

Everest Group PEAK Matrix[®] for Life Sciences Digital Service Providers 2021

Focus on Wipro
February 2021



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:

- Digital services market trends for life sciences
- The landscape of service providers for life sciences digital services
- Assessment of service providers on several capability- and market success-related dimensions

Scope of this report:



Geography
Global



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



Service providers
Life sciences digital services

Life sciences digital services – services PEAK Matrix® characteristics

Leaders:

Accenture, Capgemini, Cognizant, HCL Technologies, TCS, and Wipro

- Leaders have established themselves as front runners to support large life sciences customers that prefer service providers to help them achieve transformation through digital initiatives
- These players have balanced portfolios, are able to come up with innovative digital use-cases for life sciences firms, and continue to keep pace with the market dynamics through continued investments in technology and services capability development (internal IP/tools, M&A, partnerships, etc.)
- Leaders have showcased high levels of proactiveness in taking their innovations and next-generation service offerings to clients
- That said, the current Leaders face a stiff challenge from progressive Major Contenders in terms of both digital services capabilities and commercials. Hence, they need to focus on building effective solutions that leverage next-generation technology trends and also address the cost-takeout mandate

Major Contenders:

Atos, Birlasoft, CGI, Deloitte, DXC Technology, Genpact, HARMAN Connected Services, IBM, Indegene, Infosys, LTI, NNIT, NTT DATA, Stefanini, Tech Mahindra, and Virtusa

- The Major Contenders segment comprises a varied mix of global MNCs, large- & mid-sized firms, and life sciences specialists
- While some have built meaningful capabilities to deliver a wide range of digital services across the life sciences LoBs and value chain, others focus on differentiating by specializing in specific areas within the life sciences domain
- The service portfolios of Major Contenders are not as balanced as compared to Leaders, and also tend to be less comprehensive in value chain coverage
- However, these players are offering the Leaders stiff competition by making high-profile investments and meaningful partnerships around digital offerings
- For such players, an opportunity lies in engaging small and medium-sized buyers, especially since this market segment has not been addressed meaningfully by Leader

Aspirants:

CitiusTech, EPAM, Fujitsu, Hexaware, and Infostretch

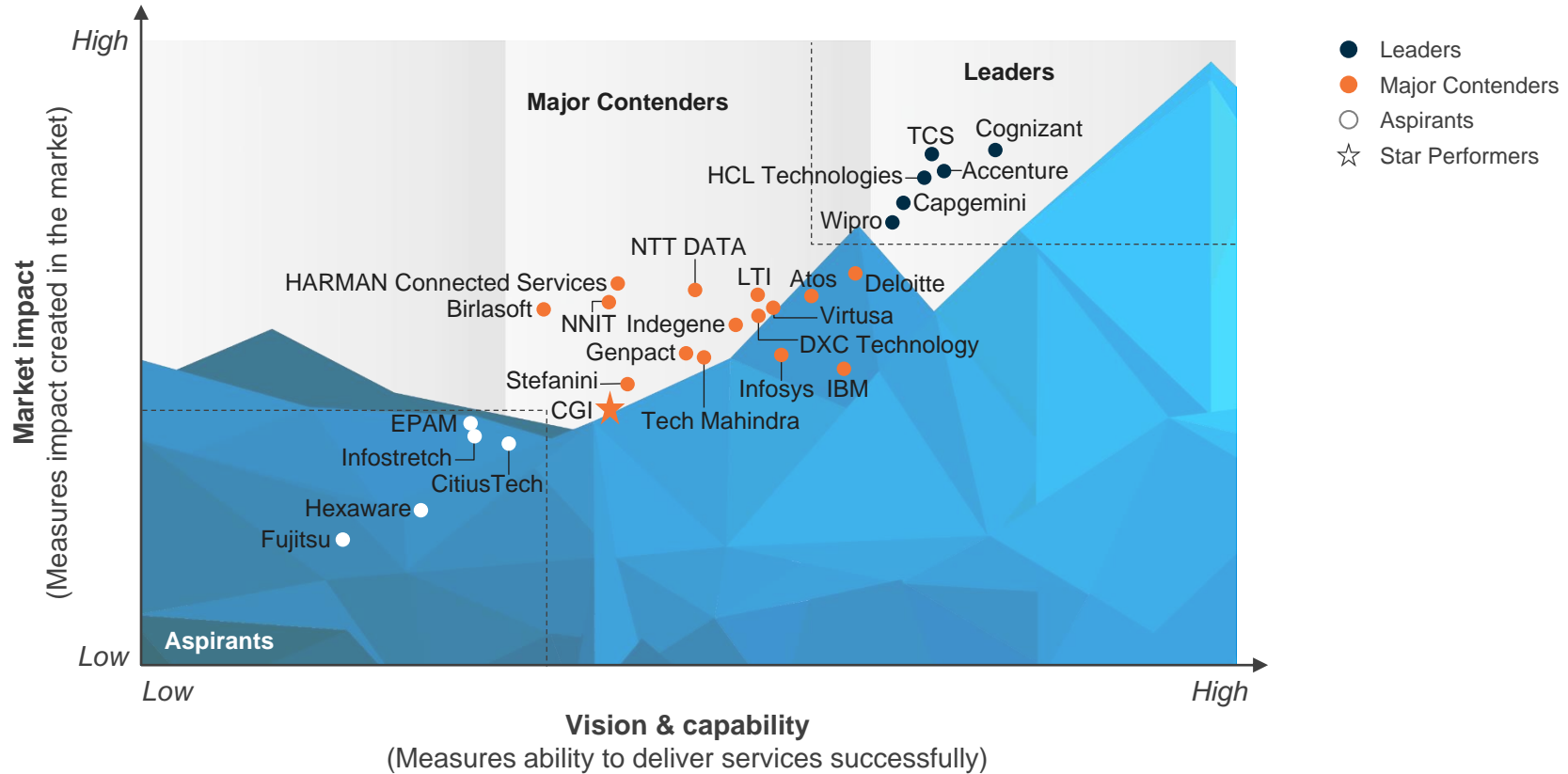
- Aspirants are majorly focused on mid-sized clients with limited presence in large and very large accounts
- Players such as Infostretch and CitiusTech have built in-house accelerators and products to grow their life sciences businesses but further need to build thought leadership and consulting capabilities to compete with major contenders
- Aspirants are increasing their investments in CoEs and strategic partnerships to build expertise in next-generation technologies but currently lack concrete proof points to gain client confidence

Everest Group PEAK Matrix®

Life Sciences Digital Services PEAK Matrix® Assessment 2021 | Wipro positioned as Leader



Everest Group Life Sciences Digital Services PEAK Matrix® Assessment 2021^{1,2}



1 PEAK Matrix specific to life sciences digital services










2 Assessments for CitiusTech, Deloitte, EPAM, Fujitsu, Hexaware, IBM, and Infosys exclude service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interactions with life sciences firms that are buyers of digital services

Source: Everest Group (2020)

Wipro | Life sciences digital services profile (page 1 of 7)

Everest Group assessment – Leader

Measure of capability:  High  Low

Market impact				Vision & capability				
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services	Innovation & investments	Delivery Footprint	Overall
								

Strengths

- Wipro has well-recognized solutions and services covering all areas of the value chain, with accelerators and IP (e.g., Wipro Medibot, Talosafe) to optimize time-to-value
- It has invested in building innovation labs, vertical-specific CoEs, and partnerships to expand its service delivery capabilities in data analytics, AI, and the cloud (e.g., ComplianceQuest, Tarang Labs, and partnerships with Medidata and AiCure)
- It is reskilling and upskilling resources through domain-specific certifications and technical training in high-growth areas such as IoT
- Clients appreciate its experience in handling large-scale transformation projects, flexibility to scale resources rapidly, and the ability to deliver projects within a reasonable time

Areas of improvement

- It should expand vertical-specific solutions in manufacturing and sales and marketing, given the increased demand for contextualized digital services
- Clients feel that Wipro takes a strong technology-led, execution-focused approach; it should proactively showcase domain expertise and consulting capabilities to serve clients on complex transformational engagements
- Clients have highlighted the need for proactiveness in prescribing effective technology solutions to their business problems

Wipro | Life sciences digital services profile (page 2 of 7)

Overview

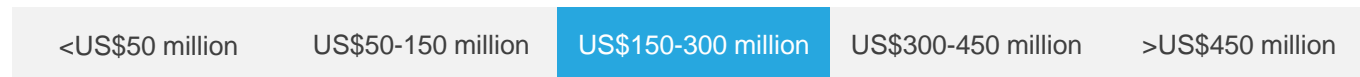
Company mission/vision statement

Wipro's vision is to be the innovation partner of choice in discovery, development, and delivery of novel therapies by designing the new care continuum for healthcare globally. The company unifies fragmented R&D, clinical, and commercial sales and marketing systems, and generates data insights from patients, providers, and devices. The main objective is to help its clients make supply chains more efficient and contain the cost of regulatory compliance, while extracting insights in each of these areas to grow business profitability.

Overview of the client base

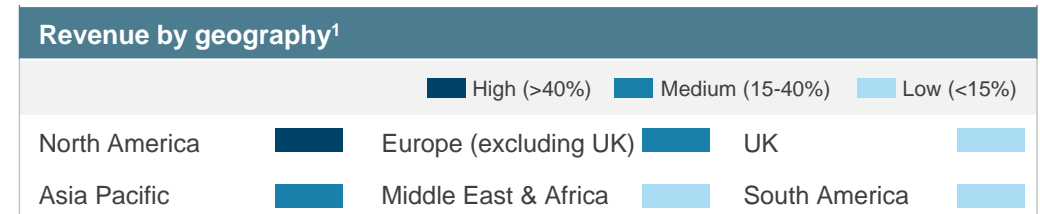
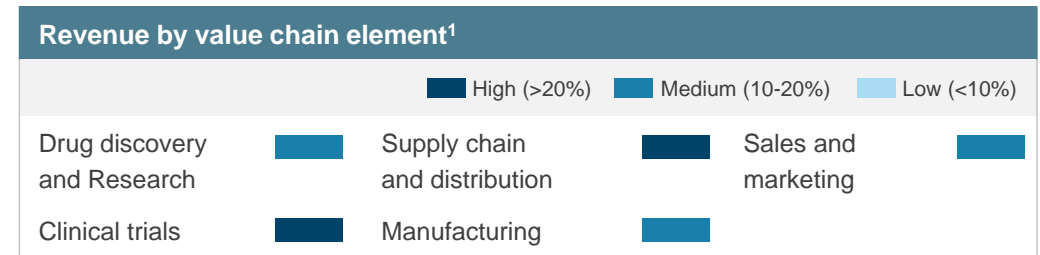
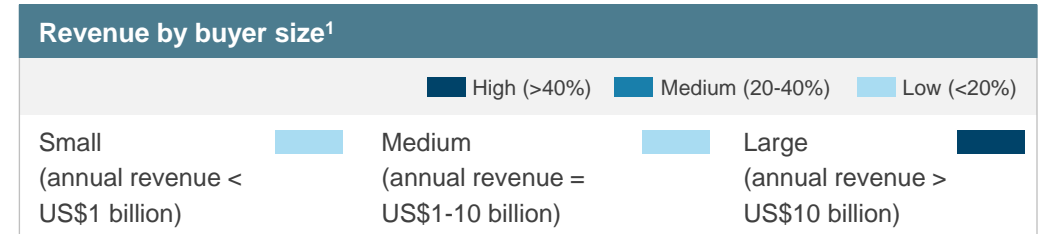
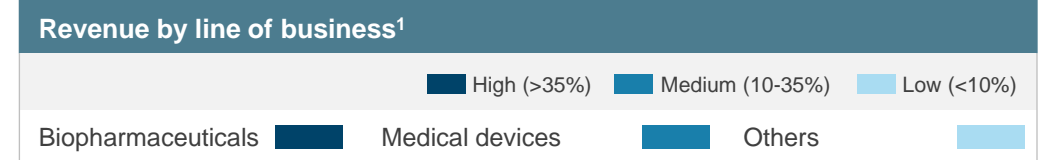
Wipro is a partner to nine of the top 10 medical device manufacturers including large multinational medical device companies focused on medical discovery, diagnostics, and care for over a century. It is also engaged with eight of the top 10 pharma companies and two of the top three generics with clients such as large multinational pharmaceutical and biotech companies focused on patient-driven and value-based R&D. The company also serves diagnostic companies and laboratories focused on delivering insights that identify and treat diseases for better healthcare management.

Life sciences digital services revenue



Scope of digital services

Big data and analytics, blockchain, cloud, cognitive computing, data integration from multiple sources including IoT devices, mobility, social, and digital UX



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

Wipro | Life sciences digital services profile (page 3 of 7)

Case studies and solutions

NOT EXHAUSTIVE

Case study 1	Seamless global launch of pharmaceutical products	
	Business challenge One of the largest global pharmaceutical organizations wanted an e-commerce system that could be launched for multiple countries in a limited time. The client wanted to create a solution architecture, design the process, build the implementation strategy, provide testing, and support the commerce platform.	Solution and impact Wipro built end-to-end architecture and processes to achieve digitization to migrate manual and offline tracking to a digital solution on share point and process reengineering of inventory management to introduce tool-based integration that works seamlessly between ticketing tool and inventory database. It also designed auto- decommissioning to build processes capable of identifying active/inactive users and take timely action to deactivate users from careers saving additional charges. The self-service of orders enabled reduction of 90% of calls to place orders. It helped increase the customer base by 50% in one country and implemented cross-sell and upsell of products.
Case study 2	Overcome challenges in cardiac implant monitoring	
	Business challenge One of the leading medical technology firms based out of the US faced obsolescence issues with their legacy cardiac implant monitor. The client needed help to define the roadmap in overcoming component and technology obsolescence, in addition to lowering the overall Bill of Material (BOM) cost of the product.	Solution and impact Wipro delivered a new design for the cardiac implant monitor that helped overcome technology obsolescence, adopt latest communication technologies (BT, Wi-Fi), and yet lower the overall BOM through an innovative business model for ASIC design and development. Overcoming technology obsolescence helped the client in retaining and growing the patient base. Ease of use helped patient adherence, resulting in improved health outcomes (>25%) and reduced the overall BOM cost by 50%.

Wipro | Life sciences digital services profile (page 4 of 7)

Digital frameworks

NOT EXHAUSTIVE

Life sciences digital frameworks (representative list)

Solution	Details
Business Enablement Lab (BEL)	The framework comprises a small team to drive business outcomes across four dimensions – Customers, Revenue, Operational Efficiency, and People and Partners (CROP). The lab comprises a mix of business strategists and AI / data science SMEs, who leverage the “ideation to prototype to production” methodology
Digital Maturity Assessment(DMA)	A framework that ascertains digital transformational readiness from the technology, process, and organizational perspective, providing a 360-degree view of the-current digital maturity. It consists of the following three aspects: <ul style="list-style-type: none">• Assessment of existing technology, process, organizational estate, and tailor-made questionnaire framework• Application for assessing digital maturity by experts based on the inputs gathered• Categorization of output to segregate the digital maturity, segments, and organization-wide recommendations for digital strategy

Wipro | Life sciences digital services profile (page 5 of 7)

Offerings

NOT EXHAUSTIVE

Proprietary digital solutions (representative list)

Solution	Details
Collaborative care platform	A digital health platform that connects all stakeholders including patients, healthcare providers, and pharmacists. The platform delivers in-patient engagement, patient progress tracking, motivating patients through care giver connect, and providing content and services to support patient's adherence. The platform is designed by identifying common care issues including gaps in care, comorbidities, and behavioral issues
Digital Integrated Clinical Enterprise (DICE)	A cloud-based unified platform to transform and accelerate clinical research by enabling faster availability of high-quality clinical data to make quicker decisions. The platform offers digital solutions in the space of electronic data capture, electronic health records, clinical trial planning, clinical trial management, and clinical trial analytics
Investigator Relationship Management (IRM)	Founded on customer relationship management principles, IRM portal acts as a single resource for investigators, sites, and other site staff to have real-time visibility of the study
Molecule 360 predictive analytics platform	The platform helps researchers identify the master and cluster molecules. The real-time analysis of molecule and genome data offers several benefits such as linking clusters based on intelligence and business rules, automatic scan of pathways to identify cellular impact of mutations, design drugs based on proteins and RNA molecules, and biomarker analysis to identify relevant loci in disorders and stimulate drug development
Paperless QC labs	The framework helps organizations build, optimize, automate, and manage paperless QC labs and get away from paper records. This results in reduced testing and review time
Remote solutions	Enable business applications to talk directly with different medical devices across geographies, which results in predictive maintenance, information exchange, and increased efficiency in operations
Smartance for pharmacovigilance	An AI-enabled Individual Case Study Report (ICSR) automation platform, Smartance is a cloud native platform that can integrate to existing client infrastructure. It can transform the pharmacovigilance (PV) landscape by extracting medical and clinical information from free text in cases of adverse events reported, inferring information from them, and capturing them in the patient safety database for downstream processing
Tarang 2.0	A life sciences lab for product testing, compliance, and certification, and providing end-to-end product development experience. It comprises different capabilities such as application validation, process validation, and product/equipment validation
Wipro Smart Track	The platform secures pharma supply chain and prevents cold chain wastage by generating geospatial alerts in real-time in the event of a temperature excursion or counterfeiting attempts. Built on Internet of Things (IoT), blockchain, and cloud, the platform helps transform supply chain security and regulatory compliance

Wipro | Life sciences digital services profile (page 6 of 7)

Offerings

NOT EXHAUSTIVE

Proprietary digital solutions (representative list)

Solution	Details
Doclytics	A Digital eTMF solution that migrates clinical trial master file documents from legacy to new document management platform by leveraging Wipro's DXP Doclytics to deliver highest level of accuracy at velocity, by automating almost 90% of the activities using VAI enabled machine-learning platform
Digital twin for supply chain transformation	The platform derives insights from sensor data to optimize asset operations and provide feedbacks into the product design cycle for future product improvements
Digital R&D lab	A digital, integrated, and collaborative scientific research platform for advancing genomics research. The platform supports collaboration of small-molecule drug discovery, therapeutic antibodies, structure-based drug design, and assay development processes
Investigator Feasibility Solution	The platform enables ontology-based harmonization of investigator data across databases with common data elements, to provide insights on feasibility of the study across different geographies, identification and selection of right investigators, and improvement in patient identification and recruitment
Virtual trials – study management suite	The platform delivers study management solutions like eConsent solution, virtual visits and follow-ups, and e-PRO (Electronic Patient Reported Outcome) leveraging digital and cognitive technologies
Wipro iX- Medical devices field services	The platform re-defines processes through a human-centered approach and empowers users with expertise in AR/VR, computer vision-aided iX solutions to assure regulatory compliance, increased profitability, and quick onboarding of new generation of engineers, while ensuring maximum efficiency in the field

Wipro | Life sciences digital services profile (page 7 of 7)

Recent developments

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Key events (representative list)

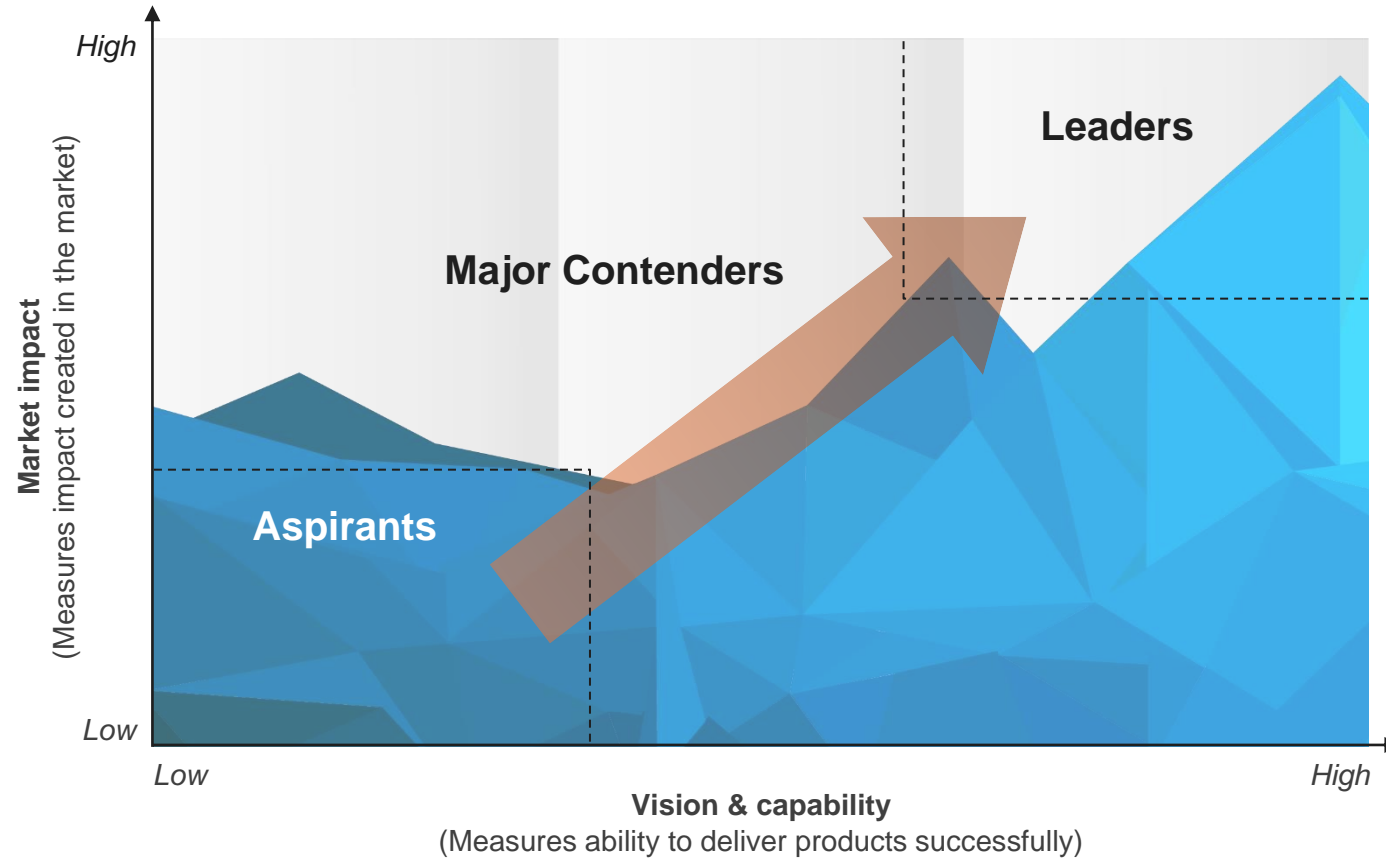
Event name	Type of event	Details
4C	Acquisition	In August 2020, acquired a customer-centric consultancy in Europe and the Middle East, which has capabilities across multiple Salesforce clouds and specializes in transforming quote-to-cash processes with Salesforce's Configure, Price, Quote (CPQ) and billing solutions
IVIA Serviços de Informática Ltda	Acquisition	In July 2020, acquired the specialized IT services provider to expand its geographical footprint in Brazil
Rational Interaction	Acquisition	In February 2020, acquired a digital CX company to increase the digital offering for marketing officers by connecting the ability to map and orchestrate the customer journey with Wipro's digital ability to design and build experiences at a global scale
CCI agent	Investment	CCI Agent is an automation complaints management solution built on Integrated Automation (IA) approach and is led by a combination of tools, technologies, and techniques such as AI/ML including Natural Language Programming (NLP), computer vision, and Robotic Process Automation (RPA) tools
ComplianceQuest	Partnership	In July 2020, partnered with a platform that develops transformative quality management solutions and helps life sciences, medical devices, and other manufacturers meet their quality, safety, and compliance goals by connecting all relevant processes across the company, and, externally with its global supply networks. The partnership will enable medical devices and pharmaceutical companies to remain compliant, handle their complaints effectively, as well as comply with medical device reporting procedures and recall requirements
Kinaxis	Partnership	In July 2020, leveraged the RapidResponse® platform, which includes AI capabilities, advanced analytics, and unique concurrent planning technique plans to provide an integrated solution to supply chain transformation, right from implementation to expansion. The partnership will help customers remove functional silos and synchronize the planning process resulting in confident decision-making, improved productivity and profitability, increased agility, and reduced risk
Ontotext	Partnership	In July 2020, partnered for semantic search and knowledge graphs for pharma and medical devices literature and litigation records management
Phillips	Partnership	In June 2020, entered into an MoU to help in achieving the goal of delivering cloud-based consumer and healthcare solutions and leverage the Health Suite Digital Platform (HSDP) features and services to create healthcare solutions, joint solution development, and joint go-to-market strategy
Medidata	Partnership	The plan is to combine the Medidata rave clinical cloud platform along with DICE framework to build a solid foundation of capabilities and operations for life sciences clinical research offerings, and further offer a single unified data platform, optimize operational execution, decrease data entry, and reduce the number of clinical systems across client's clinical research study teams
MarkLogic	Partnership	The MarkLogic Data Hub Platform integrates and curates enterprise data to provide immediate business value

Appendix

Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision & capability



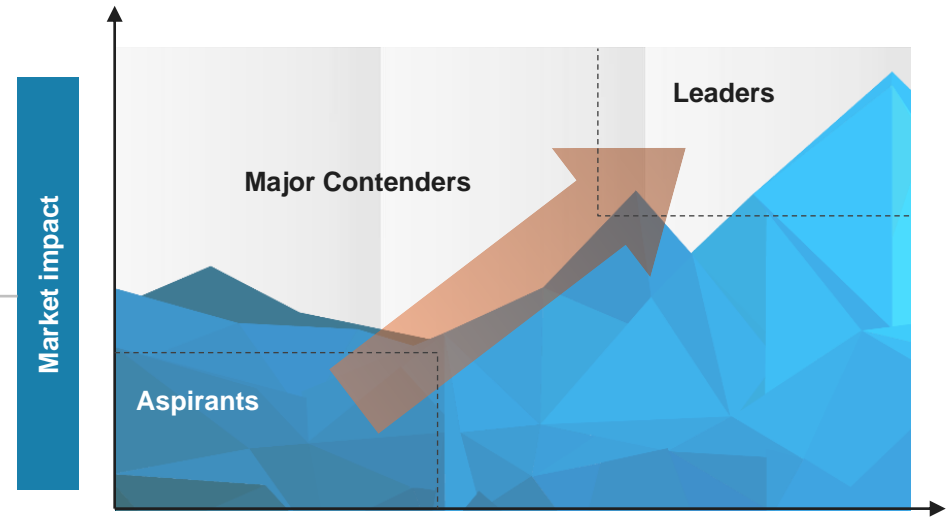
Everest Group PEAK Matrix



Services PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

- Market adoption**
No. of clients, revenue base, and YOY growth, deal value/volume
- Portfolio mix**
Diversity of client/revenue base across geos and type of engagements
- Value delivered**
Value delivered to the client based on customer feedback and transformational impact



Vision & capability

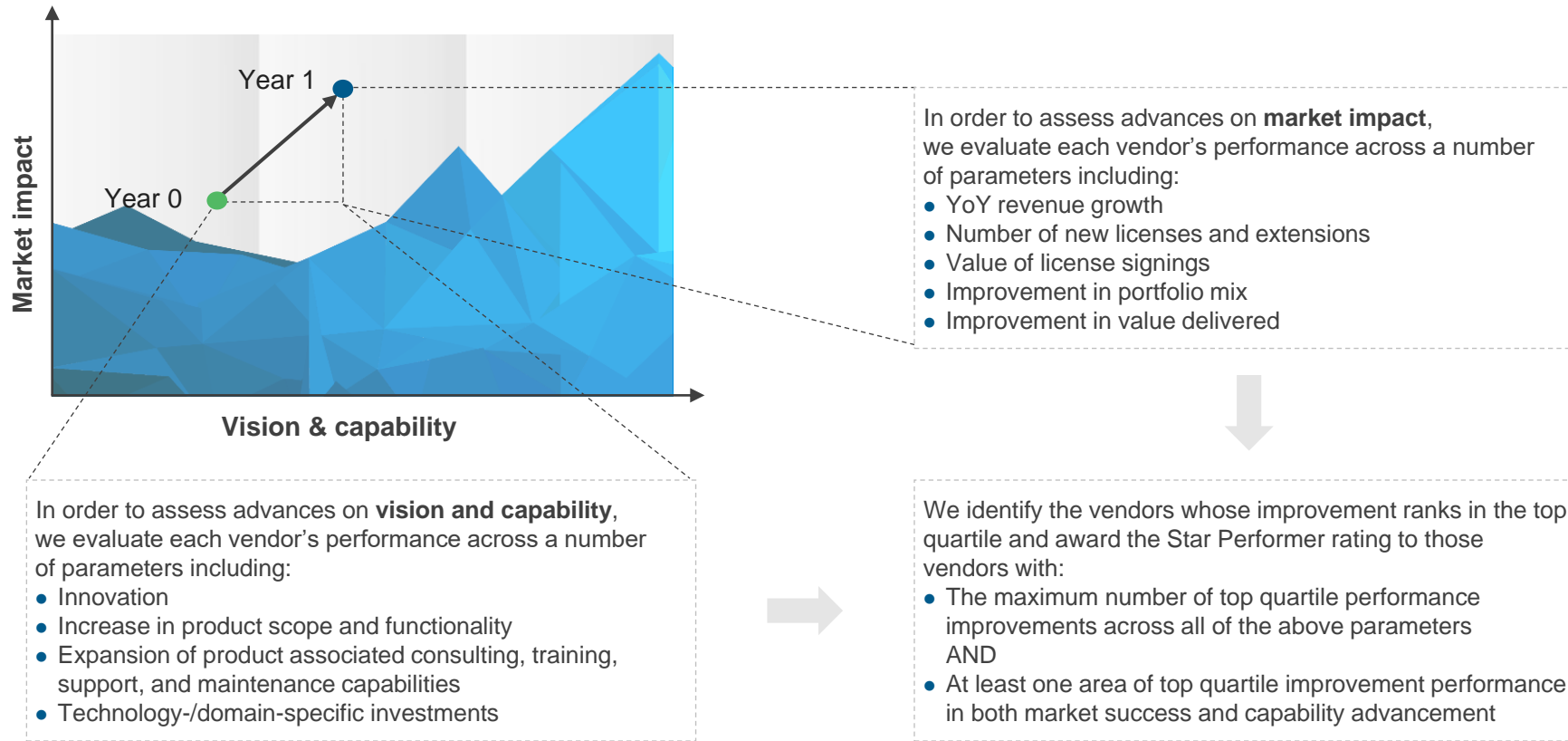
Measures ability to deliver services successfully. This is captured through four subdimensions

- Vision and strategy**
Vision for the client and itself; future roadmap and strategy
- Scope of services offered**
Depth and breadth of services portfolio across service subsegments / processes
- Innovation and investments**
Innovation and investment in the enabling areas, e.g., technology IP, industry/domain knowledge, innovative commercial constructs, alliances, M&A, etc.
- Delivery footprint**
Delivery footprint and global sourcing mix

Everest Group confers the Star Performers title on providers that demonstrate the most improvement over time on the PEAK Matrix®

Methodology

Everest Group selects Star Performers based on the relative YoY improvement on the PEAK Matrix



The Star Performers title relates to YoY performance for a given vendor and does not reflect the overall market leadership position, which is identified as Leader, Major Contender, or Aspirant.

FAQs

Does the PEAK Matrix® assessment incorporate any subjective criteria?

Everest Group's PEAK Matrix assessment adopts an unbiased and fact-based approach (leveraging service provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information). In addition, these results are validated / fine-tuned based on our market experience, buyer interaction, and provider/vendor briefings

Is being a “Major Contender” or “Aspirant” on the PEAK Matrix, an unfavorable outcome?

No. The PEAK Matrix highlights and positions only the best-in-class service providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition

What other aspects of PEAK Matrix assessment are relevant to buyers and providers besides the “PEAK Matrix position”?

A PEAK Matrix position is only one aspect of Everest Group's overall assessment. In addition to assigning a “Leader”, “Major Contender,” or “Aspirant” title, Everest Group highlights the distinctive capabilities and unique attributes of all the PEAK Matrix providers assessed in its report. The detailed metric-level assessment and associated commentary is helpful for buyers in selecting particular providers/vendors for their specific requirements. It also helps providers/vendors showcase their strengths in specific areas

What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?

- Participation incentives for buyers include a summary of key findings from the PEAK Matrix assessment
- Participation incentives for providers/vendors include adequate representation and recognition of their capabilities/success in the market place, and a copy of their own “profile” that is published by Everest Group as part of the “compendium of PEAK Matrix providers” profiles

What is the process for a service provider / technology vendor to leverage their PEAK Matrix positioning and/or “Star Performer” status ?

- Providers/vendors can use their PEAK Matrix positioning or “Star Performer” rating in multiple ways including:
 - Issue a press release declaring their positioning. See [citation policies](#)
 - Customized PEAK Matrix profile for circulation (with clients, prospects, etc.)
 - Quotes from Everest Group analysts could be disseminated to the media
 - Leverage PEAK Matrix branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)
- The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with the designated POC at Everest Group.

Does the PEAK Matrix evaluation criteria change over a period of time?

PEAK Matrix assessments are designed to serve present and future needs of the enterprises. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality as well as serve the future expectations of enterprises



With you on the journey

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