



Everest Group's PEAK Matrix™ for Life Sciences IT Application Services

Focus on TCS
June 2017



Everest Group recently released its report titled “[Life Sciences IT Application Services – Service Provider Landscape with PEAK Matrix™ Assessment 2017](#)”. This report analyzes the changing dynamics of the life sciences IT application services landscape and assesses service providers across several key dimensions.

As a part of this report, Everest Group analyzed 22 leading service providers on the Everest Group Performance | Experience | Ability | Knowledge (PEAK) Matrix, specific to life sciences IT application services, categorizing them into Leaders, Major Contenders, and Aspirants. The PEAK Matrix is a composite framework that provides an objective, data-driven, and comparative assessment of life sciences IT application service providers based on their absolute market success and delivery capability.

Based on the analysis, **TCS emerged as a Leader and Star Performer**. This document focuses on TCS’ life sciences IT application services experience and capabilities. It includes:

- TCS’ position on the life sciences IT application services PEAK Matrix
- Detailed life sciences IT application services 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.

Background of the research

The Healthcare and Life Sciences (HLS) landscape has been subject to significant turbulence on account of a gamut of factors including escalating costs, widespread regulatory amendments, changing business models, and evolution of the patient-centric paradigm (with mobile computing, social media platforms, “anytime-anywhere” information access, and self-service channels). This combination of disruptive and legacy factors has driven HLS firms to adopt new technologies, while also revamping their existing systems, processes, and interfaces.

As the technology mandate for HLS enterprises evolves, so do their relationships with IT service providers. This, in turn, is driving the need for relevant research and market intelligence on demand and supply trends in HLS IT services across the three major market segments – payer, provider, and life sciences. Everest Group’s HLS IT research program addresses this market requirement by analyzing outsourcing trends and service provider capabilities specific to IT services in the healthcare and life sciences vertical.

In this report, we analyze the capabilities of 22 IT application service providers specific to the global life sciences sector. These service providers are mapped on the Everest Group Performance | Experience | Ability | Knowledge (PEAK) Matrix, which is a composite index of a range of distinct metrics related to a provider’s capability and market success. We focus on:

- IT application services market trends in life sciences
- The landscape of service providers for life sciences IT application services
- Assessment of the service providers on several capability- and market success-related dimensions
- Implications for life sciences IT application buyers and service providers

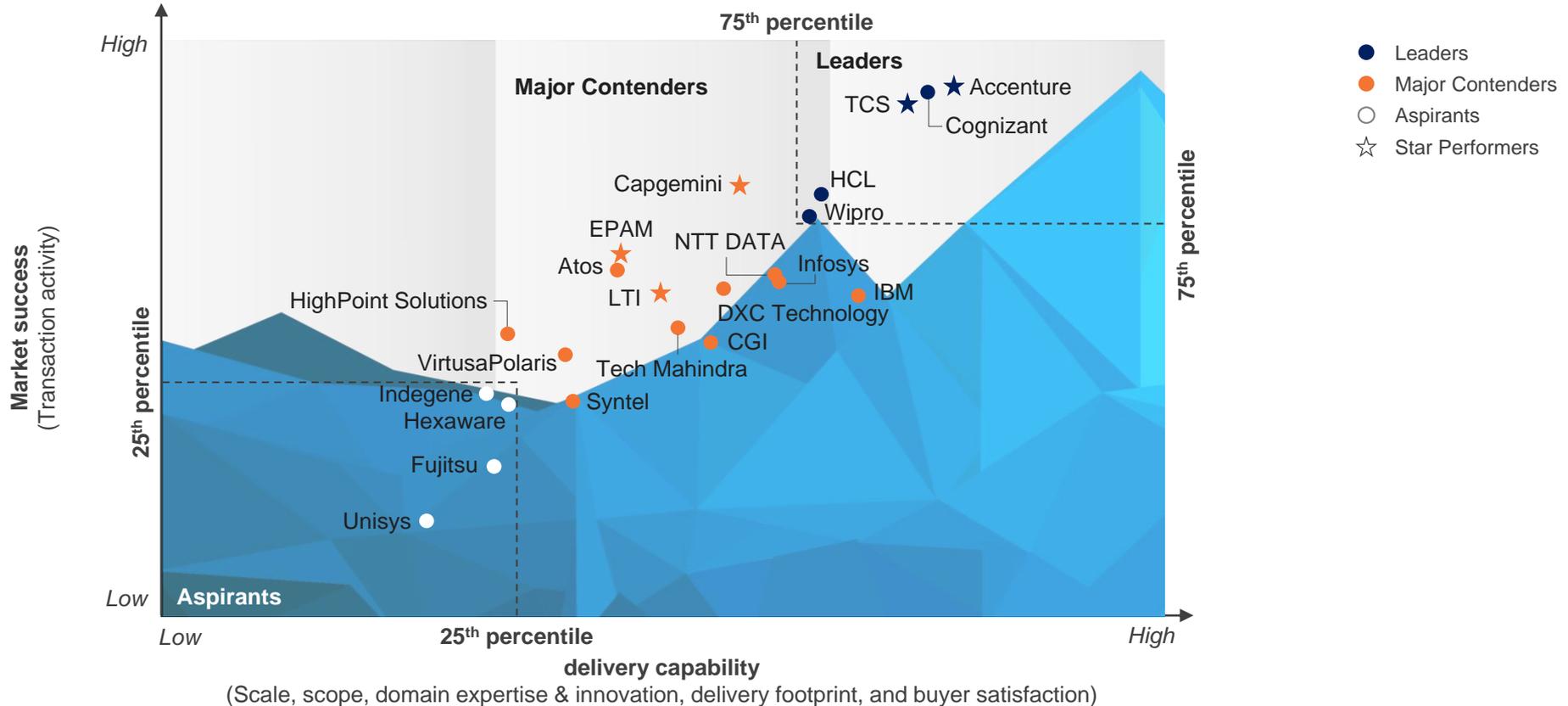
Scope of this report

- **Industry:** Life sciences (pharmaceuticals, medical devices, biotechnology, and other life sciences¹)
- **Services:** Multi-year and annuity-based application services
- **Geography:** Global
- **Sourcing model:** Third-party ITS transactions; excludes shared services or Global In-house Centers (GICs)

¹ Includes healthcare data & information services and medical products distribution

TCS is positioned as a Leader and Star Performer on Everest Group's PEAK Matrix for life sciences IT application services

Everest Group PEAK MatrixTM for life sciences IT application services¹



¹ Assessment for DXC Technology, Fujitsu, HighPoint Solutions, IBM, Indegene, and Unisys excludes service provider inputs on this particular study and is based on Everest Group's estimates which leverage Everest Group's proprietary Transaction Intelligence (TI) database, ongoing coverage of DXC Technology, Fujitsu, HighPoint Solutions, IBM, Indegene, and Unisys service provider public disclosures, and interaction with buyers

Source: Everest Group (2017)

Life Sciences IT application services Star Performer 2017

Life Sciences IT application services Star Performer 2017

Distinguishing features of capability advancements in 2016

Distinguishing features of market success in 2016

Change in position on the PEAK Matrix for life sciences IT application services

- Strong growth story in the strategic clinical and R&D space with solutions such as Advanced Drug Development Platform, Connected Clinical Trials, and Laboratory Information Management Systems (LIMS)
- Encouraging traction in taking a platform-based approach

- Over 20% YOY growth on a sizable life sciences IT application services revenue base
- Continued momentum with growth across regions with traction in Asia-Pacific and Europe

Strengthened position as a Leader

TATA CONSULTANCY SERVICES

TCS' Life Sciences IT application services profile

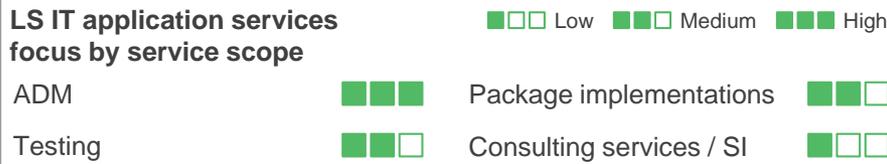
(page 1 of 2)

Life Sciences (LS) IT application services overview

Strengths

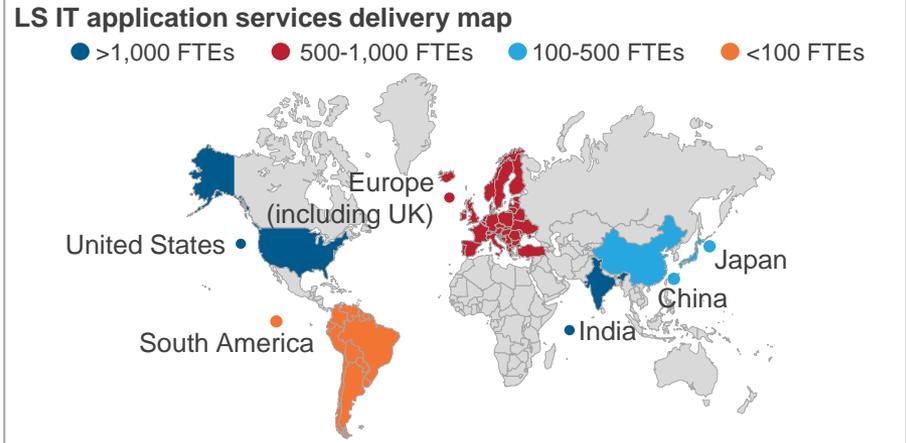
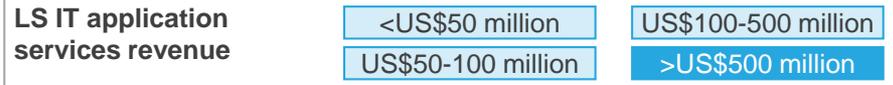
- Strong focus on development of next-generation solutions, incorporating AI, IoT, and platform-driven approaches for areas such as drug development and patient engagement
- A strong foothold in pharma and medical devices, with growing traction among biotechnology firms, and has the ability and willingness to farm incumbent life sciences clients for incremental business

Scope and coverage: Application development, application management, application modernization, system integration, digital transformation, SaaS, performance engineering, package implementations, assurance services, and consulting services



Areas of improvement

- Ward off aggressive pricing tactics by peer group by establishing new value-levers
- Improve articulation to help pivot in the new normal which is changing from arbitrage-first to digital-first



Source: Everest Group (2017)

TCS' Life Sciences IT application services profile

(page 2 of 2)

Offerings and recent developments

Proprietary solutions (representative list)

Solution	Details
TCS' Advanced Drug Development (ADD) platforms	An integrated platform for the entire value chain of drug development process which includes: <ul style="list-style-type: none"> • Integrated Data Management (IDM) – EDC system for Clinical Data Management (CDM) • Drug Development Insights (DDI) – aggregates clinical/operational data from structured and unstructured data sources into a clinical data warehouse • Integrated Patient Safety (IPS) – covers all aspects of pharmacovigilance • MetaData Registry (MDR) – enables management and governance of metadata standards • Clinical Data Transformation (CDT) – transforms clinical data acquired from a variety of data sources • Connected Clinical Trial (CCT) – improves patient engagement, enhances medication adherence, etc.
Laboratory Information Management System (LIMS)	Includes tool such as LabWare LIMS Assessment Toolkit (assess LIMS configuration), LabVantage Custom Code Review (code review w.r.t to coding standards), Framework for OpenLab CDS Assessment , LIMS Data Migration Architecture, LIMS Web Services Integration Framework (system and application integration), Laboratory Instrument Framework Device (driver development and data standardization, and LIMS Validation Templates
SAP Advanced Track & trace (ATTP)	SAP-based solution for end-to-end analysis of multiple human genome Next-Generation Sequence (NGS) data
Field Inventory Framework (FIH)	An IoT-based framework to track, trace, and manage inventory in the field covering processes such as implant surgery fulfillment, vendor managed inventory, returnable asset tracking, and equipment consumable tracking

Key events (representative list)

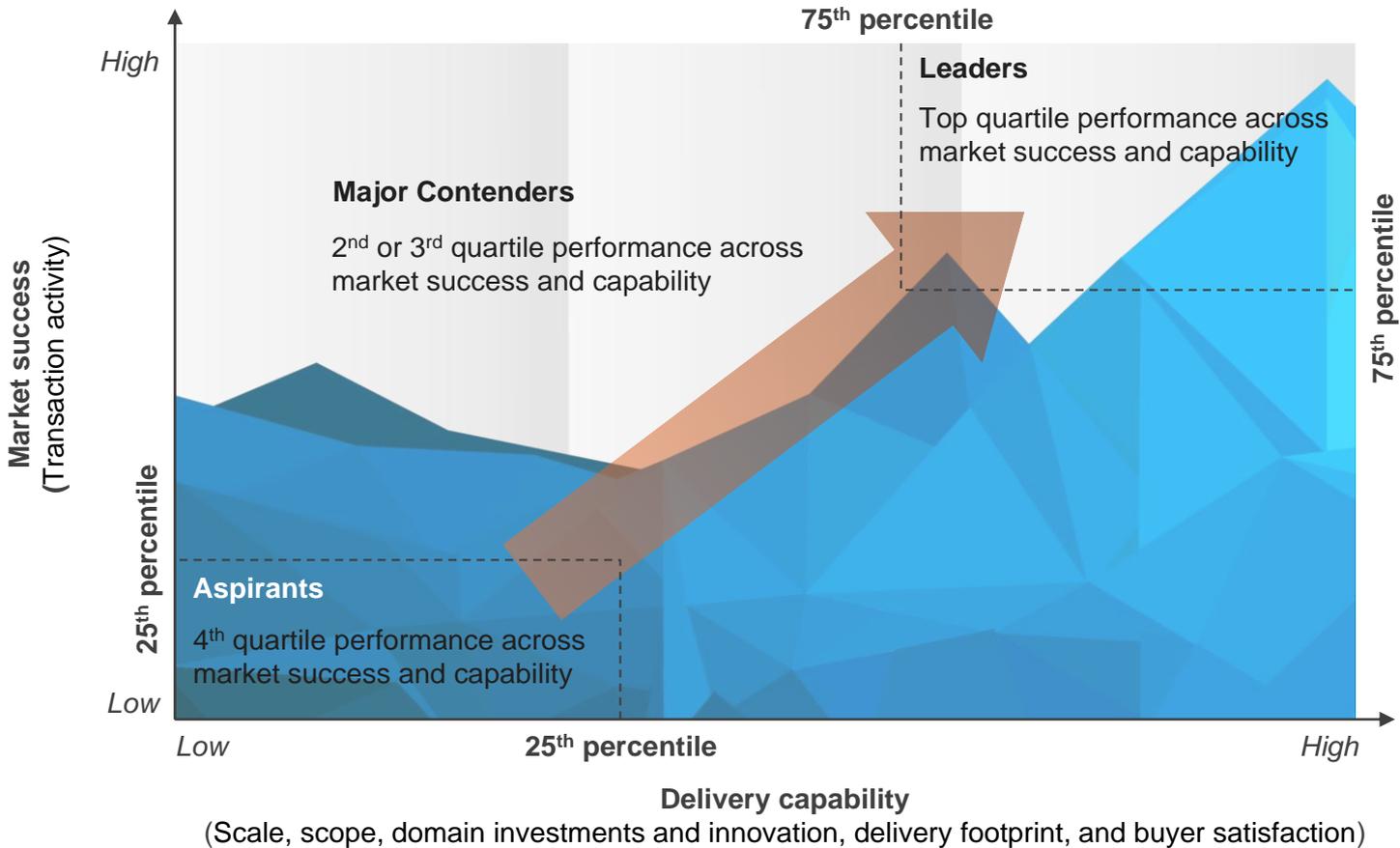
Event name	Type of event	Details
Carnegie Mellon University (CMU)	Partnership	April 2017: Made US\$35 million grant to CMU, the largest ever industry donation for funding a new facility, named as TCS Hall to support education and industrial research, at the University campus in Pittsburgh
TCS – Mitsubishi (Japan)	M&A	April 2014: Agreement with Mitsubishi to merge TCS Japan, IT Frontier Corporation (ITF), and Nippon TCS Solution Center (NTSC).TCS holds 51% share in the merged entity, with Mitsubishi owning the rest
(Several)	Alliances	TCS' alliances in life sciences include those with Oracle, Advinus, MetricStream, SAP, Sparta Systems, Camstar, and academic institutions such as UC Berkeley as well as some Indian universities

Source: Everest Group (2017)

Appendix

Everest Group Performance | Experience | Ability | Knowledge (PEAK) Matrix is a proprietary framework for assessment of a service provider's capability

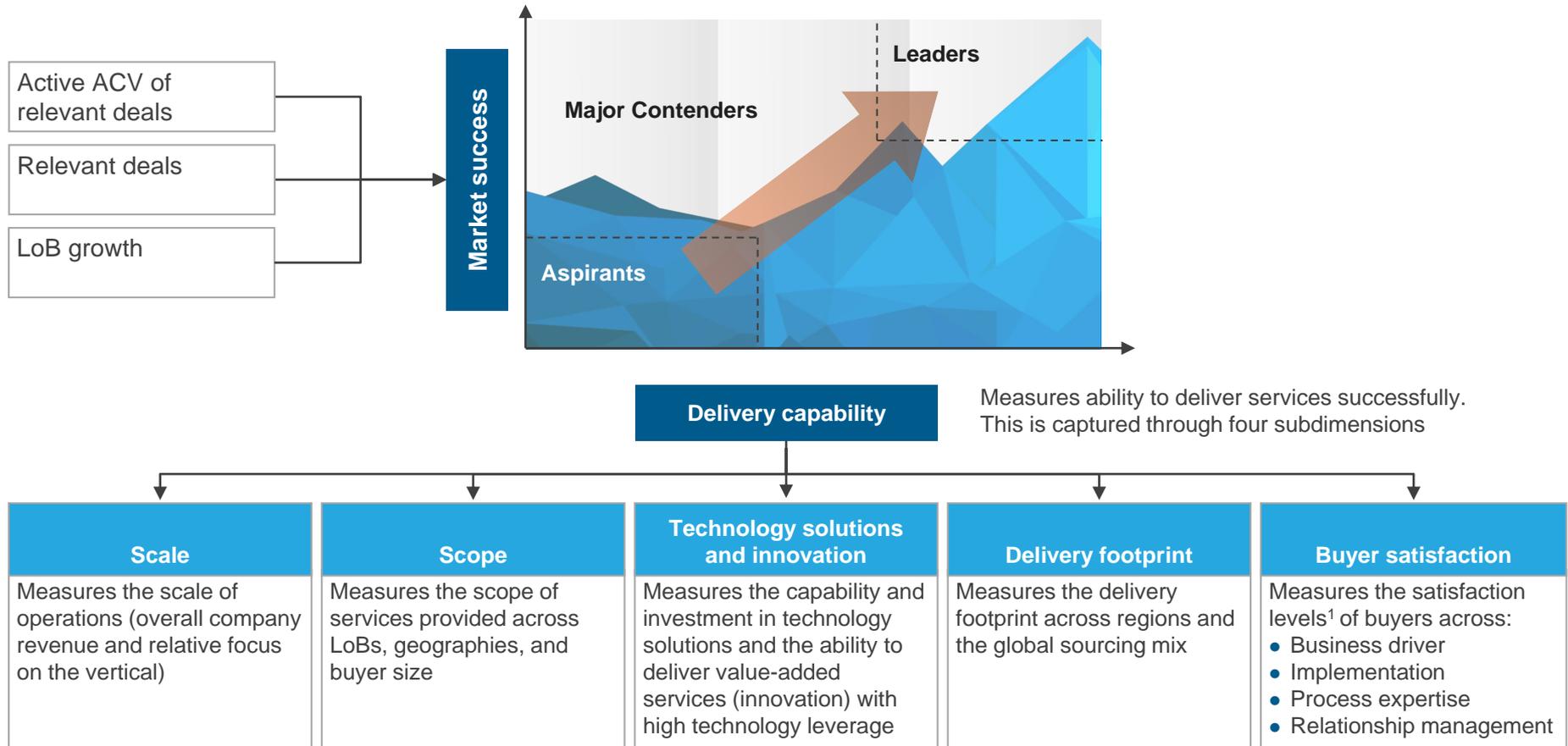
Everest Group PEAK Matrix for life sciences IT application services



Everest Group's PEAK Matrix is a composite index of a range of distinct metrics related to a service provider's scale, scope, technology/domain investments, delivery footprint, and resultant market success in the context of a given services function

Dimensions of service providers' capability and market success underlying the PEAK Matrix

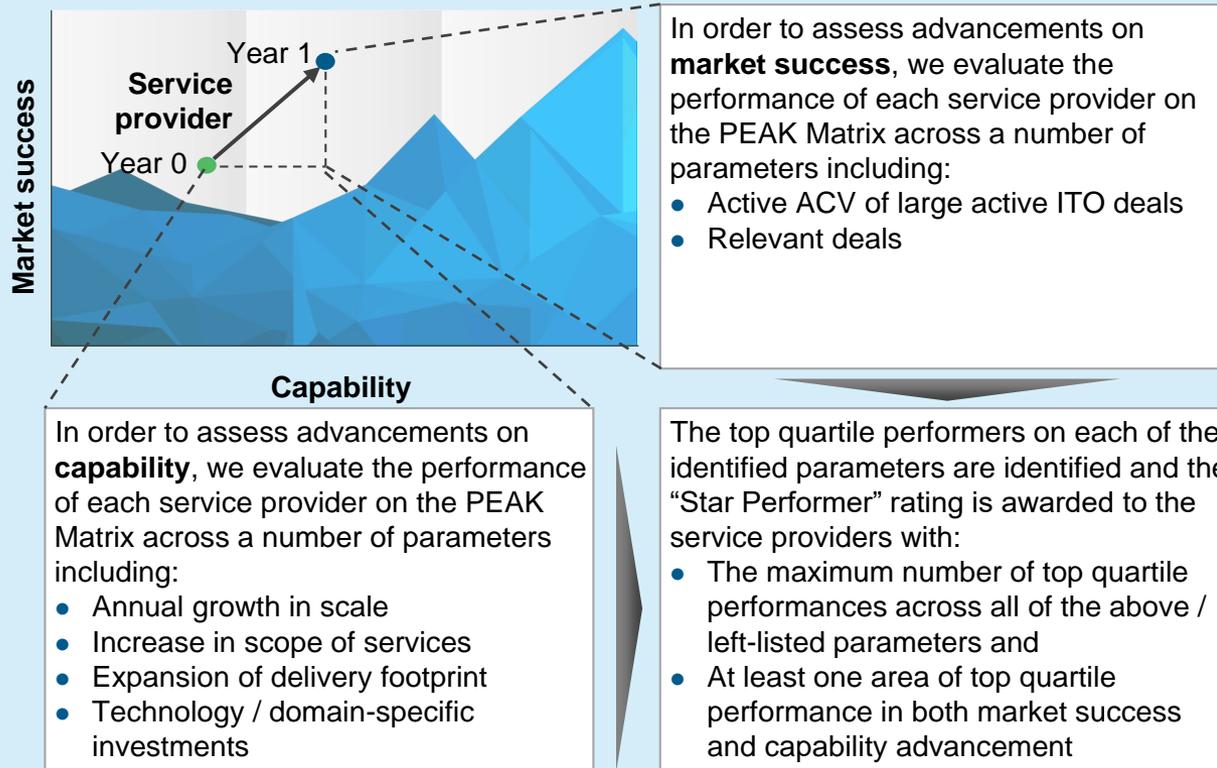
NOT EXHAUSTIVE



Everest Group confers the “Star Performers” title on providers that demonstrate the strongest forward movement over time on the PEAK Matrix

Methodology

Everest Group selects Market Star Performers based on the relative YOY movement of each service provider on the PEAK Matrix



**2017 Life Sciences IT
Application Services
PEAK Matrix Star
Performers**

The “Star Performers” title relates to YOY performance for a given service provider and does not reflect the overall market leadership position. Those identified as “Star Performers” may include “Leaders”, “Major Contenders”, or “Aspirants”

Does the PEAK Matrix assessment incorporate any subjective criteria?

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

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

- No. PEAK Matrix highlights and positions only the best-in-class service providers in a particular functional/vertical services area. There are a number of providers in the global scenario that are assessed but 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"?

- 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 providers for their specific requirements. It also helps providers showcase their strengths in specific areas

What are the incentives for buyers and providers to participate in / 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 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 to leverage their PEAK Matrix positioning status?

- Providers can use their PEAK Matrix positioning rating in multiple ways including:
 - Issuing a press release declaring their positioning/rating
 - Getting customized PEAK Matrix profile for circulation (with clients, prospects, etc.)
 - Quotes from Everest Group analysts could be disseminated to the media
 - Leveraging 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**



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 empowers 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.

Dallas (Headquarters)

info@everestgrp.com
+1-214-451-3000

Bangalore

india@everestgrp.com
+91-804-276-4533

Delhi

india@everestgrp.com
+91-124-496-1000

London

unitedkingdom@everestgrp.com
+44-207-129-1318

New York

info@everestgrp.com
+1-646-805-4000

Toronto

canada@everestgrp.com
+1-647-557-3475

Stay connected

Website



www.everestgrp.com

Social Media



@EverestGroup



@Everest Group

Blog

[Sherpas In Blue Shirts](http://www.sherpasinblueshirts.com)

www.sherpasinblueshirts.com