HFS TOP 10

HFS Top 10: Life Sciences service providers, 2021

An assessment of life sciences service providers by execution, innovation, OneOffice™ alignment, and client feedback

December 2021

RESEARCH AUTHORS:

Rohan Kulkarni, Practice Leader – Healthcare and Life Sciences Research
Mayank Madhur, Associate Practice Leader

Excerpt for EY

Life sciences service providers have developed sophisticated capabilities by leveraging emerging technologies to help deliver the next generation of therapies and devices to the market at unprecedented speeds while challenging and disrupting the status quo. This shape shift has the attributes of positively impacting the triple aim (cost, health outcomes and experiences) of care.

- Rohan Kulkarni, Practice Leader – Healthcare and Life Sciences Research

Life sciences has been redesigning itself in the post-COVID era, reshaping collaboration among organizations across the life sciences value chain, transforming clinical trials and the medical device industry to work for the triple aim.

- Mayank Madhur, Associate Practice Leader

Contents

1 Introduction and the HFS value chain

Introduction

- We are in the middle of a global pandemic, but the COVID-19 vaccine appears to be a primary factor in decreasing infection rates worldwide. The life sciences industry and its partner eco system, in a near miraculous effort, developed the vaccine less than 12 months. In that context, this Top 10 report reflects on how the industry and its ecosystem reacted.
- The *HFS 2021 Top 10 Life Sciences Service Providers* report examines service providers' role in the dynamic global life sciences industry. We assessed and rated the life sciences-specific service capabilities of 14 service providers across a defined series of innovation, execution, OneOffice™ alignment, and voice of the customer criteria.
- The assessment in the report is based on services for life sciences enterprises worldwide.
- This report also includes detailed profiles of each service provider, outlining their overall and subcategory rankings, provider facts, and detailed strength and development opportunities.
- Also, for the first time, we explore service providers' efforts in helping reduce or reverse climate change.
- The report specifically focuses on industry-specific capabilities for life sciences as defined in our life sciences value chain. It does not focus on horizontal IT or BPS services such as application management or finance and accounting outsourcing, which may be delivered to life sciences clients.

The HFS life sciences value chain

Pre-launch | Launch | Post-launch

Industry specific

Primary report focus

Pharmaceuticals, medical devices, biotechnology

Research and development

- Market and competitive intelligence
- Preclinical studies
- Patient recruitment and management
- Clinical trials
- Clinical data management
- Medical writing and publishing
- Biostatistics and statistical programming

Supply chain

- Order management
- Inventory management
- Manufacturing management
- Distribution planning, logistics, and analysis
- Defect handling
- Reverse logistics
- Procurement and vendor management

Sales and marketing

- Inside sales
- Sales operations and analytics
- Marketing operations and analytics
- Market research
- Patient access and medication services

Pharmacovigilance

- Data collection and case processing
- Medical review
- Medical writing and reporting
- Remote monitoring and safety surveillance
- Signal generation and detection
- Risk management

Regulatory

- Dossier writing, compilation, and submission
- Pre- and post-submission services
- Drug tracking, incidence reporting, recall and compliance management
- Product lifecycle management
- Artwork, label, and pack management

Enabling technologies

RPA I Artificial intelligence I Smart analytics I Blockchain I IoT I Cloud I Mobility I Social media I Augmented and virtual reality I 3D printing

Horizontal

Horizontal IT processes

Planning, design, and implementation I Application development and maintenance I Infrastructure management I Security

Horizontal business processes

Customer engagement I Human resources I Procurement I Finance and accounting I Payroll I Legal and compliance

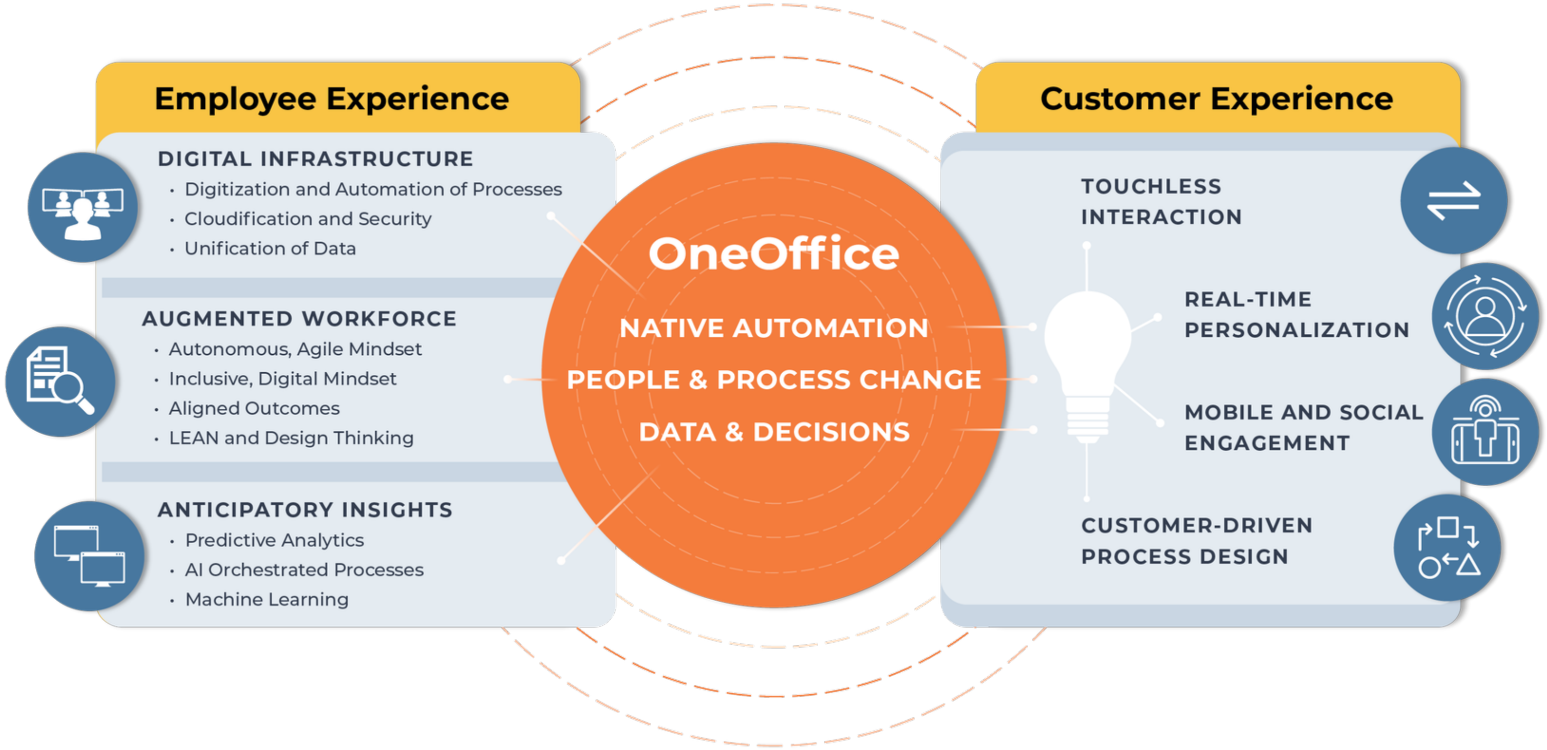
The HFS life sciences value chain defined

- HFS developed the industry value chain concept to graphically depict our understanding of the processes and functions that specific industries engage in to operate their businesses.

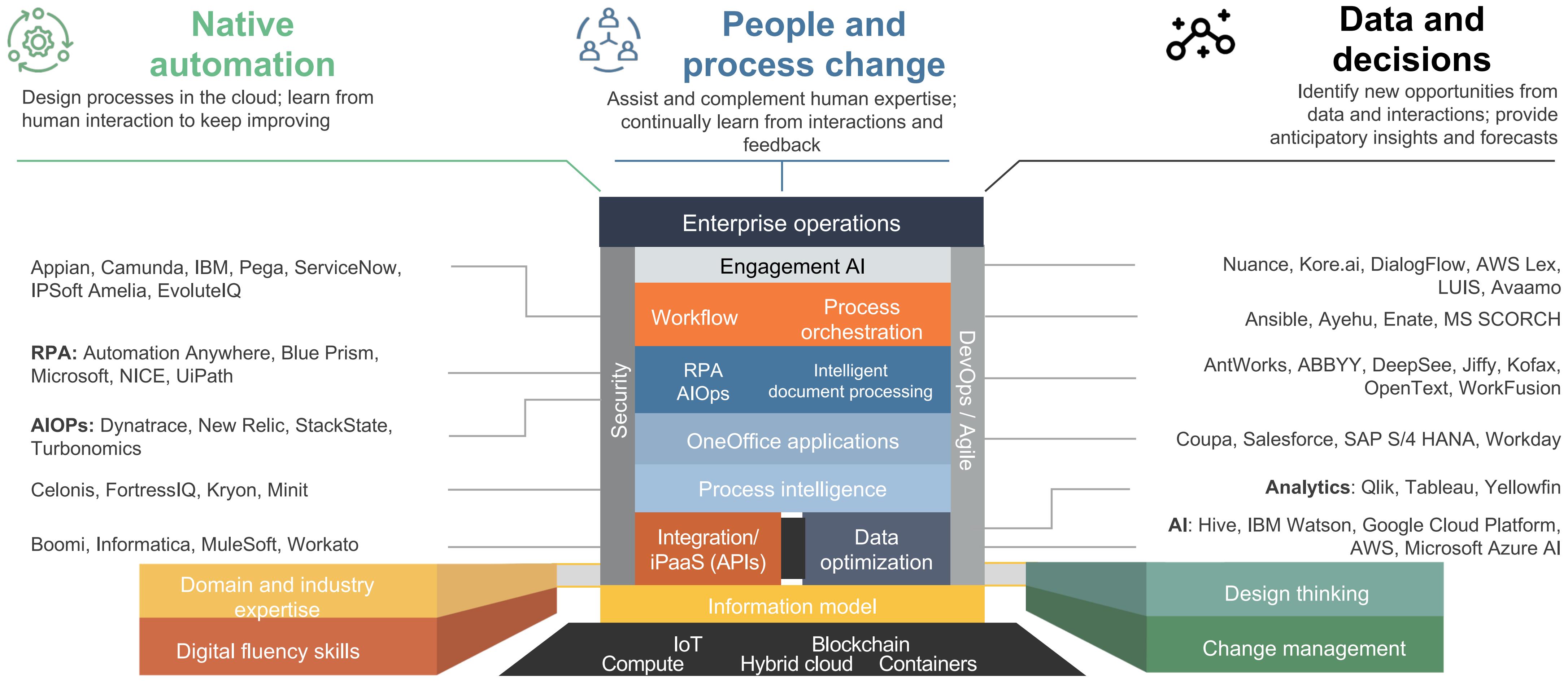
- HFS' industry value chain for life science operations provides a comprehensive overview of services for the healthcare industry. **Industry-specific processes** include the following specific value chain functions:
  - **Research and development:** Processes related to new drug development and formulation including pre-clinical studies, clinical trials, and market and competitive intelligence;
  - **Supply chain:** Services that support the flow and management of inventory from inception to consumption;
  - **Pharmacovigilance:** Processes supporting the detection, assessment, understanding, and prevention of adverse effects or any other drug-related problem after they have been licensed for use;
  - **Sales and marketing:** Services that enable sales and marketing operations and related analytics;
  - **Regulatory:** Services enabling compliance with various regulatory requirements, both pre-submission and post-submission.

The HFS OneOffice™—digital transformation in action

The HFS OneOffice™ is our vision for actionable digital transformation. At its heart is the core concept that emerging technologies combined with people, process, and data innovation can break down the silos that limit our success, dissolving barriers between the front and back office to create the only office that matters—OneOffice. It represents a mindset shift to collaborative cross-functional enterprise operations powered by an integrated stack of emerging tech that complements your core, natively automates your processes, enables your employees and customers, and powers your decisions—breaking down your legacy silos in the process.



The OneOffice Emerging Tech Platform—powering the journey to the OneOffice



Source: HFS Research, 2021, examples are representative

2 Research and methodology

Service providers covered in this report

accenture
Atos
CONDUENT
Capgemini
Cognizant

EY
genpact
HCL
Infosys
Navigate your next
LTI
Let's Solve

NTT DATA
Trusted Global Innovator
tcs TATA CONSULTANCY SERVICES
Tech Mahindra
wipro

Sources of data

This Top 10 research report relies on myriad data sources to support our methodology and help HFS obtain a well-rounded perspective on the service capabilities of the participating organizations covered in our study. Sources are as follows:

RFIs and briefings

- **RFIs:** We ask each participating organization to complete a detailed RFI.
- **Vendor briefings:** HFS conducts briefings with senior executives from each organization.

Reference checks

- HFS conducts reference checks with **active clients** of the study participants via survey and phone-based interviews.

HFS vendor ratings

- Each year, HFS fields multiple demand-side surveys in which we include detailed vendor rating questions. For this study, we leverage the HFS Pulse data featuring **400+ vendor ratings from Global 2,000 enterprises**.

Other data sources

- **Public information** such as press releases, web sites, etc.
- **Additional sources** such as ongoing interactions, briefings, virtual events, etc., with in-scope vendors and their clients and partners.

Our assessment approach for this study

The study evaluates the capabilities of providers across the life sciences value chain based on execution, innovation, voice of the customer (VOC), and a new criteria for 2021, alignment with the HFS OneOffice model—our vision for digital transformation. Details include

25%

Execution

- **Breadth and depth:** Includes life sciences revenue, client portfolio, global delivery footprint, and delivery spread
- **Scale of life sciences business:** Industry-specific resources, industry talent cultivation, geographical coverage, subsectors covered, number of clients, revenue and revenue contribution
- **Growth of life sciences business:** Year-on-year revenue growth, client growth—new logo and organic, resource growth, offering expansion
- **Outcome realized:** Contribution to the triple aim (cost of care, health outcomes, and experience of care)

25%

Innovation

- **Strategy and vision:** Including an integrated digital and IoT vision and credibility of strategy, strong understanding of the trends, and refinement of capabilities to address the challenges, go-to-market strategy, competition strategy
- **Life sciences technology innovation:** In-house tools, patents, platforms, frameworks, lab infrastructure, process integration, and R&D outcomes
- **Co-innovation and collaboration:** Co-innovation with clients, creative commercial models including pricing, and innovative engagement models aligning with market trends
- **Outcome realized:** Contribution to the triple aim (cost of care, health outcomes, and experience of care)

25%

OneOffice alignment

- **OneOffice scope:** End-to-end offering that connects the front, middle, and back offices
- **OneOffice skills:** Cultivation of OneOffice skills such as digital fluency and problem solving, internally and with clients
- **OneOffice competencies:** Formalized approaches to data and change management
- **OneOffice technology platform:** Enabling capabilities that support "straight-to-digital," anything related to deployment of intelligent automation, IT-OT convergence, 5G, and other emerging technologies that weave into the OneOffice concept

25%

Voice of the customer

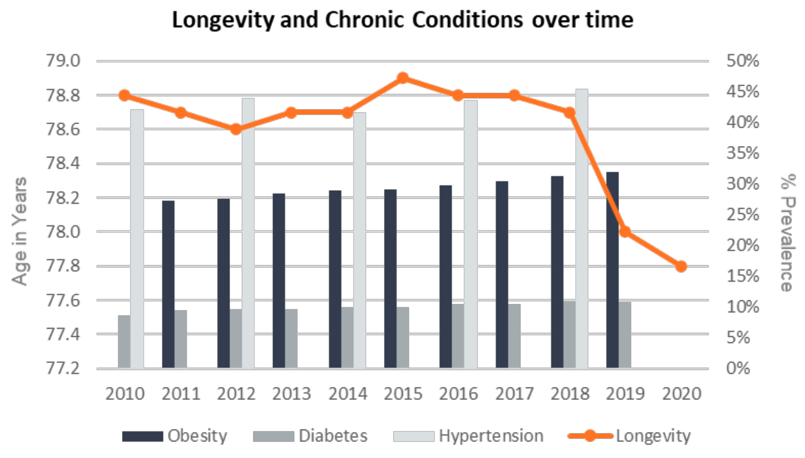
- **References and interviews:** Sourced from study participants
- **Referenceability:** Provision of references and responsiveness
- **HFS survey data:** Feedback from non-reference clients sourced from HFS' network

3 Market dynamics

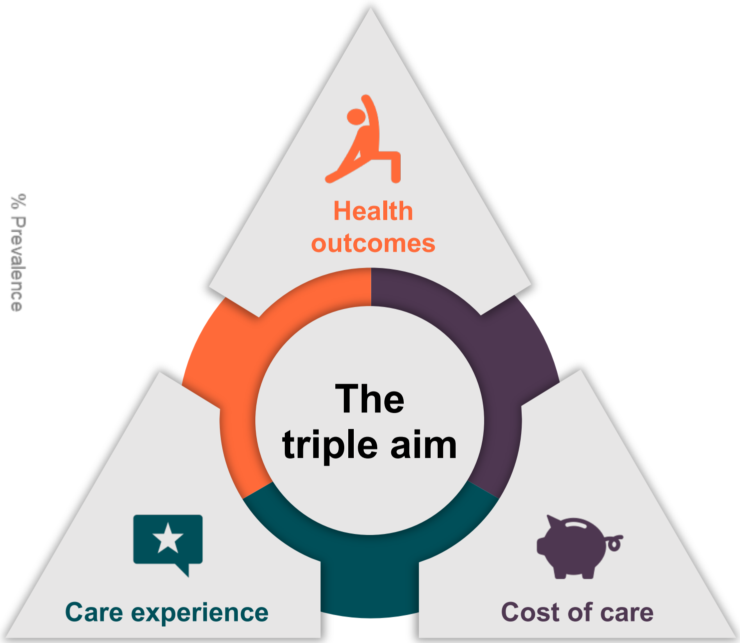
Executive summary

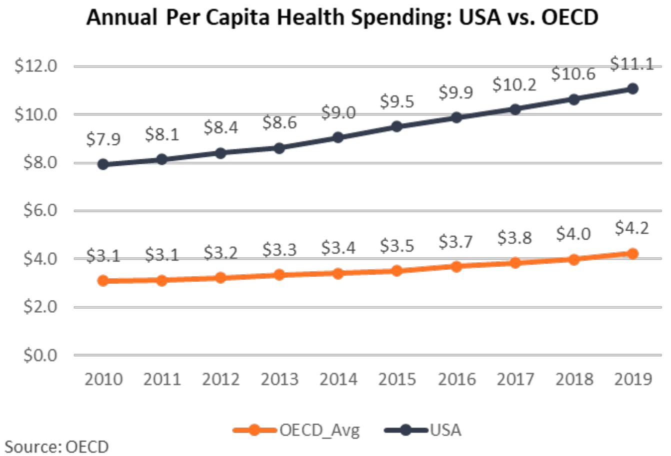
Triple aim	The triple aim of cost, health outcomes, and experience of care continues to be underachieved. Costs are growing at two to three times the inflation rate, and the prevalence of chronic conditions continues to increase while life expectancy is declining, and overall healthcare experience is nothing to write home about.
Emerging tech	Life sciences providers have been adopting emerging technologies like AI and smart analytics rapidly and leveraging them for real-world outcomes such as developing COVID-19 vaccines; the future of therapies is encouraging with increasing decentralized clinical trials leading to faster molecule-to-market speed.
Service providers	Multiple service providers rate their life sciences businesses among their top three focus markets. The investments made in new solutions and services, talent, and innovation is exciting; some could become CROs (Clinical Research Organization) or pharma’s if they choose to.
Sustainability	Most service providers are investing in sustainability with ambitious goals to achieve net-zero emissions in the next decade or sooner. However, it is unclear if this is just the current priority or if it is here to stay with changing behaviors and investments to support sustainability goals.

All the attributes of the triple aim of care are heading in the wrong direction

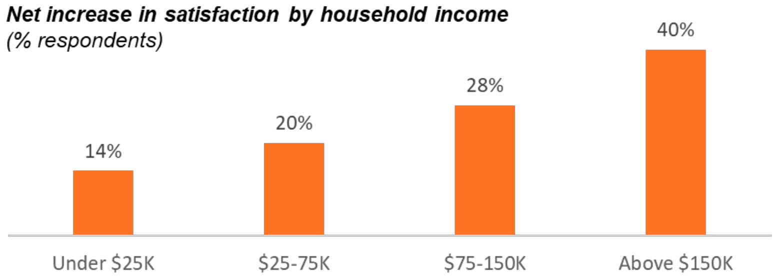


Source: CDC





Source: OECD

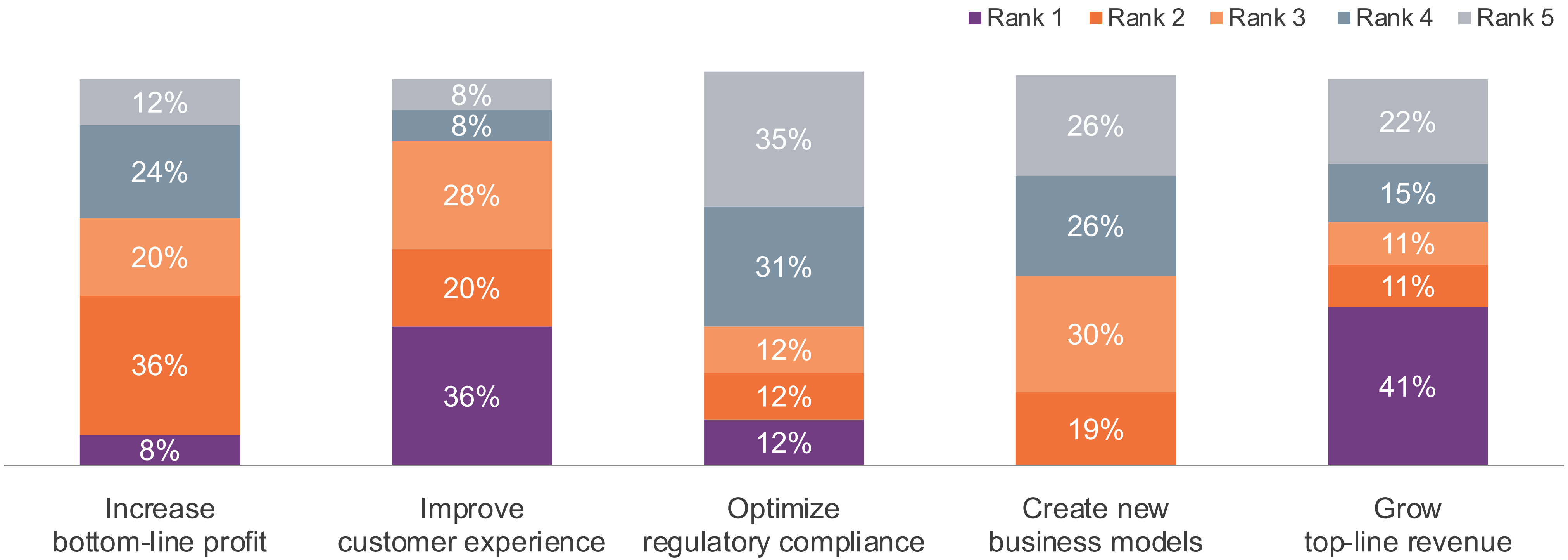


Sample: 2,411 US healthcare consumers
Source: HFS Research, 2021

Yet, enterprise priorities are aligned more to corporate financial goals vs. improving the state of health and healthcare

Please rank the following statements about your organization's objectives for business operations transformation over the next three years

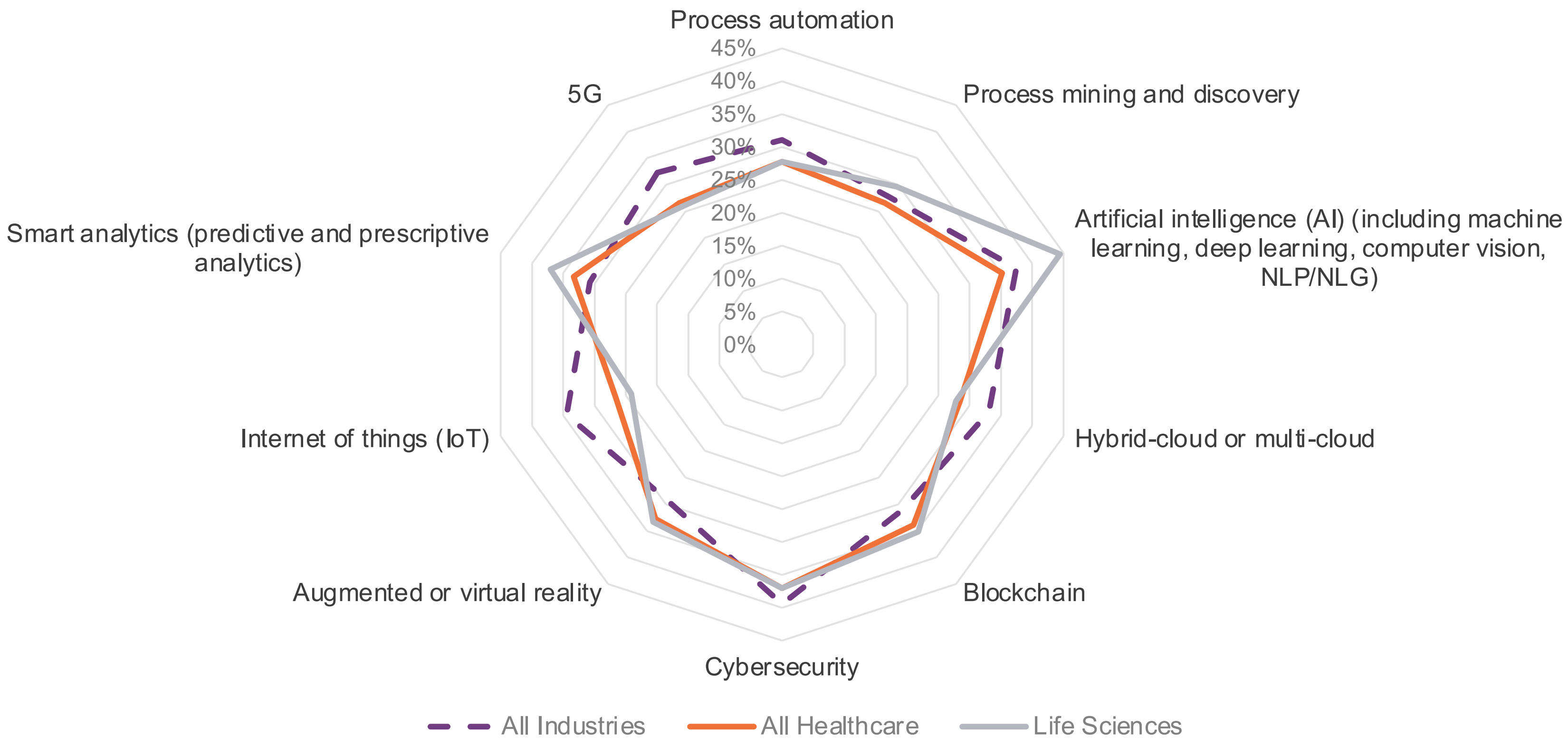
Percentage of respondents



Sample: 28 client references

Still life sciences enterprises lead the adoption of emerging tech that could translate in to improving the triple aim attributes

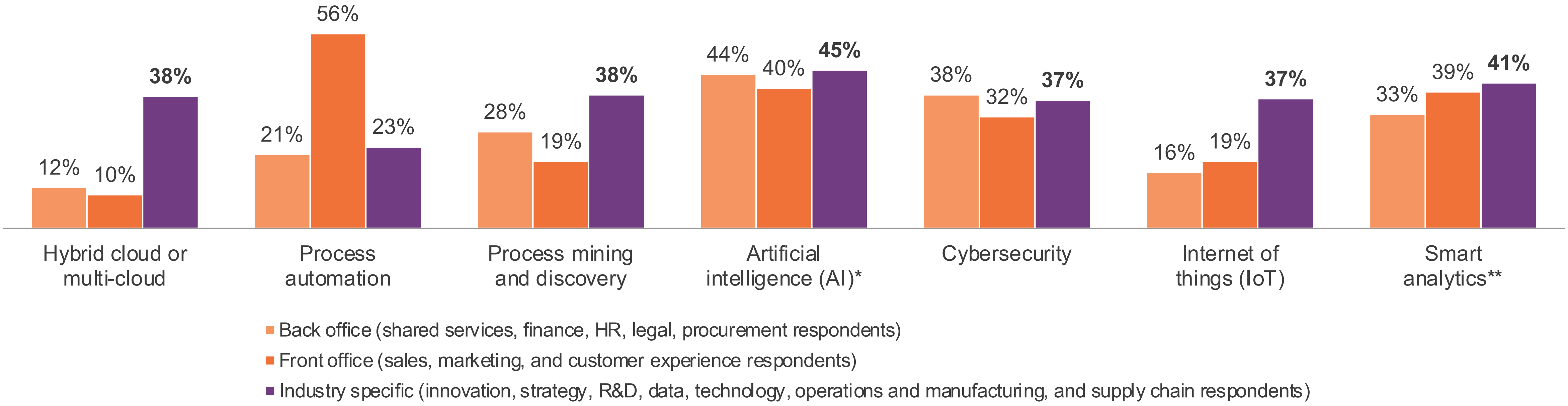
What is the stage of overall adoption of emerging technologies in your company?
Percentage of healthcare enterprises implemented at scale



Sample: 800 respondents from Global 2000 enterprises
Source: HFS OneOffice Pulse Study, H1 2021

The adoption patterns validate the focus on industry specific solutions vs. corporate functions

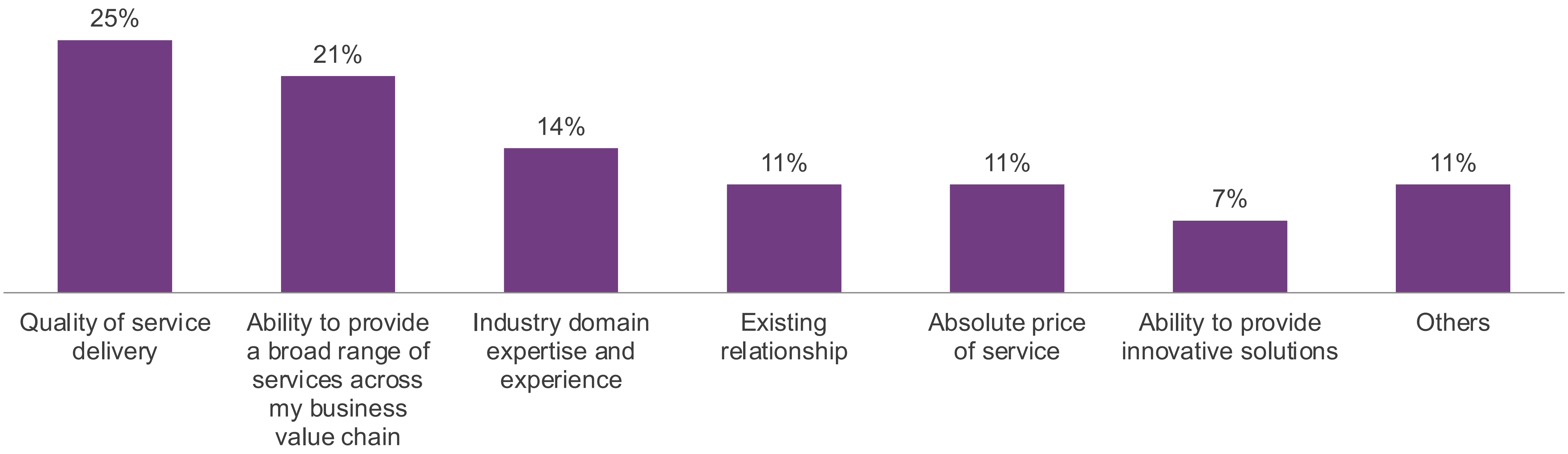
Investment changes for these emerging technologies over the next 12 to 18 months
Percentage of healthcare respondents reporting "significant investment increase"



* Includes machine learning, deep learning, computer vision, NLP/NLG
** Includes predictive and prescriptive analytics
Sample: 800 respondents from Global 2000 enterprises
Source: HFS OneOffice Pulse Study, H1 2021

Provider selection is driven by quality-of-service delivery and ability to provide a broad range of services across the value chain

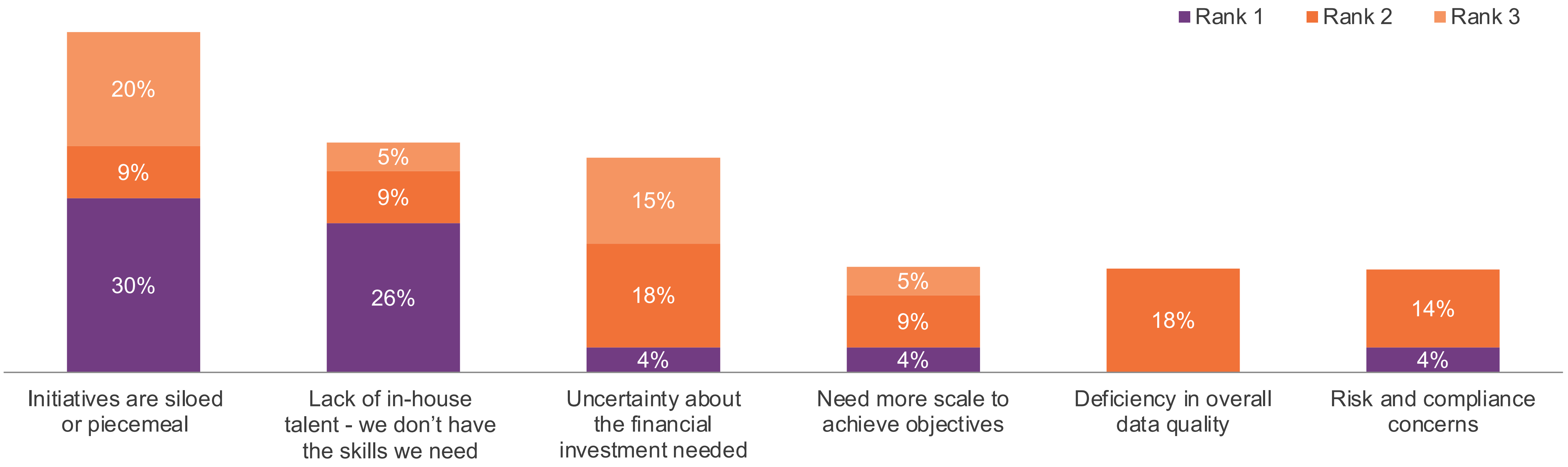
Which of the following options was the single most important when selecting this provider?
Percentage of respondents



Sample: 28 client references

Siloed initiatives and lack of in-house talent hold enterprises back from achieving digital transformation objectives

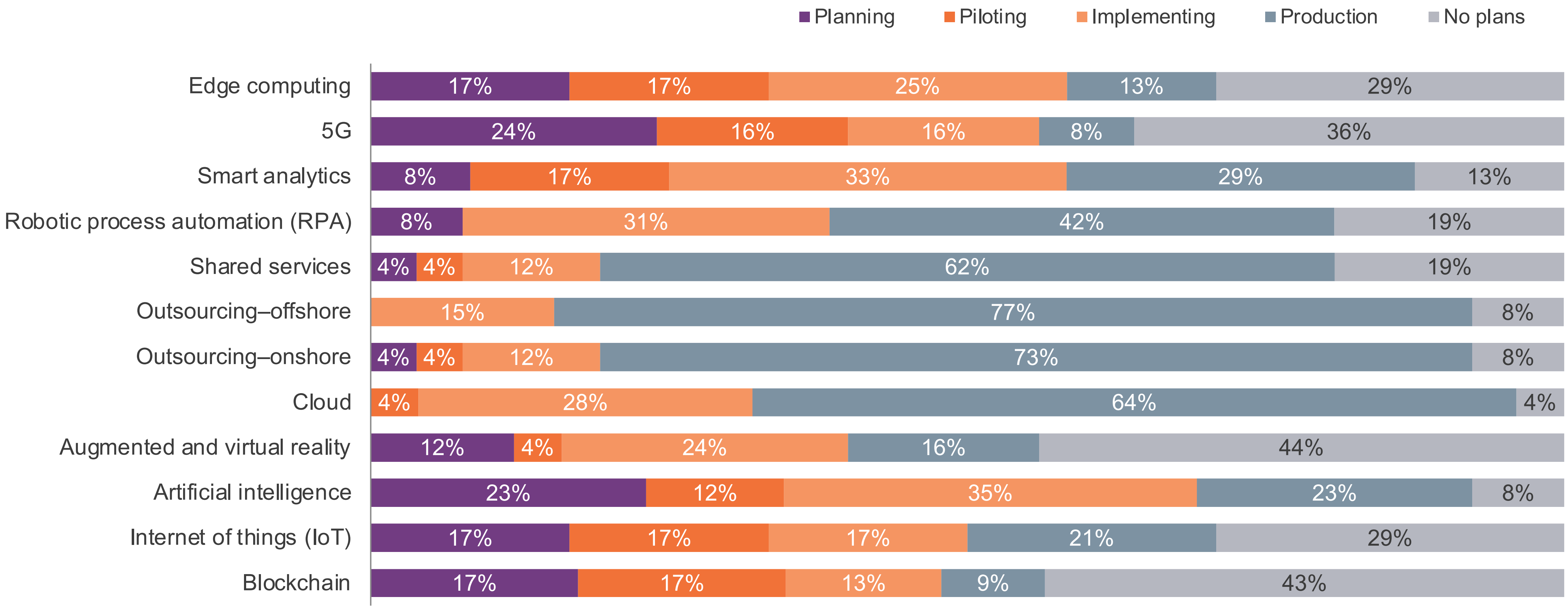
What are the top three inhibitors holding you back from achieving your digital transformation objectives?
Percentage of respondents



Sample: 28 client references

So outsourcing, cloud, and shared services act as current value creation levers given the intrinsic enterprise challenges

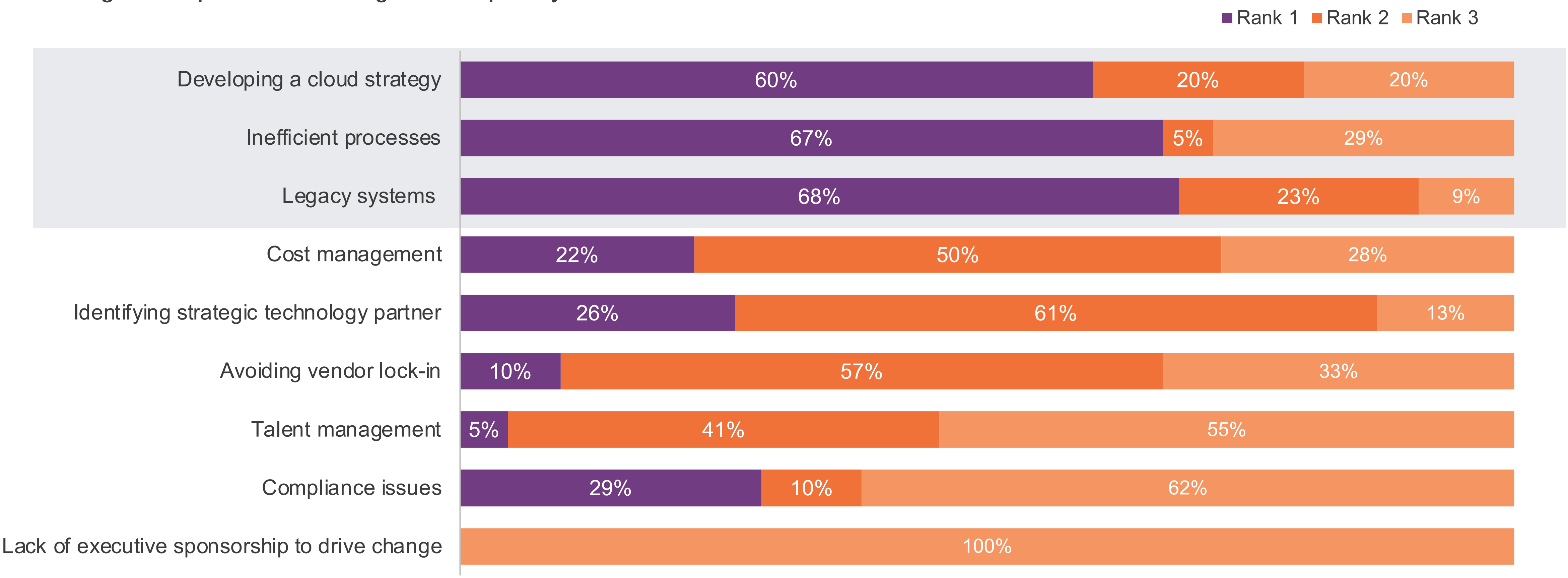
Please characterize your organization's current use of the following value creation levers to achieve the business outcomes
Percentage of respondents



Sample: 28 client references

Life sciences enterprises appear to be struggling with cloud strategy, held back by legacy systems and inefficient processes

What are the challenges for your organization in the context of adopting cloud?
Percentage of respondents ranking order of priority

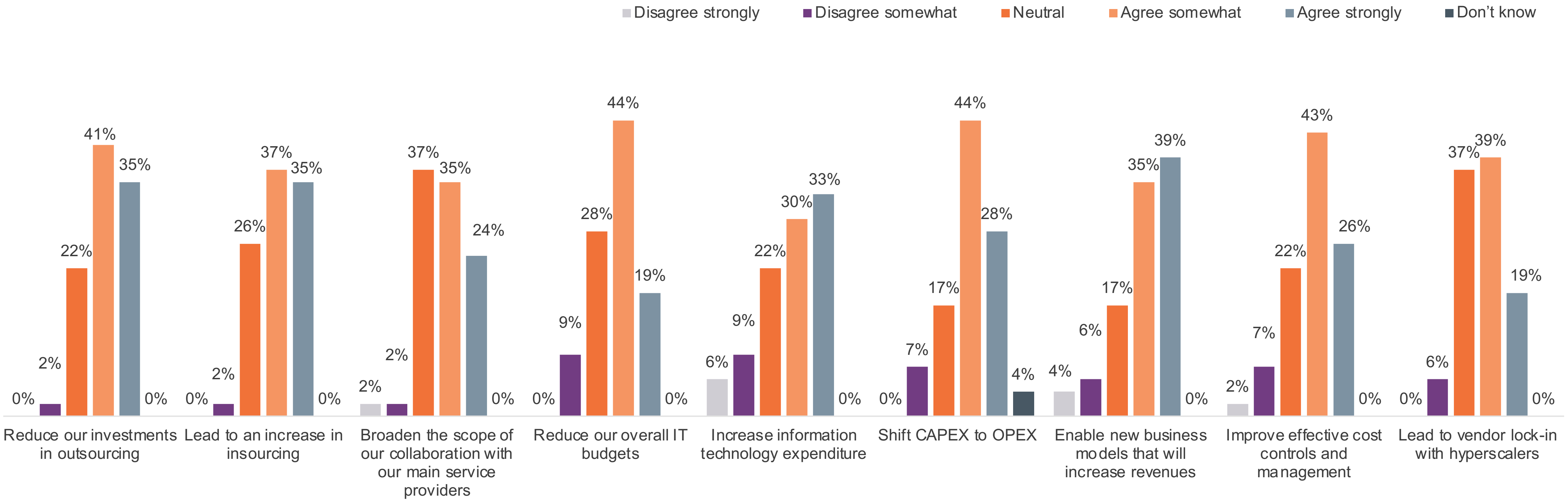


Sample: 800 respondents from Global 2000 enterprises
Source: HFS OneOffice Pulse Study, H1 2021

The lack of progress with cloud has negative impacts across new revenues, OPEX, and innovation

On the scale of strongly agree to strongly disagree how would you rate your cloud strategy impacting other sourcing and investment decisions?

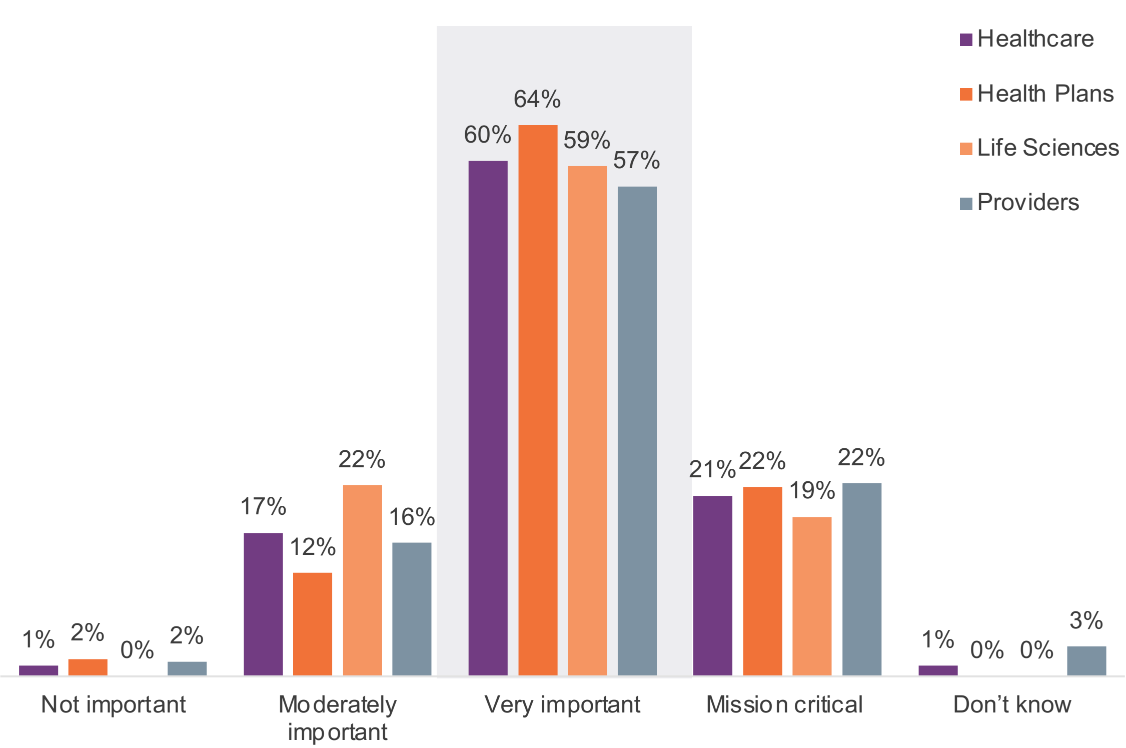
Percentage of respondents



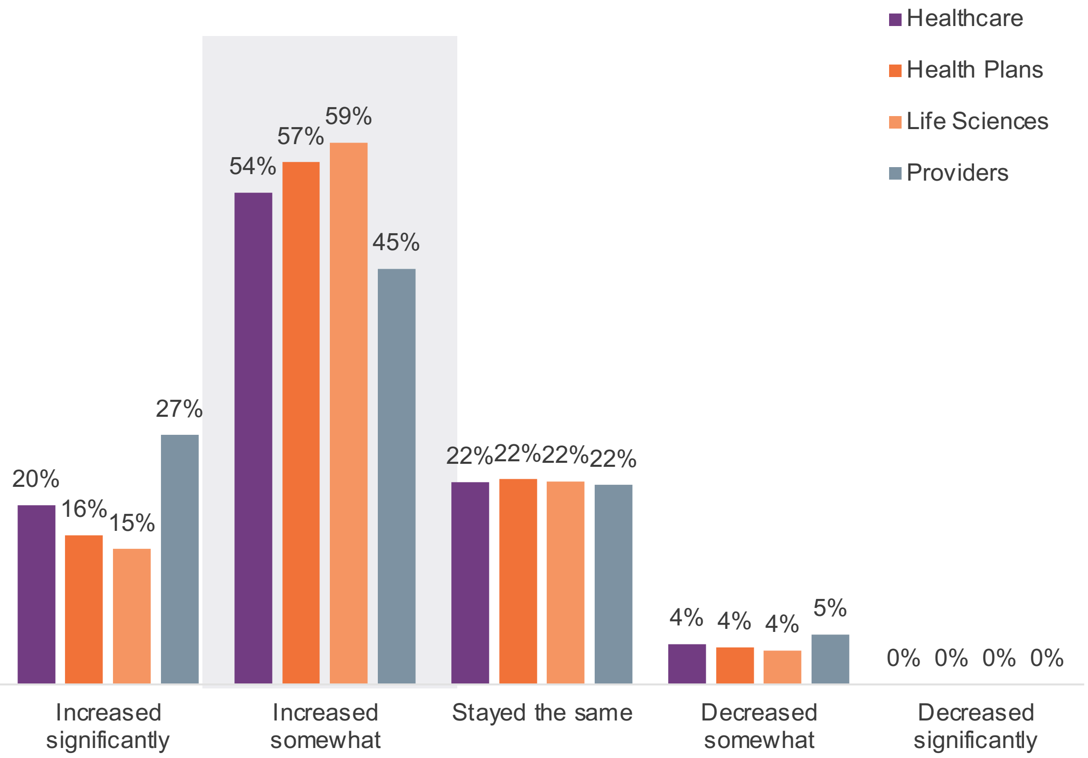
Sample: 800 respondents from Global 2000 enterprises
Source: HFS OneOffice Pulse Study, H1 2021

However, the OneOffice mindset is overwhelmingly important to enterprises' operations and strategies for life sciences

How important is it to drive a OneOffice mindset (connecting the front, middle, and back offices to create a touchless and frictionless digital experience) for your company's overall operation and strategy?
Percentage of healthcare respondents ranking order of priority



Has the importance of a OneOffice mindset increased or decreased since Q2 2020 (after the pandemic shock)?
Percentage of respondents ranking order of priority



Sample: 800 respondents from Global 2000 enterprises
Source: HFS OneOffice Pulse Study, H1 2021

Life sciences services | Life science services engagement landscape

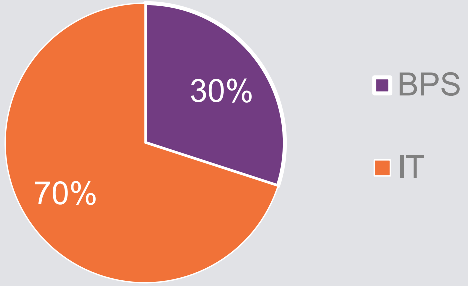
FTE landscape

Maximum	43,000
Average	13,500
Minimum	700

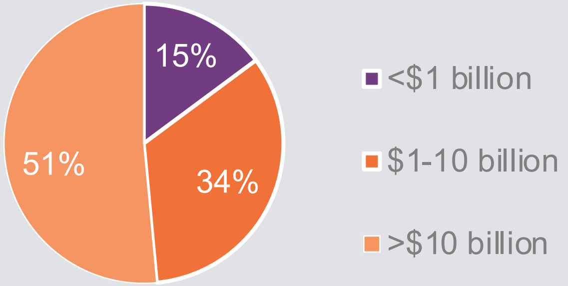
Revenue landscape

Maximum	$2,250 million
Average	$1,021 million
Minimum	$52 million

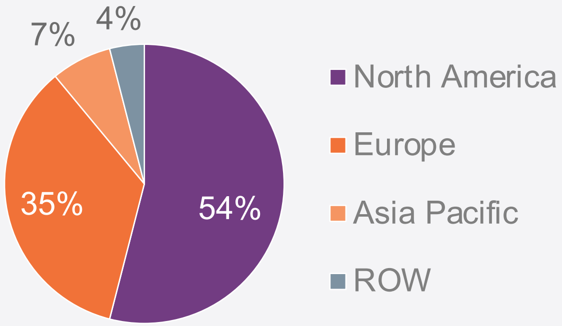
Average IT/BPS split



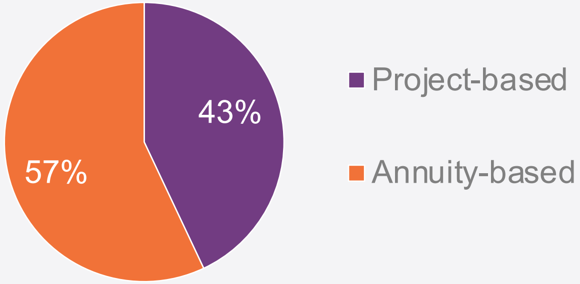
Average client by size split



Average engagement geo split



Project-based versus annuity based



Inclusion criteria for participation:
- Annual revenue of at least $100 million and or 10% contribution to overall revenue generated through the life sciences value chain

OR• Ability to serve two or more value chain categories, e.g., sales and pharmacovigilance

OR• Ranked in the HFS 2019 Top 10 Life Sciences Service Providers report

4 Top 10 results: Life Sciences service providers 2021

Life sciences service providers | A summary of the providers assessed in this report

Providers (alphabetical order)	**HFS point of view**
Accenture	Innovative firm operating at the intersection of human ingenuity, technology, and scientific advancement to change life sciences' future
Atos	Firm trying to solve customer problems with its innovative approach
Capgemini	Research and innovation at the heart of an expanding solution portfolio redefining value
Cognizant	A firm with vision for end-to-end services and solutions with its platform and ecosystem approach
Conduent	Consulting and platforms driving a life sciences rejuvenation on the back of strong client relationships
EY	A client-centric and practical-outcomes-focused firm helping to move life sciences to the next level
Genpact	AI central to delivering transformation to its life sciences clients
HCL	Digitalizing the core of life sciences with the help of its engineering DNA
Infosys	Determined to deliver next-gen life sciences solutions while expanding market segments
LTI	A niche service provider disrupting the life sciences sector with its new offerings
NTT DATA	A long tradition of innovation and research lends itself easily to value creation for life sciences
TCS	Deep life sciences expertise positions it to be a strategic partner across the value chain
Tech Mahindra	Leveraging cross-industry knowledge to strengthen and expand its life sciences offering
Wipro	A provider of deployment-ready solutions across the life sciences value chain

Notable performances from the 2021 Top 10 life sciences service providers

HFS Winners Circle Top five providers overall across execution, innovation, OneOffice alignment, and voice of the customer criteria				
#1	#2	#3	#4	#5
EY	accenture	wipro	tcs TATA CONSULTANCY SERVICES	Cognizant

Execution powerhouses Top three providers on execution criteria			Innovation champions Top three providers on innovation criteria			OneOffice alignment Top three providers aligned to OneOffice			Outstanding voice of the customer Top three providers on voice of the customer criteria		
#1	#2	#3	#1	#2	#3	#1	#2	#3	#1	#2	#3
EY	wipro	tcs TATA CONSULTANCY SERVICES	Cognizant	EY	Infosys® Navigate your next	EY	accenture	tcs TATA CONSULTANCY SERVICES	EY	Atos	HCL

Other notable performances

- Conduent ranked #6 in the voice of the customer and #7 in execution outcomes realized.
- LTI ranked #5 in the growth of life sciences business, #6 in innovation outcomes realized, and #7 in life sciences technology innovation.
- Tech Mahindra ranked #4 in innovation outcomes realized.

HFS 2021 Top 10 life sciences service providers ranking

Rank	Overall HFS Top 10 position	Execution					Innovation					OneOffice alignment	Voice of the customer
		Breadth and depth	Scale of life sciences business	Growth of life sciences business	Outcomes realized	Overall execution	Strategy and vision	Life sciences technology innovation	Co-innovation and collaboration	Outcomes realized	Overall innovation		
#1	EY	EY	EY	Capgemini	EY	EY	accenture	TCS	EY	EY	Cognizant	EY	EY
#2	accenture	Infosys	TCS	EY	Cognizant	wipro	Infosys	Cognizant	HCL	wipro	EY	accenture	Atos
#3	wipro	TCS	Cognizant	wipro	wipro	TCS	Cognizant	genpact	TCS	TCS	Infosys	TCS	HCL
#4	TCS	wipro	accenture	accenture	accenture	Capgemini	NTT Data	accenture	Infosys	Tech Mahindra	TCS	HCL	accenture
#5	Cognizant	Cognizant	Capgemini	LTI	Infosys	accenture	EY	Atos	Atos	Cognizant	wipro	Cognizant	wipro
#6	HCL	HCL	wipro	Infosys	LTI	Cognizant	genpact	EY	genpact	LTI	Atos	wipro	Conduent
#7	Infosys	accenture	HCL	TCS	Conduent	Infosys	Atos	LTI	wipro	Infosys	genpact	genpact	Tech Mahindra
#8	NTT Data	Capgemini	Infosys	HCL	NTT Data	HCL	wipro	wipro	Cognizant	Atos	NTT Data	Infosys	NTT Data
#9	Atos	NTT Data	Tech Mahindra	genpact	genpact	LTI	HCL	NTT Data	LTI	genpact	LTI	NTT Data	Infosys
#10	genpact	Tech Mahindra	NTT Data	NTT Data	TCS	genpact	LTI	Capgemini	accenture	NTT Data	accenture	Tech Mahindra	Cognizant

Note: Rankings reflect aggregate scores, but rankings are not the scores.

5 EY profile

How to read our service provider summary statements

Logo

Dimension	Rank
HFS Top 10 position	#
Ability to execute	#
Breadth and depth	#
Scale of life sciences business	#
Growth of life sciences business	#
Outcomes realized	#
Innovation capability	#
Strategy and vision	#
Life sciences technology innovation	#
Co-innovation and collaboration	#
Outcomes realized	#
OneOffice alignment	#
Voice of the customer	#

Strengths	Development opportunities
• Organization • Growth • Go-to-market • Talent management • Outcomes • Voice of the customer	• Organization • Growth • Go-to-market • Talent management • Outcomes • Voice of the customer

Strengths of the service provider based on mentioned parameter

HFS and customer feedback recommendations for the service provider to develop

Analyst understanding of strategy, metrics, programs & perception

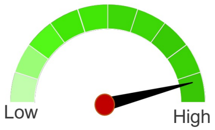
Sections and headings are standardized for all profiles

Geographic spread of clients	IT vs. BPS revenue	Project vs. annuity revenue
		

Average maturity of capabilities across the life sciences value chain

Not a focus (1) Emerging (2) Mature (3)

Maturity across the value chain



Sustainability meter

Life sciences-relevant acquisitions and partnerships	Key clients	Global operations and resources	Life sciences in-house platforms and tools
• Recent acquisitions that have added to Life science services • Key partnerships that contribute to Life science services	• Number of clients and key client names	• Headcount dedicated to and available for Life science services • Delivery location breakdown and key centers of excellence, etc.	• Intellectual property (IP), platforms, and tools key to Life science services

A consulting major with a strong client portfolio and investment commitment for innovation

EY

Dimension	Rank
HFS Top 10 position	**1**
Ability to execute	**1**
Breadth and depth	1
Scale of life sciences business	1
Growth of life sciences business	2
Outcomes realized	1
Innovation capability	**2**
Strategy and vision	5
Life sciences technology innovation	6
Co-innovation and collaboration	1
Outcomes realized	1
OneOffice alignment	**1**
Voice of the customer	**1**

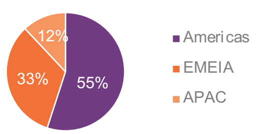
Strengths

- **Organization:** Health Sciences & Wellness (HS&W) is the dedicated team covering health payers, providers, and life sciences (biopharma, medtech, and biotech). HS&W contributes 9% of overall EY revenue. Of that, life sciences contributes 70% of total HS&W revenue. The life sciences focus areas aligned their services, offerings, and solutions to a buyer-based field-of-play framework along with area-level leads for each of key field of play or focus area, an intersection of industry and solutions expertise.
- **Growth:** The life sciences business growth was faster than both the broader EY business and the market CAGR for 2020.
- **Go-to-market:** Alignment with client agenda is the key principle EY applies to its GTM. It sequences competencies and capabilities to deliver to outcomes the client agenda defines.
- **Talent management:** EY leverages its strong global brand to attract talent, and it nourishes that talent with industry-specific expertise through ongoing training, sponsorship of an EY Tech MBA, EY badges to reflect expertise, e-learnings, and a technology career framework that drives retention.
- **Outcomes:** EY maintains a long-term view on value creation driven by a purpose to make lasting positive impacts on its stakeholders. In sales and marketing, this purpose is reflected in supporting a client's launch of 12+ rare-disease assets across CAPS, HIDS, FMF, and SJIA, improving at least 100 million patients' lives through connected medical systems and supporting three of the most significant oncology launches of the last decade. In the supply chain, example client-specific outcomes delivered include supporting a client in scaling the manufacturing of its COVID-19 vaccine to 1 billion doses in one year and helping it reduce the end-to-end cycle time required to produce the vaccine by nearly 70%.
- **Voice of the customer:** Relationship management, trust, and value proposition were viewed very positively by clients, who highlighted EY's clear understanding of process design and data-centric models that support digital twins and optimization.

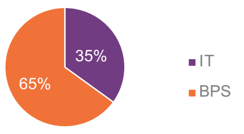
Development opportunities

- **Growth:** Growth is strong, but the trajectory could be more consistent.
- **Voice of the customer:** Solutions are robust, but they require attention on scaling to ensure sufficient talent is available to support them.

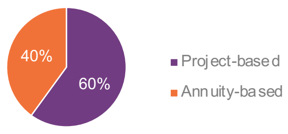
Geographic spread of clients



IT vs. BPS revenue



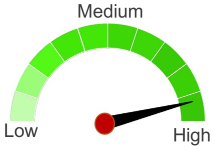
Project vs. annuity revenue



Average maturity of capabilities across the life sciences value chain

Research and development	Supply chain	Sales and marketing	Pharmacovigilance	Regulatory
2.3	3.0	2.8	1.7	2.2

Not a focus (1) — Emerging (2) — Mature (3)



Sustainability meter

Life sciences-relevant acquisitions and partnerships

Recent acquisitions
- **Pythagoras Communications:** UK technology company and Microsoft Gold Partner (2021)
- **Zilker Technology:** Digital consultancy and systems integrator firm (2020)
- **Pangea3:** Legal outsourcing services firm (2019)

Partnerships
- Adobe, Better, BioIntelliSense, IBM, Innoplexus, Microsoft, Pega, P&G, OMP, SAP, ServiceNow

Key clients

Number of life sciences clients: 7,500

Of the top life sciences companies, EY serves
- 100% of the top 20
- 90% of the top 50
- 75% of the top 100

Global operations and resources

Life sciences headcount: 23,500

Delivery locations
- Global team of delivery and innovation resources supporting life sciences clients across the Americas, EMEA, and APAC
- Numerous COEs, innovation centers, and labs that support innovation, including:
- Global network of 50 wavespace collaboration facilities
- EY Quantum Space
- EY-Nottingham Spirk Innovation Hub
- EY / Microsoft Technology Experience Center (TEC)

Life sciences in-house platforms and tools

- **Health Outcomes Platform (HOP):** A cloud-based, secure platform that radically simplifies how value-based pricing contracts are managed and reduces the associated risks for all parties
- **EY Smart Reviewer:** A product leveraging AI (machine learning and natural language processing) and automation to significantly accelerate and optimize the review and approval of promotional materials and content
- **QUADS (Quality Analytics and Decision Support):** An analytics-based solution to monitor quality systems' performance and compliance to support timely and accurate regulatory reporting, and impact assessments
- **Pointellis:** A secure information exchange platform currently used in individualized cell and gene therapy (ICGT) that collects and enables the trusted sharing of data and insights across the health eco-system
- **EY Smart Factory:** Embeds manufacturing excellence by arming the shop floor with dynamic predictive data analytics, virtual reality, and AI to deliver unprecedented performance

6 HFS Research authors

HFS Research authors

Rohan Kulkarni
Practice Leader – Healthcare and Life Sciences Research

rohan.kulkarni@hfsresearch.com

Rohan leads the Healthcare practice at HFS, bringing to bear his vast experience across the healthcare ecosystem. His experience includes being the Head of Healthcare Strategy at multiple Fortune 500 companies, Product Management leader, and CIO at two health plans. He is passionate about the Triple Aim (improving health outcomes, reducing the cost of care, and enhancing the care experience) and believes that health and healthcare is a polymathic opportunity that intersects with every industry and facet of our lives. His well-rounded experience and passion bring a practical approach to his analyst role at HFS.

Rohan has an engineering degree from the University of Mysore, India, an MBA from the University of Dundee & the London School of Economics in the UK, and Product Management diploma from the Harvard Business School.

Mayank Madhur
Associate Practice Leader

mayank.madhur@hfsresearch.com

Mayank Madhur is an Associate Director, Research at HFS Research, supporting different practice leads in industry research, IoT, and supply chain by working on data analysis, PoVs, and research writing.

He holds a certificate in Strategic Management from IIM Kashipur. Mayank holds a Master's in Business Administration from Birla Institute of Technology and Science College, Pilani (BITS, Pilani University) and a Bachelor's in Engineering in Electrical and Electronics from Jawaharlal Nehru National College of Engineering (Visvesvaraya Technological University), Karnataka.

HFS TOP 10

About HFS

Insight. Inspiration. Impact.

HFS is a unique analyst organization that combines deep visionary expertise with rapid demand side analysis of the Global 2000. Its outlook for the future is admired across the global technology and business operations industries. Its analysts are respected for their no-nonsense insights based on demand side data and engagements with industry practitioners.

HFS Research introduced the world to terms such as "RPA" (Robotic Process Automation) in 2012 and more recently, the HFS OneOfficeTM. The HFS mission is to provide visionary insight into the major innovations impacting business operations such as Automation, Artificial Intelligence, Blockchain, Internet of Things, Digital Business Models and Smart Analytics.

www.hfsresearch.com

hfsresearch

www.horsesforsources.com