

Life Sciences Digital Services Specialists – Provider Compendium 2024

March 2024: Complimentary Abstract / Table of Contents



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- ▶ Supply Chain Management (SCM) Services
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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:** Atria, 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



Geography
Global



Providers
Life sciences specialists



Services
Digital services

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.

Life Sciences Digital Services Specialists – Provider Compendium 2024

Provider 1 profile (page 1 of 5)

Overview

Company mission/vision statement for life sciences digital
Using a combination of digital strategy, digital engineering, and Provider 1 aims to help pharmaceutical clients execute success initiatives across integrated evidence planning, medical affairs p help clients with new digital technology for driving life sciences p optimization, and acceleration of drug development.

Overview of the client base
Provider 1 engages with a diverse mix of clients, ranging from g small pharmaceutical, biotechnology, and MedTech companies.

1 All the revenue components add up to a total of 100%
2 Based on analyst estimates

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Life Sciences Digital Services Specialists – Provider Compendium 2024

Provider 1 profile (page 2 of 5)

Case studies

Case study 1 Automation and streamlining of the e

Business challenge
The client, a large global pharmaceutical enterprise, wanted to approach to the global integrated evidence-planning process, i strategic objectives, answering key business questions, and re

Solution
Provider 1 leveraged its XYZ module and customized the integ building, tracking, measuring, and visualizing to analyzing. It fu provided Single Sign On (SSO), change management and trail

Impact

- Enabled greater strategic alignment across functions, impro
- Enabled cost savings on account of enterprise-wide adoptio generation, and commercial teams

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Life Sciences Digital Services Specialists – Provider Compendium 2024

Provider 1 profile (page 3 of 5)

Frameworks

Consulting frameworks for life sciences (representative list)

Product	Details
XYZ	The XYZ suite of platform development and deplo

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Life Sciences Digital Services Specialists – Provider Compendium 2024

Provider 1 profile (page 4 of 5)

Offerings

Proprietary digital solutions (representative list)

Product	Details
XYZ	XYZ is a simplified solutio
XYZ	XYZ is a unified solution f
XYZ	XYZ is a medical planning

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Provider 1 profile (page 5 of 5)

Recent developments

NOT EXHAUSTIVE

Key events (representative list)

Event name	Type of event	Year	Details
XYZ	Initiative	XYZ	Established a Center of Excellence (CoE) aimed toward enhancing AI / ML / digital services capabilities.
XYZ	Initiative	XYZ	Established a center for managing Salesforce capabilities for sales and marketing and medical affairs functions.

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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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