

Magic Quadrant for Healthcare Provider Industry Cloud Platforms

27 July 2026 - ID G00844429 - 40 min read

By Andrew Meyer, Allison Dennis

CIOs can adopt healthcare provider industry cloud platforms to enable industry-specific outcomes that address enterprise mission-critical priorities. This research helps CIOs advance their platform strategy through understanding the capabilities of HP-ICP vendors and identifying their strengths and cautions.

Strategic Planning Assumption

By 2031, more than 50% of healthcare provider (HP) organizations will adopt modular, composable industry cloud platforms (ICPs) to compose and orchestrate new digital experiences, shifting investment away from traditional, monolithic systems.

Market Definition/Description

Gartner defines healthcare provider industry cloud platforms (HP-ICP) as software and services that enable organizations to compose, orchestrate and automate clinical and business capabilities. HP-ICPs can support a broad range of industry use cases, including clinical workflow and decision support, patient engagement, operational excellence, data activation, and automation. These solutions enable organizations to deliver personalized digital experiences for patients and clinicians, unify complex healthcare datasets for analytics and research, and develop custom applications to meet evolving healthcare needs.

The business purpose of the HP-ICP is to enable healthcare provider organizations to innovate by liberating siloed data across a range of transactional record systems such as the electronic health record (EHR), labs, imaging and departmental systems, and business and clinical applications. It addresses some of the key challenges healthcare CIOs face, including:

- Changing consumer expectations that require a shift in business and operating model to fulfill healthcare access, quality and overall experience (e.g., to develop a digital front door)
- New ecosystem dynamics that require new healthcare orchestration and information sharing across health and care agencies (e.g., participating in a shared digital care record across health organizations)
- Cost optimization needs to address the continued pressure to recover and innovate while also facing reduced revenue (e.g., creating a research environment to help improve clinical pathway quality and efficiency)
- A need to repurpose legacy IT and data while scaling new digital capabilities to meet business demands

This market definition is grounded in modern cloud services, leveraging IaaS, PaaS, SaaS, that provide scalable infrastructure, advanced platform capabilities and modular healthcare applications to enable rapid innovation and the composition of new healthcare experiences.

Mandatory Features

- An **integrated data fabric layer** is a foundational capability that enables providers to connect to, extract and transform a broad range of underlying operational application data sources (e.g., EHR) and data types (e.g., both structured and unstructured data). Its aim is to provide flexible, reusable and augmented data pipelines and services that represent industry-specific concepts and semantics.
- A **packaged business capability (PBC) layer** that provides a range of modular, autonomous and discoverable building blocks intended to be assembled into new clinician-facing or patient-facing research and operational applications, or integrated into existing workflows and systems via APIs and event interfaces. The PBCs will be curated through application marketplaces.
- A **composition layer** that supports the rapid development of new and improved digital experiences for end users. This will comprise composition tools such as low-code

development and agentic AI orchestration tools to speed delivery of new clinician- or patient-facing experiences.

Optional Features

- Graph database to support data discovery
- Metadata management capabilities
- Artificial intelligence capabilities (e.g., support for agentic AI, MCP, best-in-breed LLMs)
- Low-code tools for composition
- Healthcare templates
- Healthcare data conversion tools

Magic Quadrant

Figure 1: Magic Quadrant for Healthcare Provider Industry Cloud Platforms





Gartner

Vendor Strengths and Cautions

Alcidion

Alcidion is a Niche Player in this Magic Quadrant. Its Miya Precision platform provides a Fast Healthcare Interoperability Resources (FHIR)-native event data fabric, a modular electronic patient record/electronic health record (EPR/EHR), modular patient flow capabilities, and a visual low-code configurator. These products consolidate real-time data from legacy systems, digitize clinical and operational workflows, and provide a FHIR-native foundation for AI across the care continuum.

Alcidion is headquartered in Australia with geographically diversified operations and an established presence in Australia, New Zealand, and the U.K., alongside active expansion into

Canada and the Middle East. Its clients are enterprise-scale healthcare providers, including hospital networks, integrated care systems, and community and mental health trusts.

Strengths

- **Offering (product) strategy:** Alcidion's Miya Precision platform uses a FHIR-native data architecture to integrate and normalize data from fragmented legacy systems. This streamlines data management for clients and improves interoperability across their healthcare environments.
- **Innovation:** Alcidion's Miya Precision features a regulatory-certified Concept Detection AI engine that evaluates free-text clinical notes in real time to extract SNOMED CT concepts and is formally registered as a Class I Software as a Medical Device. This supports clinical documentation accuracy and compliance.
- **Vertical/industry strategy:** Alcidion shows market viability through its exclusive focus on healthcare providers and its intelligent workflow orchestration tools. These independently validated tools reduce length of stay, improve bed allocation times, and create operational efficiencies in patient throughput and capacity management challenges.

Cautions

- **Product/service:** While Alcidion has a strong vision for agentic AI, its primary agentic assistant Miya Insight is currently in beta as a future roadmap priority. This may limit immediate access to advanced clinical AI capabilities for clients seeking immediate out-of-the-box deployments.
- **Sales strategy:** Alcidion experiences lengthy sales cycles for new platform deployments, typically spanning 12 to 24 months in its core markets. Because Miya Precision is a novel platform category for many buyers, client procurement processes can be prolonged due to extended multistakeholder governance approvals.
- **Market understanding:** Alcidion faces significant competition from vendors modernizing their clinical platforms as well as "attentional disruption" caused by large language model (LLM) vendors entering the market. Despite demonstrated value, these dynamics may slow client adoption of proven platforms like Miya Precision.

Amazon Web Services

Amazon Web Services (AWS) is a Leader in this Magic Quadrant. Its AWS for Healthcare & Life Sciences solutions include AWS HealthLake, Amazon Connect Health, and associated AWS HP-ICP products. These products provide a comprehensive, FHIR-native healthcare data fabric and agentic AI platform, enabling organizations to unify multimodal data, automate clinical and administrative workflows, and build custom AI applications.

AWS is headquartered in the U.S. with geographically diversified operations across North America, Latin America, Europe, Africa, the Middle East, and Asia/Pacific. Its clients range from digital health startups to global enterprise health systems, including the healthcare provider, payer, public sector, and life sciences sectors.

Strengths

- **Offering (product) strategy:** AWS has a globally compliant, reliable cloud infrastructure. It uses AWS HealthLake, a comprehensive data fabric that unifies petabyte-scale, multimodal healthcare data natively into FHIR standards. This enables clients to seamlessly integrate and manage complex healthcare data across their organization.
- **Innovation:** AWS delivers advanced, purpose-built AI orchestration through Amazon Connect Health, deploying multiple autonomous agents to handle complex administrative and clinical workflows with built-in healthcare guardrails. Clients benefit from streamlined operations and enhanced workflow automation tailored to healthcare needs.
- **Business model:** AWS offers an expansive healthcare marketplace with more than 700 curated solutions, alongside robust developer tools like Amazon Bedrock for building custom AI applications. This empowers clients with flexibility to innovate and scale solutions that meet their unique requirements.

Cautions

- **Product/service:** While AWS HealthLake natively ingests FHIR, it primarily relies on partners to transform legacy formats like HL7v2 and claims. Although the platform's native mapping capabilities are expanding, managing highly heterogeneous environments today still requires multivendor integration, which can increase implementation complexity and total cost of ownership (TCO).
- **Customer experience:** To maximize application continuity and mitigate the rare but potential impact of regional cloud disruptions (such as recent DNS issues in US-East-1), healthcare organizations are encouraged to adopt multiregion architectures. Proactive disaster recovery planning is recommended to ensure uninterrupted clinical operations.

- **Offering (product) strategy:** AWS's advanced clinical intelligence and orchestration tools are not generally available yet. Key capabilities like automated clinical coding, clinical decision support, and prior authorizations remain in beta or on a 12-to-24 month roadmap, delaying immediate out-of-the-box deployment.

Appian

Appian is a Niche Player in this Magic Quadrant. Its Appian Platform utilizes a broad range of tools such as Appian Design Studio, Agent Studio, and its data fabric. This platform ensures integration capabilities, compliance, and user accessibility through the use of global technical, architectural, and data standards.

Appian is headquartered in the U.S. with geographically diversified operations across North America, Latin America, Europe, Africa, the Middle East, and Asia/Pacific. Its clients are public health systems and large hospitals, including the healthcare provider, payer, public sector, and life sciences sectors.

Appian declined requests for supplemental information or to review the draft contents of this document. Gartner's analysis is therefore based on other credible sources.

Strengths

- **Offering (product) strategy:** The Appian Platform features native HL7 and FHIR data fabric connectors that read data directly from EHR systems without duplicating databases. This avoids data sync issues for clients and reduces deployment time, enabling faster realization of value from integrated health data.
- **Vertical/industry strategy:** Appian delivers prebuilt, domain-specific modules like Patient Journey Management and Utilization Management. This helps clients deploy customized clinical workflows without writing code from scratch, allowing them to rapidly implement tailored clinical solutions without heavy IT overhead.
- **Product/service:** Appian uses an all-inclusive licensing model that bundles security tools like Health Insurance Portability and Accountability Act (HIPAA) compliance, HITRUST-certified cloud environments, and secure private generative AI nodes. Clients benefit from enterprise-grade security, streamlining compliance and reducing the burden of managing multiple vendors.

Cautions

- **Sales execution/pricing:** Appian requires a high initial financial investment, and its licensing can scale unpredictably as adoption by hospital staff increases. As a result, clients may face budgetary challenges and unanticipated costs.
- **Customer experience:** The Appian Platform features a steep technical learning curve and complex workflow configuration that frequently demands specialized developers to build custom interfaces. Clients lacking in-house expertise may encounter delays and higher implementation costs, limiting the speed and flexibility of solution customization.
- **Business model:** Using proprietary platforms risks vendor lock-in. Migrating complex automated pathways or data fabric integrations to alternative platforms later requires considerable cost. Clients should assess Appian's long-term product roadmap and platform fit, as future transitions could incur significant operational disruption and financial outlay.

b.well Connected Health

b.well Connected Health is a Niche Player in this Magic Quadrant. Its b.well platform and Health Data Management Foundation, along with its health.360, health.access, and bailey (AI assistant) products, aggregate and normalize fragmented clinical, claims, pharmacy, and consumer data into a single FHIR-native longitudinal patient record. These products enable consumer-driven, “shoppable” healthcare access and AI-driven workflow orchestration.

b.well is headquartered in the U.S. with operations mostly focused in the U.S. Its clients include enterprise health systems, health plans, digital health vendors, and consumer technology companies.

Strengths

- **Product/service:** The b.well platform uses its FHIR-native Health Data Management Foundation to aggregate and normalize fragmented clinical, claims, and consumer data into a single longitudinal patient record. This allows clients to provide more informed care delivery based on comprehensive insight into patient health histories.
- **Market understanding:** The b.well platform makes healthcare “shoppable,” unifying digital, virtual, and in-person services into a single, seamless patient experience that helps providers drive acquisition and retention. This enables clients to enhance patient engagement through an integrated approach to care access.

- **Innovation:** b.well offers agentic AI capabilities through its AI assistant bailey and low-code Health Skills library, empowering nontechnical users to build and autonomously execute complex care workflows grounded in real patient data. This allows clients to accelerate workflow automation without relying heavily on technical resources.

Cautions

- **Offering (product) strategy:** Because b.well does not offer native intelligent workflow clinician or hospital administrative management tools, patient flow logistics, administrative automation, and dynamic clinical task triage are not supported. This may limit operational efficiency for clients seeking comprehensive administrative solutions within the platform.
- **Sales execution/pricing:** As a private company, b.well does not publicly disclose average deal size ranges or multiyear contract percentages, which may limit financial transparency for prospects during early evaluations. Clients may find it challenging to benchmark pricing or assess long-term investment value compared to other vendors.
- **Geographic strategy:** b.well's geographic focus is currently limited to the U.S. market, with no immediate plans for international expansion or compliance frameworks. International clients may find support limited if seeking solutions outside of the U.S.

Better

Better is a Visionary in this Magic Quadrant. Its Better Platform is an open data, standards-based digital health solution. This platform combines structured clinical data management using openEHR and FHIR, low-code application development, and composable clinical solutions on a single architecture.

Better is headquartered in Slovenia with operations mostly focused in Europe and emerging expansions in Asia/Pacific, Africa, and Latin America. Its clients are large public sector healthcare providers, national health programs, and regional hospital networks, such as NHS Trusts in the U.K.

Strengths

- **Offering (product) strategy:** The Better Platform uses an open data architecture that natively stores all clinical data in the vendor-neutral openEHR and FHIR formats, ensuring information is structured, semantically rich, and immediately queryable upon capture. This allows clients to efficiently access and analyze clinical data for improved decision making.

- **Innovation:** The platform features Better Studio that empowers clinical informaticians and business technologists to visually build and deploy governed applications without relying on software engineers. Clients benefit from accelerated innovation cycles and reduced development bottlenecks.
- **Vertical/industry strategy:** The Better Platform is designed to meet regulatory requirements by using a structured data system that can create and share standardized patient summaries across borders, without needing extra infrastructure. This helps clients meet evolving compliance requirements with greater ease.

Cautions

- **Geographic strategy:** U.S. buyers should be aware that Better does not actively target the U.S. market and currently considers it outside of its 12-month geographic focus. U.S.-based clients will have limited access to support, resources or tailored solutions during this period.
- **Customer experience:** Better acknowledges that stringent Medical Device Regulation (MDR) certification acts as its biggest barrier and a potential showstopper for rapidly deploying clinical use cases into production. Clients seeking swift implementation of regulated clinical solutions may encounter delays or additional compliance challenges.
- **Product/service:** Better does not provide a native catalog of prebuilt predictive analytics or machine learning models out of the box, so customers must integrate third-party business intelligence platforms to execute these functions. This can increase implementation complexity for clients pursuing advanced analytics initiatives.

Google

Google is a Challenger in this Magic Quadrant. Its Google Cloud product delivers an interoperable foundation through its Cloud Healthcare API, securely unifying FHIR, HL7v2, and DICOM data. Providers can leverage Agent Search to extract clinical insights from unstructured patient records. Furthermore, medically tuned models like MedLM drive autonomous administrative agents and ambient clinical documentation.

Google is headquartered in the U.S. with geographically diversified operations across North America, Latin America, Europe, Africa, the Middle East and Asia/Pacific. Its clients range from digital health startups to global enterprise health systems, including the healthcare provider, payer, public, and life sciences sectors.

Google declined requests for supplemental information or to review the draft contents of this document. Gartner's analysis is therefore based on other credible sources.

Strengths

- **Offering (product) strategy:** Google Cloud's Healthcare Data Engine supports FHIR R4 standards and integrates with EHR vendors like Epic Systems, enabling providers to connect and query patient records without custom middleware. This simplifies interoperability and accelerates client access to clinical data, reducing IT complexity for efficient care delivery.
- **Innovation:** Google's multimodal and agentic clinical AI advancements like Visual Q&A allow its systems to process complex medical forms, tables, and images directly. This gives clients access to AI tools that enhance clinical decision making and automate administrative tasks.
- **Market understanding:** Google Cloud's healthcare platform processes real-world clinical data, providing empirical visibility into how providers actually consume cloud infrastructure, where integration breaks down, and which AI use cases deliver measurable ROI. Clients benefit from solutions that are grounded in proven industry needs and deliver tangible value.

Cautions

- **Business model:** Google's healthcare initiatives have historically shifted focus, evidenced by the launch and dissolution of Google Health, which can create uncertainty when making multiyear clinical or data-platform investments. Clients may face increased risk when planning technology investments, as future platform direction and support can be unpredictable.
- **Market strategy:** Google's sales and delivery approach often depends heavily on system integrators, cloud partners, and provider-side engineering teams. Clients may experience variability in implementation quality, slower time to value, and less direct accountability, which could impact operational efficiency and satisfaction with the solution.
- **Customer experience:** Google Cloud's technical field operations and postsale support have shown inconsistency in quality. Customers and delivery partners have reported variability in aftercare, which could impact implementation outcomes and ongoing operational performance.

Innovaccer

Innovaccer is a Leader in this Magic Quadrant. Its Gravity by Innovaccer is an autonomous healthcare intelligence platform that unifies fragmented clinical, financial, and operational data into a single solution. This enables organizations to deploy agentic AI to achieve enterprisewide operational autonomy and value-based care outcomes.

Innovaccer is headquartered in the U.S. with operations mostly focused in the U.S. plus active expansion into the Middle East, Canada, and Europe. Its clients are large enterprise health systems, midmarket integrated delivery networks (IDNs), specialty/ambulatory groups, and payer organizations.

Strengths

- **Innovation:** Innovaccer provides a prebuilt, healthcare-ready data fabric equipped with more than 6,000 data quality rules and over 200 connectors, reducing the typical 16-to-24-month foundation build to just four to six months. This accelerates clients' ability to unify and leverage healthcare data for strategic initiatives.
- **Overall viability:** Gravity by Innovaccer can help earnings before interest, taxes, depreciation and amortization (EBITDA) improvements across the enterprise by automating multiple workflows in revenue cycle management, patient access, specialty pharmacy, and population health. Clients can realize measurable financial benefits through streamlined operations.
- **Product/service:** Innovaccer ensures secure, enterprisewide AI scaling through a zero-trust governance architecture with mandatory model impact assessments, always-on PHI redaction, and nanosecond-stamped audit logs. This approach helps clients maintain compliance while confidently expanding AI use across their organizations.

Cautions

- **Customer experience:** Transitioning from legacy modules to the unified Gravity architecture can introduce data model migration and workflow reconfiguration complexities that previously extended timelines. Despite Innovaccer's phased mitigation tools, clients should still budget for upfront training and change management investments.
- **Offering (product) strategy:** Although Innovaccer has commercial agreements with initial ISV partners, its self-service marketplace storefront is not targeted to launch until later in

2026. Clients seeking immediate access to a broad ecosystem of third-party solutions may experience limited options and slower integration timelines in the near term.

- **Marketing execution:** While Innovaccer's Gravity platform features expanding reference sites and high-impact case studies, its volume of long-term, third-party-validated ROI evidence remains smaller than that of mature competitors. Buyers may have less independent validation when assessing long-term operational impact.

InterSystems

InterSystems is a Challenger in this Magic Quadrant. Its InterSystems IRIS for Health and HealthShare products provide a unified healthcare data platform. These products enable interoperability by unifying fragmented health data into a trusted, longitudinal health record to support clinical, operational, and analytics use cases at scale.

InterSystems is headquartered in the U.S. with operations focused in North America, Europe, Latin America, the Middle East, Asia/Pacific, and South Africa. Its clients are large-scale healthcare provider organizations, including hospitals, health systems, integrated delivery networks, and government health agencies.

Strengths

- **Market understanding:** InterSystems addresses the need for mission-critical reliability by delivering proven, enterprise-grade scalability capable of handling massive transaction volumes and low-latency processing in production environments. This enables clients to maintain consistent performance for high-demand healthcare operations.
- **Offering (product) strategy:** The InterSystems IRIS for Health platform uses a differentiated common data plane architecture that supports relational, object, document, key-value, and vector models on a single data copy. This eliminates data duplication and simplifies enterprise analytics, providing more efficient analytics across diverse use cases for clients.
- **Innovation:** InterSystems HealthShare AI assistant helps clinicians securely summarize and navigate complex longitudinal patient records from within their existing workflows. This enhances clinical efficiency for clients by making critical patient information more accessible at the point of care.

Cautions

- **Customer experience:** Organizations deploying InterSystems in highly heterogeneous IT environments or fragmented legacy systems may encounter operational challenges and extended implementation timelines during large-scale data integration efforts. This can impact how quickly clients achieve full platform value in complex settings.
- **Product/service:** Several advanced AI features, including ambient listening and automated care plan generation, are tied to the InterSystems IntelliCare portfolio and are currently unavailable to buyers in North America. Clients in this region may have limited access to some of InterSystems' latest innovations.
- **Overall viability:** As a private company, InterSystems does not publicly disclose specific operational or financial metrics such as average deal size, exact research and development spending, or the number of full-time employees. This lack of transparency may complicate business viability assessments for clients seeking detailed company information.

Microsoft

Microsoft is a Leader in this Magic Quadrant. Its Microsoft for Healthcare includes Microsoft Fabric, Microsoft Dragon Copilot, and Azure Health Data Services products that provide unified, secure, agentic AI experiences embedded in clinician workflows. These products unify siloed healthcare data and enable organizations to operationalize AI at enterprise scale without displacing their existing EHRs.

Microsoft is headquartered in the U.S. with geographically diversified operations and primary investments continuing across North America, Europe, the Middle East, Africa and key Asia/Pacific markets. Its clients are large integrated health systems, government-affiliated providers, and academic medical centers.

Strengths

- **Product/service:** Microsoft natively embeds governed, agentic AI directly into familiar productivity surfaces like Microsoft Dragon Copilot, Microsoft Dynamics 365, and Teams, reducing workflow disruption and accelerating time to value. This allows clients to adopt advanced AI without requiring them to displace existing EHRs.
- **Sales strategy:** Microsoft's partner ecosystem extends its market reach and fills specialized workflow gaps, underscored by co-engineering alliances like the native integration of Microsoft Dragon Copilot within the EHR workflow. This allows clients to access a broader range of solutions tailored to healthcare operations.

- **Market understanding:** Microsoft delivers measurable ROI by conducting a value assessment based on the provider's environment and use cases, alongside structured proof-of-value pilots that quantify clinical time savings, burnout reduction, and financial outcomes. This provides clients with clear insights into the solution's tangible benefits.

Cautions

- **Offering (product) strategy:** While Microsoft excels at distributing AI at scale, its platform typically augments existing systems rather than natively orchestrating workflows across both clinical and enterprise domains. Clients may need additional solutions for comprehensive end-to-end automation.
- **Customer experience:** Some Microsoft customers have experienced challenges with real-time interoperability across clouds, EHRs, and third-party applications, leading to disrupted workflows and incomplete patient views. This can impact operational efficiency for clients who rely on seamless data exchange.
- **Sales execution pricing:** Unlocking Microsoft's full HP-ICP suite, including Teams, Copilot Studio, and Microsoft Power Platform, requires premium Microsoft 365 E3 or E5 licenses. Health systems not already on these tiers must factor in this foundational licensing cost.

Oracle

Oracle is a Visionary in this Magic Quadrant. Rather than disconnected solutions, it delivers an integrated product portfolio spanning Oracle Health, Fusion Cloud Applications, and OCI. This unified architecture combines healthcare SaaS, platform as a service (PaaS), and infrastructure to orchestrate clinical, financial, and operational workflows while embedding AI directly into these processes.

Oracle is headquartered in the U.S. with global cloud regions and deployment support in North America, Europe, the Middle East, the U.K., Canada, Asia/Pacific, Latin America, and Africa. Its clients are healthcare provider organizations, ranging from enterprise-level health systems seeking cross-domain workflow automation to government entities executing national healthcare transformation programs.

Strengths

- **Offering (product) strategy:** Oracle combines Oracle Health, Oracle Fusion Cloud Applications, and Oracle Cloud Infrastructure to orchestrate real-time, AI-embedded

workflows across clinical, financial, and operational domains. This enables clients to drive efficiency across multiple business areas without managing disparate systems.

- **Intelligent workflow orchestration:** Oracle seamlessly executes complex physical hospital logistics and high-friction administrative orchestration natively, with limited reliance on third-party extensions. Clients benefit from reduced integration complexity and improved reliability by leveraging a single-vendor solution.
- **Geographic strategy:** Oracle provides data sovereignty and compliance flexibility with localized deployment options like Oracle Cloud@Customer and a variety of sovereign cloud solutions to meet strict global regulations. This allows clients to address local compliance requirements while maintaining access to enterprise-grade cloud capabilities.

Cautions

- **Product/service:** Oracle delivers a broad native HP-ICP foundation; however, clinical automations — including clinical coding, medical image interpretation, and prospective risk adjustment — rely on use-case-specific ecosystem extensions. Clients requiring these capabilities should evaluate potential integration complexity and associated third-party licensing costs.
- **Sales execution/pricing:** Oracle does not offer a single enterprise unlimited-user license, as pricing varies by component. While Health Data Intelligence is population-priced, other services scale by facility, module, scope, or usage. This multivariable model requires careful cost modeling to prevent unpredictable spend.
- **Customer experience:** Concerns have emerged regarding Oracle's reliability as a long-term strategic healthcare partner following its April 2026 workforce reductions. This could negatively impact support services and delivery projects for clients.

Persivia

Persivia is a Niche Player in this Magic Quadrant. Its Persivia CareSpace includes the Soliton AI Engine, Persivia CareTrak, and Persivia Data Cloud. These products provide a unified care management and population health platform, normalizing disorganized data from multiple sources and using AI to surface actionable insights directly into clinical workflows to support value-based care.

Persivia is headquartered in the U.S. with a strong presence in North America and rapid expansion into the Middle East and North Africa (MENA) region, specifically Saudi Arabia. Its clients are healthcare provider organizations, ranging from independent physician practices to large health systems.

Strengths

- **Offering (product) strategy:** Persivia differentiates via its patented Soliton AI Engine, which uses low-code agentic AI capabilities to autonomously execute complex workflows. This allows clients to automate sophisticated processes with minimal coding, reducing operational burden and accelerating time to value.
- **Market responsiveness:** Persivia demonstrated global market responsiveness by opening a regional headquarters and Center of AI Excellence in Saudi Arabia aligned with the nation's Vision 2030 healthcare goals. Clients in the region benefit from localized support, innovation aligned with national priorities and enhanced access to advanced AI capabilities.
- **Business model:** Persivia is shifting its commercial pricing structure from standard software licensing to a shared-risk model tied to the outcomes its platform helps clients achieve. This provides greater financial alignment between technology investment and measurable results for clients.

Cautions

- **Marketplace strategy:** Persivia relies on a controlled partner integration model that may limit a customer's ability to rapidly discover and deploy a wide ecosystem of extended solutions. Clients may face constraints when seeking integrations or rapid adoption of new innovations.
- **Data governance strategy:** Persivia CareSpace currently lacks native privacy masking and deidentification tools for secondary use. Clients requiring robust data privacy features may need interim solutions or face delays in meeting compliance requirements.
- **Geographic strategy:** Persivia's approach relies on broad cloud regions and lacks the dynamic, hyperlocal cloud zoning or edge computing orchestration required to navigate highly complex, city-level data sovereignty laws. Clients operating in jurisdictions with strict local data requirements may encounter challenges obtaining full compliance.

Salesforce is a Leader in this Magic Quadrant. Its Agentforce 360 for Health product portfolio enables longitudinal care orchestration and proactive patient engagement. This platform connects and automates workflows across the front, mid, and back office.

Salesforce is headquartered in the U.S. with geographically diversified operations and established market leadership in North America and Australia, alongside accelerated investments in high-growth regions like Latin America, the Middle East, and the broader Asia/Pacific region. Its clients are healthcare provider organizations of all sizes, ranging from small-to-midsize physician groups and community hospitals to large-enterprise health systems.

Strengths

- **Product/service:** Salesforce delivers a consumer data management platform that natively unifies clinical, nonclinical and engagement data to execute hyperpersonalized, omnichannel patient journeys without requiring third-party extensions. Clients benefit from robust integration for more effective patient engagement and improved outcomes.
- **Sales strategy:** Salesforce deploys a dedicated business value services team throughout the sales cycle to build personalized ROI analyses and financial models that demonstrate value to healthcare executives. This helps clients make informed investment decisions with clear visibility into expected returns.
- **Business model:** Salesforce operates a collaborative and governed marketplace through AgentExchange, offering thousands of vetted third-party applications and AI agents to extend platform capabilities. Clients can easily discover, evaluate and implement trusted solutions that enhance their core platform investment.

Cautions

- **Offering (product) strategy:** Salesforce does not operate in the clinical diagnosis space and relies on third-party partner extensions or the underlying EHR to execute core clinical workflows. Clients may experience increased integration complexity, costs and dependency on external vendors for critical clinical functions.
- **Sales execution/pricing:** Agentforce 360 for Health deployments frequently experience elongated or stalled sales cycles due to intensive legal and compliance scrutiny on AI safety and data governance. This may delay time to value for Salesforce clients pursuing comprehensive transformation initiatives involving significant AI.

- **Geographic strategy:** Organizations operating outside of primary regions may face strict data sovereignty constraints, as Salesforce cannot natively meet certain local data residency laws without relying on external partner solutions. Clients in these regions may encounter additional compliance challenges or require supplementary vendor relationships.

Inclusion and Exclusion Criteria

To qualify for inclusion, vendors must fulfill all of the following requirements:

- HP-ICP products and services must conform to the Gartner market definition; in particular, they must meet the mandatory requirements.
- HP-ICP products and services should be generally available as of 1 April 2026. This means they are accessible to a broad customer base and not limited to exclusive or limited distribution channels.
- Vendors must be able to demonstrate that their HP-ICP is available across multiple geographic regions with evidence such as regional presence or proof of operations in the regions in which they claim revenue (e.g., North America, Europe, Asia/Pacific, Latin America, and the Middle East and Africa). Proof of operations includes physical buildings cited on the website, local language support, support of local currencies and billing, and website references to customers in that particular market, location or distribution channel.
- The vendor's HP-ICP must have been available for at least one year to 31 March 2026 and be in use by customers. Evidence must be provided to support this.
- Vendors must be able demonstrate at least five customers using their HP-ICP. A list of customers should be provided for verification.
- The vendor's HP-ICP must include a marketplace to support the packaged business capability (PBC) ecosystem. This marketplace should facilitate integration, collaboration, and value exchange within the ecosystem.
- Vendors must have a set of connectors available to extract data from healthcare systems of record, such as EHRs, to the data fabric.

Evaluation Criteria

The evaluation criteria and weights describe the specific characteristics and their relative importance that contribute to Gartner's view of the market. These criteria are used to comparatively evaluate HP-ICP providers in this research.

Ability to Execute

Product/Service

The capabilities, features and overall quality of the core goods and services that compete in and/or serve the defined market. This includes reviewing the breadth, depth, and overall quality of the platform's native capabilities across the three core HP-ICP layers (integrated data fabric, packaged business capabilities, and composition layer), and the vendor's demonstrated Ability to Execute healthcare-specific use cases.

Overall Viability

The vendor's overall financial health, as well as the financial and practical success of the relevant business unit. This includes the likelihood that the organization can continue to offer and invest in the product, as well as the product's position in the organization's portfolio.

Reviewing specifically the vendor's overall commitment to the HP-ICP market, demonstrated by the total number of active customers, year-over-year new customer growth, the number of dedicated full-time equivalents (FTEs), and planned financial investments in this space.

Sales Execution/Pricing

The vendor's capabilities in all presales activities and the structures that support these activities. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

Market Responsiveness/Record

The ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This includes the provider's history of responsiveness to changing market demands.

Marketing Execution

The ability to deliver clear, high-quality, creative and effective messaging via publicity, promotional activity, thought leadership, social media, referrals and sales activities. This includes the organization’s ability to influence the market, promote the brand, increase awareness of products and establish a positive reputation among customers.

Customer Experience

The degree to which a vendor’s products, services and programs enable customers to achieve their desired results. This includes the quality of supplier/buyer interactions, technical support or account support, as well as ancillary tools, customer support programs, availability of user groups and service-level agreements. This includes reviewing evidence of the ability to help clients achieve quantifiable return on investment (ROI) and outcome-driven metrics (ODMs); the mechanisms vendors use to continuously measure and improve the customer experience; and engagement with user groups such as customer advisory boards.

Operations

The ability of the vendor to meet its goals and commitments. This includes the quality of its organizational structure, skills, experiences, programs and systems that enable the organization to operate effectively and efficiently.

Ability to Execute Evaluation Criteria	
Evaluation Criteria	Weighting
Product or Service	High
Overall Viability	High
Sales Execution/Pricing	Medium
Market Responsiveness/Record	High
Marketing Execution	Low
Customer Experience	High

<i>Evaluation Criteria</i>	<i>Weighting</i>
Operations	Medium

Source: Gartner (July 2026)

Completeness of Vision

Market Understanding

The ability to understand customer needs and translate that understanding into products and services. Vendors with a clear vision of the market listen to and understand customer demands, and they can shape or enhance market changes with their vision.

Marketing Strategy

The ability to clearly communicate differentiated messaging, both internally and externally, through social media, advertising, customer programs and positioning statements.

Sales Strategy

The ability to create a sound strategy for selling that uses the appropriate networks, including direct and indirect sales, marketing, service, and communication. This includes partnerships that extend the scope and depth of a provider’s market reach, expertise, technologies, services and customer base.

Offering (Product) Strategy

The ability to approach product development and delivery in a way that meets current and future requirements, with an emphasis on market differentiation, functionality, methodology and features.

Business Model

The design, logic and execution of the organization’s business proposition.

Vertical/Industry Strategy

The ability to strategically direct resources (sales, product, development), skills and products to meet the specific needs of verticals and market segments.

Innovation

Marshaling of resources, expertise or capital for competitive advantage, investment, consolidation or defense against acquisition.

Geographic Strategy

The ability to direct resources, skills and offerings to meet the specific needs of regions outside the provider’s home region, either directly or through partners, channels and subsidiaries.

Completeness of Vision Evaluation Criteria	
<i>Evaluation Criteria</i>	<i>Weighting</i>
Market Understanding	High
Marketing Strategy	Low
Sales Strategy	Medium
Offering (Product) Strategy	High
Business Model	Medium
Vertical/Industry Strategy	Medium
Innovation	High
Geographic Strategy	Medium

Source: Gartner (July 2026)

Quadrant Descriptions

Leaders

Leaders demonstrate broad support for all critical capabilities across the core HP-ICP architectural layers, including the healthcare data fabric, packaged business capabilities (PBCs), and composition tools. They have high market awareness, high market penetration, significant market momentum, and a clear, long-term strategic vision for helping healthcare organizations transition away from rigid, monolithic EHR dependencies toward agile, cloud-native environments. They are distinguished by their ability to innovate rapidly, and consistently invest in expanding cross-domain workflow orchestration, FHIR-native interoperability, and governed agentic AI capabilities to support providers with diverse clinical, financial, and operational needs.

Challengers

Challengers offer solid core HP-ICP functionality but may lack the breadth and depth of Leaders, particularly when it comes to advanced AI capabilities and seamless, real-time integrations across the broader healthcare enterprise. They focus on established clients' needs for data aggregation and basic operational optimization rather than on setting a visionary pace with intent-driven AI orchestration. In addition, they may lack the expansive healthcare marketplace ecosystems, dedicated sales channels, robust global geographic compliance presence, or market awareness of the vendors in the Leaders quadrant.

Visionaries

Visionaries set a strategic direction or demonstrate specific innovative capabilities in one or more functional areas, such as autonomous agentic AI assistants, configurable low-code clinical automation, advanced FHIR-native data architectures, or specific industry modules. Although Visionaries show immense promise in enabling the composable healthcare enterprise, they often have gaps in broader platform functionality requirements or may be lacking in some aspects of their service and support resources, enterprise scalability, and/or business and partner ecosystems. These gaps may limit their Ability to Execute at scale, limiting their market presence and growth potential.

Niche Players

Niche Players provide a foundational set of HP-ICP capabilities, typically to a narrow segment of the market. They may be focused on healthcare provider organizations of a particular size, specific geographies, or distinct, siloed use cases (such as exclusively focusing on digital front doors or retrospective analytics). HP-ICP vendors in this quadrant often lack the end-to-

end breadth and depth of capabilities offered by Leaders, such as native clinical intelligence or comprehensive data life cycle governance, limiting their ability to orchestrate workflows across the entire care continuum.

Context

The HP-ICP market has emerged as healthcare organizations seek to overcome the limitations of legacy, monolithic EHR systems by adopting agile, cloud-native architectures and capabilities. Historically, massive investments in monolithic IT systems have constrained innovation, forcing providers to adapt to vendor-led development and release cycles rather than responding dynamically to their own clinical and business needs.

Today, healthcare providers face compounding industry pressures, including clinician burnout, financial margin compression, and shifting patient expectations toward ubiquitous, consumer-grade care. To navigate these challenges, providers are adopting modular capabilities that activate data across the entire care continuum (see [Innovation Insight: The Health Data Management Platform](#)). The HP-ICP approach provides a strategic framework for organizations to rapidly acquire, adapt, and scale digital business capabilities in response to these shifting strategic imperatives.

The HP-ICP is a precise suite of technologies designed to build an all-encompassing enterprise cloud strategy. By adopting an “exoskeleton” model, healthcare providers can seamlessly overlay value onto their current enterprise and cloud architectures, strengthening and maximizing these existing investments for long-term operations. This unified methodology delivers a far more integrated cloud framework than legacy, fragmented SaaS-, PaaS-, and infrastructure as a service (IaaS)-centric models.

As evaluated in this Magic Quadrant, a comprehensive HP-ICP combines three foundational architectural elements:

- A healthcare data fabric that ingests, cleanses, and normalizes siloed application data into a standardized data model to create a longitudinal patient record.
- A library of packaged business capabilities representing prebuilt software components that can be assembled to address distinct clinical, financial, and administrative use cases at scale.

- Composition and orchestration tools that empower business technologists and clinicians to build digital experiences, orchestrate workflows, and optimize patient journeys based on real-time behavior and context.

In each of the three foundational elements, AI, especially agentic AI, is emerging as having a key role in the HP-ICP. For example, machine learning has been used for some time in the data fabric layer; generative and agentic AI increasingly have been used in PBCs; and agentic AI has been used in the composition layer.

This Magic Quadrant reflects a pivotal market shift fueled by artificial intelligence. HP-ICPs are moving generative and agentic AI beyond pilots, embedding them as governed tools to enhance clinical decisions and automate complex administrative tasks. By enabling data liquidity, clinical safety, and composable architecture, HP-ICPs are laying the groundwork for the next generation of anticipatory, AI-driven healthcare.

Market Overview

The HP-ICP market is undergoing change due to a combination of hype and genuinely novel AI capabilities that promise to reconfigure and transform health systems. As providers face mounting pressure to improve clinical outcomes and operational efficiency, HP-ICPs have become essential tools for innovation, automating workflows, unifying fragmented data, and activating the real-time health system and intelligence from across the care continuum (see [Healthcare Provider CIOs: Use RTHS Principles to Drive Digital Transformation](#)).

The Rise of Domain-Specific HP-ICP Solutions

This shift toward industry-specific cloud platforms is driven by the limitations of monolithic systems of record and horizontal cloud platforms, which can sometimes constrain innovation by binding healthcare organizations to vendor-led development cycles rather than their own dynamic business needs.

General-purpose AI tools and horizontal clouds frequently lack the strict data governance, clinical safety guardrails, and explainability required. When building solutions entirely from scratch, they can demand substantial financial and human capital investments. Healthcare is a high-stakes environment and requires accuracy and compliance — the time required for heavy customization, even when starting with general-purpose models, can be elongated (see [How Healthcare CIOs Realize AI Value Part 2: Evaluation and Implementation](#)).

To overcome these barriers, healthcare organizations are turning to specialized, purpose-built HP-ICPs that deliver a modular and agile architectural approach. These domain-specific platforms utilize FHIR-native data fabrics to aggregate, cleanse, and normalize fragmented clinical, financial, and consumer data into a unified, longitudinal patient record without requiring a complete infrastructure replacement.

By establishing this trustworthy, real-time data foundation, HP-ICPs enable the secure deployment of healthcare-trained agentic AI and intelligent workflow orchestration directly into administrative and clinical operations. Ultimately, this allows healthcare providers to safely automate complex tasks, reduce clinician burnout, and proactively manage patient populations with the transparency, traceability, and regulatory compliance necessary for modern healthcare delivery.

This is the inaugural Gartner Magic Quadrant for Healthcare Provider Industry Cloud Platforms (HP-ICP).

⊕ Evidence

Gartner Healthcare and ICP Definitions

The Real-Time Health System and Health Data Management Platform Capabilities

The real-time health system (RTHS) is an operational vision and framework, not a stand-alone technological product. It represents the ultimate clinical and operational outcome: using real-time situational awareness to anticipate, optimize, and orchestrate enterprise workflows and capacity (see [Healthcare Provider CIOs: Use RTHS Principles to Drive Digital Transformation](#)).

The health data management platform (HDMP) offers a collection of data services and capabilities specifically configured for the healthcare industry to enable fluid, agile, real-time exchange and use of health information. HDMPs leverage modern technologies (such as cloud, data fabric and AI) and provide industry contextualization through standards and execution accelerators for healthcare-specific use cases (see [What CIOs Need to Know About Health Data Management Platforms](#)).

The healthcare provider ICP market is capable of providing the technical capabilities to realize key components of the RTHS vision, and many offerings contain data fabric capabilities that

can act as an HDMP solution.

Building on this, the HP-ICP's upper layers — a PBC marketplace and composition tools — provide the service orchestration and low-code automation necessary to realize the RTHS operational vision.

The Digital Health Platform (DHP) and Healthcare Provider Industry Cloud Platform (HC-ICP)

In previous years, Gartner has referred to the DHP as the architectural exemplification of an industry cloud platform that is tailored for the healthcare provider industry. The two terms have been synonymous in previous reports such as Market Guides and Competitive Landscape Reports. In 2026, to ensure consistency with wider ICP research — which includes research into similar platforms for other industries such as life sciences and banking, among others — we now refer to the DHP as a healthcare provider industry cloud platform (HC-ICP) (see [Innovation Insight: Healthcare Provider Industry Cloud Platforms](#)).

ICP Market and the Roles Participants Play

In the ICP market, different ecosystem players can fulfill required roles. Sometimes, one vendor handles all roles; other times, multiple providers collaborate in partnership. A common example across a number of industry verticals is where an ICP solution provider partners with a cloud provider for IaaS or components to help deliver their marketplace or composition tools (see [Market Guide for Industry Cloud Platforms](#), which provides a sample list of vendors by industry). The advantage of this to the customer can be that the preferred supplier of general cloud hosting services can often be accommodated by those vendors that offer multicloud solutions.

Examples include:

- All-in-one provider: One company delivers platform, applications, and services, directly managing customer relationships. This model is common among industry giants, who may bundle services and partner with others to broaden their reach.
- Collaborative ecosystem: Multiple providers, each specializing in a role (platform, components, integration), work together under one orchestrator. This suits situations where no single provider excels at everything or complex challenges require diverse expertise.
- Customer-led orchestration: Customers coordinate the ecosystem, selecting providers for specific needs, giving them more control and alignment with their requirements.

The best structure depends on participants’ capabilities, industry, and desired control. Each approach offers unique benefits and trade-offs to create value and address industry needs.

⊕ Evaluation Criteria Definitions

Unlock more AI value

With unmatched, proprietary AI insights from Gartner

[Explore the AI Hub ↗](#)

© 2026 Gartner, Inc. and/or its affiliates. All rights reserved. Gartner is a registered trademark of Gartner, Inc. and its affiliates. This publication may not be reproduced or distributed in any form without Gartner's prior written permission. It consists of the opinions of Gartner's research organization, which should not be construed as statements of fact. While the information contained in this publication has been obtained from sources believed to be reliable, Gartner disclaims all warranties as to the accuracy, completeness or adequacy of such information. Although Gartner research may address legal and financial issues, Gartner does not provide legal or investment advice and its research should not be construed or used as such. Your access and use of this publication are governed by [Gartner’s Usage Policy](#). Gartner prides itself on its reputation for independence and objectivity. Its research is produced independently by its research organization without input or influence from any third party. For further information, see "[Guiding Principles on Independence and Objectivity](#)." Gartner research may not be used as input into or for the training or development of generative artificial intelligence, machine learning, algorithms, software, or related technologies.

[About Us](#) [Search Careers](#) [Newsroom](#) [Policies](#) [Site Index](#) [Featured Insights](#)
[Contact Us](#) [Send Feedback](#)

Gartner

© 2026 Gartner, Inc. and/or its Affiliates. All Rights Reserved.