

Life Sciences Smart Manufacturing Services – Provider Compendium 2023

October 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 the full report, we present an assessment of 16 life sciences service providers featured on the [Life Sciences Smart Manufacturing Services PEAK Matrix® Assessment 2023](#). 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.

The full 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

The Life Sciences Smart Manufacturing Services – Provider Compendium report has over 16 provider profiles/buyer case studies/architecture of the survey questionnaire, etc.

Life Sciences Smart Manufacturing Services – Provider Compendium 2023

Provider profile (page 1 of 6) Overview

Company mission
 Provider partners with life sciences enterprises in reimagining reliable and efficient supply of affordable and accessible therapies resulting in enhanced patient well-being. It supports clients in life sciences manufacturing into the next generation of digital evolv investments in expanding global smart manufacturing capabilities, proprietary IP-based assets, leveraging smart factory technology.

Overview of the client base
 Among its diverse customer base, Provider engages with the top 10 largest biotech enterprises, 9 out of the top 10 medical sciences enterprises.

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

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Life Sciences Smart Manufacturing Services – Provider Compendium 2023

Provider profile (page 2 of 6) Case studies

Case study 1 Transformation of Quality Management manufacturer

Business challenge
 The client faced challenges with high costs of quality and repeat basic and disconnected platforms for quality processes, lacking the client identified a QMS platform and set ambitious timelines (QSEs) across more than five sites.

Solution
 Provider assisted the client in their QMS transformation journey conducting process design. Additionally, it built solutions tailored customization with next-gen functionalities, performed detailed the change management process through a training program.

Impact

- Assisted clients realize benefits worth US\$ 30 million by eliminating overhead expenses
- Deployed more than 10 QSEs in 14 months across five manufacturing sites
- Ensured QMS process adoption for more than 700 employees

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Life Sciences Smart Manufacturing Services – Provider Compendium 2023

Provider profile (page 3 of 6) Offerings

Smart manufacturing services consulting frameworks used

Framework	Details
XYZ	It is an end-to-end manufacturing
XYZ	It has the capabilities
XYZ	It is an application
XYZ	It is a cloud-based product quality
XYZ	It is a suite of
XYZ	It is a SaaS based
XYZ	A decarbonization abatement platform
XYZ	It is an IoT-based Systems (EM)
XYZ	It is a preconfigured Product Lifecycle dashboard, etc.

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Life Sciences Smart Manufacturing Services – Provider Compendium 2023

Provider profile (page 4 of 6) Offerings

Proprietary smart manufacturing solutions – such as IP, patents, etc.

Solution	Details
XYZ	It enables enterprise visualizations,
XYZ	A platform solution for visualizations & serialization, etc.
XYZ	It is an end-to-end performance, etc.

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Life Sciences Smart Manufacturing Services – Provider Compendium 2023

Provider profile (page 5 of 6) Recent developments

Key events – related to smart manufacturing services (proprietary)

Event name	Type of event	Year	Details
XYZ	Alliance	2023	A multi-frame
XYZ	Acquisition	2022	Acquired advanced
XYZ	Acquisition	2022	Acquired and off
XYZ	Acquisition	2022	Acquired product
XYZ	Investment	2022	The strategic cyber/innovation
XYZ	Alliance	2021	Alliance and su
XYZ	Acquisition	2021	Acquired
XYZ	Acquisition	2021	Acquired
XYZ	Alliance	2020	Alliance deploy
XYZ	Alliance	2020	Alliance capab
XYZ	Acquisition	2019	Acquired

NOT EXHAUSTIVE

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Life Sciences Smart Manufacturing Services – Provider Compendium 2023

Provider (page 6 of 6) Everest Group assessment – Leader

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 made substantial investments in developing manufacturing solutions throughout the life sciences value chain, focusing on futuristic domain use cases such as cell and gene therapy manufacturing and sustainable manufacturing. It is further reinforced by its dedicated investments in building the xyz smart factory, which strengthens its capabilities in IoT, cybersecurity, digital twins, robotics, etc.
- While clients highlight the premium pricing points, they acknowledge the innovative commercial constructs offered by provider and perceive the dollar value per service provided to be better compared to peers
- Clients view provider as a reliable strategic partner as it addresses both the existing and emerging business problems, even by engaging third-party providers if necessary
- Clients appreciate the high quality of the talent deployed and the strong technical domain knowledge they possess

Limitations

- Although clients appreciate the technical and domain expertise of the talent deployed, they expect better attrition management to ensure seamless project delivery
- Provider's tendency to consistently agree with clients without conducting thorough evaluations can reveal a lack of critical assessment and hinder their ability to make decisions that align with the enterprise's expertise and best interests
- While clients appreciate provider's strategic inputs, they look for better transparency and alignment with the enterprise stakeholders

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Research calendar

Life Sciences Information Technology

Published Planned Current release

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 Services – Provider Compendium 2023	May 2023
Life Sciences IT Services – State of the Market	June 2023
Life Sciences Smart Manufacturing Services PEAK Matrix® Assessment 2023	September 2023
Life Sciences Smart Manufacturing Services – Provider Compendium 2023	October 2023
High Performance Computing in Drug Discovery	Q4 2023
Life Sciences Commercial Technology – State of the Market	Q4 2023
Life Sciences Next-gen Customer Engagement Platform PEAK Matrix® Assessment 2023	Q4 2023
Life Sciences Services Specialists PEAK Matrix® Assessment 2023	Q4 2023
Future of Hybrid Commercial Model – Orchestrating Hyper-personalized Customer Journeys	Q4 2023
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