



## PERSPECTIVE

# Perspective: IDC Health Insights' Top Preferred Life Science Technology Vendors for 2015

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## IN THIS PERSPECTIVE

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This IDC Health Insights Perspective discusses results from the 1Q15 *Leading Indicators in Life Science IT Spending Survey*, which polled 112 industry leaders on which life science vendors they plan to spend money with during 2015.

### Background

IDC Health Insights recently completed its 1Q15 *Leading Indicators in Life Science IT Spending Survey*, a biannual IT budget tracking survey of several hundred life science companies. The survey, which received responses from 112 industry leaders on planned IT budgetary spend, technology priorities, and vendor preferences, asked participants to identify which vendors servicing the life science market they expect to spend money with on software, hardware, and IT services during 2015. Each year, the line of inclusion is drawn at the logical breaking point where numbers drop off most significantly. For hardware and software, this now includes all vendors scoring over 10%, and for IT services, all vendors receiving a score over 3% were included. Below these thresholds, the remaining vendor scores drop off more significantly.

### Survey Results

#### Hardware

Dell maintained its lead in the hardware category, with 51% of life science companies expecting to purchase hardware from Dell over the next 12 months. Dell has held the top spot in this survey for over eight years.

Apple maintained its second place ranking once again as many life science companies have now standardized on Apple's platform.

IBM, which had experienced a significant jump in 2013's ranking by moving into third place from seventh place in 2012, once again continued to maintain its strong grasp on the third spot in this year's survey.

EMC made a notable move up to fourth place, from sixth the prior year.

Cisco, Oracle, Intel, and Siemens round out the rest of the list of vendors receiving significant mentions in this preferred vendor survey.

## Software

Oracle placed first among all software vendors as the most likely choice for life science software purchases during 2015, with 31% of life science companies planning to spend money with Oracle. SAP placed second, maintaining its ranking from last year with 23% of respondents expecting to purchase software from SAP in the coming year. Veeva, Medidata, SAS, Microsoft, Dassault Systèmes, and Apple all round out the remaining top 8 spots. Interestingly, Veeva continued its climb up the list, placing third overall, up one place from fourth in 2014, after jumping several spots from the eighth spot in 2013.

## IT Services

Accenture once again secured the top spot for the fifth year in a row, with 15% of life science companies planning to use its services in 2015. Cognizant also remained a standout, improving on its previous number 3 ranking, now placing second behind Accenture for the overall lead in the life sciences. PwC also achieved a significant increase over prior years, moving all the way up to third place, after not making the leader list over the past few years. IBM, IMS Health, TCS, HCL, and Wipro rounded out the fourth through eighth spots, with 19% of the industry planning to utilize their collective IT services in 2015 (see Table 1).

For comparative purposes, rankings from 2014 and 2013 are shown in Tables 2 and 3, respectively.

**TABLE 1**

### Top Life Science Vendors, 2015

Q. Which vendors are you most likely to spend money with during 2015?

| Ranking | Hardware | Share (%) | Software  | Share (%) | IT Services | Share (%) |
|---------|----------|-----------|-----------|-----------|-------------|-----------|
| 1       | Dell     | 51        | Oracle    | 31        | Accenture   | 15        |
| 2       | Apple    | 39        | SAP       | 23        | Cognizant   | 8         |
| 3       | IBM      | 35        | Veeva     | 19        | PwC         | 7         |
| 4       | EMC      | 20        | Medidata  | 15        | IBM         | 5         |
| 5       | Cisco    | 19        | SAS       | 13        | IMS         | 4         |
| 6       | Oracle   | 16        | Microsoft | 13        | TCS         | 4         |
| 7       | Intel    | 12        | Dassault  | 11        | HCL         | 3         |
| 8       | Siemens  | 10        | Apple     | 10        | Wipro       | 3         |

n = 112

Source: IDC Health Insights' *Leading Indicators in Life Science IT Spending Survey*, 1Q15

**TABLE 2****Top Life Science Vendors, 2014**

Q. Which vendors are you most likely to spend money with during 2014?

| Ranking | Hardware | Share (%) | Software  | Share (%) | IT Services | Share (%) |
|---------|----------|-----------|-----------|-----------|-------------|-----------|
| 1       | Dell     | 48        | Oracle    | 29        | Accenture   | 14        |
| 2       | Apple    | 42        | SAP       | 24        | IBM         | 8         |
| 3       | IBM      | 33        | Symantec  | 17        | Cognizant   | 8         |
| 4       | Cisco    | 22        | Veeva     | 15        | TCS         | 4         |
| 5       | Intel    | 18        | SAS       | 13        | Infosys     | 4         |
| 6       | EMC      | 15        | IBM       | 13        | IMS         | 4         |
| 7       | Oracle   | 13        | Microsoft | 11        | HCL         | 3         |
| 8       | Siemens  | 11        | Apple     | 10        | Wipro       | 3         |

n = 107

Source: IDC Health Insights' *Leading Indicators in Life Science IT Spending Survey*, 1Q14

**TABLE 3****Top Life Science Vendors, 2013**

Q. Which vendors are you most likely to spend money with during 2013?

| Ranking | Hardware | Share (%) | Software  | Share (%) | IT Services | Share (%) |
|---------|----------|-----------|-----------|-----------|-------------|-----------|
| 1       | Dell     | 55        | Oracle    | 33        | Accenture   | 14        |
| 2       | Apple    | 44        | SAP       | 22        | IBM         | 11        |
| 3       | IBM      | 39        | Symantec  | 19        | Cognizant   | 7         |
| 4       | Cisco    | 27        | SAS       | 14        | Capgemini   | 4         |
| 5       | Intel    | 22        | IBM       | 14        | TCS         | 3         |
| 6       | EMC      | 14        | Microsoft | 12        | IMS         | 3         |
| 7       | Sun      | 12        | Apple     | 11        | Infosys     | 3         |
| 8       | Siemens  | 10        | Veeva     | 10        | HCL         | 2         |

n = 102

Source: IDC Health Insights' *Leading Indicators in Life Science IT Spending Survey*, 1Q13

Note: Rankings are based on the percentage of life science companies planning to purchase goods and/or services from the vendors listed. Rankings do not reflect dollar size or volume of purchases. Conclusions in this document are an extrapolation of the life science industry's planned 2015 IT spending based on the 112 responses IDC Health Insights received to this survey.

IDC Health Insights' *Leading Indicators in Life Science IT Spending Survey* provides biannual guidance on life science IT spending trends, technologies priorities, and vendor preferences. The survey is part of IDC Health Insights' Life Science Business Systems Strategy service. For further information on data from this survey, refer to our 1Q15 *Leading Indicators in Life Science IT Spending Survey*.

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### Related Research

- *IDC MarketScape: Worldwide Life Science Manufacturing and Supply Chain Strategic Consulting 2013 Vendor Assessment* (IDC Health Insights #HI244494, November 2013)
- *IDC MarketScape: Worldwide Life Science Sales and Marketing Strategic Consulting 2013 Vendor Assessment* (IDC Health Insights #HI244309, November 2013)
- *IDC MarketScape: Worldwide Life Science CRM Software 2013 Vendor Assessment* (IDC Health Insights #HI242172, July 2013)
- *IDC MarketScape: Worldwide Pharmaceutical ePedigree Software 2013 Vendor Assessment* (IDC Health Insights #HI241152, May 2013)

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