ISG Provider Lens™

Healthcare Digital Services

Healthcare Cloud Migration Services

U.S. 2021

Quadrant Report

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

HEXAWARE

December 2021

About this Report

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The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of September 2021, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars ($US) unless noted.

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ISG Provider Lens™

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ISG Provider Lens™

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EXECUTIVE SUMMARY

Healthcare in the U.S. continues to be a difficult course to navigate, whether one is a provider or a consumer of related services. A combination of the ongoing pandemic, changing regulations, technological advances, rising costs and new entrants mean the choppy waters will continue into 2022. All these factors point to a growing need for service providers, such as the ones in this study, to plan and deliver the digital transformation services vital for healthcare companies to land safely. The data reflects that growth assertion. The ISG Index measured through Q3 2021 for the U.S. Healthcare and Pharma sector, annual contract value bookings shows the combined markets of managed services and "as a service" up by 10% to US$3.6 billion in 2021.

Looking across the findings for this study, ISG notes several overarching changes/themes that drive or affect digital transformation in healthcare: the COVID-19 pandemic, value-based care, information access and business model disruption. We discuss each below, identifying the associated uncertainties.

Learning from the COVID-19 pandemic, the U.S. healthcare system evolved in 2021, with increased focus on social determinants of health and healthcare equity, supply chain issues, workforce challenges, deferred/missed care and the long-term repercussions of COVID-19 on both patients and the healthcare ecosystem. Other uncertainties related to the pandemic include:

- Care complexity, including support for an increasing number of patients with chronic conditions that are not yet back to pre-pandemic conditions
- Unclear societal response to Delta, Omicron and other possible variants in the future
- Effects on balance sheets, assets and resources
- Insurance coverage and plan shifts

Value-based care continues to take center stage, with a growing focus on remote/virtual care, including telehealth. Related to this is the consumerization of healthcare, with more convenience and easy access to information and services. Concurrently, mental health issues have become more visible with growing recognition that healthcare needs to address the overall well-being of those affected, by considering physical as well as emotional well-being. Patient-centric care using digital tools continues to spread and gain significance, for both healthcare personalization and enhanced data collection. These tools are improving with the use of AI and real-time analytics, but they still need integration with in-person care (Figure 1). Another aspect of value-based care is the emergence of payment models not dependent on insurance such as the direct primary care model. Future uncertainties around value-based care include:

- Data-related issues, including transparency, privacy, algorithm bias and data fragmentation/consistency
- Equity of access for those with limited broadband or lack of modern connected technologies
- Delivery of care to an aging population
- Consistency of reimbursement for remote care
- Risk sharing between payers and providers

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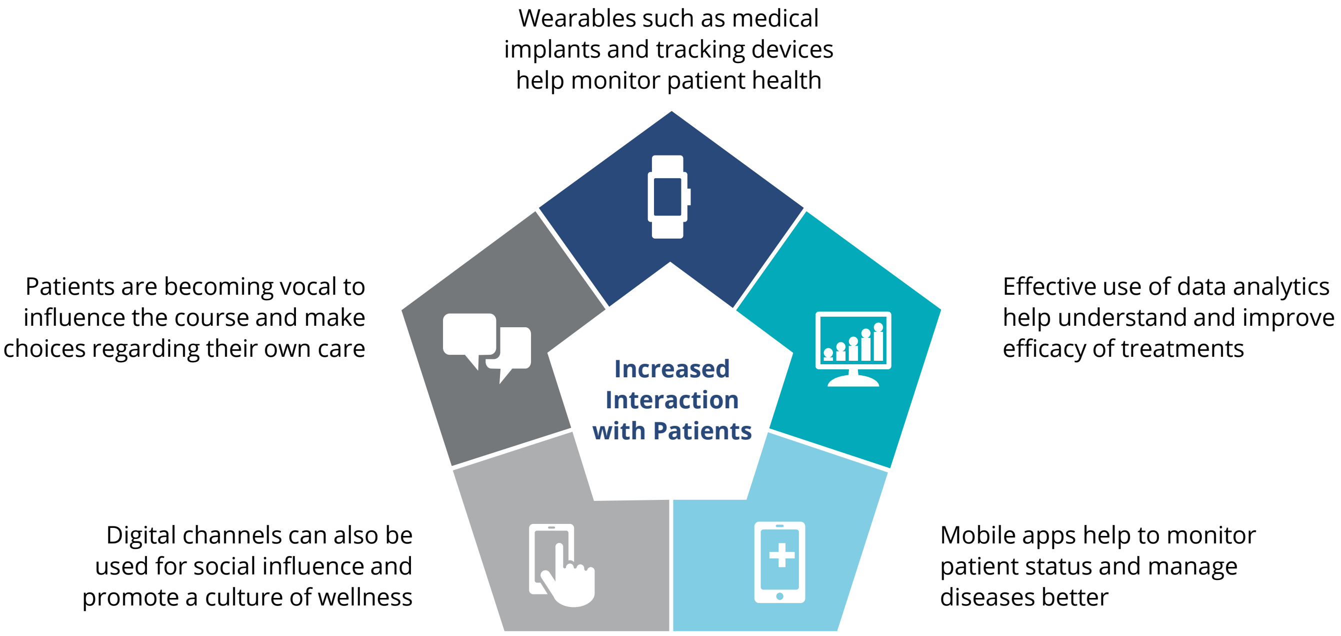
Fig 1

Healthcare Uses Analytics and IoT to Personalize Engagement

Use of technology including analytics and IoT to personalize healthcare is gaining traction



Source: ISG Research.

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Wrapped up with the pandemic and value-based care is the need to access and share medical information that can help improve patient expectations and outcomes. In the U.S., the healthcare system is evolving to ensure cost transparency to consumers and enable improved access to medical data needed by the various stakeholders (including the patient) involved in patient care. The federal government has mandated some access and sharing regulations that rely on improving interoperability. In this study, ISG asked service providers about their interoperability services. Although these providers offer expert advice and tools, the uptake of interoperability services in 2021 was less than expected. The uncertainties that continue to plague interoperability are related to the following:

- The magnitude of regulatory oversight concerning the future of healthcare, at all government levels
- Enforcement of additional regulations and standards
- Clarification on government and industry requirements related to reporting and quality measures
- Access of legacy health tech solutions and data, some of which is moving to cloud platforms

The final category of major change in the healthcare ecosystem is the continuing disruption triggered by technology companies, retailers, telecom providers and banks, as well as consolidations via mergers and acquisitions. Basic primary care is being provided by big-box stores and pharma chains. Provider and employer arrangements with payers are changing the nature of partnerships with insurance companies, or "payviders" as they are now often described. Future uncertainties in the ecosystem include the long-term commitment of new entrants, the market responses to them, and the outcomes of the mergers and acquisitions.

The four categories of change (mentioned above) lead to the following challenges in digital transformation for payers and healthcare providers:

- **Regulation:** Government oversight, deadlines and modifications require significant attention. Payers and healthcare providers continue to modify business practices involving information exchange and delivery of electronic health information.
- **Technology:** Systems in healthcare reflect complexity, disparity, aging and disconnection. The result is fragmented patient member data that is untenable for digitization.
- **Financial ambiguity:** Demographic shifts and lifestyle changes are intensifying cost pressures on healthcare systems. The losses related to COVID-19, among hospitals and other healthcare providers, have been substantial. Payers find it difficult to predict their costs and revenue. All entities continue to search for operational cost takeout.
- **Organization change management:** Healthcare organizations resist change, avoid risks and suffer technical debt. The industry has complex processes and multifaceted product mixes. Another layer of risk management is related to privacy and security requirements and concerns.

This study reveals that many service providers are available to help healthcare organizations with these challenges. The companies have the skills, industry expertise, tools and partnerships to assist in healthcare digital transformation. Across this cohort of service providers, the study affirms experience in several key areas:

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- **Business and engineering transformation:** ISG notes that despite the availability of these services, healthcare clients focus predominantly on tactical versus strategic initiatives. Nonetheless, market dynamics are compelling healthcare payers and providers to reassess their roles, which is expected to lead to the engagement of more strategic services in 2022.
- **Healthcare domains:** Expertise is available in healthcare markets, care coordination, partnerships, platforms and technologies (including advanced/emerging ones). ISG sees that the healthcare market underestimates service provider capabilities. However, with growing awareness of market complexities, ISG expects healthcare companies to seek an increasing number of services from providers that understand and can help manage this complexity.
- **Interoperability and integration:** Service providers offer approaches and solutions that address the mandates and also go beyond to offer added value through their integration capabilities. Here, too, ISG notices that the market is slow in seeking services despite the existing mandates but expects demand to pick up momentum in 2022.
- **Modernization:** Technology solution modernization, replacement and cloud migration are among the fastest growing initiatives in the healthcare ecosystem. ISG observes that many healthcare organizations and service providers focus on the “digital front door” to give people access to services. Such apps and portals drive digital transformation activities built on existing and new infrastructures.
- **Centers of excellence:** Leading service providers for healthcare have centers of excellence that consolidate expertise, technology and research. Some offer centers of excellence for leading electronic health record (EHR) systems. ISG also sees large investments by service providers in next-generation tools and intellectual property, including patents, grants, frameworks, benchmarks and accelerators. Centers of excellence are innovating in areas such as the Internet of Medical Things (IoMT), automation, AI and analytics.

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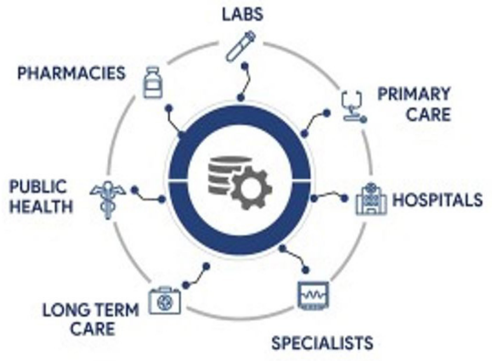
Fig 2

Interoperability in U.S. Healthcare

Challenges in Healthcare

- Inconsistent patient records
- Lack of standards for sharing information between health systems
- Information blocking by vendors
- Operational and technological complexity

Interoperability



Benefits of Interoperability

- Reduced medical errors and improved outcomes
- Improved staff productivity
- Enhanced patient security and experience
- More transparency in providers and payer communication
- Low healthcare expenses

July 2021

CMS Payer Policies

- Patient access through APIs
- API access to published provider directory data

January 2022

CMS Provider Policies

- Public reporting and information blocking
- Digital contact information
- Admission, discharge and transfer event notifications

December 2022

ONC Policies

- Adoption of the USCDI
- Application Programming Interfaces
- Security Tags and Consent Management

December 2023

ONC Policies

- Electronic Health Information (EHI) Export

Source: ISG Research, Centers of Medicare & Medicaid Services (CMS), Office of the National Coordinator (ONC)

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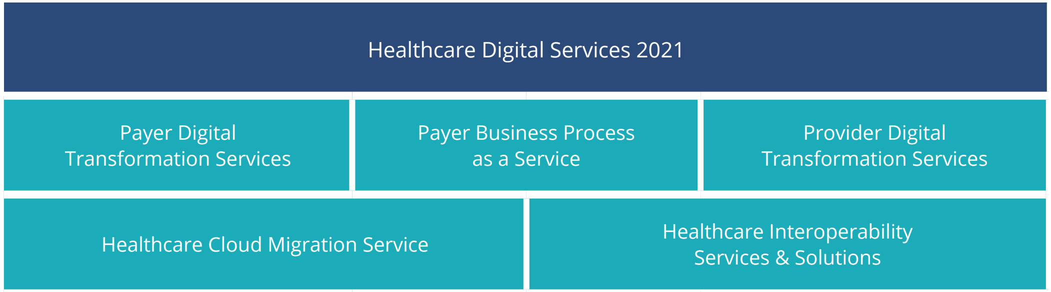
Introduction

Simplified illustration



Source: ISG 2021

Definition

The healthcare industry continues to be under pressure to change. In 2021, the pandemic and public demand for more effective outcomes mandate actions to better meet care lifecycle requirements and build patient-centric business models. All segments of the healthcare industry are being compelled to comply with new regulations, engage in competitive mergers and acquisitions, and adapt to the needs of an aging population. Also, consumers expect advanced and convenient digital service delivery. At the same time, many companies are struggling to stay apace with the growing demand for their services and mounting competitive pressures.

As companies adopt new business approaches in keeping with the changing market environment, regulatory hurdles and cost pressures are at an all-time high. The competitive landscape has never been more dynamic or universal. In this context, innovation is imperative. The explosion of virtual care in 2020 led to the rapid increase in connected technology deployments for telehealth, a trend that ISG expects will continue.

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Definition (cont.)

Achieving interoperability is key to expanding not only virtual care, but also modernizing overall healthcare. In the U.S., the Office of the National Coordinator for Health Information Technology (ONC) and the Centers for Medicare & Medicaid Services (CMS) have created structured data standards and other mandates that electronic health records (EHRs) must adhere to. CMS and ONC guidelines require that patients have access to their healthcare data and provider directories via application programming interfaces (APIs). Other new regulations on interoperability address security; payer-to-payer data exchange; and admission, discharge and transfer event notifications.

In the U.S. almost half of the population is a part of the public healthcare program, a growth from about one-third since before the COVID-19 pandemic. This shift means payers are enrolling and catering to more people than ever through Medicaid for the low-income group, Medicare for seniors and the disabled, and the Child Health Insurance Program (CHIP) for children that do not qualify for Medicaid.

Successful organizations in the healthcare industry have been meeting these challenges with the following:

- Driving targeted investments and continuous cost control
- Using advanced technologies and digital operating models
- Focusing on improved and innovative patient engagements
- Building, buying and improving data sharing processes and tools
- Shifting to digital platforms for rapid modernization and adjustment to changing care environment

Digital transformation helps combat many of the ongoing and anticipated industry challenges. In the healthcare industry in the U.S., digital transformation of services helps payer and provider segments evolve to better serve their constituents. As healthcare payers and providers are

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Definition (cont.)

shifting the focus of purchase decisions to business outcomes, finance and other business leaders are driving digital transformation. While some enterprises do it on their own, others use business process-as-a-service (BPaaS) solutions.

Participating service providers in the Healthcare Digital Services 2021 study are evaluated on how effective they are as an extension of a client's technology organization and involved in creating blueprints, architecture frameworks and management processes. They are assessed on factors such as brand recognition in the markets studied, market reach, and the number and quality of clients. In addition, they are evaluated on thresholds of annual revenue, assigned employee numbers/skills and R&D investments.

Scope of the Report

The ISG Provider Lens™ study offers technology decision makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments
- Perspective on different markets

Our study serves as an important decision-making basis for positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current vendor relationships and potential engagements.

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Provider Classifications

The provider position reflects the suitability of IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions IT providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between US$20 million and US$999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above US$1 billion, with activities worldwide and globally distributed decision-making structures.

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Provider Classifications

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly.

Leader

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Product Challenger

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Market Challenger

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

Contender

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in both products and services and a sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

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Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star. Number of providers in each quadrant: ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

Rising Star

Rising Stars have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not In

The service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

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Healthcare Digital Services - Quadrant Provider Listing 1 of 3

	Payer Digital Transformation Services	Payer BPaaS Services	Provider Digital Transformation Services	Healthcare cloud migration services	Healthcare Interoperability Services & Solutions
2nd Watch	Not In	Not In	Not In	Contender	Not In
Accenture	Leader	Leader	Leader	Leader	Not In
Allscripts	Not In	Not In	Contender	Not In	Not In
Atos	Product Challenger	Not In	Leader	Rising Star	Product Challenger
Birlasoft	Not In	Not In	Contender	Not In	Not In
Capgemini	Product Challenger	Not In	Not In	Leader	Leader
Cerner	Not In	Not In	Leader	Market Challenger	Not In
CGI	Contender	Not In	Not In	Not In	Not In
CitiusTech	Not In	Not In	Not In	Product Challenger	Rising Star
Coforge	Product Challenger	Not In	Not In	Product Challenger	Product Challenger
Cognizant	Leader	Leader	Leader	Leader	Leader
Conduent	Rising Star	Rising Star	Not In	Not In	Product Challenger
Deloitte	Contender	Not In	Market Challenger	Not In	Not In

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Healthcare Digital Services - Quadrant Provider Listing 2 of 3

	Payer Digital Transformation Services	Payer BPaaS Services	Provider Digital Transformation Services	Healthcare cloud migration services	Healthcare Interoperability Services & Solutions
DXC	Product Challenger	Not In	Contender	Not In	Not In
emids	Product Challenger	Not In	Product Challenger	Not In	Not In
EPAM	Product Challenger	Not In	Product Challenger	Not In	Not In
EXL	Leader	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Firstsource	Leader	Rising Star	Not In	Not In	Not In
GAVS	Contender	Not In	Product Challenger	Contender	Contender
Genpact	Market Challenger	Leader	Contender	Not In	Not In
HARMAN	Contender	Not In	Contender	Product Challenger	Product Challenger
HCL	Leader	Not In	Leader	Leader	Leader
Hexaware	Product Challenger	Not In	Product Challenger	Leader	Not In
IBM	Leader	Not In	Leader	Not In	Market Challenger
Infinite	Leader	Product Challenger	Product Challenger	Leader	Leader
Infosys	Leader	Market Challenger	Rising Star	Leader	Leader

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Healthcare Digital Services - Quadrant Provider Listing 3 of 3

	Payer Digital Transformation Services	Payer BPaaS Services	Provider Digital Transformation Services	Healthcare cloud migration services	Healthcare Interoperability Services & Solutions
LTI	Product Challenger	Not In	Not In	Not In	Not In
Mindtree	Product Challenger	Not In	Product Challenger	Product Challenger	Product Challenger
Mphasis	Product Challenger	Product Challenger	Contender	Contender	Not In
NTT DATA	Leader	Leader	Leader	Leader	Leader
Optum	Leader	Product Challenger	Leader	Not In	Not In
Persistent Systems	Product Challenger	Not In	Product Challenger	Product Challenger	Product Challenger
Sutherland	Contender	Not In	Contender	Not In	Not In
TCS	Leader	Product Challenger	Leader	Leader	Leader
Tech Mahindra	Product Challenger	Contender	Leader	Product Challenger	Rising Star
UST	Leader	Leader	Product Challenger	Product Challenger	Contender
Virtusa	Contender	Not In	Not In	Contender	Product Challenger
Wipro	Leader	Leader	Leader	Leader	Leader

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Healthcare Digital Services Quadrants

ENTERPRISE CONTEXT

Healthcare Cloud Migration Services

This quadrant report is relevant to healthcare payers and providers enterprises in the U.S. for evaluating suppliers of cloud migration services.

ISG highlights the current market positioning of service providers that offer healthcare cloud migration solutions to healthcare payers and providers in the U.S. and how each service provider addresses the key challenges faced in the region.

The healthcare industry is on an innovation journey toward providing high-quality digital health. Many healthcare organizations, payers and providers are looking at transitioning to the cloud to securely store enormous volumes of records in a flexible yet cost-effective method. Today, healthcare cloud migration is in full swing with providers worldwide using the cloud to manage emails and electronic medical records (EMRs) efficiently and make real-time data accessible to healthcare professionals.

Service providers in the healthcare cloud migration space have a well-defined framework for healthcare payers and providers to migrate their legacy systems to the cloud. With the rising concern about patients' data security, service providers are enhancing their security capabilities along with acquiring the required security standards certifications. This transformation journey is led by the cloud computing aspect.

Healthcare professionals and IT and technology leaders should read this report to understand the relative positioning and capabilities of service providers and thus effectively plan and select the appropriate services and solutions. The report also shows how the technical and integration capabilities of a service provider and its market presence compare with the rest of the market.

Digital transformation professionals should read this report to understand how suppliers of digital transformation services for healthcare providers fit in with their initiatives and how they compare with one another.

Government, procurement and vendor management professionals should read this report to develop a better understanding of the current landscape of providers offering digital transformation services to healthcare providers in the U.S.

Security leaders should read this report to see how service providers address the significant challenges of compliance and security without compromising the patient experience.

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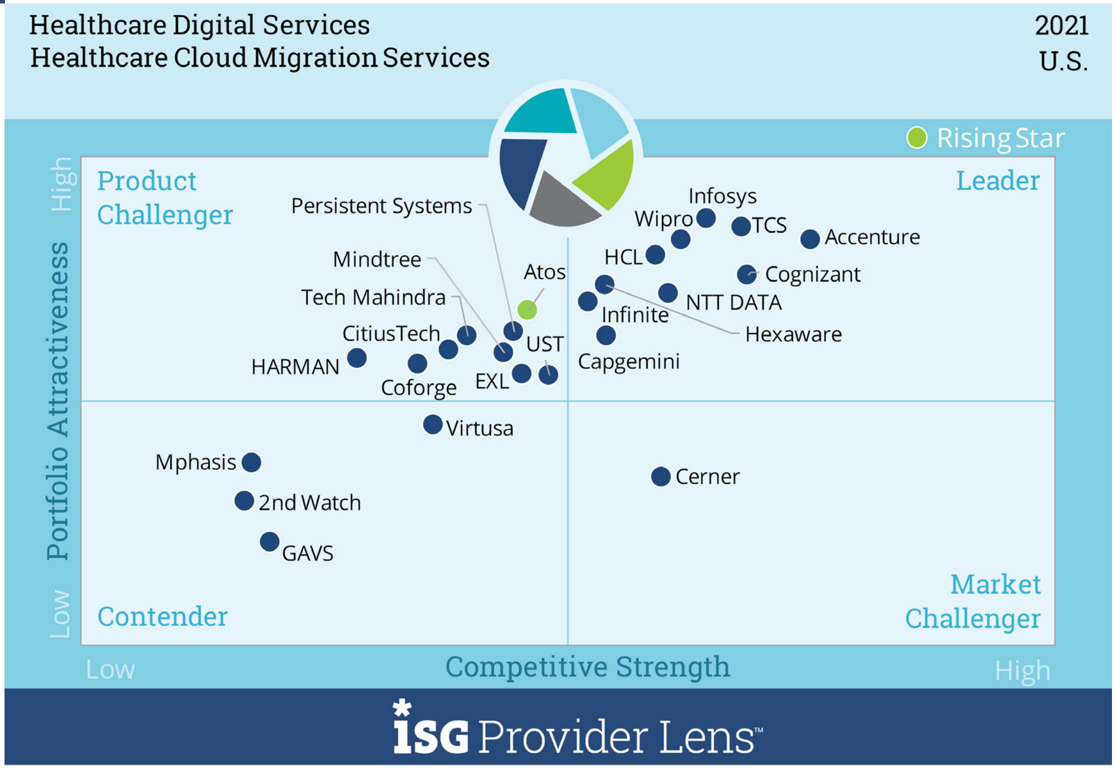
HEALTHCARE CLOUD MIGRATION SERVICES

Definition

Introduced in 2021, this new quadrant assesses a service provider's ability to deliver services to U.S. healthcare providers and payers that take advantage of hyperscaler platforms. Some of the cloud platforms — including AWS, Google, Microsoft, IBM, Oracle and Salesforce — offer healthcare-specific capabilities. The services should help payers and providers modernize their systems to improve processes and business outcomes.



Source: ISG Research 2021

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HEALTHCARE CLOUD MIGRATION SERVICES

Eligibility Criteria

- Platform consulting for the use of the appropriate emerging healthcare technologies, with the ability to plan, develop and implement consumer-grade interfaces of employee systems and patient and member information services, including mobile apps
- Established partnerships with one or more hyperscalers and employees with appropriate skills
- Contracts for services with payer and provider clients in the U.S., both in progress and planned
- Experience using specific healthcare tools offered by the cloud platforms, including AWS for Health, Google Health, Microsoft Healthcare Cloud, IBM Watson Health, Oracle Health Insurance and Salesforce Health Cloud
- Ability to provide consultation services for the development of custom capabilities on the platforms
- Experience with related offerings (for example, AI, machine learning and IoT) from the hyperscalers and in other industries

Observations

- **Accenture** focuses on rapid cloud migration at scale through its cloud-first initiative.
- **Capgemini's** customized cloud portfolio in healthcare centers on patient experience enhancement.
- **Cognizant** leverages its 6R analysis to help healthcare clients migrate to the cloud.
- **HCL** provides innovative cloud migration services for healthcare clients through its cloud smart solution.
- **Hexaware's** cloud migration offering in healthcare is a combination of agility and experience.
- **Infinite** is dedicated to improving bulk cloud migration for healthcare clients through its multi-cloud management platform.
- **Infosys** delivers next-gen cloud migration capabilities in healthcare by leveraging its strategic partner ecosystem.
- **NTT DATA** helps its healthcare clients migrate to the cloud through its Nucleus cloud management platform.

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HEALTHCARE CLOUD MIGRATION SERVICES

Observations (cont.)

- **TCS** focuses on enhancing the cloud infrastructure of its healthcare clients.
- **Wipro** heavily invests in improving its overall capabilities in cloud technologies.
- **ATOS** (Rising Star) is committed to expanding its partner ecosystem in the cloud migration domain.

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HEXAWARE

Overview

Hexaware, headquartered in Mumbai, India, is a global IT consulting provider with a strong focus on cloud-based solutions. It offers application transformation management solutions, including cloudification of applications, API and integration, delivery, application management services, business intelligence and analytics. Hexaware has shown significant growth in recent years, with a particular focus on the healthcare and life sciences segment. Hexaware employs about 20,000 people across 30 countries.

Strengths

Large migration experience: In one of the largest cloud migrations in the healthcare industry, Hexaware helped IQVIA with cloud service provider selection, migration planning, building a landing zone and performing the migration of more than 15,000 servers across 14 data centers. The migration added speed and automation with significantly reduced implementation costs.

Speed of execution: Using orchestration with automation, Hexaware accelerates application deployments in its cloud migrations. The methods used include automated end-to-end release of virtual machines ready for application deployments, with automated patching each month to significantly reduce the need for human effort and time. Other savings are achieved through automated firewall rule configuration that enables shift from a Tier 3 workforce to a Tier 1 workforce.

Migration framework for payers: Amaze for Payers is a smart migration framework to help evaluate and move on-premises, legacy payer data to the cloud at the lowest risk and expense — with minimal downtime — while implementing business intelligence and establishing an AI architecture.

Caution

Hexaware needs to continue to improve its agility as it competes with some of the largest and most established service providers in the U.S. healthcare payer market.

2021 ISG Provider Lens™ Leader

Hexaware combines agility, speed of execution, a comprehensive migration framework and cloud migration experience to make its offering attractive to U.S. healthcare payers.

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Methodology

METHODOLOGY

The research study “ISG Provider Lens™ 2021 – Healthcare Digital Services 2021” analyzes the relevant software vendors/service providers in the U.S. market, based on a multi-phased research and analysis process. It positions these providers using ISG Research methodology.

The study was divided into the following steps:

1. Definition of the Healthcare market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Use of ISG’s internal databases and advisor knowledge and experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts and figures received from providers and other sources.
6. Use of the following key evaluation criteria:
   - Strategy & vision
   - Innovation
   - Brand awareness and presence in the market
   - Sales and partner landscape
   - Breadth and depth of portfolio of services offered
   - Technology advancements

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Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor. Now as a research director, principal analyst and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

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