



Everest Group PEAK Matrix[®] for Life Sciences Operations Service Providers 2022

Focus on Wipro
July 2022



Background of the research

The post-pandemic era has brought about several changes in the operating dynamics of the life sciences industry. There is a movement from centralized trials to hybrid and decentralized modes of operations and face-to-face Healthcare Professional (HCP) interactions are being replaced with a coordinated omnichannel outreach approach. Apart from an increased focus on safety from both regulators and consumers leading to a continued focus on Pharmacovigilance (PV), enterprises have increased their appetite for digital tools and technologies to realize efficiencies and cost savings.

To effectively cater to the evolving enterprise needs, service providers have invested in increasing the breadth and depth of their functionalities/offerings across the life sciences operations value chain. They have invested in a host of avenues such as the enhancement of their virtual trial capabilities, augmentation of the automation-enabled platform-based PV service offerings, and the use of intelligent automation and predictive analytics for personalized HCP targeting, among other investments, to keep pace with the rapidly evolving needs of the market.

In this research, we present an assessment and detailed profiles of 32 Life Sciences (LS) BPS service providers featured on the life sciences operations – services PEAK Matrix®. Each service provider profile provides a comprehensive picture of its service focus, core capabilities, key Intellectual Property (IP) / technology solutions, domain investments, and case studies. The assessment is based on Everest Group’s annual RFI process for the calendar year 2021-22, interactions with leading life sciences BPS services providers, client reference checks, and ongoing analysis of the life sciences BPS market.

Scope of this report



Geography
Global



Providers

Accenture, APCER Life Sciences, Ashfield, Atos, Atria, Charles River Laboratories, Clario, Cognizant, Conduent, DXC Technology, Ergomed plc, Freyr, Genpact, HCL Technologies, ICON plc, Indegene, IQVIA, Labcorp Drug Development, Lash Group, Medpace, NAMSA, Navitas Life Sciences, Parexel, PharmaLex, PPD, ProPharma Group, Syneos Health, TCS, Tech Mahindra, Wipro, WNS, and ZS



Services
Life sciences operations

Everest Group Life Sciences Operations – Services PEAK Matrix® characteristics

Everest Group classified 32 life sciences BPS providers on the Everest Group PEAK Matrix® into the three categories of Leaders, Major Contenders, and Aspirants.

Leaders:

There are 10 service providers in the Leaders category – Accenture, Atria, Cognizant, Genpact, HCL Technologies, IQVIA, ICON plc, TCS, Wipro, and ZS.

Major Contenders:

The Major Contenders category has 17 service providers – Ashfield, Atos, Clario Charles River Laboratories, Conduent, DXC Technology, Ergomed plc, Indegene, Labcorp Drug Development, Medpace, NAMSA, Navitas Life Sciences, Parexel, PharmaLex, PPD, Syneos Health, Tech Mahindra, and WNS.

Aspirants:

Ashfield, APCER Life Sciences, Freyr, Lash Group, and ProPharma Group are the Aspirants on the PEAK Matrix®.

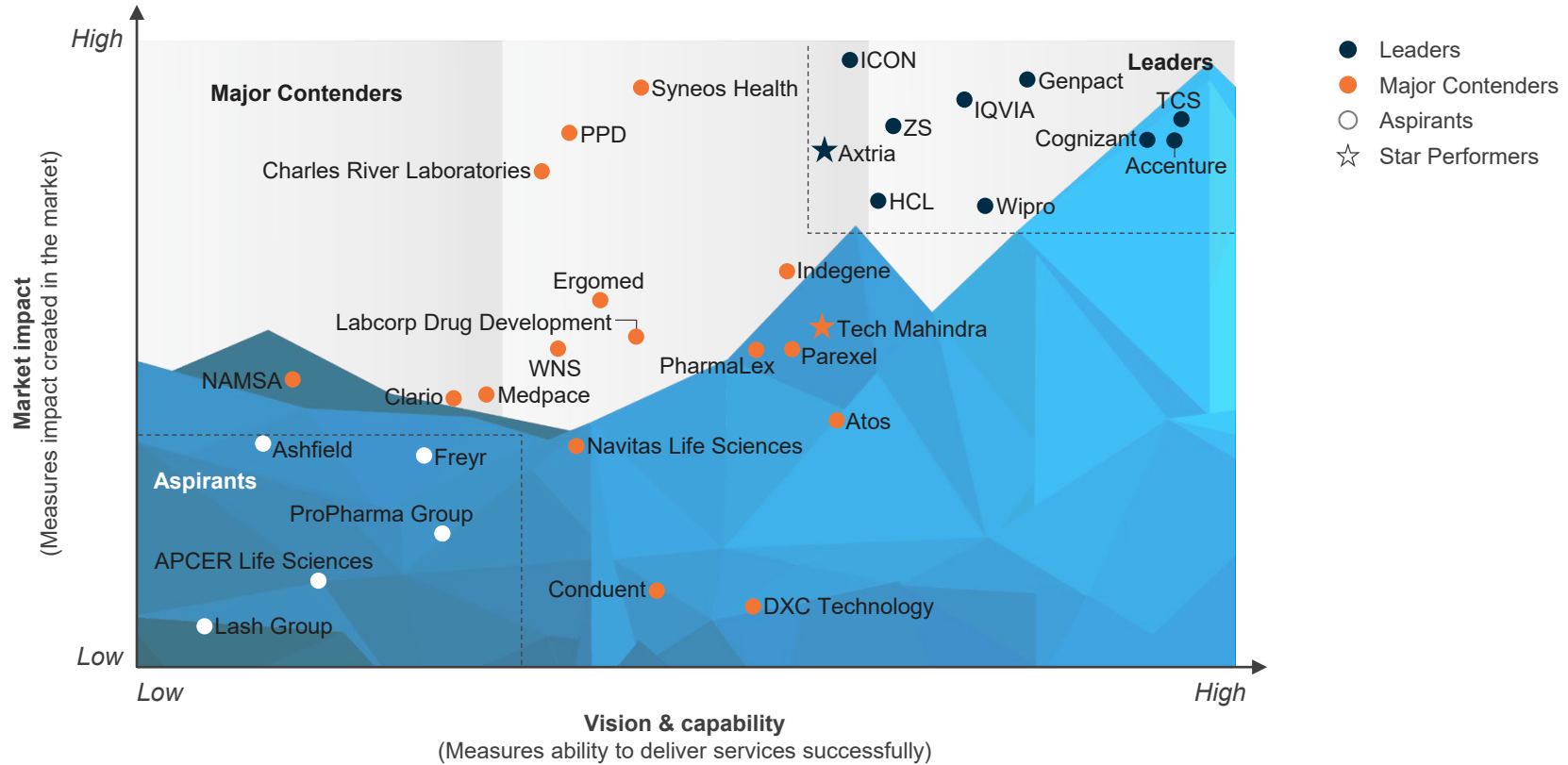
Everest Group conferred the Star Performers title on providers that demonstrated the strongest forward and upward movement on the PEAK Matrix®. Atria and Tech Mahindra are Star Performers on the LS operations Everest Group PEAK Matrix® for 2022.

Everest Group PEAK Matrix®

Life Sciences Operations PEAK Matrix® Assessment 2022 | Wipro positioned as a Leader



Everest Group Life Sciences Operations PEAK Matrix® Assessment 2022¹



¹ Assessment for APCER Life Sciences, Ashfield, Atos, Clario, Charles River Laboratories, DXC Technology, Ergomed plc, Freyr, ICON plc, IQVIA, Labcorp Drug Development, Lash Group, Medpace, NAMSA, Navitas Life Sciences, Parexel, PPD, ProPharma Group, and Syneos Health excludes service provider inputs and is based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interactions with buyers
Source: Everest Group (2022)

Wipro | LS operations profile (page 1 of 6)

Overview

Company overview

Wipro Limited harnesses the power of cognitive computing, hyper-automation, robotics, cloud, analytics, and emerging technologies to help clients adapt to the digital world and make them successful. The company has more than 2,00,000 dedicated employees serving clients across six continents.

Headquarters: Bangalore, India

Website: www.wipro.com

Key leaders

- Thierry Delaporte, MD & Chief Executive officer
- Nagendra Bandaru, Managing Partner, iCORE
- Jagmohan Babra, Head of S.E.T. iCORE- Digital Operations & Platforms
- Saikat Biswas, Global Head- Life Sciences, Energy & Utilities and Manufacturing iCORE Digital Operations & Platforms

Suite of services

- Drug discovery, research, and pre-clinical trials - data management and risk assessment
- Next-gen services – risk-based monitoring and EMR EDC integration
- Clinical trial & data services – biostats & programming, clinical data management, HEOR, RWE
- Manufacturing, supply chain, and distribution – order management, inventory management, logistics support, and blockchain enabled solutions
- Sales & marketing – data stewardship, master data management, sales force effectiveness, content lifecycle management, campaign management, and social media operations
- Regulatory and medical affairs – regulatory operations, labelling and artwork management, KOL management, scientific communications, medical content creations, and publishing
- E2E complaints management –complaint intake to regulatory submission, investigations including trend analysis and CAPA management, regulatory & vigilance reporting, and EU MDR & In-Vitro diagnostics services
- Automation & analytics services for pharma and medical device

1 12 months ending December 31 of any particular year, i.e., from January 1, YYYY to December 31, YYYY

Life sciences operations	2019 ¹	2020 ¹	2021 ¹
Revenue (US\$ million)	81	98	Not disclosed
Number of FTEs	2,100	2,800	Not disclosed
Number of clients	18	28	Not disclosed

Recent acquisitions and partnerships

- **2021:** partnered with Transcell Oncologics to develop NeuroSafe. It is a robust process automation-based platform, predicting the risk of neurovirulence at the workstation of vaccines production against benchmark datasets helping in cruelty free vaccine safety assessment
- **2021:** carved out the Adis Pharmacovigilance business from German Publication major Springer Nature and continues to provide all the services around regulatory literature monitoring that were offered by Springer Nature
- **2020:** partnered with ComplianceQuest to develop transformative quality management solutions for the medical devices and life sciences industries
- **2020:** partnered with Pharmalex, a leading provider of specialized services for the pharma, biotech, and medtech industries for augmenting the current PV services offering
- **2020:** partnered with Dodoc for automation in clinical data services
- **2020:** partnered with Witty Parrot, an intelligent communication & knowledge automation platform, to help in cloud-based SOP lifecycle management
- **2019:** partnered with Medidata for provisioning cutting-edge cloud platform to ensure highest standards, compliance, and value to its clients
- **2019:** partnered with Ontotext, for semantic search and knowledge graphs for pharma & medical devices literature management & litigation records management

Recent developments

- **2021:** performed pharmacovigilance activity globally for the top US global biopharmaceutical company, for their COVID-19 vaccine, a regulatory activity mandated by health authorities across nations
- **2021:** provided software as a service for a US-based major medical device company
- **2020:** improved contact center efficiencies for life sciences, medical devices companies to handle large call volumes during COVID-19
- **2020:** COVID-19 specific solutions in place for new and existing clients
- **2020:** launched Talosafe, an upgrade to existing Smartance platform for PV automation
- **2020:** developed customized PowerBI dashboards for complaints management projects
- **2018:** upgraded Wipro Holmes platform for email intake and literature search

Wipro | LS operations profile (page 2 of 6)

Key delivery locations

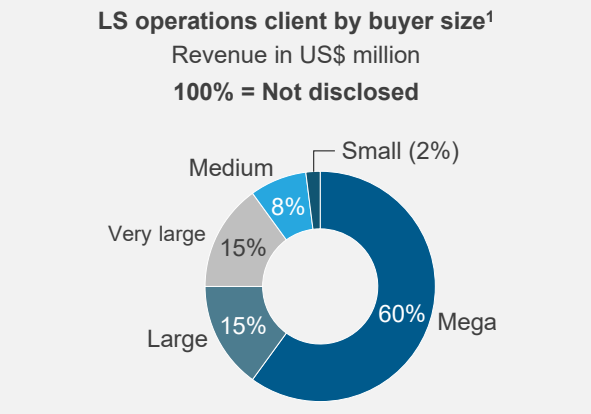
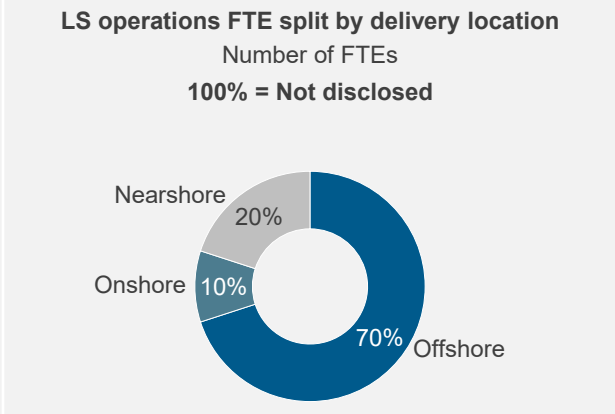
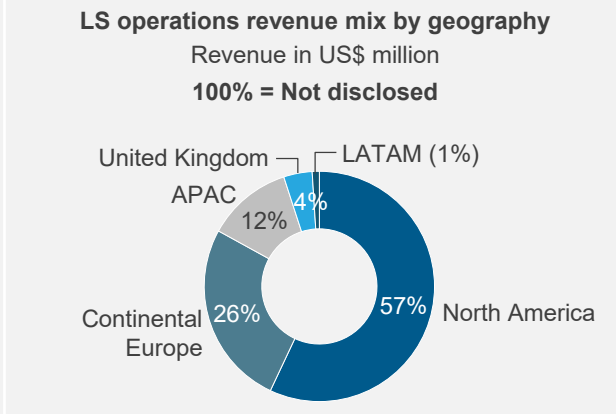
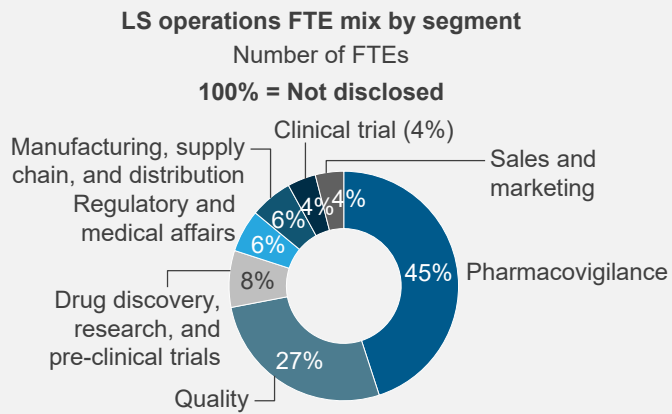


Wipro | LS operations profile (page 3 of 6)

Capabilities and key clients

Key life sciences operations engagements

Client name	Processes served	Region	Client since
A large EU-based capital equipment manufacturer	Complaints management and customer experience support	Europe	2021
A US-based medical technology company	Pharmacovigilance, regulatory compliance support, and quality	North America	2021
An EU- & US-based major medical devices company	Regulatory compliance support and quality	North America	2020
A top 5 global pharma company	Drug discovery, pharmacovigilance, quality, and clinical trial activities	Europe	2020
A top US global medical device company	Supply chain & distribution, pharmacovigilance, and quality	North America	2018
A top US global biopharmaceutical company	Pharmacovigilance, quality, and clinical trial activities	North America	2009
A top US global pharma, medical device, and consumer healthcare company	Manufacturing, pharmacovigilance, regulatory compliance support, and quality	North America	2016
An EU-based major pharma company	PV drug safety case processing, quality, and database migration	Europe	2015
A US-based medical device manufacturer	Pharmacovigilance, quality, reporting, marketing, and sales and analytics	North America	<2015
A US midsize global medical device and pharma company	Pharmacovigilance, quality, reporting, marketing & sales, and analytics	North America	<2015



¹ Buyer size is defined as mega (>US\$20 billion), very large (US\$10-20 billion), large (US\$5-10 billion in revenue), medium (US\$1-5 billion in revenue), and small (<US\$1 billion in revenue)

Wipro | LS operations profile (page 4 of 6)

Technology solutions/tools

Solution name	Processes served	Year launched	Description	No. of clients
NeuroSafe	Clinical trials, drug discovery, manufacturing, and compliance & quality	2021	NeuroSAFE is a robust process automation-based platform and is driven by Robotic Process Automation (RPA), artificial intelligence, a proprietary workflow engine, and operations management systems. It helps in cruelty free vaccine safety assessment.	1
TaloSafe	Clinical trials and pharmacovigilance	2020	It is a next generation pharmacovigilance platform (advanced version of Smartance) with abilities to do cognitive analysis of AE cases, into valid / invalid, perform causality analysis, perform auto triggered follow-ups for duplicity, correctness, and completeness of information.	21
CCI Agent	Clinical trials, pharmacovigilance, regulatory, and manufacturing operations	2019	It is an automation complaints management solution built on integrated automation approach, is led by combinations of tools, technologies, and techniques like artificial intelligence and machine learning including natural language programming, OCR, computer vision, and RPA tools.	3
Wipro-Medibot	Drug discovery, clinical trials, pharmacovigilance, manufacturing operations, supply chain, and sales & marketing	2019	It is used for medical information, complaints, and adverse events communication (chat) for patient, consumer, physician, or any other reporter for sharing the information / details to be captured.	3
Wipro-Voice to text (VTT)	Drug discovery, clinical trials, pharmacovigilance, manufacturing operations, supply chain, and sales & marketing	2018	It supports all the voice scripts coming from call centers and converts the voice to text in a structured format that can be utilized by TaloSafe or customer tools for the purpose of processing.	4
Smart Scripts	Regulatory compliance	2018	Coding text analytics to capture reportable keywords for workload prioritization.	2
Base))) Harmony	This solution supports all the processes across the life sciences value chain	2018	It is a web-based knowledge capture and program management tool.	4
MDR auto-auditor tool	Regulatory compliance	2017	It aids quality audits of the Medical Data Reporting (MDR) regulatory reports, tool highlights any mismatches from complaint fields vs report fields so it can be rectified before submission to FDA.	2
Power BI - SLA & KPI management	Clinical, pharmacovigilance, PMS, marketing and sales, and manufacturing	2017	It offers end-to-end visibility across business operations and provides dashboard reporting to leadership and operations (including team level status updates).	5
Social Sentiment Analytics	Pharmacovigilance and marketing and sales	2017	It makes social media analysis process quicker and easier by automating social feed monitoring to identify trends in customer sentiments, emotions, and responses to marketing events.	1
Holmes AI-based automation solution	Clinical, pharmacovigilance, PMS, marketing and sales, and manufacturing	2016	It is an AI-based automation platform coupled with multiple technologies.	10

Wipro | LS operations profile (page 5 of 6)










Technology solutions/tools

Solution name	Processes served	Year launched	Description	No. of clients
Digital Key Opinion Leaders (KOL)	Clinical, pharmacovigilance, PMS, marketing and sales, and manufacturing	2015	It automatically extracts, inferences, and presents KOL data in easy dashboards format and gives outside-in perspective to business with ability to influence key strategic initiatives.	1
CMS audit tool	This solution supports all the processes across the life sciences value chain	2016	It is used for digitized internal project audit.	5
Auxilium	Pharmacovigilance	2014	It is used for complaint intake and processing for legal complaints.	1
Reportum	Pharmacovigilance	2014	It is used to digitized adverse event intake platform.	1
ColossusNxtGen	This solution supports all the processes across the life sciences value chain	2014	It is a transactional quality audit tool.	5

Wipro | LS operations profile (page 6 of 6)

Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact				Vision & capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
								

Strengths

- Wipro has experienced a high double-digit revenue and client growth in 2021 and has added a significant number of FTEs in its life sciences operations
- Wipro, through its platform solutions such as Talosafe and Harmony, covers the entire life sciences value chain from clinical trials, supply chain, commercial operations, PV, regulatory affairs, and quality
- Wipro has a diversified client portfolio with a heavy mix of both biopharma and medical devices
- The company continues to enhance its technology and services portfolio via in-house investments (launched automation PV solution – Talosafe), inorganic routes such as managed services engagements (Regulatory Literature Monitoring Services from Springer Nature), and partnerships (including ComplianceQuest for quality management and Ontotext for literature search)
- Clients highlight its faster TAT, responsiveness, and flexibility as areas of key strengths

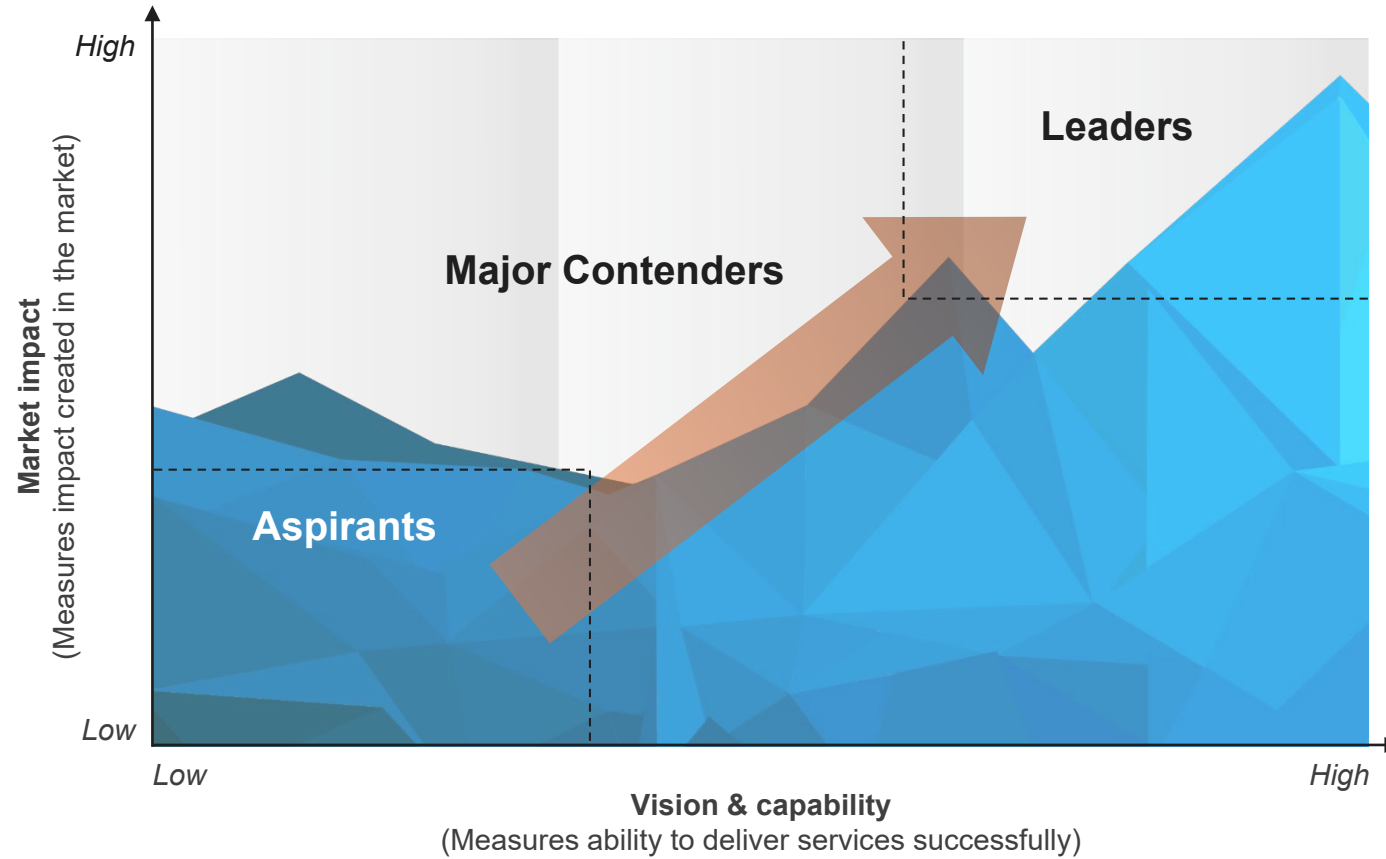
Limitations

- Wipro’s client base is skewed toward large enterprises. It has a very limited presence in the small (<US\$1 billion) buyer segment
- When compared with other leaders, Wipro’s business footprint in the UK market is limited

Appendix

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

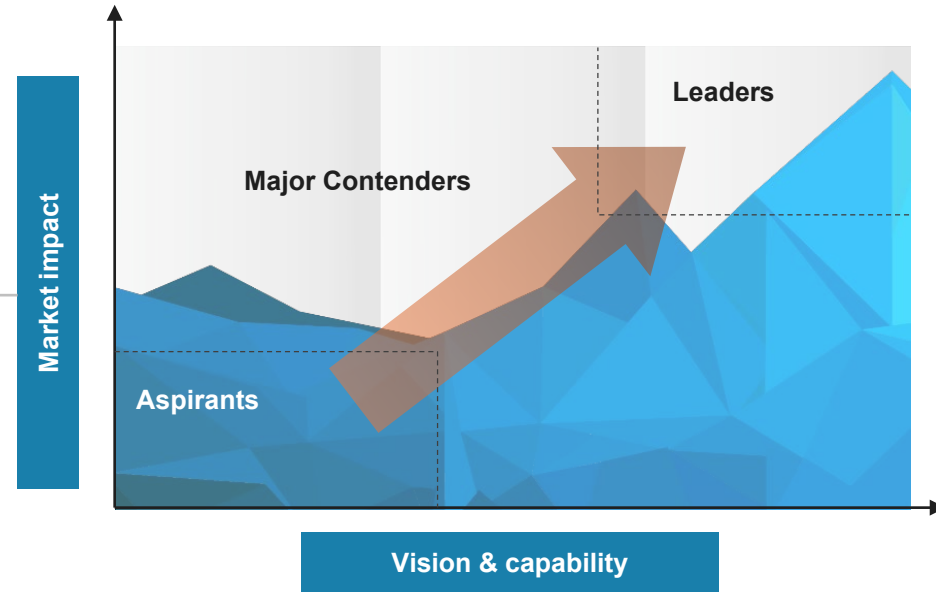
Everest Group PEAK Matrix



Services PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

- Market adoption**
Number of clients, revenue base, YoY growth, and deal value/volume
- Portfolio mix**
Diversity of client/revenue base across geographies and type of engagements
- Value delivered**
Value delivered to the client based on customer feedback and transformational impact



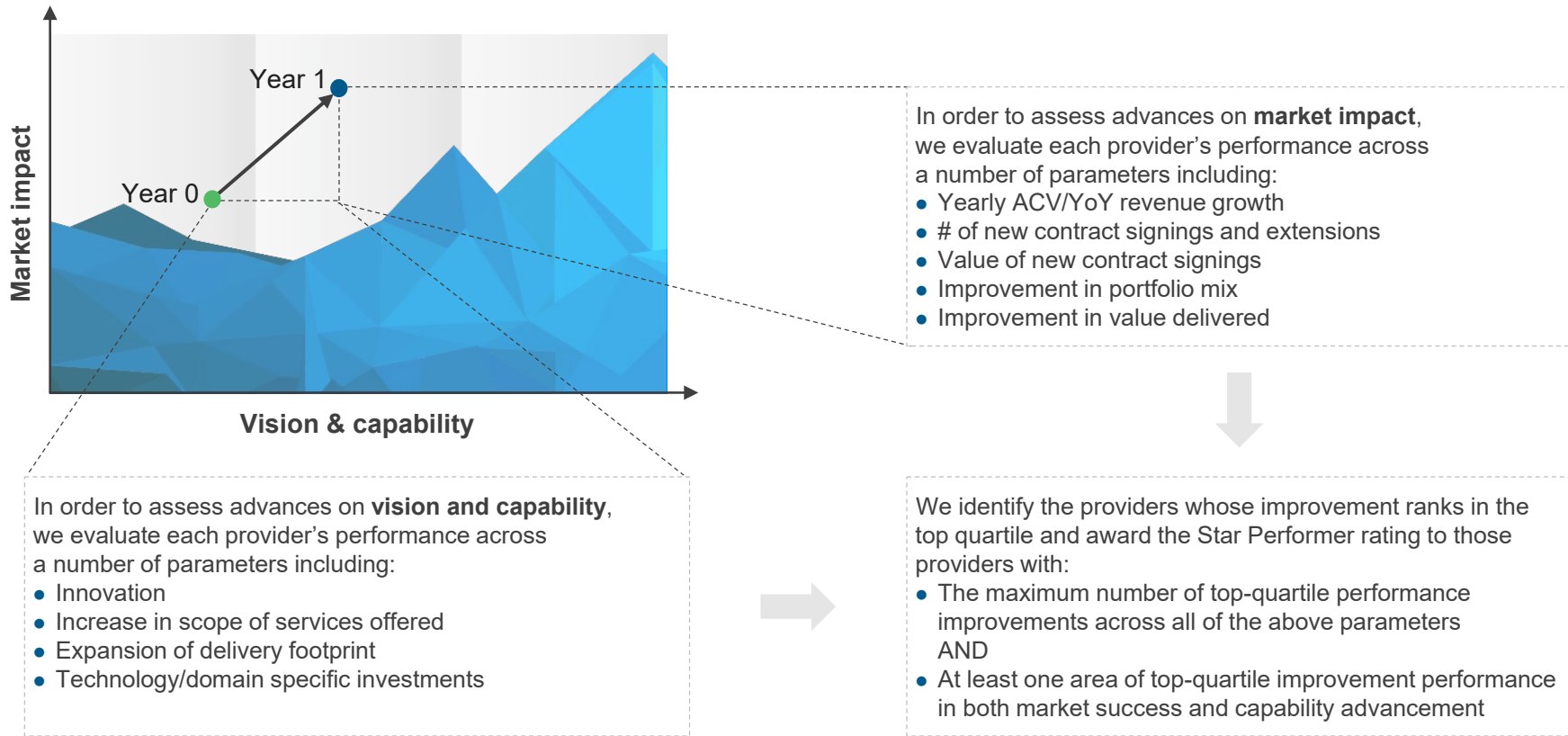
Measures ability to deliver services successfully. This is captured through four subdimensions

- 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 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 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 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 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



Everest Group[®]

With you on the journey

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