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- **Healthcare IT services: the outlook for 2017**
- **2016 in review: healthcare IT services**
- **The WITCH group: commentary on financials and market position**
- **Other healthcare IT services companies: brief updates**

Healthcare markets: high levels of change, uncertainty



- New Trump administration policies will impact healthcare
 - ✓ ACA repeal, uncertainty in exchange and Medicaid market
 - ✓ Immigration policy reform and review of the H1B visa program to impact global firms
 - ✓ Increased competition: Insurance mega-mergers denied, pharma pricing under scrutiny
- Transition to value-based care expected to continue
 - ✓ Healthcare consumerism will drive increased focus on patient experience
 - ✓ Digital health initiatives will gain grounds driven by consumer health apps and IoT
 - ✓ AI and cognitive will drive population health management
- IT will embrace new technologies, grapple with old problems
 - ✓ Cloud adoption, automation will increase – driving operational efficiencies
 - ✓ Interoperability will remain a challenge in unlocking the value of patient data
 - ✓ IT security will be a top issue: data breaches and ransomware expected to be big threats

Our first annual survey: the outlook for healthcare IT services in 2017



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- Over 90% of the respondents indicate they will increase investments in healthcare IT in 2017
- The top three areas for growth are digital transformation, analytics, and cloud
- The outcome of the Presidential election is by far the biggest concern for the macro-level demand environment, followed by concerns about IT spend levels
- Cyber security and data privacy concerns will be the biggest obstacles for top-line growth for healthcare IT spend, along with a reduction in IT spend
- Pricing pressure (64.5%) and rise of non-traditional players such as Amazon Web Services (AWS) (58.06%) are the key factors that will impact the competitive healthcare environment in 2017
- In healthcare IT, deal conversion (35.5%) and demand generation (35.5%) appear to be the biggest challenges in achieving growth objectives
- The primary decision-maker for IT services continues to be the CIO

Highlights for 2016: softening growth, headwinds for traditional outsourcing



- Healthcare is in the midst of digital transformation and a shift to value-based care (VBC)
- Besides five traditional players (Wipro, Infosys, TCS, Cognizant, and HCL) covered in detail in this report, a host of large incumbents like IBM, Accenture, Deloitte, and Dell Services (now NTT), are aggressively pursuing growth in healthcare
- Non-traditional players such as AWS, digital health startups, and mid-tier companies with a strategic approach to healthcare are redefining healthcare IT services market
- Cognizant is the leader of the pack, though HCL had a remarkable series of wins this year
- Healthcare leadership changes at Infosys, Wipro, and Dell Services-NTT

Highlights for 2016: softening growth, headwinds for traditional outsourcing (cont.)



- M&A has picked up significantly – large deals included Wipro/HPS and Dell Services/NTT. Cognizant’s 2014 acquisition of TriZetto is expected to drive the company’s growth
- Big IT services firms sitting on cash reserves are facing investor pressure to return some of the cash; Cognizant has announced share buyback plans
- The Trump administration’s intent to repeal the ACA has created uncertainty for the health insurance industry
- The new administration is looking at a review of H1B visas and immigration that could impact Indian IT firms. Media coverage on job losses from the UC San Francisco (UCSF) and Health Care Service Corporation (HCSC) deals are headwinds for traditional outsourcing

The WITCH group: healthcare financials

- The growth % of Wipro and HCL in healthcare is higher than that of the company as a whole. Wipro growth is due to recent acquisitions
- The HPS acquisition has impacted Wipro's margin, down ~20% to ~15%. Outlook for HPS uncertain due to reliance on ACA exchange markets
- CTS has stated they will consciously exit low margin businesses this year

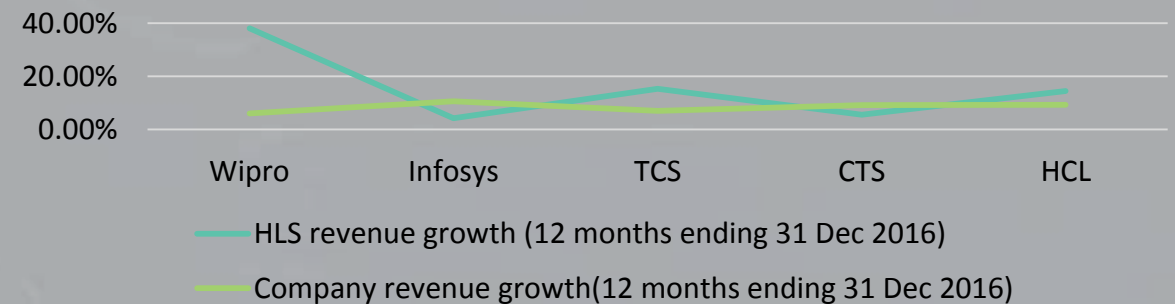
Results for 12 months period ending Dec 31, 2016	Total revenue (in USD MM)	HLS revenue (in USD MM)	Healthcare % revenue	HLS operating margin	HLS revenue growth	Company revenue growth
Wipro	7632	1156	15.14%	16.19%	44.05%	10.73%
Infosys	10085	1276	12.65%	28.12%	10.85%	9.45%
TCS	17330	1283	7.40%	N.A	13.14%	6.73%
CTS	13487	3871	28.70%	30.68%*	5.50%	8.60%
HCL **	6745	835	12.38%	N.A	13.88%	9.87%

* Segment wise margin not available for 4th quarter.

** HCL reporting cycles different from others in group



Revenue growth % comparison



Revenue guidance and outlook trends

Firm	April 2016 FY17 revenue guidance	July 2016 revised revenue guidance	Sep 2016 revised revenue guidance	Dec 2016 revised revenue guidance	Outlook going forward
Wipro	1-3%	At best 1%	Overall growth of 2%	1%-2%	The company is concerned about HPS acquisition. HPS addresses exchange markets, and as such, repeal of the ACA may impact revenues and put acquisition ROI at risk
Infosys	11.8%- 13.8%	10.8%-12.3%	8% -9%	8.4%-8.8%	Expects a good next quarter for healthcare and insurance (revenue break-up between these two segments not available)
TCS	No guidance	No guidance	No guidance	No guidance	Margins have inched up higher though segment-wise break-up is not available
CTS	10%-13%	8.5%-9.5%	8.5%-9%	8%-10%	The company plans to start returning 75% of free cash flow, starting 2017, while exiting low margin businesses and focusing on digital
HCL	11.2%-13.2%	11.2%-13.2%	12%-14%	12-14%	Momentum from 2016 wins, especially in ITO deals, will carry forward into 2017

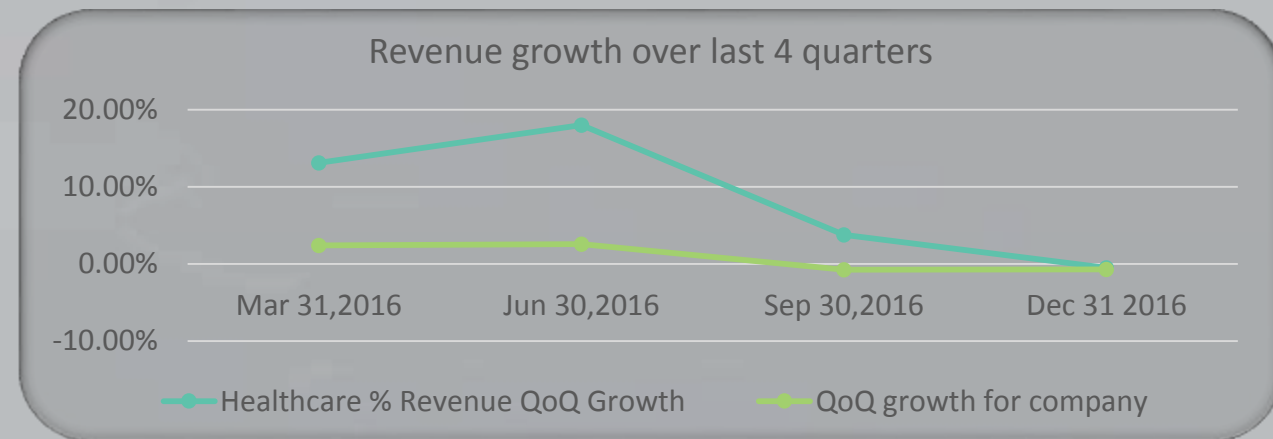
Wipro: 2016 performance and highlights

Performance highlights

- Healthcare margin at 16.21% is a slight improvement over 15.49% during the previous quarter, but it is lower than company margin (17.8%) and lowest among all business segments. HPS acquisition has impacted the margin (reduction of more than 545 bps same period last year)
- The repeal of ACA may be the 'biggest risk' to the healthcare business. The company is looking to repurpose HPS value prop and platform to markets other than healthcare
- The company has provided a guidance of 'muted growth,' partly due to uncertainty around HPS' prospects

Results for period ending Dec 31 2016	Total revenue (in USD MM)	HLS revenue (in USD MM)	Healthcare % revenue	HLS operating margin	Healthcare % revenue QoQ growth	QoQ growth for company
Mar 31, 2016	1882	250	13.28%	18.75%	13.12%	2.39%
Jun 30, 2016	1931	295	15.28%	14.33%	18.02%	2.59%
Sep 30, 2016	1916	307	16.02%	15.49%	3.79%	(.75%)
Dec 31, 2016	1903	304	16.00%	16.21%	(0.50%)	(0.70%)

Operating margins: Company and HLS



HPS acquisition is the single biggest factor in Healthcare and Life Sciences (HLS) performance

Wipro: 2016 company highlights



- Started the year with leadership changes:
 - CEO T.K. Kurien appointed Executive Vice Chairman
 - Abidali Z Neemuchwala appointed CEO and member of the board
 - Jeff Heenan-Jalil appointed Sr. Vice President and Global Head of HLS
- Expanded board to include Patrick Dupuis and Dr. Patrick J. Ennis
- Signed an agreement to acquire 100% of shares in Tampa, Fla. based HealthPlan Services (HPS) from Water Street Healthcare Partners. This deal is worth \$460 million. HPS offers technology platforms and fully integrated BPaaS solution to health insurance companies in international, group, and ancillary markets. Wipro expects to be a leader in administrative services in US healthcare insurance with this deal
- In Q4, Wipro signed a definitive agreement to acquire Appirio, a global cloud services company for \$500 Million
- In partnership with Swinburne to pioneer digital innovation
- Wipro to pay \$5 Million civil money penalty to close a six-year-old US SEC embezzlement investigation.



- Announced three new client wins during the year – a global pharmaceutical, US-based pharmaceutical, and a global healthcare major
 - Multi-year engagement with a large US-based pharmaceutical company to design and implement customized end-to-end procure-to-pay services by reimagining their customers' digital purchasing experience. Will deploy robotic process automation (RPA) using HOLMES platform to reduce manual intervention and enable bot-assisted self-help functionalities for a superior user experience
 - Media reports indicated that Abbot Labs laid off more than 150 IT employees in an outsourcing transaction with Wipro

Infosys: 2016 Performance and Highlights

Performance highlights

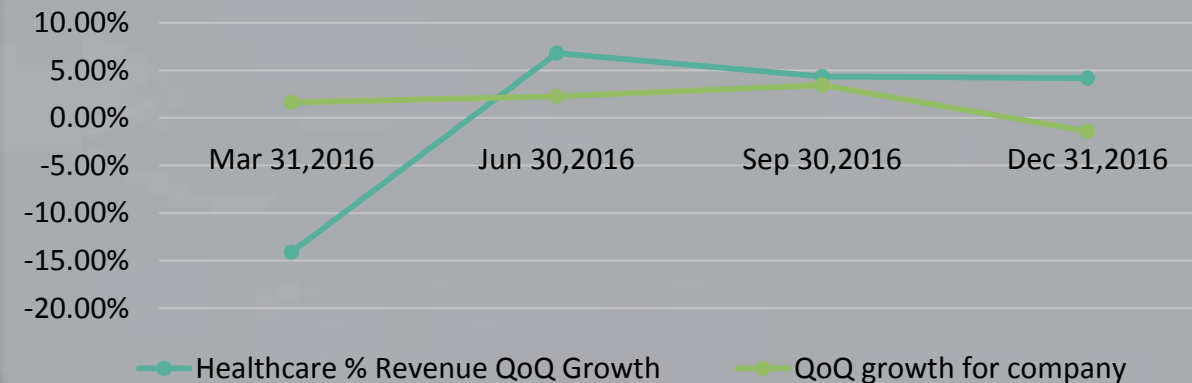
- The negative QoQ growth in the quarter ending March 2016 is more due to the addition of a business segment “Hi-Tech.” Some of the revenue, earlier classified as healthcare, is now reclassified under “Hi-Tech”
- Healthcare and insurance did better than overall company during the 2nd quarter of 2017, and the firm believes that it will continue to do well
- Significant improvement in operating margin with an increase of 232 bps

Steady growth expected in healthcare, revenue visibility not available due to combined reporting of HLS and Insurance

Results for period ending Dec 31 2016	Total revenue (in USD MM)	HLS revenue (in USD MM)	Healthcare % revenue	HLS operating margin	Healthcare % revenue QoQ growth	QoQ growth for company
Mar 31, 2016	2446	280	11.45%	30.29%	(14.11%)	1.62%
Jun 30, 2016	2501	299	11.95%	26.09%	6.79%	2.25%
Sep 30, 2016	2587	312	12.06%	26.60%	4.35%	3.44%
Dec 31, 2016	2551	325	12.74%	28.92%	4.17%	(1.39%)

Operating margins: Company and HLS

Revenue growth over last 4 quarters



Infosys: 2016 company highlights



- Launched major global strategic initiatives during the year:
 - Global strategic initiatives with AWS to make transitioning to the cloud easier and faster
 - Collaboration with Microsoft Corp to deploy advanced analytics solutions to support healthcare organizations in their digital transformation, using offerings such as Cortana Analytics Suite and SQL Server 2016
 - In a global partnership with MongoDB the database for giant ideas marching toward next generation solutions
- In the wake of a disappointing Q2, undertakes a major revamp by splitting the business into smaller units. CEO Vishal Sikka indicates that breaking the company into more autonomous units, with profit and loss (P&L) responsibilities, will enable scalability, freedom of operation, and accountability. These smaller units will be handled by the “next generation of management”



- Healthcare leader Manish Tandon departs in Q3 reorg. Sangita Singh, former head of healthcare at Wipro, joins as head of HLS business unit
- Newspaper reports indicate loss of major deal with Pfizer impacting its April-June performance
- Reclassifies its portfolio to combine the Insurance and HLS verticals
- Announces several strategic investments:
 - Trifacta - a data analytics provider
 - TidalScale a pioneer in software defined servers that deals with big data solutions
 - UNSILO a Danish artificial intelligence startup focused on advanced text analysis

- N.A

TCS: 2016 performance and highlights

Performance highlights

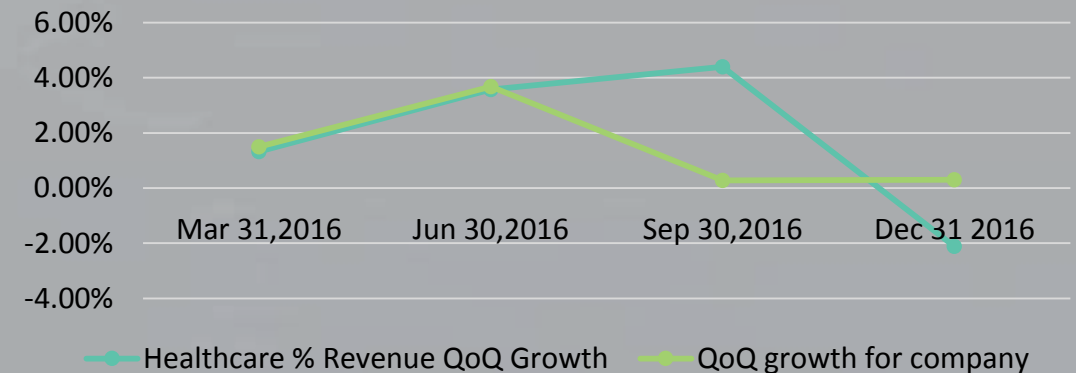
- The share of digital revenue has increased 52.2% YoY. It constitutes 13.8% of total revenue. Healthcare generated 15% of its revenue from digital
- Healthcare business growth has been soft in Q4

**Steady organic growth at company level,
impact of recent CEO change yet to emerge**

Results for period ending	Total revenue (in USD MM)	HLS revenue (in USD MM)	Healthcare % revenue	HLS operating margin	Healthcare % revenue QoQ growth	QoQ growth for company
Mar 31, 2016	4207	307	7.30%	N.A	1.32%	1.50%
Jun 30, 2016	4362	318	7.30%	N.A	3.58%	3.68%
Sep 30, 2016	4374	332	7.60%	N.A	4.40%	0.28%
Dec 31, 2016	4387	325	7.40%	N.A	(2.11%)	0.30%

Operating margins: Company and HLS

Revenue growth over last 4 quarters



TCS: 2016 company highlights



- Fined \$940 million by U.S Federal jury in the Epic Systems Corporation case for IP infringement. Amount reduced by \$220 million to be compliant with Wisconsin law
- Partners with GE Health Cloud to create an innovative 'Industry Solutions Ecosystem' to enrich GE's Predix platform
- Rajesh Gopinathan becomes new CEO for TCS (early 2017). Former CEO N Chandrasekaran named Chairman of holding company Tata Sons



- Deployed digital solutions over the cloud to enable doctors at the Royal College of Physicians of Ireland (RCPI)
- Consulting engagement with a North American healthcare provider to deploy TCS iON digital learning platform
- Working with a leading North American biopharmaceutical firm to help improve throughput of their new molecule pipeline
- Working with a North American pharmaceutical company on big data project for analyzing supplier distribution process
- Working with a European pharmaceutical company to develop an app for instant analysis of patients' vital signs
- Chosen by a UK based pharmaceutical company to create roadmap and architecture for its R&D unit using MDM, big data
- Selected by a European pharmaceutical company to revamp user experience and design of its unified portal
- Engaged with a US-based large health insurer to manage maintenance and production operations for various applications
- European multinational pharmaceutical company to empower employees digitally as a part of workplace initiative

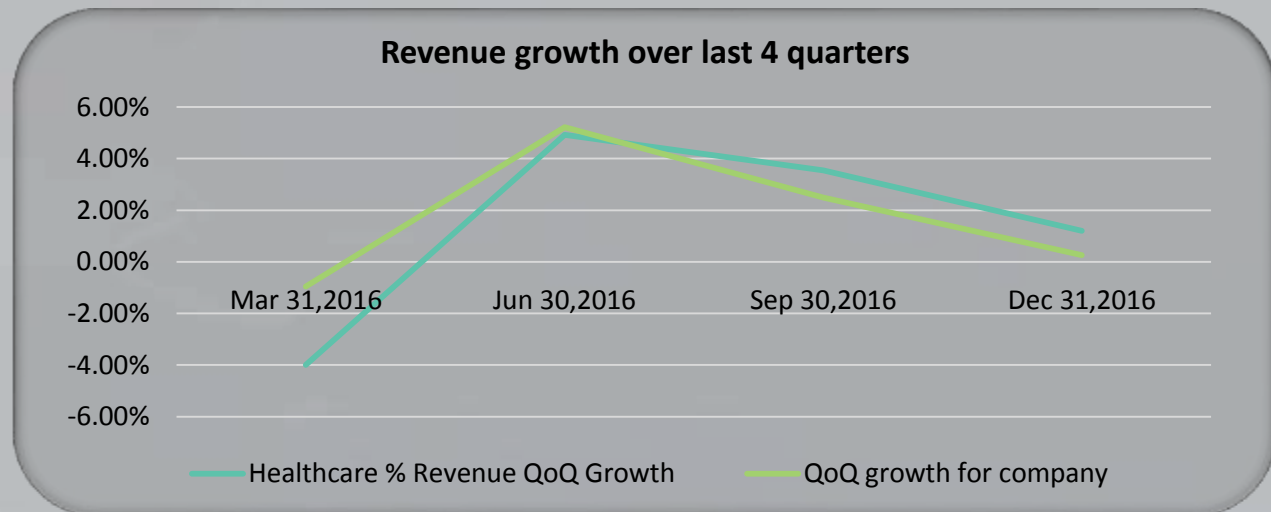
CTS: 2016 performance and highlights

Performance highlights

- Revenue growth was negative at the start of the year. However, it returned to positive growth over the last two quarters. Healthcare growth seems to be tracking the overall growth of the company
- Operating margin for healthcare decreased by more than 500 bps during the second quarter in 2016 compared to same period last year. The margin dipped this year due to a one-time write-off on a fixed contract. The margin is moving up again
- The company has agreed to appoint three directors and return \$3.4 billion to shareholders due to pressure from activist investor Elliott Management. The company is focused on improving revenue from digital and operating margins significantly

Results for period ending	Total revenue (in USD MM)	HLS revenue (in USD MM)	Healthcare % revenue	HLS operating margin	Healthcare % revenue QoQ growth	QoQ growth for company
Mar 31, 2016	3202	914	28.54%	32.28%	(4.00%)	(.96%)
Jun 30, 2016	3369	959	28.47%	28.15%	4.92%	5.22%
Sep 30, 2016	3453	993	28.76%	31.62%	3.55%	2.49%
Dec 31, 2016	3462	1005	28.70%	N.A	1.20%	.26%

Operating margins: Company and HLS



Clear leader in healthcare among its peers with substantial margins



- Continues to be the dominant player with almost 30% of company revenues coming from the healthcare business
- Continues to bet big on TriZetto to drive growth. Since TriZetto's acquisition in late 2014, CTS has signed several large platform based deals where the contract value is approaching \$2 billion (including Emblem Health)
 - Developing a technology solution named Cognizant Health TranZform, which aggregates data from multiple systems, including Cognizant's TriZetto payer core administration platforms, physician practice management systems, EHRs and other healthcare databases
 - The solution is being developed with technology from Orion Healthcare



- Investing heavily in digital
 - Exclusive strategic partnership and acquisition of an ownership interest of 49 percent in ReD Associates
 - Acquisition of Idea Couture, a global firm offering a broad range of digital innovation, strategy, design technology services
 - Partnership with Box to help enterprises transform the way they work with Box Platform
- In October, Cognizant disclosed an internal inquiry into improper payments of \$6 Million related to its real estate facilities in India resulting in the abrupt departure of President Gordon Coburn. Rajeev Mehta replaces Coburn as President of CTS
- CTS under pressure from activist investor Elliott Management, to replace three members of its board and return \$3.4 billion to shareholders



- Announces deal with Kern Health Systems (KHS), a managed care health plan serving more than 220,000 members in California, to modernize and transform its technology infrastructure, using TriZetto software
- California-based Santa Clara Family Health Plan (SCFHP), selects Cognizant's TriZetto software solutions to support the overall administration of its business operations on a single, modern healthcare platform

HCL: 2016 performance and highlights

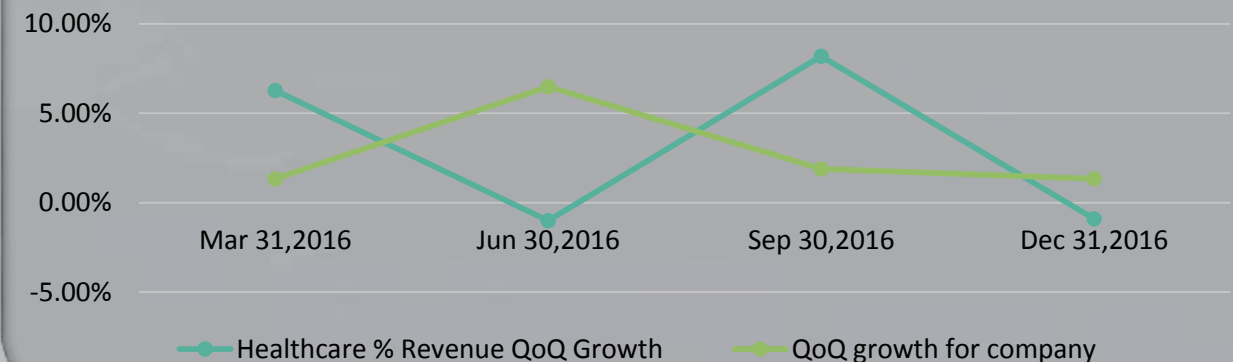
Performance highlights

- The growth of healthcare revenue has been erratic over the past four quarters
- It had a negative growth in the most recent quarter, but all its recent wins have been in new technologies including digital, IoT and cloud

Growth is better than most peers, but erratic over the quarters

Results for period ending Dec 31 2016	Total revenue (in USD MM)	HLS revenue (in USD MM)	Healthcare % revenue	HLS operating margin	Healthcare % revenue QoQ growth	QoQ growth for company
Mar 31,2016	1587	203	12.80%	N.A	6.28%	1.34%
Jun 30,2016	1690	201	11.89%	N.A	(1.00%)	6.49%
Sep 30,2016	1722	217	12.60%	N.A	8.20%	1.89%
Dec 31,2016	1745	215	12.40%	N.A	(0.90%)	1.34%

Revenue growth over last 4 quarters



HCL: 2016 company highlights



- Announces launch of IoT Incubation Center in Redmond, Washington, where they will build vertical solutions focused on two key growth areas – Industrial and Manufacturing, and Life Sciences and Healthcare (Remote patient monitoring)
- Acquires Geometric to strengthen engineering services business
- C. Vijayakumar appointed as the President and Chief Executive Officer of the company in Q3

HCL: 2016 customer win announcements



- \$50 million deal with UCSF with project spanning across UC system drew attention due to the job losses at UCSF related to the deal
- IT infrastructure outsourcing deal with HCSC, an insurance firm that operates Blue Cross and Blue Shield plans, is expected to displace over 500 jobs at HCSC
- Chosen by a leading American diabetic care medical devices and solutions provider to transform, build, host, migrate, and operate greenfield IT infrastructure as well as applications migration and transformation
- Next-Gen IT operations for the North American of a Global 2000 Japanese pharmaceutical major
- For a leading US-based healthcare solution provider, HCL became the sole outsourcing partner for the end-to-end management of their healthcare provisioning platform for Application and Business Process Services



- A Fortune 200 pharmaceutical company chose HCL for Delivering Application Services
- HCL signed a digital web platform transformation and services contract with a leading global pharmaceuticals company in the DACH region to drive innovation and customer experience
- A Fortune 500 US-based pharmaceutical company engaged HCL to implement an end-to-end medical IoT solution consisting of medical devices, mobile applications, and back-end applications, hosted on AWS cloud. The solution will help patients who suffer from eye diseases
- A leading US-based healthcare IT solutions company augmented its relationship with HCL to extend legacy product support for its healthcare practice management products and for the migration of healthcare products into Azure Cloud to drive efficiencies and innovation

2016 highlights: other key players in healthcare IT services

- Accenture
- Atos
- Capgemini
- CitiusTech
- Dell-NTT
- Deloitte
- Infogain
- Mphasis
- Persistent Systems
- Sutherland Global Services
- TechMahindra
- VirtusaPolaris

2016 highlights: other key players in healthcare IT services (cont.)

Accenture

- Annual results for the period ending Aug 31 indicated a double-digit growth in healthcare business and a record year all around
- To hire 100,000 people in FY16 and spend \$1 billion on acquisitions, as it invests in new technologies, digital, cloud and cyber security, which contributes \$10 billion to its top-line. The investments and hires are creating a dramatic gap between Accenture and its Indian IT competitors, with its current 36,000 strong digital workforce
- Accenture Federal Services enters into a two-year consulting agreement with ONC to help government agencies create a framework to collect, analyze, and leverage the Patient Generated Health Data (PGHD). Won a two-year consulting agreement with ONC to help government agencies create a framework to collect, analyze, and leverage the PGHD
- Accenture Life Sciences Cloud for R&D, a platform to collect, share, and analyze clinical data, is being used by seven top pharma companies including Pfizer, Merck, GSK, and Lilly to accelerate drug development and improve patient outcome
- Accenture Interactive in Japan completed its acquisition of a majority stake in IMJ, a full-service digital agency
- Accenture and GE Healthcare introduced a new offering to help improve medical claims processing and related cash flow for healthcare providers. The alliance targets medical claims management, one of the largest areas of lost revenue estimated at \$2 billion in the U.S. healthcare system
- Accenture integrated its Intelligent Patient Platform with Salesforce Health Cloud, giving life science and healthcare providers the ability to deliver a personalized patient experience

2016 highlights: other key players in healthcare IT services (cont.)

Atos

- French company Atos acquires Anthelio. Along with the earlier acquisition of Xerox's services business, which contributed \$250 Million in healthcare revenues, Anthelio's \$200 Million in healthcare revenues puts Atos in the tier 1 category of healthcare IT services firms in the U.S

Capgemini

- As a GE Health Cloud Partner, it will leverage its business and digital expertise for its work on Predix to provide consulting and end-to-end solutions on the GE Health Cloud

CitiusTech

- Partners with Orion Health along with The Keystone Health Information Exchange (KeyHIE®), a network of more than 400 healthcare facilities in 53 counties of Pennsylvania
- Appointed Dr. Mohit Kaushal to the company's board of directors. He currently serves as a special advisor at General Atlantic and is a well-recognized healthcare professional
- Partners with VitreosHealth leader in predictive and prescriptive health for population health management

2016 highlights: other key players in healthcare IT services (cont.)

Dell-NTT

- Dell's IT consulting division Perot Systems, sold to NTT Data for over \$3 Billion. The new NTT DATA Services will leverage more than 30 years of experience to deliver outcome-based business and IT solutions
- Dan Allison joins as the Head of the Healthcare and Life Sciences Division reporting to John McCain, CEO of NTT DATA
- Announces IT outsourcing deals with Dubai Health Authority, Blue Cross & Blue Shield of Rhode Island, Harvard Pilgrim Healthcare, and Baystate

Deloitte

- Deloitte will develop blockchain for healthcare which has the potential to revolutionize EHR interoperability and exchange of healthcare big data
- In an anonymous online survey conducted by Deloitte involving 308 blockchain knowledgeable senior executives with \$500 million or more in annual revenue, it concluded that Healthcare and Lifesciences (35% of respondents plan to implement blockchain in 2017) plan the most aggressive deployment of this technology in 2017
- Teamed up with Vandrico Solutions, a Vancouver-based software company, to help manage and develop world's largest wearable technology databases

2016 highlights: other key players in healthcare IT services (cont.)

Infogain

- The company completes the acquisition of Blue Star Infotech's IT operations. Sunil Bhatia named CEO. Former CEO Kapil Nanda remains an active part of the company as full-time Executive Chairman of Board of Directors

Perficient

- Perficient adds new customer relationships and follow-on projects with leading healthcare companies such as Cedars-Sinai Medical Center, Mayo Clinic, Moffitt Cancer Center and Research Institute, and Trinity Health, apart from others outside the healthcare area

Persistent Systems

- Persistent Systems partners with Salesforce to help implement and extend telehealth capabilities in the Health Cloud
- Acquires Australia's PRM Cloud Solutions Pty Ltd. PRM is a cloud application development firm and partner of US-based Salesforce.com
- Jacqueline White appointed Chief Customer Officer and is responsible for all aspects of customer satisfaction and success

2016 highlights: other key players in healthcare IT services (cont.)

Sutherland Global Services

- Announces the successful implementation of digital health platform to drive population health and quality improvement initiatives for Atlanta-based Morehouse Choice Accountable Care Organization and Education System and the Choice Health Care Network IPA
- Acquires big data analytics firm Nuevora, a leading top 10 big data analytics firm

Tech Mahindra

- In a race along with TCS and HCL, Tech Mahindra to buy a controlling stake in the HCI group

VirtusaPolaris

- Virtusa completes the acquisition of 51.7% of the fully diluted outstanding shares of Polaris Consulting and Services forming VirtusaPolaris, their new market-facing brand

Report authors: the WITCH doctors



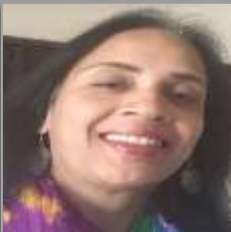
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Technology Growth Strategy advisory, digital marketing and content Solutions, market intelligence and research

Founding Principal has over 18 years in healthcare IT, including leadership stints in Accenture, Wipro, and Silicon Valley startups

Thought leadership and deep market knowledge: In house research, publications in industry journals, speaking engagements at leading industry conferences

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