

Life Sciences Digital Services

Manufacturing Supply Chain Digital Transformation Services

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Global. 2021

Quadrant Report A research report comparing provider strengths, challenges and competitive differentiators

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Customized report courtesy of:

December 2021



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About this Report

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The research and analysis presented in this report includes research from the ISG Provider Lens[™] program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of September 2021, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars (\$US) unless noted.

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ISG Provider Lens[™] delivers leading-edge and actionable research studies, reports and consulting services focused on technology and service providers' strengths and weaknesses and how they are positioned relative to their peers in the market. These reports provide influential insights accessed by our large pool of advisors who are actively advising outsourcing deals as well as large numbers of ISG enterprise clients who are potential outsourcers.

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EXECUTIVE SUMMARY

Digital: The New Engine Behind The Life Sciences Business

As the world moved into year two of the COVID-19 pandemic, all segments of the life sciences industry showed dramatic strategy and process adaptations to the new normal. The adoption of digital technologies to facilitate the pace of change and deliver competitive advantage and increased efficiencies provided the foundation for much of this new way of working. Significant mergers and acquisitions focused on enabling rapid scale-up of digital expertise and innovation. Challenges such as the need to rapidly implement telemedicine and enable direct-to-patient data collection while maintaining cybersecurity have put new constraints on technology providers and have increased demands for digital solutions. Added to this are challenges that, while not always specific to the life sciences industry, have a significant impact on business continuity and profitability. These include the implementation of digital clinical trials, dramatically increased levels of patient engagement, supply chain dysfunction and increased dependence on AI, machine learning (ML) and automation to enhance operations in MedTech, pharmacovigilance and regulatory affairs.

The Leaders in each of these quadrants were able to rapidly implement digital solutions as a result of their existing investments and strategies focused on developing digital offerings prior to the pandemic. Some of these firms leveraged solutions they were already providing in other sectors to support the sudden shift to digital in the life sciences industry. Some providers that are purely life sciences service-oriented, such as the leading global contract research organization (CROs), or those that have developed substantial life science-specific offerings, were already deeply invested in digital roadmaps based on their own understanding of where the market would need to go to achieve necessary efficiencies and economies of scale. The pandemic provided the impetus for the industry to meet these Leaders at a point of delivery that might otherwise have taken several more years to attain.

The increased reliance on digital technologies is associated with other trends across the life sciences quadrants evaluated. There is an increased demand for cloud services in the industry to support the needs of a growing remote workforce and for additional computing power. Changing business needs have also elevated the demand for Software as a Service (SaaS) solutions that can rapidly provide digital power in expert domains and facilitate turning large volumes of data into business intelligence. In addition to investments in technology, services, tools and skillsets, interest and sophistication in the use of advanced analytics, Al and automation is rapidly rising to expert levels across



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Executive Summary

the talent continuum, not just within IT. The new face of the customer is a digitally-savvy subject matter expert (SME), and providers that can exceed this customer's expectations are the Leaders in their respective quadrants. The quadrant trends are highlighted below.

Within the **Clinical Development** quadrant two major trends — digital clinical trials and the advantages of implementing advanced analytics — require both CROs and technology providers to offer standardized, but customizable, solutions that clients can rapidly implement. Leaders in this quadrant, such as Accenture, Capgemini, Cognizant, HCL, IQVIA, PPD, TCS and Wipro, also offer strong change management support and active measures of early and ongoing success. Hexaware is a Rising Star.

With the overarching goal of improving patient experience and outcomes, digital services providers in the **Patient Engagement** quadrant have been focusing on remote monitoring, using devices, wearables, sensors and smart pills as some of the direct-to-patient ways to help ensure compliance and patient retention. Leaders in this quadrant, which include Atos, Capgemini, Cognizant, HCL, Hexaware, IQVIA, PPD, TCS and Wipro demonstrate deep knowledge of digital enablement, regulatory requirements and the patient experience. Verizon is a Rising Star.

Well-documented supply chain and logistics challenges have raised the demand for business intelligence in the **Manufacturing Supply Chain quadrant.** The use of sensors to monitor real-time shipping data, combined with expertise in advanced analytics sets apart Leaders such as Accenture, Atos, Capgemini, Cognizant, HCL, TCS and Wipro. LTI is a Rising Star.

Collaborations between traditional IT providers and global CROs, often including representation from industry and academia, continue to grow as the leading providers in these areas leverage their combined expertise. The emphasis on improving patient outcomes by combining deep domain expertise with digital enablers is seen among all the Leaders in these quadrants. The accelerated pace of change demanded as a result of the COVID-19 pandemic has created so many new points of entry that Leaders are increasingly pursuing multiple models to expand their capacity for innovation.

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Introduction

		Simplified illustration					
Life Sciences Digital Services 2021							
Clinical Development Digital Transformation Services	Patient Engagement Digital Transformation Services	Manufacturing Supply Chain Digital Transformation Services					

Source: ISG 2021

Definition

The life sciences industry is under increasing pressure to change. The COVID-19 pandemic and public demand for more effective outcomes are mandating the acceleration of actions needed to better meet care lifecycle requirements and build patient-centric business models. All segments of the industry are being compelled to comply with new regulations and to deal with emerging sources of competition, integrate waves of competitive mergers and acquisitions, and adapt to the needs of an aging population. The efforts required to deal successfully with each of these challenges are expensive. At the same time, consumers are increasingly expecting advanced and convenient digital service delivery. Life sciences companies are increasingly relying on innovation to stay apace with the rising demand for their services and mounting competitive pressures.



Definition (cont.)

As new business approaches take hold, regulatory hurdles and cost pressures will continue to be higher and more complex. The competitive landscape has never been more dynamic and global. In this context, innovation is imperative. Biopharma companies, CROs and other life sciences ancillary suppliers will face increasing pressures to expand and extend current investments. MedTech companies should continue to focus on the efficiency of the supply chain and recognize that innovation is the key to growth and survival.

Successful organizations in the life sciences industry have been meeting these challenges with the following:

- Driving targeted investments and constant cost control
- Using advanced technology and digital operating models as a platform for transformation
- Focusing on improved and innovative patient engagement
- Optimizing supply chain operations

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Digital transformation helps address many of the current and anticipated industry challenges. In the life sciences industry, digital transformation services are already playing a key role across multiple areas to help accelerate clinical development. Digital transformation is also making fundamental changes to how pharmacovigilance and regulatory affairs activities are conducted. Furthermore, recent technology trends such as connectivity, including mobile enablement or advanced analytics, provide innovation opportunities for MedTech companies. As the impact of COVID-19 has shifted the concept of "customer" more directly onto the patient, life sciences enterprises are increasingly relying on digital transformation to conduct their operations, support regulatory obligations and help ensure business outcomes.

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Definition (cont.)

Scope of the Report

While many organizations may initially pilot digital solutions with internal resources, the need for expertise, scale, innovation, flexibility and cost efficiency often point toward an outsourced solution. This study focuses on accelerated clinical development, patient engagement and manufacturing supply chain services.

Participating service providers are evaluated on how they are an extension of a client's technology organization and involved in creating blueprints, architecture frameworks and management processes. They are also measured on factors such as brand recognition in the markets under study, market reach and the number and quality of clients. They are evaluated on thresholds of annual revenue, assigned professionals (resources) and R&D investments.

The ISG Provider Lens[™] study offers technology decision-makers the following:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments
- Perspective on different markets, including global, the U.S. and EU

Our study serves as an important decision-making basis for positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current vendor relationships and potential engagements.

Introduction

Provider Classifications

The provider position reflects the suitability of IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions IT providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- Midmarket: Companies with 100 to 4,999 employees or revenues between US\$20 million and US\$999 million with central headquarters in the respective country, usually privately owned.
- Large Accounts: Multinational companies with 5,000 or more employees or revenue above US\$1 billion, with activities worldwide and globally distributed decision-making structures.



Provider Classifications

The ISG Provider Lens[™] quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly.

Leader

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Product Challenger

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Market Challenger

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

Contender

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in both products and services and a sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.



Provider Classifications (cont.)

Each ISG Provider Lens[™] quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star. Number of providers in each quadrant: ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

Rising Star

Rising Stars have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of aboveaverage market impact and strength of innovation.

Not In

The service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

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Life Sciences Digital Services - Quadrant Provider Listing 1 of 2

	Clinical Development Digital Transformation Services	Patient Engagement Digital Transformation Services	Manufacturing Supply Chain Digital Transformation Services	
Accenture	Leader	Market Challenger	Leader	
Apexon	Contender	Product Challenger	Not in	
Atos	Market Challenger	Leader	Leader	
Birlasoft	Contender	Product Challenger	Product Challenger	
Capgemini	Leader	Leader	Leader	
CGI	Not in	 Contender 	Contender	
Cognizant	Leader	Leader	Leader	
Conduent	Not in	Product Challenger	Not in	
DXC	Not in	Market Challenger	Product Challenger	
Genpact	Not in	Product Challenger	Market Challenger	
Harman	Market Challenger	Market Challenger	 Contender 	
HCL	Leader	Leader	Leader	
Hexaware	Rising Star	Leader	Not in	
IBM	Market Challenger	Not in	Not in	



Life Sciences Digital Services - Quadrant Provider Listing 2 of 2

		Clinical Development Digital Transformation Services	Patient Engagement Digital Transformation Services		Manufacturing Supply Chain Digital Transformation Services	
ICON	•	Market Challenger	•	Product Challenger	•	Not in
IQVIA	٠	Leader	•	Leader	•	Not in
LTI		Not in	•	Product Challenger	•	Rising Star
Mphasis		Contender		Contender	•	Product Challenger
NTT DATA	•	Product Challenger	•	Product Challenger	٠	Product Challenger
Persistent		Contender	•	Product Challenger	•	Product Challenger
PPD	٠	Leader	•	Leader	•	Not in
Stefanini	•	Not in	•	Product Challenger	٠	Product Challenger
TCS	٠	Leader	•	Leader	٠	Leader
Tech Mahindra	•	Product Challenger	•	Product Challenger	٠	Product Challenger
Verizon	•	Not in	•	Rising Star	•	Not in
Wipro	٠	Leader	•	Leader	٠	Leader
Zensar	•	Not in	•	Product Challenger		Contender



Life Sciences Digital Services Quadrants

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ENTERPRISE CONTEXT

Manufacturing Supply Chain Digital Transformation Services – Global

This report is relevant to enterprises across industries for evaluating providers of digital transformation services for the manufacturing supply chain.

In this quadrant report, ISG highlights the current market positioning of providers that offer digital transformation services for the global manufacturing supply chain.

Due to the restrictions imposed because of COVID-19, managing the supply chain of an organization, particularly one that is spread geographically, and encompasses many different regulatory structures, has become a challenge. Global life sciences supply chains are long and complex, and shaped by many internal and external factors. Failure of any kind in this supply chain can affect a company adversely, in terms of immediate loss of revenue from delayed product launches, remediation costs and long-term damage to credibility.

Organizations are accelerating the digital transformation of their logistics by focusing on real-time order monitoring, end-to-end inventory visibility and super-reverse logistics experiences. For instance, at the peak of the COVID-19 pandemic, a leading pharma company used a digital-twin to understand the impact of production slowdowns and shutdowns on the supply of patient medication.

As digital technologies continue to advance, life sciences companies have the opportunity to create supply chains that are increasingly cost-effective and responsive to emerging needs

Life science leaders should read this report to understand the relative positioning and capabilities of providers, enabling them to select the appropriate services and solutions related to manufacturing and supply chain more effectively.

Start-up digital health innovators should read this report to understand the leading and emerging areas of investment, challenges faced by manufacturing and supply chain innovators and the key to long-term success for innovators.

Pharma and MedTech companies should read this report to develop a deeper understanding of end-user solutions and create business models that enhance patient outcomes and create value for key healthcare stakeholders, while ensuring manufacturing and supply chain efficiency, guality, and compliance.

Security and R&D leaders should read this report to learn how service providers address the significant challenges of compliance and security, while maintaining a seamless experience for end users.



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IT and digital transformation professionals should this report to understand how providers of manufacturing and supply chain services fit into their existing digital transformation initiatives and how they can be compared with one another.

Sourcing, procurement and vendor management professionals should read this report to develop a better understanding of the current landscape of manufacturing and supply chain service providers.

Enterprise Context



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MANUFACTURING SUPPLY CHAIN DIGITAL TRANSFORMATION SERVICES

Definition

This quadrant assesses service providers that work with their clients in life sciences to improve the manufacturing supply chain. Disruptions in the manufacturing supply chain because of the COVID-19 pandemic are now well known. There have been shortages in personal protective equipment (PPE) and COVID-19 testing and treatments worldwide. In some regions, there are changes or reductions in in-person inspections by regulatory overseers and in reporting requirements. For an industry dependent on ingredients from across the globe, the disruption of supply chains is a major challenge. The pandemic has led to a series of disruptions because of restrictions in movement. ISG expects a shift to localization of supply chains to reduce risks.

Manufacturers use sensors for monitoring equipment health and predicting maintenance needs to reduce downtime. Many aspects of the manufacturing supply chain rely heavily on collaborative engagement between companies, and technology often provides the



Source: ISG Research 2021



MANUFACTURING SUPPLY CHAIN DIGITAL TRANSFORMATION SERVICES

Definition (cont.)

most effective mechanism to engage across incompatible systems or processes. Appropriate analytics and AI are required to move inventory quickly to the desired location. Blockchain helps maintain the chain of custody that is important in life sciences.

Despite the advent of advanced technologies such as automation and AI, making accurate forecasts on shipments is an ongoing challenge for logistics managers. Visibility in the supply chain is hampered by expensive and variable manual processes that reduce the accuracy of the forecast. Often, historical data needed for efficient planning is unavailable or tied up in inaccessible legacy systems. Logistics managers also struggle to provide accurate and real-time estimated times of arrival because of the complexity of the current transportation logistics.

Eligibility Criteria

- Capabilities in assessing existing supply chains and recommending strategy, process and technology changes to improve efficiencies, lower risk and reduce costs
- Ability to transform manufacturing through digital and IoT, using a variety of automatic identification and data capture (AIDC) technologies
- Adept at providing real-time visibility in logistics, using sensors connected to systems that get status information (such as location or temperature) to the right people rapidly, while also changing routes as required and predicting problems
- Ability to provide solutions for complex supply chain structures, including complex connectivity with contract manufacturing and advanced technologies to track and trace
- Established or emerging partnerships with manufacturing supply chain specialists in life sciences and relevant technology providers
- Expertise in import/export compliance



MANUFACTURING SUPPLY CHAIN DIGITAL TRANSFORMATION SERVICES

Observations (cont.)

A most effective supply chain requires full integration across all relevant functional levels. An important factor in this area is the ongoing integration between the enterprise resource planning (ERP) level and the level of production and process control, usually called the shopfloor level. Most of the important service providers in this segment have built respective capabilities in the recent years. In some cases, this was achieved by considerable acquisition activities. Another aspect worth mentioning is the strong interrelation between manufacturing functions and product development and lifecycle management functions. A lot of data needed in manufacturing have their origin in these upfront functions.

Many aspects of the manufacturing supply chain rely heavily on collaborative engagement among companies, and technology often provides the most effective mechanism to engage across incompatible systems or processes. Appropriate analytics and AI are required to move inventory quickly to the desired location. Blockchain helps maintain the chain of custody that is important in life sciences. Service providers need to exhibit strong capabilities supporting these aspects.

The following providers have achieved a Leader position in this quadrant:

- Accenture traditionally has a strong focus on strategy development and business process design within its service portfolio. Broad experience in life sciences enables the company to adequately offer its services in the regulated environment of this industry.
- Atos can refer to comprehensive capabilities in ERP implementation, particularly for environments with a large degree of manufacturing functionalities. Within its portfolio Atos addresses the transfer of technologies and data among the various functions within the lifecycle of a life sciences product.
- Capgemini, with its Smart Factory Model, offers powerful solutions along the entire supply chain, from planning functionalities over the manufacturing executions to the various aspects around physical logistics. The acquisition and fast integration of engineering services provider, Altran, has significantly increased Capgemini's capabilities in IoT-enabled solutions for integrating sensors, smart devices, wearables and other components.

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MANUFACTURING SUPPLY CHAIN DIGITAL TRANSFORMATION SERVICES

Observations (cont.)

- Cognizant can leverage its deep expertise in manufacturing technology and related software packages, especially SAP ERP, to develop and maintain powerful solutions in the manufacturing supply chain segment. Following the acquisition of Zenith Technologies, a company focused on supply chain functions on the plant level, Cognizant further enhanced its smart manufacturing offerings with the acquisition of TQS Integration, a global industrial data and intelligence company, based in Ireland.
- HCL offers a variety of accelerators, designed and developed specifically for the life sciences industry. An important example is the Base90 solution, which is an SAP S/4HANA template, designed particularly for meeting the requirements of life sciences customers. HCL uses various technologies such as radio frequency identification (RFID), Bluetooth and QR Codes to track assets within the supply chain.

Manufacturing Supply Chain Digital Transformation Services

- TCS's portfolio, apart from capabilities in ERP and manufacturing, includes solutions for specific functions such as predictive maintenance of plant equipment and instruments. TCS offers strong capabilities to transfer information from process development for new products to the commercial manufacturing area using a product lifecycle management (PLM)-based collaboration platform.
- Wipro can rely upon deep expertise in all aspects of ERP to support manufacturing and supply chain functionalities, specifically for SAP S/4HANA. With its Supply Chain & Manufacturing IQ (MIQ) solution Wipro provides a cloud-based suite of manufacturing intelligence applications for the use of advanced analytics on critical operating parameters regarding production, quality, maintenance and the supply chain.

The following provider positioned itself as a Rising Star in this quadrant and exhibits the potential to "achieve a Leader position in the future:"

 LTI's portfolio follows a clear strategy and focuses on specific segments such as manufacturing in the life sciences industry. It has comprehensive capabilities regarding common ERP packages like SAP S/4HANA and focuses specifically on manufacturing functions, including the manufacturing execution system (MES) level and the supply chain.



Manufacturing Supply Chain Digital Transformation Services

HCL



HCL Technologies is a technology company that offers software, IT infrastructure and business process outsourcing (BPO) services worldwide. The company also offers hybrid clouds, digital workplace and cloud native services, together with service integration and management. It was founded in 1976 and has its headquarters in Noida, India. HCL has more than 187,600 employees across 50 countries and, in recent years, has expanded



Solutions for demand and supply planning should be extended because life sciences supply chains are often long and call for extensive optimization.



its footprint in the life sciences industry.

Compelling suite of industry-specific accelerators: HCL offers a variety of accelerators that were designed and developed specifically for the life sciences industry. An important example is the Base90 solution, which is an SAP S/4HANA template, designed specifically for the requirements of life sciences customers. It serves as the backbone for a digitally transformed manufacturing supply chain and is complemented by developments such as contract manufacturing and quality platforms. Furthermore, with the RMI solution for real-time manufacturing insights, HCL facilitates plant efficiency monitoring with user-defined key performance indicators (KPIs), role-based customizable views for the management level and role-based visualization dashboards.

Strong partner ecosystem: HCL maintains a broad ecosystem of technology partners, covering all types of applications, from enterprise level to the plant and control level, including quality management.

Smart use of tracking technologies: HCL uses various technologies such as RFID, Bluetooth and QR Codes to track assets in the supply chain. Mechanisms such as autonomous vehicles, automated storage retrieval and robotic palletizers are available for handling physical goods.

2021 ISG Provider Lens[™] Leader

HCL is an excellent partner for manufacturing supply chain digital transformation and has a compelling suite of industry-specific accelerators for the life sciences industry.



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METHODOLOGY

The research study "ISG Provider Lens[™] 2021 – Life Sciences Digital Services" analyzes the relevant software vendors/service providers in the Global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

The study was divided into the following steps:



- 1. Definition of Life Sciences Digital Services 2021 market
- 2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
- 3. Interactive discussions with service providers/vendors on capabilities and use cases
- 4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)

- 5. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
- 6. Use of the following key evaluation criteria:
 - Strategy & vision
 - Innovation
 - Brand awareness and presence in the market
 - Sales and partner landscape
 - Breadth and depth of portfolio of services offered
 - Technology advancements

Authors and Editors



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Lead Analyst

Frances Grote joined the ISG IPL Life Sciences team in 2021. Prior to this, she led ISG's Life Sciences Digital Drug Development practice, which she helped to design and establish in 2016. Frances has over 25 years of experience in leading global biopharma R&D Strategic Sourcing organizations, prior to joining ISG. She is a recognized innovator in building supplier partnerships in drug development as well as in implementing digital technologies in biopharma R&D. She holds an MBA with a focus on Strategic Planning and has completed graduate training in negotiations.



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Lead Analyst

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Jan Erik Aase, Editor

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Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor. Now as a research director, Partner and Global Head - ISG Provider Lens[™], he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.



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