ISG Provider Lens®

Healthcare Digital Services

Provider Digital Transformation

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

Customized report courtesy of:

TECH mahindra

QUADRANT REPORT | DECEMBER 2025 | U.S.

Table of Contents

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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.**

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.

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.

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.

Provider Positioning

Page 1 of 4

	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

Provider Positioning

Page 2 of 4

	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

Provider Positioning

Page 3 of 4

	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

Provider Positioning

Page 4 of 4

	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

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

- **Payer Digital Transformation**
- **Provider Digital Transformation**
- **Value-based Care**
- **Interoperability and Data Security**

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.

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).

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.

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

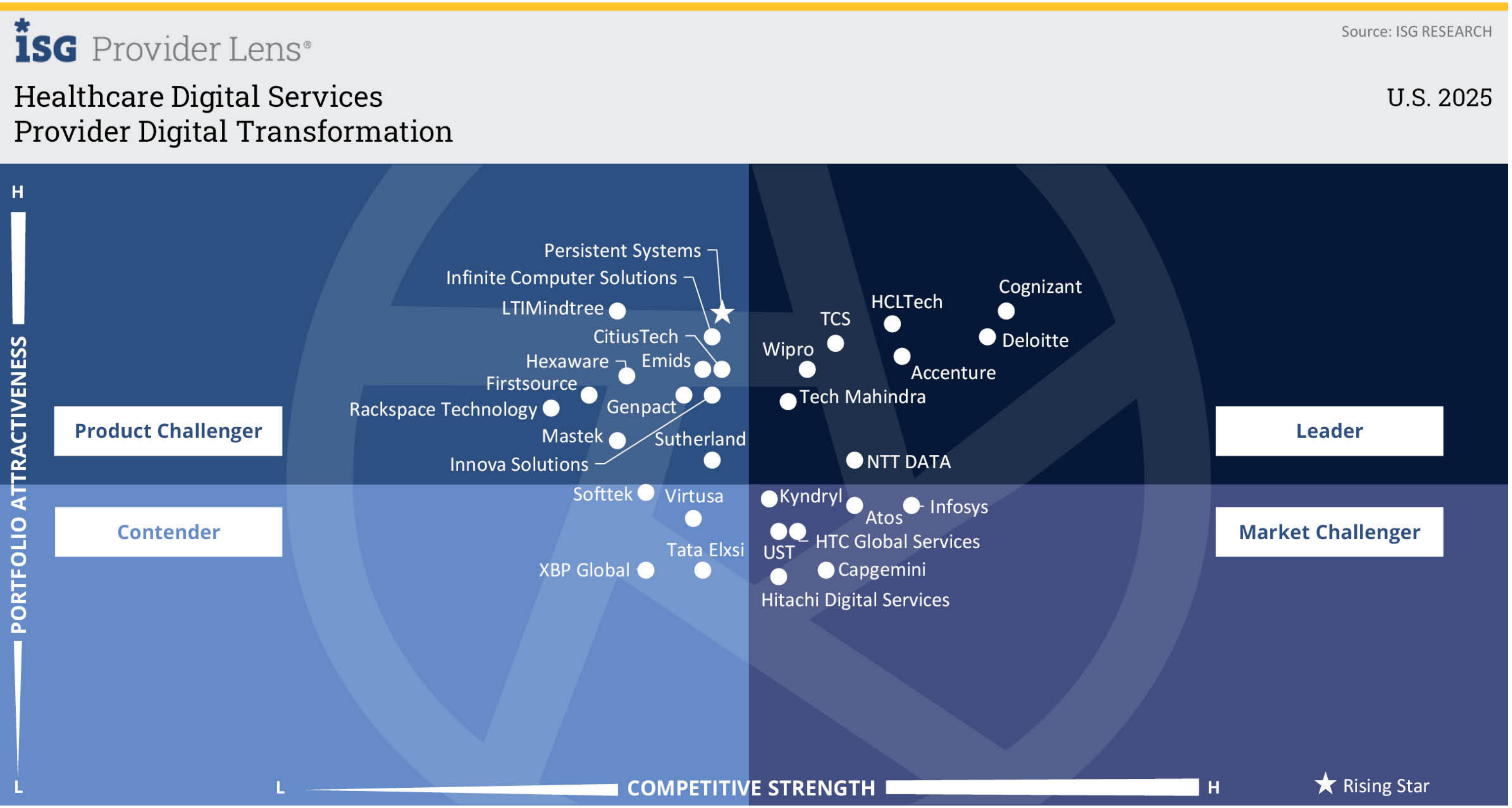
Should read this report to explore how providers leverage scalable architecture, automation, interoperability and cloud platforms to support healthcare modernization. It offers a clear comparison of technical strengths, helping organizations choose partners that align with digital roadmaps and improve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



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

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**

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

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

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

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

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

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

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

Leader

"Tech Mahindra is a comprehensive digital health orchestrator that combines AI, interoperability and experience engineering for next-generation providers."

Sneha Jayanth

Tech Mahindra

Overview

Tech Mahindra is headquartered in Pune, India. It has more than 148,700 employees in over 90 countries. In FY25, the company generated $6.4 billion in revenue, with IT Services as its largest segment. Tech Mahindra is a leader in enabling AI-driven, interoperable transformation and operational agility across provider digital ecosystems, with a strong leadership in the U.S. market, supporting provider organizations through cloud modernization and AI-infused operational workflows tailored to regulatory and compliance needs.

Strengths

Holistic healthcare modernization: Tech Mahindra delivers end-to-end provider digital transformation by integrating cloud, data and experience engineering. It modernizes legacy systems into interoperable, cloud-native architectures, while enhancing patient, clinician and operational workflows. Its portfolio spans EHR transformation, connected health and next-generation care management.

Global delivery strength and partnerships: Backed by global partnerships with cloud, data and enterprise leaders, Tech Mahindra blends innovation with execution scale. Its coinnovation labs and delivery centers enhance responsiveness and domain depth, positioning it as a strong Leader in the Provider Digital Transformation quadrant.

AI-infused operational agility: Through advanced analytics and explainable AI, Tech Mahindra automates documentation, enhances population health prediction and enables intelligent care coordination. Its AI frameworks foster adaptive, compliant healthcare ecosystems that improve cost efficiency, accuracy and decision-making agility.

Interoperability and platform integration: Tech Mahindra's interoperability and API-based platforms ensure real-time data exchange across EHRs, IoMT and payer ecosystems, strengthening compliance and connected care analytics. This platform-driven model strengthens value-based analytics, technology alignment, and compliance for connected, outcome-driven care.

Caution

Tech Mahindra's integrated, AI-infused healthcare solutions demonstrate strong transformation capabilities; increasing investment in specialized healthcare IP and domain-centric accelerators would further reinforce its leadership and sustain momentum in provider digital innovation.

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.

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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:

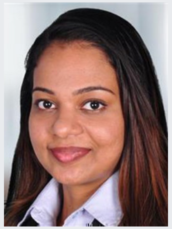
1. Definition of Healthcare Digital Services market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Leverage ISG's internal databases and advisor knowledge & experience (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

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.

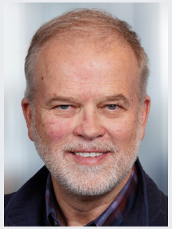
Study Sponsor

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.

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™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

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ISG

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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.

ISG Provider Lens®

DECEMBER, 2025

REPORT: HEALTHCARE DIGITAL SERVICES