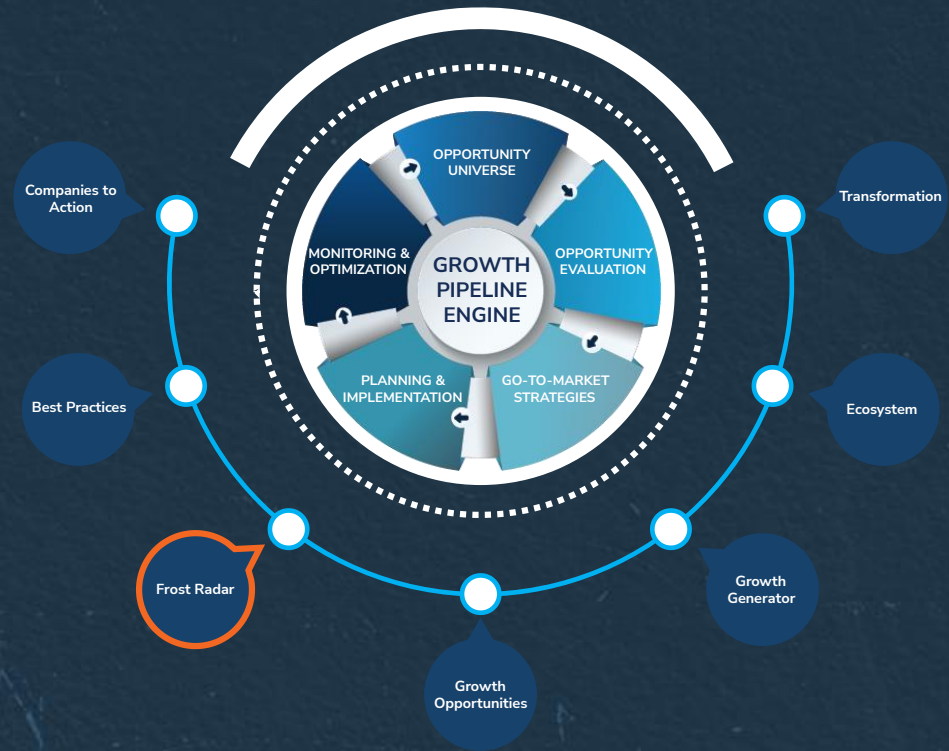


Frost Radar™: Healthcare Payer-Provider Collaboration Solutions in North America, 2025

A Benchmarking System to Spark
Companies to Action - Innovation
That Fuels New Deal Flow and
Growth Pipelines

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Strategic Imperative and Growth Environment



Strategic Imperative

- Healthcare payers and providers continue to struggle to stay afloat in a dynamic environment influenced by new trade policies, possible changes to Medicare and Medicaid programs, and investment in technology initiatives. Hospitals continue to be plagued with negative or very low operating margins, impacting their ability to provide optimal care while balancing their financial safety.
- A Frost & Sullivan analysis of [US Healthcare Claims Management Growth Opportunities](#) revealed that payers are facing higher losses and shrinking marginal revenues, with the rise in the cost of claims and regulatory burdens adding to the pressure.
- Disengaged patients, broken patient journeys, and a lack of collaboration between healthcare providers and payers are resulting in a loss of patient footfalls as patients turn to retail health, urgent care centers, and other non-traditional care sites.
- Payers and providers need robust tools and solutions that can help them curb overwhelming administrative and operational costs and enable collaboration to close care gaps. For providers and payers to retain their patients and members, it is imperative to improve performance measures and quality metrics as laid down by the National Committee for Quality Assurance (NCQA) and Centers for Medicare & Medicaid Services (CMS), such as the Health Effectiveness Data and Information Set (HEDIS) score, CMS Star Ratings, and clinical quality measures (CQM).
- Healthcare stakeholders acknowledge the need for digital infrastructure and collaboration capabilities to facilitate cross-continuum patient information exchanges and support evidence-based care at scale. Data interoperability, care management, clinical data exchange, quality management, and payment integrity solutions are in demand to improve organizational and patient experiences and outcomes, including accurate billing.

Strategic Imperative (continued)

- Payer-provider collaboration is expanding beyond data exchange or data integration capabilities to solutions that utilize this shared data to improve process flows and stakeholder experience. Five segments are considered in this Frost Radar™ analysis to assess vendor capabilities:
 - **Clinical Data Integration** is the ability to collect, connect, normalize, and use clinical data (e.g., electronic health records [EHRs], lab results, pharmacy claims, and imaging data) across different sites.
 - **Quality Improvement** helps health plans and providers improve their quality measures to boost HEDIS scores, medical loss ratio ratings, and CMS Star Ratings.
 - **Care Management** allows payers to effectively engage with patients and providers to ensure that patients receive the appropriate level of care most efficiently and cost effectively (utilization management).
 - **Financial Performance and Risk Adjustment** includes identifying, coding, and documenting all diagnoses so that payers receive fair reimbursement from CMS or Affordable Care Act (ACA) exchanges and improve fraud, waste, and abuse (FWA) detection to minimize payment integrity issues.
 - **Three-way Engagement** technology and strategies help payers and providers actively include members in their care journey through reminders, education, and two-way messaging.

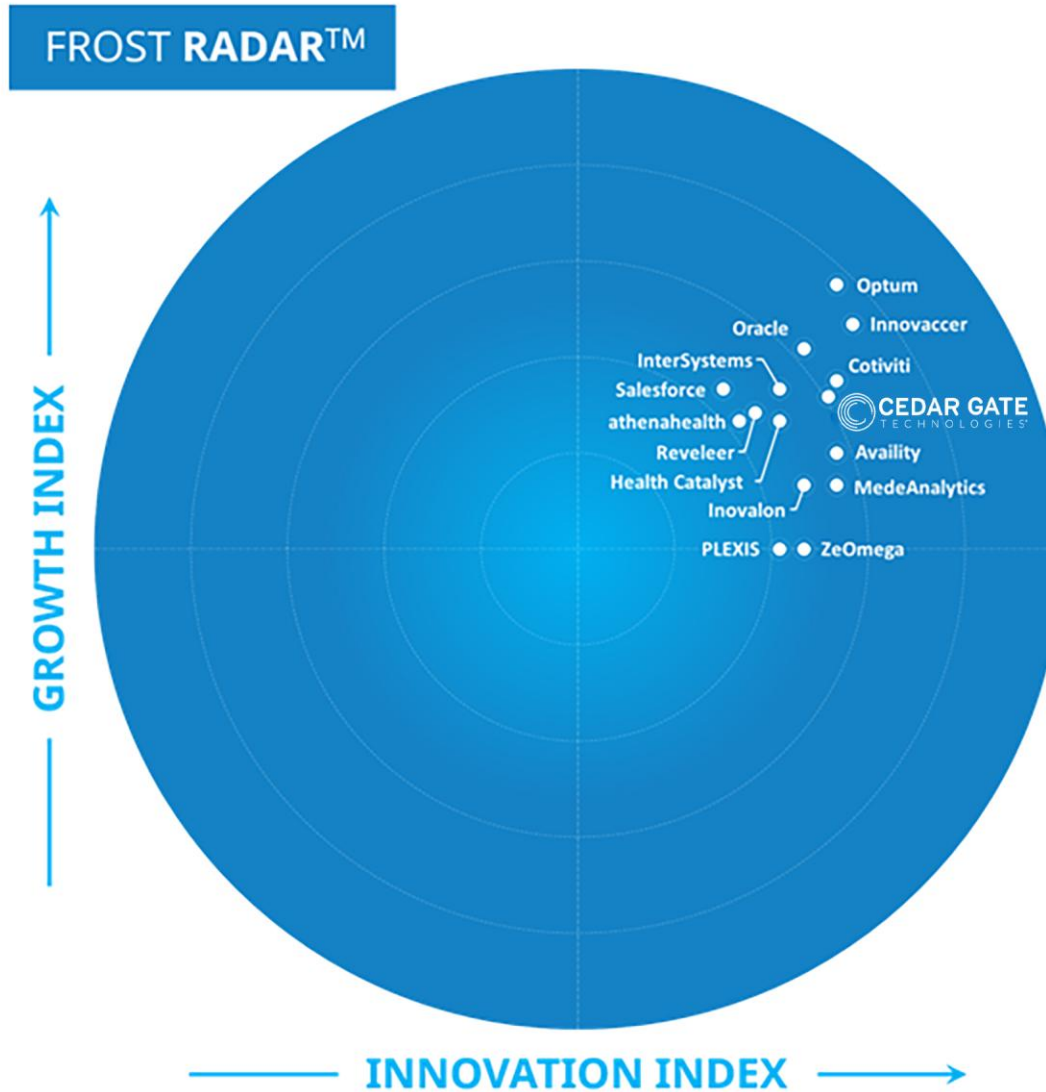
Growth Environment

- Frost & Sullivan expects the payer and provider solutions market to continue to grow as health system IT executives invest in cost-intensive and long-term data interoperability projects that adhere to FHIR, HL7, value-based contracts, and quality and performance measures as laid down by CMS and NCQA.
- As the industry transitions to value-based care (VBC) models, payers and providers will need to invest in collaboration solutions to not only care for acute and chronic patients but also embark on a population health journey so that they can keep the consumer out of high-priced treatment areas by providing sustainable and proactive care. These connected solutions improve care coordination, lower the cost of care, and enhance patient engagement and experience.
- Newer AI models—conversational AI, generative AI, and agentic AI—along with cloud, wearables, the internet of things (IoT), and remote patient management capabilities have expanded payers and providers' ability to continuously monitor their population, generate health insights, and provide actionable recommendations. In some cases, vendors have been even able to automate the action part of these insights.
- Reporting outcomes, such as CQMs, will remain an important aspect of VBC contracts. Collaborative solutions that include analytics help payers and providers identify patients for risk stratification, track high-risk patient pools, benchmark outcomes, identify areas for cost savings, and virtually report metrics to multiple payers in real time.
- Non-EHR healthcare IT vendors need to be cognizant of EHR vendors that are aiming to natively install collaboration solutions in their workflows. This will impact reliance on third-party solutions.

Frost Radar™: Healthcare Payer-Provider Collaboration Solutions in North America



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Frost Radar™ Competitive Environment

- Frost & Sullivan screened more than 100 payer-provider connectivity solution vendors in North America and shortlisted 20 for a more detailed analysis of their corporate growth potential and ability to drive visionary innovation. Of these, 15 that represent best-in-class for clinical data integration, quality management, care coordination, financial performance, and three-way engagement were chosen for inclusion on the Frost Radar™: athenahealth, Availity, Cedar Gate Technologies, Cotiviti, Health Catalyst, Innovaccer, Inovalon, InterSystems, MedeAnalytics, Optum, Oracle, PLEXIS Healthcare Systems, Reveleer, Salesforce, and ZeOmega.
- The Frost Radar™ measures growth rates in addition to absolute revenue and combines them with several other factors to measure companies' performance on the Growth Index. This is important to mention because for all companies only North American solution revenue was considered.
- Cedar Gate Technologies has worked extensively in the last three years to synergize solutions from different acquisitions and build a comprehensive collaboration platform based on prescriptive and predictive capabilities.

Frost Radar™: Companies to Action



Cedar Gate Technologies

INNOVATION

- Cedar Gate offers an end-to-end VBC platform, featuring data, analytics, care, payment, and service products, that form the base for its solutions and capability development.
- Several solutions enhance payer-provider collaboration:
 - The clinical data integration platform integrates data from more than 55 sources and provides bidirectional EHR integration. It has the capability of near-real time analysis with data going live in less than 3 minutes.
 - The quality improvement solution uses proprietary predictive models improve care quality in addition to tracking HEDIS and CMS Star Ratings.
 - An extensive suite of care management products orchestrate care team tasks associated with like condition, episode, case, and cohort. The clinical decision support system can be viewed in the EHR and provides for identification of charge capture, hierarchical condition category (HCC) coding, and care gap closure opportunities.
 - The contract modeling module is designed for actuarial teams to manage VBC contracts and execute the necessary downstream tasks to relieve the process-related administrative burden.
 - A robust provider engagement tool can be configured and tailored based on end-user requirements. The company is looking to revamp its legacy patient engagement tool that currently supports unidirectional communication.
- The company is taking steps to provide analytical insights to end users and offer prescriptive recommendations and complete the associated downstream workflows.

Cedar Gate Technologies (continued)

INNOVATION

- The platform offers side-by-side view of care gaps from EHR and health plan requirements to identify the source of these care gaps.
- Most R&D activities are conducted in-house because of a strong developer community in the Asia-Pacific region. However, it is open for collaboration in areas that might help the company bring new solutions to the market faster.
- Cedar Gate has an extensive AI solution roadmap involving both generative and agentic AI technology. The company currently only offers a conversational AI chatbot but is expected to launch an end user-facing natural language chatbot in 2025.
- Its recent innovation has focused on
 - Improving the speed and accuracy of data acquisition, cleansing, and normalization to make it actionable within 3 minutes (for ADT files);
 - Enhancing the UX and including AI chatbots to enhance user productivity;
 - Creating automated workflows to reduce care variations and direct patients to appropriate care pathways; and
 - Delivering next-generation business intelligence reporting for clients seeking more advanced capabilities.

Cedar Gate Technologies (continued)

GROWTH

- Cedar Gate Technologies has demonstrated robust and multidimensional growth over the past three years in platform impact, industry recognition, and organizational scale. It has a global workforce of more than 1,000, including 750 staff developers in Nepal.
- The company has spent the last three years establishing synergies from multiple acquisitions completed in 2020. It has created a data integration platform that encompasses the solutions from Citra Health Solutions, Deerwalk, and Enli Health Intelligence. The revamped platform has expanded Cedar Gate's reach into new segments and has helped establish its footing as a VBC enabler.
- In 2025, Cedar Gate began automating its data onboarding and optimized its platform to reliably accommodate clients with very large datasets for more than 20 million member lives.
- Cedar Gate partnered with Kairos Health Arizona to deploy its Healthcare Benefits Analytics solution. This collaboration delivered significant value: more than \$2 million in savings and an 88% reduction in partner deliverable processing time.
- The company was identified as one of the fastest growing companies by Inc. 5000 in 2024.
- Its GTM strategy aims to utilize the "Power of One" messaging to highlight an integrated platform approach leading to a single source of truth, helping end users reduce the vendor load and lower compliance risks and costs of acquisition and maintenance.

Cedar Gate Technologies (continued)

FROST PERSPECTIVE

- Cedar Gate has a strong Innovation Index score on this Frost Radar™. The company provides solutions across the five segments and enables payers and providers to optimize their VBC performance.
- To improve its position on the Frost Radar™, the company needs to focus on its growth pipeline. As a key vendor in the risk adjustment and care management space, it should next target prior authorization workflows and enable providers to submit pre-reviewed claims that have a higher propensity for first-pass approval. The tool should go beyond claim submission and support providers with tracking and denial management using autonomous workflows.
- It needs to increase its visibility in the market by sharing more frequent thought leadership pieces and expand the messaging to highlight how the same platform can support both payers and providers in achieving VBC and population health management objectives.

Best Practices & Growth Opportunities



Best Practices

1

Predictive analytics, prospective insights, and automated actions are becoming core features of solutions in this space. Market players need to accept this change and identify ways to stay abreast of agentic AI use cases that have the potential to reduce the administrative burden and enhance collaboration between stakeholders.

2

Vendors are working to combine risk and quality workflows to minimize data requests between stakeholders. This will surface all gaps in one go for providers, enabling them to prioritize their time with a patient and ensuring gap closures in minimal visits/interactions.

3

Agility is becoming a key factor following changes, such as Medicare Advantage Risk Adjustment Data Validation audits and adherence to CMS 9115 and CMS 0057 rules, being introduced in government policies. To address these changes quickly, vendors need to ensure that their product development roadmap is flexible enough to accommodate such requests and keep their clients on track with compliance requirements.

Growth Opportunities

1

Integrating generative and agentic AI capabilities for prescriptive insights and actioning will drive the adoption of new solutions and become a differentiator for vendors to acquire new clients.

2

Most companies primarily target one side of the equation and develop solutions that will improve the performance of one set of stakeholders. However, to grow and compete, vendors need to build trust as a neutral third-party solution provider so that their products can be adopted by both payers and providers.

3

As EHR vendors look to offer out-of-the box capabilities, third-party vendors should consider this as an opportunity to become the partner of choice and embed their solutions directly in EHR workflows on the provider side.

Frost Radar™ Analytics



Frost Radar™: Benchmarking Future Growth Potential

2 Major Indices, 10 Analytical Ingredients, 1 Platform

Growth Index

Growth Index (GI) is a measure of a company's growth performance and track record, along with its ability to develop and execute a fully aligned growth strategy and vision; a robust growth pipeline system; and effective market, competitor, and end-user focused sales and marketing strategies.

GI1

MARKET SHARE (PREVIOUS 3 YEARS)

This is a comparison of a company's market share relative to its competitors in a given market space for the previous 3 years.

GI2

REVENUE GROWTH (PREVIOUS 3 YEARS)

This is a look at a company's revenue growth rate for the previous 3 years in the market/industry/category that forms the context for the given Frost Radar™.

GI3

GROWTH PIPELINE

This is an evaluation of the strength and leverage of a company's growth pipeline system to continuously capture, analyze, and prioritize its universe of growth opportunities.

GI4

VISION AND STRATEGY

This is an assessment of how well a company's growth strategy is aligned with its vision. Are the investments that a company is making in new products and markets consistent with the stated vision?

GI5

SALES AND MARKETING

This is a measure of the effectiveness of a company's sales and marketing efforts in helping it drive demand and achieve its growth objectives.

Frost Radar™: Benchmarking Future Growth Potential

2 Major Indices, 10 Analytical Ingredients, 1 Platform (continued)

Innovation Index

Innovation Index (II) is a measure of a company's ability to develop products/ services/ solutions (with a clear understanding of disruptive megatrends) that are globally applicable, are able to evolve and expand to serve multiple markets and are aligned to customers' changing needs.

II1

INNOVATION SCALABILITY

This determines whether an organization's innovations are globally scalable and applicable in both developing and mature markets, and also in adjacent and non-adjacent industry verticals.

II2

RESEARCH AND DEVELOPMENT

This is a measure of the efficacy of a company's R&D strategy, as determined by the size of its R&D investment and how it feeds the innovation pipeline.

II3

PRODUCT PORTFOLIO

This is a measure of a company's product portfolio, focusing on the relative contribution of new products to its annual revenue.

II4

MEGATRENDS LEVERAGE

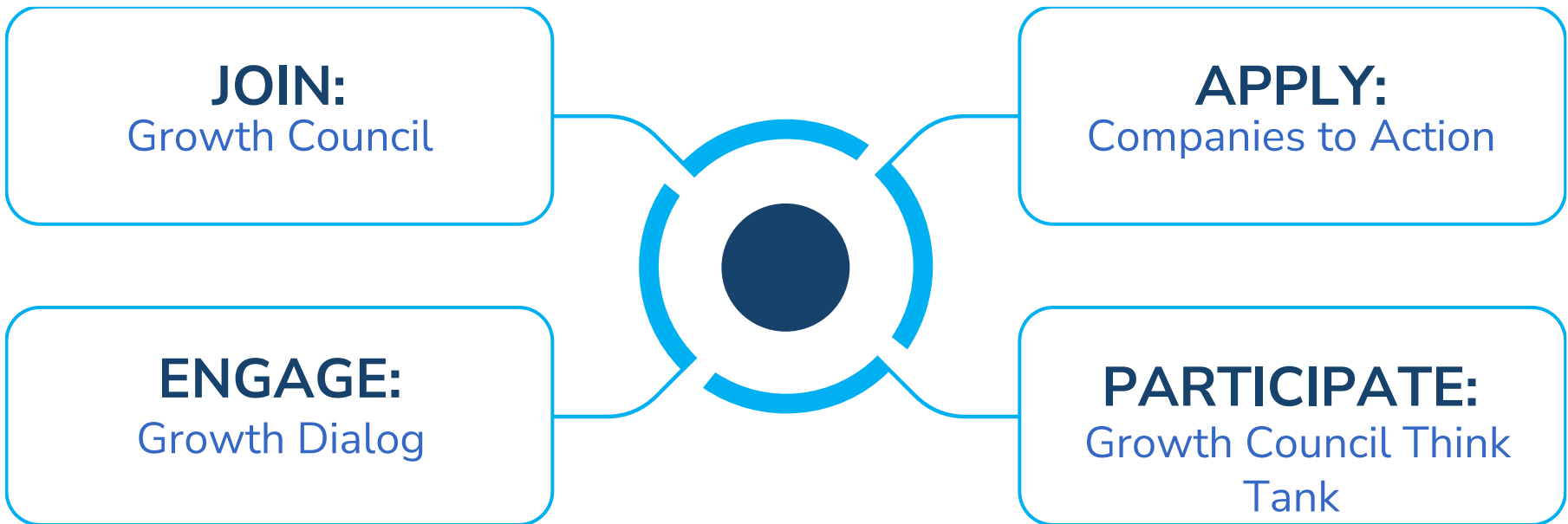
This is an assessment of a company's proactive leverage of evolving, long-term opportunities and new business models, as the foundation of its innovation pipeline. An explanation of megatrends can be found [here](#).

II5

CUSTOMER ALIGNMENT

This evaluates the applicability of a company's products/services/solutions to current and potential customers, as well as how its innovation strategy is influenced by evolving customer needs.

Next Steps



Does your current system support rapid adaptation to emerging opportunities?

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