ISG Provider Lens™

Life Sciences Digital Services

Clinical Development (Service Providers)

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

Customized report courtesy of:

LTIMindtree

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Executive Summary

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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

	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

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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

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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

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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

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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

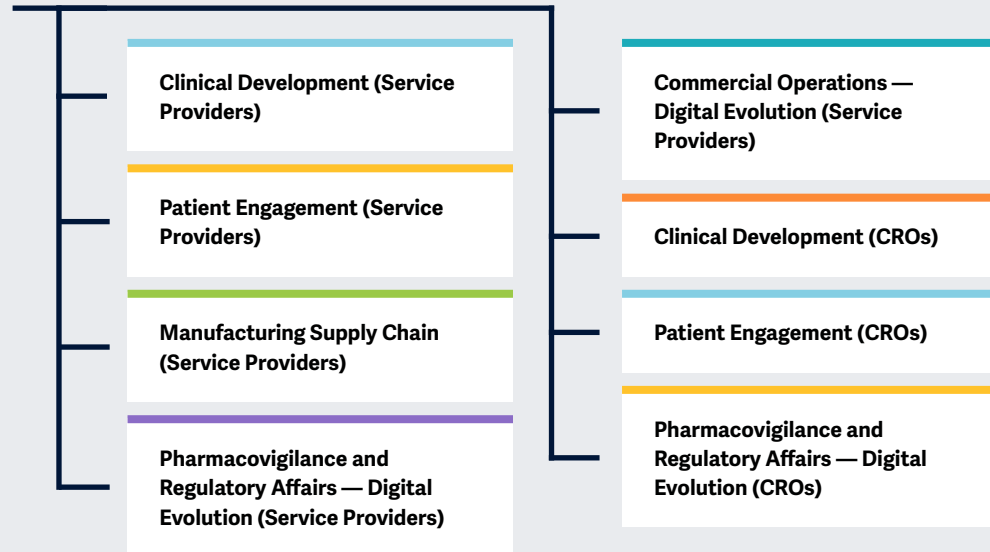|	Clinical Development (Service Providers)	Patient Engagement (Service Providers)	Manufacturing Supply Chain (Service Providers)	Pharmacovigilance and Regulatory Affairs - Digital Evolution (Service Providers)	Commercial Operations - Digital Evolution (Service Providers)	Clinical Development (CROs)	Patient 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

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	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

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)

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.

★ **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.

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.

Clinical Development
(Service Providers)

This report is valuable for providers offering **clinical development** 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 clinical development.

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.
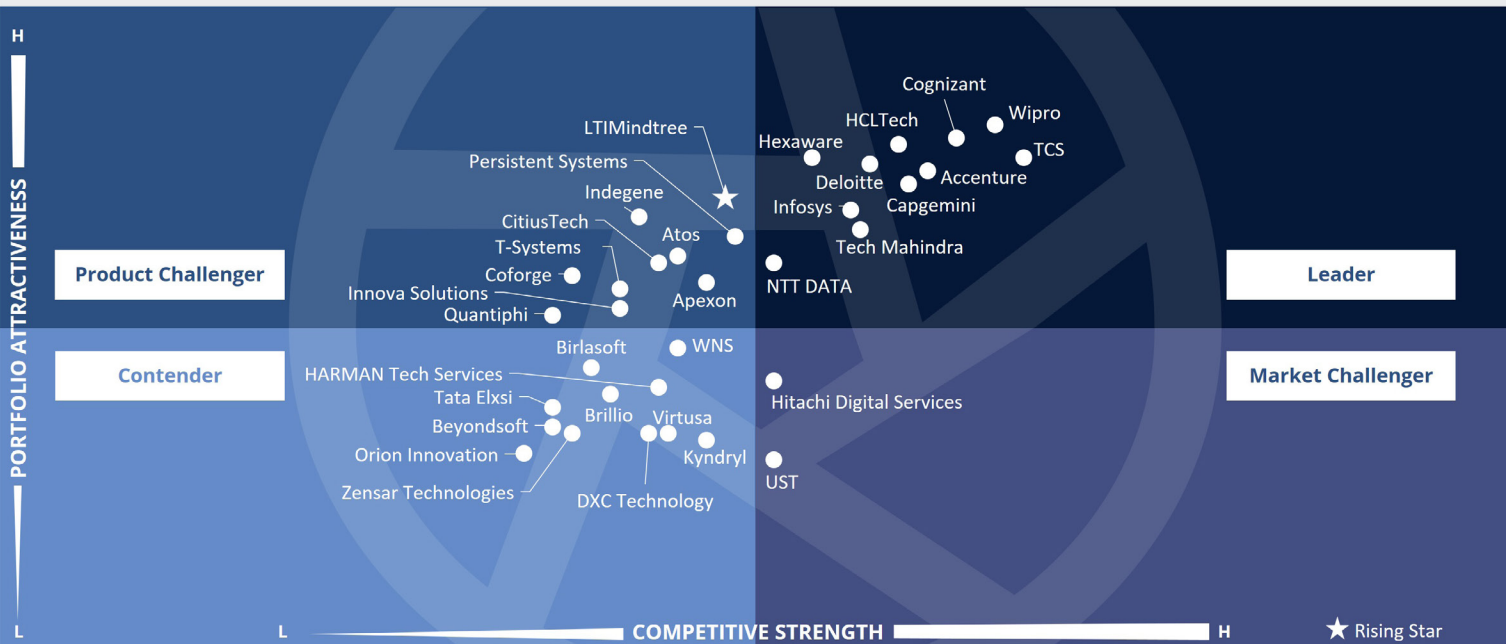
Industry practitioners

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.

ISG Provider Lens™

Source: ISG RESEARCH

Life Sciences Digital Services
Clinical Development (Service Providers)

Global 2025

H

PORTFOLIO ATTRACTIVENESS

Product Challenger

Contender

LTIMindtree

Persistent Systems

Indegene

CitiusTech

T-Systems

Innova Solutions

Coforge

Quantiphi

Birlasoft

WNS

HARMAN Tech Services

Tata Elxsi

Beyondsoft

Brillio

Virtusa

Orion Innovation

Kyndryl

Zensar Technologies

DXC Technology

Atos

Apexon

Hexaware

Cognizant

HCLTech

Wipro

TCS

Deloitte

Accenture

Infosys

Capgemini

Tech Mahindra

NTT DATA

Leader

Market Challenger

Hitachi Digital Services

UST

L

L

COMPETITIVE STRENGTH

H

★ Rising Star

This quadrant assesses clinical development service providers on their **AI-driven innovation, data integration** and **patient-centric platforms**, focusing on how they enhance **trial efficiency, compliance** and **speed to market**.

Rohan Sinha

Clinical Development (Service Providers)

Definition

This quadrant evaluates service providers' capabilities in supporting life science companies through all clinical phases. High costs and substantial failure rates in clinical trials have propelled the need for continuous innovation and services to enhance efficiency. Thus, integrating technology has become crucial to addressing these challenges spanning areas s patient recruitment, data collection, monitoring, analysis and regulatory compliance. Using innovations such as AI, big data analytics, mobile health applications and electronic health records also plays a key role in the comprehensive and strategic clinical development within digital transformation. Digital solutions aid in patient identification and safety monitoring, improve treatment efficacy and regulatory compliance, and build a robust foundation for maintaining quality standards and meeting reporting requirements.

Life science companies are embracing this digital transformation and recognizing the vital role of technology in driving efficient, innovative and successful drug development.

Eligibility Criteria

1. Proficiency in aiding the implementation and support of clinical trial and/or **clinical data and analytics technology solutions**

2. Knowledge of **clinical trial processes and requirements** with demonstrated experience in providing technology support

3. Expertise in using technology solutions in **clinical development**

4. Ability to offer alternatives to in-person interactions for researchers and participants, such as **mobile and internet-connected capabilities**

5. Established or emerging **partnerships with clinical development** technology and consulting firms

6. Capability to support, integrate and **modernize legacy systems**

7. Competencies in developing plans for **deploying appropriate technologies and procedures**

8. Ability to support, scale and update **technology tools and platforms**

Observations

The clinical development services landscape is evolving rapidly, marked by a strong push toward digitalization, AI integration and patient-centric trial models. A clear trend is the adoption of intelligent platforms and automation to streamline traditionally manual, time-consuming processes — ranging from patient recruitment and protocol design to site monitoring and documentation. Robust data platforms harness real-world evidence more effectively, enabling enhanced trial design, rapid decision-making and substantial regulatory alignment.

Service providers are investing in AI for predictive analytics, synthetic control arms and risk-based monitoring, aiming to improve trial success rates and reduce time to market. Many are building proprietary platforms to support unified clinical trial management, integrating data capture, electronic health records (EHRs), remote monitoring and analytics. There is also increased emphasis on decentralized and site less trials to expand patient reach and engagement, supported by IoT and virtual visit capabilities.

Overall, the quadrant reflects a maturing ecosystem where innovation is balanced with scalability and compliance. While some solutions are still in the minimum viable product (MVP) or PoC stages, the trajectory points toward a future where digital-first, AI-enhanced clinical development is the norm, enabling more efficient, accurate and inclusive trials across the drug development lifecycle.

From the 40 companies assessed for this study, 34 qualified for this quadrant, with 11 being Leaders and one Rising Star.

accenture

Accenture combines deep industry expertise with its INTIENT platform to deliver end-to-end clinical services. It drives efficiency, innovation and patient-centricity across clinical development, from real-time trial insights to digital and siteless trial solutions.

Capgemini

Capgemini's acquisition of Syniti strengthens its data-driven digital transformation, streamlining clinical trials for efficiency and cost savings. Its Its Generative AI(GenAI) Lab advances sustainable AI, boosting patient engagement and supporting real-time decision-making.

cognizant

Cognizant is a trusted adviser in clinical development, enhancing patient engagement with tailored protocols. Its Single Investigator Portal (SIP) enables real-time communication, while the document accelerator streamlines and ensures high-quality documentation.

Deloitte.

Deloitte leverages AI, real-world evidence and digital innovation to transform clinical development. Streamlining trial processes, enhancing data-driven insights and enabling scalable digital solutions, Deloitte helps life sciences firms drive rapid outcomes.

HCLTech

HCLTech drives clinical development with real-time reporting, seamless data integration and AI solutions. Using predictive analytics and blockchain, HCLTech boosts patient engagement, streamlines trials, optimizes site selection and ensures compliance.

HEXAWARE

Hexaware's Clinical Data Automation uses agentic AI to streamline clinical data processes. It's Medical Writing as a Service (MWaaS) efficiently creates regulatory documents, while Quality Compliance as a Service (QCaaS) ensures thorough submission, validation and compliance.

Infosys

Infosys speeds up clinical development with AI-powered platforms for patient engagement, trial optimization, and automated writing. Its risk-based monitoring, drug repurposing, and Kaleidoscope Insight ensure secure, efficient, and compliant execution.

NTT DaTa

NTT DATA's RWE platform boostsdecision-making with vast health-related data, offering synthetic control arms and trial solutions to speed up timelines. It expands RWE quality-checking across therapeutic areas, providing full-stack support in clinical development.

Clinical Development (Service Providers)

TCS' ADD™ platform streamlines clinical development across various areas, enhancing data interoperability. This scalable, user-friendly solution utilizes AI-driven insights to optimize decision-making and improve patient outcomes.

Tech Mahindra's Advanced Clinical Platform streamlines trials with digital workflows and task automation. Its multichannel approach enhances patient engagement, while AI and blockchain integration accelerate outcomes and ensure data integrity.

Wipro accelerates clinical development with AI-driven patient recruitment, predictive analytics and the DICE platform for unified trial management. Its future-ready lab solutions integrate AI and IoT to enhance research, trial efficiency and patient outcomes.

LTIMindtree's (Rising Star) Decentralized Clinical Trials (DCT) solution streamlines patient recruitment and data capture, using AI for real-time risk assessment and Monte Carlo simulations to maintain oversight and quickly identify compliance issues.

LTIMindtree

"LTI Mindtree transforms clinical development through innovative solutions and advanced technologies, enhancing patient engagement and operational efficiency to deliver timely, high-quality outcomes in clinical trials."

Rohan Sinha

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 brings AI-driven innovation to life sciences with contextual copilots and predictive analytics that reduce clinical trial failures and enhance PV. Its Fabric and Expert AI frameworks enable scalable, efficient handling of complex, unstructured data. The company's agentic AI solutions are designed to drive both operational efficiency and strategic decision-making across the clinical value chain.

Strengths

Robust decentralized clinical trials solutions: It provides an integrated Decentralized Clinical Trials (DCT) solution that enhances patient, researcher and clinical experience. This solution streamlines patient recruitment and enables longitudinal data capture with features such as eConsent, patient dashboards and remote monitoring. Integrating data from connected devices and wearables enhances trial accessibility and engagement, supporting trial managers with prescreening and referral-tracking tools.

Advanced AI and risk management capabilities: Leveraging AI, it boosts clinical trial efficiency with real-time risk assessment, reducing time to market. Monte Carlo simulations forecast timelines, costs and budgets, while standardized benchmarks and an AI-powered Project Analyzer enable milestone tracking. This proactive resource allocation mitigates risks, ensuring the timely completion of trials.

Integrated digital command center: LTIMindtree's Digital Command Center offers centralized oversight of trial activities through digital dashboards, providing real-time visibility into operations. This view enhances decision-making and facilitates swift responses to challenges. Additionally, AI-driven anomaly detection swiftly identifies issues in clinical data, ensuring compliance and maintaining quality throughout the trial lifecycle.

Caution

While LTIMindtree's DCT and AI solutions improve efficiency, overreliance on automation may lead to data overload, algorithm bias, and reduced adaptability, highlighting the need for ongoing human oversight.

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.

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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

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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.

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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.

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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.

About Our Company & Research

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.

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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.

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ISG Provider Lens™

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