

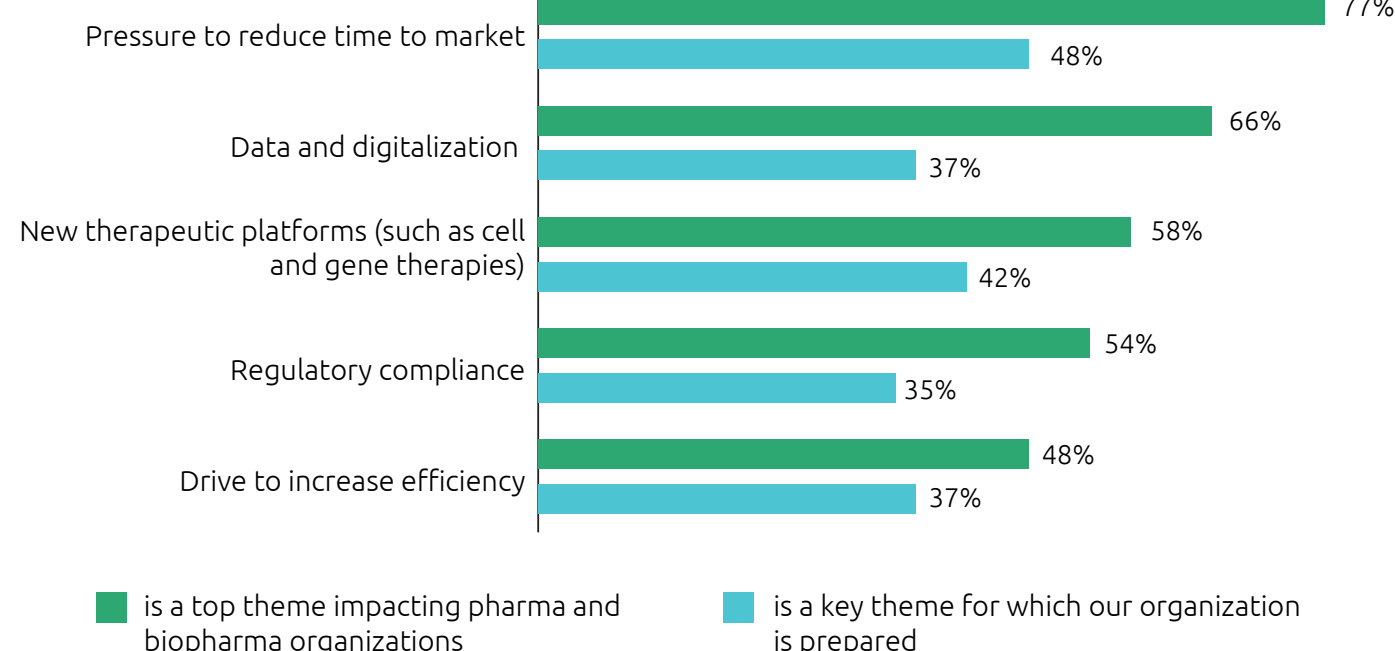
Building the next-gen pharma lab

DIGITALLY CONNECTED, ENVIRONMENTALLY SUSTAINABLE

Labs play a key role in the “molecule-to-medicine” value chain

The need for faster drug development, digitalization, and a shift towards innovative therapies are impacting pharma organizations globally

PERCENTAGE OF ORGANIZATIONS AGREEING TO THE STATEMENTS BELOW



Source: Capgemini Next-Gen Pharma Lab Survey, October 2023, N=235 pharma and biopharma organizations, N=702 respondents from pharma and biopharma labs.

Lab ecosystems can address industry pressures and emerging trends

The top drivers for lab modernization, digitalization, and transformation initiatives:

92%

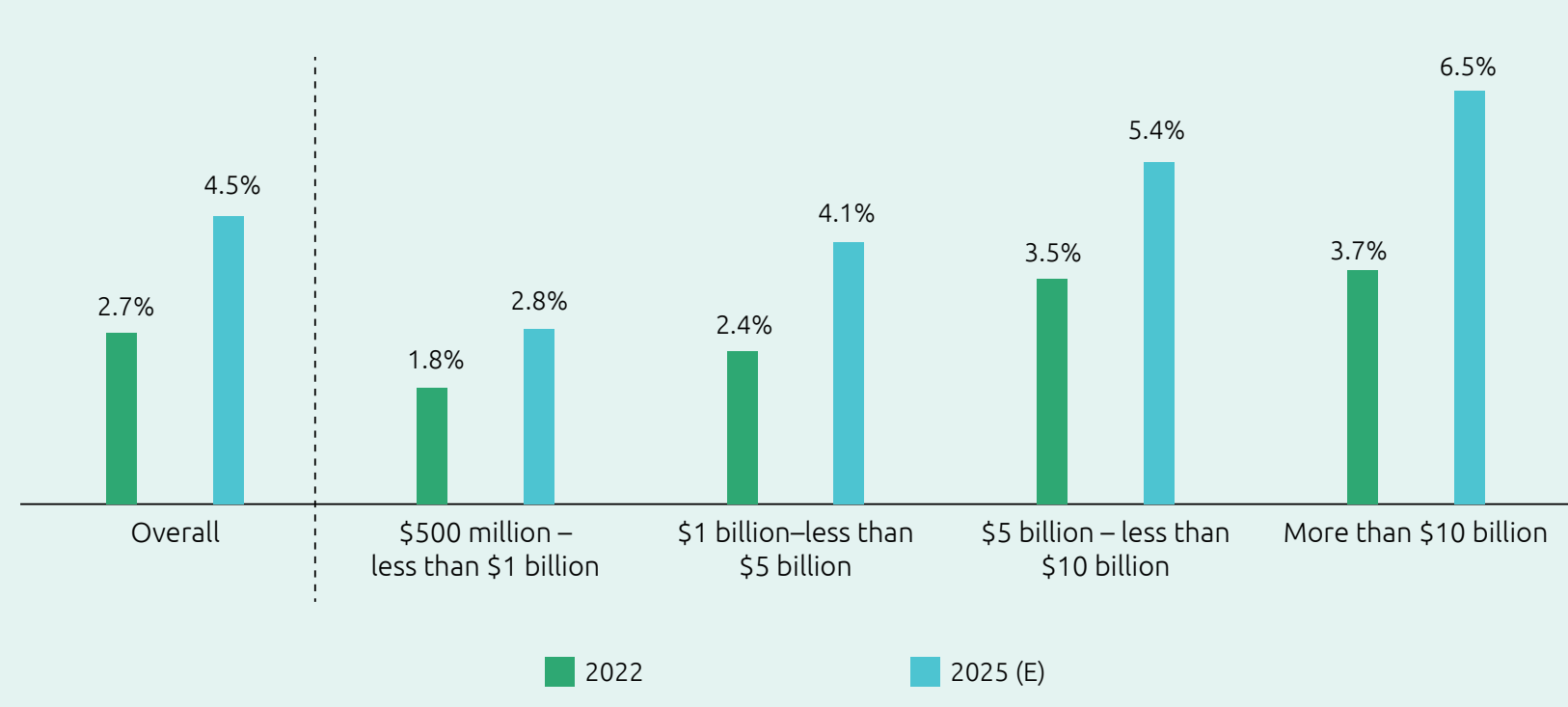
of pharma organizations say “accelerating time to market”

87%

of pharma organizations say “improving approval rates”

Investments in lab transformation are set to accelerate

TOTAL INVESTMENT IN LAB TRANSFORMATION AS A % OF ORGANIZATIONAL REVENUE

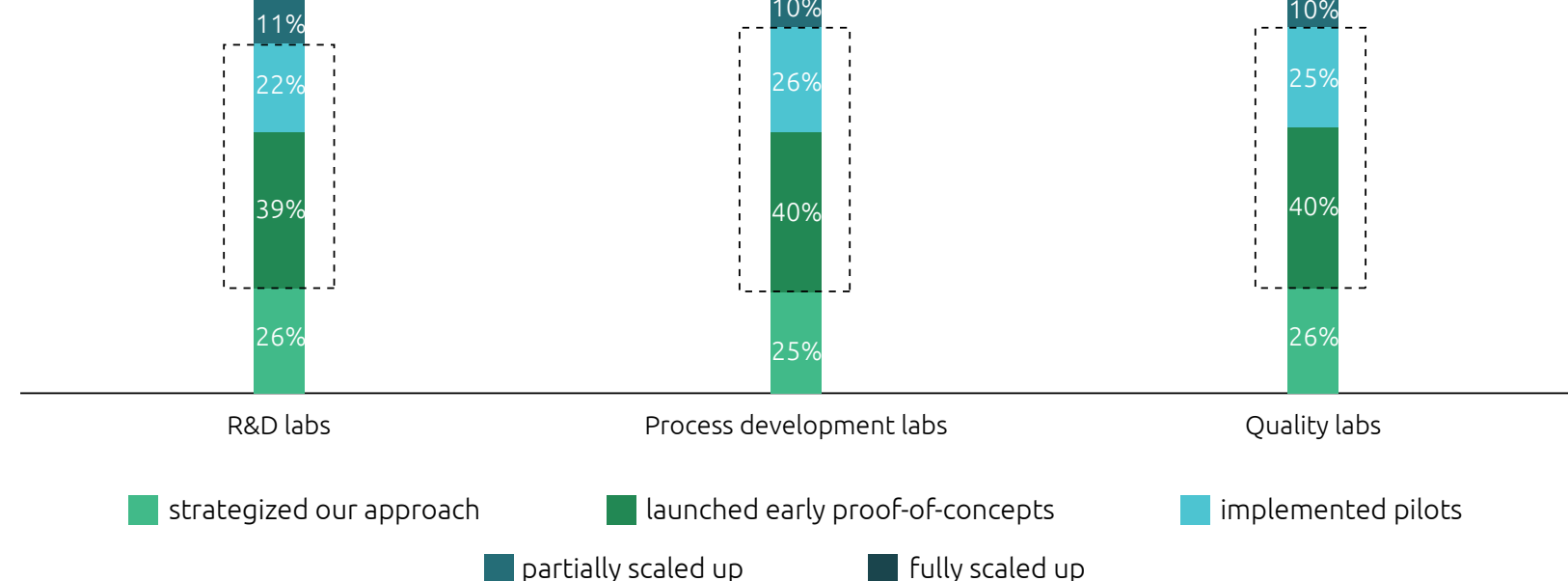


Source: Capgemini Next-Gen Pharma Lab Survey, October 2023, N=702 respondents from pharma and biopharma labs, N=235 pharma and biopharma organizations, N=35 organizations in the revenue range \$500 million–less than \$1 billion, N=126 organizations in the revenue range \$1 billion–less than \$5 billion, N=28 organizations in revenue range \$5 billion–less than \$10 billion, N=46 organization with revenue more than \$10 billion.

Most organizations are in the early stages of lab transformation

Most labs are at pilot or proof-of-concept (PoC) stage

FOR OUR LABS MODERNIZATION AND DIGITALIZATION INITIATIVES, WE HAVE:



Note: Numbers do not add to 100 percent due to rounding off

Source: Capgemini Next-Gen Pharma Lab Survey, October 2023, N=702 respondents from 235 pharma and biopharma labs, N=371 respondents associated with R&D labs, N=311 respondents associated with process development labs, N=309 respondents associated with quality labs in pharma and biopharma organizations

97%

of organizations are challenged to find scientists with a mix of domain and digital/data expertise

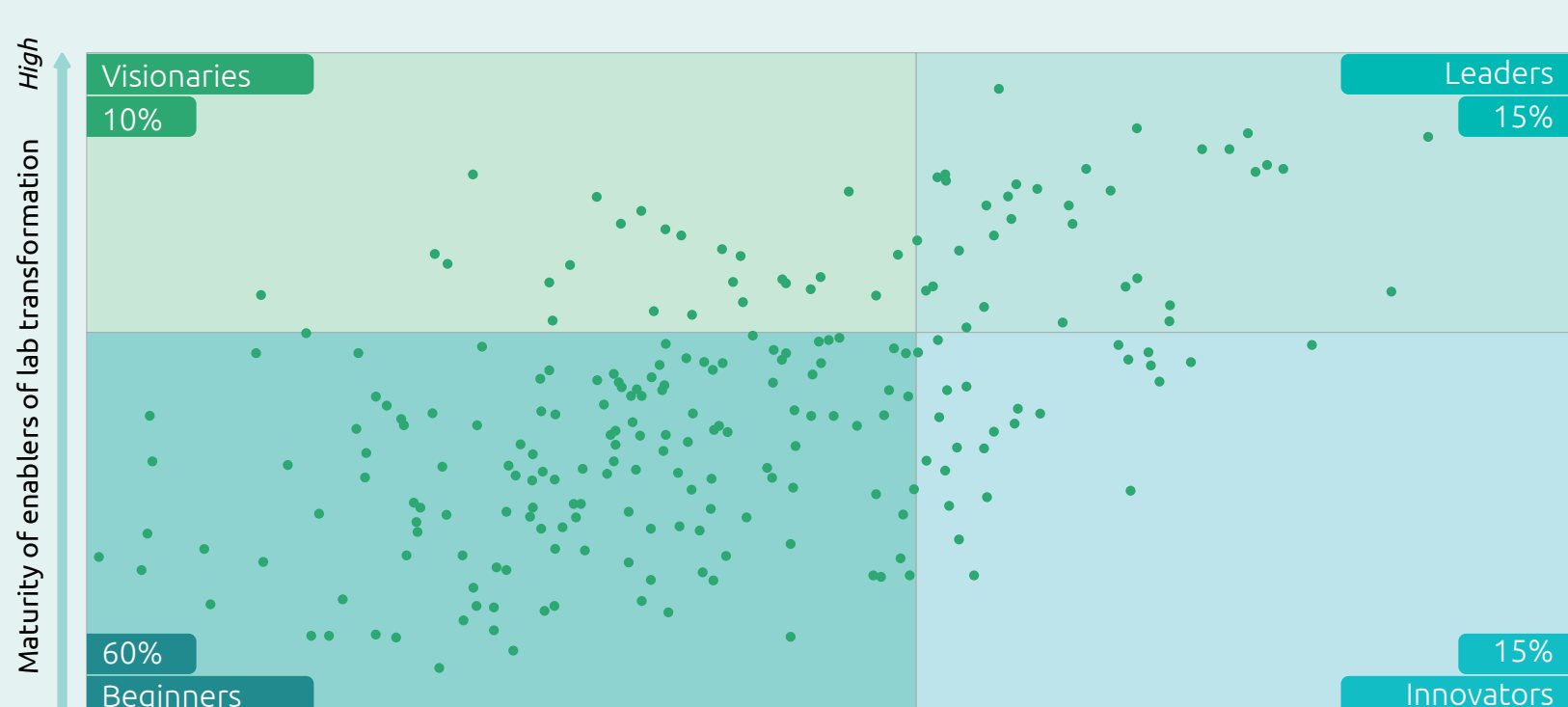
93%

of organizations believe that heterogeneity of data collected adds another layer of complexity

92%

of organizations recognize that process complexity ranks high in the challenges labs face

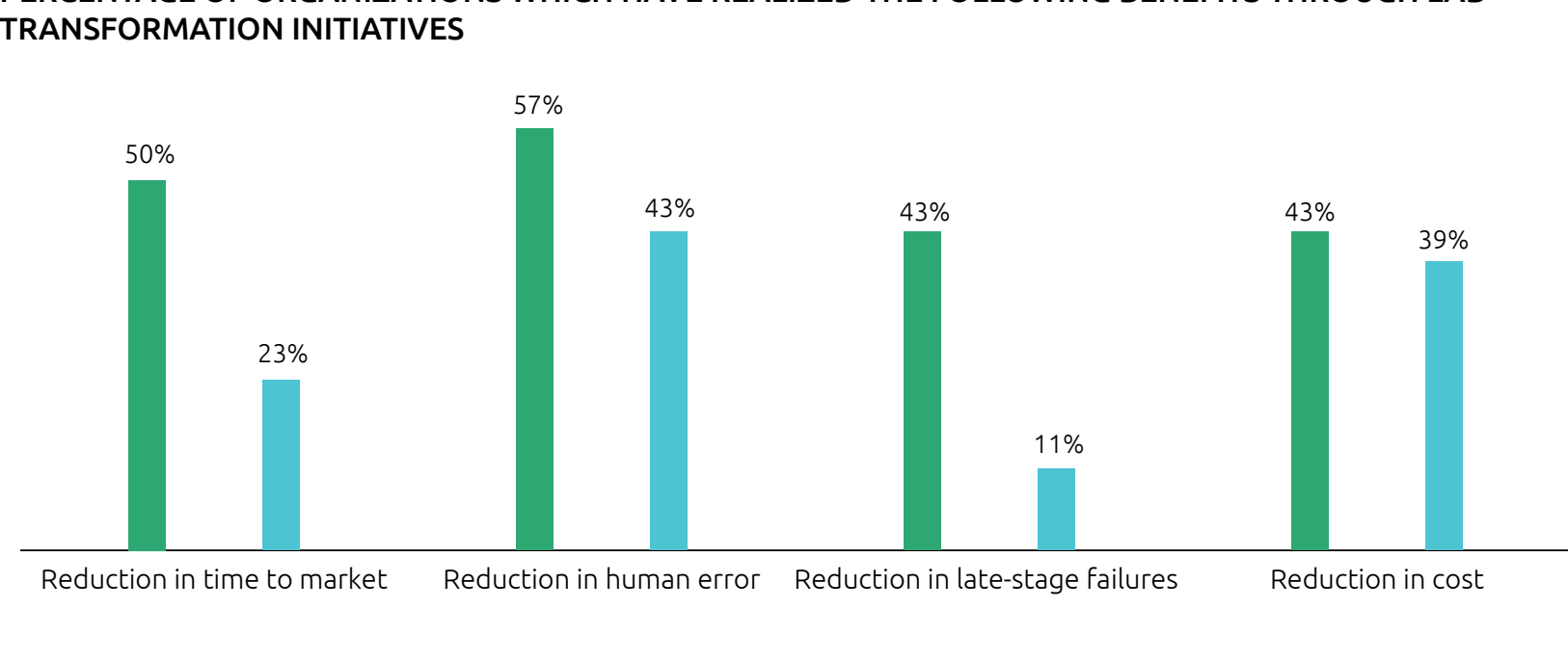
Only a minority of organizations are “leaders”



Source: Capgemini Next-Gen Pharma Lab Survey, October 2023, N=702 respondents from pharma and biopharma labs, N=235 pharma and biopharma organizations.

Leaders enjoy accelerated timelines, optimized costs, and greater approval rates

PERCENTAGE OF ORGANIZATIONS WHICH HAVE REALIZED THE FOLLOWING BENEFITS THROUGH LAB TRANSFORMATION INITIATIVES



Source: Capgemini Next-Gen Pharma Lab Survey, October 2023, N=98 pharma and biopharma organizations that are either piloting or partially/fully scaling lab transformation initiatives, N=14 leader organizations that are either piloting or partially/fully scaling lab transformation initiatives, N=56 beginner organizations that are either piloting or partially/fully scaling lab transformation initiatives.

How to build a next-gen pharma lab: learnings from the leaders

STRATEGIZE your approach to lab transformation

Design a future-ready architecture and technology stack

Build Intelligence through data and AI

Optimize your processes and workflows

Collaborate externally and internally

STRENGTHEN your approach towards next-gen lab skills

EMBED sustainability in products, processes and operations

Source: Capgemini Research Institute analysis.

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