



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

Focus on HCL Technologies  
July 2016



Everest Group recently released its report titled [“Life Sciences IT Infrastructure Services – Service Provider Landscape with PEAK Matrix™ Assessment 2016”](#). This report analyzes the changing dynamics of the global life sciences IT infrastructure services landscape and assesses service providers across several key dimensions.

As a part of this report, Everest Group analyzed 21 leading service providers on the Everest Group Performance | Experience | Ability | Knowledge (PEAK) Matrix, specific to global life sciences IT infrastructure 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 infrastructure service providers based on their absolute market success and delivery capability.

Based on the analysis, **HCL Technologies emerged as a Leader**. This document focuses on HCL Technologies’ life sciences IT infrastructure services experience and capabilities. It includes:

- HCL’s position on the life sciences IT infrastructure services PEAK Matrix
- Detailed life sciences IT infrastructure services profile of HCL

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.

# Life sciences IT infrastructure services service provider landscape: Background and scope of the research

## 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 21 IT 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 infrastructure market trends in life sciences
- The landscape of service providers for life sciences IT infrastructure services
- Assessment of the service providers on a number of capability-related dimensions
- Implications for life sciences IT infrastructure buyers and service providers

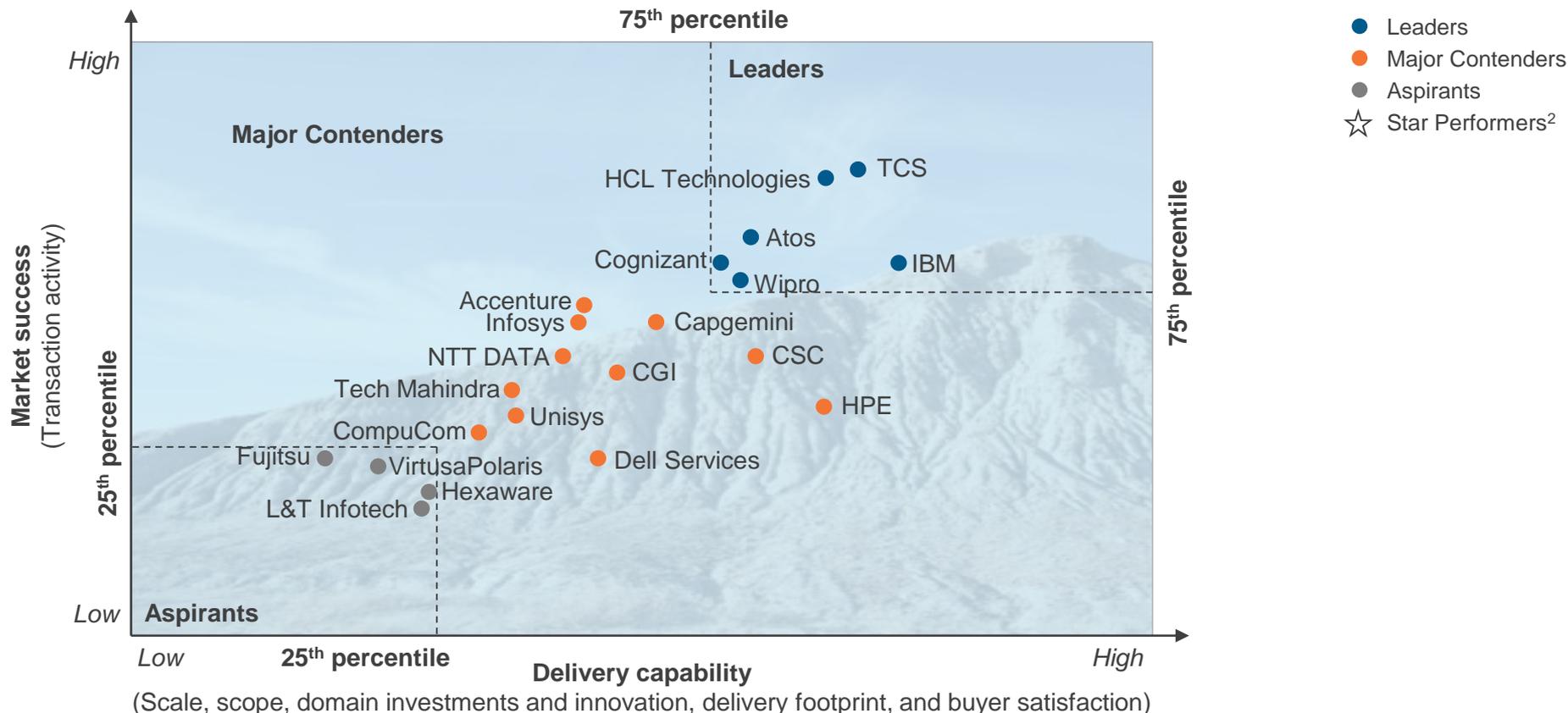
## Scope of this report

- **Industry:** Life sciences (pharmaceuticals, medical devices, biotechnology, and other life sciences<sup>1</sup>)
- **Services:** Multi-year and annuity-based infrastructure services
- **Geography:** Global
- **Sourcing model:** Third-party ITS transactions; excludes shared services or Global In-house Centers (GICs)

<sup>1</sup> Includes healthcare data & information services and medical products distribution

# HCL Technologies is positioned as a Leader on Everest Group's PEAK Matrix for life sciences IT infrastructure services

Everest Group Performance | Experience | Ability | Knowledge (PEAK) Matrix for life sciences IT infrastructure services<sup>1</sup>



<sup>1</sup> Assessment for Accenture, CompuCom, Fujitsu, Hexaware, IBM, Infosys, NTT DATA, 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 Accenture, CompuCom, Fujitsu, Hexaware, IBM, Infosys, NTT DATA, and Unisys, service provider public disclosures, and interaction with buyers

<sup>2</sup> Since this is the inaugural PEAK Matrix evaluation for life sciences IT infrastructure services, no Star Performers have been identified

Source: Everest Group (2016)

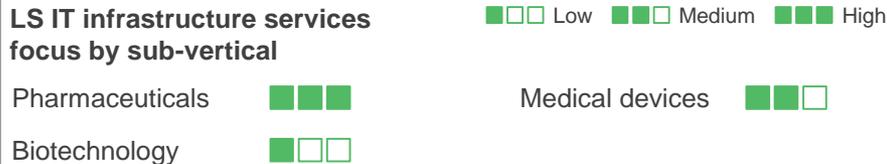
## Life sciences (LS) IT infrastructure overview

### Strengths

- A strong foothold in pharma and medical devices, with growing traction among biotechnology and contract research organizations
- Effective project/account management mechanisms with frequent touchpoints and robust communication with clients
- Strong focus on talent building/grooming via Centers of Excellence (CoEs) dedicated to healthcare and life sciences

**Scope and coverage:** Datacenter services, workplace services, network and telecommunication services, security, governance, risk & compliance (GRC), Service Integration & Management (SIAM), application operations services, and Remote Infrastructure Management (RIM)

### LS IT infrastructure services focus by sub-vertical



### LS IT infrastructure services focus by service scope



### LS IT infrastructure services focus by value chain



### Areas of improvement

- Focus on developing dedicated solutions for life sciences, in addition to a mere “healthcare wrapper” over its broad-based horizontal solutions
- Emphasize on identifying incremental/adjacent opportunities for HCL’s involvement in incumbent accounts
- Reinforce offerings in life sciences R&D and supply chain to emerge as an all rounder across the value-chain

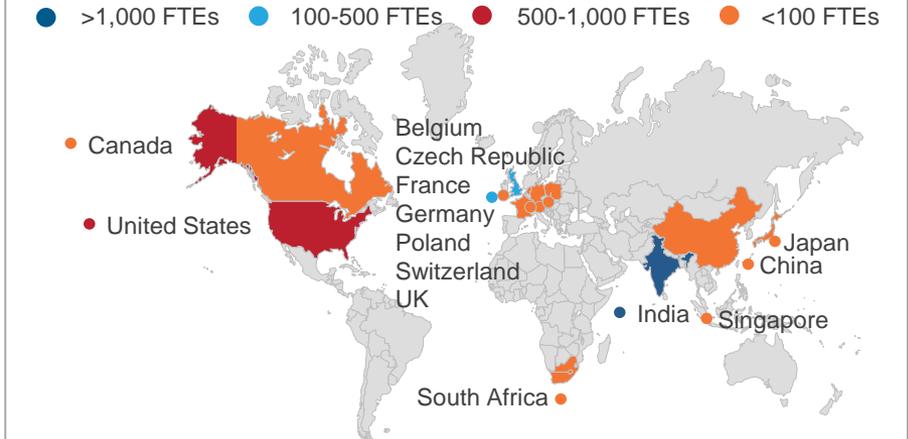
### LS IT infrastructure services revenue



### LS IT infrastructure services focus segments



### LS IT infrastructure services delivery map



Source: Everest Group (2016)

### Proprietary solutions (representative list)

| Solution                              | Details  |
|---------------------------------------|--|
| Datacenter transformation             | Help clients adopt best-in-class next-generation hybrid datacenter architectures with strong IT service management process automation and service orchestration at its core  |
| Agora                                 | HCL's cloud monetization & service delivery platform   |
| Workplace services                    | Provides consulting, professional, and operational services for transformation in BYOD, mobility, desktop delivery, collaboration, enterprise networks, end user experience management, and user support environments  |
| DryICE                                | Proprietary automation and orchestration platform. It leverages a reference architecture of automation and process transformation targeting simultaneous reduction of workload through automation and the creation of process agility. Comprises monitoring layer (MTaaS), machine learning components (on proven supercomputing systems), automation modules, orchestration components, knowledge management and a reporting layer – all tied together in a pragmatic ITSM based framework - the HCL Gold Blueprint |
| Network services                      | Spanning LAN/WAN management, WLAN management, unified communications, IPT, VoIP, IP contact center management, network operations center, network system integration services, network consulting services, network security services, and network implementation services.  |
| Management Tools as a Service (MTaaS) | Private cloud-based enterprise management platform for delivery of IT management tools   |
| Security                              | Enterprise-wide security services spanning Governance Risk & Compliance (GRC), security assurance & assessment, managed security, identity & access management, and transformation   |

### Key events (representative list)

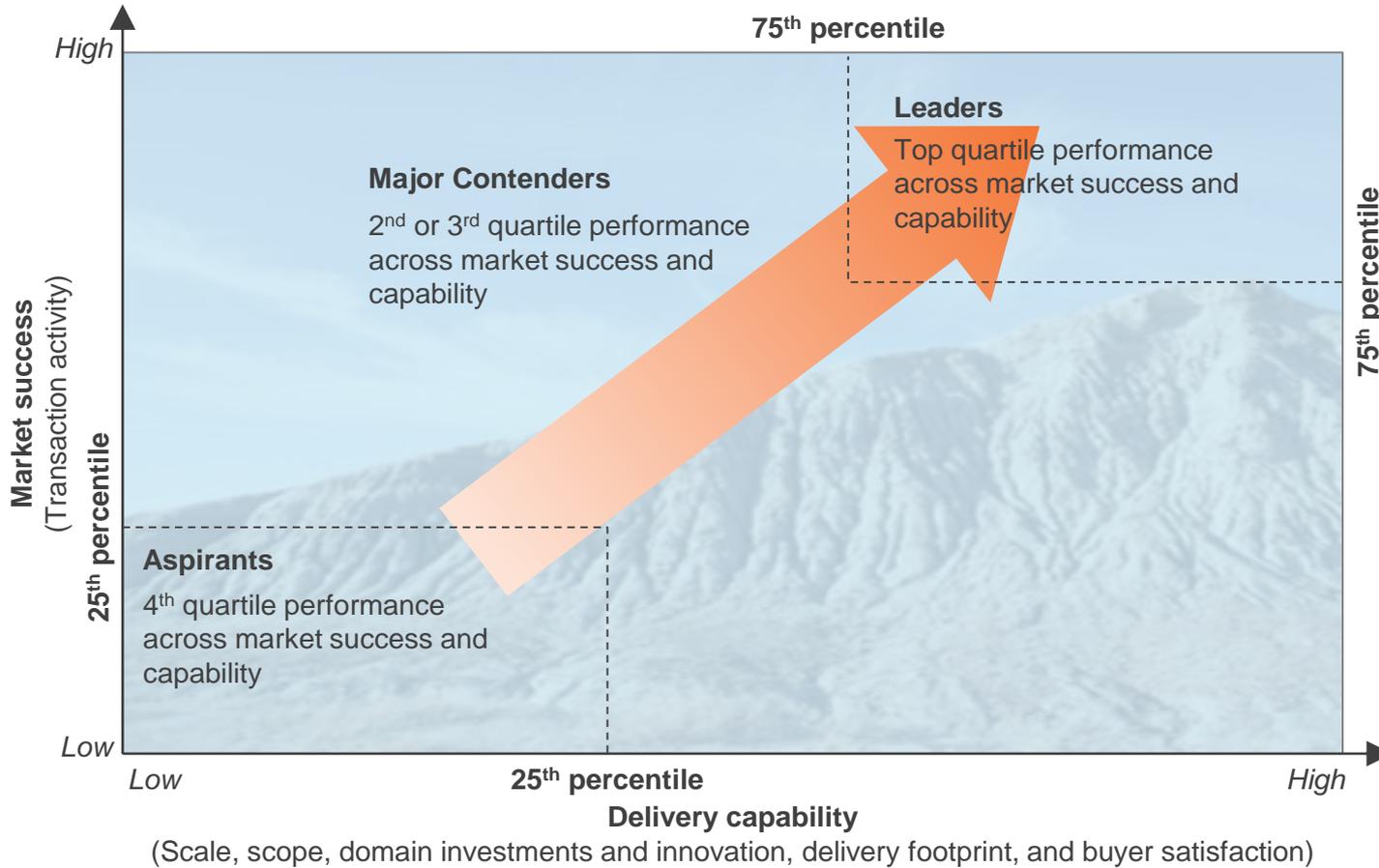
| Event name | Type of event | Details   |
|------------|---------------|---|
| (several)  | Alliances     | Partnerships with AWS, Microsoft, Labtronics, Trvium Health, Foresight, Pharmasol, ACT, Veeva, Optimal Strategix, Edetek, Perkin Elmer, Labware |

Source: Everest Group (2016)

# Appendix

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

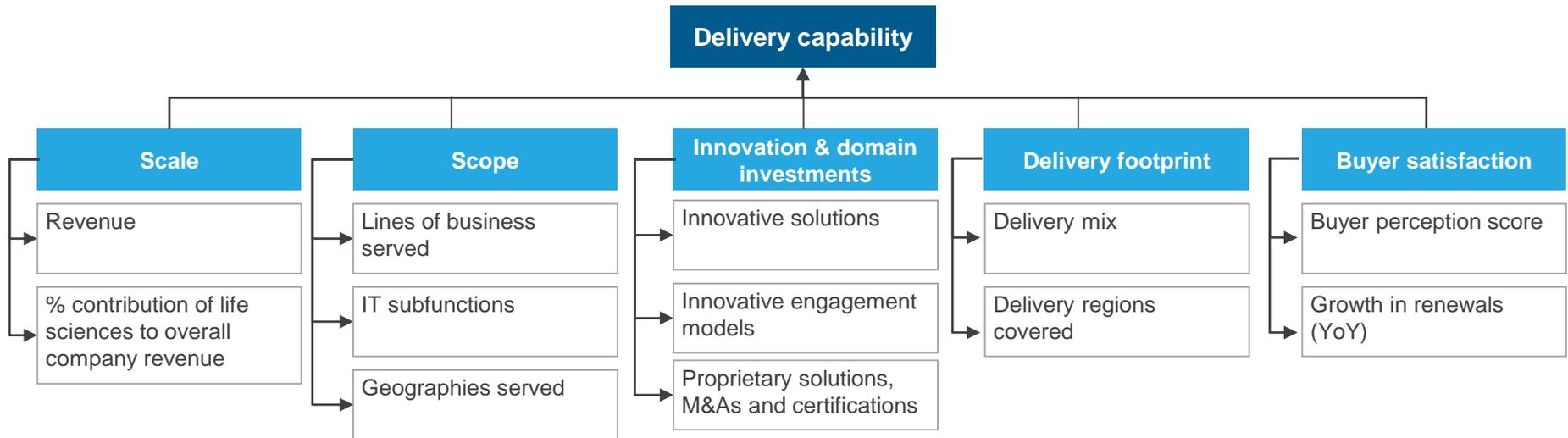
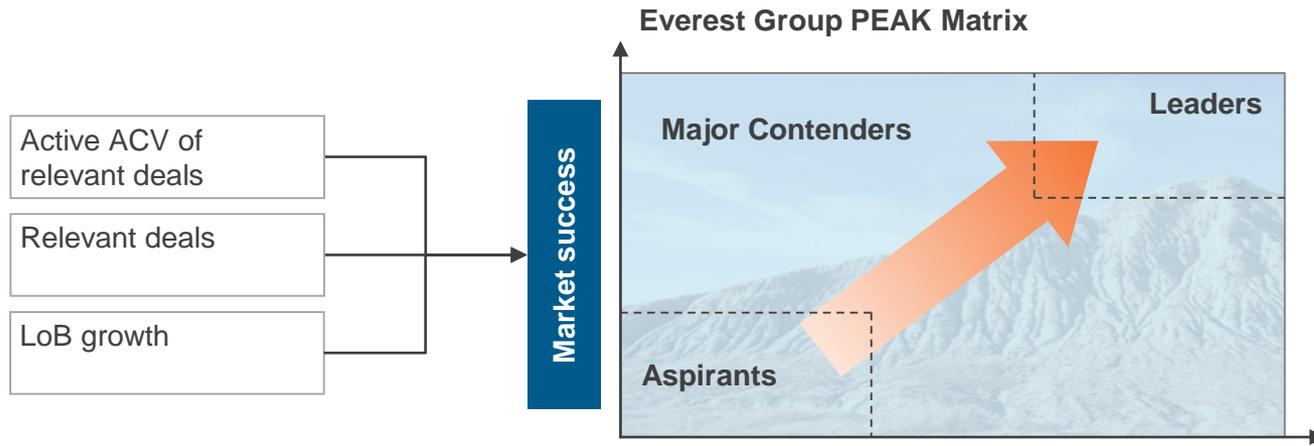
Everest Group Performance | Experience | Ability | Knowledge (PEAK) Matrix for life sciences IT infrastructure services



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



## **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

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### 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](http://www.everestgrp.com) and [research.everestgrp.com](http://research.everestgrp.com).

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