

Life Sciences Digital Services Specialists – Provider Compendium 2024

March 2024: Complimentary Abstract / Table of Contents



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Background of the research

As life sciences enterprises adapt to post-COVID market, factors such as global macroeconomic uncertainties, geopolitical disruptions have also forced biopharmaceutical and medical devices enterprises to rethink their future growth strategy. As these enterprises rationalize and restructure their portfolios and strategically address the high-priority "quick-wins" use cases for digital transformation, they look at service providers with greater domain knowledge, better agility and life-sciences specific technical expertise. The post-pandemic era is currently witnessing the emergence of these niche providers who are establishing a strong foothold in the digital services market.

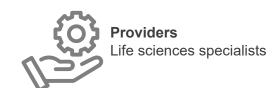
In this research, we present an assessment and detailed profiles of 16 service providers featured on the Life Sciences Digital Services Specialists PEAK Matrix[®]. Each provider profile provides a comprehensive picture of its service focus, key Intellectual Property (IP) / solutions, domain investments, and case studies. The assessment is based on Everest Group's annual RFI process for calendar year 2023, interactions with leading life sciences digital service providers, client reference checks, and an ongoing analysis of the life sciences digital services market.

This report includes the profiles of the following 16 leading life sciences digital services specialist providers featured on the Life Sciences Digital Services Specialists PEAK Matrix:

- Leaders: Axtria, Indegene, NNIT, Zifo, and ZS
- Major Contenders: Avira Digital, DataZymes, Excelra, i2e Consulting, Quantori, Real Chemistry, and Trinity Life Sciences
- Aspirants: Beghou Consulting, EZEN, KMK Consulting, and ProcDNA

Scope of this report







Overview and abbreviated summary of key messages

This report examines the global 2023 life sciences digital services specialist provider landscape and its impact on the life sciences digital services market. It focuses on provider position and growth in the specialist provider market, changing market dynamics and emerging provider trends, assessment of provider delivery capabilities, and key specialist provider profiles. 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 Digital Services Specialists PEAK Matrix® Assessment 2024

Everest Group classified 16 life sciences digital services specialist providers on the Everest Group PEAK Matrix into the three categories of Leaders, Major Contenders, and Aspirants. The PEAK Matrix is a framework to assess the overall vision, capability, and market impact of platform providers.

- There are five life sciences digital services specialist providers in the Leaders category Axtria, Indegene, NNIT, Zifo, and ZS
- The Major Contenders category has seven life sciences digital services specialist providers Avira Digital, DataZymes, Excelra, i2e Consulting, Quantori, Real Chemistry, and Trinity Life Sciences
- There are four life sciences digital services specialist providers in the Aspirants category Beghou Consulting, EZEN, KMK Consulting, and ProcDNA

Specialist digital service provider trends

We see three major segments of specialist service providers based on their capabilities in the life sciences digital services space:

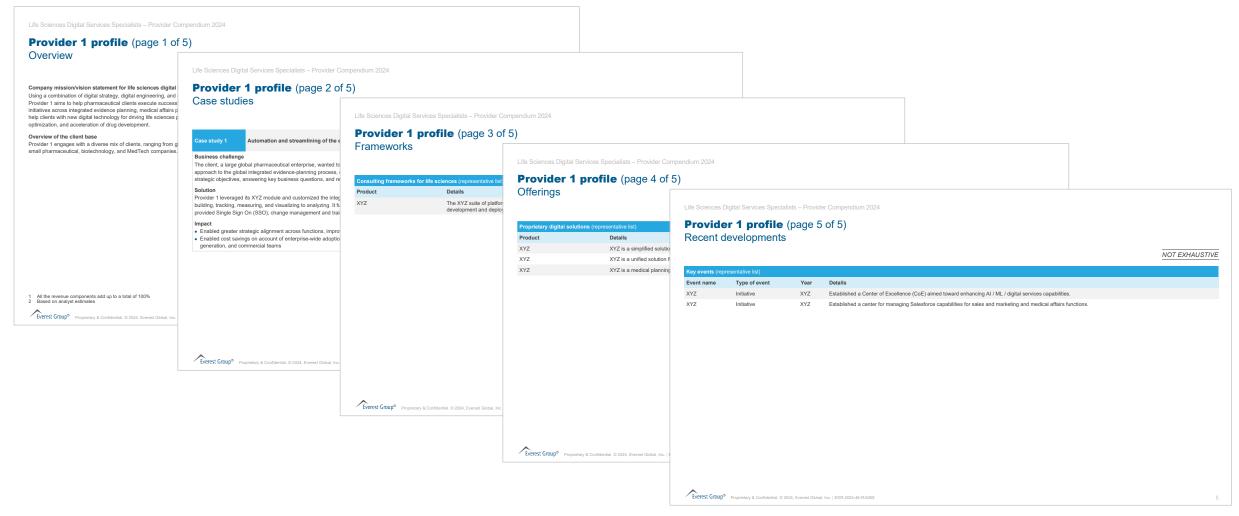
- Research and development: Their portfolio of offerings comprises application-specific services and platform-led services; and prominent use cases
 around analysis of omics-datasets, protein binding prediction, trial feasibility using RWE, etc.. They specialize in providing domain-specific data and
 analytics offerings across discovery and research, drug and product development
- Commercial: These specialists offer strong domain expertise across the commercial function with coverage across sales and marketing, medical affairs,
 market access, and patient services. They leverage technologies such as Gen AI, analytics, ML to offer solutions across conversational AI, HCP
 segmentation, and patient advertising strategy

Specialists' unique proposition

Through their unique value propositions, the specialists have been able to carve out a niche for themselves and grow from there:

- Domain expertise along with niche services and solutions
- Engagement flexibility and superlative client management

The Life Sciences Digital Services Specialists Provider Compendium report has 16 provider profiles/buyer case studies/architecture of the survey questionnaire, etc.



Research calendar

Life sciences information technology

	Published	Planned	Current release	
Reports title			Release date	
Medical Devices Digital Services PEAK Matrix® Assessment 2023			May 2023	
Life Sciences Smart Manufacturing Services PEAK Matrix® Assessment 2023			August 2023	
Life Sciences Smart Manufacturing Services – Provider Compendium 2023			October 2023	
Life Sciences Next-generation Customer Engagement Platforms (CEP) PEAK Matrix® Assessment 2023			November 2023	
Life Sciences Next-generation Customer Engagement Platforms (CEP) – Provider Compendium 2023			December 2023	
Life Sciences Digital Services Specialists PEAK Matrix® Assessment 2024			January 2024	
Life Sciences Digital Services Specialists – Provider Compendium 2024			March 2024	
Life Sciences Customer Experience Platform (CXP) Adoption Playbook			Q1 2024	
Life Sciences Supply Chain Visibility Trailblazers			Q1 2024	
Life Sciences Digital Services for Mid-market Enterprises – Provider Compendium 2024			Q2 2024	
Life Sciences Next-generation Customer Engagement Platforms (CEP) PEAK Matrix® Assessment 2024			Q2 2024	
Life Sciences Enterprise Platform Services PEAK Matrix® Assessment 2024			Q2 2024	
Life Sciences Commercial Technology Trailblazers			Q3 2024	

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