

Life Sciences Digital Services – Service Provider Compendium 2021

February 2021: Complimentary Abstract / Table of Contents



Our research offerings for global services

<ul style="list-style-type: none"> ▶ Market Vista™ Global services tracking across functions, sourcing models, locations, and service providers – industry tracking reports also available 	
<ul style="list-style-type: none"> ▶ Application Services 	<ul style="list-style-type: none"> ▶ Human Resources
<ul style="list-style-type: none"> ▶ BPS Banking & Financial Services 	<ul style="list-style-type: none"> ▶ ITS Banking & Financial Services
<ul style="list-style-type: none"> ▶ BPS Healthcare & Life Sciences 	<ul style="list-style-type: none"> ▶ ITS Healthcare
<ul style="list-style-type: none"> ▶ BPS Insurance 	<ul style="list-style-type: none"> ▶ ITS Insurance
<ul style="list-style-type: none"> ▶ Catalyst™ 	<ul style="list-style-type: none"> ▶ IT Services Executive Insights™
<ul style="list-style-type: none"> ▶ Cloud & Infrastructure 	<ul style="list-style-type: none"> ▶ ITS life Sciences
<ul style="list-style-type: none"> ▶ Customer Experience Management Services 	<ul style="list-style-type: none"> ▶ Locations Insider™
<ul style="list-style-type: none"> ▶ Data & Analytics 	<ul style="list-style-type: none"> ▶ PricePoint™
<ul style="list-style-type: none"> ▶ Digital Services 	<ul style="list-style-type: none"> ▶ Procurement
<ul style="list-style-type: none"> ▶ Engineering Services 	<ul style="list-style-type: none"> ▶ Recruitment & Talent Acquisition
<ul style="list-style-type: none"> ▶ Enterprise Platform Services 	<ul style="list-style-type: none"> ▶ Service Optimization Technologies
<ul style="list-style-type: none"> ▶ Finance & Accounting 	

Membership information

- This report is included in the following research program(s)
 - [Life Sciences IT Services \(ITS\)](#)
- If you want to learn whether your organization has a membership agreement or request information on pricing and membership options, please contact us at info@everestgrp.com

More about membership

In addition to a suite of published research, a membership may include

- Accelerators™
- Analyst access
- Data cuts
- Pinnacle Model® reports
- PriceBook
- Virtual Roundtables
- Workshops

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

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This report is based on four key sources of proprietary information

- Proprietary database of IT services contracts of major IT service providers and product vendors, with life science IT services in scope of work (updated annually)
- The database tracks the following elements of each contract:
 - Buyer details including size and signing region
 - Contract details including service provider, contract type, TCV & ACV, service provider FTEs, start & end dates, duration, and delivery locations
 - Scope details including share of individual buyer locations being served in each contract, Line of Business (LOB) served, and pricing model employed
- Proprietary database of IT service providers and product vendors (updated annually)
- The database tracks the following for each service provider / product vendor:
 - Revenue and number of FTEs
 - Number of clients
 - FTE split by different lines of business (LOBs)
 - Revenue split by region
 - Location and size of delivery centers
 - Technology solutions developed
- **Service provider and vendor briefings**
 - Vision and strategy
 - Annual performance and future outlook
 - Key strengths and improvement areas
 - Emerging areas of investment
- **Buyer reference interviews, ongoing buyer surveys, and interactions**
 - Drivers and challenges for adopting workplace services
 - Assessment of service provider performance
 - Emerging priorities
 - Lessons learnt and best practices

Service providers assessed



Source: **The source of all content is Everest Group unless otherwise specified**

Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any information we collect that is contract specific will only be presented back to the industry in an aggregated fashion

Background of the research

The Life Sciences (LS) industry has been at the forefront of the COVID-19 response, from carrying out drug trials and vaccine development to producing Personal Protective Equipment (PPE) and ventilators. The industry, which was already experiencing significant growth in digital technologies adoption, has been further pushed by the pandemic to adopt new and disruptive technologies to ensure business continuity. There is a historic surge in investment in digital services such as cybersecurity, cloud migration, virtual engagement models for clinical trials and sales and & marketing, and AI/ML for drug discovery. Digital transformation has become a strategic imperative for LS enterprises in a post-COVID-19 world, and they are looking for thought leaders and strategic partners that can help them on their transformation journeys.

To support enterprises on their digital journeys, service providers are ramping up capabilities by building industry-specific tools and accelerators and engaging in life sciences-specific partnerships and co-innovation initiatives. As the industry starts to recover, a key challenge for enterprises will be scaling up the digital initiatives and adopting a long-term digital strategy aligning business and IT goals. Everest Group's Life Sciences ITS research program analyzes service provider capabilities and their impact on the life sciences digital services market.

In this report, we analyze 27 IT service providers' digital capabilities specific to the life sciences sector globally. These service providers are mapped on the Everest Group PEAK Matrix®, a composite index of distinct metrics related to a provider's capability and market impact. We focus on:

- Assessment of service providers for life sciences digital services on several capability and market success-related dimensions
- Detailed profiles of each vendor, featuring their case studies and recent developments

Scope of this report:



Geography
Global

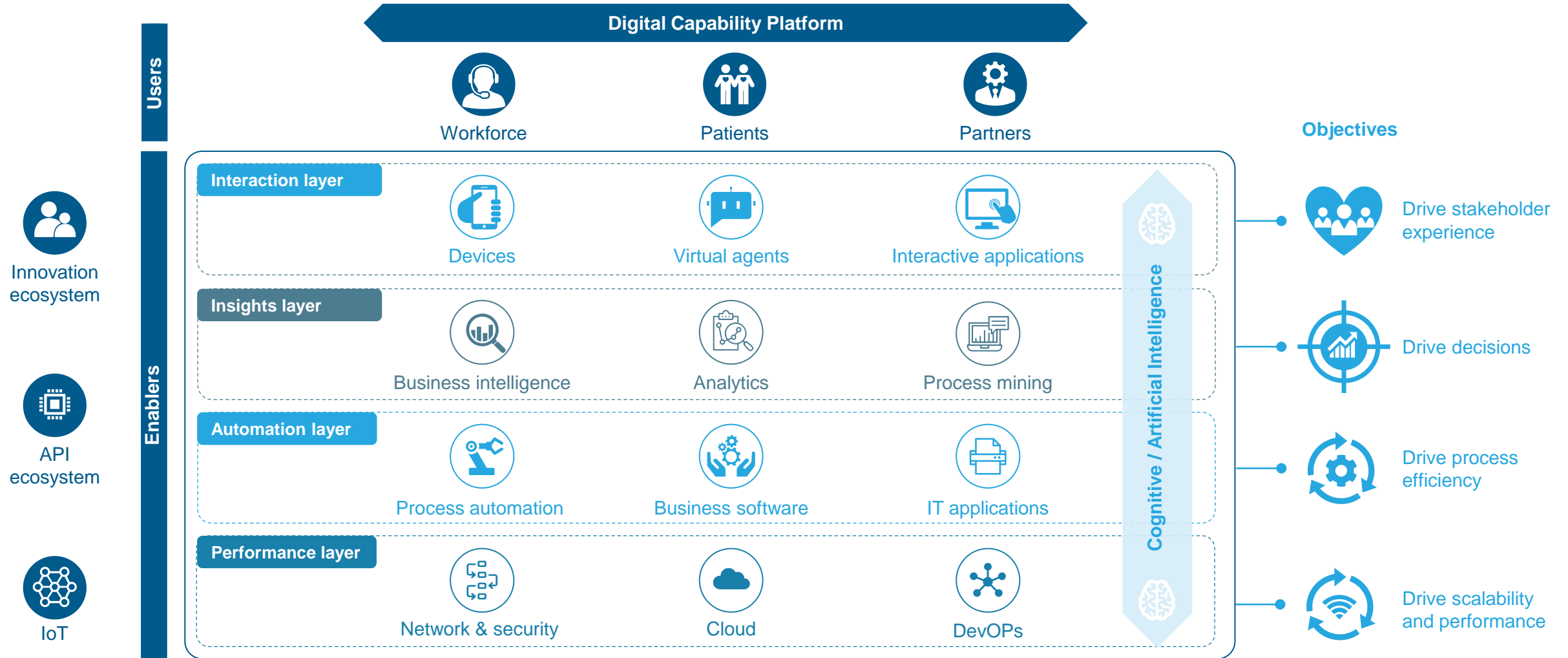


Industry
Life sciences
(biopharmaceuticals, medical
devices, and Contract Research
Organizations or CROs)



Service providers
Life sciences digital
services

Everest Group’s digital capability framework



Life sciences digital services | scope of the research

NOT EXHAUSTIVE



Drug discovery /
medical device product
development



Clinical and
pre-clinical trials



Manufacturing
operations



Sales and
marketing



Supply chain
and distribution

Digital use cases

- Streamlined and accurate clinical trials
- Patient privacy and data security
- Sales force optimization
- Patient matching and site selection
- Smart medical devices development
- Internal workflow management, collaboration and efficiency gains
- Self-diagnosis
- Accelerated drug molecule discovery
- Counterfeit reduction
- Supply chain optimization
- Automation in manufacturing

Digital technologies



RPA



Internet of
Things



Cognitive/AI



Blockchain



Analytics



Cloud



Social



Mobility



Digital
Cybersecurity

Life sciences digital services – service provider compendium covers detailed profiles of 27 service providers

Life Sciences Digital Services – Service Provider Compendium 2021

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Overview

Company mission/vision statement

XXX' vision for life sciences digital services is to create a more efficient and better end-to-end product development, marketing, and regulatory compliance service partnership and digital transformation to the table for life sciences companies digitally by focusing on operational excellence and business reinvention, while of data to change the life sciences landscape.

Overview of the client base

Helps leading life sciences organizations such as Philips, NHSX, and Centria life cycle of the product. XXX has successfully helped the top 10 global pharmaceutical manufacturers in key business challenges. It also partnered with Siemens for program. XXX engages with life sciences companies across North America, APAC, and MEA region.

Life sciences digital services revenue

<US\$50 million US\$50-150 million **US\$150-300 million** US\$300 million+

Scope of digital services

Analytics, AI/ML, big data, blockchain, cognitive computing, cloud, cybersecurity

1 All the revenue components add up to a total of 100%

Life Sciences Digital Services – Service Provider Compendium 2021

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Case studies and solutions

Case study 1

Intelligent supply chain and operations

Business challenge

An American multinational pharmaceutical corporation wanted to improve performance for its manufacturing plants and supply chain to better support the company's future goals

Case study 2

Digital solution to help patients & their care teams manage their health

Business challenge

An American multinational biotechnology company wanted a digital solution for its patients and their care teams to onboard for treatment throughout track the patient's journey

Life Sciences Digital Services – Service Provider Compendium 2021

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Digital frameworks and offerings

NOT EXHAUSTIVE

Life sciences digital frameworks (representative list)

Framework	Details
Solution 1	The framework allows deployment to algorithms in the HCP organization using EHR data
Solution 2	The framework allows companies in becoming more adept at embracing technological change
Solution 3	The framework allows digitalization of functions relating to quality control and quality assurance in manufacturing
Solution 4	The framework creates a blueprint of the next generation of supply chain to drive company's business in the future

Proprietary digital solutions (representative list)

Solution	Details
Solution 1	The product allows to design, prototype, build, and launch next-generation medical devices, platforms, and businesses
Solution 2	The platform allows improving the continuity and flow of data across life sciences enterprises, supporting the discovery, development, and delivery of treatments for patients
Solution 3	The product offers a real-time virtual representation of a potential or physical product, platform or ecosystem used to model, visualize, predict, and provide feedback on the properties and performance
Solution 4	Powered by data, analytics, and automation, the tool allows customer feedback to be included early and often in the development process for products that deliver a better customer experience

Research calendar

Life sciences IT services

■ Published
 ■ Planned
 ■ Current release

Flagship Life Sciences IT services reports

	Release date
Life Sciences Sales and Marketing Data & Analytics Services PEAK Matrix® Assessment 2020	December 2019
Life Sciences State of the Market Report – Trends, Service Provider Performance in 2019, and Outlook for 2020	February 2020
Medical Devices Digital Services PEAK Matrix® Assessment 2020	June 2020
Life Sciences Medical Devices Digital Services – State of the Market Report	July 2020
Life Sciences Medical Devices Digital Services – Service Provider Profiles Compendium	July 2020
Clinical Development Platforms – Vendor Landscape with Products PEAK Matrix® Assessment 2020	September 2020
Clinical Development Platforms – Vendor Provider Profiles Compendium	October 2020
Clinical Development Platforms Market Overview	November 2020
Life Sciences Digital Services – Service Provider Landscape with PEAK Matrix® Assessment 2021	December 2020
Life Sciences Digital Services – Service Provider Profiles Compendium	February 2021

Thematic Life Sciences IT services reports

	Release date
Effective Value-Based Contracting in Life Sciences	February 2020
Regulatory Overhaul of the EU Medical Device Market	April 2020
Future Readiness of Life Sciences Enterprise Supply Chains	June 2020
Insourcing in Life Sciences – The Quest for Talent Supremacy	Q1 2021
Intelligent Manufacturing for Life Sciences Enterprises	Q1 2021

Note: For a list of all of our published Life Sciences ITS reports, please refer to our [website page](#)



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