

Healthcare Provider Digital Services 2025 Market Insights™

Driving healthcare provider
success through digital health
solutions

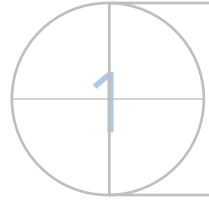
October 2025



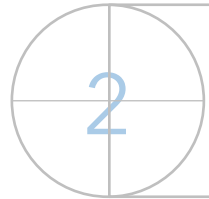
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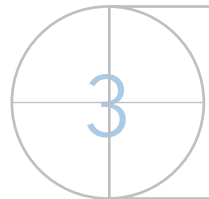
About Healthcare Provider Digital Services 2025 Market Insights



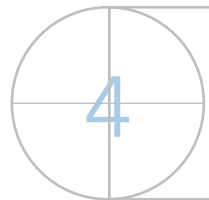
The *Healthcare Provider Digital Services 2025 Market Insights* report is a companion to the *Healthcare Provider Digital Services 2025 RadarView* report. While the RadarView focuses specifically on assessing service providers, this report takes a broader approach, providing a comprehensive overview of the current state of the healthcare provider market and Avasant's outlook for its future trajectory.



In recent years, the healthcare provider landscape has undergone significant changes. This report aims to inform key stakeholders such as enterprises, service providers, and healthcare leaders about the major trends influencing this dynamic environment. It examines the main factors driving growth, the evolving strategic priorities, and the overall transformation of the healthcare provider ecosystem.



This report is based on thorough data collection from our continuous market tracking, which includes market surveys and interactions with healthcare providers and service organizations. Our real-world experiences with healthcare provider projects have further enhanced the data and analysis.



The *Healthcare Provider Digital Services 2025 Market Insights* report provides stakeholders with a comprehensive understanding of the current landscape and future direction of the healthcare provider market, making it an essential tool for strategic planning and decision-making.



Executive summary

Definition and scope of healthcare provider digital services

The study's focus encompasses digital services provided to licensed businesses offering healthcare provider coverage, as well as stakeholders within the healthcare provider ecosystem:

Type of coverage	Description	Enterprise illustrative examples
Health systems/hospitals	A health system comprises at least one or more hospitals and a group of physicians offering comprehensive care, which includes primary, dental, and specialty services. These entities are standalone or interconnected through shared ownership or collaborative management structures.	
Primary/Community health centers/clinics	Primary/Community health centers are healthcare facilities that are the first point of contact for individuals seeking medical services. These centers offer a wide range of primary healthcare services, including preventive care, dental problems, treatment for common illnesses, chronic disease management, and referrals to specialists when needed. They can operate under public or private management and may consist of standalone clinics or a network of clinics.	
Home/Hospice care services	Home/Hospice care services refer to a range of healthcare and support services provided to individuals in their own homes. These services are often tailored to meet the specific needs of patients who may have difficulty leaving their homes due to illness, injury, disability, or age-related limitations.	

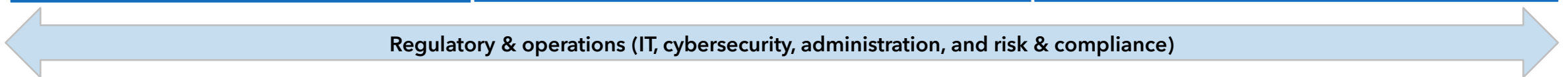
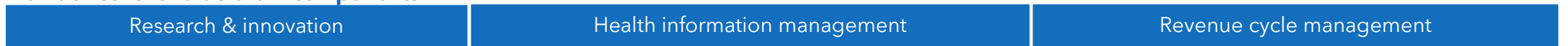
Digital services definition: Digital services accelerate the digital transformation using emerging technologies—AI and analytics, blockchain, cloud, cybersecurity, IA, and IoT across the healthcare provider value chain. The service providers’ offerings to be assessed in this study are advisory and consulting, proof of concept development, build and test, implementation, system integration, and development and maintenance.

We will assess service providers’ offerings across the value chain components given below:

Patient-centric value chain components



Provider-centric value chain components



Executive summary—healthcare provider

Key drivers



Amid rising denials and shrinking margins, streamlining workflows and modernizing systems are essential for efficiency and sustainable growth



The shift toward prevention and population health aims to identify risks early, manage chronic conditions proactively, and improve outcomes



It is imperative to empower patients to proactively manage their health, facilitate timely interventions, and ensure continuity of care beyond traditional healthcare settings



It is essential to enable seamless data sharing across systems to enhance care coordination, ensure regulatory compliance, and eliminate operational redundancies



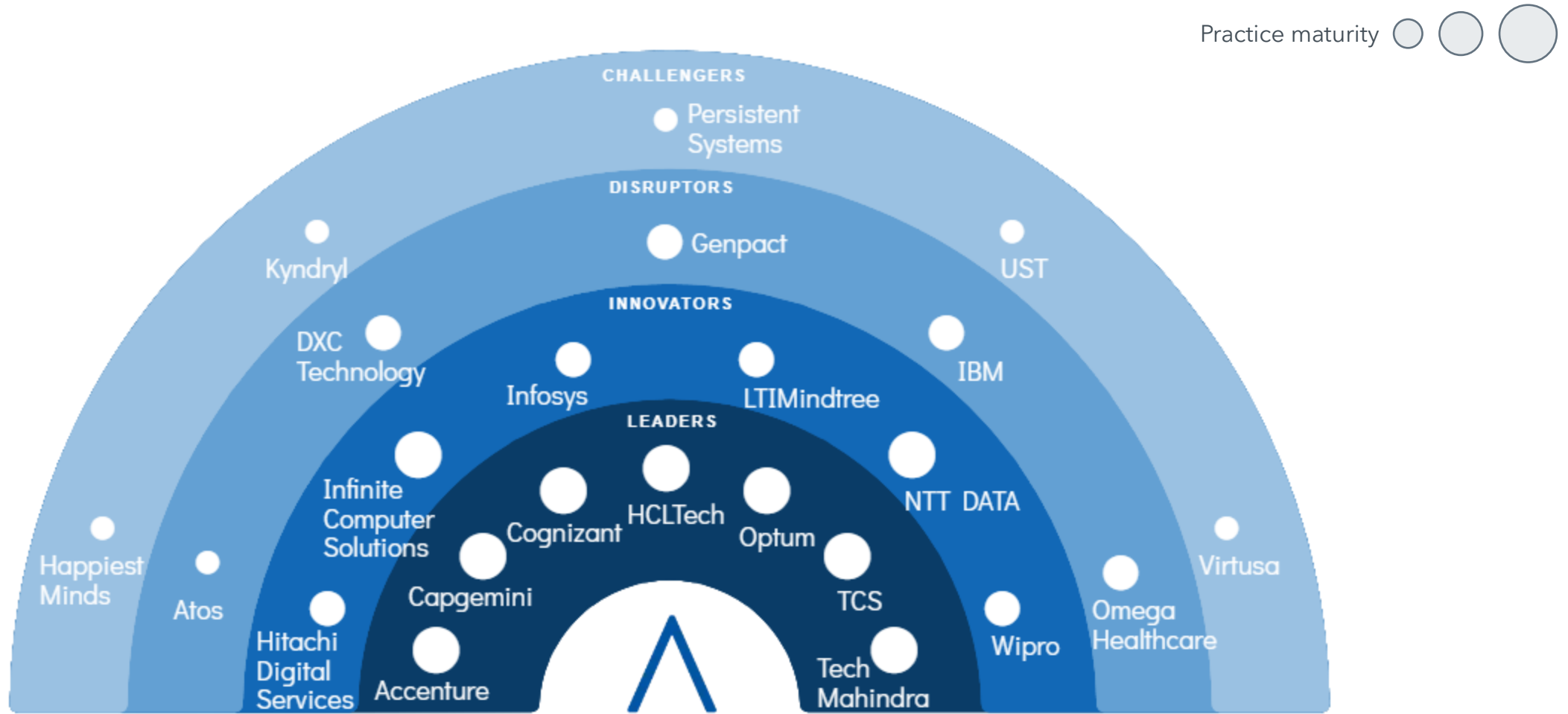
Staffing shortages and rising burnout prompt a shift toward new roles, flexible work models, and targeted training to maintain care quality and coverage

Enterprise response

- Healthcare providers are leveraging intelligent automation and predictive analytics to proactively manage denials, reduce bad debt, and accelerate revenue cycle performance, driving financial resilience and operational efficiency.
- Healthcare provider global capability centers (GCCs) are evolving beyond offshore delivery; now serving as innovation hubs for AI, data transformation, and operational excellence to drive growth and digital maturity.
- Healthcare providers are moving away from fee-for-service by forming coordinated care teams, integrating behavioral health into primary care, and using data to improve outcomes and manage costs.
- They are advancing population health by detecting risks early, expanding preventive care, and using technology to coordinate care and manage chronic conditions across communities.
- Healthcare providers are integrating digital tools, wearables, and health apps to help patients self-monitor chronic conditions, act on early warnings, and manage their health more proactively.
- They are expanding remote care capabilities through telehealth services, remote patient monitoring for chronic disease management and post-hospitalization follow-ups, and deploying virtual diagnostics and virtual hospitals to extend care beyond traditional settings.
- Healthcare providers are implementing FHIR*-based APIs and data mapping tools to connect hospital systems, labs, and devices, making patient data accessible across platforms.
- They are implementing consent management systems to ensure patients control how their data is shared while meeting compliance requirements.
- Healthcare providers are introducing AI-assisted tools and remote monitoring solutions to ease clinical workloads and reduce burnout.
- They are creating new roles in digital health and analytics while training staff to adapt to emerging technologies and new care models.

*FHIR - Fast Healthcare Interoperability Resources

Avasant recognizes 23 top-tier service providers supporting the healthcare provider industry in digital transformation



Note: Please refer to Avasant's *Healthcare Provider Digital Services 2025 RadarView* for a detailed analysis of the providers and supply-side trends.

Healthcare providers are applying intelligent automation and predictive analytics to improve revenue cycle performance and reduce bad debt, while their GCCs are shifting from offshore operations to becoming hubs for AI-driven innovation and operational excellence

IT service providers are helping healthcare providers automate revenue processes, connect disparate systems, scale AI-powered solutions, and build GCCs that support automation, AI, and continuous operational improvement.

Virtusa has entered a multiyear strategic partnership with IHH Healthcare to drive digital transformation across Singapore, Malaysia, India, and other key markets. The initiative will modernize IHH's technology platforms, streamline workflows, and implement Gen AI and agentic AI solutions spanning patient care, hospital management, and billing.

Zulekha Healthcare Group has partnered with Oracle to drive a major digital transformation by implementing Oracle Health Foundation electronic health record (EHR) and Oracle Fusion Cloud ERP systems. This collaboration aims to automate clinical and business processes, streamline patient life cycle management, and unify finance, pharmacy, and facility operations for better decision-making and efficiency.

Methodist Le Bonheur Healthcare has selected Ensemble Health Partners as its strategic revenue cycle management partner across its six hospitals and affiliated facilities. The collaboration focuses on leveraging advanced analytics and automation to improve claim accuracy, reduce denials, and enhance financial performance.



South Australia is the first state in Australia to roll out the Sunrise™ Electronic Medical Record system across all public hospitals and health services, including regional sites.

This enables statewide access to patient records, improving care coordination and clinical decision-making.



HCA Healthcare has launched its first GCC in Hyderabad to accelerate digital transformation and data-driven innovation. The center will focus on advanced analytics, IT operations, and global support functions, reinforcing HCA's commitment to enhancing healthcare delivery through technology.

Healthcare providers are moving beyond fee-for-service by coordinating care teams, integrating behavioral health, and using data and technology to improve outcomes, manage costs, and support population health

IT service providers support healthcare providers in developing integrated data platforms and analytics tools that enable coordinated care teams to share information seamlessly, identify patient risks early, and manage population health more effectively.



Sentara Health is expanding its behavioral health support for self-funded employer customers by deploying the Ontrak Health Engage platform. This solution offers personalized outreach, care coordination, and data-driven engagement to help members with behavioral health needs access timely and appropriate care.



CVS Health has partnered with Equip to deliver value-based behavioral healthcare focused on outcomes rather than service volume. Using tools such as PHQ-8* and GAD-7*, the program achieved strong outcomes—86% of participants improved, with notable reductions in eating disorders, depression, and anxiety symptoms.

*PHQ-8 - Patient Health Questionnaire-8
*GAD-7 - General Anxiety Disorder-7



Firstsource has collaborated with Guidehealth to advance AI-driven value-based care by integrating predictive analytics and care navigation into health plan operations. The collaboration aims to improve outcomes and reduce costs by identifying high-risk patients early and coordinating personalized interventions across care teams.



Memorial Healthcare System has launched a population health initiative using DrFirst's technology to improve medication adherence among patients with diabetes. By integrating real-time prescription fill data into its Epic EHR, the system identifies patients at risk of non-adherence and engages them through telehealth and digital tools for timely interventions.



Duke-NUS Medical School, in collaboration with SingHealth, is intensifying its focus on population health through technology-enabled research. The initiative aims to address chronic disease management and health equity by leveraging digital tools and data analytics to better understand and respond to community health needs.

Healthcare providers are using digital tools and remote technologies to help patients manage chronic conditions, respond to early warnings, and receive care beyond traditional settings

IT service providers are creating digital front door solutions and integrating wearables, health apps, and remote monitoring devices, enabling real-time data sharing between patients and clinicians.

Geisinger

Geisinger, in collaboration with Healthy.io and Boehringer Ingelheim, implemented the MinuteKidney™ smartphone-powered test to enhance albuminuria identification among patients with diabetes and hypertension. The program significantly increased screening completion rates and early diagnosis of chronic kidney disease, enabling timely follow-up care and medication interventions.



Salford Royal Hospital, part of the Northern Care Alliance NHS Foundation Trust, is collaborating with Hitachi to develop the UK's first fully integrated "digital hospital." This partnership focuses on creating a virtual hospital model that leverages advanced technologies such as IoT, AI, and telehealth to improve patient flow, reduce hospital stays, and deliver care beyond traditional settings.



OSF HealthCare, in collaboration with Meridian Health Plan of Illinois and the Centene Foundation, has launched a new mobile maternity care unit aimed at improving access to prenatal and postpartum services for underserved communities. Backed by a \$1.5 million grant, this initiative will deliver essential maternal health services directly to patients, helping reduce disparities and improve outcomes for mothers and babies across Illinois.



Apollo HealthAxis has partnered with Garmin to implement continuous health tracking for chronic disease management, leveraging wearable technology to improve health outcomes. This initiative focuses on underserved communities, using real-time biometric data from Garmin devices integrated into Apollo's health management platform to support proactive care and early intervention.



Mayo Clinic has partnered with Medicia.ai to codevelop THRIVE+, a comprehensive digital health platform designed specifically for cancer survivors. This initiative aims to enhance long-term survivorship care by integrating Mayo Clinic's clinical expertise with Medicia.ai's advanced AI capabilities to deliver personalized, scalable support for post-treatment recovery and wellness.

Healthcare providers are using FHIR-based APIs and consent management systems to make patient data accessible across platforms while ensuring patients control how their data is shared in line with regulations





IT service providers support healthcare organizations by developing and implementing FHIR-based APIs and data mapping tools that enable seamless interoperability between disparate hospital systems, labs, and medical devices.

Regulatory guidelines

- In July 2025, CMS launched a patient-centric initiative backed by major tech firms to advance its Interoperability Framework, enabling seamless data exchange across healthcare systems while ensuring individuals have timely access to their health records and control over data sharing through strengthened consent mechanisms.
- In March 2025, the European Health Data Space Regulation came into force, initiating a structured transition to enable secure cross-border health data exchange, empower individuals with greater control over their EHRs, and establish interoperable infrastructures to support both primary healthcare and secondary use for research and innovation across EU member states.
- In December 2024, the US Department of Health and Human Services proposed updates to the HIPAA Security Rule requiring hospitals and health systems to strengthen cybersecurity protections for electronic health data, including written documentation of consent policies and safeguards to ensure patients retain control over how their information is accessed and shared across digital systems.

Enterprise

Summary

	<p>Onyx and Midato Health have partnered to advance consent-enabled interoperability across CMS-aligned networks, focusing on giving patients greater control over how their health data is shared. The collaboration leverages Onyx's expertise in FHIR-based APIs and Midato's consent management capabilities to support secure, standards-based data exchange that aligns with federal interoperability goals.</p>
	<p>Altera Digital Health and Health Gorilla announced a strategic partnership in June 2025 to accelerate healthcare interoperability and data exchange across care settings. The collaboration integrates Health Gorilla's Qualified Health Information Network (QHIN) into Altera's Sunrise™ EHR platform, enabling clinicians at mid-size hospitals and health systems to access longitudinal patient records—including labs, medications, and social determinants of health directly within their workflows.</p>
	<p>CommonWell Health Alliance launched the CommonWell Marketplace, a platform designed to help healthcare providers adopt prequalified interoperability solutions without needing custom integrations. Developed with ELLKAY and Clinical Architecture, the Marketplace supports FHIR® and XCA standards, enabling seamless data exchange, deduplication, and normalization across health systems, while also integrating supplemental datasets such as labs, pharmacy, and social determinants of health.</p>
	<p>Velatura and J&B Medical have partnered to launch Consent Manager+, an AI-driven platform designed to streamline and digitize patient consent management across healthcare settings. The solution enables real-time, secure consent capture and sharing, helping providers and patients manage authorizations efficiently while supporting interoperability across health information exchanges.</p>

Healthcare providers are using AI tools and remote monitoring to ease clinical workloads while also developing new digital health and analytics roles and training staff for emerging care models

IT service providers support healthcare organizations by integrating AI and remote monitoring technologies, streamlining data workflows, enabling secure information sharing, and providing training so that staff can adapt to new digital health roles and tools.



Mass General Brigham's study found that medical scribes reduced physicians' time spent on EHRs by approximately 30%, significantly decreasing administrative burden and allowing providers to dedicate more time to patient care. This intervention demonstrated measurable improvements in clinical efficiency and physician workflow.



Nebraska Medicine achieved a nearly 50% reduction in first-year nurse turnover by implementing the Laudio AI platform, which streamlined workflows, automated key tasks, and provided actionable insights to foster timely, personalized engagement with nursing staff. This platform helped proactively address burnout and improve retention through over 27,000 meaningful team interactions.



Northwestern Medicine's digital pathology platform reduces physician burnout by streamlining case reviews and enabling remote collaboration. Seamless digital access to slides and consultations across hospitals minimizes repetitive tasks and supports more efficient, flexible diagnostics.



Trustwise, Health Innovation KSS, Hitachi Digital Services, and Further codeveloped MedAssist GPT, a generative AI platform for medical education that provides real-time, personalized clinical guidance aligned with UK standards. Integrating over 700 National Institute for Health and Care Excellence guidelines and 30,000 medicines, it lets students simulate clinical scenarios, practice safe prescribing, and receive instant feedback.



The Early Detection using IT in Health trial, launched in the UK, is a world-leading initiative evaluating AI's effectiveness in breast cancer screening by allowing AI to replace one of the two required radiologist reviews for mammograms. This approach aims to help radiologists by reducing their workload, potentially lessening physician burnout, while maintaining accuracy in breast cancer detection.



The European Union's €12.4 million SUSA Project, launched in January 2025, aims to boost digital skills in healthcare by integrating AI, data analytics, and cybersecurity into education. It will deliver 46 degree programs and 16 lifelong learning modules across 12 universities, targeting over 6,500 graduates and 660 professionals to enhance patient care and system efficiency.

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Cognizant profile

Cognizant: RadarView profile



- Practice maturity ★★★★★
- Investments & innovation ★★★★★
- Partner ecosystem ★★★★★

Demonstrates comprehensive coverage across the healthcare provider value chain through its platforms, domain solutions, and digital investments.

Practice overview

- Practice size: 11,000-12,000
- Active clients: 340+ health systems
- Delivery highlights: Delivery centers in 100+ locations

\$5.9B Health services revenue, FY 2024	\$19.7B Overall revenue, FY 2024
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Industry-specific solutions/offerings

Neuro® AI Accelerator	A cloud solution that enables healthcare providers to deploy Gen AI agents and traditional AI models using legacy data to drive KPI-aligned outcomes
Neuro IT Operations	A Gen AI platform that helps healthcare providers streamline IT operations, cut complexity, and empower engineers with efficient tools for innovation
Flowsource™	A Gen AI platform that enables healthcare providers to simplify engineering workflows by removing barriers and offering a unified environment
Skygrade™	A solution that helps healthcare providers accelerate their shift to cloud-native architecture with tools and methodologies for agility and scalability

Sample clients

- A Boston-based integrated delivery system
- A Greensboro-based not-for-profit healthcare system
- A New York-based hospital network
- An Ohio-based healthcare system
- A US-based health-related service provider
- A US-based hospital network

Partnerships/alliances

Adobe	Collaborated to build Shared Investigator Platform that accelerates clinical trials by streamlining collaboration	PHILIPS	Partnered to deliver digital health solutions that enable the digital transformation of healthcare providers
MuleSoft	Partnered with MuleSoft to empower healthcare providers with FHIR-compatible APIs and over 50 prebuilt integrations	NVIDIA	Collaborated to combine Gen AI with the BioNeMo platform to help healthcare providers accelerate drug discovery by analyzing biomedical data
snowflake	Collaborated to help healthcare providers build scalable data architectures and unified analytics by delivering conformed data models	IBM	Partnered through joint solution labs and development centers to cocreate tailored healthcare solutions

Value chain coverage

Appointment and preauthorization
Clinical diagnosis
Treatment and care delivery
Patient experience
Research and innovation
Health information management
Revenue cycle management

Darker color indicates higher industry concentration: ●●●●●



Cognizant: RadarView profile

Case studies

Client	Capability	Summary	Business impact
A US-based health-related service provider	<ul style="list-style-type: none"> Cloud Analytics Automation 	<ul style="list-style-type: none"> The client was experiencing patient volume leakage to nearby academic and community medical systems. It sought a strategy to strengthen both physician and patient engagement. Cognizant designed and deployed an integrated clinical call center powered by Onvida, an omnichannel cloud-based engagement and workflow platform, within 90 days. The solution streamlined communication, narrowed the provider-hospital gap to under 30 minutes, and enabled over 100 use cases, including remote patient monitoring, care coordination, and admissions support. 	<ul style="list-style-type: none"> Reduced patient no-shows by 15% Reduced congestive heart failure/chronic obstructive pulmonary disease readmissions by 21.5% Ensured timely follow-ups within 48 hours of discharge Improved patient retention, operational efficiency, and overall care quality
A Boston-based integrated delivery system	<ul style="list-style-type: none"> Generative AI Analytics Cybersecurity Cloud 	<ul style="list-style-type: none"> The client struggled with siloed on-premises data that slowed access, increased security risks, and limited scalability, restricting its ability to enhance patient care and operational efficiency. Cognizant partnered with the client to execute a comprehensive data modernization program, migrating diverse data sources, extract, transform, and load (ETL), and reporting tools to a unified cloud platform powered by Snowflake and Microsoft Azure. The solution enhanced clinical and operational decision-making with real-time, unified data access, enabling AI/ML integration, including generative AI. 	<ul style="list-style-type: none"> Reduced effort by 20%-30% Accelerated time to insight across the HR, supply chain, and revenue cycle functions Unified siloed data into a secure cloud platform Enhanced data security, compliance, and scalability, enabling the health system to handle growing data volumes and maintain operational resilience
A US-based hospital network	<ul style="list-style-type: none"> Analytics Cloud 	<ul style="list-style-type: none"> The client needed a secure, user-friendly platform to unify insights from 42 siloed data sources. The fragmented environment limited efficiency, slowed decision-making, and created challenges in governance and scalability. Cognizant delivered a modern, cloud-based data platform using Azure Synapse Data Warehouse and Pipelines, integrating data from over 40 sources within a reusable, metadata-driven framework with auditing features. 	<ul style="list-style-type: none"> Reduced integration timelines from 6-8 months to 3 months, enabling quicker access to insights Migrated the data warehouse to Azure in five months Enabled over 200 users to adopt Agile, boosting responsiveness and efficiency
An Ohio-based healthcare system	<ul style="list-style-type: none"> Analytics Automation Cloud 	<ul style="list-style-type: none"> The client faced rising claim rejections, extended accounts receivable timelines, and cash flow challenges. The client sought a solution to reduce denials, improve collections, and strengthen financial resilience. Cognizant deployed the certified regulatory compliance manager Cognizant® Revenue Cycle Management solution, leveraging a cloud-based performance enhancement engine with automation to improve process quality and outcomes. 	<ul style="list-style-type: none"> Reduced claim denials by 30%, minimizing revenue leakage Increased revenue by \$13M, strengthening financial performance Improved daily collections by 25%, accelerating cash flow and receivables

Cognizant: RadarView profile

Analyst insights

Practice maturity



- Cognizant's Healthcare Provider practice is one of its largest verticals within Health Sciences, contributing significantly to company revenues and supported by 11,000-12,000 professionals. The practice serves a wide client base, including health systems, hospitals, community clinics, dental and primary health organizations, and home care networks. Its service coverage spans the entire provider value chain, patient experience, clinical operations, revenue cycle management (RCM), supply chain, HR, finance and accounting, IT modernization, and compliance.
- Its solutions portfolio includes advanced platforms and accelerators such as Neuro AI for care delivery, decision support, and automation; Onvida for omnichannel patient engagement and follow-up; TriZetto RCM Workflow and ARM Pro for denial management; and OneCare for IoMT-enabled virtual care. It also offers industry-specific digital engineering solutions for portals, AI/ML-driven insights for social determinants of health, predictive analytics for readmissions, supply chain planning and optimization tools (the iNtelligent suite), as well as automation-led F&A modernization and shared services frameworks. These solutions deliver measurable improvements across billing, collections, patient engagement, and operations.

Investments and innovation



- Cognizant is advancing through global delivery expansion, innovation hubs, workforce skilling, and strategic acquisitions. With over 100 delivery centers and a growing nearshore presence, it delivers scalable and cost-efficient services. The Health Sciences Innovation Center and global R&D labs drive AI, genomics, and clinical research, strengthened by hyperscaler partnerships for Gen AI use cases.
- It expands its digital capabilities through large-scale skilling (over 164K associates trained and 50K certifications) and acquisitions like Collaborative Solutions, Thirdera, and Mobica. Platforms such as TriZetto® Digital Platform and Connected Interoperability Solution further enable secure data exchange, automation, and cost savings, helping providers cut costs, modernize operations, and improve patient outcomes.

Partner ecosystem



- Cognizant partners with Google Cloud, Microsoft, and AWS to drive cloud adoption, Gen AI solutions, and healthcare data modernization. Key initiatives include a \$1B Gen AI investment with Google, TriZetto on Azure, and large-scale AWS-enabled modernization. It collaborated with Salesforce and ServiceNow to support healthcare workflows, automation, and digital engagement.
- It works with Oracle, Philips, NVIDIA, and Snowflake to enhance clinical trials, connected health, drug discovery, and data architecture in healthcare innovation. It partnered with Palo Alto, CyberArk, Cisco, and Radware to strengthen data protection, while alliances with Automation Anywhere, Appian, and Rockwell simplify provider operations through automation and low-code platforms.

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Appendix:
About RadarView

The *Healthcare Provider Digital Services 2025 RadarView* assesses providers across three critical dimensions

Practice maturity

- This dimension evaluates the type, market acceptance, and quality of offerings in the healthcare providers space. It also assesses the strength of the overall practice with respect to its size, certified employees, embedded expertise in emerging technologies, and value chain coverage.
- The width and depth of the client base, practice revenues, the use of proprietary/outsourced tools and platforms, and future strategy are important factors that contribute to this dimension.

Investments and innovation

- This dimension measures the strategic direction of investments and resultant innovations in the offerings and commercial model and how these align with the future direction of the industry.
- The overall strategic investments, both organic and inorganic, in capability and growth, technology development, and human capital development, along with the innovations that the service provider develops, are critical aspects of this dimension.

Partner ecosystem

- This dimension assesses the nature of the provider's partnerships and ecosystem engagement. It evaluates the partnership objectives (codevelopment or co-innovation) and the provider's engagement with technology solutions or product vendors, startup communities, and domain associations.
- The kind of joint development programs around offerings, go-to-market approaches, the overall depth of partnerships, and their ability to deliver superior value to clients are this dimension's important aspects.

Research methodology and coverage

Avasant has based its analysis on several sources:

Public disclosures Publicly available information from sources such as Securities and Exchange Commission filings, annual reports, quarterly earnings calls, and executive interviews and statements

Market interactions Discussions with enterprise executives leading digital initiatives and influencing service provider selection and engagement

Provider inputs Inputs collected through the service provider capability decks and structured briefings from July 2025 to September 2025

Of the 40 service providers assessed, the following are the final 23 featured in the *Healthcare Provider Digital Services 2025 RadarView*:



The image displays 23 logos of service providers arranged in a grid. The logos include: accenture, Capgemini, EVIDEN, cognizant, DXC TECHNOLOGY, genpact, happiest minds, HCLTech, Hitachi Digital Services, IBM, infinite, Infosys, kyndryl, LTIMindtree, NTT DATA, Omega Healthcare, Optum, TECH mahindra, UST, tcs TATA CONSULTANCY SERVICES, Persistent, virtusa, and wipro.

RadarView Classifications

Avasant has recognized service providers in four classifications:



Leaders show consistent excellence across all key dimensions of the RadarView assessment (practice maturity, investments and innovation, and partner ecosystem) and have had a superior impact on the market as a whole. These service providers have shown true creativity and innovation and have established trends and best practices for the industry. They have proven their commitment to the industry and are recognized as thought leaders, setting the standard for the rest of the industry to follow. Leaders display a superior quality of execution and a reliable depth and breadth across verticals.



Innovators show a penchant for reinventing concepts and avenues, changing the very nature of how things are done from the ground up. Unlike leaders, innovators have chosen to dominate in a few select areas or industries and distinguish themselves through superior innovation. These radicals are always hungry to create pioneering advancements in the industry and are actively sought after as trailblazers, redefining the rules of the game.



Disruptors enjoy inverting established norms and developing novel approaches that invigorate the industry. These service providers choose to have a razor-sharp focus on a few specific areas and address those at a high level of granularity and commitment, which results in tectonic shifts. While disruptors might not have the consistent depth and breadth across many verticals like leaders or the innovation capabilities of innovators, they exhibit superior capabilities in their areas of focus.



Challengers strive to break the mold and develop groundbreaking techniques, technologies, and methodologies on their way to establishing a unique position. While they may not have the scale of the service providers in other categories, challengers are eager and nimble and use their high speed of execution to great effect as they scale heights in the industry. Challengers have a track record of delivering quality projects for their most demanding Global 2000 clients. In select areas and industries, challengers might have capabilities that match or exceed those of the providers in other categories.

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