ISG Provider Lens®

Healthcare Digital Services

Evaluating the innovation, integration and impact of digital transformation within healthcare ecosystems

Customized report courtesy of:

Deloitte.

QUADRANT REPORT | DECEMBER 2025 | U.S.

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Economic, demographic and technology shifts are rewriting the U.S. healthcare playbook

The U.S. healthcare environment is undergoing a structural shift as economic pressure, demographic change and technological acceleration reshape how payers, providers and life sciences organizations operate. With healthcare already representing 17 percent of the region's GDP and advancing toward a 20 percent share by 2032, rising medical demand is paralleled by an unprecedented expansion in technology investment. Aging populations and the growing burden of chronic disease are increasing healthcare consumption, while intensifying cost pressures are heightening the urgency for new digital operating models that reduce friction and enable more sustainable delivery.

Financial strain is pervasive. Payers face reimbursement contraction and operational inefficiencies that directly impact profitability. Providers contend with persistent clinician shortages, growing technical debt, revenue cycle challenges and increasing cyber vulnerability. Across both segments, scarcity of specialized talent in cloud, security, data engineering and AI is elevating the role of external partners and accelerating the shift to managed services and BPaaS models. These models offer scalability and predictable costs, helping enterprises transition from capital-intensive modernization to more agile OpEx-aligned strategies.

Regulatory momentum adds another layer of transformation. Interoperability requirements, privacy mandates and transparency rules are reshaping how data is exchanged, governed and secured. What was once approached as compliance-driven technical integration is now a market-level mandate for real-time, FHIR-native data liquidity. The rise in cyberattacks targeting protected health information (PHI) further strengthens zero trust architectures, continuous monitoring and recovery assurance as operational imperatives rather than IT features.

AI, cloud, interoperability and advanced security are converging to transform **healthcare's digital foundation.**

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Layered onto these forces is the rapid rise of AI, particularly generative and agentic approaches, which has moved from experimental pilots to embedded enterprise capabilities. AI-led digital engineering, productization of IP and intelligent automation are pushing the industry toward an AI-native paradigm where the technology is not merely a supplement but a foundation for how healthcare organizations interact, analyze and evolve. This shift represents a profound repositioning of digital healthcare, from digitized workflows to intelligent, adaptive systems capable of scaling across clinical, administrative and operational domains.

How healthcare enterprises are redefining digital transformation

Across the ecosystem, payers, providers and medical technology firms are converging on a transformation blueprint defined by AI-first modernization, frictionless data ecosystems and experience-led design. This shift reflects a decisive pivot toward operationalized intelligence, where the goal is not to deploy more technology but to reimagine core processes around automation, prediction and interoperability.

AI is becoming the backbone of enterprise reinvention. Administrative processes such as claims, prior authorization, utilization review, coding, denials and revenue cycle management are transitioning from manual-heavy workflows to governed, agentic systems that self-optimize performance. Predictive models have expanded from narrow disease-specific analytics to broad population-level insights that allow organizations to identify risks earlier, drive personalized outreach and manage medical costs more proactively. Conversational analytics and natural-language interfaces empower clinicians, care managers and administrative teams to interact directly with enterprise intelligence, without reliance on technical intermediaries.

Modernization priorities emphasize composable, cloud-native architectures that unify clinical, operational and financial datasets into contextual, longitudinal views. Event-driven integration, API-led interoperability and Trusted Exchange Framework and Common Agreement (TEFCA)-aligned frameworks support real-time intelligence sharing between payers and providers, enabling more coordinated care, transparent decision-making, and smoother patient and member experiences. This architecture is essential to supporting the shift toward value-based models, which depend heavily on contract modeling, forward-looking analytics, cohort segmentation and predictive interventions.

Enterprises are also prioritizing consumer experience as a strategic lever. Digital front doors, omnichannel communication, voice-driven interactions and proactive nudging are redefining how members and patients navigate their health journeys. The aim is to reduce complexity and increase trust, helping consumers navigate care decisions more intuitively, while alleviating the administrative strain on frontline teams.

Security and governance underpin the entire transformation narrative. With the rise of agentic AI and federated data exchange, organizations are embedding privacy-by-design, enhancing identity management and operationalizing AI observability to ensure transparent, safe and compliant use of ML models, large language models (LLMs) and agentic decisioning systems.

Zero trust principles, rapid recovery structures and cyber resilience architectures are now foundational, as healthcare organizations recognize that digital trust is inseparable from digital transformation.

Enterprises increasingly expect partners to deliver platforms, governed AI and data foundations that support both current operations and long-term transformation. This expectation is reshaping procurement strategies toward outcome-based models, vendor rationalization and deeper strategic partnerships that combine operational scale with innovation-led reinvention.

Shifting provider ecosystem and emerging patterns of differentiation

The healthcare services provider landscape is evolving into a more segmented, capability-driven ecosystem, defined by maturity in cloud engineering, AI, interoperability, security and domain expertise. While competitive intensity remains high, clear patterns of differentiation emerge as providers architect for governed, AI-native digital operations.

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A cohort of platform-centric integrators has taken the lead in large-scale modernization and enterprise-grade transformation. These providers have substantial expertise in constructing cloud-based, FHIR-compliant data platforms, operationalizing agentic AI and securing highly regulated environments. Their strength lies in combining technology stewardship with deep healthcare domain fluency, enabling them to address complex payer-provider convergence, enterprise automation and modernization of legacy estates.

A second group is characterized by deep operational domain specialization, particularly across claims, revenue cycle management, payment integrity and business process services. These providers distinguish themselves through domain-trained AI models, high levels of automation maturity and rapid ability to deliver cost savings and performance improvements. Their experience with multigeneration outsourcing contracts positions them well to support clients consolidating services and shifting toward integrated, outcome-driven engagements.

The third group consists of engineering-led organizations that are productizing accelerators, building domain IP and applying digital engineering techniques to clinical and medical device environments. As intelligence becomes embedded into devices and care-delivery infrastructures, these firms gain relevance by offering multitenant architectures, modular components and rapid deployment mechanisms.

Across the spectrum, providers are investing in AI governance, cybersecurity, cloud modernization and FHIR-native interoperability. Many have established dedicated innovation hubs, interoperability factories, cybersecurity centers and talent academies to scale capabilities. Strategic alliances with hyperscalers, EHR vendors and emerging health-technology innovators enable faster cocreation and shorter time-to-value for clients seeking modernization under tight regulatory and financial constraints.

The competitive environment is shifting toward fewer, deeper partnerships. Enterprises increasingly favor providers that can run and transform simultaneously, offer outcome-linked pricing, and demonstrate measurable improvements in quality, cost, experience and equity. Providers that can prove lineage-aware governance, real-time data liquidity and transparent AI impact are emerging as the preferred partners for the next wave of healthcare transformation.

The road ahead: building an AI-native, connected, trusted healthcare future

The next phase of digital healthcare transformation will be defined by the emergence of fully AI-native operating models, broader interoperability and a strategic shift toward secure, outcome-oriented ecosystems. As generative and agentic AI capabilities mature, organizations will move beyond augmenting workflows toward orchestrated systems that continuously learn, adapt and optimize across administrative, clinical and financial domains.

In this new environment, interoperability becomes a precondition for innovation rather than a compliance obligation. FHIR-native data exchange, event-driven architectures and unified longitudinal datasets will underpin real-time intelligence and collaborative payer-provider ecosystems. Likewise, zero trust security, encrypted data sharing and end-to-end model governance will define trustworthiness in an era where PHI moves more fluidly across enterprise and ecosystem boundaries.

Enterprises that prioritize stabilization of cybersecurity and data foundations, rationalize platforms and adopt governed AI at scale will be positioned to accelerate modernization without compromising safety. Managed services and BPaaS models with outcome-based pricing will gain prominence as enterprises seek partners with the ability to deliver measurable improvements in clinical and financial performance, while reducing the TCO.

For providers, the opportunity lies in operationalizing their investments in interoperability, cloud and AI governance; productizing accelerators; expanding compliance coverage; and proving sustained value. The most successful will build across all layers of the digital stack — cloud, data, security, AI and experience — with transparent metrics that demonstrate real-world impact.

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Executive Summary

The future of healthcare will be shaped by organizations that blend intelligence with empathy, technology with trust, and automation with accountability. As the industry moves toward a more connected, equitable and resilient digital ecosystem, the ability to deliver governed, interoperable and outcome-driven transformation will define the winners of the next decade.

GenAI and agentic AI are shifting from pilot efforts to embedded enterprise capabilities. Intelligent automation, predictive decision support and conversational interfaces are transforming workflows, driving a shift from efficiency gains to true operational reinvention across administrative and clinical domains.

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Provider Positioning

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	Payer Digital Transformation	Provider Digital Transformation	Value-based Care	Interoperability and Data Security
Accenture	Leader	Leader	Leader	Leader
Atos	Market Challenger	Market Challenger	Market Challenger	Product Challenger
Capgemini	Market Challenger	Market Challenger	Market Challenger	Product Challenger
CitiusTech	Product Challenger	Product Challenger	Product Challenger	Not In
Coforge	Product Challenger	Not In	Market Challenger	Not In
Cognizant	Leader	Leader	Leader	Leader
Deloitte	Leader	Leader	Leader	Leader
DXC Technology	Product Challenger	Not In	Not In	Product Challenger
Emids	Product Challenger	Product Challenger	Product Challenger	Rising Star ★
EXL	Leader	Not In	Product Challenger	Not In

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Provider Positioning

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	Payer Digital Transformation	Provider Digital Transformation	Value-based Care	Interoperability and Data Security
Firstsource	Leader	Product Challenger	Product Challenger	Not In
Genpact	Product Challenger	Product Challenger	Product Challenger	Market Challenger
HCLTech	Leader	Leader	Leader	Leader
Hexaware	Product Challenger	Product Challenger	Not In	Not In
Hitachi Digital Services	Not In	Market Challenger	Not In	Not In
HTC Global Services	Market Challenger	Market Challenger	Not In	Contender
Infinite Computer Solutions	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Infosys	Leader	Market Challenger	Leader	Leader
Innova Solutions	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Kyndryl	Not In	Market Challenger	Not In	Not In

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Provider Positioning

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	Payer Digital Transformation	Provider Digital Transformation	Value-based Care	Interoperability and Data Security
LTIMindtree	Product Challenger	Product Challenger	Rising Star ★	Product Challenger
Mastek	Contender	Product Challenger	Not In	Not In
Mphasis	Product Challenger	Not In	Not In	Product Challenger
NTT DATA	Leader	Leader	Market Challenger	Leader
Persistent Systems	Rising Star ★	Rising Star ★	Rising Star ★	Product Challenger
Rackspace Technology	Contender	Product Challenger	Not In	Contender
Softtek	Contender	Contender	Contender	Contender
Sutherland	Product Challenger	Product Challenger	Not In	Not In
Tata Elxsi	Not In	Contender	Not In	Not In
TCS	Leader	Leader	Leader	Leader

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Provider Positioning

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	Payer Digital Transformation	Provider Digital Transformation	Value-based Care	Interoperability and Data Security
Tech Mahindra	Product Challenger	Leader	Market Challenger	Product Challenger
UST	Leader	Market Challenger	Not In	Not In
Virtusa	Product Challenger	Contender	Product Challenger	Product Challenger
Wipro	Leader	Leader	Leader	Leader
XBP Global	Contender	Contender	Not In	Not In

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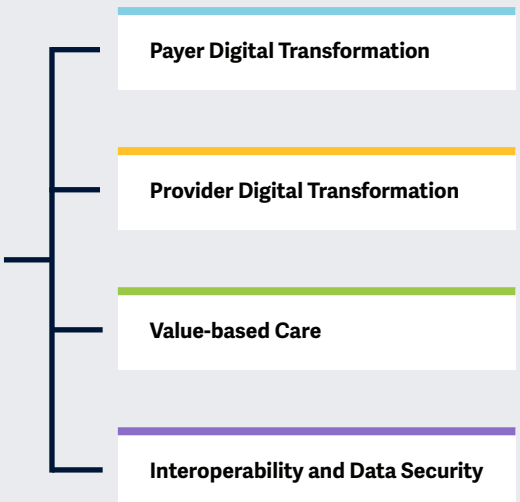
The IPL Healthcare Digital Services 2025 study **focuses on digital transformation services and solutions** designed for both healthcare payers and providers.



Simplified Illustration Source: ISG 2025

Definition

Digital transformation in healthcare refers to the strategic use of technologies, including EHRs, telemedicine, AI, wearables and data analytics, to drive operational efficiency and optimize patient care, each offering unique advantages. In 2025, AI continues to be central to advanced diagnostics, workflow automation and highly personalized treatment, while also supporting predictive analytics and population health management.

Telemedicine has expanded through secure and immersive AR/VR tools, making expert care accessible regardless of location. mHealth and IoT-powered wearables enable patients to monitor health in real time, encouraging proactive self-care. RPA streamlines administrative processes, reducing staff workload and errors. Advanced blockchain and encryption technologies protect health data and enable fast, secure sharing across institutions.

Next-gen patient engagement platforms leverage AI to offer tailored interventions, virtual health coaching and continuous remote monitoring, all within robust cloud architectures that adapt to evolving data security and privacy regulations. While progress has been made, challenges persist, particularly regarding interoperability among varied digital systems, rising cyberthreats (including AI-driven attacks) and access disparities for rural or underserved populations. Nonetheless, digital transformation is enhancing the efficiency, accessibility and patient-centeredness of healthcare in 2025. Ongoing regulatory changes and rapid technological advances promise to sustain this momentum.

The IPL Healthcare Digital Services 2025 study will evaluate providers' capabilities to upgrade client technologies, build agile frameworks and future-proof digital operations, with a focus on innovation readiness and resilience.

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Scope of the Report

In this ISG Provider Lens® quadrant study, ISG includes the following four quadrants: Payer Digital Transformation, Provider Digital Transformation, Value-based Care and Interoperability and Data Security

This ISG Provider Lens® study offers IT-decision makers:

- Transparency on the strengths and weaknesses of relevant service providers
- A differentiated positioning of providers by segments
- Focus on U.S. market

This ISG Provider Lens® study offers IT-decision makers: Our study serves as the basis for important decision-making in terms of positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing provider.

Provider Classifications

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the 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 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 $20 million and $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 $1 billion, with activities worldwide and globally distributed decision-making structures.

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. 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).

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Provider Classifications: Quadrant Key

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.

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.

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 products/ services and a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

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.

★ **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 means 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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Payer Digital Transformation

Who Should Read This Section

This report is valuable for service providers offering **payer digital transformation services** in **the U.S.** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

Digital professionals

Should read this report to understand how digital transformation is reshaping U.S. payer operations. It outlines how leading providers enhance workflow efficiency, strengthen business processes and apply automation, analytics and AI to improve service quality. These insights help stakeholders evaluate partners capable of modernizing payer ecosystems.

Technology professionals

Should read this report to explore how service providers use modern architectures, cloud solutions, automation tools and data-driven platforms to support payer needs. It compares capabilities across providers, helping organizations identify partners that can enable scalable modernization, seamless integration and long-term digital transformation.

Industry practitioners

Should read this report to understand how providers differ in capabilities, service depth and market maturity. The insights support better decision-making as organizations assess potential partners, plan transformation initiatives and align digital services with operational goals across an evolving U.S. payer landscape.

Cybersecurity professionals

Should read this report to explore how providers address regulatory compliance, protect sensitive healthcare data and implement strong security frameworks. The analysis highlights the approach for safeguarding patient and claims information while maintaining operational continuity and supporting digital transformation across payer environments.

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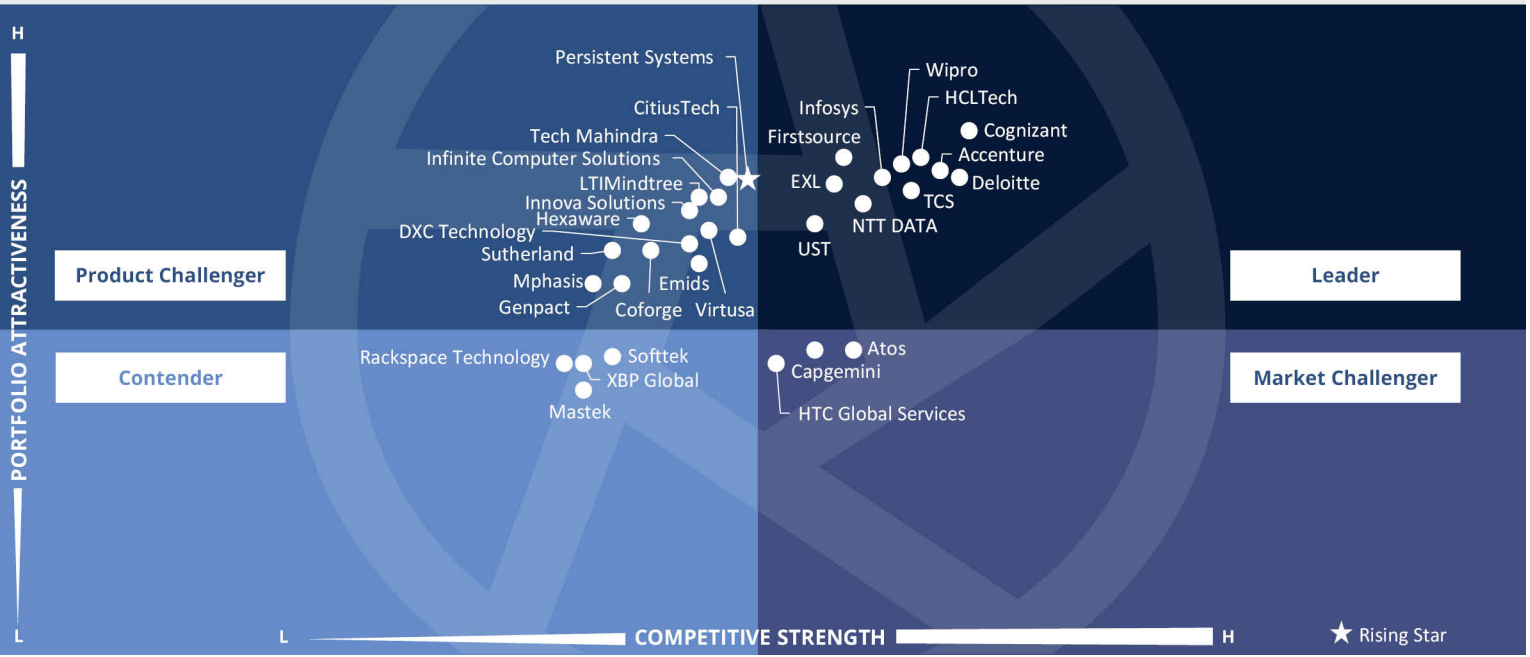
ISG Provider Lens®

Source: ISG RESEARCH

Healthcare Digital Services
Payer Digital Transformation

U.S. 2025



The quadrant assesses how leading service providers **transform healthcare payer operations** through **AI, automation and cloud,** delivering **scalable, compliant and member-centric ecosystems** that drive **measurable outcomes.**

Rohan Sinha

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Definition

In this quadrant, ISG assesses providers offering digital transformation services to healthcare payers, such as insurers, coverage firms and managed care organizations. Digital transformation involves adopting advanced technologies to optimize operations, boost member experience, cut costs and drive innovation. Key services include automating claims, eligibility, authorizations and using AI for risk prediction, fraud detection and personalized engagement. The focus is on secure data sharing and interoperability for transparency and efficient coordination. Benefits include streamlined operations, faster claims, improved satisfaction, regulatory compliance and agility to meet market needs. By modernizing and using member-focused digital tools, payers can reduce overhead, manage risks and improve care outcomes, supporting a more efficient and responsive healthcare system.

Eligibility Criteria

1. Demonstrate a comprehensive understanding of **payer operations, healthcare regulations** (such as **HIPAA** in the U.S. and **ANS** in Brazil) and all compliance requirements specific to **insurers** and **healthcare plans**
2. Leverage advanced technologies, including automation, **AI, analytics, cloud solutions, data interoperability and cybersecurity,** to **modernize legacy systems** and support innovation in **claims processing, risk management and member engagement**
3. Enable seamless **interoperability** and **integration** with existing systems, third-party tools and broader healthcare ecosystems, ensuring efficient **data exchange** and future **scalability**
4. Implement robust protocols for **security, data privacy and risk management** to safeguard sensitive health and member data, supported by well-defined incident response and compliance procedures
5. Clearly articulate **cost structure,** define measurable **KPIs** and maintain a strong focus on **ROI** to ensure tangible business outcomes

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Observations

The healthcare payer digital transformation landscape is undergoing rapid, technology-led evolution, marked by the convergence of AI, automation, data interoperability and cloud-native architectures. Across leading players, a clear shift is visible from process optimization to intelligent, end-to-end transformation that prioritizes member experience, operational efficiency and compliance. The industry is witnessing the mainstream adoption of GenAI and agentic AI — not merely as automation tools but as core enablers for personalization, decision intelligence and adaptive workflows. Providers are increasingly embedding responsible AI frameworks and governance mechanisms to ensure transparency, fairness and data privacy, aligning innovation with evolving CMS and HIPAA standards.

Another defining trend is the growing focus on value-based care and interoperability, where payer ecosystems integrate seamlessly with providers, pharmacy benefit managers (PBMs) and regulators using FHIR-compliant data exchange. Cloud-first platforms and BPaaS delivery models are enabling scalability, agility and cost reduction, while data-driven insights power predictive analytics for care management, risk adjustment and quality improvement. Strategic partnerships with hyperscalers such as AWS, Microsoft Azure and Google Cloud and co-innovation labs are accelerating deployment cycles and measurable ROI.

From the 45 companies assessed for this study, 32 qualified for this quadrant, with 11 being Leaders and one a Rising Star.

accenture

Accenture is a leader in payer digital transformation, enabling AI and automation with Solutions.AI for Health and SynOps for Health. Its AI, cloud and data platforms ensure interoperability and scalability, while Health GenAI Studios enable co-creation, driving efficiency and up to $454 million in savings.

cognizant

Cognizant's TriZetto® AI Gateway automates claims and care workflows with secure AI and real-time FHIR data exchange, while its value-based care stack enhances care coordination, network management and member engagement.

Deloitte.

Deloitte drives payer transformation through automation, AI and analytics. Platforms like Pallium and CareClarity™ streamline claims and authorizations, while its digital value framework and cloud partnerships enhance efficiency, compliance and member experiences.

EXL

EXL drives payer performance through data-led strategies, domain-trained AI and automation. Platforms like EXELIA.AI™, Smart Audit and XTRAKTO.AI™ enhance accuracy, compliance and engagement, while data modernization ensures secure, scalable and efficient operations.

firstsource

Firstsource transforms payer operations with AI-driven back-office solutions, Core Admin BPaaS and agentic AI for claims automation. Its data-led frameworks and predictive analytics enhance compliance, efficiency and healthcare outcomes, while reducing operational costs.

HCLTech

HCLTech empowers payers with GenAI platforms like AI Force and AI Foundry, driving automation, scalability and compliance. Its Digital Payer Enterprise and responsible AI frameworks deliver secure, agile and ethical transformation across the payer value chain.

Infosys

Infosys drives payer transformation with its digital-, cloud- and AI-first strategy. Platforms such as Helix, Cobalt and Topaz enable automation, interoperability and responsible AI adoption, enhancing scalability, compliance and member experiences.

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NTT DATA transforms payer operations through its Digital Health Platform, AI-driven insights and cloud-based BPaaS solutions, enhancing automation, payment integrity and member engagement, while ensuring scalability, compliance and operational excellence.

TCS advances payer transformation through AI-driven automation, cloud-native platforms and its Machine First™ approach, enhancing claims accuracy, interoperability and member experiences, while driving efficiency and measurable business outcomes.

UST modernizes payer operations through AI-driven automation, intelligent authorization and personalized member engagement. By combining data intelligence, cloud innovation and design thinking, UST enables efficient, connected and member-focused healthcare transformation.

Wipro transforms payer operations with its AI-powered PayerAI suite, automating claims, billing and engagement. Using GenAI and interoperability platforms, it enhances accuracy, compliance and value-based care, while driving transparency and trusted outcomes.

Persistent Systems (Rising Star) modernizes payer operations with GenAI, automation and data intelligence. Platforms such as HealthIntel, iAURA and SASVA™ enhance interoperability, efficiency and member experiences, enabling secure, personalized and compliant healthcare transformation.

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Leader

"Deloitte transforms payer operations with intelligent automation, real-time authorization and scalable analytics, driving accuracy, efficiency and measurable ROI."

Rohan Sinha

Deloitte

Overview

Deloitte is headquartered in London, U.K. It has more than 460,000 employees across over 150 countries. In FY24, the company generated $67.2 billion in revenue, with Consulting as its largest segment. Deloitte's platform-centric approach is supported by deep domain expertise, talent in both offshore and onshore locations, and strategic collaborations with hyperscalers to accelerate innovation and transformation for U.S. health plans. The company's emphasis on integrating digital strategy with organizational change and technology investments maximizes value creation, operational efficiency and compliance across complex payer environments.

Strengths

End-to-end automation across the payer value chain: Deloitte delivers comprehensive automation for payer operations, spanning claims, eligibility and prior authorization, through proprietary platforms such as Pallium and CareClarity™. These platforms integrate smart automation, advanced analytics and denial management to streamline workflows, minimize errors and improve payment accuracy across the claims lifecycle.

Intelligent prior authorization and real-time eligibility: CareClarity™, powered by Converge™ by Deloitte, automates prior authorization with EHR-agnostic, real-time determinations and integrated case intake. Its rules-based engine ensures payer-specific compliance, reducing 81 percent of denials linked to authorization issues. Automated eligibility checks and documentation validation enhance efficiency and lower administrative costs.

Scalable digital and analytics framework: Deloitte's Digital Transformation Value Database and extensible digital architecture quantify and accelerate ROI across more than 50 operational levers. Supported by hyperscaler partnerships and substantial healthcare expertise, Deloitte combines cloud, AI and omnichannel analytics to modernize payer systems, enhance member experiences and drive measurable business outcomes.

Caution

Deloitte should ensure consistent integration and scaling of emerging AI and analytics capabilities across its payer solutions to maintain innovation momentum and fully realize the value of digital transformation.

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Provider Digital Transformation

Who Should Read This Section

This report is valuable for service providers offering healthcare **provider digital transformation services** in **the U.S.** to understand their market position and for enterprises looking to evaluate these service providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

Digital professionals

Should read this report to understand how providers compare in digital solution maturity, integration capabilities and technical depth. The insights support planning and service provider selection as organizations work to improve clinical workflows, enhance operational efficiency and deliver stronger patient engagement through digital transformation.

Technology professionals

Should read this report to explore how providers leverage scalable architecture, automation, interoperability and cloud platforms to support healthcare modernization. It offers a clear comparison of technical strengths, helping organizations choose partners that align with digital roadmaps and improve performance across provider ecosystems.

Industry practitioners

Should read this report to gain clarity on provider positioning, solution breadth and digital capabilities. It helps organizations evaluate potential partners and select services that align with modernization goals, support operational excellence and strengthen patient outcomes within the U.S. healthcare provider landscape.

Cybersecurity professionals

Should read this report to understand how providers embed compliance, secure clinical data and mitigate cyber risks within digital ecosystems. The report outlines key controls, privacy safeguards and strategies used to support secure transformation while protecting patient trust and sustaining system reliability across healthcare settings.

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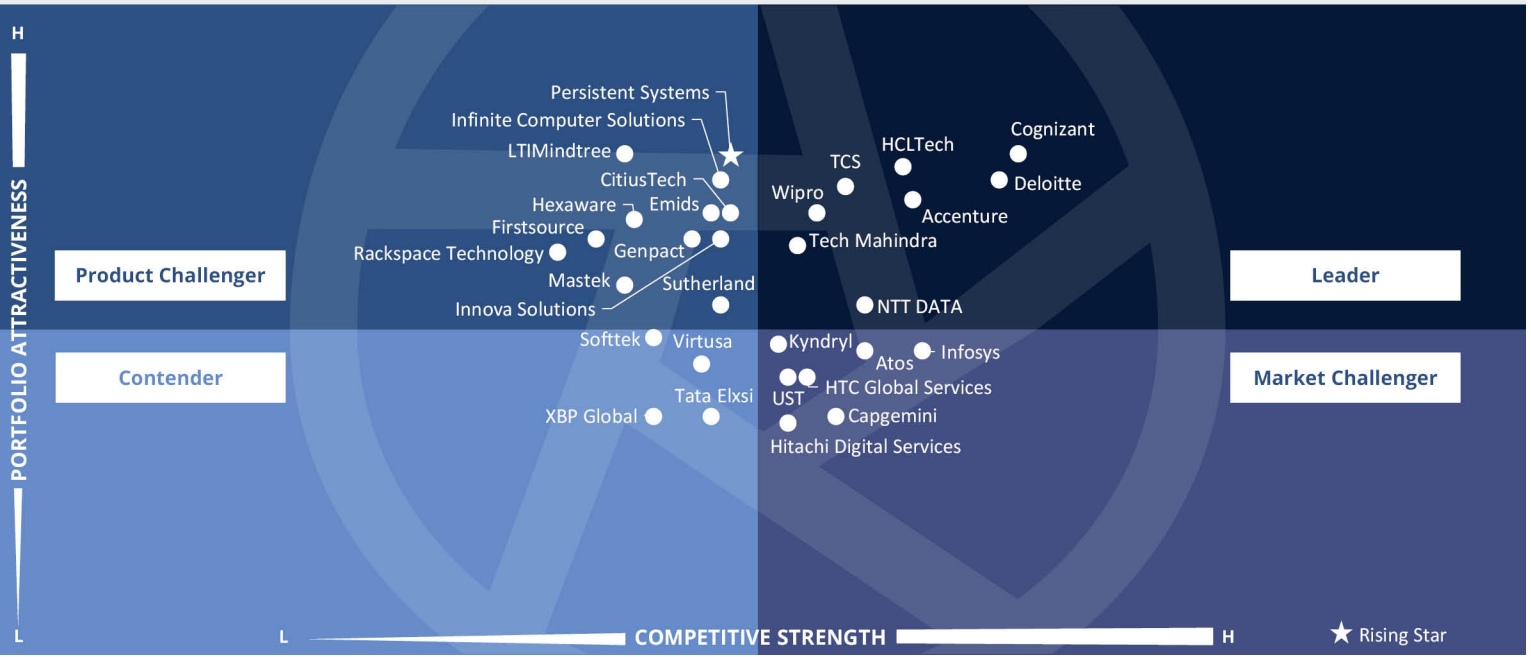
ISG Provider Lens®

Source: ISG RESEARCH

Healthcare Digital Services Provider Digital Transformation

U.S. 2025



This quadrant assesses **providers** delivering **end-to-end digital transformation solutions** that enable clients to **enhance patient outcomes.** Providers are evaluated on their **portfolio depth, innovation** and **global delivery capabilities.**

Sneha Jayanth

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Definition

In this quadrant, ISG evaluates providers delivering digital transformation services to healthcare organizations, including hospitals, clinics and integrated care networks. Provider digital transformation involves adopting advanced technologies to enhance clinical care, operational efficiency and patient engagement. Key offerings include integrating EHRs, telemedicine, AI-powered diagnostics, cloud platforms, IoT-enabled devices and analytics to enable evidence-based care and streamlined processes.

The focus is on building interoperable systems for secure data sharing, real-time monitoring and coordinated care. Benefits include more accurate diagnoses, personalized treatments, reduced administrative burden, better patient safety, and expanded remote and preventive care. Digital workflows also support compliance and data privacy. By modernizing clinical and operational processes, providers achieve more connected, efficient and patient-centered care while keeping pace with industry and regulatory changes.

Eligibility Criteria

1. Demonstrate a comprehensive understanding of clinical workflows, care delivery processes and healthcare regulations (such as **HIPAA** in the U.S., **ANS** in Brazil and local data protection laws) relevant to hospitals, clinics and integrated care networks
2. Integrate advanced digital technologies, including **EHRs, telemedicine platforms, AI-driven diagnostics, IoT-enabled medical devices, cloud solutions and data analytics,** to modernize clinical and operational systems for evidence-based, data-driven care
3. Ensure robust **security, data privacy and risk management** frameworks to protect sensitive patient and organizational data, with clear incident response and **compliance** strategies
4. Enable seamless **interoperability** and **integration** between electronic health systems, medical devices, third-party applications and broader **health information exchanges** to support coordinated, real-time care
5. Employ agile, iterative approaches to **project management** and **solution delivery,** ensuring rapid adaptation to changes in clinical needs, **regulations** and **emerging technologies**

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Observations

This quadrant provides a comprehensive view of the evolving digital transformation landscape of healthcare service providers, highlighting their capabilities to enable data-driven, connected and compliant ecosystems for U.S. clients. The year saw a continued consolidation of digital and domain expertise, with several providers expanding their portfolios through strategic mergers, acquisitions and partnerships aimed at enhancing platform-led delivery, AI-driven analytics and regulatory intelligence solutions. Compared with the previous year, provider positioning has become more differentiated, reflecting clear investments in cloud modernization, digital engineering and patient-centric platforms.

A noticeable shift is the rise of specialized providers emphasizing interoperability, data standardization and compliance automation, aligning with the industry's shift toward smarter, outcome-based collaboration models. Large players continue to leverage scale and long-standing client relationships, while niche firms are gaining ground through agility and vertical depth. Overall, the quadrant underscores an accelerated convergence of IT, clinical and regulatory domains, as healthcare enterprises prioritize digitally enabled transformation to achieve speed, compliance and patient value in equal measure.

From the 45 companies assessed for this study, 31 qualified for this quadrant, with eight being Leaders and one a Rising Star.

accenture

Accenture continues to be a leader in provider digital transformation with deep healthcare expertise, scalable IP and a strong innovation ecosystem, driving intelligent, outcome-driven care models.

cognizant

Cognizant drives payer-provider convergence, interoperability and automation at enterprise scale, powered by its Neuro® AI and TriZetto® AI Gateway.

Deloitte.

Deloitte combines strategic consulting with technology enablement, supporting its capabilities in enabling EHR modernization, interoperability and data-driven decision frameworks for providers.

HCLTech

HCLTech delivers robust interoperability and AIOps capabilities, transforming healthcare provider environments for agility, resilience and data intelligence.

NTT DATA

NTT DATA offers AI-enabled platforms, cloud-first modernization and interoperability, focusing on precision care, automation and connected ecosystems, to ensure measurable clinical and operational outcomes.

TECH mahindra

Tech Mahindra offers modular, API-based frameworks, enabling connected care and value-based delivery; it balances innovation with large-scale execution.

TCS TATA CONSULTANCY SERVICES

TCS combines legacy modernization with FHIR-based interoperability and AI-driven insights, ensuring consistency and scalability across healthcare provider systems.

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Wipro balances operational excellence with innovation, offering comprehensive EHR modernization, hybrid cloud enablement and predictive analytics.

Persistent

Persistent Systems (Rising Star) combines AI-driven automation, interoperability and platform engineering to enhance healthcare provider productivity and clinical effectiveness.

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Leader

"Deloitte is an advisory-led healthcare innovator that advances provider transformation through human-centered design and streamlined clinical and administrative workflows."

Sneha Jayanth

Deloitte

Overview

Deloitte is headquartered in London, U.K. It has more than 460,000 employees across over 150 countries. In FY24, the company generated $67.2 billion in revenue, with Consulting as its largest segment. It is recognized as a leader in combining advisory strength and digital core modernization to enable agile, interoperable provider ecosystems. Deloitte has strong traction in the U.S. market with its integrated delivery networks focused on end-to-end workflow redesign and AI-supported care optimization across clinical and administrative areas.

Strengths

Human-centered transformation framework: Deloitte leads provider digital transformation with a human-centered, advisory-led approach that integrates EHR modernization, digital core advancement and workflow redesign. Deloitte applies its proprietary frameworks including MyPath, DigitalCore, and CareConnect to guide enterprises through complex transitions toward interoperable, patient-centered systems.

Strategic digital core advancement: Deloitte's digital core methodology modernizes legacy infrastructures into agile, analytics-enabled systems. It aligns business value with measurable outcomes, driving operational efficiency, regulatory compliance and data liquidity across the care continuum.

Integrated EHR and telehealth enablement: With deep EHR expertise across IoMT and telemedicine, Deloitte enables real-time monitoring, secure cloud connectivity and AI-powered virtual care delivery. Its design principles embed interoperability, scalability and clinician usability, ensuring sustainable modernization.

Advisory depth and market leadership: By combining consulting depth with implementation expertise, Deloitte's Advise-Implement-Operate model enables full-spectrum transformation. The company's focus on workflow redesign and predictive analytics reinforces its portfolio attractiveness and competitive leadership in provider digital transformation.

Caution

Deloitte's human-centered advisory strength and strategic transformation expertise firmly position it as a market leader. Scaling its technology-led delivery and platform-driven execution capabilities would further enhance its agility and sustain its digital leadership.

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Value-based Care

Who Should Read This Section

This report is valuable for service providers offering **value- based care** in **the U.S.** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

Digital professionals

Should read this report to understand how providers use digital innovation, analytics and integrated platforms to support value-based care models. It highlights how technology drives care coordination, improves outcomes and enhances operational efficiency, helping organizations select partners that strengthen value-focused transformation.

Technology professionals

Should read this report to see how transformation partners enable value-based care through interoperability, population health tools, automation and secure data exchange. It compares providers to help organizations identify those most aligned with redesigned workflows, coordinated care and performance-based reimbursement models.

Industry practitioners

Should read this report to understand how service providers support value-based care through advanced analytics, digital capabilities and patient-centered technologies. The insights help organizations assess providers strengths, evaluate solution maturity and select partners that can drive better outcomes within a rapidly evolving healthcare ecosystem.

Cybersecurity professionals

Should read this report to learn how providers secure data sharing, maintain compliance and protect patient information within value-based care models. It highlights privacy safeguards and risk-mitigation strategies that help organizations choose partners capable of supporting collaboration while ensuring strong security across the ecosystem.

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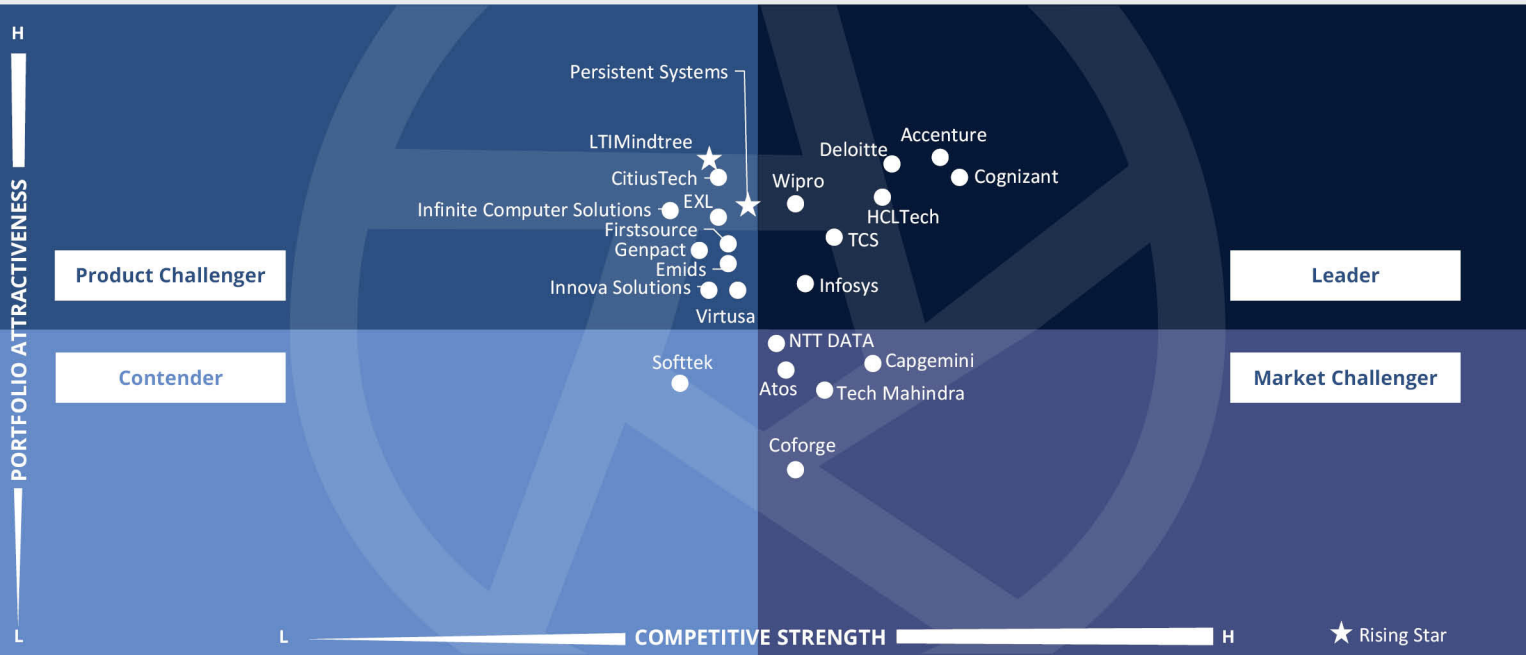
ISG Provider Lens®

Source: ISG RESEARCH

Healthcare Digital Services
Value-based Care

U.S. 2025



This quadrant evaluates providers that help healthcare organizations **transition to value-based care models** through **data-driven insights, interoperable platforms** and **patient-centered engagement**. These providers focus on improving **care coordination, outcome measurement** and **cost efficiency**.

Sneha Jayanth

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Definition

In this quadrant, ISG evaluates providers delivering digital services that support value-based care in healthcare organizations, such as hospitals, physician groups and accountable care organizations. These services leverage advanced technologies and data-driven platforms to shift from fee-for-service to care models focusing on patient outcomes and cost efficiency. They integrate EHRs, real-time analytics, patient engagement platforms and care coordination tools for continuous outcome measurement and tailored interventions.

Core features include interoperability for data sharing, predictive modeling for proactive population health management, and digital tools for patient engagement. Benefits include improved care quality, fewer readmissions, higher patient satisfaction and optimized resources. Digital transformation helps align incentives, achieve compliance and ensure long-term sustainability, enabling more patient-centric care in a digital age.

Eligibility Criteria

1. Demonstrate a thorough understanding of **value-based care** concepts, care coordination, clinical quality measures and regulatory requirements (such as **MACRA, MIPS** and **ACOs**) relevant to healthcare organizations
2. Integrate **advanced digital technologies,** including **actionable analytics, patient engagement platforms, interoperable EHRs, care management systems and population health tools,** to enable continuous outcome tracking and targeted interventions
3. Adapt solutions for diverse **patient populations and care settings,** utilizing scalable and customizable tools for **workflow automation, risk stratification and chronic disease management**
4. Enable seamless data **interoperability** and **integration** among **EHRs, claims systems, payer platforms** and third-party tools to support holistic patient views and comprehensive care coordination
5. Implement **robust security, privacy and data governance** measures to safeguard sensitive patient and provider data, ensuring **compliance** with **HIPAA** and other relevant privacy regulations
6. Prioritize **tools** and **processes** that actively engage patients in their wellness journeys, such as **personalized portals, remote monitoring and real-time health coaching**

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Observations

This quadrant offers a strategic overview of the maturing value-based care ecosystem, mapping providers that support healthcare organizations in shifting from volume-driven to outcome-driven care models. Over the past year, the quadrant reflects strong momentum in digital health enablement, with providers refining their capabilities in interoperable data platforms, AI-enabled care management and real-world evidence analytics. There has been notable repositioning among several firms, driven by investments in population health analytics, patient engagement platforms and reimbursement optimization frameworks.

Mergers and acquisitions during the year emphasized data integration, payer-provider collaboration and clinical decision support, signaling a broad-based push toward integrated digital ecosystems. The market continues to evolve from pilot programs toward scalable, measurable impact, with emerging providers carving out specialized niches around chronic disease management, remote monitoring and virtual-first care models.

The quadrant highlights that success in the value-based care space increasingly depends on ecosystem partnerships, the ability to translate insights into measurable outcomes and the integration of digital tools that drive cost efficiency
and care equity.

From the 35 companies assessed for this study, 23 qualified for this quadrant, with seven being Leaders and two Rising Stars.

accenture

Accenture leads in outcomes measurement and AI-enabled health analytics. Its Accenture Health Analytics platform, FHIR-first architecture and human-centric frameworks position it as a benchmark for value-based care maturity and large-scale transformation.

cognizant

Cognizant's AI-driven TriZetto® ecosystem enables connected value-based care operations, including contract management, risk adjustment and quality measurement, positioning it among the most mature value-based care enablers.

Deloitte.

Deloitte delivers quantifiable value-based care impact via integrated analytics, real-time performance monitoring and workflow redesign. Its advisory-to-operations model ensures sustainable care transformation and regulatory alignment.

HCLTech

HCLTech combines engineering expertise with healthcare-specific analytics and automation. Its population health framework and AIOps-driven platforms deliver measurable value-based care efficiency and care coordination outcomes.

Infosys

Infosys demonstrates strong maturity in value-based care enablement through its Medical Management Practice and FHIR-driven interoperability. Its strong analytics, automation and responsible AI governance create measurable impact across quality reporting and care coordination.

TCS TATA CONSULTANCY SERVICES

TCS has substantial expertise in analytics-led modernization, connecting data across payer-provider networks to measure performance and predict outcomes. Its AI and interoperability IP assets ensure compliance and precision care.

wipro

Wipro's end-to-end value-based care architecture merges analytics, automation and care coordination, enabling cost-efficient, patient-centered outcomes across providers and payers.

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LTIMindtree

LTIMindtree (Rising Star), in partnership with COPE Health Solutions, accelerates value-based care adoption through strategic-to-operational support, risk analytics and value-based care platforms. The collaboration drives optimized networks, reduced costs and better population health.

Persistent

Persistent Systems (Rising Star) merges interoperability, AI and precision analytics to help providers and payers operationalize value-based care contracts with measurable, data-backed outcomes.

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Leader

"Deloitte is an advisory-led innovator enabling measurable value-based outcomes through analytics, quality measurement and strategic frameworks."

Sneha Jayanth

Deloitte

Overview

Deloitte is headquartered in London, U.K. It has more than 460,000 employees across over 150 countries. In FY24, the company generated $67.2 billion in revenue, with Consulting as its largest segment. Deloitte is a recognized leader in value-based care transformation, leveraging data-driven frameworks that integrate predictive analytics, performance dashboards, and population health modeling to strengthen quality measurement and reporting. These capabilities help providers track care quality, cost efficiency, and patient satisfaction in real time, aligning operations with value-based performance goals. Deloitte maintains a strong U.S. presence across Medicaid modernization, integrated delivery networks, and quality performance programs.

Strengths

Integrated analytics framework: Deloitte applies a data-driven, evidence-based approach to value-based care, integrating predictive analytics, ML and population health modeling to enhance outcomes. Its evaluation frameworks monitor quality, cost and patient experience in real time, helping enterprises shift from volume to value. Interactive dashboards track KPIs and align clinical and operational performance with contractual goals.

Proven quality and performance: Deloitte's transformation programs deliver measurable improvements, including lower readmissions and better chronic and acute care outcomes. Its Quality and Performance Alignment Model links financial incentives to quality metrics such as HEDIS and Stars, while its teams design payer-provider contracts that reward prevention and efficiency.

Digital core modernization: By modernizing digital cores, Deloitte enables agile, interoperable systems that support real-time value-based care reporting. Its EHR accelerators unify patient data across care settings, ensuring accurate, compliant and actionable insights for clinical and payer needs.

Advisory-to-execution expertise: Deloitte's Advise-Implement-Operate model combines strategic alignment, clinical redesign and predictive analytics to embed value-based principles. Its combination of strategy, technology and operational depth positions it as a trusted partner globally.

Caution

Deloitte's analytics-driven transformation expertise and advisory capabilities are well established. Developing repeatable, modular value-based care accelerators tailored to midmarket and regional provider networks would enhance scalability and broaden market accessibility.

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Interoperability and Data Security

Who Should Read This Section

This report is valuable for service providers offering **interoperability and data security services** in **the U.S.** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

Digital professionals

Should read this report to understand how providers strengthen interoperability, streamline data sharing and support integrated healthcare environments. It compares technical maturity, integration expertise and scalability, helping organizations select partners that improve connectivity, data quality and operational performance across U.S. healthcare systems.

Technology professionals

Should read this report to explore how providers build interoperable architectures, modern data platforms and secure integration frameworks. It provides clarity on provider strengths, helping organizations align digital strategies with partners capable of delivering connected, compliant and scalable healthcare technology ecosystems.

Industry practitioners

Should read this report to understand how providers use digital tools to improve system interoperability, ensure smooth data flow and support informed decision-making. It helps organizations evaluate provider capabilities and select partners that can enhance operational and clinical outcomes across U.S. healthcare environments.

Cybersecurity professionals

Should read this report to examine how providers protect data exchange, meet regulatory requirements and mitigate risks across interconnected healthcare systems. The insights highlight security controls and privacy frameworks that help organizations choose partners that can support interoperability while protecting patient information.

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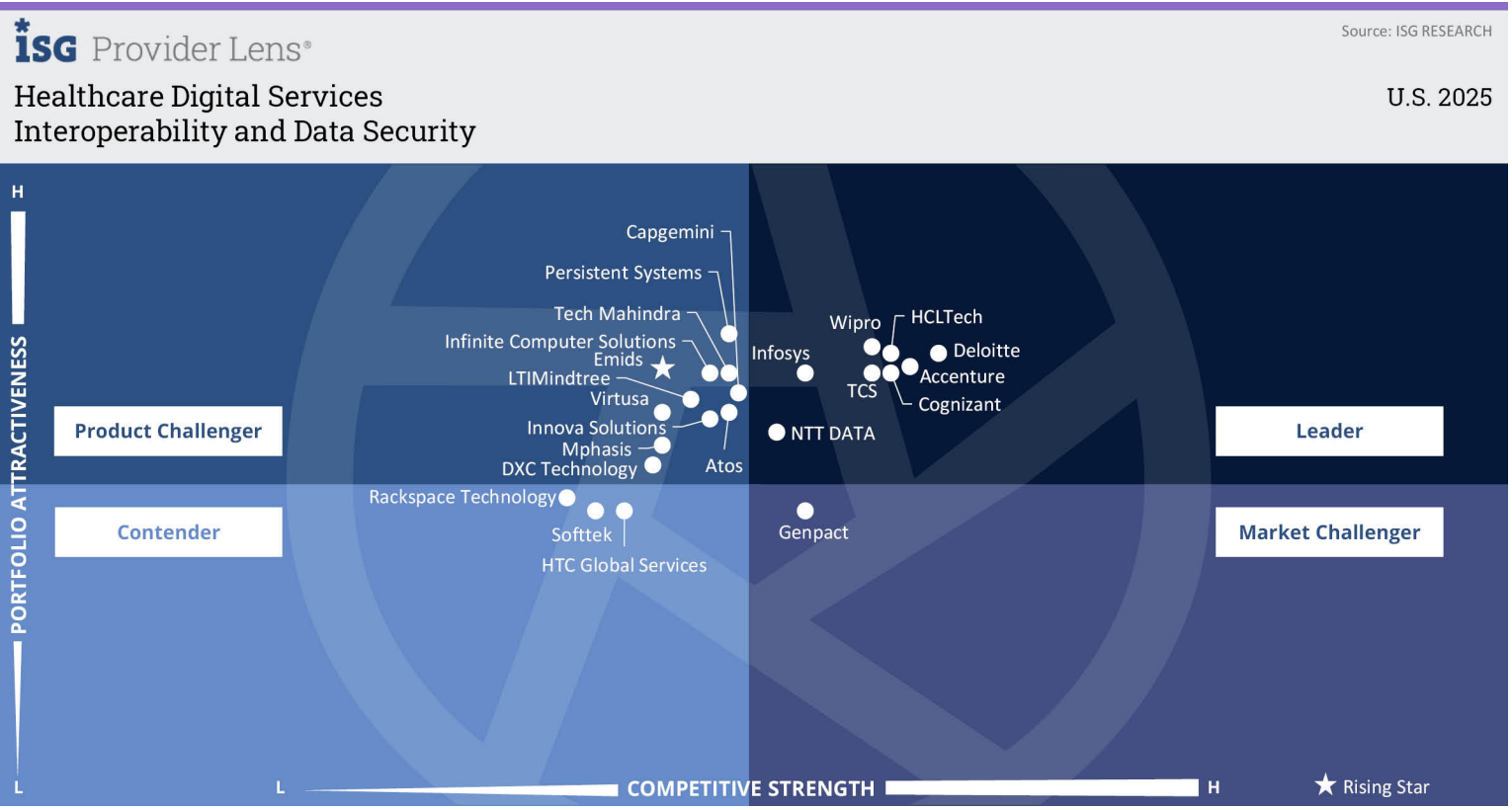

The quadrant evaluates how healthcare technology providers enhance **interoperability** and **data security** through **FHIR-based integration, AI-driven automation** and **privacy-first frameworks** to enable secure, connected and compliant care ecosystems.

Rohan Sinha

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Definition

In this quadrant, ISG evaluates IT service providers that enable interoperability and data security for healthcare organizations, including hospitals, clinics, payers and partners. Interoperability means the secure, seamless exchange and use of data across different systems, devices and organizations. Providers achieve this with open standards like HL7 and FHIR, standard data formats, and governance frameworks, ensuring patient data stays accurate, accessible and actionable.

Data security involves protecting sensitive health information with encryption, strict access controls, audit trails, and compliance with HIPAA, GDPR and ANS regulations. Providers offer solutions to ensure privacy during data transfer and storage, manage patient consent and quickly detect threats. Through strong interoperability and security, IT providers help healthcare organizations access real-time insights, coordinate care, maintain trust and meet compliance needs efficiently in a complex digital landscape.

Eligibility Criteria

1. Demonstrate knowledge of healthcare interoperability standards (such as **HL7, FHIR** and **DICOM** in the U.S.) and regulatory frameworks (such as **HIPAA** and **GDPR** and Brazil's **TISS, ICP Brazil** and **LGPD**), ensuring solutions comply with legal and industry requirements
2. Implement a technical architecture that enables **seamless, secure data exchange** across **platforms, devices** and organizational boundaries, supporting **legacy** and **modern** systems
3. Educate client stakeholders **on interoperability workflows, security protocols** and best practices to foster a culture of compliance and vigilance
4. Employ **advanced security practices,** including **encryption, MFA,** role-based access controls, **comprehensive audit trails** and continuous **threat monitoring,** to protect sensitive data at rest and in transit
5. Adapt and **scale solutions** to accommodate growing, evolving or geographically distributed healthcare environments, incorporating **emerging requirements**
6. Facilitate the **rapid detection,** response and remediation of security **vulnerabilities** by providing regular updates and transparent incident communication
7. Clearly define security policies, **SLAs,** compliance documentation and measurable **KPIs,** focusing on uptime, breach response times and regulatory audit readiness

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Observations

The healthcare interoperability and data security landscape is entering a pivotal phase of transformation, shaped by regulatory mandates, rapid digitalization and growing expectations for patient-centered care. Global compliance frameworks, such as the CMS Interoperability and Prior Authorization Rule, the ONC Cures Act, HIPAA and GDPR, are driving organizations to modernize their data exchange architectures while ensuring privacy and resilience. The focus is shifting from isolated, system-specific integration toward open, standards-based ecosystems built on FHIR, HL7 and DICOM, enabling real-time, secure data flow across providers, payers and patients.

Emerging technologies such as GenAI, agentic AI, homomorphic encryption and federated learning are redefining how data is harmonized, analyzed and protected. The integration of these technologies into healthcare operations is enabling intelligent automation, context-aware analytics and adaptive governance models that enhance efficiency while preserving patient trust.

Cloud-native interoperability platforms, supported by zero trust security frameworks and DevSecOps practices, are becoming foundational in unifying clinical, financial and operational data into cohesive digital ecosystems.

As the market matures, the emphasis is increasingly on balancing innovation with compliance, automation with oversight and accessibility with privacy. The convergence of interoperability and cybersecurity is paving the way for a connected, intelligent healthcare environment that is secure, scalable and designed around better outcomes for patients and healthcare stakeholders alike.

From the 35 companies assessed for this study, 23 qualified for this quadrant, with eight being Leaders and one a Rising Star.

accenture

Accenture enables secure, standards-based healthcare interoperability through cloud-native, API-first solutions. Its Connected Health Ecosystem enhances care coordination, accelerates deployment, improves performance and drives smarter, more efficient healthcare outcomes.

cognizant

Cognizant delivers secure, standards-based interoperability through its TriZetto® and Connected Interoperability Solution with embedded privacy and AI-driven automation, enhancing compliance, collaboration and personalized care across healthcare ecosystems.

Deloitte.

Deloitte advances secure, standards-based healthcare interoperability through HIPAA and GDPR compliance, robust data protection and AI-ready platforms. Its innovation hubs and alliances foster trusted, connected and compliant digital healthcare ecosystems.

HCLTech

HCLTech delivers secure, standards-based healthcare interoperability through HL7 and FHIR compliance, AI-driven data security and GenAI-enabled automation, enhancing compliance, efficiency and connected care across clinical, financial and operational ecosystems.

Infosys

Infosys has long-standing expertise in healthcare interoperability using HL7 and FHIR standards. Its AI and cloud-based solutions enable secure information exchange, system integration, and compliance with CMS and other healthcare regulations.

NTT DATA

NTT DATA delivers secure, AI-enabled healthcare interoperability through zero trust architecture, cloud-based data protection, and intelligent platforms that enhance collaboration, automate workflows and support personalized, efficient care delivery.

TCS TATA CONSULTANCY SERVICES

TCS delivers secure, standards-based healthcare interoperability using FHIR APIs and advanced encryption. Its AI-driven threat

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detection and privacy technologies enhance compliance, protect patient data, and ensure resilient, connected healthcare operations.

Wipro enables secure, standards-based healthcare interoperability through FHIR and HL7 compliance, cloud-native compliance frameworks, and AI-driven automation that enhance data accuracy, care coordination and privacy across connected healthcare ecosystems.

Emids

Emids (Rising Star) delivers secure and FHIR- and HL7-compliant interoperability with real-time APIs, unified clinical data and HIPAA-aligned security. Its cloud-based, automated regulatory and security framework ensures compliance, scalability and trusted healthcare data exchange across ecosystems.

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Leader

"Deloitte enables secure and connected healthcare by uniting interoperability, compliance and innovation to build trusted, patient-centered digital ecosystems."

Rohan Sinha

Deloitte

Overview

Deloitte is headquartered in London, U.K. It has more than 460,000 employees across over 150 countries. In FY24, the company generated $67.2 billion in revenue, with Consulting as its largest segment. Deloitte's healthcare interoperability and security capabilities in the U.S. center on enabling seamless, secure health data exchange to improve care coordination and patient outcomes. The company focuses on compliance with CMS and ONC interoperability rules, helping organizations implement API-driven data sharing, real-time notifications and price transparency solutions.

Strengths

Standards-based interoperability: Deloitte delivers secure, standards-driven interoperability across healthcare systems by promoting standardized data formats, terminologies, and protocols such as HL7 and FHIR. It ensures compliance with key regulations, including HIPAA and GDPR, enabling healthcare organizations to securely exchange clinical, claim and administrative information, while maintaining data integrity, privacy and cross-system compatibility.

Comprehensive data protection: Through its Data & Digital Trust and Managed Data Protection services, Deloitte provides end-to-end solutions covering encryption, access control, data loss prevention and anomaly detection. These services ensure that patient data is safeguarded across digital ecosystems, while maintaining auditability and trust. Strategic alliances with cybersecurity leaders, such as Thales, enhance multicloud security through advanced encryption and key management technologies.

Compliance framework modernization: Deloitte's innovation hubs drive interoperability, usability testing and equitable access to technology across federal and enterprise healthcare initiatives. Its Digital Quality & Compliance programs help firms modernize regulatory compliance frameworks, while fostering secure, interoperable platforms that integrate data from claims, clinical history, financial records and social determinants — enabling connected, compliant and resilient healthcare operations.

Caution

Deloitte should ensure continuous alignment between rapid digital innovation and evolving global privacy regulations. As interoperability expands across multicloud and AI-enabled systems, maintaining consistent governance and preventing compliance drift will be essential to safeguard patient trust.

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Appendix

The ISG Provider Lens® 2025 – Healthcare Digital Services study analyzes the relevant software vendors/service providers in the U.S. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

Study Sponsor:
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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 service providers and analysis of publicly available market information from multiple sources. The data collected for this report represent information that ISG believes to be current as of December, 2025 for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

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

The study was conducted in the following steps:

1. Definition of Healthcare Digital Services 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. Leverage ISG's internal databases and advisor knowledge & experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts & figures received from providers and other sources.
6. Use of the following key evaluation criteria:
   * Strategy and 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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Lead Author

Rohan Sinha

Senior Manager and Principal Analyst

Rohan Sinha is a seasoned professional with over a decade of experience as ananalyst in the healthcare and life sciences industries. He has been at the forefront inoffering strategic guidance to industry CIOs, leveraging a wealth of published research and extensive interactions with industry stalwarts.

His work has been instrumental in shaping the strategies and decisions oforganizations in these critical industries. Rohan also possesses a keen interest in theworld of AI and GenAI, where he continually explores the significant impact of thesecutting-edge technologies on the said industries.

Co-Author and Research Analyst

Sneha Jayanth

Lead Analyst

Sneha Jayanth is a Lead Analyst at ISG with over eight years of experience in ICT-related market intelligence and thought leadership. She plays a pivotal role in leading and co-authoring ISG Provider Lens® studies across Healthcare, Life Sciences, Medical Devices, and custom research engagements. Her work has contributed to shaping enterprise strategies by delivering actionable insights on market trends and technology adoption.

Sneha's background includes research on transformative technologies such as IoT, AI, cloud, and Analytics and developing thought leadership in the ICT sector. She also leads the creation of IPL reports that capture key trends and insights relevant to the broader provider landscape. Her research is recognized for its depth, clarity, and strategic value in guiding decision-makers in complex and evolving industries.

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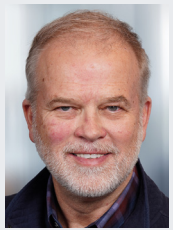
Study Sponsor

Iain Fisher
Director, Research

Iain Fisher is ISG's head of industry research and market trends. With over 20 years in consulting and strategic advisory, Iain now focuses on cross industry research with an eye on technology led digital innovation, creating new strategies, products, services, and experiences by analysing end-to-end operations and measuring efficiencies focused on redefining customer experiences. Fisher is published, known in the market and advises on how to achieve strategic advantage. A thought leader on Future of Work, Customer Experience, ESG, Aviation and cross industry solutioning. He provides major market insights leading to changes to business models and operating models to drive out new ways of working.

Fisher works with enterprise organizations and technology providers to champion the change in customer focused delivery of services and solutions in challenging situations. Fisher is also a regular Keynote speaker and online presenter, having authored several eBooks on these subjects.

IPL Product Owner



Jan Erik Aase
Partner and Global Head – ISG Provider Lens®

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 partner 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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ISG Provider Lens®

The ISG Provider Lens® Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners.
ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens® research, please visit this webpage.

ISG Research™

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ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: Public Sector.

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ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth.

The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

For more information, visit isg-one.com.

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ISG Provider Lens®

DECEMBER, 2025

REPORT: HEALTHCARE DIGITAL SERVICES

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