

Value Based Healthcare Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Model (Accountable Care Organization, Patient-Centered Medical Home, Pay for Performance, Bundled Payments), By Deployment (Cloud, On-premises), By End User (Hospitals, Clinics, Insurance Companies, Government, Others), By Region and Competition, 2019-2029F

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Abstracts

Global Value Based Healthcare Market was valued at USD 1.11 Trillion in 2023 and is expected to reach USD 1.62 Trillion by 2029 with a CAGR of 6.56% during the forecast period. The Global Value-Based Healthcare (VBHC) Market is rapidly evolving as healthcare systems worldwide shift from volume-driven to value-driven models. This transition emphasizes improving patient outcomes while controlling costs, focusing on quality over quantity. The VBHC framework aims to enhance the overall patient experience by aligning healthcare providers' incentives with patient health outcomes. Several factors are driving the growth of the VBHC market. The increasing healthcare costs and rising patient expectations compel healthcare providers to demonstrate the effectiveness of treatments and interventions. The aging population and the prevalence of chronic diseases necessitate a more integrated approach to care, making VBHC models more appealing. For instance, according to the article published in June 2022 under Healthcare, Aledade, a key player in value-based programs, managed 39 Medicare Shared Savings Program (MSSP) accountable care organizations across 27 states. These organizations included 467 practices and served 440,000 patients during the pandemic's spring period. This significant utilization of value-based services contributed to accelerated market growth during the pandemic, highlighting the

effectiveness and adoption of such models in improving patient care and outcomes in challenging times.

Technological advancements also play a critical role in facilitating value-based care. The adoption of electronic health records (EHRs), telemedicine, and data analytics enables healthcare providers to track patient outcomes and optimize treatment plans. These technologies support personalized care, enhancing patient engagement and satisfaction. North America holds a significant share of the VBHC market due to established healthcare infrastructure and supportive government policies. Meanwhile, Europe and the Asia-Pacific regions are witnessing rapid growth driven by increasing investments in healthcare and a rising focus on patient-centric care.

Key Market Drivers

Rising Healthcare Costs

Rising healthcare costs are a significant driver of the Global Value-Based Healthcare (VBHC) Market, prompting stakeholders to seek more efficient care models. As healthcare expenditures continue to escalate globally, both providers and payers are under pressure to demonstrate the effectiveness of their services while managing expenses. The traditional fee-for-service model incentivizes volume over value, leading to unnecessary tests, procedures, and hospitalizations that inflate costs without necessarily improving patient outcomes. In contrast, VBHC emphasizes delivering high-quality care that focuses on patient health results, which can significantly reduce long-term costs. By aligning provider incentives with measurable patient outcomes, VBHC encourages healthcare organizations to invest in preventive care, early intervention, and chronic disease management, ultimately leading to better health outcomes and lower overall costs. The increasing burden of chronic diseases and an aging population necessitate a shift towards more sustainable healthcare practices. For instance, according to data from March 2023, chronic obstructive pulmonary disease (COPD) ranks as the third leading cause of death globally, resulting in 3.23 million fatalities in 2019. Alarming, nearly 90% of COPD-related deaths among individuals under 70 occur in low- and middle-income countries (LMIC). COPD is the seventh leading cause of poor health worldwide, measured by disability-adjusted life years. In high-income countries, tobacco smoking is responsible for over 70% of COPD cases, while in LMIC, it accounts for 30–40%. Household air pollution is a significant risk factor in these regions. As payers and providers increasingly recognize the financial and operational advantages of VBHC, the market for these models is expected to expand. This shift not only addresses the pressing issue of rising costs but also promotes a healthcare system

that prioritizes patient well-being, efficiency, and the delivery of high-value care.

Increased Focus on Patient Outcomes

The increased focus on patient outcomes is a pivotal factor driving the Global Value-Based Healthcare (VBHC) Market. In contemporary healthcare, stakeholders are prioritizing not just the volume of services provided but the actual health results achieved for patients. This paradigm shift is rooted in the recognition that high-quality care directly correlates with improved patient satisfaction, adherence to treatment, and overall health status. VBHC models encourage healthcare providers to implement evidence-based practices that enhance the quality of care delivered, ultimately leading to better patient outcomes. By aligning financial incentives with health results, providers are motivated to invest in preventive measures, care coordination, and patient education, which are essential for managing chronic conditions effectively. The focus on patient outcomes fosters greater transparency, as patients become more informed and engaged in their healthcare decisions. This demand for accountability compels healthcare organizations to track and report outcomes systematically, thereby enhancing the overall quality of care. As healthcare systems worldwide continue to embrace VBHC principles, the emphasis on patient outcomes will drive innovation, improve care delivery, and create a more sustainable healthcare ecosystem that prioritizes the well-being of individuals while managing costs efficiently.

Technological Advancements

Technological advancements play a crucial role in the growth of the Global Value-Based Healthcare (VBHC) Market, revolutionizing how care is delivered and managed. Innovations such as electronic health records (EHRs), telemedicine, and data analytics enable healthcare providers to monitor patient outcomes in real-time, facilitating a more coordinated approach to care. EHRs streamline information sharing among healthcare teams, ensuring that all providers have access to a patient's complete medical history, which is essential for making informed decisions that enhance treatment effectiveness. Telemedicine expands access to care, allowing patients to consult with healthcare professionals remotely, which is particularly beneficial for those in underserved areas. Data analytics tools help healthcare organizations analyze large volumes of patient data to identify trends, measure outcomes, and develop targeted interventions that improve health results. These technologies support a shift from reactive to proactive care, emphasizing prevention and early intervention. The integration of artificial intelligence (AI) and machine learning in healthcare processes enhances decision-making and personalized treatment plans, further aligning with VBHC objectives. As these

technological innovations continue to evolve, they will play an increasingly vital role in driving the adoption and effectiveness of value-based care models, ultimately improving patient outcomes and optimizing resource allocation.

Consumer Demand for Transparency

Consumer demand for transparency is a significant driving force behind the Global Value-Based Healthcare (VBHC) Market, as patients increasingly seek clarity regarding the quality and cost of healthcare services. With the rise of health information technology and online resources, patients are now more informed and empowered to make educated decisions about their care. This heightened awareness fosters a demand for accessible information about treatment outcomes, pricing structures, and the overall value of healthcare services. In a VBHC framework, transparency is essential; it allows patients to compare the effectiveness of different providers and treatments, encouraging competition that drives improvements in care quality. By providing detailed information on health outcomes, readmission rates, and patient satisfaction scores, healthcare organizations can build trust and foster a more engaged patient population. The transparent pricing models help patients understand their financial obligations, reducing surprises related to out-of-pocket costs. As healthcare systems respond to this demand, they are increasingly implementing strategies to enhance transparency, such as standardized reporting and clear communication of treatment options. This shift not only aligns with the principles of VBHC but also promotes patient-centered care, ultimately leading to improved health outcomes and a more sustainable healthcare ecosystem.

Key Market Challenges

Data Interoperability

Data interoperability is a critical challenge for the Global Value-Based Healthcare (VBHC) Market, as it directly impacts the effective exchange and utilization of patient information across various healthcare systems. The lack of standardized data formats and protocols often hinders seamless communication between healthcare providers, making it difficult to track patient outcomes and coordinate care effectively. This fragmentation can lead to incomplete patient records, duplicated tests, and inconsistent treatment plans, ultimately compromising the quality of care. In a value-based model, where outcomes are paramount, the ability to aggregate and analyze data from diverse sources is essential for assessing performance and improving health results. Overcoming interoperability issues requires collaboration among stakeholders, including

healthcare organizations, technology vendors, and regulatory bodies, to establish common standards and frameworks. By enhancing data interoperability, the VBHC market can foster better care coordination, improve patient outcomes, and enable providers to deliver more efficient, patient-centered care.

Regulatory and Reimbursement Issues

Regulatory and reimbursement issues pose significant challenges to the Global Value-Based Healthcare (VBHC) Market, affecting its adoption and sustainability. The complex and often fragmented regulatory environment varies widely across regions, creating uncertainty for healthcare providers as they navigate compliance requirements. This inconsistency can deter investment in value-based initiatives, as organizations may be unsure of the long-term viability of reimbursement models tied to patient outcomes. The transition from traditional fee-for-service to value-based payment structures requires careful planning and adaptation, which can be daunting for many providers.

Reimbursement policies that do not adequately incentivize high-quality care or fail to recognize the value of preventive services can hinder the effectiveness of VBHC initiatives. To facilitate the growth of VBHC, it is essential for policymakers to establish clear, consistent regulations and reimbursement frameworks that encourage providers to focus on delivering high-quality care while ensuring fair compensation for their services.

Key Market Trends

Increased Adoption of Telehealth

The increased adoption of telehealth is significantly influencing the Global Value-Based Healthcare (VBHC) Market by enhancing accessibility and patient engagement. Telehealth solutions allow healthcare providers to deliver care remotely, which is particularly beneficial for patients in underserved or rural areas who may face barriers to accessing traditional healthcare services. This trend has been accelerated by the COVID-19 pandemic, which highlighted the importance of flexible care delivery models. By facilitating virtual consultations and remote monitoring, telehealth supports VBHC objectives by enabling continuous patient engagement and timely interventions. It promotes preventive care by allowing healthcare providers to monitor chronic conditions effectively and adjust treatment plans as needed. As a result, telehealth not only improves patient satisfaction but also contributes to better health outcomes, ultimately aligning with the core principles of value-based care. The ongoing integration of telehealth into standard practice is expected to continue reshaping the landscape of

healthcare delivery in the coming years.

Enhanced Data Analytics

Enhanced data analytics is a transformative trend within the Global Value-Based Healthcare (VBHC) Market, driving improvements in patient outcomes and care efficiency. By leveraging advanced analytics tools, healthcare providers can collect and analyze vast amounts of patient data, enabling them to identify trends, measure performance, and optimize treatment strategies. These insights facilitate a more personalized approach to care, as providers can tailor interventions based on individual patient needs and preferences. The data analytics supports the tracking of key performance indicators related to health outcomes, which is essential for evaluating the effectiveness of value-based care models. This capability allows healthcare organizations to make informed decisions, allocate resources more effectively, and implement evidence-based practices. As healthcare continues to embrace data-driven methodologies, the role of enhanced data analytics will be crucial in shaping the future of VBHC, ultimately promoting a more efficient, patient-centered healthcare system that prioritizes quality and value.

Segmental Insights

Model Insights

Based on the Model, Accountable Care Organizations (ACOs) are often considered dominant in the Global Value-Based Healthcare Market. ACOs emphasize coordinated care among groups of providers, sharing responsibility for patient outcomes and costs. This model encourages collaboration across healthcare settings, leading to improved patient engagement and overall health management. The shared savings model incentivizes providers to reduce unnecessary expenditures while maintaining high-quality care, making ACOs attractive to both providers and payers. Their potential for comprehensive data integration and population health management further strengthens their position, promoting efficient resource utilization and better health outcomes.

Deployment Insights

Based on the deployment segment, cloud technology dominated the Global Value-Based Healthcare Market due to its ability to facilitate data sharing, storage, and analysis across multiple healthcare systems. The cloud enables seamless interoperability, allowing healthcare providers to access and exchange patient

information in real time, which is crucial for coordinated care and improved outcomes. The cloud solutions offer scalable infrastructure, reducing the burden of costly on-premises systems and enabling smaller providers to adopt advanced analytics and electronic health records. The flexibility and cost-effectiveness of cloud technology also support remote patient monitoring and telehealth services, further enhancing patient engagement and value-based care delivery.

Regional Insights

North America is dominating the Global Value-Based Healthcare (VBHC) Market due to several interconnected factors that drive its growth and adoption. Firstly, the region has a well-established healthcare infrastructure, including advanced technology and a high level of investment in healthcare innovations. This infrastructure supports the integration of value-based care models, making it easier for providers to implement and adapt to new practices. Secondly, regulatory support, such as the Affordable Care Act (ACA) in the U.S., has incentivized the transition from traditional fee-for-service models to value-based care, promoting accountability and improved patient outcomes.

The presence of a large number of Accountable Care Organizations (ACOs) and Patient-Centered Medical Homes (PCMHs) fosters an environment conducive to VBHC, as these organizations focus on coordinated care and population health management. The increasing emphasis on patient-centered care and consumer demand for transparency in healthcare also contributes to the region's leadership in the VBHC market. The growing aging population and the rising prevalence of chronic diseases necessitate more effective and efficient care delivery models, further accelerating the shift towards value-based care. Collectively, these factors position North America as a leader in the global movement toward value-driven healthcare, setting the stage for continued growth and innovation.

Key Market Players

Siemens Healthcare AG

NextStep Solutions

McKesson Corporation

NextGen Healthcare

Genpact Limited

Athena Healthcare

Boston Consulting Group

Change Healthcare

Baker Tilly, USA, LLC

ForeSee Medical

Report Scope:

In this report, the Global Value Based Healthcare Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Value Based Healthcare Market, By Model:

Accountable Care Organization

Patient-Centered Medical Home

Pay for Performance

Bundled Payments

Value Based Healthcare Market, By Deployment:

Cloud

On-premises

Value Based Healthcare Market, By End User:

Hospitals

Clinics

Insurance Companies

Government

Others

Value Based Healthcare Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Value Based Healthcare Market.

Available Customizations:

Global Value Based Healthcare Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validations
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

4. VOICE OF CUSTOMER

5. GLOBAL VALUE BASED HEALTHCARE MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Model (Accountable Care Organization, Patient-Centered Medical Home, Pay for Performance, Bundled Payments)
 - 5.2.2. By Deployment (Cloud, On-premises)
 - 5.2.3. By End User (Hospitals, Clinics, Insurance Companies, Government, Others)

- 5.2.4. By Region
- 5.2.5. By Company (2023)
- 5.3. Market Map

6. NORTH AMERICA VALUE BASED HEALTHCARE MARKET OUTLOOK

- 6.1. Market Size & Forecast
 - 6.1.1. By Value
- 6.2. Market Share & Forecast
 - 6.2.1. By Model
 - 6.2.2. By Deployment
 - 6.2.3. By End User
 - 6.2.4. By Country
- 6.3. North America: Country Analysis
 - 6.3.1. United States Value Based Healthcare Market Outlook
 - 6.3.1.1. Market Size & Forecast
 - 6.3.1.1.1. By Value
 - 6.3.1.2. Market Share & Forecast
 - 6.3.1.2.1. By Model
 - 6.3.1.2.2. By Deployment
 - 6.3.1.2.3. By End User
 - 6.3.2. Canada Value Based Healthcare Market Outlook
 - 6.3.2.1. Market Size & Forecast
 - 6.3.2.1.1. By Value
 - 6.3.2.2. Market Share & Forecast
 - 6.3.2.2.1. By Model
 - 6.3.2.2.2. By Deployment
 - 6.3.2.2.3. By End User
 - 6.3.3. Mexico Value Based Healthcare Market Outlook
 - 6.3.3.1. Market Size & Forecast
 - 6.3.3.1.1. By Value
 - 6.3.3.2. Market Share & Forecast
 - 6.3.3.2.1. By Model
 - 6.3.3.2.2. By Deployment
 - 6.3.3.2.3. By End User

7. EUROPE VALUE BASED HEALTHCARE MARKET OUTLOOK

- 7.1. Market Size & Forecast

- 7.1.1. By Value
- 7.2. Market Share & Forecast
 - 7.2.1. By Model
 - 7.2.2. By Deployment
 - 7.2.3. By End User
 - 7.2.4. By Country
- 7.3. Europe: Country Analysis
 - 7.3.1. Germany Value Based Healthcare Market Outlook
 - 7.3.1.1. Market Size & Forecast
 - 7.3.1.1.1. By Value
 - 7.3.1.2. Market Share & Forecast
 - 7.3.1.2.1. By Model
 - 7.3.1.2.2. By Deployment
 - 7.3.1.2.3. By End User
 - 7.3.2. United Kingdom Value Based Healthcare Market Outlook
 - 7.3.2.1. Market Size & Forecast
 - 7.3.2.1.1. By Value
 - 7.3.2.2. Market Share & Forecast
 - 7.3.2.2.1. By Model
 - 7.3.2.2.2. By Deployment
 - 7.3.2.2.3. By End User
 - 7.3.3. Italy Value Based Healthcare Market Outlook
 - 7.3.3.1. Market Size & Forecast
 - 7.3.3.1.1. By Value
 - 7.3.3.2. Market Share & Forecast
 - 7.3.3.2.1. By Model
 - 7.3.3.2.2. By Deployment
 - 7.3.3.2.3. By End User
 - 7.3.4. France Value Based Healthcare Market Outlook
 - 7.3.4.1. Market Size & Forecast
 - 7.3.4.1.1. By Value
 - 7.3.4.2. Market Share & Forecast
 - 7.3.4.2.1. By Model
 - 7.3.4.2.2. By Deployment
 - 7.3.4.2.3. By End User
 - 7.3.5. Spain Value Based Healthcare Market Outlook
 - 7.3.5.1. Market Size & Forecast
 - 7.3.5.1.1. By Value
 - 7.3.5.2. Market Share & Forecast

- 7.3.5.2.1. By Model
- 7.3.5.2.2. By Deployment
- 7.3.5.2.3. By End User

8. ASIA-PACIFIC VALUE BASED HEALTHCARE MARKET OUTLOOK

- 8.1. Market Size & Forecast
 - 8.1.1. By Value
- 8.2. Market Share & Forecast
 - 8.2.1. By Model
 - 8.2.2. By Deployment
 - 8.2.3. By End User
 - 8.2.4. By Country
- 8.3. Asia-Pacific: Country Analysis
 - 8.3.1. China Value Based Healthcare Market Outlook
 - 8.3.1.1. Market Size & Forecast
 - 8.3.1.1.1. By Value
 - 8.3.1.2. Market Share & Forecast
 - 8.3.1.2.1. By Model
 - 8.3.1.2.2. By Deployment
 - 8.3.1.2.3. By End User
 - 8.3.2. India Value Based Healthcare Market Outlook
 - 8.3.2.1. Market Size & Forecast
 - 8.3.2.1.1. By Value
 - 8.3.2.2. Market Share & Forecast
 - 8.3.2.2.1. By Model
 - 8.3.2.2.2. By Deployment
 - 8.3.2.2.3. By End User
 - 8.3.3. Japan Value Based Healthcare Market Outlook
 - 8.3.3.1. Market Size & Forecast
 - 8.3.3.1.1. By Value
 - 8.3.3.2. Market Share & Forecast
 - 8.3.3.2.1. By Model
 - 8.3.3.2.2. By Deployment
 - 8.3.3.2.3. By End User
 - 8.3.4. South Korea Value Based Healthcare Market Outlook
 - 8.3.4.1. Market Size & Forecast
 - 8.3.4.1.1. By Value
 - 8.3.4.2. Market Share & Forecast

- 8.3.4.2.1. By Model
- 8.3.4.2.2. By Deployment
- 8.3.4.2.3. By End User
- 8.3.5. Australia Value Based Healthcare Market Outlook
 - 8.3.5.1. Market Size & Forecast
 - 8.3.5.1.1. By Value
 - 8.3.5.2. Market Share & Forecast
 - 8.3.5.2.1. By Model
 - 8.3.5.2.2. By Deployment
 - 8.3.5.2.3. By End User

9. SOUTH AMERICA VALUE BASED HEALTHCARE MARKET OUTLOOK

- 9.1. Market Size & Forecast
 - 9.1.1. By Value
- 9.2. Market Share & Forecast
 - 9.2.1. By Model
 - 9.2.2. By Deployment
 - 9.2.3. By End User
 - 9.2.4. By Country
- 9.3. South America: Country Analysis
 - 9.3.1. Brazil Value Based Healthcare Market Outlook
 - 9.3.1.1. Market Size & Forecast
 - 9.3.1.1.1. By Value
 - 9.3.1.2. Market Share & Forecast
 - 9.3.1.2.1. By Model
 - 9.3.1.2.2. By Deployment
 - 9.3.1.2.3. By End User
 - 9.3.2. Argentina Value Based Healthcare Market Outlook
 - 9.3.2.1. Market Size & Forecast
 - 9.3.2.1.1. By Value
 - 9.3.2.2. Market Share & Forecast
 - 9.3.2.2.1. By Model
 - 9.3.2.2.2. By Deployment
 - 9.3.2.2.3. By End User
 - 9.3.3. Colombia Value Based Healthcare Market Outlook
 - 9.3.3.1. Market Size & Forecast
 - 9.3.3.1.1. By Value
 - 9.3.3.2. Market Share & Forecast

- 9.3.3.2.1. By Model
- 9.3.3.2.2. By Deployment
- 9.3.3.2.3. By End User

10. MIDDLE EAST AND AFRICA VALUE BASED HEALTHCARE MARKET OUTLOOK

- 10.1. Market Size & Forecast
 - 10.1.1. By Value
- 10.2. Market Share & Forecast
 - 10.2.1. By Model
 - 10.2.2. By Deployment
 - 10.2.3. By End User
 - 10.2.4. By Country
- 10.3. MEA: Country Analysis
 - 10.3.1. South Africa Value Based Healthcare Market Outlook
 - 10.3.1.1. Market Size & Forecast
 - 10.3.1.1.1. By Value
 - 10.3.1.2. Market Share & Forecast
 - 10.3.1.2.1. By Model
 - 10.3.1.2.2. By Deployment
 - 10.3.1.2.3. By End User
 - 10.3.2. Saudi Arabia Value Based Healthcare Market Outlook
 - 10.3.2.1. Market Size & Forecast
 - 10.3.2.1.1. By Value
 - 10.3.2.2. Market Share & Forecast
 - 10.3.2.2.1. By Model
 - 10.3.2.2.2. By Deployment
 - 10.3.2.2.3. By End User
 - 10.3.3. UAE Value Based Healthcare Market Outlook
 - 10.3.3.1. Market Size & Forecast
 - 10.3.3.1.1. By Value
 - 10.3.3.2. Market Share & Forecast
 - 10.3.3.2.1. By Model
 - 10.3.3.2.2. By Deployment
 - 10.3.3.2.3. By End User

11. MARKET DYNAMICS

- 11.1. Drivers
- 11.2. Challenges

12. MARKET TRENDS & DEVELOPMENTS

- 12.1. Merger & Acquisition (If Any)
- 12.2. Product Launches (If Any)
- 12.3. Recent Developments

13. PORTER'S FIVE FORCES ANALYSIS

- 13.1. Competition in the Industry
- 13.2. Potential of New Entrants
- 13.3. Power of Suppliers
- 13.4. Power of Customers
- 13.5. Threat of Substitute Products

14. COMPETITIVE LANDSCAPE

- 14.1. Siemens Healthcare AG
 - 14.1.1. Business Overview
 - 14.1.2. Company Snapshot
 - 14.1.3. Products & Services
 - 14.1.4. Financials (As Reported)
 - 14.1.5. Recent Developments
 - 14.1.6. Key Personnel Details
 - 14.1.7. SWOT Analysis
- 14.2. NextStep Solutions
- 14.3. McKesson Corporation
- 14.4. NextGen Healthcare
- 14.5. Genpact Limited
- 14.6. Athena Healthcare
- 14.7. Boston Consulting Group
- 14.8. Change Healthcare
- 14.9. Baker Tilly, USA, LLC
- 14.10. ForeSee Medical

15. STRATEGIC RECOMMENDATIONS

16. ABOUT US & DISCLAIMER

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