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Global Healthcare BPO Market: Market Estimation, Dynamics, Regional Share, Trends, Competitor Analysis 2012-2016 and Forecast 2017-2023

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Abstracts

Global Healthcare BPO Market:

Global healthcare BPO market estimated to be valued US$ XX Mn in 2017 and poised to grow at CAGR of XX% over 2017-2023. Market for healthcare BPO is projected to reach US$ XX Mn by 2023.

Business Process Outsourcing (BPO) is a process where healthcare providers select the most appropriate third party vendors for some of the specific business procedures. It allows the hospitals and medical professionals to spend their energy and valuable time on patient care rather than doing some paper work in the office. Healthcare BPO is a solution for clients to adopt intelligent approaches that will support the organization to reduce the cost pressures and increase in the overall productivity. Healthcare BPO market provides various solutions, such as front-end services, customer account setup, billing & account receivables, provider network services, enrollment services, claims services, Medicare services, membership services, and pharmacy benefits management.

Healthcare BPO market is primarily driven by a few key factors such as lack of in-house trained professionals for specific processes, cost-effective availability of workforce, and lack of industry knowledge. The pressure to decrease delivery costs healthcare sector, rise in number of insurance seeking patients, pharmaceutical companies facing patent expiries, consolidation of the healthcare systems and implementation of the ICD-10 codes and lower cost of manufacturing in developing countries are the major drivers for the healthcare BPO market. However, with the ongoing trends in the healthcare BPO, customers face challenges in data security & reliability, increasing regulatory

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compliance, and handling huge amount of healthcare data, fear of losing the control over many outsourced process, probability of decreased quality of services or products, and insecurity for the data are the factors anticipated to hamper the healthcare BPO market growth.

Healthcare BPO market is segmented on the basis of provider services, payer services, pharmaceutical services, end users, and geographical regions.

Healthcare BPO Market by provider services:

- Medical Billing
- Medical Coding
- Medical Transcription
- Finance & Accounts

Healthcare BPO Market by payer services:

- Integrated Front-end Services and Back-office Operations
- Provider Management
- Claims Management
- Billing and Accounts Management
- HR
- Analytics and Fraud Management
- Member Management

Healthcare BPO Market by pharmaceutical service:

- Manufacturing

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Research and Development

Non-clinical Services

Sales and Marketing

Supply Chain Management and Logistics

Other Non-clinical Functions

HR

Finance and Accounts

IT

Healthcare BPO Market by end-user:

Hospital

Dental Clinics

Public Service

Others

The major factor that drives the growth of healthcare BPO is increase in development of healthcare IT. Furthermore, new business models & processes and increase in use of digital technologies in healthcare are driving the growth of healthcare BPO market. Globally healthcare BPO market is expected to grow with a significant CAGR from 2016 to 2027. Rise in geriatric population is expected to be major factor, owing to the susceptibility to several health issues which includes respiratory disorders, cardiovascular diseases (CVD), eye care problems, orthopedic disorders, cancers etc. and rise in the prevalence rate of those diseases led to the increased amount of work for insurance companies. Hence, in order to handle that much of data about huge pool of patients and data of the payer companies need to invest in technology, skilled

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personnel and infrastructure which led to high operational cost which is anticipated to accelerate the healthcare payer BPO market. Shift from the ICD-9 to ICD-10 coding system posed heavy workload for payers in order to up gradation of their systems, training of staff in turn increases the financial burden. The ICD-9 code system had 13,000 codes, while ICD-10 code system has nearly 68,000 codes. This variation augmented need for HR, accounting, medical coding, skilled personnel and technical operations, hence anticipated to propel the growth of the healthcare BPO markets.

Based on geography, the healthcare BPO market can be segmented into five major regions: North America, Europe, Asia-Pacific, Latin America and Middle East & Africa. Currently, North America accounts a leading position in the healthcare BPO market followed by Europe. The major driving factors that have driven the growth of the healthcare BPO market in these regions are steadily increase in changes of regulatory scenario, pressure on healthcare institutions to reduce costs and rising trends for healthcare IT, big data and cloud computing. In the forecast period, Asia-Pacific region is expected to show remarkable growth in the healthcare BPO market as it is developing at a very rapid pace and has shown the emergence of many regional players. The factors that would fuel the growth of healthcare BPO market in Asia-Pacific are increasing awareness regarding various healthcare IT solutions, increase in the number of key players and rapid development in the healthcare infrastructure across the Asian countries.

Some of the top players operating in the healthcare BPO market are IQVIA, HCL Technologies Limited, Accenture, Eli Global, IBM Corporation, Genpact Limited, Parexel, Sutherland, Hewlett-Packard Inc., Truven Health Analytics, United Health Group, Cognizant, Lonza Group Ltd, Accretive Health, Inc., Tata Consultancy Services Ltd, Xerox Corporation, Infosys Limited., and many others.

In March 2017, WNS (Holdings) Limited, acquired. Health Help, which provides benefits management across several key specialty healthcare areas, including Pain Management, Oncology, Cardiology, Orthopaedics Sleep Care and Radiology

In October 2016, IMS Health Holdings, Inc. merged with Quintiles Transnational Holdings Inc. to form Quintiles IMS Holdings

REPORT OUTLINE:

The report provides granular level information about the market size, regional market share and forecast from 2017-2023

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The report covers in-detail insights about the competitor’s overview, key findings and their key strategies

The Report Outlines drivers, restraints, challenges, and trends that are currently faced by the industry

The report tracks recent innovations, key developments and startup’s details that are working in the industry

The report provides plethora of information about market entry strategies, regulatory framework and reimbursement scenario

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