Life Sciences Smart Manufacturing Services PEAK Matrix® Assessment 2023

August 2023: Complimentary Abstract / Table of Contents

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Introduction

Historically, the traditional manufacturing industry was primarily focused on designing standardized manufacturing procedures and managing labor and mechanical systems, but with the emergence of Industry 4.0, technology adoption has become widespread across industries, unlocking numerous benefits. However, the life sciences industry has been slow in adopting technology to modernize manufacturing setups. Nevertheless, the pandemic, regulatory frameworks, and the urge to achieve operational excellence are now driving the adoption of smart manufacturing services.

Life sciences enterprises aim to unlock benefits such as cost optimization, increased productivity, visibility, and efficiency by investing in critical use cases, including digital twins, predictive maintenance, etc. They are also exploring high-growth opportunities such as sustainable manufacturing, batch-to-continuous manufacturing, and manufacturing of personalized medicines. As the industry experiences investments in smart manufacturing, service providers are taking on the role of end-to-end digital transformation partners by co-developing solutions to assist enterprises in their digital journeys.

In this research, we present an assessment of 16 life sciences service providers featured on the Life Sciences Smart Manufacturing Services PEAK Matrix®. The assessment is based on Everest Group's annual RFI process for the calendar year 2023, interactions with leading life sciences service providers, client reference checks, and an ongoing analysis of the life sciences smart manufacturing services market.

This report includes the profiles of the following 16 leading life sciences service providers featured on the Life Sciences Smart Manufacturing Services PEAK Matrix:

- **Leaders:** Accenture, Cognizant, Deloitte, HCLTech, and TCS
- **Major Contenders:** Capgemini, Tech Mahindra, LTIMindtree, Wipro, NTT DATA, Innova Solutions, Birlasoft, and Infosys
- **Aspirants:** Atos, HARMAN DTS, and NNIT

Scope of this report

Geography
Global

Industry
Life sciences
(biopharmaceuticals
and medical devices)

Services
Life sciences smart
manufacturing services

Overview and abbreviated summary of key messages

This report examines the 2023 life sciences smart manufacturing service provider landscape and its impact on the life sciences digital services market. It focuses on provider position and growth in the smart manufacturing market, changing market dynamics and emerging provider trends, assessment of provider delivery capabilities. It also identifies the key implications of the research findings for buyers and providers.

Some of the findings in this report, among others, are:

Life Sciences Smart Manufacturing Services PEAK Matrix®

Everest Group classified 16 life sciences smart manufacturing services providers on the Everest Group PEAK Matrix® Assessment into three categories of Leaders, Major Contenders, and Aspirants

- Leaders: There are five service providers in the Leaders category – Accenture, Cognizant, Deloitte, HCLTech, and TCS
- Major Contenders: The Major Contenders category has 8 service providers which comprises a varied mix of global MNCs, large & midsize firms, and life sciences specialists
- Aspirants: This category includes three service providers – Atos, HARMAN DTS, and NNIT
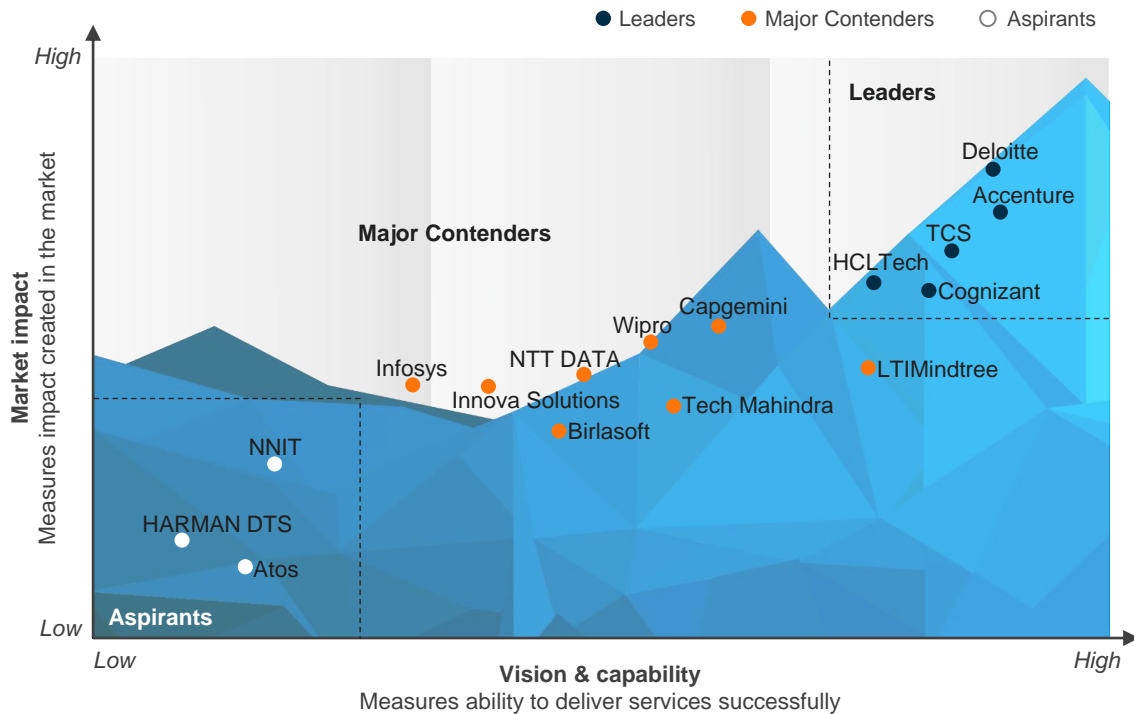
Service providers' delivery capabilities

- Leaders have positioned themselves as a digital transformation partner for enterprises with end-to-end capabilities, and a balanced breadth of offerings across the manufacturing value chain
- Major Contenders comprise a varied mix of midsize and large firms having a relatively less balanced portfolio, and inclined toward a specialization in certain specific areas of the value chain
- Aspirants have more focus on leveraging horizontal capabilities to cater to the needs of life sciences manufacturing enterprises over developing domain-specific IP or services through CoEs and strategic alliances

Demand drivers

- Amid global disruptions and the post-pandemic scenario, enterprises have shown an inclination towards enhancing productivity and reducing cost pressures by adopting more mature use cases around predictive analytics, digital twins, and quality improvement
- Growth is also being driven by the interest of a few large enterprises in investing in emerging use cases centered around specialty drug manufacturing, sustainable manufacturing, and the transition from batch to continuous manufacturing

This study offers three distinct chapters providing a deep dive into key aspects of life sciences smart manufacturing services market; below are three charts to illustrate the depth of the report

Life Sciences Smart Manufacturing Services PEAK Matrix® Assessment 2023[1,2,3]

Illustrative example

● Leaders ● Major Contenders ○ Aspirants

Market impact — Measures impact created in the market (vertical axis, Low to High)

Vision & capability — Measures ability to deliver services successfully (horizontal axis, Low to High)

Leaders: Deloitte, Accenture, TCS, HCLTech, Cognizant

Major Contenders: Capgemini, Wipro, NTT DATA, Infosys, Innova Solutions, Birlasoft, Tech Mahindra, LTIMindtree

Aspirants: NNIT, HARMAN DTS, Atos

1 Assessments for Atos, Capgemini, Infosys, and NTT DATA exclude provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with enterprise buyers
2 Assessment for Birlasoft, HARMAN DTS, and NNIT is based on partial primary inputs (briefings only)
3 The assessment of Atos is completed prior to its acquisition by Eviden
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
Source: Everest Group (2023)

Capability assessment

Illustrative example

Measure of capability: ◐ Low ● High

Providers	Market impact				Vision & capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
Provider 1	◕	◔	◕	◕	◕	◔	◔	◔	◐
Provider 2	◔	◐	◐	◔	◔	◐	◕	◐	◔
Provider 3	◔	◕	◕	◕	◕	◕	◐	◔	◔
Provider 4	◔	◕	◕	◕	●	◔	◐	◕	◕
Provider 5	◐	◔	◐	◕	◐	◕	◐	◐	◔
Provider 6	◕	◐	◕	◐	◕	◐	◕	◐	◐
Provider 7	◐	◐	◐	◐	◐	◐	●	◕	◔
Provider 8	◕	◔	◕	◐	◐	◔	◐	◐	◔
Provider 9	◔	◔	◐	◐	◔	◐	◐	◐	◔

Everest Group's remarks on providers

Illustrative example

Measure of capability: ◐ Low ● High

Market impact				Vision & capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
◔	◔	●	◕	◕	◔	◕	◕	◕

Strengths

● Provider has expertise in procurement, logistics, and quality part of smart manufacturing, which is also complemented by its pool of IP and robust partnerships
● Clients have highlighted its technical expertise and the quality of the talent it brings on board, aligned accurately with the demand of the project

Limitations

● It should look to leverage market opportunities and scale up in the UK, Europe, and APAC regions
● It should augment its cybersecurity capabilities by partnering with niche verticalized players and develop joint go-to-market strategies to take solutions to the relevant buyers
● It should develop smart manufacturing specific CoEs and thought leadership to promote innovation centered around emerging demand trends leveraging technologies including IoT, 5G, etc.

Research calendar
Life Sciences Information Technology

Reports title	Release date
Decentralized Clinical Trial Platforms PEAK Matrix® Assessment 2023	November 2022
Decentralized Clinical Trial Platforms Provider Compendium 2023	December 2022
Life Sciences Decentralized Clinical Trial Platforms State of the Market 2023	March 2023
Medical Devices Digital Services PEAK Matrix® Assessment 2023	May 2023
Medical Devices Digital Service – Provider Profiles Compendium	May 2023
Life Sciences IT Services – State of the Market	June 2023
Life Sciences Smart Manufacturing Services PEAK Matrix® Assessment 2023	**August 2023**
High Performance Computing in Drug Discovery	Q3 2023
Life Sciences Commercial Technology – State of the Market 2023	Q3 2023
Reaping Success from End-to-End Clinical Development Platforms	Q3 2023
Life Sciences Next-gen Customer Engagement Platform PEAK Matrix® Assessment 2023	Q3 2023
Life Sciences Services Specialists PEAK Matrix® Assessment 2023	Q3 2023
Future of Hybrid Commercial Model – Orchestrating Hyper-personalized Customer Journeys	Q3 2023
First Step for Hyper-personalization – Unlocking the Value of Dynamic Customer Personas	Q3 2023
Life Sciences Supply Chain Visibility Trailblazers	Q3 2023

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