



Everest Group Healthcare Data and Analytics Services PEAK Matrix[®] Assessment 2023

Focus on NTT DATA

June 2023



Introduction

Data and analytics is increasingly playing a critical role in healthcare enterprises' growth strategies, given the increasing importance of data-driven decision-making in the healthcare industry. While in the past, the focus of data and analytics services was primarily on only reducing costs and optimizing operations, it has given way to a renewed emphasis on enhancing health outcomes and customer experience. The healthcare industry is currently experiencing a significant increase in investments in advanced analytics and data integration to enable the implementation of use cases in key areas such as value-based care, population health, interoperability, and data privacy. Even though payers are still ahead of providers when it comes to data and analytics adoption, providers are quickly catching up, the trend has partly been accelerated by the pandemic. Service providers can help to assist healthcare enterprises in defining their data and analytics strategy and roadmap, upgrading their infrastructure, extracting valuable insights, and offering relevant recommendations for enterprise-level decision-making that ultimately delivers tangible business benefits.

In this research, we present an assessment and detailed profiles of 35 service providers featured on the **Healthcare Data and Analytics Services PEAK Matrix®**. Each provider profile provides a comprehensive picture of its service focus, key Intellectual Property (IP) / solutions, domain investments, and case studies. The assessment is based on Everest Group's annual RFI process for the calendar year 2023, interactions with leading service providers, client reference checks, and ongoing analysis of the healthcare data and analytics services market.

The full report includes the profiles of the following 35 leading service providers featured on the [Healthcare Data and Analytics Services PEAK Matrix® Assessment 2023](#):

- **Leaders:** Accenture, Cognizant, Deloitte, EXL, HCLTech, NTT DATA, Optum, and TCS
- **Major Contenders:** Atos, CitiusTech, Concentrix, DXC Technology, Emids, EPAM, EY, Fractal Analytics, Genpact, HARMAN DTS, IBM, Infinite Computer Solutions, Infosys, Innova Solutions, LTIMindtree, Persistent Systems, PwC, SoftServe, Tech Mahindra, Virtusa, and Wipro
- **Aspirants:** Apexon, Capgemini, GAVS, Marlabs, Mastek, and Smart Data Solutions

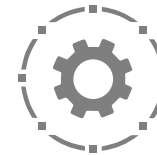
Scope of this report



Geography
Global



Providers
Healthcare (payer and provider)



Services
Data & analytics services

Healthcare data and analytics services PEAK Matrix® characteristics

Leaders

Accenture, Cognizant, Deloitte, EXL, HCLTech, NTT DATA, Optum, and TCS

- Leaders position themselves as strategic partners to healthcare enterprises and are willing to invest in the latest and greatest in technologies to get an edge over competition
- They exhibit strong thought leadership, domain and technical expertise, and a dedication to innovation. They harness their wide network of technology partners to create unique data and analytics use cases specific to healthcare and showcase a proactive approach to delivering these solutions to clients
- Leaders offer a wide portfolio of healthcare-specific solutions across the entire data and analytics value chain and have made investments in mergers and acquisitions to further strengthen their capabilities

Major Contenders

Atos, CitiusTech, Concentrix, DXC Technology, Emids, EPAM, EY, Fractal Analytics, Genpact, HARMAN DTS, IBM, Infinite Computer Solutions, Infosys, Innova Solutions, LTIMindtree, Persistent Systems, PwC, SoftServe, Tech Mahindra, Virtusa, and Wipro

- Major Contenders have made cost-effectiveness and strong client responsiveness as major pillars of their engagements with healthcare enterprises, helping them to retain a loyal base of satisfied customers for their healthcare data and analytics services
- While their portfolio of offerings might not be as impressive as that of the Leaders, Major Contenders are investing heavily in partnerships with technology vendors and acquisitions of niche providers to augment their capabilities and gain a foothold in the market

Aspirants

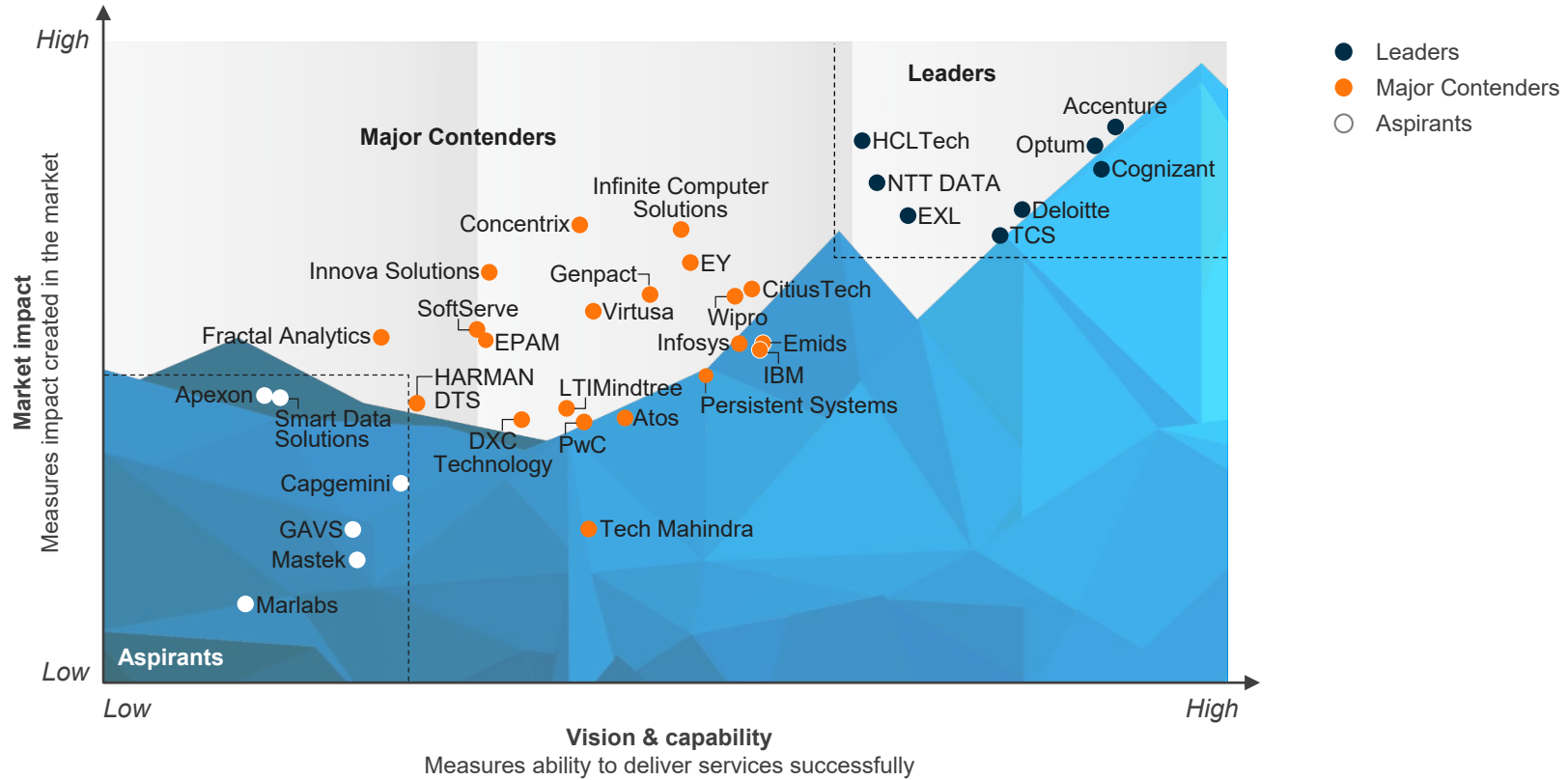
Apexon, Capgemini, GAVS, Marlabs, Mastek, and Smart Data Solutions

- Aspirants need to address capability gaps in their offerings by building more IP across the data and analytics value chain
- It is essential for them to build a more robust technology partnership ecosystem and make calculated investments to expand their data and analytics capabilities and improve their market presence and brand recall

Everest Group PEAK Matrix®

Healthcare Data and Analytics Services PEAK Matrix® Assessment 2023 | NTT DATA is positioned as a Leader

Everest Group Healthcare Data and Analytics Services PEAK Matrix® Assessment 2023¹



¹ Assessments for Atos, Capgemini, Deloitte, DXC Technology, EY, IBM, Infosys, PwC, Tech Mahindra, and Wipro exclude service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interactions with healthcare buyers
Source: Everest Group (2023)

NTT DATA profile (page 1 of 4)

Overview

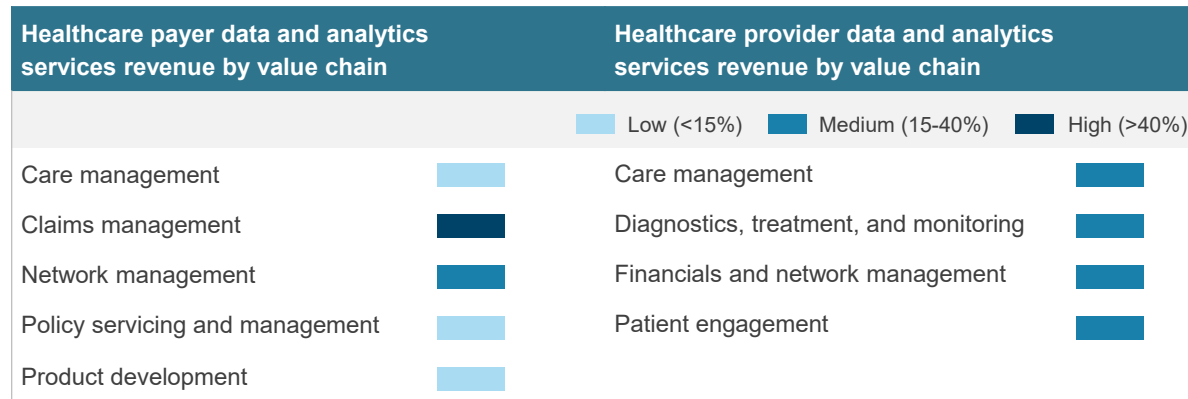
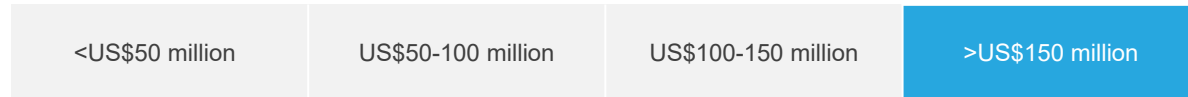
Company mission/vision statement

NTT DATA's mission is to realize its group vision of being a trusted global innovator and to create a society with secure, safe, and long-lasting living conditions using technology while ensuring accessibility and affordability. It also aims to provide its customers with actionable insights to help them achieve high-value and data-driven outcomes as a result of a fully enabled data and intelligence value stream across the enterprise.

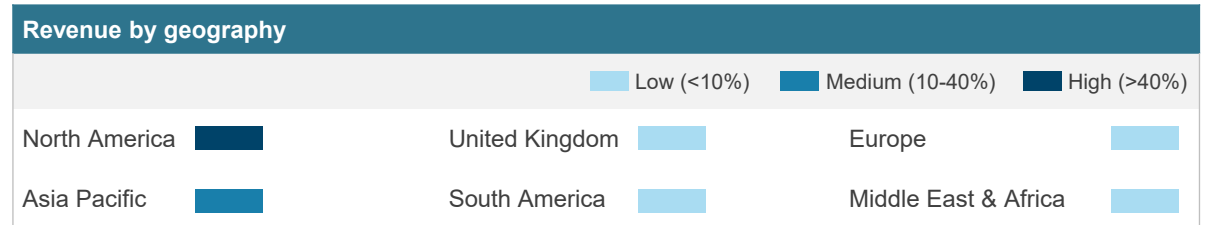
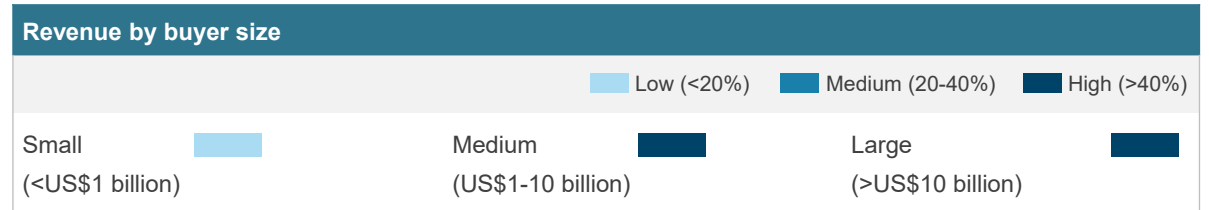
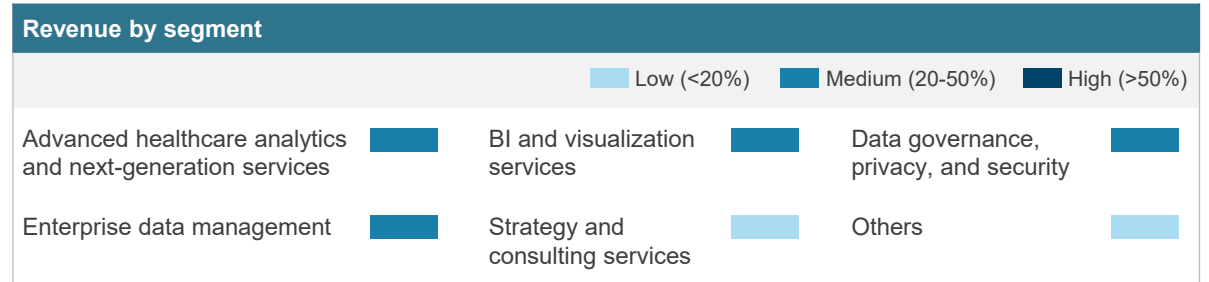
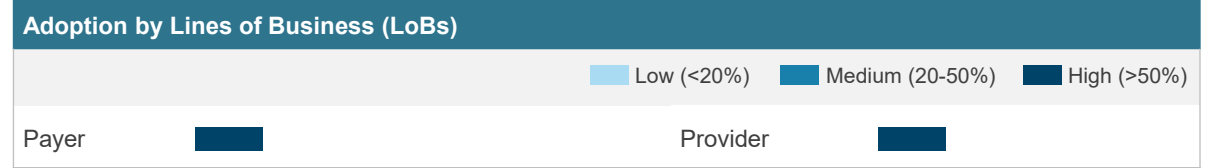
Overview of the client base

It works with more than 120 health systems and health plans which include some of the largest U.S health systems and health plans, mid-sized health systems, hospitals, national, Blues and regional health plans. Some of its clients include – Community Health Plan of Washington, Point32 Health (Harvard Pilgrim Health Care), BCBS of Rhode Island, Independent Health, and ALN.

Healthcare D&A services revenue



NOT EXHAUSTIVE



NTT DATA profile (page 2 of 4)

Case studies and frameworks

NOT EXHAUSTIVE

Case study 1	Helped define relevant quality metrics criteria
<p>Business challenge The client, a non-profit integrated system health plan needed quality ratings to meet state regulatory needs.</p> <p>Solution NTT DATA employed Snowflake, Snowsight, Snowsql, Snowpipe, and Tableau. It also collaborated with a business that offers provider sanctioned, near real-time data from more than 20,000 primary sources, with its provider data based on more than 15 years' worth of historical data from medical professionals. It assisted the client in complying with state standards by establishing pertinent quality measurement criteria and putting them into practice for all contractual providers across the entire organization. It also helped client retain competitive position within a service area and developed a quality metrics display for internal and external stakeholders.</p> <p>Impact Helped maintain competitive status within a service area</p>	

Case study 2	Leveraged next-generation chronic disease care management system to identify potential care management candidates
<p>Business challenge The client wanted to effectively monitor members' care transitions, ensure prompt follow-ups that have an impact on specific HEDIS measures under the managing chronic conditions HD2 category, and run a series of predictive exercises to identify candidates not previously targeted for care management who are high risk or with emerging risk behavior.</p> <p>Solution NTT DATA assisted in identifying thousands of potential care management candidates and high-risk members by cost and service utilization with the support of its next-generation chronic disease care management system. It enabled savings of \$26 million for type 2 diabetes and \$17 million for COPD, thereby enabling the transformation of care management with the implementation of focused enterprise care management programs.</p> <p>Impact</p> <ul style="list-style-type: none"> • Saved \$26 million for type 2 diabetes and \$17 million for COPD • Enabled the transformation of care management with the implementation of focused enterprise care management programs 	

Consultative frameworks (representative list)

Framework	Details
NTT DATA Digital Health Platform/Business Insights Engine (BIE)	It is a pre-built, customizable health plan data hub that was created by users, for users, on the Azure/Snowflake platform. Pre-constructed data ingestion pipelines and microservices that use a canonical data model specific to health plans offer full/customizable 360-degree views for executive dashboards and member, provider, and claims dashboards with natural search across all entities
NTT DATA Hospital-at-Home	It is a system that makes use of a straightforward and integrated digital model to allow at-home care technology to communicate with the hospitals. Nucleus for Healthcare from NTT DATA offers capabilities in workflow creation, partner integration, and visualization.

NTT DATA profile (page 3 of 4)

Proprietary solutions and key events

NOT EXHAUSTIVE

Proprietary solutions for healthcare D&A services (representative list)

Solution	Details
Medical cost management/payment integrity	It is a solution that brings a comprehensive or unified picture of high-value data products to the health plan's payment integrity at an enterprise level. Its package of medical cost management and analytics tools includes an analytical engine, audit and visualization applications/dashboards, and rule engines based on workflow.
CarePro	It is a suite of AI-enabled analytical services for patient care management that can analyze clinical data for member risk assessment, care gap analytics, population segmentation, and utilization management to enhance health outcomes and lower healthcare costs.
NTT DATA Advocate AI	Advocate AI is a service indexing clinical imaging and report data across multiple sites & sources to engineer pharma solutions, monitor outcomes using imaging, and providing curated data for Artificial Intelligence (AI) advancement. Advocate AI partners with Rhino Health to build federated global network for unlocking siloed healthcare data. solution for developing unstructured diagnostic report data extraction to enhance clinical operations consultancy and prospective revenue prospects.
NTT DATA AI for chronic disease care management	It is an AI-based system that tracks the prevalence, severity, and evolution of health conditions in member populations over time in order to help health systems make timely decisions and improve outcomes. It is a solution for personalized care management.
NTT DATA Healthcare Provider Analytics (HePA)	It is a future proof healthcare data platform that provides vital insights for bettering digital patient care and enables the supply of clinical applications.










Key events (representative list)

Event name	Type of event	Details
Apisero	Acquisition	Acquired Apisero, which added 500 Salesforce consultants and more than 1,500 certified MuleSoft consultants to NTT DATA's team of digital transformation resources
Hashmap	Acquisition	Acquired Hashmap, a Snowflake elite partner with whom Databricks and several other top cloud, data, and technology companies have joint ventures. These alliances, together with NTT DATA's preexisting connections with organizations like Snowflake and Dataiku, increased its capacity to quicken clients' digital transformation processes and build a solid data foundation for operationalizing and scaling AI.
Healthcare AI center	Investment	Set up a healthcare AI center in Tokyo in April 2020 with 20 international members to conduct basic and applied research and development on AI technology in the healthcare business and to provide technical assistance for delivery teams.
Nashville innovation center and global innovation ecosystem	Investment	Opened a Digital Innovation and Delivery Center in Nashville in collaboration with the State of Tennessee and the City of Nashville. It made a \$9.9 million investment to create this center. The delivery center concentrates on using analytics and automation in manufacturing and healthcare. It opened innovation centers in six nations in 2022. (USA, China, Japan, Italy, Germany and India)

NTT DATA profile (page 4 of 4)

Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact				Vision & capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services	Innovation & investments	Delivery footprint	Overall
								

Strengths

- The creation of NTT DATA, Inc. to integrate all overseas entities, positions it as a partner for healthcare enterprises in their data modernization and digital transformation journey. Its healthcare-focused offerings such as its integrated data and analytics platform, Business Insights Engine (BIE), and Nucleus for Healthcare, deliver value for healthcare enterprises through data integration, data monetization, automation, advanced analytics, AI, and NLP
- NTT DATA tailors its offerings according to the data maturity of healthcare enterprises. It classifies enterprises ranging from data laggard to data disruptor and bundles its accelerators according to the requirements of each category through a consultative approach
- NTT DATA has a global mix of clients from Asia Pacific, Europe, the Middle East, North America, and South America; unlike most of its peers with clients concentrated in the US and the UK
- Clients highlighted NTT DATA's strong relationship management, deep expertise in data, and ability to bring in different problem-solving perspectives as key differentiators

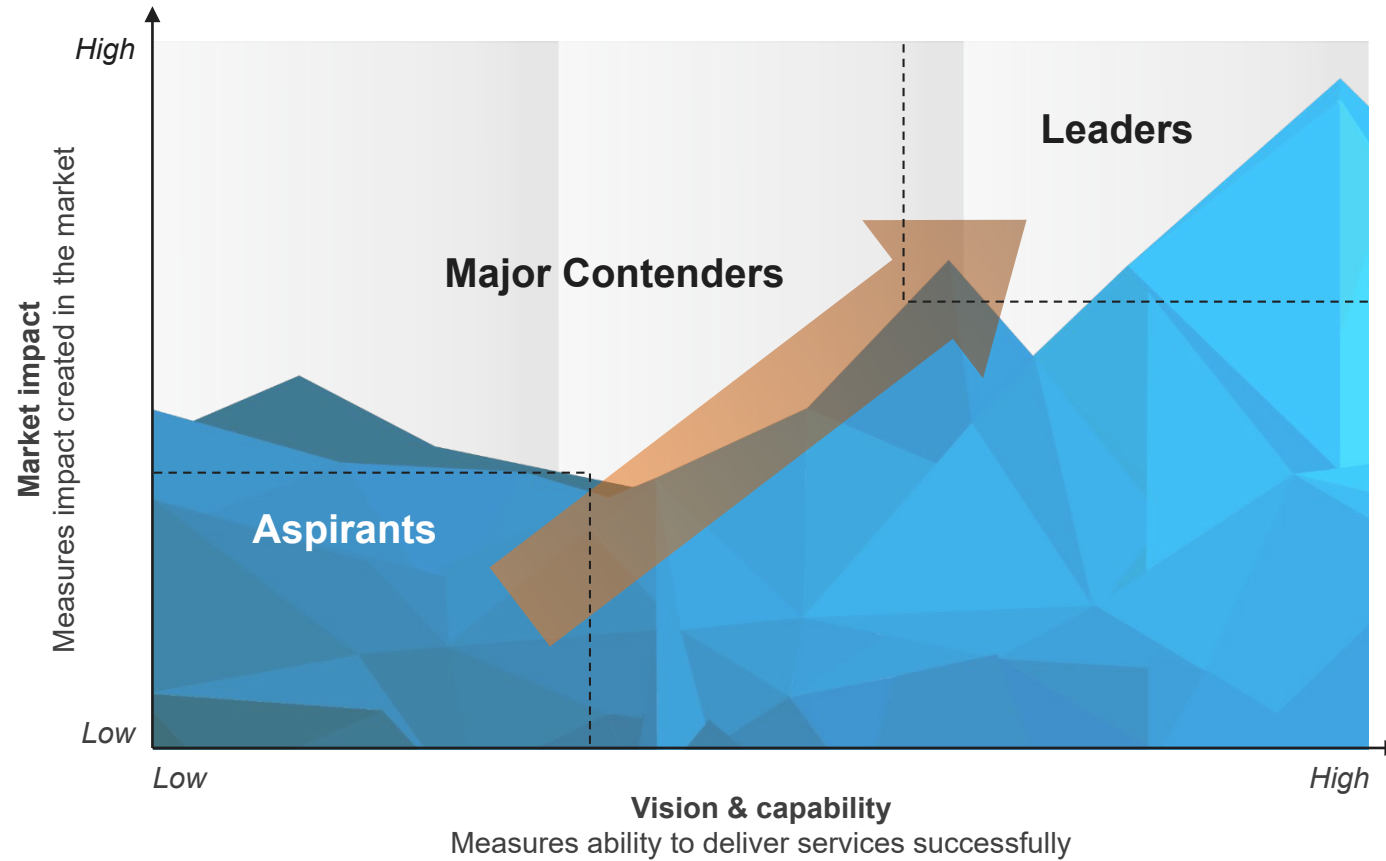
Limitations

- NTT DATA is perceived as a premium-priced provider with limited output-/outcome-based pricing in its engagements. This becomes an important consideration factor due to intensifying cost pressures, especially for healthcare providers
- NTT DATA has historically been more focused on data and analytics as a horizontal function. It needs to deepen critical domain-specific offerings, especially in the care management space
- While NTT DATA possesses data and analytics expertise, its revenue realization from advanced analytics is lower in comparison to market leaders. It can enhance its prescriptive analytics capabilities to increase market share in the advanced analytics segment

Appendix

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

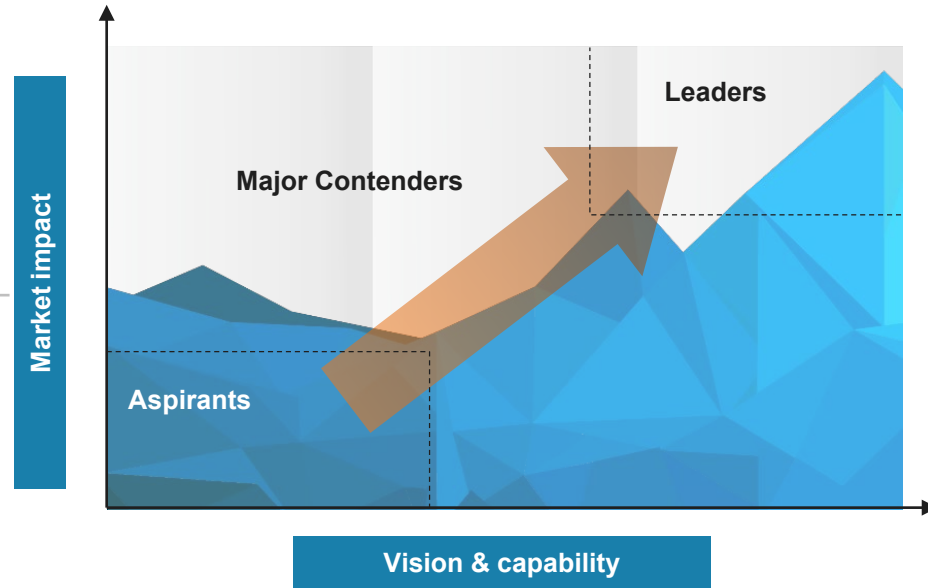
Everest Group PEAK Matrix



Services PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

- Market adoption**
Number of clients, revenue base, YoY growth, and deal value/volume
- Portfolio mix**
Diversity of client/revenue base across geographies and type of engagements
- Value delivered**
Value delivered to the client based on customer feedback and transformational impact



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

- Vision and strategy**
Vision for the client and itself; future roadmap and strategy
- Scope of services offered**
Depth and breadth of services portfolio across service subsegments/processes
- Innovation and investments**
Innovation and investment in the enabling areas, e.g., technology IP, industry/domain knowledge, innovative commercial constructs, alliances, M&A, etc.
- Delivery footprint**
Delivery footprint and global sourcing mix

FAQs

Does the PEAK Matrix® assessment incorporate any subjective criteria?

Everest Group's PEAK Matrix assessment takes an unbiased and fact-based approach that leverages provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information. In addition, we validate/fine-tune these results based on our market experience, buyer interaction, and provider/vendor briefings.

Is being a Major Contender or Aspirant on the PEAK Matrix, an unfavorable outcome?

No. The PEAK Matrix highlights and positions only the best-in-class providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition.

What other aspects of the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?

A PEAK Matrix positioning is only one aspect of Everest Group's overall assessment. In addition to assigning a Leader, Major Contender, or Aspirant label, Everest Group highlights the distinctive capabilities and unique attributes of all the providers assessed on the PEAK Matrix. The detailed metric-level assessment and associated commentary are helpful for buyers in selecting providers/vendors for their specific requirements. They also help providers/vendors demonstrate their strengths in specific areas.

What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?

- Enterprise participants receive summary of key findings from the PEAK Matrix assessment
- For providers
 - The RFI process is a vital way to help us keep current on capabilities; it forms the basis for our database – without participation, it is difficult to effectively match capabilities to buyer inquiries
 - In addition, it helps the provider/vendor organization gain brand visibility through being included in our research reports

What is the process for a provider / technology vendor to leverage its PEAK Matrix positioning?

- Providers/vendors can use their PEAK Matrix positioning or Star Performer rating in multiple ways including:
 - Issue a press release declaring positioning; see our [citation policies](#)
 - Purchase a customized PEAK Matrix profile for circulation with clients, prospects, etc. The package includes the profile as well as quotes from Everest Group analysts, which can be used in PR
 - Use PEAK Matrix badges for branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)
- The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with Everest Group; please contact your CD or [contact us](#)

Does the PEAK Matrix evaluation criteria change over a period of time?

PEAK Matrix assessments are designed to serve enterprises' current and future needs. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality and to serve enterprises' future expectations.



Everest Group is a leading research firm helping business leaders make confident decisions. We guide clients through today's market challenges and strengthen their strategies by applying contextualized problem-solving to their unique situations. This drives maximized operational and financial performance and transformative experiences. Our deep expertise and tenacious research focused on technology, business processes, and engineering through the lenses of talent, sustainability, and sourcing delivers precise and action-oriented guidance. Find further details and in-depth content at www.everestgrp.com.

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