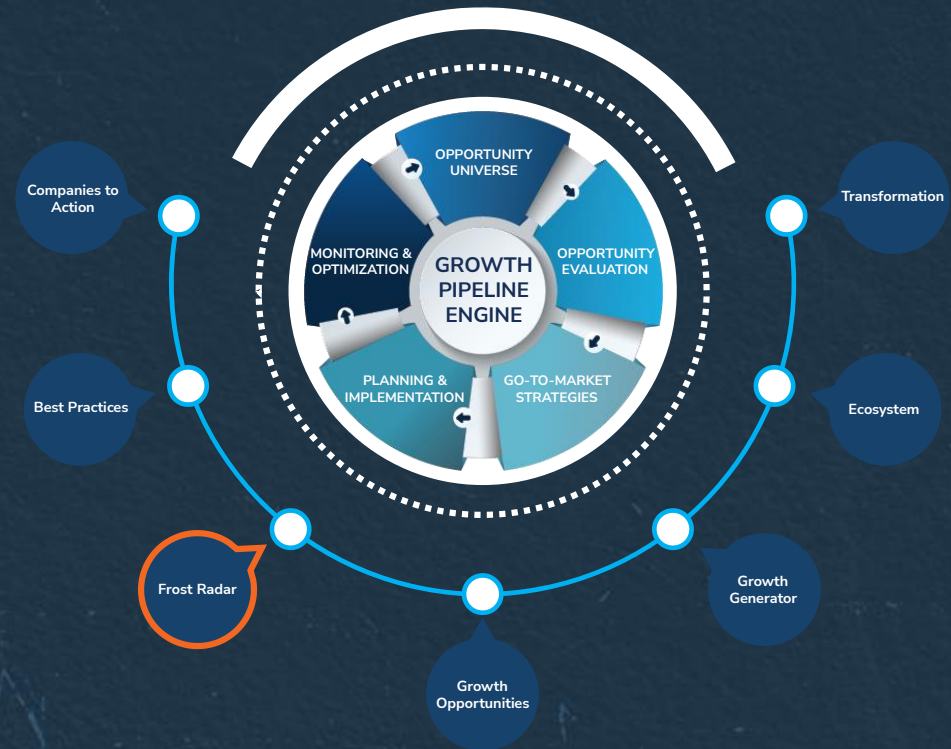


Frost Radar™: US Population Health Management, 2026

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



PLWW-48
June 2026

Strategic Imperative and Growth Environment



Strategic Imperative

- **Population health is evolving from analytics platforms to execution-oriented operating systems:** Healthcare organizations increasingly expect PHM platforms to move beyond retrospective analytics and risk identification toward direct execution of clinical, operational, and financial interventions. Buyers are prioritizing platforms that can connect insights with action through embedded workflows, care coordination, patient engagement, risk adjustment, quality management, and value-based care execution. As a result, PHM vendors are evolving into population health operating systems that orchestrate activities across providers, care teams, and patients while reducing workflow fragmentation and administrative burden.
- **Payer-provider data convergence is becoming the foundation of value-based care success:** As organizations assume greater financial accountability through Medicare Advantage, MSSP, ACOs, and other risk-based arrangements, PHM success increasingly depends on the ability to unify clinical, claims, quality, utilization, and financial data. Vendors are investing heavily in longitudinal patient views, attribution management, risk adjustment, cost and utilization analytics, and interoperability frameworks that enable actionable intelligence across payer and provider ecosystems. Data activation is becoming a critical competitive differentiator as organizations seek a complete view of population performance.
- **AI is shifting from insight generation to workflow orchestration and intervention prioritization:** Artificial intelligence is rapidly moving beyond predictive analytics and reporting into operational decision support, workflow automation, and intervention management. PHM vendors are increasingly deploying AI to identify diagnosis gaps, prioritize patient outreach, optimize care coordination, automate administrative processes, and improve resource allocation. However, market adoption is favoring practical, explainable, and workflow-integrated AI rather than fully autonomous decision-making, making transparency, traceability, and clinician oversight critical success factors.

Growth Environment

- The PHM market continues to benefit from increasing provider participation in risk-based reimbursement models, including Medicare Advantage, MSSP, and other value-based care arrangements. As organizations assume greater financial accountability, demand is growing for platforms that can improve quality performance, optimize resource utilization, and support population-level risk management.
- Healthcare organizations are increasingly prioritizing solutions that translate insights into action. While analytics and risk stratification remain foundational, buyers are seeking platforms that embed care coordination, patient engagement, quality management, and performance improvement directly into clinical and operational workflows. This shift is accelerating demand for workflow-centric PHM platforms that support measurable outcomes rather than reporting alone.
- The growing availability of clinical, claims, pharmacy, and social determinants data is increasing the need for unified population health strategies. Organizations are seeking platforms that can activate disparate data sources to support longitudinal patient visibility, risk adjustment, attribution management, and financial performance improvement. Vendors that effectively connect and operationalize data across payer and provider ecosystems are strengthening their competitive positions.
- AI adoption within PHM is expanding beyond predictive analytics into workflow automation, intervention prioritization, diagnosis gap identification, and care orchestration. Market demand is increasingly focused on practical, explainable, and workflow-integrated AI capabilities that improve productivity and support proactive population management while maintaining clinician oversight.
- Healthcare organizations continue to rationalize fragmented technology environments and reduce reliance on multiple point solutions. As a result, demand is increasing for broader population health platforms that combine analytics, care management, patient engagement, interoperability, quality performance management, and value-based care enablement within a unified ecosystem.

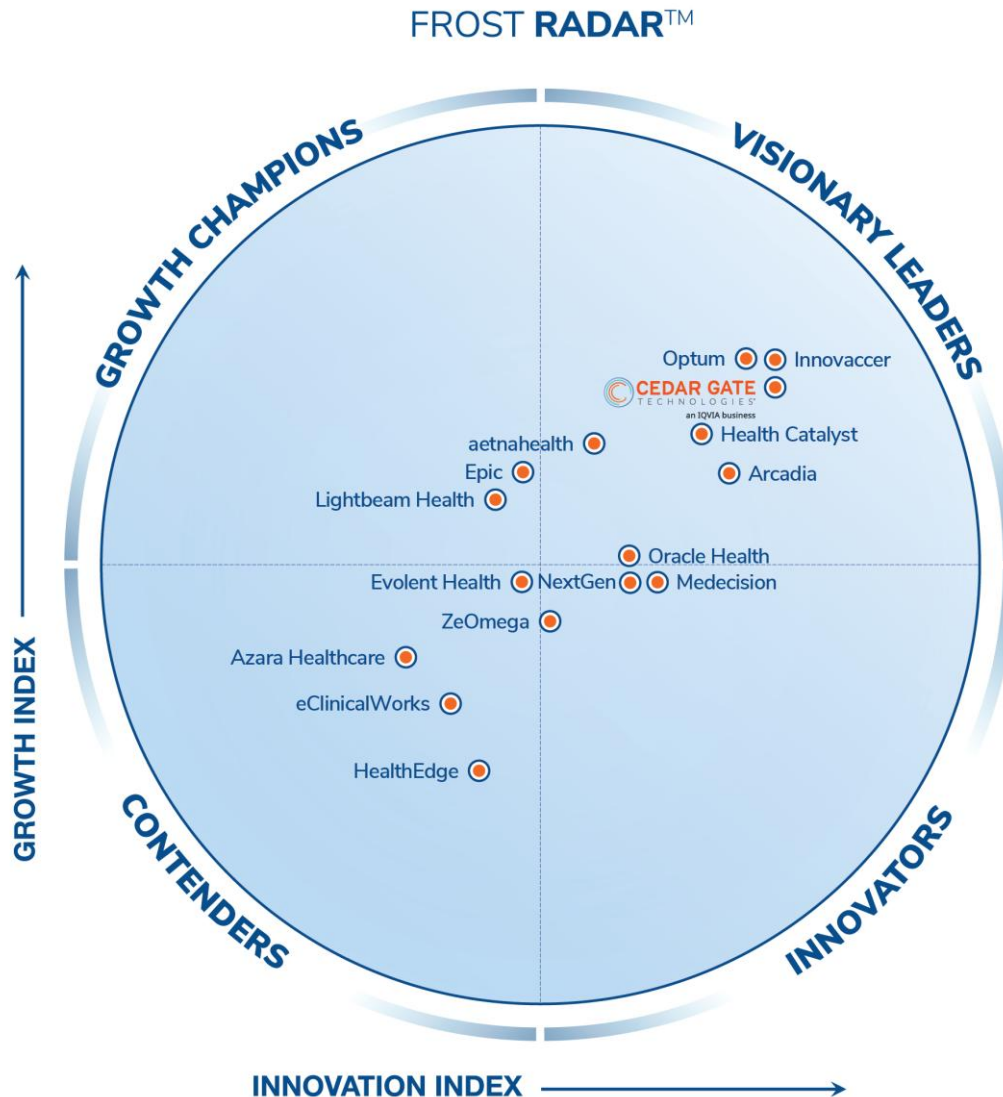
Growth Environment

- The PHM market is transitioning from a period focused primarily on data aggregation and retrospective analytics to one centered on workflow-enabled execution, financial accountability, and AI-assisted intervention management.
- Future market leaders will be defined not only by their ability to generate insights, but also by their ability to activate those insights across clinical, operational, and financial workflows while supporting increasingly complex value-based care environments. Vendors that successfully combine data convergence, workflow integration, and AI-enabled orchestration will be best positioned to capture the next phase of market growth.

Frost Radar™ US Population Health Management, 2026



Frost Radar™: US Population Health Management, 2026



In the US population health management market with 50+ qualified participants, Frost & Sullivan independently evaluated the landscape and selected just 16 companies to be benchmarked in this Frost Radar™. This small, carefully chosen group represents organizations that rise above the broader market, demonstrating not only strong growth but a clear capacity to innovate and lead. Inclusion is not simply recognition; it signals that a company is operating at the forefront of its industry.

This evaluation is led by Frost & Sullivan's experienced global analyst team, combining deep domain expertise with a rigorous, fact-based approach. Using our proprietary, multi-dimensional benchmarking methodology, applied consistently and validated by analysts, Frost & Sullivan ensures a fair, globally comparable, and defensible assessment of true market leadership.

Frost Radar™: Competitor Categories

GROWTH CHAMPIONS

- Achieve significant market growth through effective execution
- Leverage proven technologies and scalable business models
- Maintain competitiveness via operational efficiency and customer focus
- Require increased innovation investment for sustained leadership

CONTENDERS

- Emerging players with modest market presence and cautious strategies
- Often new entrants or niche participants establishing their positions
- Emphasizes continuous improvement and ensures operational reliability
- Hold potential for growth through innovation, alliances, and market expansion

VISIONARY LEADERS

- Market leaders with a strong balance of innovation and growth.
- Deliver transformative technologies, business models, and processes.
- Influence industry direction and set new benchmarks.
- Combine strategic vision with operational excellence for market dominance.

INNOVATORS

- Drive technological advancement with disruptive ideas and solutions
- Prioritize R&D, IP development, and pioneering concepts
- Strong innovation foundation with opportunities to accelerate commercialization and scale
- Benefit from strategic partnerships and targeted go-to-market strategies

Frost Radar™ Competitive Environment

- CedarGate differentiates through its integrated value-based care platform that combines clinical, financial, and operational performance management. Its ability to connect analytics, care workflows, and contract performance management positions it among the market's most comprehensive PHM vendors.

Frost Radar™ Companies to Action



VISIONARY LEADER

Cedar Gate Technologies, an IQVIA business

INNOVATION

- Cedar Gate Technologies delivers a comprehensive, end-to-end population health and value-based care platform, integrating data, analytics, care management, payment administration, and services within a unified architecture. The company's innovation is anchored in its ability to connect insights to execution and financial outcomes, positioning it as one of the most complete PHM platforms in the market.
- At the foundation of the platform is a single, enterprise-grade data lake, capable of ingesting and harmonizing more than 50 data types across claims, EHRs (80+ integrations), pharmacy, lab, SDoH, and other sources. The platform supports near real-time data ingestion and advanced data pipeline automation, enabling organizations to operate with high data fidelity and timeliness.
- This robust data layer is further enhanced through rich longitudinal datasets, market intelligence, provider network insights, and pharmacy data, significantly strengthening benchmarking, predictive modeling, and decision support capabilities.
- Cedar Gate's analytics capabilities extend beyond traditional reporting to include predictive modeling, risk stratification, and advanced benchmarking, supported by a catalog of proprietary machine learning models.
- The platform also incorporates generative and conversational AI capabilities, enabling users to interact with data dynamically and accelerate insight generation. Additionally, the introduction of AI-driven data mapping and onboarding automation improves speed-to-value and reduces implementation friction.

Cedar Gate Technologies, an IQVIA business

INNOVATION

- A key area of differentiation lies in Cedar Gate's closed-loop execution model, where insights are directly translated into action through tightly integrated workflow tools. The platform enables automated cohort identification and routing into care pathways, event and episode-based workflows, care plan automation and task orchestration, real-time alerts and intervention tracking, and integrated patient experience capabilities.
- These capabilities support both payer and provider use cases and are embedded within clinical workflows, including EHR-integrated decision support at the point of care, enabling providers to act on validated insights in real time.
- Cedar Gate further distinguishes itself through its comprehensive contract lifecycle management capabilities, spanning contract modeling and negotiation, performance monitoring and mid-cycle optimization, and settlement and reconciliation. This financial layer is tightly integrated with analytics and care workflows, enabling organizations to align clinical interventions with financial performance.
- Another critical innovation is the platform's impact tracking module, which allows organizations to measure the effectiveness of interventions and quantify ROI through cohort-based comparisons and program evaluation. This capability directly addresses growing market demand for measurable outcomes and contract-level performance validation.
- Finally, Cedar Gate's integrated payment administration capabilities, including bundled payments and capitation management, provide a unique ability to influence provider behavior through aligned incentives—an area where most PHM vendors lack depth.

Cedar Gate Technologies, an IQVIA business (continued)

GROWTH

- Cedar Gate has established a strong growth trajectory driven by increasing demand for end-to-end value-based care platforms that can support both clinical and financial performance. The company serves a diverse customer base across payers, providers, and self-insured organizations, with a demonstrated ability to support large-scale, complex deployments managing up to 18 million lives.
- The company's growth is underpinned by its ability to address the full spectrum of value-based care needs, from data integration and analytics to care execution and payment administration. This breadth enables Cedar Gate to position itself as a strategic partner rather than a point solution vendor, particularly for organizations managing multiple contracts and transitioning to downside risk models.
- Cedar Gate is entering a new phase of growth, expanding its reach into government and public sector programs, pharma and life sciences ecosystems, and broader provider and network intelligence use cases. These areas represent meaningful extensions of the company's core capabilities and open new avenues for impact and scale.
- Additionally, new proprietary data assets, patient support and engagement functionality, and AI capabilities are enhancing its ability to deliver differentiated predictive insights, stronger payer-provider-patient alignment, as well as assistive and agentic AI tools, further strengthening its competitive positioning.
- Cedar Gate is also benefiting from increased market demand for contract performance management, cost containment, and utilization optimization, AI-driven workflow automation, and readiness for evolving CMS models and alternative payment structures.

Cedar Gate Technologies, an IQVIA business (continued)

GROWTH

- Its strong alignment with alternative payment models (bundles, capitation, shared savings), along with new digital marketing capabilities to support business growth strategies, further supports its growth, as organizations increasingly seek platforms to manage the full contract lifecycle.

Cedar Gate Technologies, an IQVIA business (continued)

FROST PERSPECTIVE

- Cedar Gate Technologies stands out as a leading, execution-focused PHM platform, uniquely integrating data, analytics, care workflows, and payment administration to drive measurable clinical and financial outcomes.
- To strengthen its competitive edge, the company must elevate market visibility and sharpen its provider-facing narrative, ensuring deeper adoption at the point of care. Leveraging new data assets and the AI ecosystem, Cedar Gate has a clear opportunity to reinforce its position as a data-driven, value-based performance leader, particularly in benchmarking, predictive intelligence, and contract optimization.
- With strong alignment to next-generation value-based care models, Cedar Gate is well-positioned to sustain leadership, provided it amplifies its differentiation and scales market presence effectively.

Best Practices & Growth Opportunities



Best Practices

1

Prioritize Workflow Integration Over Standalone Functionality

2

Build a Unified Data Foundation Across Clinical, Claims, and Financial Sources

3

Focus on actionable and explainable AI

Growth Opportunities

1

Expand Beyond Analytics into Workflow-Oriented Population Health Execution

2

Capitalize on Growing Demand for Financial Performance and Risk Management

3

Leverage AI to enable proactive intervention and care orchestration

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 three 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

Innovation Index

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

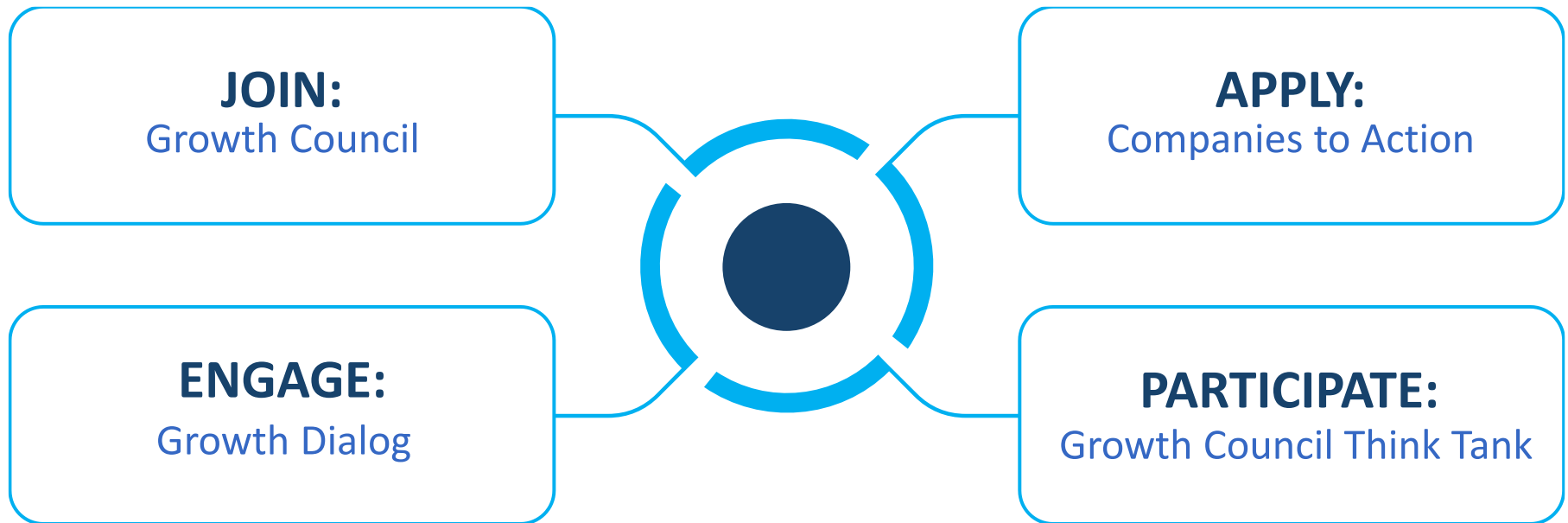
II4**MEGATRENDS LEVERAGE**

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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