



Life Sciences BPO – Service Provider Profile Compendium 2017

Healthcare and Life Sciences BPS

Market Report – November 2017: Complimentary Abstract / Table of Contents

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Custom research capabilities

- Benchmarking | Pricing, delivery model, skill portfolio
- Peer analysis | Scope, sourcing models, locations
- Locations | Cost, skills, sustainability, portfolio – plus a tracking tool
- Tracking services | Service providers, locations, risk
- Other | Market intelligence, service provider capabilities, technologies, contract assessment

Subscription information

- The full report is included in the following subscription(s)
 - **Healthcare and Life Sciences BPS**
- In addition to published research, a subscription may include analyst inquiry, data cuts, and other services
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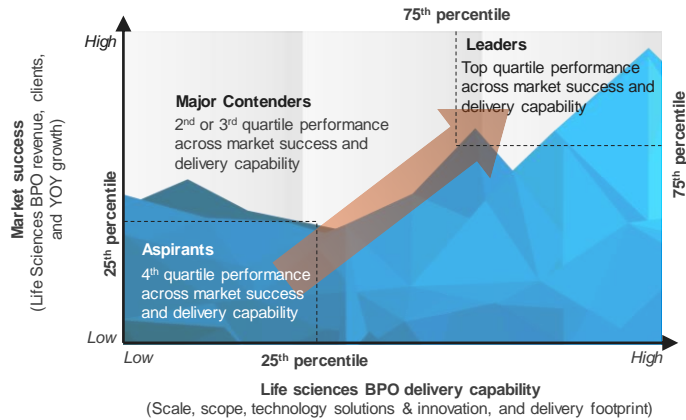
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This study offers four chapters/sections providing a deep dive into key offerings of 13 life sciences BPO service providers; below are four charts to illustrate the depth of the report

Everest Group PEAK Matrix™ for life sciences BPO



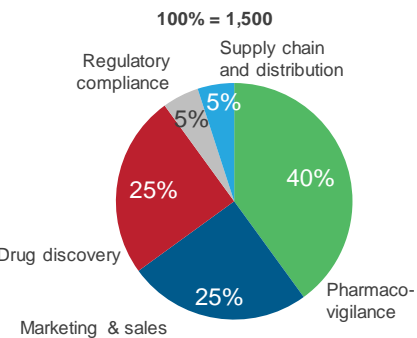
Capability assessment

Measure of capability: ● Best-in-class ● Very high ● High ● Medium high ● Medium ● Medium low ● Low ● Not mature

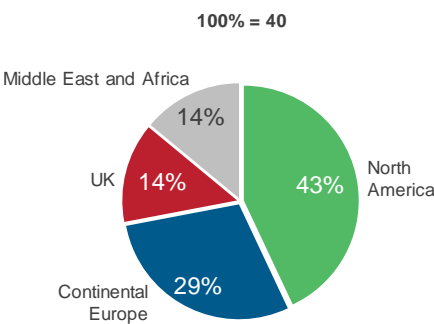
Service provider	Delivery capability					Market success
	Scale	Scope	Technology solutions and innovation	Delivery footprint	Overall	
Service provider 1	●	●	●	●	●	●
Service provider 2	●	●	●	●	●	●
Service provider 3	●	●	●	●	●	●
Service provider 4	●	●	●	●	●	●
Service provider 5	●	●	●	●	●	●
Service provider 6	●	●	●	●	●	●
Service provider 7	●	●	●	●	●	●
Service provider 8	●	●	●	●	●	●

Life sciences BPO FTE mix

Life sciences BPO FTE mix by segment



Life sciences BPO FTE mix by geography



Everest Group's remarks on service providers

Measure of capability: ● Best-in-class ● Very high ● High ● Medium high ● Medium ● Medium low ● Low ● Not mature

Delivery capability					Market success
Scale	Scope	Technology and Innovation	Delivery footprint	Overall	
●	●	●	●	●	●

Strengths

- With strong capabilities across the value chain, XYZ emerged as a Leader on the PEAK Matrix.
- It has extensive experience with life sciences clients across all three sections of the industry – abc, 123, and XYZ – which is further augmented by a strong blend of domain as well as functional expertise.
- Balanced mix of delivery centers present in offshore, nearshore, and onshore locations help it to deliver low cost solutions.
- It is investing in building platforms for the life sciences market (such as XYZ life sciences cloud for R&D platform which can collect, share, and analyze clinical data).
- Multiple acquisitions such as OBC, ABC, and UVW, in the digital space to significantly expand its digital offerings.
- Delivery centers across North America, Europe, Asia Pacific, and Latin America enable it to cater to a wide array of client requirements while benefiting from an optimal shoring mix.

Areas of improvement

- The life sciences market is witnessing consolidation of vendors by buyers; hence, XYZ should aim at becoming a strategic or preferred vendor for existing clients by leveraging its strong all-round capabilities.
- It can exploit its existing organizational presence across regions and functions to cross-sell and explore adjacencies in other service lines and emerging markets.

Source: Everest Group (year)

The Life sciences BPO profile report has 13 service provider profiles

XYZ | Life sciences BPO profile (page 1 of 2) Overview

Company profile: XYZ is an IT, BPO, and consulting services company catering to biotechnology, medical technology, and distribution & consumer health sectors, among others. XYZ's life sciences group provides end-to-end capabilities across strategy, consulting, and digital technology. Additionally, the company's life sciences business has operations around the globe.

- Key leaders**
- AAA, Chairman and Chief Executive Officer
 - BBB, Chief Financial Officer
 - CCC, Chief Operating Officer
 - DDD, Senior Managing Director, Global Life Sciences

Headquarters: ABC
Website: www.xyz.com

- Suite of services**
- Drug discovery, research, and pre-clinical/clinical trials
 - Marketing and sales
 - Supply chain and distribution
 - Pharmacovigilance
 - Regulatory compliance

	2014	2015	2016
Revenue (US\$ million) ¹	23	30	40
Number of FTEs	1000	1,200	1,500
Number of clients	7	10	14

- Recent acquisitions and partnerships**
- 2017: XXX...
 - 2017: XXX...

- Recent developments**
- 2017: YYY...
 - 2016: YYY...
 - 2016: YYY...

XYZ | Life sciences BPO profile (page 2 of 2) Capabilities and key clients



Note: Everest Group estimates as service provider did not participate in the research
Source: Everest Group (2017)

Research calendar – Healthcare and Life Sciences BPS

Published
 Planned
 Current release

Flagship reports

Release date

Healthcare Payer BPO Annual Report: Value-Based Sourcing Helping Payers Stay Afloat in an Era of Uncertainty	March 2017
Healthcare Payer BPO Service Provider Compendium 2017	April 2017
Life Sciences BPO Service Provider Landscape with PEAK™ Matrix Assessment	June 2017
Life Sciences BPO Annual Report	September 2017
Life Sciences BPO Service Provider Compendium 2017	November 2017
Healthcare Payer BPO Service Provider Landscape with PEAK™ Matrix Assessment	Q4 2017
Healthcare Provider BPO Service Provider Landscape with PEAK™ Matrix Assessment	Q4 2017

Thematic reports

Release date

Viewpoint – Wipro Bets Big on Healthcare through the HealthPlan Services Acquisition	February 2016
Viewpoint – Medicaid/Medicare Version 2.0: Exploring the Next Growth Wave in the Market	November 2016
Viewpoint – Will Big Pharma Heed the Call to Bring Jobs Home?	April 2017
Webinar Deck – Trump Cards: Driving Healthcare Innovation During Uncertainty	June 2017
Viewpoint – Innovation in Pharmacovigilance (PV): How to Spend Smarter Not Higher?	June 2017
Viewpoint – Rising Cost of Healthcare in the United States: Can Analytics Help?	August 2017
Viewpoint on Member Engagement of the Future	Q4 2017

Note: For a list of all HLS BPO reports published by us, please refer to our [website page](#)

Additional BPS research references

The following documents are recommended for additional insight into the topics covered in this report. The recommended documents either provide additional details on the topic or complementary content that may be of interest

1. **Life Sciences BPO – Annual Report 2017: Personalization Bug Biting the Market** ([EGR-2017-12-R-2348](#)); 2017. The global life sciences BPO market is expected to grow at a steady pace of 9-11% over 2016-2018. The life sciences industry continues to face existing challenges – increased competition from generics, declining margins, strengthening regulations, declining R&D profitability, end of blockbuster drugs & increasing number of approved personalized drugs, growing consumerism, tough macroeconomic conditions, and changing business models. However, adoption of solutions such as analytics, IoT, automation, and omnichannel marketing can help mitigate these challenges.
2. **Life Sciences BPO – Service Provider Landscape with PEAK Matrix™ Assessment 2017** ([EGR-2017-12-R-2223](#)); 2017. Life sciences industry is suffering from the dual danger of declining margins and rising competition from generic manufacturers, forcing them to look for solutions to grow efficiently. This report uses Everest Group's proprietary PEAK Matrix to assess and rate service providers on various dimensions of their capabilities. It also includes market share analysis of service providers and Everest Group's remarks on service providers highlighting their key strengths and development areas
3. **Innovation in Pharmacovigilance – How to Spend Smarter Not Higher** ([EGR-2017-12-V-2195](#)); 2017. Despite spending billions of dollars, lack of drug-related Adverse Event (AE) reporting and subsequent drug safety breaches continue to impact millions of lives and cause financial losses. Pouring more money at their Pharmacovigilance (PV) arms is no longer an efficient solution, so what can the pharmaceutical companies do to get out of this quagmire?
4. **Rising Cost of Healthcare in the United States** ([EGR-2017-10-V-2301](#)); 2017. The cost of healthcare in the United States is rising significantly as compared to other geographies. This has led both payers and providers to eat into each other's margin in the process of optimizing costs for their business. However, the efficient use of analytics can help them to significantly reduce these costs while achieving quality of care. This viewpoint talks about the potential of big data analytics in healthcare, the challenges faced by different segments of payers and providers in the industry, and probable solutions to those challenges in the short and long term

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