Healthcare Provider Network Management Market by Component (Services, Internal, Outsourcing Services, Software), Delivery (On premise and Cloud), End User (Payer, Private, Public Health Insurers), Region (North America, Europe) - Global Forecasts to 2025

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Abstracts

The healthcare provider network management market is projected to reach USD 5.8 billion by 2025 from USD 2.9 billion in 2020, at a CAGR of 14.9%. The growth of this market is driven by the implementation of stringent federal mandates in the US, the growing focus on improving the quality of care through the effective use of payer reporting requirements, the need to curtail escalating healthcare costs, and the in-house shortage of skilled personnel.

Payers will play a critical role throughout the crisis to ensure patients get the care they need at the appropriate cost. While many payer organizations find it difficult to run smoothly, companies that opted for provider network management infrastructure are functioning well. Furthermore, the pandemic has also caused extensive concerns and increasing economic hardships for consumers, businesses, and communities. With the ongoing pressure on the supply and demand side, there is potential for further market disturbance. Organizations and individuals may be experiencing liquidity stress, including limited access to credit. The deployment of provider network management solutions is vital for healthcare insurance providers, as it helps to manage providers' networks with greater efficiency, processes claims with greater accuracy, and reduces costs and errors while lowering the burden on providers. These solutions enable payers to handle clients' risks in real-time.

"The services segment is expected to hold the largest market share during the forecast period."

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On the basis of component, the healthcare provider network management market is segmented into software and services. The services segment is expected to hold the largest share of the global healthcare provider network management market in 2020. This segment's large share can be attributed to the reduced costs of services in healthcare systems and improvements in claims auto adjudication rates, operational efficiencies, and provider relationships. The services segment is further categorized as internal and external services.

“The cloud-based delivery mode segment is expected to grow at the highest rate during the forecast period.”

Based on delivery mode, the healthcare provider network management market is segmented into the on-premise delivery mode and cloud-based delivery mode. The on-premise delivery mode segment accounted for the largest share of the global healthcare provider network management market in 2019. On the other hand, the cloud-based delivery mode segment is expected to register the highest CAGR during the forecast period. Comparatively, lower capital expenses and operational costs incurred, and better scalability, flexibility, and affordability are the major factors driving the cloud-based solutions market.

“The private payers to garner large market share during the forecast period.”

Based on end users, the healthcare provider network management services market is segmented into private payers and public payers. The private payers' segment is expected to hold the largest share of the global market in 2020. The large share of this end-user segment can be attributed to the rising competitiveness among private payers to enhance their capabilities and offerings.

“The Asia Pacific healthcare provider network management market is expected to grow at the highest rate during the forecast period.” Geographically, the healthcare provider network management market is segmented into North America, Europe, Asia Pacific (APAC), and the Rest of the World. The Asia Pacific market is expected to grow at the highest rate during the forecast period. The high growth rate in APAC can be attributed to the evolution of the healthcare ecosystem, growing burden on the healthcare industry, and increasing government initiatives for HCIT adoption in the region.

Breakdown of supply-side primary interviews: • By Company Type: Tier 1 – 40%, Tier 2 – 30%, and Tier 3 – 30% • By Designation: C-level – 27%, Director-level – 18%, and

Others – 55% • By Region: North America - 50%, Europe – 27%, APAC – 15%, and RoW – 8%

Some of the major players in the market include Cognizant (US), Ayasdi, Inc. (US), Change Healthcare (US), Optum, Inc. (US), Genpact Limited (US), Infosys BPM Ltd. (India), Atos Syntel, Inc. (France), Mphasis, Ltd. (India), SKYGEN USA (US), Evolent Health, Inc. (US), OSP Labs (US), HGS Ltd. (India), Virtusa Corp. (US), EXL (US), among others.

Research Coverage

This report studies the healthcare provider network management market based on component, delivery mode, end user and region. The report also studies factors (such as drivers, restraints, opportunities, and challenges) affecting market growth. It analyzes the opportunities and challenges in the market and provides details of the competitive landscape for market leaders. Furthermore, the report analyzes micro markets with respect to their individual growth trends and forecasts the revenue of the market segments with respect to four main regions and respective countries.

Key Benefits of Buying the Report

This report focuses on various levels of analysis—industry trends, market share of top players, and company profiles, which together form basic views and analyze the competitive landscape, emerging segments of the healthcare provider network management market, and high-growth regions and their drivers, restraints, challenges, and opportunities. The report will help both established firms as well as new entrants/smaller firms to gauge the pulse of the market and garner greater market shares.

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