ISG Provider Lens™

Life Sciences Digital Services

Manufacturing Supply Chain (Service Providers)

A research report comparing provider and CRO strengths, challenges and competitive differentiators

Customized report courtesy of:

LTIMindtree

QUADRANT REPORT | JUNE 2025 | GLOBAL

Table of Contents

Report Author: Rohan Sinha and Sneha Jayanth

Life sciences is strategically reinvented through digital, patient-centric and intelligence-driven approaches

The life sciences industry is undergoing a profound transformation, shaped by digital disruption, patient-first innovation and an unrelenting drive toward operational sustainability. Service providers that lead in this space are moving beyond traditional models by embracing AI, generative AI (GenAI), IoT and advanced analytics to reimagine value delivery across clinical development, manufacturing, commercial operations and patient engagement. At this pivotal juncture, the strategic imperative is clear: those who embed intelligence, interoperability and inclusivity across their value chain will accelerate innovation and redefine outcomes.

Agentic AI is swiftly becoming a cornerstone of transformation in life sciences, propelling the industry toward more intelligent, autonomous operations. Integrating AI-driven agents across clinical development, patient engagement and regulatory affairs, organizations are moving beyond traditional automation to create self-learning systems that continuously optimize processes. These intelligent agents are enhancing decision-making by providing real-time, data-driven insights, predicting patient needs, streamlining clinical trials and ensuring compliance with evolving regulations. As a result, agentic AI is accelerating innovation, improving outcomes and enabling organizations to navigate the complexities of a rapidly evolving healthcare landscape with unparalleled efficiency and precision.

Clinical development: Intelligence meets inclusion

The clinical development landscape is transitioning into an era defined by speed, precision and patient-centricity. AI-powered platforms are being used to accelerate protocol design and transform oversight and documentation. Real-time data capture, synthetic control arms and cloud-native architectures are enabling trials that are smart and responsive to real-world dynamics.

AI-powered trials and **patient-centric** models are **reshaping** the future of life sciences.

However, the most transformative change is the redefinition of a patient's role. Decentralized and hybrid trials, supported by telemedicine, wearables and virtual platforms, are enabling broader participation and inclusive research. The result is a trial experience that is no longer site-bound but seamlessly integrated into patients' lives.

To succeed, organizations must build ecosystems that unify AI, automation and human-centric design, balancing operational speed with ethical responsibility.

Patient engagement: From communication to connection

The patient engagement ecosystem is evolving into a dynamic, technology-driven landscape where patients are no longer passive recipients of care, but cocreators of their health journey. Leading service providers are deploying AI, telehealth platforms and personalized communication strategies to build continuous, proactive relationships with patients. The shift toward decentralized engagement and real-time feedback loops is improving retention, adherence and satisfaction, especially as digital tools offer multilingual, accessible and tailored experiences.

The future lies in platforms that go beyond merely informing patients and adapt to their needs. In this emerging paradigm, enterprise CIOs must prioritize investments in digital empathy — solutions that listen, learn and evolve.

Manufacturing: Smart, sustainable and adaptive

The manufacturing domain within life sciences is being redefined through the integration of Industry 4.0 technologies. AI-driven predictive maintenance, IoT-powered monitoring systems and cloud-based automation are now essential to delivering resilient, efficient and ethical operations. Service providers integrating analytics with sustainability and ensuring transparency from raw materials to final delivery stand out in this domain.

As consumer expectations evolve and regulatory scrutiny intensifies, smart manufacturing is no longer optional and has become a strategic necessity. Companies must move toward intelligent, adaptive systems that enable both cost savings and environmental stewardship.

Pharmacovigilance and regulatory affairs: From compliance to intelligence

Pharmacovigilance (PV) and regulatory functions are no longer isolated silos; they are becoming digital nerve centers for safety and market agility. Intelligent automation, AI-based surveillance and real-time regulatory intelligence are transforming how organizations process safety data, submit documentation and stay audit-ready.

Leading service providers are leveraging AI for Individual Case Safety Report (ICSR) management, predictive signal detection and case triage. Regulatory platforms, in turn, are enabling real-time dossier updates, submission tracking and cost-effective lifecycle management. This new digital backbone ensures that compliance becomes a strategic lever for speed and scalability.

Commercial operations: Personalization at scale

Commercial operations are entering an era where relevance and speed are non-negotiable. Leading service providers are using AI and GenAI to optimize every facet of sales, marketing and CX, driving smarter, faster and more personalized engagement than ever before. Omnichannel strategies have become the norm rather than exception, while value-based models align closely with patient and provider expectations.

In this environment, agility and compliance must coexist. AI-driven insights enable tailored messaging, while automation ensures that operations remain compliant amid shifting global regulations. In this context, success is defined by precision and not volume.

Contract research organizations (CROs): Integrated partners for accelerated innovation

From being transactional vendors to becoming full-spectrum innovation partners, CROs are redefining their role in the life sciences ecosystem. Their reach now spans clinical development, patient engagement and PV/regulatory affairs, fueled by AI platforms, digital trial capabilities and therapeutic expertise.

Clinical development: Adaptive, accelerated and insight-led

CROs are at the forefront of modern trial execution. They are leveraging predictive analytics, decentralized clinical trial (DCT) models and flexible staffing structures to deliver smarter, faster and more inclusive trials than ever before. With AI-driven workflows and real-time oversight platforms, CROs ensure that trials are both efficient and compliant, unlocking new opportunities for speed to market.

Patient engagement: Digital, diverse and human

CROs are transforming patient experiences in clinical trials using electronic patient recorded outcome (ePRO) tools, mobile apps, virtual assistants and multilingual engagement platforms to ensure that participation is frictionless and inclusive. With feedback loops and personalized communications, they are improving patient satisfaction and trial outcomes.In a decentralized trial landscape, this approach is critical.

"In a decentralized world, patient engagement is not an option — it's the engine of trial success."

PV and regulatory affairs: Globally agile, digitally precise

On the compliance front, CROs are embedding intelligent automation into ICSR processing, safety case management and end-to-end regulatory submissions. Their global-local approach, combining deep regional insights with real-time regulatory tools, helps clients navigate complexities with confidence. Offering integrated PV and regulatory ecosystems, CROs are helping sponsors avoid silos, reduce risk and enhance readiness.

Strategic outlook: Embracing the future of intelligent, patient-first life sciences

The convergence of AI, patient-centric design and evolving regulatory dynamics is reshaping the rules of engagement in life sciences. Whether in clinical trials, patient outreach, manufacturing or compliance, success will be defined by speed, empathy and intelligence.

To thrive in this landscape, enterprise leaders must:

- Invest in interoperable, AI-enabled platforms that provide visibility and automation across functions
- Prioritize inclusivity and human-centric design in patient engagement strategies
- Ensure compliance serves as a driver of acceleration rather than merely a gatekeeper
- Embed adaptability and sustainability into manufacturing and commercialization models

The leaders of tomorrow will not just respond to change; they will shape it. In this new era of life sciences, speed is no longer enough — being proper, responsible and radically human is of great importance.

Life sciences digital services are evolving into strategic enablers that connect data, technology and human insights across the value chain. With AI, automation and real-world evidence at the core, these services are streamlining trials, optimizing engagement and accelerating regulatory outcomes. The focus is shifting from standalone solutions to integrated platforms that enhance agility, compliance and patient-centric impact.

Provider Positioning

Page 1 of 7

	Clinical Development (Service Providers)	Patient Engagement (Service Providers)	Manufacturing 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	Not In	Not In	Contender
Altasciences	Not In	Not In	Not In	Not In	Not In	Contender	Not In	Not In
Altimetrik	Not In	Not In	Contender	Not In	Not In	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	Contender	Contender	Not In	Contender	Not In	Not In	Not In	Not In

Provider Positioning

Page 2 of 7

	Clinical Development (Service Providers)	Patient Engagement (Service Providers)	Manufacturing 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)
Birlasoft	Contender	Contender	Product Challenger	Contender	Contender	Not In	Not In	Not In
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	Product Challenger
CenExel	Not In	Not In	Not In	Not In	Not In	Contender	Not In	Not In
Charles River Laboratories	Not In	Not In	Not In	Not In	Not In	Market Challenger	Market Challenger	Not In
CitiusTech	Product Challenger	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In	Not In

Provider Positioning

Page 3 of 7

	Clinical Development (Service Providers)	Patient Engagement (Service Providers)	Manufacturing 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)
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
Cognizant	Leader	Leader	Leader	Leader	Leader	Not In	Not In	Not In
Conduent	Not In	Product Challenger	Not In	Not In	Not In	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

Provider Positioning

Page 4 of 7

	Clinical Development (Service Providers)	Patient Engagement (Service Providers)	Manufacturing 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)
Genpact	Not In	Product Challenger	Leader	Market Challenger	Market Challenger	Not In	Not In	Not In
HARMAN Tech Services	Contender	Market Challenger	Market Challenger	Contender	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	Market Challenger	Not In	Not In	Not In	Not In
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	Not In	Product Challenger	Contender	Not In	Not In	Not In

Provider Positioning

Page 5 of 7

	Clinical Development (Service Providers)	Patient Engagement (Service Providers)	Manufacturing 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)
IQVIA	Not In	Not In	Not In	Not In	Not In	Leader	Leader	Leader
Kyndryl	Contender	Contender	Market Challenger	Not In	Market Challenger	Not In	Not In	Not In
LTIMindtree	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 ★	Contender	Product Challenger
NTT DATA	Leader	Product Challenger	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	Rising Star ★	Product Challenger	Market Challenger	Product Challenger	Not In	Not In	Not In

Provider Positioning

Page 6 of 7

	Clinical Development (Service Providers)	Patient Engagement (Service Providers)	Manufacturing 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)
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	Market Challenger	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
Tech Mahindra	Leader	Product Challenger	Rising Star ★	Rising Star ★	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

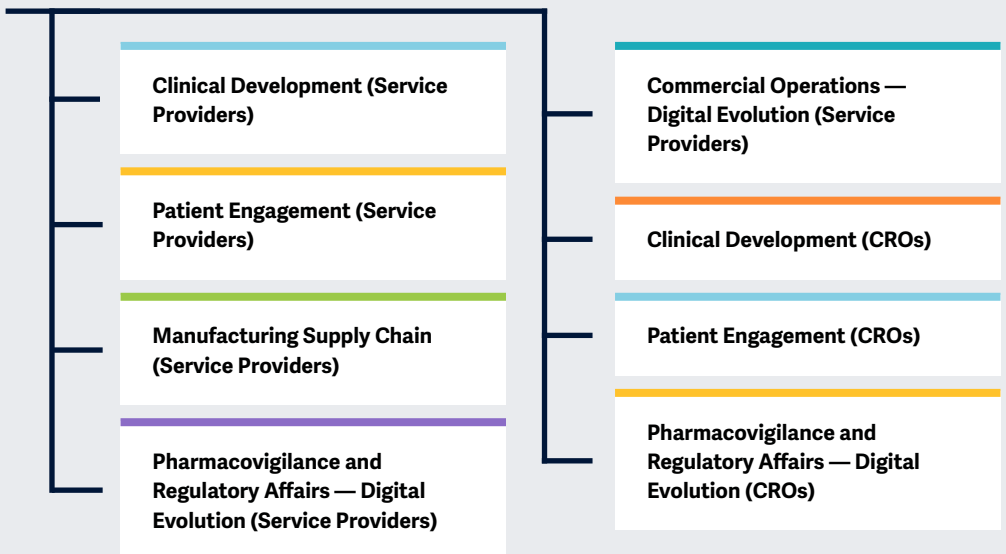
Provider Positioning

Page 7 of 7

	Clinical Development (Service Providers)	Patient Engagement (Service Providers)	Manufacturing 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)
UST	Market Challenger	Market Challenger	Market Challenger	Contender	Not In	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	Contender	Not In	Not In	Not In
Wipro	Leader	Leader	Leader	Leader	Leader	Not In	Not In	Not In
WNS	Contender	Contender	Contender	Product Challenger	Contender	Not In	Not In	Not In
Worldwide Clinical Trials	Not In	Not In	Not In	Not In	Not In	Product Challenger	Market Challenger	Rising Star ★
WuXi AppTec	Not In	Not In	Not In	Not In	Not In	Leader	Market Challenger	Not In
Zensar Technologies	Contender	Product Challenger	Contender	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 2025



Definition

The life sciences industry is witnessing a significant digital transformation driven by the urgent need to advance research and navigate regulatory complexities. Advanced technologies such as AI, ML and automation play a prominent role, yet issues with low-quality, outdated and incomplete data challenge their seamless integration into ongoing processes. The industry grapples with data centricity in R&D, emphasizing the importance of addressing data quality issues, particularly in master data management and governance. Despite progress, organizations struggle with data gaps, cross-business ownership and inconsistent quality. The imperative for reduced time-to-market prompts increased collaboration, but traditional tools result in data duplication and raise security concerns.

Industry leaders are navigating a landscape where innovation costs have surged exponentially. However, there is a need to adopt innovation at scale to enhance the efficiency of new business models that include AI-based solutions. Key pillars supporting efficiency in life sciences innovation include accelerated

mergers, acquisitions and divestitures; reliable supply chain innovation; exploration of non-traditional innovation sources; a patient-centric approach and creative strategies for monetizing non-traditional revenue sources. Digital transformation drives this shift, making enhanced connectivity, mobile engagement and advanced analytics essential in facilitating direct patient interactions.

Leading life sciences companies increasingly view outsourcing as a supplemental resource and strategic support, seeking expertise, bandwidth and technological guidance from external providers.

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 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 (quadrants)
- Focus on Global market

This ISG study serves as the basis for important decision-making by covering providers' positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

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 (exceptionsare 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 a 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.

Manufacturing Supply Chain (Service Providers)

Who Should Read This Section

This report is valuable for providers offering **manufacturing supply chain** services **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 learn about providers' capabilities and positioning, which will aid them in selecting suitable digital services and solutions for the manufacturing supply chain.

Technology professionals

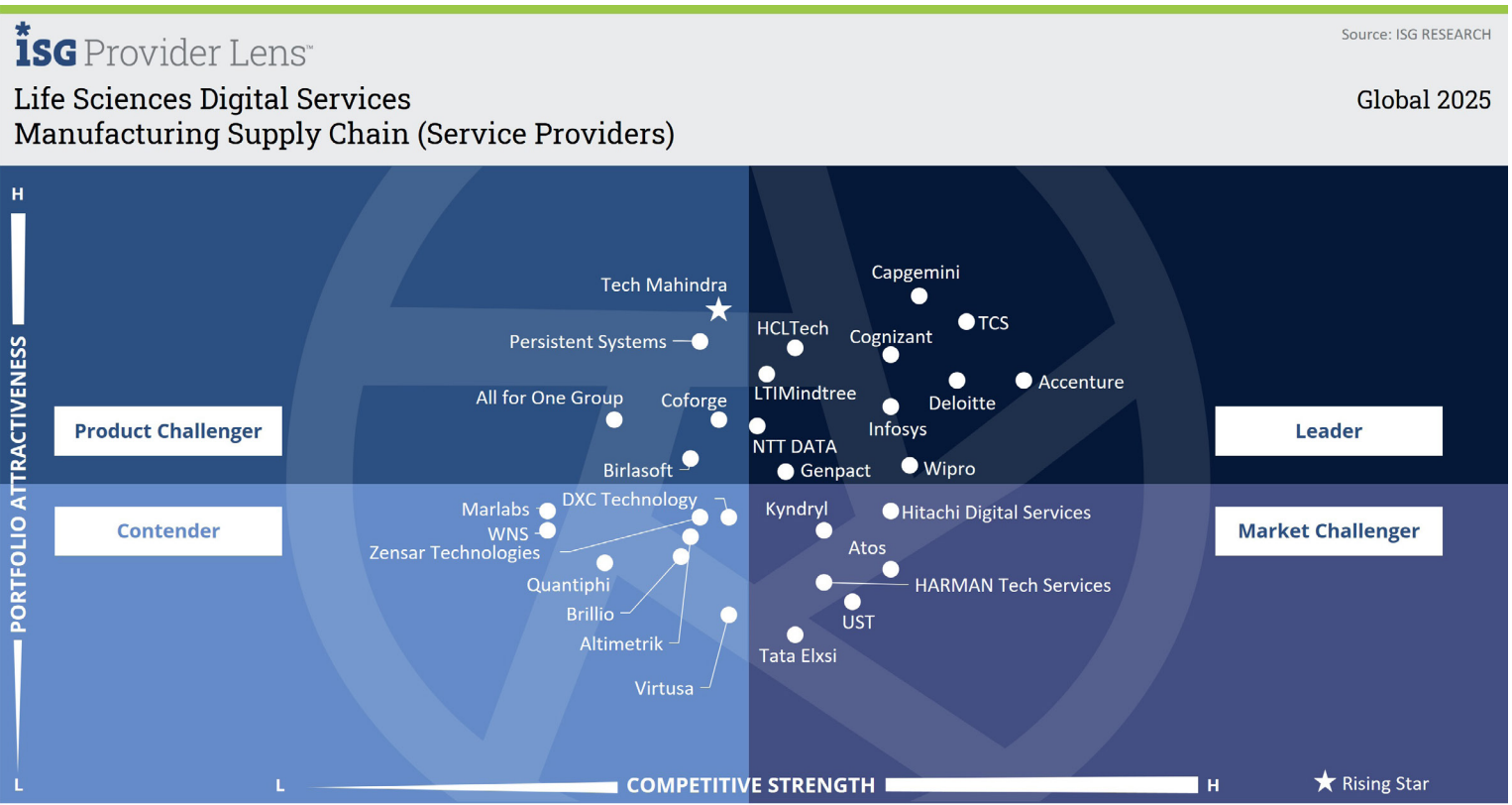
Should read this report to understand leading technologies, investment areas, challenges for digital innovators and key factors for achieving long-term success in the industry.

Industry practitioners

Should read this report to enhance their understanding of end-user solutions and develop business models that maximize CX and generate value for key life science stakeholders.

Cybersecurity professionals

Should read this report for insights into how providers tackle compliance and security challenges while ensuring a seamless experience for end users.



This quadrant evaluates **manufacturing solution providers** that **optimize inventory** and **quality control, highlighting smart practices that boost automation,** visibility and productivity.

Sneha Jayanth

Definition

This quadrant evaluates service providers that assist life sciences clients in enhancing their manufacturing supply chain operations. Digital transformation of these operations leverages advanced technologies and data-driven solutions to optimize manufacturing, distribution and supply chain management. It aims to improve efficiency, visibility and agility across the supply chain, from raw material procurement to production, quality control and distribution of pharmaceuticals and medical devices.

Central to this transformation is adopting digital technologies such as IoT, AI, blockchain and advanced analytics, which enhance real-time monitoring, traceability and collaboration. These advancements streamline operations, reduce lead times, minimize errors, ensure regulatory compliance and deliver safe, high-quality products to healthcare providers and patients. Ultimately, this digital transformation cultivates a more resilient, adaptive and responsive supply chain ecosystem.

Eligibility Criteria

1. **Capability to assess existing supply chains** and recommend strategy, process and technology changes to improve efficiencies, lower risks and reduce costs
2. Ability to transform manufacturing supply chain using digital methods and IoT, employing a variety **of automatic identification and data capture (AIDC) technologies**
3. Adept at providing **real-time visibility in logistics,** using sensors connected to systems that promptly provide status information (such as location or temperature) to the right people while changing routes as required and **predicting problems**
4. Ability to provide solutions for **complex supply chain structures,** including complex connectivity with **contract manufacturing** and advanced technologies to track and trace
5. Established or **emerging partnerships** with manufacturing supply chain specialists in life sciences and relevant technology providers
6. Expertise in **import/export compliance**
7. Ability to leverage **analytics** and **AI** to improve inventory relocation, forecasting accuracy and supply chain visibility; ensure adaptable planning to manage disruptions and enable seamless operations

Observations

The manufacturing supply chain landscape continues to evolve, shaped by technological advancements, sustainability demands and shifting consumer preferences. Overall market trends indicate a growing emphasis on digital transformation, with companies increasingly integrating automation and data analytics to enhance efficiency and responsiveness. This year's quadrant dynamics reflect a shift toward more provider collaborations, fostering innovation and agility in response to market volatility.

Provider positioning has notably shifted, with several key players rising to prominence while others have adapted their strategies. The focus has moved toward holistic supply chain solutions encompassing digital manufacturing capabilities, logistics and services. Many providers are also prioritizing sustainability initiatives, responding to regulatory pressures and customer expectations.

Activity in M&A has been significant, as seen in other quadrants. Key transactions include mergers to expand geographic reach and enhance service offerings, particularly in automation and sustainable practices. Notably, a major technological acquisition has enabled a traditional manufacturing firm to leverage advanced analytics, thus enhancing supply chain visibility and optimization.

These movements indicate a market increasingly interdependent, with providers competing to form strategic partnerships to navigate complex supply chain challenges. As the life science manufacturing sector adapts to these market realities, providers' strategic positioning will continue to play a critical role in shaping overall industry dynamics.

From the 40 companies assessed for this study, 30 qualified for this quadrant, with 11 being Leaders and one Rising Star.

accenture

Accenture's digital-first approach in lifescience manufacturing drives operational efficiency, agility and sustainability, positioning clients to thrive in a rapidly evolving global market.

Capgemini

Capgemini excels in life sciences manufacturing supply chains by leveraging the Intelligent Production System™ to drive efficiency, innovation and compliance through advanced technologies and lean methodologies, achieving better drug development and delivery performance.

cognizant

Cognizant excels with AI and ML integration, real-time analytics and tailored platforms such as cell and gene therapy orchestration, enhancing life sciences operations. Strong partnerships boost credibility, paving the way for seamless adoption.

Deloitte.

Deloitte excels in transforming manufacturing supply chains through holistic, data-driven strategies, fostering efficiency and accessibility, strong partnerships and deep industry knowledge to deliver tailored solutions that optimize operations.

Genpact is enhancing its life sciences manufacturing supply chain by expanding into midmarket segments, leveraging innovation centers, strategic partnerships and talent development to deliver comprehensive solutions for major pharma clients.

HCLTech

HCLTech excels in transforming life sciences manufacturing and supply chains through innovative, scalable solutions, integrating AI and GenAI for enhanced efficiency and compliance. Its commitment to a customer-centric approach positions it as a leader in the industry.

Infosys

Infosys is pivotal in delivering innovative, end-to-end solutions that integrate advanced technologies. Its focus on tailored methodologies and regulatory compliance enhances operational efficiencies, positioning it as a trusted partner for transformation.

LTIMindtree excels in life sciences manufacturing and supply chain by integrating advanced IT/OT solutions, leveraging AI for predictive analytics and ensuring compliance with regulatory standards. Its unique position combines deep industry expertise with innovative digital capabilities for end-to-end optimization.

NTT DATA is a key player in the life sciences manufacturing, utilizing SAP support, innovative factory solutions and a GxP-compliant data fabric. Its use of digital twins and AI drives operational efficiency, while strategic mergers strengthen its supply chain capabilities.

TCS stands out in life sciences with innovative digital solutions and strong partnerships. Its commitment to sustainability and Industry 4.0 principles boosts supply chain efficiency and promotes agile manufacturing practices, positioning it as a leader in the sector.

Wipro is pivotal in the life sciences manufacturing supply chain. It leverages innovative technologies such as AI and analytics to enhance supply chain operations' efficiency, compliance and sustainability, ensuring a competitive edge.

Tech Mahindra (Rising Star) leads in the life sciences the manufacturing supply chain space with robust digital solutions that boost efficiency, enhance visibility and enable real-time management. It leverages emerging technologies to drive innovation and strategic growth.

Leader

"LTIMindtree seamlessly uses IT and OT to transform manufacturing supply chains in life sciences with innovative solutions that drive efficiency and compliance."

Sneha Jayanth

LTIMindtree

Overview

LTIMindtree is headquartered in Mumbai, India. It has more than 84,000+ employees across over 40 countries. In FY25, the company generated $4.5 billion in revenue. LTIMindtree takes a holistic lifecycle approach in life sciences manufacturing, extending its focus beyond production lines to encompass key performance indicators, real-time monitoring, asset utilization, predictive maintenance, productivity, safety, supply chain visibility and material traceability. Leveraging AI, they optimize end-to-end operations, mitigate supply chain risks, align manufacturing with predictive market behavior and ensure compliance with quality and regulatory standards such as GxP.

Strengths

Integrated IT and OT expertise: LTIMindtree combines OT with IT to offer end-to-end lifecycle management. This unique capability ensures seamless integration of production systems, ERP, Manufacturing Execution System (MES)and Quality Management System (QMS), delivering optimal operational efficiency and compliance.

Advanced analytics and predictive capabilities: Through its Inxt platform, LTIMindtree utilizes AI and ML for real-time analytics and predictive maintenance, empowering clients to preempt equipment failures, optimize supply chain logistics and enhance visibility across operations.

Holistic digital transformation: With a complete lifecycle view, LTIMindtree focuses on production and key performance indicators, asset utilization, supply chain visibility and compliance optimization. This comprehensive approach enables organizations to align manufacturing with market demands and ensure regulatory adherence.

Proprietary solutions and intellectual property: LTIMindtree stands out with its proprietary tools, such as the iNext platform, enabling custom industrial IoT (IioT) and Industry 4.0 solutions that drive actionable insights and enhance manufacturing efficiency.

Caution

LTIMindtree should enhance its market penetration and brand visibility by showcasing its smart manufacturing solutions. Emphasizing customized industry solutions coupled with operational excellence and regulatory compliance, it can attract clients and reinforce its commitment to excellence.

Appendix

The ISG Provider Lens 2025 – 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.

Study Sponsor:
Iain Fisher

Lead Author:
Rohan Sinha

Editor:
Indrani Raha

Co-Author and Research Analyst:
Sneha Jayanth

Data Analyst:
Rajesh MC

Consultant Advisors:
Jenn Stein, Michael Fullwood, and Randy Tucker

Project Manager:
Sonam Khanna

Information Services Group Inc. is solely responsible for the content of this report. Unless otherwise cited, all content, including illustrations, research, conclusions, assertions and positions contained in this report were developed by, and are the sole property of Information Services Group Inc.

The research and analysis presented in this study will include data 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. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

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

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/ vendors 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 and experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts and figures received from providers and other sources.
6. Use of the following main 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
Lead 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.

Rohan currently is a Principal Analyst at ISG where his role includes handling IPL reports related to the healthcare and life sciences domains.

Co-Author and Research Analyst

Sneha Jayanth
Research Analyst

Sneha Jayanth is a senior research analyst at ISG and is responsible for supporting and co-authoring ISG Provider Lens™ studies on Healthcare, Procurement service and platform, FAO and other custom research. She has six years of experience conducting ICT related research and writing thought leadership content within various industries. In her previous role, she handled market analysis, and market intelligence and authored reports focusing on the latest technologies like IoT, AI, cloud, and blockchain. She has also worked in a thought leadership division in the ICT industry managing blogs, reports, whitepapers, and case studies.

She is responsible for writing enterprise content and the global summary report, which includes market trends and insights relevant to the border customer landscape.

Study Sponsor

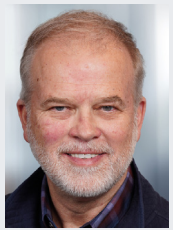
Iain Fisher

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 analysing 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/ISG Research

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, while 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.

ISG Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: Public Sector.

For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +1.203.454.3900, or visit research.isg-one.com.

ISG

ISG (Nasdaq: III) is a global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth.

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.

For more information, visit isg-one.com.

ISG Provider Lens™

JUNE, 2025

REPORT: LIFE SCIENCES DIGITAL SERVICES 2025