



Everest Group PEAK Matrix[®] for Healthcare Provider Digital Service Provider 2023

Focus on NTT DATA
January 2023



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 present an assessment of 27 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 provider digital services market size and growth, digital services themes for healthcare providers, assessment of the service providers on several capabilities and market success-related dimensions, and Everest Group's independent remarks on service providers.

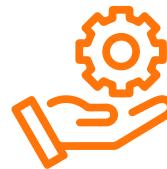
This report features the following 27 leading service providers on the [Healthcare Provider Digital Services PEAK Matrix® Assessment 2023](#):

- **Leaders:** Accenture, Cognizant, Deloitte, NTT DATA, HCLTech, Optum, and TCS
- **Major Contenders:** Atos, CitiusTech, DXC Technology, Emids, EPAM, GAVS, HTC Global Services, IBM, Infinite Computer Solutions, Mindtree, Persistent Systems, SoftServe, Tech Mahindra, and Wipro
- **Aspirants:** Apexon, Capgemini, Hexaware, Marlabs, Mphasis, and Virtusa
- **Star Performers:** CitiusTech, EPAM, HCLTech, and HTC Global Services

Scope of this report



Geography
Global



Providers
Healthcare provider



Services
Digital services

Healthcare provider digital services PEAK Matrix® characteristics

Leaders:

Accenture, Cognizant, Deloitte, HCL Tech, NTT DATA, Optum, and TCS

- Leaders have established themselves as front runners to support healthcare provider clients that look to service providers to help them achieve transformation through digital initiatives across various areas of the provider value chain such as patient engagement, care management, financials, and network management
- Leaders offer a good mix of solutions in their portfolios, create innovative digital use cases for healthcare firms, and continue to keep pace with the market dynamics through continued investments in technology and services capability development (internal IP/tools, CoEs, innovation centers, M&A, partnerships, etc.)
- Strategic acquisition of healthcare-specific organizations and significant investments in partnerships to strengthen their capabilities and further build verticalized digital offerings have turned out to be key differentiators for Leaders
- Enterprises prefer Leaders to be their strategic partners due to their strong healthcare experience and consulting expertise, understanding of the client's business, ability to execute large-scale projects, and a robust partner ecosystem
- However, in terms of both digital service capabilities and commercials, the existing Leaders are up against a tough battle from progressive Major Contenders. They must therefore concentrate on developing efficient solutions that take advantage of emerging technological trends and address the cost-takeout mandate

Major Contenders:

Atos, CitiusTech, DXC Technology, Emids, EPAM, GAVS, HTC Global Services, IBM, Infinite Computer Solutions, Mindtree, Persistent Systems, SoftServe, Tech Mahindra, and Wipro

- Major Contenders' service portfolios are not as balanced as those of Leaders and tend to be less comprehensive in provider value chain coverage. However, Major Contenders are trying to catch up to the Leaders by making investments (e.g., partnerships with niche vendors, and healthcare-specific IPs/tools) to scale up their offerings and increase the value proposition
- Major Contenders' focus on being more client-centric, enhancing domain expertise, and being flexible is well acknowledged by enterprises. Clients appreciate the quick responsiveness and accommodative nature of Major Contenders

Aspirants:

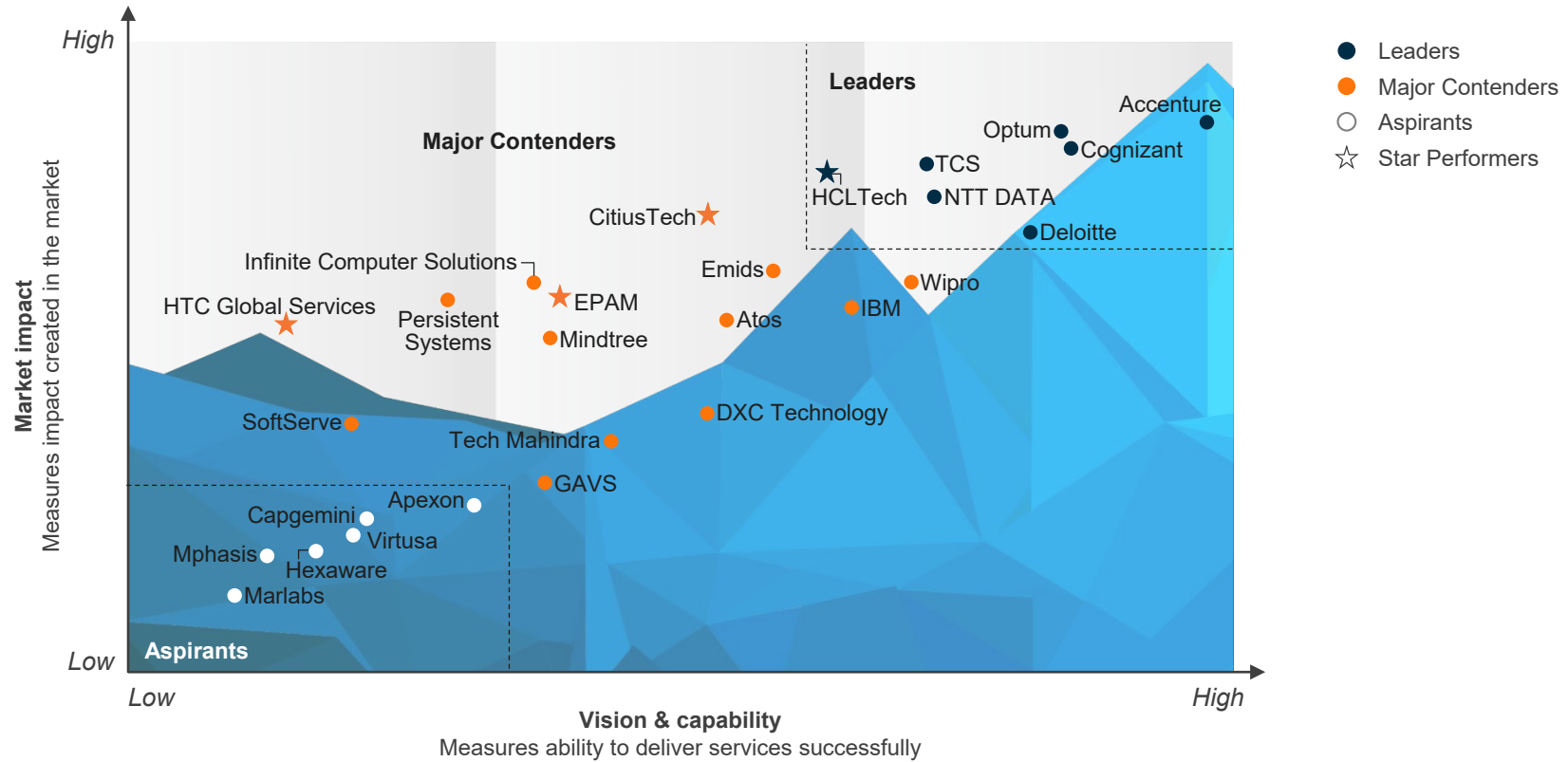
Apexon, Capgemini, Hexaware, Marlabs, Mphasis, and Virtusa

- 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
- To strengthen their vertical story and mindshare in the provider 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 2022 | NTT DATA positioned as Leader

Everest Group Healthcare Provider Digital Services PEAK Matrix® Assessment 2022^{1,2}



1 Assessments for Apexon, Atos, Capgemini, Deloitte, DXC Technology, Hexaware, IBM, and Virtusa exclude 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 healthcare buyers
 2 Analysis for Mindtree is based on capabilities before its merger with LTI

Source: Everest Group (2022)

NTT DATA | healthcare provider digital services profile (page 1 of 4)

Overview

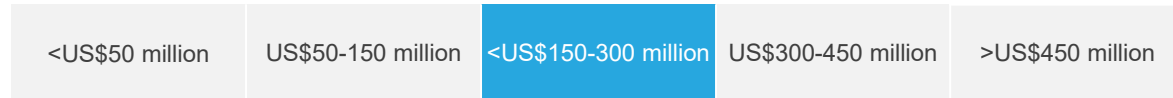
Company mission/vision statement

NTT DATA's healthcare global vision is to realize a society with healthy longevity, and secure and safe living using advanced technology while ensuring affordability and access. NTT DATA is committed to leading its customers through the transformation happening in the healthcare ecosystem today.

NTT DATA's vision and strategy for healthcare digital services revolves around helping healthcare providers execute digital transformation and reduce operational costs, integrating digital tools to enable member/patient and provider experience. It also focuses on driving digital engagement, empowering rapid end-to-end process automation by applying analytics, AI, and intelligent automation across the healthcare value chain.

It caters to clients that are financially challenged and require sourcing options that reduce cost while scaling and industrializing Work from Anywhere and Care from Anywhere models. Additionally, based on NTT DATA's new mid-term management plan to create value for the future and connect people with technology to realize a sustainable society together with customers and emphasize on contributing to ensure a stable healthcare delivery system from a bird's-eye view of digital healthcare.

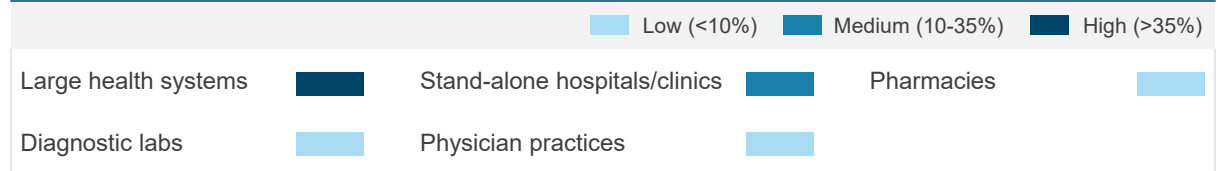
Healthcare provider digital services revenue



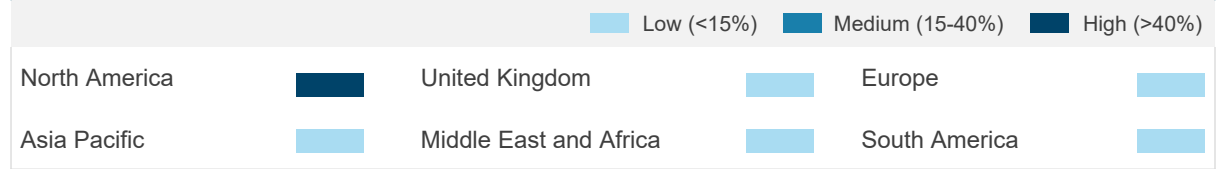
Key partnerships

- Microsoft
- AWS
- Google Cloud Platform (GCP)
- Salesforce
- Snowflake
- IBM
- Dell

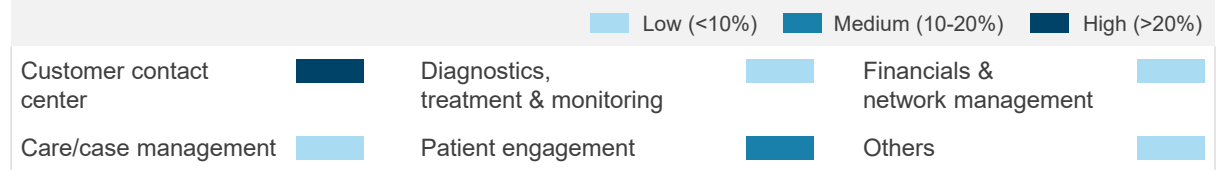
Revenue by line of business¹



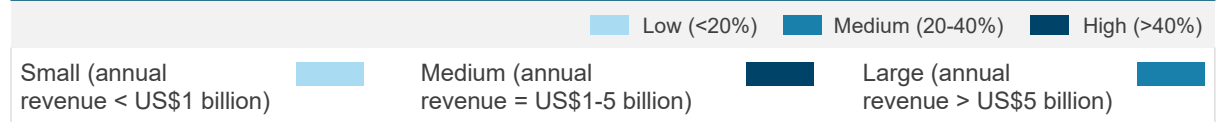
Revenue by geography¹



Revenue by value chain element¹



Revenue by buyer size¹



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

NTT DATA | healthcare provider digital services profile (page 2 of 4)

Offerings

NOT EXHAUSTIVE

Proprietary solutions (representative list)

Solution name	Details
Hospital at home	<ul style="list-style-type: none"> An integrated digital system architecture enables at-home acute care technologies to work with the hospital to deliver high-quality care
Intelligent scheduling	<ul style="list-style-type: none"> A consolidated health system calendar allowing patients and providers to schedule digitally, thus reducing call center and front-desk staff time
Digital front door	<ul style="list-style-type: none"> A humanized and coordinated patient engagement capability combining elements for a patient to interact with their care delivery network
Sepsis workflow management	<ul style="list-style-type: none"> A solution to improve the workflow associated with sepsis in the hospital setting to reduce mortality and improve documentation for reimbursement
Advocate AI	<ul style="list-style-type: none"> A solution for development of data extraction for unstructured diagnostic report data to support consulting on clinical operations; and potential revenue opportunities Pilot of data extraction for EMR data to support consulting on clinical operations; and potential revenue opportunities Expansion of tools for the provider to aid in the evaluation and deployment of AI for medical imaging
Digital accelerator (Nucleus for healthcare)	<ul style="list-style-type: none"> NTT DATA's digital accelerator to transform healthcare – a single platform for data integration, automation, and artificial intelligence. Nucleus Intelligent Enterprise Platform is at the core of its offerings and is the AI and automation engine that helps create smarter digital solutions – the key to building an intelligent enterprise Applying AI to organize, prioritize, and structure recommendations for addressing personalized care needs
Nucleus intelligent enterprise platform	<ul style="list-style-type: none"> An intelligent enterprise platform underpinning NTT DATA offerings and delivery of its services It is the strategic commitment to automation It helps clients use data and AI to automate their IT and business functions It brings together the best of its IP with third-party and open-source tools that it can easily configure for specific client needs
SMART Virtual Patient Observation (VPO)	<ul style="list-style-type: none"> A tool to improve the care of acutely/critically ill patients Easy-to-use and intuitive tool for ICU professionals, which simplifies comprehensive visualization of medical data in a single display Data interoperability with prescription, laboratory, medical image, or electronic health record platforms analytics and AI applications
Revenue cycle and BPO services	<ul style="list-style-type: none"> A solution for health providers to improve financial management and better comply with regulatory requirements Enhancement of financial performance, including strategic consulting and identifying opportunities for improvement Comprehensive services for management, maintenance, and support of hospital information systems Deep expertise in leading applications, including Kronos, Lawson, Epic, SAP, and others
Rev cycle management 360	<ul style="list-style-type: none"> Generates business value across six key drivers; revenue leakage, IT spending, RCM personnel costs, Net promoter scores, A/R days, and Employee experience RCM 360 can comprehensively address all RCM needs; through Standardization, Integrations, Upgrades, Support, and Streamlining

NTT DATA | healthcare provider digital services profile (page 3 of 4)

Recent developments










NOT EXHAUSTIVE

Key events (representative list)			
Development	Type	Year	Details
Hyperscaler alliance partnerships	Partnerships	2022	Partnered with alliance leaders and sales executives to grow its partner solutions, offerings, and pipeline with a focus on our its large enterprise partners, such as Microsoft, Amazon, and IBM
Investments in CoE and innovation centers	CoE	2022	Launched CoE Centro de Braga for digital health interoperability
Industry partner ecosystem	Partnership	2021	Invested in research, evaluation, legal, and marketing teams to align the needed industry capabilities with digital solutions and offerings
Investments in CoE and innovation centers	Innovation center	2021	Partnered with the State of Tennessee and the City of Nashville to open a Digital Innovation and Delivery Center in Nashville in 2021 with an investment of US\$9.9 million. The delivery center focuses on healthcare and manufacturing digital technology, including analytics and automation.
Investments in IP/patents/tools/solutions/frameworks	Solution	2021	Developed a prototype AI clinical research platform that will enable doctors to conduct AI clinical research using AI with distributed learning (federated learning) technology that can learn patient care data from multiple ICUs without taking it outside, thus ensuring security
Investments in IP/patents/tools/solutions/frameworks	Solution	2020	Launched a new consulting organization in 2020 and invested significantly in the expansion of its consulting practice. Additionally, toward the end of FY21, it merged its digital transformation services practice with the consulting practice. A key value play for the healthcare provider consulting organization is to provide vertical specificity to horizontal solutions.
Investments in IP/patents/tools/solutions/frameworks	Solution	2020	Launched advocate AI, which helps in development of data extraction for unstructured diagnostic report data and EMR data to support consulting on clinical operations, and potential revenue opportunities. It helps in expansion of tools for the provider to aid in the evaluation and deployment of AI for medical imaging.

NTT DATA | healthcare provider digital services profile (page 4 of 4)

Everest Group assessment – Leader

Measure of capability:  Low  High

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

- NTT DATA launched a new consulting organization in 2020 and has invested significantly in the expansion of its consulting practice, aiming to provide vertical specificity to horizontal solutions
- Clients mentioned domain expertise and client management as key strengths, appreciating quick responsiveness and leadership involvement
- It has a good mix of onshore and offshore resources to optimize the delivery portfolio according to the client
- NTT DATA has invested in healthcare-specific partnerships with cloud leaders, such as Microsoft, Amazon, and IBM

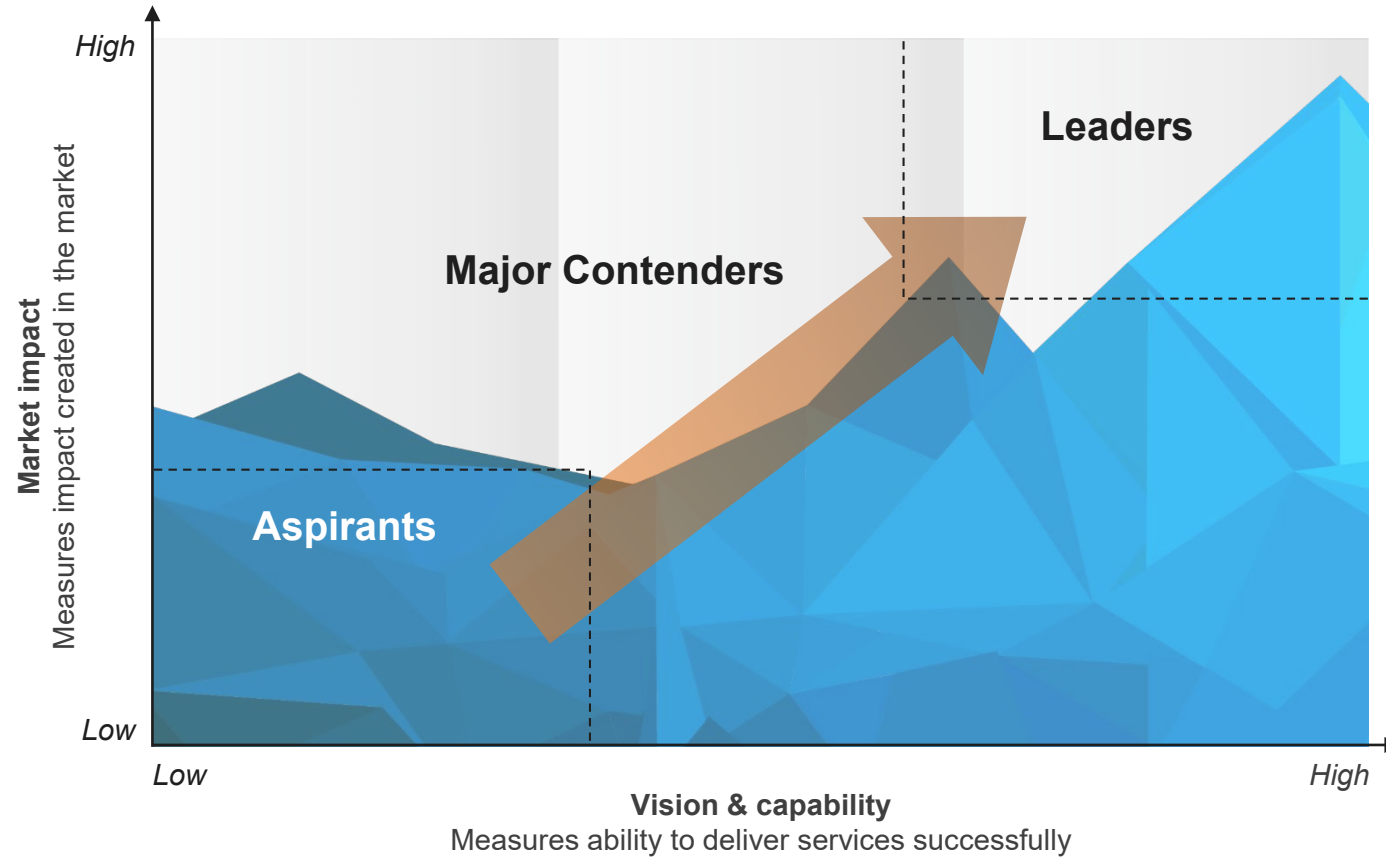
Limitations

- Clients expect NTT DATA to improve strategic partnerships with hyperscalers and platform vendors
- The company's price positioning is on the higher side. It should explore innovative pricing models such as outcome-based and risk-sharing models
- It should focus on enhancing thought leadership and investing in marketing efforts backed by relevant case studies and proof points to display its capabilities transparently in the healthcare space

Appendix

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

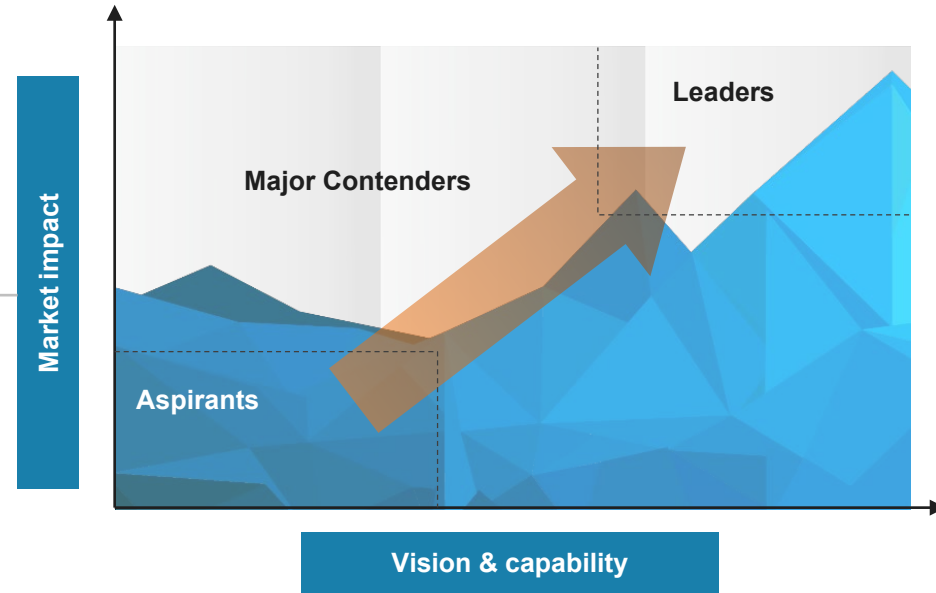
Everest Group PEAK Matrix



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



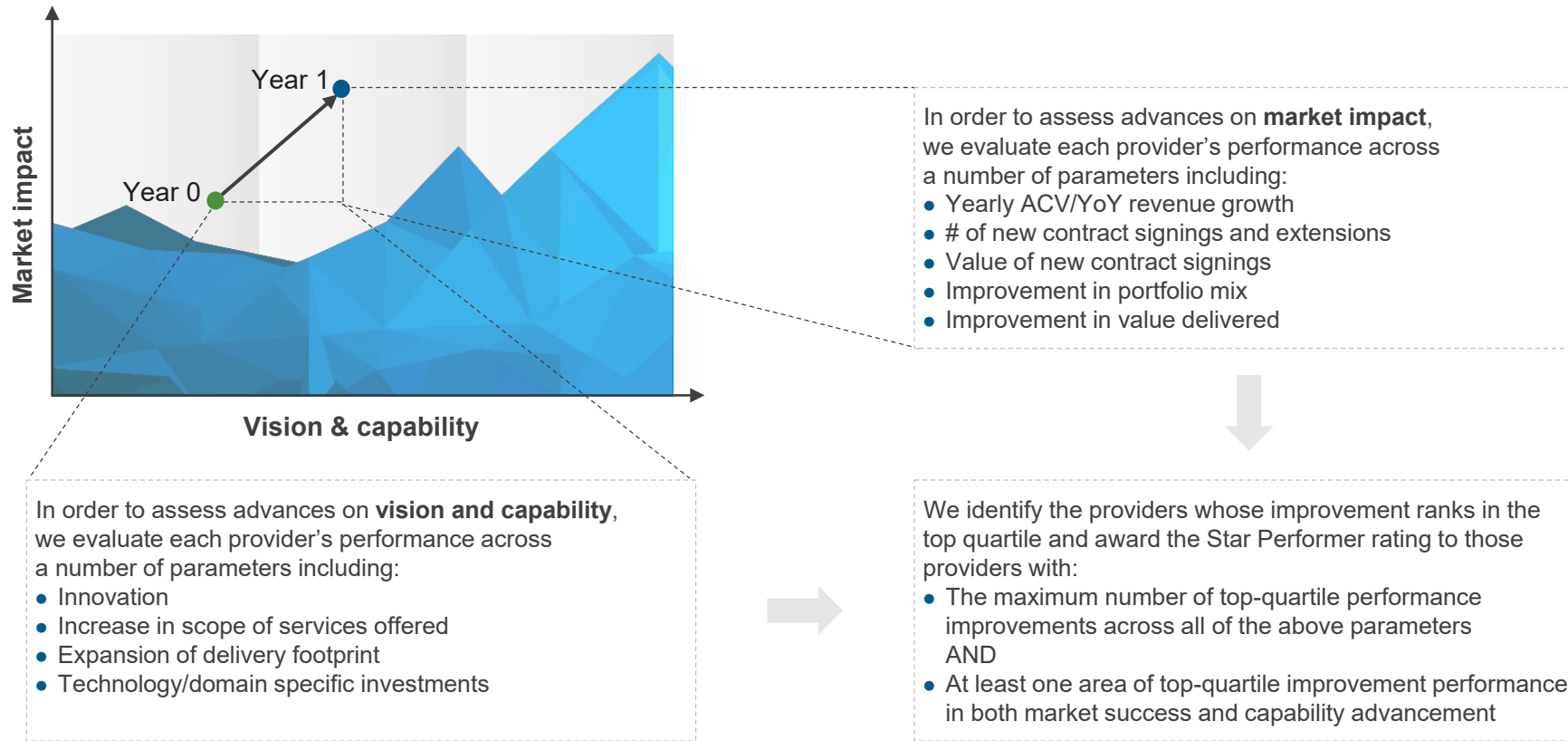
Measures ability to deliver services successfully. This is captured through four subdimensions

- 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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