ISG Provider Lens®

Life Sciences Digital Services

Clinical Development (Service Providers)

A research report evaluating IT service provider and CRO capabilities across key areas

Customized report courtesy of:

Deloitte.

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AI and platform ecosystems are driving unified transformation across the life sciences value chain

This study shows the life sciences services landscape progressing beyond function-specific transformation toward value-chain-wide modernization, with IT service providers and CROs both repositioning around integrated, AI-enabled and platform-led delivery. Across clinical development, patient engagement, pharmacovigilance, regulatory functions for CROs, and manufacturing, supply chain and commercial operations for service providers, the shift is moving from isolated digital interventions to connected operating models that integrate data, workflows, compliance and outcomes.

A defining pattern across the market is the transition from digital enablement to intelligence-led execution. GenAI is being embedded into protocol design, documentation, safety processing, engagement orchestration and commercial decision support, while agentic models are beginning to reshape how decisions, content and workflows are coordinated across the life sciences value chain. Rather than functioning as a standalone innovation layer, AI is increasingly being treated as the operating fabric enabling speed, quality, compliance and personalization.

Rising operational complexity and reduced tolerance for fragmented execution are shaping current market dynamics. Clinical and safety environments face demanding regulatory expectations, higher reporting volumes, growing inspection pressure and the need to align interconnected processes across development, regulatory and post-approval functions. Meanwhile, data estates remain distributed across clinical, quality, safety, engagement and enterprise platforms, making interoperability and unified governance essential to achieving transformation success.

A structural shift toward cloud-native, interoperable and platform-centric

AI-native, platform-driven transformation is redefining life sciences value chains

architectures is accelerating. Unified data foundations, API-led integration, microservices and connected ecosystems spanning clinical, safety, regulatory, engagement and enterprise platforms are emerging as the backbone of scalable modernization. This reflects a broader need for longitudinal visibility, cross-functional intelligence and regulatory-grade traceability throughout the product lifecycle.

Another major shift is the acceleration of decentralized and hybrid models. Clinical development and patient engagement are moving toward lower-friction, more distributed participation models supported by digital tools, remote interactions and real-world data integration. This is expanding the role of technology from workflow support to experience orchestration, with patient-centricity now directly linked to enrollment, retention, adherence and data continuity.

Within this context, CROs are evolving from execution-focused delivery partners to technology-enabled strategic actors. Clinical execution, patient engagement and safety operations are increasingly evaluated together, and differentiation is shifting toward the ability to combine hybrid trial infrastructure, AI-enabled workflows, integrated governance and predictable delivery.

Enterprise buyers are prioritizing end-to-end data integration, governance and execution visibility over point solutions. Across the value chain, the emphasis is on connected data environments that support faster decisions, stronger auditability and better workflow coordination. In clinical development, this requires interoperable ecosystems spanning study design, trial management, data capture and regulatory documentation. In patient engagement, it requires unified patient views across multiple interaction channels. In pharmacovigilance and regulatory functions, it demands harmonized environments linking safety, regulatory, clinical and quality systems.

Enterprises are also investing in AI, GenAI and automation as foundational levers of operational performance. Key priorities include accelerating protocol design, improving site selection, automating data mapping, detecting anomalies, enabling AI-assisted documentation, strengthening signal detection, personalizing engagement, improving adherence, supporting intelligent case processing and orchestrating next-best actions. The expectation is that AI will simultaneously reduce cycle times, improve decision quality and strengthen compliance.

Expectations differ across partner types. Service providers are expected to drive enterprise-level transformation and business layers combining platform engineering, cloud modernization, data foundations, commercial enablement and manufacturing digitization. CROs are expected to deliver differentiated value where operational depth intersects with digital execution, particularly in clinical delivery, patient engagement, pharmacovigilance operations and flexible sourcing models.

GenAI and agentic AI adoption priorities also vary by function. Clinical development focuses on protocol optimization, feasibility and intelligent documentation. Patient engagement emphasizes hyper-personalized journeys and conversational interfaces. Pharmacovigilance and regulatory functions prioritize automation, signal detection and structured authoring. Commercial operations focus on decision intelligence and content generation, while manufacturing and supply chain functions emphasize predictive and real-time operational insights.

The ecosystem is evolving through a mix of convergence and differentiation. Service providers are expanding their role through platform engineering, AI enablement, consulting-led transformation and managed services spanning commercial operations, manufacturing, supply chain and enterprise IT layers. Their strength lies in integrating front-, middle- and back-office systems into cohesive, scalable architectures.

CROs are advancing deeper into technology-enabled delivery within the regulated core of the value chain. They are embedding AI, analytics and digital platforms into clinical operations, patient engagement and pharmacovigilance processes to enhance execution quality, speed and predictability. Their evolution centers on combining operational depth with digital acceleration.

Executive Summary

Convergence is most visible in clinical data ecosystems, patient engagement and AI-driven orchestration. Both service providers and CROs are building capabilities around interoperable data platforms, workflow automation, predictive analytics and patient-centric models. Success in these areas depends on embedding intelligence directly into operational workflows.

Despite convergence, structural differentiation persists. CROs retain strengths in clinical execution, patient access, pharmacovigilance operations and flexible delivery models. Service providers maintain advantages in enterprise-scale transformation, including commercial platforms, manufacturing modernization, cloud infrastructure and cross-functional integration. The result is a complementary yet increasingly overlapping competitive landscape.

Ecosystem-led strategies are becoming more critical. Partnerships, co-innovation models and platform ecosystems play a key role in delivering integrated solutions that combine domain expertise, data interoperability and AI capabilities across the value chain.

The market is entering a new phase defined by progression from GenAI-enabled productivity to agentic coordination and, ultimately, more autonomous operations. Competitive advantage will increasingly depend on the ability to embed intelligence across end-to-end workflows spanning clinical development, patient engagement, pharmacovigilance, manufacturing and commercial functions.

Platformization will continue to intensify as unified data environments and interoperable architectures become essential for scaling AI in regulated environments. As a result, boundaries between service providers and CROs will continue to blur, particularly in clinical, patient and regulatory domains where data, execution and compliance intersect.

Future competitive shifts will be driven by the ability to combine regulatory-grade trust, connected data foundations, AI-native workflows and measurable business impact. The market will increasingly reward organizations that can translate value-chain complexity into integrated, intelligent and scalable operating models.

Life sciences enterprises are accelerating AI, GenAI and platform adoption to drive end-to-end integration across clinical, patient, regulatory and commercial functions. The convergence of service providers and CROs is reshaping delivery models, with increasing focus on data interoperability, intelligent workflows and patient-centric outcomes.

Provider Positioning

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	Clinical Development (Service Providers)	Patient Engagement (Service Providers)	Manufacturing and Supply Chain (Service Providers)	Pharmacovigilance and Regulatory Affairs - Digital Evolution (Service Providers)	Commercial Operations - Digital Evolution (Service Providers)	Clinical Development (CROs)	Patient Engagement (CROs)	Pharmacovigilance and Regulatory Affairs - Digital Evolution (CROs)
Accenture	Leader	Leader	Leader	Leader	Leader	Not In	Not In	Not In
Advanced Clinical	Not In	Not In	Not In	Not In	Not In	Product Challenger	Contender	Product Challenger
All for One Group	Not In	Not In	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In
Allucent	Not In	Not In	Not In	Not In	Not In	Contender	Not In	Contender
Altasciences	Not In	Not In	Not In	Not In	Not In	Contender	Not In	Not In
Altimetrik	Contender	Not In	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In
Apexon	Product Challenger	Product Challenger	Not In	Not In	Not In	Not In	Not In	Not In
Atos	Product Challenger	Market Challenger	Market Challenger	Not In	Not In	Not In	Not In	Not In
Beyondsoft	Not In	Contender	Not In	Contender	Not In	Not In	Not In	Not In
Birlasoft	Contender	Contender	Contender	Contender	Contender	Not In	Not In	Not In

Provider Positioning

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	Clinical Development (Service Providers)	Patient Engagement (Service Providers)	Manufacturing and Supply Chain (Service Providers)	Pharmacovigilance and Regulatory Affairs - Digital Evolution (Service Providers)	Commercial Operations - Digital Evolution (Service Providers)	Clinical Development (CROs)	Patient Engagement (CROs)	Pharmacovigilance and Regulatory Affairs - Digital Evolution (CROs)
Brillio	Contender	Contender	Contender	Not In	Contender	Not In	Not In	Not In
Caidya	Not In	Not In	Not In	Not In	Not In	Not In	Contender	Product Challenger
Capgemini	Leader	Leader	Leader	Leader	Leader	Not In	Not In	Not In
Celerion	Not In	Not In	Not In	Not In	Not In	Contender	Not In	Not In
Cencora Pharmalex	Not In	Not In	Not In	Not In	Not In	Product Challenger	Not In	Rising Star ★
CenExel	Not In	Not In	Not In	Not In	Not In	Contender	Contender	Not In
Charles River Laboratories	Not In	Not In	Not In	Not In	Not In	Market Challenger	Not In	Not In
CitiusTech	Not In	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In	Not In
Clario	Not In	Not In	Not In	Not In	Not In	Contender	Rising Star ★	Not In
Coforge	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Not In	Not In	Not In

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Cognizant	Leader	Leader	Leader	Leader	Leader	Not In	Not In	Not In
Deloitte	Leader	Leader	Leader	Leader	Leader	Not In	Not In	Not In
DXC Technology	Contender	Contender	Contender	Contender	Contender	Not In	Not In	Not In
Evotec	Not In	Not In	Not In	Not In	Not In	Product Challenger	Not In	Not In
Fortrea	Not In	Not In	Not In	Not In	Not In	Product Challenger	Product Challenger	Market Challenger
Frontage Laboratories	Not In	Not In	Not In	Not In	Not In	Contender	Not In	Not In
Genpact	Not In	Product Challenger	Leader	Market Challenger	Market Challenger	Not In	Not In	Not In
HCLTech	Leader	Leader	Leader	Leader	Leader	Not In	Not In	Not In
Hexaware	Leader	Leader	Not In	Not In	Rising Star ★	Not In	Not In	Not In
Hitachi Digital Services	Market Challenger	Product Challenger	Market Challenger	Not In	Not In	Not In	Not In	Not In

Provider Positioning

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ICON plc	Not In	Not In	Not In	Not In	Not In	Leader	Leader	Leader
Indegene	Product Challenger	Product Challenger	Not In	Product Challenger	Leader	Not In	Not In	Not In
Infosys	Leader	Leader	Leader	Leader	Leader	Not In	Not In	Not In
Innova Solutions	Product Challenger	Contender	Product Challenger	Product Challenger	Market Challenger	Not In	Not In	Not In
IQVIA	Not In	Not In	Not In	Not In	Not In	Leader	Leader	Leader
Kyndryl	Contender	Contender	Contender	Not In	Contender	Not In	Not In	Not In
LTM	Rising Star ★	Product Challenger	Leader	Contender	Product Challenger	Not In	Not In	Not In
Marlabs	Not In	Not In	Contender	Product Challenger	Not In	Not In	Not In	Not In
Medpace	Not In	Not In	Not In	Not In	Not In	Rising Star ★	Product Challenger	Product Challenger
NexusTek	Contender	Contender	Contender	Contender	Contender	Not In	Not In	Not In

Provider Positioning

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	Clinical Development (Service Providers)	Patient Engagement (Service Providers)	Manufacturing and Supply Chain (Service Providers)	Pharmacovigilance and Regulatory Affairs - Digital Evolution (Service Providers)	Commercial Operations - Digital Evolution (Service Providers)	Clinical Development (CROs)	Patient Engagement (CROs)	Pharmacovigilance and Regulatory Affairs - Digital Evolution (CROs)
NTT DATA	Leader	Rising Star ★	Leader	Not In	Market Challenger	Not In	Not In	Not In
Orion Innovation	Contender	Not In	Not In	Contender	Not In	Not In	Not In	Not In
Parexel	Not In	Not In	Not In	Not In	Not In	Leader	Market Challenger	Leader
Persistent Systems	Product Challenger	Product Challenger	Product Challenger	Rising Star ★	Product Challenger	Not In	Not In	Not In
PPD	Not In	Not In	Not In	Not In	Not In	Leader	Leader	Leader
Quantiphi	Product Challenger	Product Challenger	Contender	Product Challenger	Contender	Not In	Not In	Not In
Stefanini	Not In	Product Challenger	Not In	Not In	Not In	Not In	Not In	Not In
Syneos Health	Not In	Not In	Not In	Not In	Not In	Leader	Leader	Leader
Tata Elxsi	Contender	Not In	Market Challenger	Contender	Not In	Not In	Not In	Not In
TCS	Leader	Leader	Leader	Leader	Leader	Not In	Not In	Not In

Provider Positioning

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Tech Mahindra	Leader	Product Challenger	Rising Star	Leader	Leader	Not In	Not In	Not In
TFS International	Not In	Not In	Not In	Not In	Not In	Contender	Contender	Not In
T-Systems	Product Challenger	Not In	Not In	Not In	Not In	Not In	Not In	Not In
UST	Product Challenger	Market Challenger	Market Challenger	Contender	Market Challenger	Not In	Not In	Not In
Veristat	Not In	Not In	Not In	Not In	Not In	Contender	Contender	Product Challenger
Virtusa	Contender	Contender	Contender	Not In	Product Challenger	Not In	Not In	Not In
Wipro	Leader	Leader	Leader	Leader	Leader	Not In	Not In	Not In
Worldwide Clinical Trials	Not In	Not In	Not In	Not In	Not In	Product Challenger	Market Challenger	Product Challenger
WuXi AppTec	Not In	Not In	Not In	Not In	Not In	Market Challenger	Market Challenger	Not In
Zensar Technologies	Contender	Product Challenger	Product Challenger	Contender	Product Challenger	Not In	Not In	Not In

This study focuses on **digital transformation solutions and services** for the **life sciences** industry.

Simplified Illustration Source: ISG 2026

Scope of the Report

This ISG Provider Lens® quadrant report covers the following eight quadrants for services/ solutions: Clinical Development (Service Providers), Patient Engagement (Service Providers), Manufacturing and Supply Chain (Service Providers), Pharmacovigilance and Regulatory Affairs - Digital Evolution (Service Providers), Commercial Operations - Digital Evolution (Service Providers), Clinical Development (CROs), Patient Engagement (CROs) and Pharmacovigilance and Regulatory Affairs - Digital Evolution (CROs)

This ISG Provider Lens® study offers IT-decision makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments
- Focus on Global market

This ISG Provider Lens® study offers IT-decision makers: Our study serves as the basis for important decision-making in terms of positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing provider.

Provider Classifications

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between $20 million and $999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens® quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens® quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/ services and follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

Clinical Development (Service Providers)

Who Should Read This Section

This report is valuable for service providers offering clinical development globally to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

Digital professionals

Should read this report to understand providers' digital capabilities across clinical trial design, execution and analytics. The insights support informed decision-making while selecting partners that can enable decentralized trials, data-driven operations and patient-centric clinical development models.

Technology professionals

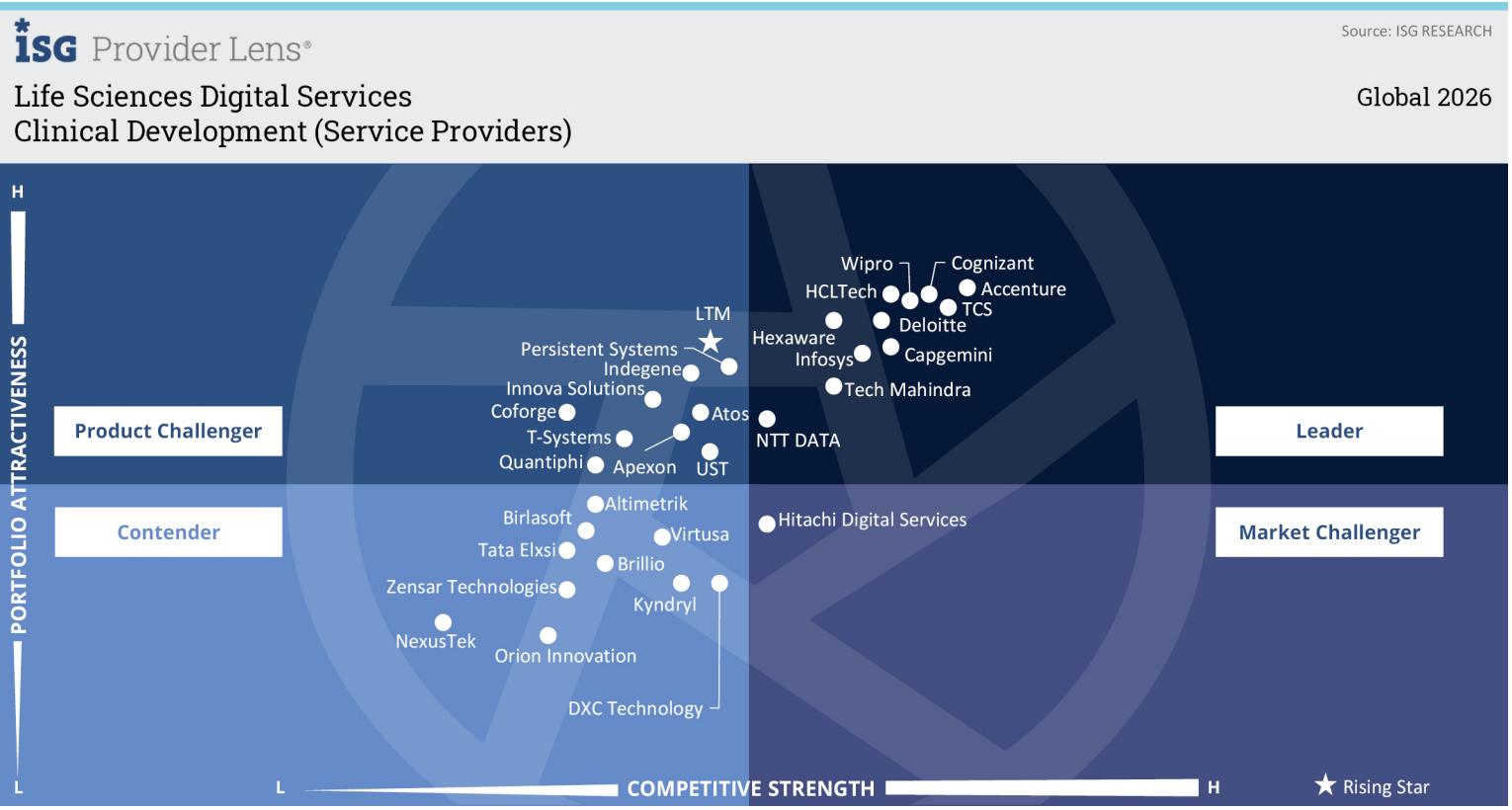
Should read this report to gain insight into platforms, data architectures, automation tools and advanced analytics leveraged by providers in clinical development. The report highlights key technology investments, innovation priorities and challenges influencing scalable and compliant digital trial execution.

Clinical operations and R&D practitioners

Should read this report to gain a deeper understanding of how providers support end-to-end clinical development workflows. The analysis enables stakeholders to evaluate solutions that enhance trial efficiency, accelerate timelines, improve patient engagement and generate measurable value throughout the development lifecycle.

Cybersecurity and compliance professionals

Should read this report to assess how providers manage data security, privacy and regulatory compliance across digitally enabled clinical development environments, including patient data protection, system integrity and adherence to global regulatory requirements. The report highlights providers' approaches to security architecture, governance, compliance management and risk mitigation in highly regulated life sciences settings.



The quadrant assesses providers on their ability to deliver **AI-enabled, end-to-end clinical development transformation** with measurable outcomes. It highlights strengths in **regulatory-grade execution, digital integration and scalable trial modernization.**

Rohan Sinha

Definition

This quadrant evaluates service providers based on their capabilities and strategic vision in clinical development, including technology and services that facilitate efficient, compliant and data-driven drug development. Clinical development spans the entire lifecycle of a clinical trial, across study design, site selection, patient recruitment, data capture, monitoring and regulatory submission. Service providers are assessed on their ability to deliver digital, AI-enabled and cloud-based solutions that improve trial speed, quality and patient engagement while ensuring GxP compliance.

The evaluation also considers innovation in decentralized and hybrid trial models, as well as the integration of real-world evidence (RWE) and platform-driven delivery. Providers that combine deep domain expertise with scalable technology platforms and collaborative engagement models are well positioned to lead the next generation of connected intelligent clinical development.

Eligibility Criteria

1. Long-term commitment to clinical innovation, investment in domain expertise and alignment with industry priorities such as **decentralized trials, AI adoption** and **patient-centric models**
2. Breadth and maturity of offerings across **eClinical platforms, data management, pharmacovigilance (PV)** and **regulatory solutions**
3. Expertise in delivering **validated, compliant and interoperable** systems leveraging **cloud, AI and automation**
4. Proven ability to **scale globally,** maintain **quality and compliance,** and deliver complex multiregion projects efficiently through **agile and automated delivery models**
5. Demonstrated thought leadership in **hybrid and digital trials, RWE integration** and **data-driven decision-making** using advanced analytics and GenAI tools
6. Evidence of measurable impact in **accelerating study timelines, reducing operational costs** and **enhancing data integrity.**
7. Positive client feedback and referenceable success stories, reinforcing market credibility
8. Strong alliances with t**echnology vendors, CROs** and **regulators,** enabling end-to-end transformation across the clinical value chain

Observations

The clinical development services landscape is evolving rapidly, shaped by increasing protocol complexity, decentralized trial models and growing regulatory scrutiny. Providers are repositioning from traditional functional outsourcing toward integrated, AI-enabled transformation partners. There is a visible shift from siloed clinical operations to connected, end-to-end lifecycle strategies that link study design, data management, regulatory alignment and post-approval evidence generation within unified digital ecosystems.

A defining theme is the rise of AI and advanced analytics as foundational enablers rather than experimental add-ons. Providers are embedding automation, predictive modeling and agentic workflows across feasibility, site selection, data review and document authoring, while emphasizing responsible AI governance in regulated environments. Platform-centric models and cloud-native architectures are becoming central to improving interoperability and enabling scalable, data-driven decision-making.

Another notable trend is the growing focus on patient-centricity and decentralized capabilities, supported by wearable integration, remote monitoring and real-world data utilization. Buyers increasingly expect measurable outcomes, operational resilience and global delivery scale alongside innovation. Differentiation in the quadrant is increasingly defined by the ability to combine domain depth, regulatory rigor, digital acceleration and execution maturity to develop cohesive, value-driven clinical transformation programs.

From the 40 companies assessed for this study, 32 qualified for this quadrant, with 11 being Leaders and one Rising Star.

accenture

Accenture positions clinical development within an end-to-end R&D reinvention strategy, combining AI, digital platforms and regulatory integration to improve speed, cost and outcomes. Its scalable digital core enables enterprise-wide, measurable clinical transformation.

Capgemini

Capgemini delivers an end-to-end clinical development strategy spanning design to closure, focused on measurable gains in speed, quality and success rates. Its AI-first, integrated delivery model combines consulting and operations to drive scalable, compliant transformation.

cognizant

Cognizant embeds clinical development within an end-to-end life sciences strategy spanning discovery to commercial. Its AI- and data-led priorities and orchestrated delivery model integrate clinical and regulatory systems to enable scalable, enterprise-wide transformation.

Deloitte.

Deloitte advances clinical development through next-generation study design, FAIR data architecture and integrated sample management. Its platform-led transformation and responsible GenAI enable intelligent, compliant and patient-centric trial execution across the lifecycle.

HCLTech

HCLTech embeds clinical development within an AI-first life sciences strategy that integrates regulatory and safety functions. Its proprietary, compliance-ready platforms and domain-led agentic AI enable scalable, decentralized trial execution with validation, security and GxP rigor.

HEXAWARE

Hexaware embeds clinical development in an AI-first strategy focused on faster cycles and improved data quality. Its EDC-agnostic automation platform and agent-based ecosystem deliver scalable, production-ready AI across feasibility and clinical workflows.

Infosys

Infosys drives AI-first clinical development, scaling GenAI and agentic AI across trials and documentation. Supported by domain expertise and production-grade deployments, it delivers measurable impact in regulated environments.

NTT DATA

NTT DATA advances AI-driven clinical development through agentic workflow redesign, end-to-end services and evidence-led analytics, enabling integrated and insight-driven trial execution.

TCS

TCS advances science-led clinical development through AI-driven decision intelligence and platform-centric transformation. Its modular digital suite, automation strength and deep system integration enable scalable, standardized execution across complex, global trial ecosystems.

Tech Mahindra

Tech Mahindra delivers agentic AI-led clinical development with compliance-by-design rigor. Its platform-centric approach and strong integration across decentralized trial systems enable scalable, patient-centric execution in regulated environments.

Wipro

Wipro embeds clinical development within its life sciences strategy, integrating trial, regulatory and safety functions. Its AI-first, digital approach and connected platform stack enable decentralized, data-rich, patient-centric trials with scalable, cloud-enabled execution.

LTM

LTM (Rising star) advances AI-first, outcomes-led clinical development focused on faster timelines and regulatory rigor. Its unified data and AI platform enables scalable, insight-driven decision support, backed by broad capabilities across decentralized trials, analytics and clinical technology transformation.

Leader

"Deloitte is re-imagining clinical development through next-generation study design, connected data ecosystems and responsible AI to deliver smarter, more patient-centric trials at scale."

Rohan Sinha

Deloitte

Overview

Deloitte is headquartered in London, U.K. It has more than 473,000 employees across over 150 countries. In FY25, the company generated $70.5 billion in revenue. Deloitte brings a combination of strategic insight, digital transformation capabilities and operational rigor to help clients improve the speed, quality and efficiency of clinical development programs. Deloitte's solutions emphasize connected digital data flows that make clinical information findable, accessible, interoperable and reusable (FAIR), while integrating real-world evidence and advanced predictive models to improve design, recruitment and monitoring strategies.

Strengths

Next-generation study and data design: Deloitte advances clinical development through next-generation study design that reduces protocol complexity, improves patient experience and optimizes efficiency. These capabilities include protocol optimization, enrollment forecasting using RWE and SDoH, intelligent site selection and cost modeling, integrated with digital data flow solutions.

Digitized data and sample excellence: Deloitte helps generate FAIR clinical data through modern architecture, data management, eSource, RBQM, automated mapping and multi-modal integration. Complementary sample management capabilities, including operating model design, system integration and assay analytics, enhance traceability and operational performance across the study lifecycle.

Platform and responsible AI enablement: Deloitte drives transformation through Veeva Systems strategy and implementation across CTMS, EDC, eTMF and study startup. Responsible GenAI and agentic AI support document authoring, intelligent study assistants and AI-driven risk insights, underpinned by GxP-aligned governance and validation frameworks. By embedding responsible AI principles across the development lifecycle, Deloitte ensures innovation is delivered with the compliance integrity and traceability that life sciences organizations require for validation.

Caution

Deloitte's strong consulting-led and strategy-driven positioning in clinical development could be complemented by improved articulation of scaled managed services and operational delivery depth, especially for organizations seeking long-term run-and-operate partnerships alongside transformation support.

Appendix

Methodology & Team

The ISG Provider Lens® 2026 – Life Sciences Digital Services study analyzes the relevant software vendors/service providers in the Global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens® program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. The data collected for this report represent information that ISG believes to be current as of April 2026 for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

All revenue references are in U.S. dollars ($US) unless noted otherwise.

The study was conducted in the following steps:

1. Definition of Life Sciences Digital Services market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Leverage ISG's internal databases and advisor knowledge & experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts & figures received from providers and other sources.
6. Use of the following key evaluation criteria:
   * Strategy and vision
   * Innovation
   * Brand awareness and presence in the market
   * Sales and partner landscape
   * Breadth and depth of portfolio of services offered
   * Technology advancements

Lead Author

Rohan Sinha

Senior Manager and Principal Analyst

Rohan Sinha is a seasoned professional with over a decade of experience as an analyst in the healthcare and life sciences industries. He has been at the forefront in offering strategic guidance to industry CIOs, leveraging a wealth of published research and extensive interactions with industry stalwarts.

His work has been instrumental in shaping the strategies and decisions of organizations in these critical industries. Rohan also possesses a keen interest in the world of AI and GenAI, where he continually explores the significant impact of these cutting-edge technologies on the said industries.

Lead Author and Research Analyst

Sneha Jayanth

Lead Analyst

Sneha Jayanth is a Lead Analyst at ISG with over eight years of experience in ICT-related market intelligence and thought leadership. She plays a pivotal role in leading and co-authoring ISG Provider Lens® studies across Healthcare, Life Sciences, Medical Devices, and custom research engagements. Her work has contributed to shaping enterprise strategies by delivering actionable insights on market trends and technology adoption.

Sneha's background includes research on transformative technologies such as IoT, AI, cloud, and Analytics and developing thought leadership in the ICT sector. She also leads the creation of IPL reports that capture key trends and insights relevant to the broader provider landscape. Her research is recognized for its depth, clarity, and strategic value in guiding decision-makers in complex and evolving industries.

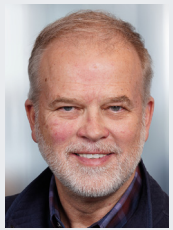
Study Sponsor

Iain Fisher
Director, Research

Iain Fisher is ISG's head of industry research and market trends. With over 20 years in consulting and strategic advisory, Iain now focuses on cross industry research with an eye on technology led digital innovation, creating new strategies, products, services, and experiences by analyzing end-to-end operations and measuring efficiencies focused on redefining customer experiences. Fisher is published, known in the market and advises on how to achieve strategic advantage. A thought leader on Future of Work, Customer Experience, ESG, Aviation and cross industry solutioning. He provides major market insights leading to changes to business models and operating models to drive out new ways of working.

Fisher works with enterprise organizations and technology providers to champion the change in customer focused delivery of services and solutions in challenging situations. Fisher is also a regular Keynote speaker and online presenter, having authored several eBooks on these subjects.

IPL Product Owner



Jan Erik Aase
Partner and Global Head – ISG Provider Lens®

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a partner and global head of ISG Provider Lens®, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

ISG Provider Lens®

The ISG Provider Lens® Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners. ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens® research, please visit this webpage.

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ISG

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The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

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ISG Provider Lens®

APRIL, 2026

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