (ER), edge, 5G, and quantum computing
Centers of Excellence (CoE) / Innovation centers	Investment	Ongoing	Continuing to invest in innovation CoEs across North America and Europe as well as growth markets related to AI, cloud, security, interactive, and IoT to showcase innovation and cutting-edge digital technologies to clients
Generative AI	Investment	Ongoing	Made a US\$3 billion investment in cross-industry generative AI to offer new industry solutions and pre-built models
AI4BetterHearts	Initiative	2022	Joined AI4BetterHearts, a global data collaborative founded by Microsoft and the Novartis Foundation that aims to help stakeholders – from policy makers to patients – make better decisions about heart health and improve the overall population health

Accenture profile (page 4 of 4)

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 strong partner ecosystem through strategic partnerships with technology providers and hyperscalers such as Microsoft, AWS, and Google
- It excels in the payer value chain, with a focus on care and claims management. Accenture offers Accenture Health Insights Platform, a robust data analytics platform that helps state Medicaid, public health, and other agencies harness the power of data to rapidly generate insights and accelerate decision-making
- Accenture has also made significant digital investments, especially in the areas of cloud, AI/ML, and big data analytics. For example, they 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
- Accenture engages with various LoBs in the payer value chain, which includes commercial health plans and government plans

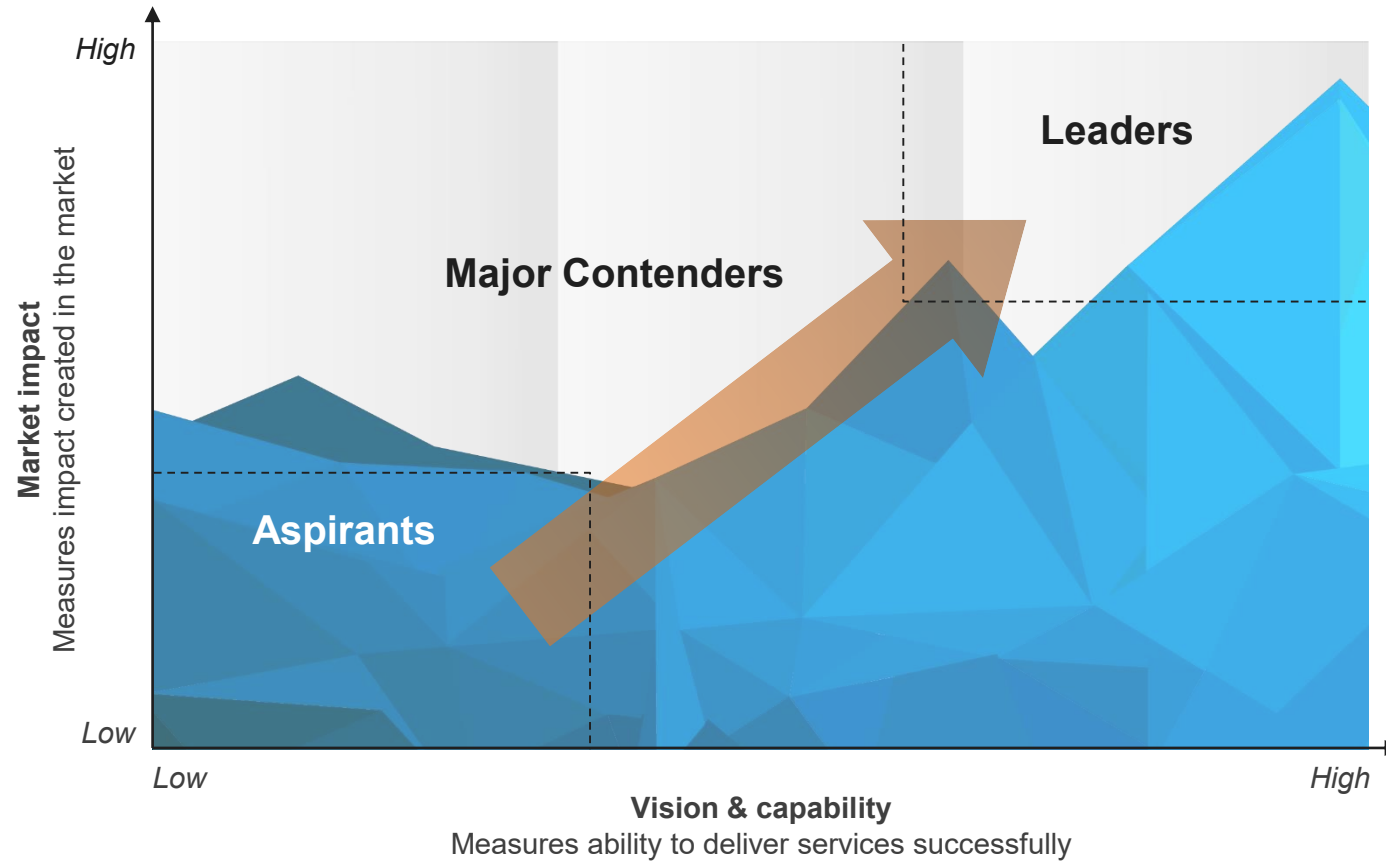
Limitations

- 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 a major presence among big health plans, it can look to increase its focus on small and midsize payers to increase its market presence
- While Accenture has made significant investments to enhance its generative AI capabilities in the areas of prior authorization and claims management, it can look to provide more proof points of successfully implementing generative AI in healthcare engagements

Appendix

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

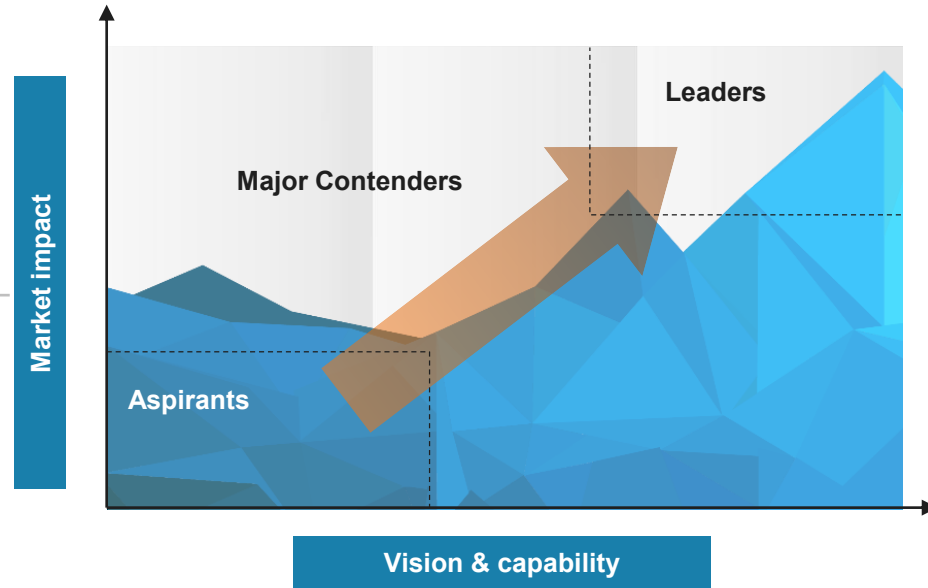
Everest Group PEAK Matrix



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



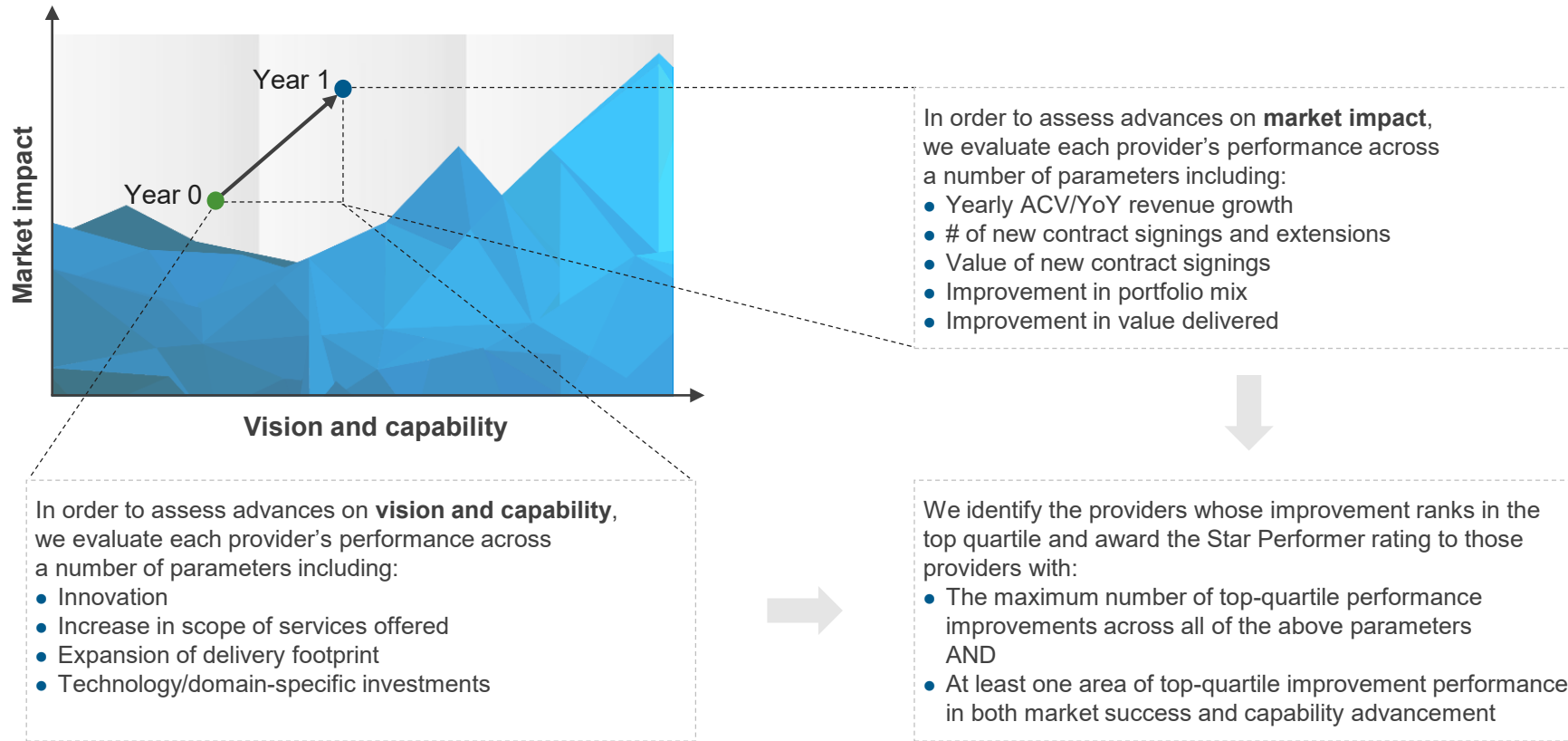
Measures ability to deliver services successfully. This is captured through four subdimensions

- 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

Everest Group confers the Star Performers title on providers that demonstrate the most improvement over time on the PEAK Matrix®

Methodology

Everest Group selects Star Performers based on the relative YoY improvement on the PEAK Matrix



The Star Performers title relates to YoY performance for a given vendor and does not reflect the overall market leadership position, which is identified as Leader, Major Contender, or Aspirant.

FAQs

Does the PEAK Matrix® assessment incorporate any subjective criteria?

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.

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

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.

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

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.

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

- 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

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

- 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](#)

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

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.



Everest Group is a leading research firm helping business leaders make confident decisions. We guide clients through today's market challenges and strengthen their strategies by applying contextualized problem-solving to their unique situations. This drives maximized operational and financial performance and transformative experiences. Our deep expertise and tenacious research focused on technology, business processes, and engineering through the lenses of talent, sustainability, and sourcing delivers precise and action-oriented guidance. Find further details and in-depth content at www.everestgrp.com.

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