

IDC MarketScape: U.S. Value-Based Care Strategic Consulting Services 2025-2026 Vendor Assessment

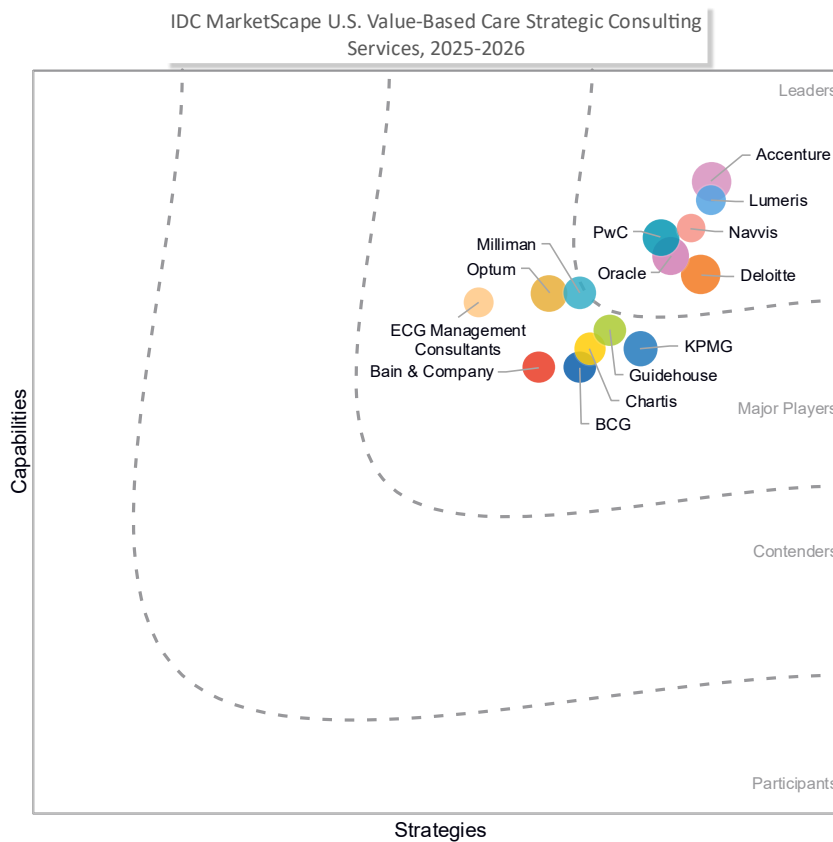
Jennifer Eaton

THIS EXCERPT FEATURES ACCENTURE AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape U.S. Value-Based Care Strategic Consulting Services Vendor Assessment



Source: IDC, 2025

See the Appendix for detailed methodology, market definition, and scoring criteria.

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: U.S. Value-Based Care Strategic Consulting Services 2025-2026 Vendor Assessment (Doc # US53010025).

IDC OPINION

Value-based care (VBC) continues to reshape how providers, payers, and systems align care quality with financial performance. While technology such as advanced analytics, artificial intelligence (AI), and automation drives data-driven decision-making, advisory and consulting services remain critical to translating technology investments into measurable outcomes.

Technology alone cannot deliver the transformation VBC demands. Advisory partners guide organizations through strategic planning, governance design, and operational change to ensure that new tools align with clinical and business objectives. They help define outcome-based performance models, structure value-based contracts, and embed analytics into workflows that advance quality, efficiency, and equity.

AI and machine learning (ML) have expanded the scope of insights available to healthcare organizations, from predicting adverse events to improving patient adherence. However, applying these insights effectively requires context and oversight. Consulting partners provide frameworks for ethical deployment, workflow optimization, and staff training to ensure insights lead to action.

Advisory services also help organizations harness data on social determinants of health (SDOH), bridging insights with community-based solutions that address the root causes of health disparities. By integrating strategy, analytics, and execution, consulting firms support scalable value creation across the healthcare ecosystem. Ultimately, value-based care succeeds when technology enablement is coupled with strategic guidance. Consulting services provide the alignment, governance, and transformation expertise necessary to convert digital capabilities into sustainable health and financial outcomes.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

Most vendors considered for inclusion in this IDC MarketScape for U.S. value-based care strategic consulting services offer outsourced and/or advisory services aimed at VBC excellence. IDC Health Insights' vendor inclusion criteria for this 2025-2026 IDC MarketScape for U.S. value-based care consulting services include the following:

- **Readiness and risk assessment:** Ability to systematically evaluate organizations' capacity for value-based care, including risk exposure analysis, process mapping, and actionable transition plans
- **Clinical workflow redesign:** Proven capabilities in reengineering clinical workflows to support value-based objectives such as care coordination and real-time data capture at the point of care
- **Population health management:** Demonstrated experience in population segmentation, risk stratification, and intervention deployment focused on coding/documentation accuracy, quality measures, cost control, and health equity
- **Data analytics interpretation:** Guidance on analytic infrastructure and outcomes for performance measurement, predictive modeling, and outcomes analysis to drive decisions within value-based frameworks
- **Technology enablement:** Support of technology tools that enable real-time outcome measurement, reporting, and continuous quality improvement in care delivery
- **Care model design and transformation:** Expertise in redesigning care delivery models to achieve value-based outcomes, including bundled payments and risk-based arrangements
- **Regulatory compliance and advisory:** Ability to guide clients through regulatory changes, compliance requirements, and industry standards relevant to value-based contracting
- **Change management and training:** Track record of enabling sustainable adoption of new practices and technologies through structured change management and staff training programs
- **Payer-provider contracting:** Experience in facilitating payer-provider negotiations, contract design, and incentive alignment in value-based arrangements
- **Use of VBC services:** Vendors that have U.S. clients that are using or have used the vendor's VBC services within the past six months
- **Provision of VBC services:** Vendors that have provided VBC services to a minimum of five U.S. customers for at least six months
- **Commitment and agree to IDC project timelines:** Vendors that should commit to making the required resources available to the IDC analyst and agree to maintain IDC project timelines

ADVICE FOR TECHNOLOGY BUYERS

VBC service buyers should:

- **Align advisory strategy with enterprise outcomes:** Engage consulting partners that tailor strategies to your organization's clinical, financial, and patient experience priorities. The right advisor should help define performance measures that directly support your value-based contracts, network performance goals, and operational readiness.
- **Pair technology investments with delivery transformation:** Do not view analytics, AI, or workflow platforms as standalone solutions. Seek advisory firms that combine digital enablement with process redesign, staffing models, and governance structures to embed technology into daily care delivery and value realization.
- **Turn data into insight-driven operations:** Prioritize consultants with the expertise to operationalize data from claims, electronic health records (EHRs), and social determinants of health. Successful advisors help design predictive workflows, care coordination triggers, and performance dashboards that drive timely interventions and measurable outcomes.
- **Facilitate stakeholder and contract alignment:** Choose partners skilled at aligning payer-provider relationships, incentive structures, and clinical practices under shared accountability. Effective advisory support ensures all stakeholders, from finance to frontline clinicians, coalesce around consistent value objectives and risk-sharing frameworks.
- **Institutionalize continuous improvement and health equity:** Work with advisors who champion iterative value-based model refinement, supported by data transparency and equity-driven design. The ideal partner helps your organization sustain improvement cycles, address disparities, and evolve programs in response to policy, market, and population shifts.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

Accenture

Accenture is positioned in the Leaders category in this 2025-2026 IDC MarketScape for U.S. value-based care strategic consulting services.

Accenture, founded in 1989 and headquartered in Dublin, Ireland, is a publicly traded global professional services company with healthcare consulting and strategy, technology, and operations practices spanning over 200 offices in 49 countries and serving clients in more than 120 nations. Accenture's VBC services, launched in 2014, now integrate advisory, technology, analytics, and managed operational services that span the full value-based care value chain for payers, providers, "payviders," and public health agencies.

Key Solutions

- **Proprietary data analytics and technology solutions:**
 - **Human Health Insights (HHI):** A health-specific, AI-powered, data and analytics solution that merges clinical, claims, and external data sets through APIs and real-time streams for population health analytics, risk stratification, care management, all supported with responsible AI protocols aimed at compliance and trust
 - **SynOps for Health:** An intelligent workflow automation platform leveraging real-time data, analytics, and AI across clinical and administrative processes — enabling monitoring of VBC metrics
 - **Processing.ai:** A proprietary AI engine employing natural language processing (NLP) and machine learning for medical record summarization, quality measure tracking, and risk adjustment coding (This AI enablement asset supports downstream processes such as predictive modeling, coding accuracy, and care gap closure analysis.)
- **Technology-agnostic advisory:** Guidance and vendor-neutral integration services for Epic, Cerner, athenahealth, cloud ecosystem platforms (e.g., Azure, AWS, Google Cloud), predictive analytics solutions (e.g., Databricks, Snowflake), and interoperability using HL7 FHIR and APIs
- **Human-centered design:** Each solution starting by addressing patient, caregiver, and clinician needs — a "people + technology + operations" philosophy that aims to drive improvement in outcomes, experience, and equity
- **End-to-end enablement:** Strategy, technology, operations, and change management delivered by global teams of clinicians, engineers, data scientists, and consultants

- **Comprehensive readiness and maturity assessment:** Utilizes Accenture's VBC Maturity Model to benchmark organizational sophistication across governance, care model, financial risk, operations, digital maturity, and analytics
- **Actionable transition road map:** Customized, impact-driven road maps for both providers and payers, such as projects related to coding/documentation and care coordination redesign, incentive alignment, analytics, and joint ventures
- **Workflow optimization:** Clinical workflow mapping and redesign supported by ML/AI, industry experience, and patient journey analytics tools
- **Population health management:** Integrated analytics for population segmentation, risk stratification, and quality improvement, powered by its suite of AI solutions, with a focus on health equity and SDOH analytics
- **Outcome measurement and analytics:** KPIs tailored to clients' clinical quality, financial performance, cost reduction, utilization, and health equity goals, supported by dashboards and interactive reporting tools augmented with benchmarking to assess performance relative to industry peers
- **Interdisciplinary teams:** Deploys consultants with business, strategy, and domain expertise; clinicians; data scientists; and technology specialists for cross-functional advisory and execution (This diverse team model also supports change management, clinician engagement, and co-creation methodology to accelerate and drive improvement.)
- **Scalable interventions and operational support:** Proven ability to co-create and scale interoperability, AI enablement, digital health, remote monitoring, and patient engagement across large populations and geographies
- **Customer base and scale:** Accenture serving many major U.S. systems, insurers, the public sector, and life sciences organizations (The company is ecosystem partners with Microsoft, AWS, Google Cloud, Salesforce, Oracle, Epic, and Cerner.)
- **Performance accountability:** Flexible, outcome-driven pricing tied to value and impact and tracked with custom dashboards and KPIs available

Strengths

- **Breadth, depth, and global scale:** Unique reach and ability to orchestrate and integrate VBC solutions across multiple care markets and large client organizations
- **Technology leadership:** Proprietary AI, workflow, analytics solutions suites, and automation platforms (e.g., HHI, SynOps, Processing.ai) combined with deep ecosystem partnerships (Epic, Cerner, Microsoft, AWS, etc.)
- **End-to-end service capability:** Integrated advisory, technology enablement, workflow design, managed services, and data modernization — one of the few vendors able to execute across all dimensions

- **Customization and innovation:** Dynamic, impact-modeled transformation road maps, agile piloting, and co-creation with clients
- **Human-centered approach:** Emphasis on workforce engagement, patient experience, and health equity as core VBC objectives
- **Performance accountability:** Success measured using value-based KPIs (e.g., clinical, operational, financial, equity) and flexible pricing models, including shared outcome incentives
- **Rapid scaling:** Capacity to deploy large-scale, cross-functional teams and scale proven interventions across diverse settings

Challenges

- **Complexity of offering:** The breadth and sophistication require strong client-side leadership alignment and may be daunting for small or immature organizations.
- **Longer ramp-up for transformation:** Accenture's engagement durations are tailored to the complexity, maturity, and strategic goals of each client's VBC journey. End-to-end technology and workforce transformation workstreams may require 6–24 months or more from readiness through scaling, though near-term wins are also possible.
- **Potential for higher cost:** Premium advisory, analytics, and technology solutions can demand significant investment and, as such, Accenture is often better suited to large, complex systems and enterprise payers and providers.
- **Customization needs:** Maximizing value from analytics, AI, and transformation tools may require higher analytic/tech maturity from clients or strong joint team alignment. Accenture's solutions are customizable and, therefore, customers/prospects must consider their unique needs identified through self-assessment as well as Accenture's operating model assessment.

Consider Accenture When

Large providers, payers, or payviders seeking an integrated partner to lead multidimensional VBC change, from strategy to tech modernization and operations, should consider Accenture. Clients needing proprietary or vendor-agnostic analytics, AI, cloud modernization, or digital/virtual care innovations along with organizations with sophisticated needs (e.g., multiple accountable care organizations [ACOs], Medicare Advantage [MA], commercial, Medicaid, and specialty lines) seeking support for benchmarking, risk adjustment, contract modeling, and technology and data integration should explore Accenture's VBC advisory offerings.

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed. It's important to recognize that a vendor's market share, as represented in this study, is a snapshot in time and may not reflect its near-term growth or consider its experience and success with related legacy products.

Vendors in the Leader category may not be the best fit for all organizations. Successful vendor selection is often dependent on the articulation of the priorities and strategy of the purchasing organization and the vendor's ability to align with those criteria.

The IDC MarketScape is a valuable representation by a neutral third party of a vendor's current capabilities and future strategy. The IDC MarketScape should not be used in a vacuum but rather as one of several inputs to short-listing vendors.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to

provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

Value-based care advisory and consulting services refer to specialized business offerings that aid healthcare providers, payers, and related entities in moving toward reimbursement mechanisms linked to patient health outcomes rather than service volume. Core services include strategic planning for value-based model implementation, care delivery redesign, digital transformation (such as EHR and telehealth integration), data analytics, financial modeling for risk-based contracts, quality metric design, compliance audits, workforce education, and outsourced operational support for all stages of the value-based care life cycle.

Key service segments include:

- **Strategy consulting:** Defining transition plans, market entry, and growth opportunities in value-based payment models
- **Operations and process optimization:** Assisting organizations in workflow redesign, revenue cycle management, and cost-control initiatives
- **IT and digital transformation:** Facilitating integration of analytics platforms, remote patient monitoring, and interoperability solutions for value-based care
- **Compliance and regulation:** Ensuring that contracts and arrangements meet evolving regulatory requirements, including Stark Law and Anti-Kickback Statute
- **Outsourced services:** Providing as-needed operational and management support, including coding, documentation, billing, and staffing resources to meet outcomes-based criteria

LEARN MORE

Related Research

- *IDC FutureScape: Worldwide Healthcare 2026 Predictions* (IDC #US53860725, October 2025)
- *IDC ProductScape: U.S. Value-Based Healthcare Analytics, 2025* (IDC #US53816025, September 2025)
- *IDC MarketScape: U.S. Value-Based Healthcare Analytics 2025 Vendor Assessment* (IDC #US53765825, September 2025)

Synopsis

This IDC MarketScape evaluates the U.S. value-based care (VBC) strategic consulting services market. The current value-based care advisory and consulting services market is both mature and rapidly evolving, driven by an increased industry focus on cost efficiency, quality outcomes, and regulatory compliance within alternative payment models. A broad array of vendors, from specialized healthcare consultancies to large, multidisciplinary firms, now compete to support payers, providers, and hybrid payvider organizations in their journey from traditional fee for service to VBC arrangements.

"An emerging theme in this market is the shift from one-size-fits-all advisory work toward tailored, iterative engagements that reflect the unique risk tolerance, capabilities, and motivations of individual healthcare organizations. Vendors that can meet this need are poised to emerge as effective and impactful partners." — Jennifer Eaton, research director, Value-Based Healthcare IT Transformation Strategies

ABOUT IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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