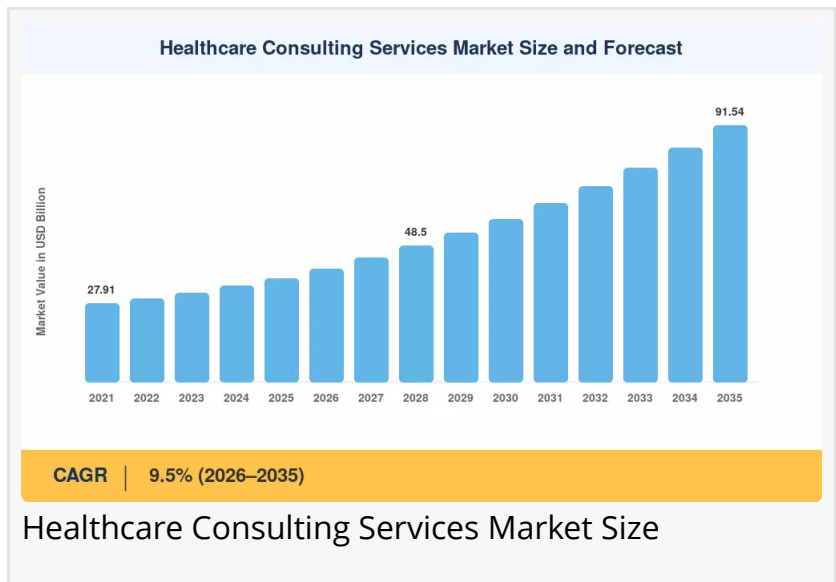


Healthcare Consulting Services Market to reach USD 91.54 Billion by 2035 at 9.5% CAGR

Healthcare Consulting Services Market to Surge from USD 40.45 Billion in 2026 to USD 91.54 Billion by 2035---Powered by Value-Based Payment Model Migration

NY, CA, UNITED STATES, July 17, 2026 /EINPresswire.com/ -- As per Market Research Future, the [global Healthcare Consulting Services Market size](#) to reach USD 91.54 Billion by 2035 from USD 40.45 Billion in 2026, at a CAGR of 9.5% during the forecast period 2026--2035. The market base was estimated at USD 36.94 Billion in 2025.



The 9.5% CAGR---anchored by structural healthcare transformation demand rather than discretionary advisory spending---is driven by three converging forces: the migration from fee-for-service to value-based payment models that compel provider organizations to re-engineer care-delivery workflows and financial-risk analytics, sustained escalation in healthcare cybersecurity threats that has pushed average breach costs to USD 10.93 million per incident for the 14th consecutive year, and cloud EHR migration coupled with interoperability mandates that absorb an estimated USD 18 billion in annual IT spending across OECD nations. Together, these pressures push provider organizations toward external advisory expertise they cannot build quickly enough in-house.

National governments and multilateral health organizations are amplifying this momentum. The Centers for Medicare & Medicaid Services (CMS) Accountable Care Organization Realizing Equity, Access, and Community Health (ACO REACH) initiative now serves over 2.2 million Medicare beneficiaries, requiring participating systems to engage multi-year consulting transformation initiatives across clinical, operational, and IT domains.

The U.S. Office of the National Coordinator for Health IT (ONC) issued the HTI-1 rule, requiring certified EHR vendors to provide FHIR-based APIs by December 2025, generating a waterfall of vendor-selection, data-migration, and workflow-redesign advisory demand. The World Bank

committed over USD 5 billion to health-system-strengthening programs in 2024 alone, with consulting-services components embedded across most project scopes. Together, these initiatives are creating the procurement infrastructure and delivery innovation on which the Healthcare Consulting Services Market depends.

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Key Market Trends & Growth Drivers

Value-Based Payment Model Migration

The single largest structural driver of the Healthcare Consulting Services Market is the change from fee-for-service to value-based care arrangements. The CMS Accountable Care Organization Realizing Equity, Access, and Community Health (ACO REACH) initiative now serves over 2.2 million Medicare beneficiaries and requires participating systems to re-engineer care-delivery workflows and financial-risk analytics.

Provider businesses with limited internal actuarial and population health capabilities increasingly turn to consulting firms for multi-year transformation initiatives across clinical, operational, and IT domains. Each percentage point of value-based contract penetration translates into measurable consulting engagement volume, and the structural payment reform tail embedded in routine healthcare administration makes this driver durable through 2035.

Healthcare Cybersecurity Threat Escalation

Ransomware attacks on hospitals increased by 74% from 2022 to 2024. The healthcare sector has the greatest average cost of breaches, at USD 10.93 million, for the 14th straight year. This threat environment generates demand for security-architecture evaluations, incident-response planning, and HIPAA risk-analysis engagements. Consulting firms with specific health-IT security practices are experiencing double-digit revenue growth in this sub-segment. The convergence of diagnostic radiopharmaceuticals with therapeutic alpha-emitters is creating theranostic platforms that personalize cancer bone spread treatment at scale.

Cloud EHR Migration and Interoperability Mandates

The U.S. Office of the National Coordinator for Health IT (ONC) issued the HTI-1 rule, requiring certified EHR vendors to provide FHIR-based APIs by December 2025. Compliance leads to a waterfall of consulting demand: health systems need vendor-selection advice, data-migration planning, and workflow-redesign support. Globally, OECD countries are predicted to spend a total of USD 18 billion per year on EHR modernization initiatives, and this is expected to expand at 12% per annum until 2030. Pooled procurement through national health systems drives per-

engagement prices down for high-volume IT consulting, expanding access while compressing firm margins.

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Market Segment Insights

BY SERVICE TYPE

IT Consulting: Dominant segment with ~34.5% revenue share in 2025. Reflecting entrenched health-system reliance on technology decisions that carry multi-year operational and financial consequences. Cloud migration, cybersecurity imperatives, and interoperability mandates anchor institutional procurement budgets globally due to their low cost-to-outcome ratio and decades of clinical evidence supporting IT infrastructure optimization. Hospital procurement teams treat it as a default first-line engagement, and scalable delivery has enabled broad adoption even in cost-sensitive emerging markets.

Digital Transformation Consulting: Fastest-growing service segment at 11.0% CAGR (2026--2035). Driven by new AI deployment, telehealth scaling, and enterprise data-lake initiatives. Engagements in this category tend to be longer in duration and higher in average contract value than traditional IT projects, as they require cross-functional change management spanning clinical, operational, and financial domains. Pipeline AI-governance and algorithm-validation consulting could double the segment's addressable market by 2030.

Strategy Consulting: USD 8.12 Billion in 2025. Strong demand for merger-integration advisory, market-entry strategy, and growth planning sustains residual demand. Firms with deep C-suite relationships command premium billing rates in this segment.

Operations Consulting: 9.8% market share trajectory (2026--2035). Revenue-cycle optimization, supply-chain redesign, and cost-structure analysis sustain demand across provider and payer organizations.

BY END USER

Healthcare Providers: Dominant end-user segment with ~50.1% revenue share in 2025. Hospitals, health systems, and ambulatory networks face the broadest range of operational, regulatory, and technological pressures simultaneously, making provider consulting a near-universal component of their strategic planning. The inherent complexity of payer-provider dynamics drives sustained dual-channel demand for operations and IT advisory.

Government Agencies: Fastest-growing end-user segment at 11.8% CAGR (2026--2035).

Reflecting public-health digitization acceleration and pandemic-preparedness planning. National and sub-national health authorities investing in digital infrastructure, population-health surveillance, and preparedness frameworks create a larger prevalent population requiring sustained advisory support. The World Bank committed over USD 5 billion to health-system-strengthening programs in 2024 alone, with consulting-services components embedded across most project scopes.

Healthcare Payers: USD 9.54 Billion in 2025. Claims-automation, network-adequacy advisory, and value-based care design sustain demand as payer organizations restructure around outcomes-linked contracts.

BY DELIVERY MODEL

On-Site Consulting: Dominant delivery model with ~44.9% revenue share in 2025. Hospital implementation center infrastructure dominates volume, channeling routine EHR go-live and merger-integration advisory supply. Complex implementations requiring physical presence anchor this segment.

Remote/Virtual Consulting: Fastest-growing delivery model segment at 12.7% CAGR (2026--2035). Cost efficiency and access to scarce expertise drive demand. Virtual delivery platforms reduce per-engagement delivery costs by an estimated 25--35%, enabling healthcare consulting in community settings lacking on-site infrastructure. Health systems that adopted virtual consulting during the COVID-19 pandemic discovered that certain workstreams---including data analytics, policy development, and training---could be delivered effectively without travel.

Regional Outlook

North America -- Dominant Market (~41.9% Share, 2025)

The United States generates approximately 82.4% of North American Healthcare Consulting Services Market revenue, driven by the world's most complex payer-provider ecosystem, CMS value-based payment mandates, HIPAA enforcement, and commercial insurance coverage of consulting engagements as strategic investments---a single policy ecosystem that converted a compliance-dominated market into one with a structural transformation tail. CMS reimbursement frameworks and the ACO REACH model have driven adoption in academic medical centers, while community health networks increasingly engage advisory firms to manage operational capacity. The US dominates through a combination of high per-organization spending, robust payer coverage, and rapid digital transformation adoption.

Canada contributes through provincial health-system modernization programs at 11.7% of regional share, while Mexico is growing at steady pace on IMSS digital transformation and private hospital expansion at USD 0.91 Billion in 2025. North America's leadership rests on reimbursement depth and the structural IT consulting segment created by expanded ONC

compliance mandates and value-based care contracts.

Europe -- Second Largest (USD 10.08 Billion, 2025)

Europe's Healthcare Consulting Services Market reflects divergent national strategies---Germany leads regionally with Hospital Reform Act (KHVVG) implementation advisory, contributing 9.4% CAGR (2026--2035), while the UK historically used selective IT targeting before broadening coverage through NHS digital transformation and elective-care recovery at USD 2.78 Billion in 2025. France contributes ~16.2% of regional share through the EUR 2 Billion Ségur du Numérique health-IT investment program. Italy contributes 10.1% CAGR on PNRR-funded telemedicine and territorial care reform. Spain is growing at steady pace on regional health-system consolidation advisory at USD 0.94 Billion in 2025.

Harmonization pressure from the EU Pharmaceutical Strategy is gradually narrowing these differences, lifting baseline demand across the region. The European Commission's formal adoption of the European Health Data Space (EHDS) Regulation in February 2025 mandates cross-border patient data access and secondary-use governance by 2028, creating fresh consulting demand. The Nordic countries hold ~8.7% CAGR on cross-border health-data sharing initiatives. Russia contributes USD 0.52 Billion on federal e-health platform expansion. Centralized health technology assessment bodies---NICE, G-BA, and HAS---have progressively widened reimbursement for digital health advisory across member states.

Asia-Pacific -- Fastest-Growing Region (13.5% CAGR, 2026--2035)

Asia-Pacific is the engine of the Healthcare Consulting Services Market. China holds the largest regional share with ~28.5% of regional revenue, driven by the Healthy China 2030 initiative and hospital-group consolidation---instantly extending digital health consulting demand across 12,000+ public hospitals. India is growing at 14.8% CAGR on the back of Ayushman Bharat Digital Mission rollout targeting health-ID enrollment for 1.4 billion citizens. Japan contributes USD 1.84 Billion through NHI pricing for next-gen digital health solutions at steady pace. South Korea is growing at 12.2% CAGR on digital health regulation modernization.

ASEAN economies hold ~13.9% CAGR on UHC expansion and hospital PPP advisory. The rest of Asia-Pacific is growing at steady pace on development-bank-funded health system strengthening at USD 0.67 Billion in 2025. The region's combined contribution anchors the global volume base for healthcare consulting demand. Asia-Pacific represents the highest-growth opportunity, driven by a confluence of rising health expectations, urbanization, and government investment in digital health infrastructure.

Middle East & Africa -- Emerging Opportunity (10.8% CAGR, 2026--2035)

The Middle East & Africa is bifurcated between well-funded Gulf states and resource-constrained Sub-Saharan nations. Saudi Arabia leads the region with Vision 2030 healthcare cluster

development, contributing ~34.7% of regional share---NEOM health cluster and the UAE's Cleveland Clinic and Mayo Clinic affiliations have created pockets of excellence for healthcare consulting. The UAE is growing at 11.6% CAGR on medical tourism and smart-hospital builds. South Africa contributes USD 0.38 Billion on National Health Insurance implementation advisory.

Egypt is growing at 12.4% CAGR on Universal Health Insurance law rollout. NGO-supported health-system access programs underpin demand across the rest of the region. Diagnostic infrastructure gaps in LMICs remain a restraint---real-world evidence from development finance institutions indicates that advisory capacity constraints limit consulting penetration to 1--5% of addressable demand in low-income markets. These gaps lead to project discontinuation and institutional reluctance to initiate multi-year transformation regimens, indirectly narrowing the Healthcare Consulting Services Market addressable population.

South America -- Growing Presence (USD 2.51 Billion, 2025)

Brazil anchors South America's Healthcare Consulting Services Market at ~58.6% of regional revenue, with the Unified Health System (SUS) incorporating modernization protocols in 2023, providing a stable demand floor that smooths regional forecasts. Access to specialized consulting remains limited by talent import dependencies, though the Inter-American Development Bank committed USD 820 million to health-system-strengthening programs across South America in 2024, with consulting-services components embedded in most project designs. Argentina is growing at steady pace on private health-insurance reform advisory at USD 0.41 Billion in 2025.

Competitive Landscape and Recent Developments

The Healthcare Consulting Services Market displays medium-high concentration, with the top five firms holding an estimated 38--44% combined revenue share. The Herfindahl-Hirschman Index sits in the 1,200--1,500 range, reflecting a mix of global management-consulting giants and specialized health-IT advisory firms. Barriers to entry are moderate for niche segments but high for full-service offerings requiring clinical, regulatory, and technology capabilities simultaneously. Patent-like knowledge moats and specialized credentialing sustain competitive advantages for first-movers.

The competitive landscape is stratified between strategy advisory pioneers serving global healthcare transformation markets, digital platform expansion specialists capturing technology tenders, and operational efficiency firms consolidating the mid-market hospital segment.

KEY COMPANIES AND RECENT MILESTONES

Accenture (March 2024): Formed a global strategic coalition with leading enterprise technology vendors to accelerate generative AI implementation across provider systems, deploying secure

data pipelines to streamline clinical charting and operational analytics. Technology-led transformation with global delivery centers, holding ~6--9% of global Healthcare Consulting Services Market revenue.

Huron Consulting Group (January 2024): Expanded its healthcare operating capabilities by integrating advanced digital health advisory frameworks, helping health systems mitigate labor shortages by embedding robotic process automation directly into revenue cycle workflows. Mid-market hospital specialist with deep operational focus, holding ~3--5% of global revenue.

Optum Advisory Services (2024--2025): Population health analytics, care management, and clinical integration reinforce the payer-owned advisory with proprietary data assets positioning, holding ~3--5% of global revenue. The company benefits from the structural data-monetization tail created by expanded value-based care adoption.

Parthenon (2024--2025): Transaction advisory, commercial due diligence, and health-system M&A reinforce the deal-focused advisory with growing health-sector practice positioning, holding ~2--4% of global revenue.

Future Outlook: 2026--2035

By 2030, precision digital health theranostics will become the operating system of healthcare consulting. The convergence of AI governance and algorithm-validation consulting will reshape the Healthcare Consulting Services Market through the late 2020s. By 2030, an estimated 40% of newly deployed clinical AI tools will undergo independent validation, bias-auditing, and regulatory-submission consulting, creating a diagnostic-advisory revenue loop. The FDA's emerging framework for AI/ML-based Software as a Medical Device has created a specialized consultancy niche for compliance that didn't exist five years ago.

Worldwide healthcare AI spending is expected to exceed USD 45 billion in 2030, and each deployment triggers downstream advisory needs around monitoring, re-training protocols, and liability frameworks. Machine-learning models that integrate genomic, proteomic, and operational biomarkers can recommend optimal sequencing of IT, strategy, and operations consulting for individual health systems. Start-ups have raised over USD 800 million in venture funding for healthcare decision-support tools since 2023.

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Larry Wilson

WantStats Research And Media Pvt. Ltd.

+1 855-661-4441

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