

Everest Group PEAK Matrix™ for Life Sciences Digital in Europe Service Providers

Focus on TCS
September 2018



Introduction and scope

Everest Group recently released its report titled “[Life Sciences Digital in Europe – Service Provider Landscape with Services PEAK Matrix™ Assessment 2018: Accelerating Transformation Despite Regulatory Complexity.](#)” This report analyzes the changing dynamics of the life sciences digital services landscape in Europe and assesses service providers across several key dimensions.

As a part of this report, Everest Group updated its classification of 21 service providers on the Everest Group PEAK Matrix™ for Life Sciences Digital in Europe into Leaders, Major Contenders, and Aspirants. The PEAK Matrix is a framework that provides an objective, data-driven, and comparative assessment of Life Sciences Digital service providers based on their absolute market success and delivery capability in Europe.

Based on the analysis, **TCS emerged as a Leader.** This document focuses on **TCS'** Life Sciences digital services in Europe experience and capabilities, and includes:

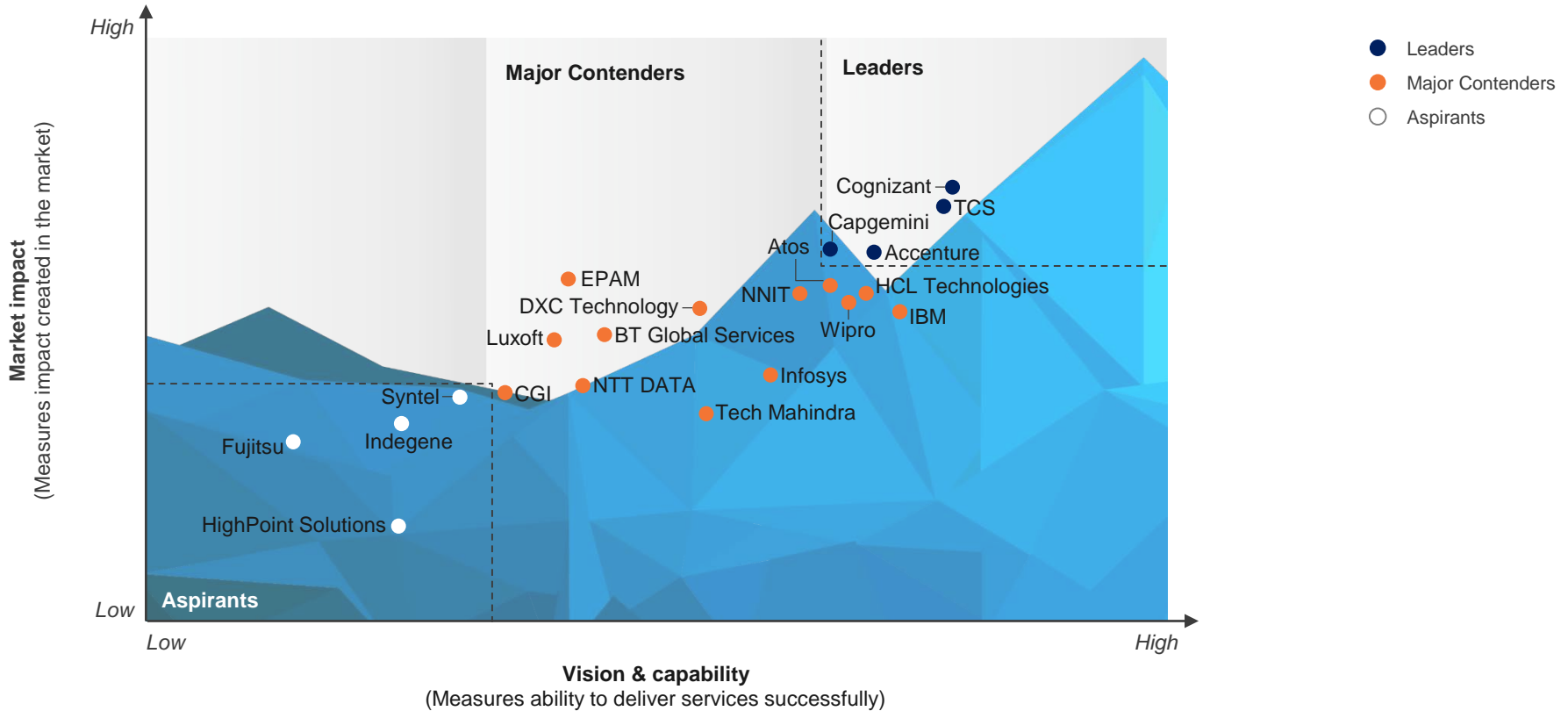
- TCS' position on the Life Sciences Digital in Europe PEAK Matrix
- Detailed life sciences digital services in Europe profile of TCS

Buyers can use the PEAK Matrix to identify and evaluate different service providers. It helps them understand the service providers' relative strengths and gaps. However, it is also important to note that while the PEAK Matrix is a useful starting point, the results from the assessment may not be directly prescriptive for each buyer. Buyers will have to consider their unique situation and requirements, and match them against service provider capability for an ideal fit.

Everest Group PEAK Matrix™

Life Sciences Digital in Europe – Service Provider Landscape with Services PEAK Matrix™ Assessment 2018: Accelerating Transformation Despite Regulatory Complexity | TCS Positioned as Leader

Everest Group Life Sciences Digital in Europe – Service Provider Landscape with Services PEAK Matrix™ Assessment 2018: Accelerating Transformation Despite Regulatory Complexity



Note Assessments for Accenture, BT Global Services, CGI, Fujitsu, 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

TCS | Europe life sciences digital services profile (page 1 of 2)

Areas of strength

- Credible digital transformation capabilities with scale and consistency of performance
- Focus on next-generation digital solutions such as Advanced Drug Development Platform leveraging AI and IoT for drug development and patient engagement

Areas of improvement

- Creating greater impact in the mid-market, given existing presence in Big-Pharma
- Enable greater proactive engagement and help clients identify areas for further investment in digital

LS line of business coverage*

■ High (>20%) ■ Medium (10-20%) ■ Low (<10%)

Medical devices	■ Low (<10%)	Pharmaceuticals	■ High (>20%)
Biotechnology	■ Medium (10-20%)	Others	■ Low (<10%)

Scope of digital services for LS

AI, AR/VR, 3D printing, big data and analytics, cloud, cognitive computing, cybersecurity, digital marketing & marketplace, platform, advisory/consulting services, UI/UX design, IoT, mobility, NLP, process automation, and social

LS value chain coverage*

■ High (>20%) ■ Medium (10-20%) ■ Low (<10%)

Drug discovery and research	■ Medium (10-20%)	Sales and marketing	■ High (>20%)
Clinical and pre-clinical trials	■ High (>20%)	Supply chain and distribution	■ Medium (10-20%)
Manufacturing operations	■ Medium (10-20%)		

LS digital services in Europe revenue



LS digital services in Europe buyer focus segments*

■ High (>20%) ■ Medium (10-20%) ■ Low (<10%)

Small (annual revenue < US\$1 billion)	■ Low (<10%)
Medium (annual revenue = US\$1-5 billion)	■ Low (<10%)
Large (annual revenue > US\$5 billion)	■ High (>20%)

LS digital services delivery map

● >1,000 FTEs ● 500-1,000 FTEs ● 100-500 FTEs ● <100 FTEs



Vision and strategy for LS digital services

- Enabling customers in their digital transformation journey by using thought leadership framework of Business 4.0. Bringing TCS' domain expertise, technical expertise and extensive contextual knowledge together to deliver digital solutions for customers
- Significant investments in new and advanced platforms as well as comprehensive digital workforce training plan for consultants

* Classified as high/medium/low, based on contribution to revenue

TCS | Europe life sciences digital services profile (page 2 of 2)

Offerings and recent developments

Proprietary digital solutions (representative list)

Solution	Details
Advanced Drug Development (ADD) Platform	Powered by cognitive-enabled Decision Fabric, software-as-a-service platform on TCS cloud with five distinct aspects – connected clinical trials, integrated patient safety, integrated data management, metadata registry and transformation, and drug development insights
Decision Fabric for Drug Safety and Pharma	It is an AI based cognitive solution providing a Natural Language Processing (NLP) engine with strong lexical analysis and support for named-entity recognition
Ignio	Ignio is a cognitive automation solution for enterprises. It is a self-learning platform that delivers intelligent automation to minimize operational risks and simultaneously improve efficiency and responsiveness
Real World Evidence (RWE) Platform	A solution to monitor adverse events and support clinical trial designs and studies to generate innovative treatment approaches
TCS Connected Universe Platform (TCUP)	An IoT platform that allows enterprises to develop, deploy, and administer IoT software applications
Customer Engagement Platform (CEP)	A cloud-based communication & collaboration and e-detailing closed-loop marketing solution
Sensor Data Analytics Framework (SDAF)	A configurable framework built to rapidly collect, process, and analyze all types of sensor and log data

Key events (representative list)

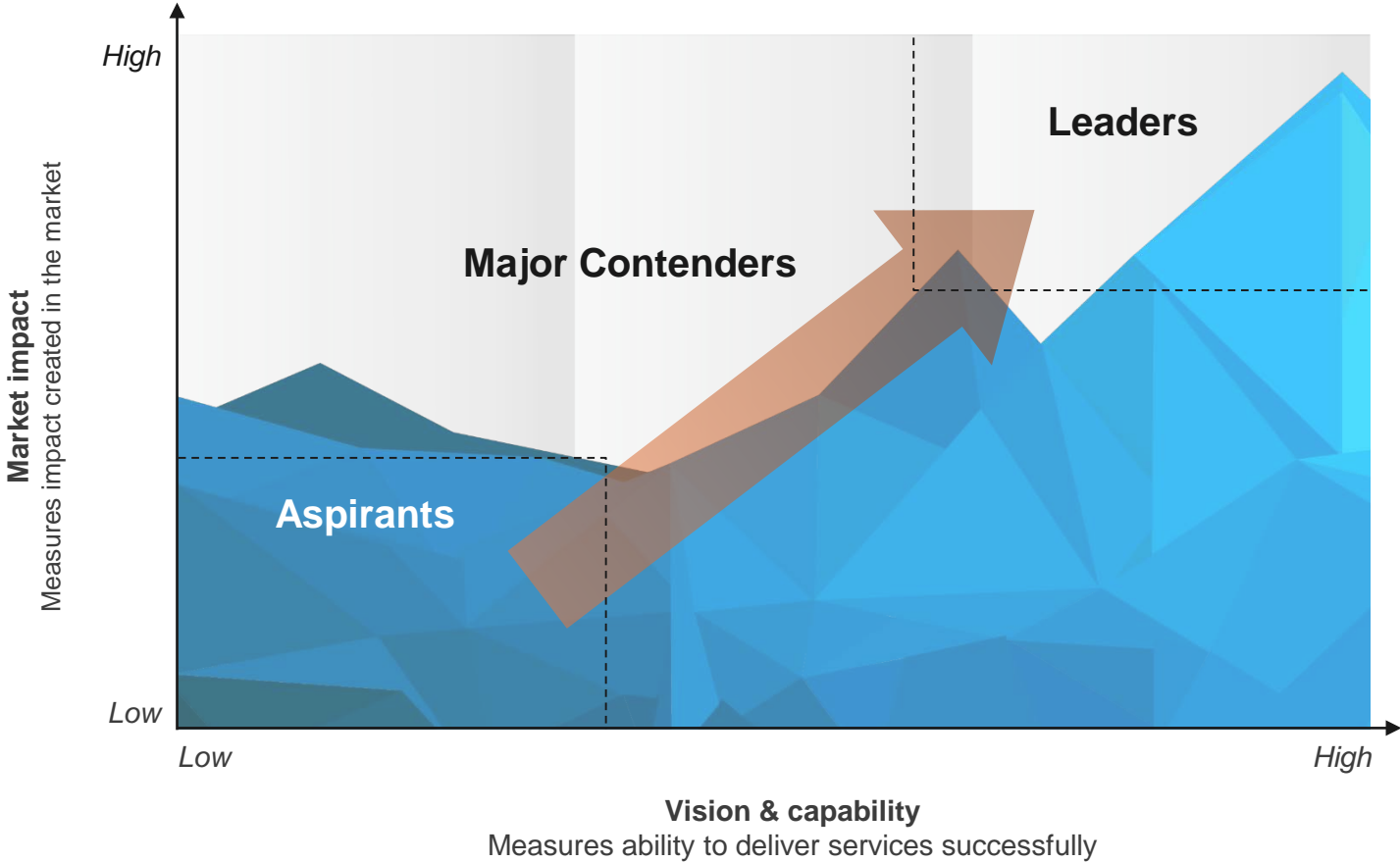
Event name	Type of event	Details
TCS Innovation Forum	Annual Digital Conference – London (May 2017)	The theme for TCS' flagship innovation event was "Being Digital - Innovating for a Smarter, Faster, Lighter Enterprise." The event provided an outlook on the future of large-scale computing within enterprises as well as new business models around several new technologies including advanced data analytics, AI, and ML
Multiple	Alliances	TCS' alliances in life sciences include those with IBM Watson, Google Cloud Platform, AWS, MS Azure, cloudera, GE Predix, BluePrism, UIPath, Oracle, SAP, Adobe, and academic institutions such as UC Berkeley
Connected Clinical Trials	Solution launch (2017)	TCS launched "Connected Clinical Trials" platform on its Advanced Drug Development Suite, an innovative Software-as-a-Service (SaaS) platform that enables pharmaceutical companies to significantly transform patient engagement in clinical trials and improve the efficiency and accountability of the clinical supply process

Appendix

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



Everest Group PEAK Matrix



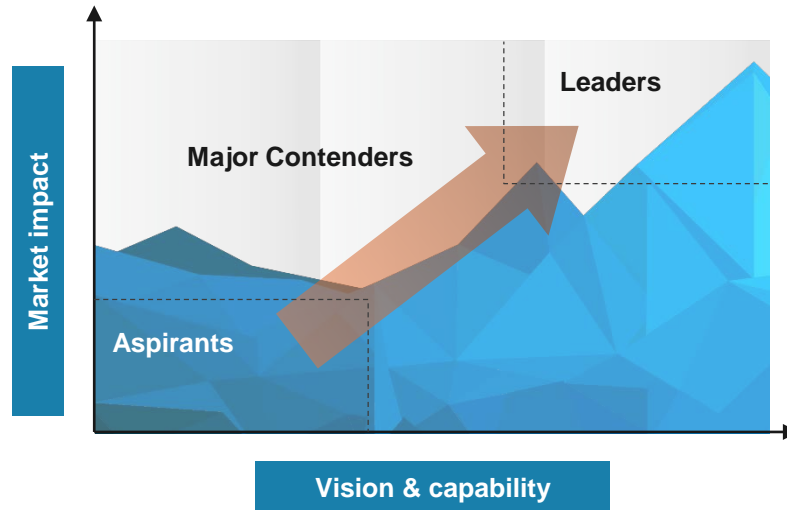
Services PEAK Matrix™ evaluation dimensions

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



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 sub-segments / 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

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



About Everest Group

Everest Group is a consulting and research firm focused on strategic IT, business services, and sourcing. We are trusted advisors to senior executives of leading enterprises, providers, and investors. Our firm helps clients improve operational and financial performance through a hands-on process that supports them in making well-informed decisions that deliver high-impact results and achieve sustained value. Our insight and guidance empower clients to improve organizational efficiency, effectiveness, agility, and responsiveness. What sets Everest Group apart is the integration of deep sourcing knowledge, problem-solving skills and original research. Details and in-depth content are available at www.everestgrp.com.

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