



Everest Group Life Sciences Digital Services PEAK Matrix® Assessment 2025

Focus on HCLTech

July 2025



Introduction

As life sciences enterprises navigate a complex and evolving business landscape, the adoption of digital technologies has become a cornerstone of their strategic growth. Emerging challenges such as global economic volatility, evolving regulatory frameworks, and increased competition in drug development and commercialization are compelling organizations to rethink their digital transformation roadmaps. In response, enterprises are prioritizing the integration of advanced technologies such as data, analytics, and Artificial Intelligence (AI) / gen AI across the life sciences value chain, with a major focus on faster and more successful time-to-market, unlocking operational efficiency and delivering personalized customer experience.

To support this shift, service providers are enhancing their capabilities through targeted investments in industry-specific solutions, co-innovation initiatives, and talent development. As the demand for digital services continues to accelerate, enterprises are seeking partners with deep domain expertise, agility, and a proven track record in delivering scalable and transformative solutions.

In the report, we present an assessment of 35 service providers featured on the [Life Sciences Digital Services PEAK Matrix® Assessment 2025](#). The assessment is based on Everest Group's annual Request for Information (RFI) process for the calendar year 2024, interactions with leading life sciences digital service providers, client reference checks, and an ongoing analysis of the medical devices digital services market.

The full report includes the profiles of the following 35 leading life sciences digital service providers featured on the life sciences digital services PEAK Matrix:

- **Leaders:** Accenture, Capgemini, Cognizant, HCLTech, Infosys, TCS, and Wipro
- **Major Contenders:** Agilisium, Altimetrik, Atos, Birlasoft, Brillio, CGI, CitiusTech, Deloitte, Emids, EPAM, Genpact, HARMAN, IBM, LTIMindtree, Nagarro Inc., NNIT, NTT DATA, Persistent Systems, Tech Mahindra, Virtusa, and Zensar
- **Aspirants:** Apexon, Coforge, EZEN, Orion Innovation, SoftServe, Stefanini, and WinWire

Scope of this report

Geography: global

Industry: Life sciences (biopharmaceutical, medical devices, and others)

Services: Digital services

Life Sciences Digital Services PEAK Matrix® characteristics

Leaders

Accenture, Capgemini, Cognizant, HCLTech, Infosys, TCS and Wipro

- Leaders, whether possessing broad expertise in end-to-end solutions or specialized knowledge in niche areas, offer in-depth digital services across various life sciences functions, including drug discovery, clinical development, manufacturing, supply chain, and commercial activities, thereby establishing strong brand recall
- They maintain a global delivery footprint, serving a wide range of clients from emerging pharmaceutical companies and start-ups to established global providers, supported by a robust network of partnerships with system integrators, software providers, technology specialists, and service providers
- Leaders are recognized for their proactive approach to delivering innovative, next-generation services, showcasing impactful use cases in areas such as Decentralized Clinical Trials (DCTs) and precision medicine, thereby positioning themselves as thought leaders and strategic partners in the life sciences industry

Major Contenders

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- Major Contenders are investing in next-generation technologies such as AI, Machine Learning (ML), Natural Language Processing (NLP), and High Performance Computing (HPC), challenging Leaders in specific areas with their advanced capabilities, rather than tackling multiple fronts
- These providers comprise a diverse mix of global SPs, large and midsize firms, and life sciences specialists. While some utilize partner networks for implementation and customization services, many rely on their internal teams, leading to varied approaches to service delivery
- Major Contenders exhibit deep expertise in specific functional areas within the life sciences domain (for example, medical devices, clinical R&D, and sales and marketing) but need to improve the breadth of their digital offerings across the entire life sciences value chain to compete more effectively with Leaders

Aspirants

Apexon, Coforge, EZEN, Orion Innovation, SoftServe, Stefanini and WinWire

- Aspirants provide specialized point solutions tailored to specific use cases within the biopharmaceutical and medical device value chains, targeting niche areas with precision
- To expand their market reach and serve a wider range of buyer segments, Aspirants need to invest strategically in partnerships or develop internal IP and tools, thereby enhancing their overall capabilities
- With a dedicated focus on the relatively less competitive small and midsize buyer segments, Aspirants are making selective investments in Centers of Excellence (CoEs) and strategic partnerships to build niche expertise, though they currently lack significant proof points to gain broader client confidence

HCLTech profile (page 1 of 7)

Overview

Company mission/vision statement for life sciences digital services

HCLTech intends to accelerate digital transformation in the life sciences business by incorporating sophisticated technologies such as data analytics, automation, cloud, cybersecurity, AI, and generative AI. This allows businesses to quickly modify their business and operating models to suit changes in company strategy, meet changing regulatory demands, and assure compliance and traceability. It provides organizations with specialized solutions that unlock the power of innovation and personalized medicine.

Overview of the client base

HCL has global engagements including all the top 10 biopharma businesses, nine of the top ten MedTech enterprises, three of the top five CROs, prominent animal health organizations, and other leading global life sciences organizations.

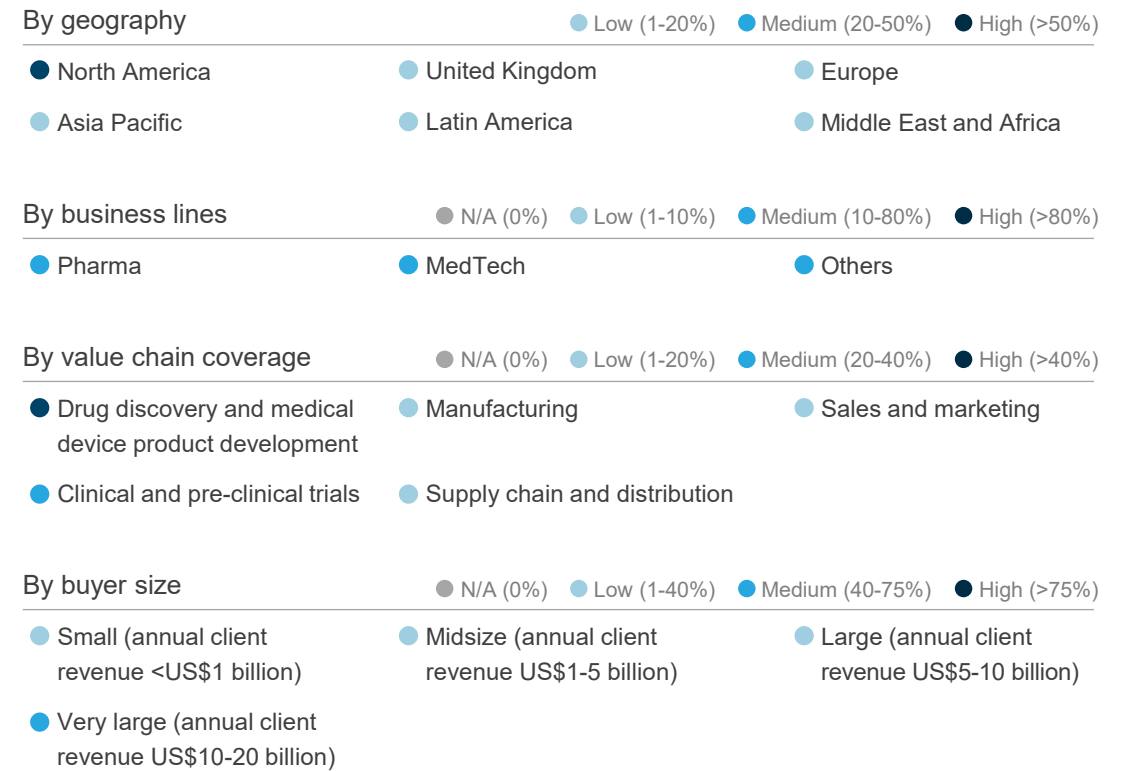
Life sciences digital services revenue

<US\$50 million	US\$50-150 million	US\$150-250 million	>US\$250 million
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Scope of digital services

Its services include digital products and platforms, big data and analytics, IoT, mobility, cloud, social media, AI/ML/cognitive, blockchain, cybersecurity, interactive, UX, VR/AR, and 3D printing.

Life sciences digital services revenue mix



HCLTech profile (page 2 of 7)

Case studies

CASE STUDY 1

Enhanced drug forecasting with AI, achieved 95% predictability, and optimized supply chain efficiency

Business challenge

The client needed to improve drug forecasting in a timely manner due to sudden increase in demand. The existing processes lacked advanced analytical capabilities, resulting in delays and inefficiencies. There was a critical need for improved predictive modeling, better UI and visualizations, and real-time dashboards that could reflect operational changes within hours while maintaining data accuracy. The client sought AI-enabled solutions to enhance forecasting and support data-driven decision-making.

Solution and impact

HCLTech developed an analytics roadmap to prioritize and sequence opportunities. Automated data preparation streamlined onboarding of new sources, reducing manual efforts. Advanced analytics tools were implemented for better results, alongside visual dashboards with alerts, nudges, and recommendations for effective decision-making. Dashboards were customized for executives, BU heads, and managers with self-service BI capabilities. These enhancements led to a 95% success rate in improved predictability, ensuring better drug availability and optimized supply chain management.

CASE STUDY 2

Optimized patient recruitment and site identification through AI-driven analytics, reducing timelines and enhancing clinical trial efficiency

Business challenge

The client's manual processes in patient recruitment and site identification for clinical trials were time-consuming and inefficient. Accessing historical patient data required third-party intervention, further delaying trial initiation. This lack of streamlined data access and analytics capabilities hindered the identification of suitable patients and sites across therapeutic areas, impacting the overall efficiency of clinical research. A cloud-based solution was needed to enhance accessibility, automate processes, and accelerate patient recruitment.

Solution and impact

HCLTech implemented a cloud-based patient recruitment analytics platform using agile methodology, integrating historical and third-party patient data. AI-driven search capabilities enabled efficient identification of patients and sites based on inclusion/exclusion criteria. E-mail campaigns facilitated pre-screening, while e-consent management improved patient participation. AI-orchestrated processes optimized patient matching and recruitment. As a result, over 100 million patient records were leveraged, significantly reducing recruitment timelines and enhancing efficiency across all therapeutic areas.

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Frameworks

[REPRESENTATIVE LIST] [NOT EXHAUSTIVE]

Consultative frameworks

Framework	Details
EQuIP™	It is a proprietary solution to get insights, from data gathering and management to data quality.
Dynamic Ecosystem of Connected Devices (DECoDe)	It is a connected ecosystem solution that includes solutions for modernizing legacy lab assets and bringing them on enterprise dashboards.
ValU™	It is an innovative digital validation and testing solution framework.
Quality Event Initiation (QEI)	It provides a comprehensive solution for digital quality management demands.
Patient Assistance Platform	It is a single modular system that orchestrates the end-to-end process and enables business services to improve the patient experience.
Data Integration as a Service (DIAAS)	It is a platform that provides clinical and non-clinical data integration, extraction, conversion, transformation, harmonization, and controlled terminology mapping in compliance with CDISC standards and FDA data submission requirements.
Knowledge Graph for Life Sciences	It is a framework for life sciences, which is designed to enhance various aspects of the life sciences industry by leveraging generative AI and knowledge graph technologies.
ADViso	Its MDM testing framework provides a solution for testing the quality of data in a very effective way.

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Proprietary solutions

[REPRESENTATIVE LIST] [NOT EXHAUSTIVE]

Proprietary solutions for life sciences digital services

Solution/Accelerator name	Value chain	Details
DigitalColleague	N/A	It is a platform that enables hyper-automation and generative AI adoption at scale across the enterprise.
HCLTech Health InFusion Proctor	N/A	It is a digital solution that combines Salesforce field service and health cloud features, providing patients, payers, and insurance providers with easy access to health data while adhering to regulatory standards for data privacy.
Zero-touch virtual voice assistant for better patient engagement	N/A	It is a zero-touch enabler for patients, care providers, and practitioners to connect information and guidance centers in a human-free manner, delivering a conversational experience over common voice channels across platforms to resolve generic and personalized queries, execute transactions, and receive proactive action in critical medical situations.
HCLTech's Risk Evaluation and Mitigation Strategy (REMS)	N/A	It is a solution that uses a single modular system to enable the REMS program during the drug launch process. It is a scalable solution that meets HIPAA, 21CFR Part 11, and other industry compliance needs. It is built using the HCLTech Digital Experience (DX) platform.
Servitization	N/A	It is a solution framework that assists enterprises in transforming their product-based models into services-based models using a utility-driven approach. It is critical because customers appreciate the utility or service, that a product or gadget delivers rather than the product itself. The extra services provide new revenue opportunities. It helps to flatten the manufacturer's revenue curve by producing recurring revenue rather than simply selling a product.
PV case intelligence	N/A	It is a solution that automates adverse event intake through a variety of channels, including email, call transcripts, handwritten forms, and more. It accelerates case input and improves pharmacovigilance by ensuring that important facts from patient reports are efficiently collected throughout communication channels.
HCLTech's Base90	N/A	It is an accelerator that offers best practices for the life sciences industry's business requirements and operations. With extensive experience in the needs of the life sciences sector and pharmaceutical business processes, HCLTech extended configuration and solutions on top of SAP best practices to reduce project timelines and provide a faster return on investment for a S/4HANA implementation.
RegIntel	N/A	It is a tool that uses text analytics to monitor regulatory changes and their impact. It provides real-time information, analysis, and intelligence on regulations, guidelines, policies, and legislations across various product lines. The solution auto-aggregates and summarizes regulations using web crawlers, APIs, and RSS feeds, and delivers real-time alerts and comprehensive regulatory intelligence reports to clients.

HCLTech profile (page 5 of 7)

Proprietary solutions

[REPRESENTATIVE LIST] [NOT EXHAUSTIVE]

Proprietary solutions for life sciences digital services

Solution/Accelerator name	Value chain	Details
AI Force	N/A	It is a generative AI-powered platform that enhances the software development and operations life cycle.
AI Foundry	N/A	It is a comprehensive AI estate, responsible AI adoption, and industrialization of generative AI initiatives to emphasizes the right technology and architecture, use case prioritization, and value realization through adoption and change management.
Intelligent Data Ingestion (iDi)	N/A	It is an AI-led Intelligent Data Ingestion (iDi) solution, which is designed to streamline and optimize the process of ingesting data across various sources.
SKETCH	N/A	It is a tool for rapid data pipeline development and deployment framework to accelerate data availability and accessibility.

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Key events

[REPRESENTATIVE LIST] [NOT EXHAUSTIVE]

Key events – investment/partnership/M&A

Event name	Type of event	Details
Zeenea	Acquisition	Acquired Zeenea, a firm that provides an intelligent data discovery platform for a variety of metadata management applications such as search, exploration, data cataloging, lineage, governance, compliance, and enterprise data marketplace
Starschema	Acquisition	It acquired Starschema data engineering services, a data engineering services company. The strategic acquisition strengthened HCL's capacity in digital engineering driven by data engineering.
Quest Informatics	Acquisition	Acquired Quest Informatics, an aftermarket, Industry 4.0 and IoT company, to help expand HCLTech's Industry 4.0 offerings into the rapidly expanding aftermarket industry
Generative AI	Innovation	It invested in generative AI to expand its capabilities across the life sciences value chain. It launched projects such as the enterprise AI foundry to help simplify and scale AI usage. HCLTech also has strategic agreements with major technology companies such as Microsoft and Google Cloud to utilize AI technologies and offer industry-specific solutions.
Biopharma subverticals	Expansion	Expanded its biopharma subverticals, particularly in drug discovery and pre-clinical domains, by bringing in additional industry specialists, SMEs, and building Centers of Excellence (CoEs)
Connected Assets in Regulatory Environment (CARE)	Platform	It developed the CARE platform. Its built-in components and interoperability provide effective integration with existing hospital administration services/solutions. CARE-based solutions make use of security, confidentiality, and compliance standards to meet changing regulatory requirements.
Life Science and Healthcare Academy (LiSHA)	Learning	It created LiSHA to provide education to new resources being hired. The academy enhances an individual's knowledge through courses that cover domain knowledge, business processes, legislation, and other documentation methods.
5G lab	Innovation	It created a 5G lab for manufacturing and supply chain, from device design to deployment. 5G has several use cases across subdomains, which has a direct impact on batch performance and time-to-market.










HCLTech profile (page 7 of 7)

Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact

Vision and capability

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

Strengths

- HCLTech offers a comprehensive services portfolio spanning pharma, MedTech, consumer health, and animal health, with AI and gen AI-driven solutions, such as Gen AI Literature Summarization and Drug Repurposing AI, driving innovation and efficiency across the value chain
- HCLTech leverages domain-specific IP, including PLUG for cybersecurity, Platform Acceleration Suite (PAS) for development, and CARE Grind for clinical and device data, to accelerate GTM and compliance
- HCLTech leverages hyperscalers such as AWS, Azure, and GCP for cloud-led transformation and partners with life sciences technology providers such as Veeva and Medidata to drive co-innovation and GTM initiatives across clinical, regulatory, and commercial functions
- HCLTech has expanded its nearshore and onshore presence in Mexico, Brazil, and Poland, enhancing client proximity and regulatory support

Limitations

- While HCLTech has invested in GenAI talent, Veeva training, and the LISHA Life Sciences Academy, scaling expertise in AI/ML, cloud, and cybersecurity remains an area for enhancement
- HCLTech's presence remains heavily concentrated in North America, with relatively lower traction in high-growth regions such as the APAC and Europe, despite having a footprint in the UK, Ireland, and select European markets
- HCLTech can take an IP-led approach to enhance market traction and scalability by complementing its strong services-led model with innovative, domain-specific solutions tailored for life sciences enterprises

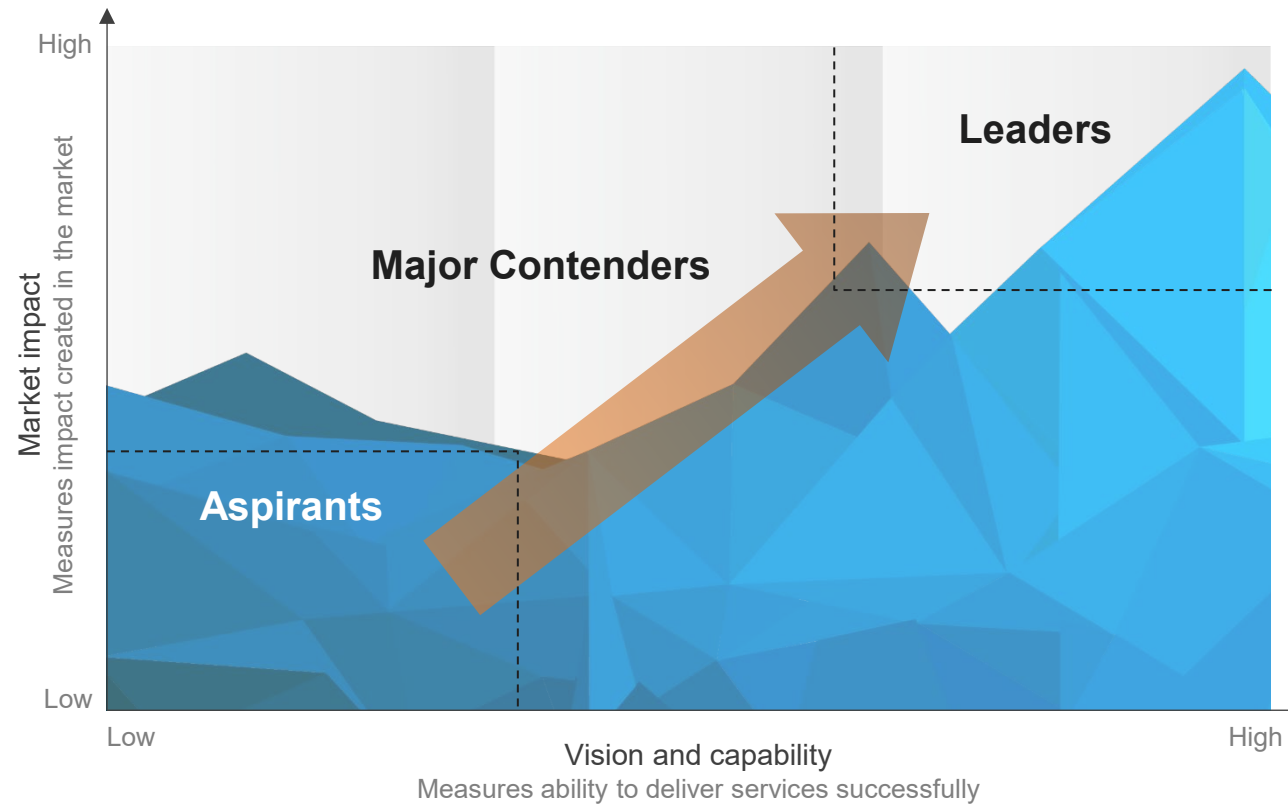
Appendix

PEAK Matrix® framework

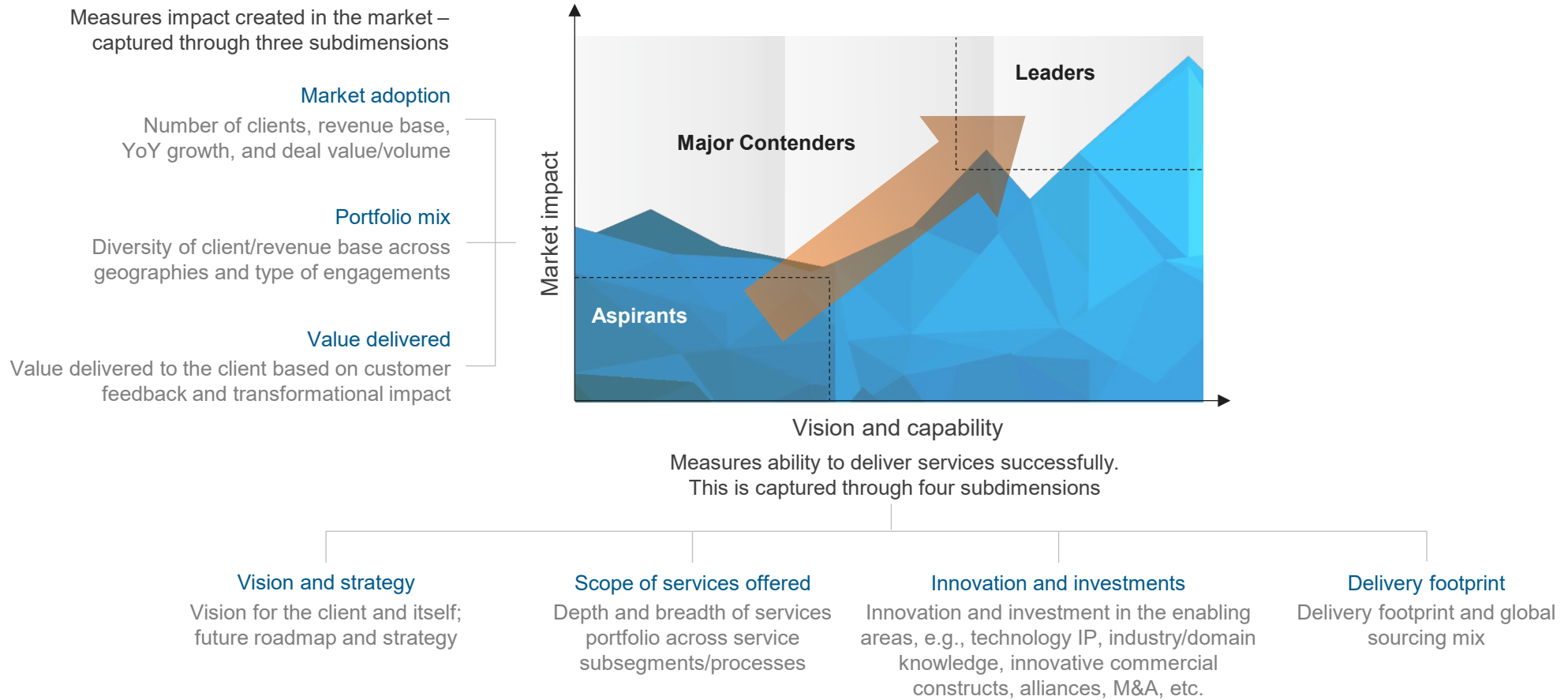
FAQs

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

Everest Group PEAK Matrix



Services PEAK Matrix® evaluation dimensions



FAQs

Q: Does the PEAK Matrix® assessment incorporate any subjective criteria?

A: Everest Group's PEAK Matrix assessment takes an unbiased and fact-based approach that leverages provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information. In addition, we validate/fine-tune these results based on our market experience, buyer interaction, and provider/vendor briefings.

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

A: 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.

Q: What other aspects of the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?

A: A PEAK Matrix positioning is only one aspect of Everest Group's overall assessment. In addition to assigning a Leader, Major Contender, or Aspirant label, Everest Group highlights the distinctive capabilities and unique attributes of all the providers assessed on the PEAK Matrix. The detailed metric-level assessment and associated commentary are helpful for buyers in selecting providers/vendors for their specific requirements. They also help providers/vendors demonstrate their strengths in specific areas.

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

A: Enterprise participants receive summary of key findings from the PEAK Matrix assessment

For providers

- The RFI process is a vital way to help us keep current on capabilities; it forms the basis for our database – without participation, it is difficult to effectively match capabilities to buyer inquiries
- In addition, it helps the provider/vendor organization gain brand visibility through being included in our research reports

Q: What is the process for a provider / technology vendor to leverage its PEAK Matrix positioning?

A: Providers/vendors can use their PEAK Matrix positioning or Star Performer rating in multiple ways including:

- Issue a press release declaring positioning; see our citation policies
- Purchase a customized PEAK Matrix profile for circulation with clients, prospects, etc. The package includes the profile as well as quotes from Everest Group analysts, which can be used in PR
- Use PEAK Matrix badges for 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 Everest Group; please contact your CD or contact us

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

A: PEAK Matrix assessments are designed to serve enterprises' current and future needs. 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 and to serve enterprises' future expectations.

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