

Life Sciences Digital Services

A research report comparing
provider strengths, challenges
and competitive differentiators

QUADRANT REPORT | JUNE 2024 | GLOBAL

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Life sciences' embrace of decentralized trials and digital innovations transforms patient care

Embracing decentralized trials in life sciences

The clinical trials landscape is undergoing a significant transformation with the rise of decentralized trial methodologies. A growing recognition of the limitations of traditional trial approaches, such as centralized site-based monitoring and patient visits, drives this shift. Decentralized trials offer a promising alternative by leveraging digital technologies to conduct certain trial activities remotely, including patient recruitment, consent, data collection and monitoring. This approach enhances patient convenience and participation and enables real-time data collection and analysis, leading to more efficient and cost-effective trials.

The interest in decentralized trials has surged across the industry, with pharmaceutical

companies, contract research organizations (CROs), technology providers and regulatory agencies actively exploring and adopting these innovative methodologies. Advancements in telemedicine, wearable devices, mobile applications and electronic health records have paved the way for decentralized trial implementation, enabling seamless remote interactions between patients and investigators.

However, despite their promise, decentralized trials also present unique challenges and considerations. The key challenges stakeholders face are ensuring data privacy and security, maintaining regulatory compliance, and overcoming digital literacy barriers among specific patient populations. Integrating decentralized trial data with existing clinical trial infrastructures and workflows requires careful planning and coordination.

The growing presence of AR and VR in clinical development

As AR and VR technologies become increasingly accessible, they are reshaping the trajectory of clinical development. These immersive digital tools are now

Digital transformation
is the **integration**
of technology and
innovation that
reshapes the future.



widely integrated across diverse provider landscapes, transforming traditional trial methodologies and participant engagements. Stakeholders are leveraging AR and VR to pioneer innovative approaches to patient education, training and participation in clinical trials. By immersing participants in trial protocols, these technologies enhance comprehension and adherence. Furthermore, AR and VR facilitate remote site visits, enabling seamless interactions between investigators and participants regardless of geographical barriers. They also allow intuitive data visualization, empowering stakeholders to analyze and interpret trial data effectively. This transformative shift highlights a broader trend toward digital transformation in clinical research, emphasizing personalized and engaging experiences. As providers continue to harness AR and VR to enhance trial operations, clinical development evolves toward greater efficiency, accessibility and participant centricity.

Rising focus on patient-centric approaches

A key trend in the life sciences industry is the growing emphasis on patient-centric

approaches across various drug development and healthcare delivery aspects. Stakeholders in the industry are actively prioritizing patient engagement and involvement, recognizing patients' crucial role in shaping research, clinical trials and treatment outcomes. This trend is evident in adopting patient-centered research methodologies, integrating patient-reported outcomes in clinical trials, and developing therapies tailored to individual patient needs. Pharmaceutical companies, research institutions and healthcare providers are increasingly collaborating with patients, advocacy groups and communities to ensure that products and services address patients' unique needs and preferences. As a result, patient centricity has become a central tenet of the industry's efforts to drive innovation, improve healthcare outcomes and enhance the overall patient experience.

Service providers offer various capabilities to support these initiatives in response to the industry's shift toward patient-centric approaches. These include advanced remote patient monitoring technologies and telemedicine, enabling more convenient and

accessible healthcare delivery. Providers are also developing patient engagement platforms and tools that facilitate communication between patients and healthcare professionals (HCPs), empower patients to take an active role in their care and capture real-time feedback to inform decision-making. Furthermore, service providers offer expertise in data analytics and personalized medicine to help organizations better understand patient needs, preferences and behaviors, enabling more targeted and effective interventions. By offering these capabilities, service providers are vital in helping life sciences companies and healthcare organizations enhance patient engagement and deliver more patient-centered care.

Technology's impact on pharmacovigilance and regulation

The integration of advanced technologies like AI, automation, and natural language processing (NLP) is fundamentally altering the landscape of pharmacovigilance (PV) and regulatory affairs (RA). These technological advancements enable various RA and PV processes to be automated, including case intake, adverse event reporting and regulatory

compliance management. By harnessing AI algorithms, companies can rapidly analyze large datasets, identify potential risks and expedite decision-making processes crucial for drug safety assessment and regulatory compliance. Moreover, these technologies facilitate real-time monitoring, enabling prompt responses to emerging regulatory requirements and enhancing overall efficiency throughout the regulatory lifecycle. This technology-driven transformation is poised to significantly improve the effectiveness of pharmacovigilance and regulatory affairs practices, leading to safer and more transparent healthcare outcomes for patients globally.

Holistic regulatory support and collaboration

A notable trend in pharmacovigilance and regulatory affairs is the shift toward providing comprehensive end-to-end regulatory support and fostering strategic collaborations across the pharmaceutical industry. Companies increasingly recognize the importance of partnering with technology leaders, academic institutions and regulatory agencies to navigate the complex regulatory landscape effectively. These collaborations aim to offer



tailored solutions aligned with global regulatory standards, ensuring seamless assistance throughout the regulatory journey, from initial submissions to ongoing lifecycle management. By providing holistic regulatory support, companies enhance compliance efforts, drive value generation and foster confidence in regulatory processes. This collaborative approach facilitates the exchange of knowledge, best practices and resources, ultimately enabling pharmaceutical enterprises to navigate regulatory challenges more efficiently and deliver safer and more effective healthcare products to market.

Redefining commercial strategies in life sciences

The life sciences industries are amid a profound transformation, compelling a fundamental reevaluation of commercial strategies to ensure sustained competitiveness and success. Recent breakthroughs in science and medicine have ushered in significant growth and improved patient outcomes, highlighting the imperative to realign commercial approaches with evolving industry dynamics. Essential to this recalibration is the investment in fair,

accessible and cost-effective commercial strategies, bolstered by judicious talent acquisition and financial decision-making.

Traditional paradigms such as product leadership and cost efficiency are no longer sufficient for achieving commercial excellence in this new landscape. Success now hinges on agile decision-making powered by automated analytics, growth propelled by microsegmentation and personalized offerings, and innovative service delivery facilitated through interconnected platforms. Providers strategically embrace advanced technologies like AI, analytics and automation to deliver tailored solutions and profound insights. Providers actively nurture loyalty and engagement by prioritizing customer preferences and fostering hyperpersonalized experiences while driving positive health outcomes in an increasingly patient-centric environment.

Evolution of global life sciences supply chains

In response to the evolving socio-political-economic landscapes, the global life sciences supply chain has undergone


a significant transformation, marked by resilience, digitalization, interconnectivity and sustainability. This transformation has elevated the role of supply chain management, moving it from a peripheral concern to a central focus within corporate agendas. Executives increasingly recognize the importance of sustainability initiatives in life sciences manufacturing supply chains, driving efforts to optimize resource usage, reduce emissions and enhance environmental responsibility through the strategic deployment of technologies such as analytics, AI and IoT.

Industry 4.0 and digitalization have played pivotal roles in reshaping the life sciences supply chain landscape, introducing unprecedented levels of efficiency and innovation. The integration of advanced technologies enables companies to optimize supply chain operations through real-time monitoring of production processes, predictive equipment maintenance and enhanced inventory management. This digital transformation fosters greater visibility and transparency across the supply chain, facilitating seamless collaboration with

partners and ensuring compliance with regulatory requirements. Moreover, end-to-end visibility is essential for ensuring product quality, regulatory compliance and supply chain resilience, with digital technologies empowering providers to offer real-time feedback, proactively resolve bottlenecks and disruptions, and optimize supply chain processes for sustainable growth.


The digital revolution sweeping the life sciences industry marks a significant transition, with organizations harnessing different technologies to elevate research, development and healthcare delivery. This paradigm shift encompasses a spectrum of innovations, from harnessing big data analytics and AI to integrating ML algorithms and IoT devices.



 Provider Positioning

	Clinical Development	Patient Engagement	Manufacturing Supply Chain	Pharmacovigilance and Regulatory Affairs – Digital Evolution	Commercial Operations – Digital Evolution
Accenture	Leader	Leader	Leader	Leader	Leader
Apexon	Product Challenger	Contender	Not In	Not In	Not In
Beyondsoft	Contender	Contender	Not In	Contender	Contender
Birlasoft	Not In	Not In	Product Challenger	Not In	Product Challenger
Brillio	Contender	Contender	Contender	Not In	Contender
Capgemini	Leader	Leader	Leader	Leader	Leader
Charles River Laboratories	Contender	Not In	Not In	Contender	Not In
Cigniti	Contender	Contender	Contender	Contender	Not In
Cognizant	Leader	Leader	Leader	Leader	Leader
Conduent	Not In	Product Challenger	Not In	Not In	Not In



 Provider Positioning

	Clinical Development	Patient Engagement	Manufacturing Supply Chain	Pharmacovigilance and Regulatory Affairs – Digital Evolution	Commercial Operations – Digital Evolution
Deloitte	Leader	Leader	Leader	Leader	Leader
DXC Technology	Contender	Contender	Not In	Contender	Not In
Eviden (an Atos Business)	Product Challenger	Product Challenger	Product Challenger	Not In	Not In
Fortrea	Product Challenger	Product Challenger	Not In	Product Challenger	Not In
Genpact	Not In	Product Challenger	Leader	Market Challenger	Leader
HARMAN	Contender	Market Challenger	Market Challenger	Contender	Market Challenger
HCLTech	Leader	Leader	Leader	Leader	Leader
Hexaware	Leader	Leader	Product Challenger	Not In	Rising Star ★
Hitachi Digital Services	Contender	Not In	Not In	Not In	Not In
ICON	Product Challenger	Product Challenger	Not In	Product Challenger	Not In




Provider Positioning

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	Clinical Development	Patient Engagement	Manufacturing Supply Chain	Pharmacovigilance and Regulatory Affairs – Digital Evolution	Commercial Operations – Digital Evolution
Indegene	Product Challenger	Product Challenger	Product Challenger	Rising Star ★	Leader
Infosys	Leader	Leader	Leader	Leader	Leader
IQVIA	Product Challenger	Leader	Not In	Product Challenger	Not In
Kyndryl	Market Challenger	Market Challenger	Market Challenger	Market Challenger	Market Challenger
LTIMindtree	Product Challenger	Product Challenger	Leader	Contender	Product Challenger
Marlabs	Contender	Contender	Contender	Product Challenger	Contender
NTT DATA	Product Challenger	Product Challenger	Product Challenger	Not In	Not In
Orion Innovation	Contender	Contender	Not In	Contender	Contender
Parexel	Product Challenger	Product Challenger	Not In	Product Challenger	Not In
Persistent Systems	Rising Star ★	Product Challenger	Product Challenger	Market Challenger	Not In



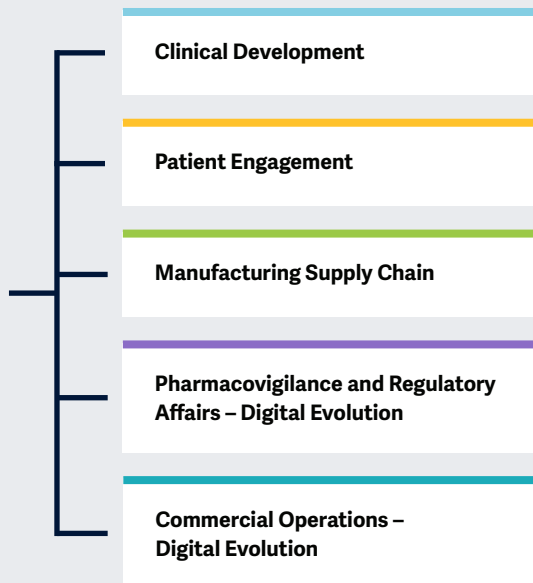
 Provider Positioning

	Clinical Development	Patient Engagement	Manufacturing Supply Chain	Pharmacovigilance and Regulatory Affairs – Digital Evolution	Commercial Operations – Digital Evolution
PPD	Leader	Leader	Not In	Leader	Not In
Stefanini	Not In	Product Challenger	Contender	Not In	Not In
Syneos Health	Product Challenger	Product Challenger	Not In	Product Challenger	Not In
TCS	Leader	Leader	Leader	Leader	Leader
Tech Mahindra	Leader	Rising Star ★	Rising Star ★	Market Challenger	Leader
Virtusa	Contender	Not In	Not In	Not In	Not In
Wipro	Leader	Leader	Leader	Leader	Not In
WNS	Contender	Contender	Contender	Contender	Product Challenger
Zensar Technologies	Contender	Product Challenger	Contender	Contender	Contender



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

Simplified Illustration Source: ISG 2024



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 their seamless integration into ongoing processes faces challenges due to issues with low-quality, outdated and incomplete data. The industry grapples with data-centricity challenges in R&D, emphasizing the significance 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, but there is a need to adopt it, 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 sources of innovation, a patient-centric approach and creative strategies for monetizing non-traditional revenue sources. In this evolution, digital transformation emerges as the backbone of solutions, with enhanced connectivity, mobile engagement and advanced analytics becoming operational necessities 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 five quadrants for services/solutions: Clinical Development; Patient Engagement; Manufacturing Supply Chain; Pharmacovigilance and Regulatory Affairs — Digital Evolution; and Commercial Operations — Digital Evolution.

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

Our 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 (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.

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.

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.

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

Who Should Read This Section

This report is relevant to enterprises across industries and regions for evaluating providers of digital transformation services around clinical development.

In this quadrant, ISG highlights the current market positioning of service providers that offer digital transformation services in the global clinical development space.

The latest advanced technologies and digital capabilities, combined with new science and innovative approaches to traditional processes, are changing how clinical development creates new, life-changing treatments for patients.

From advancing the next generation of clinical operating models to harnessing the digital revolution through data and devices, professionals with expertise across strategy, consulting, technology, digital and operations are supporting clients as they work to accelerate their clinical development programs. Top providers in the global life sciences market help clients improve or manage operations for their clinical development functions.

The emergence of generative AI (GenAI) is transforming the landscape for life sciences providers and enterprises, unlocking exponential revenue opportunities and instilling renewed hope among patients.

Enterprises and providers are poised to pave the way for innovations and quicker cures at the opportune moment. By harnessing the power of data, they can develop patient-centered solutions that truly make a difference.



Digital professionals should read this report to understand providers' capabilities and positioning, which will help them select appropriate digital services and solutions related to clinical development.



Technology professionals should read this report to understand the leading technologies, areas of investment, challenges faced by digital innovators and the key factors to achieving long-term success.

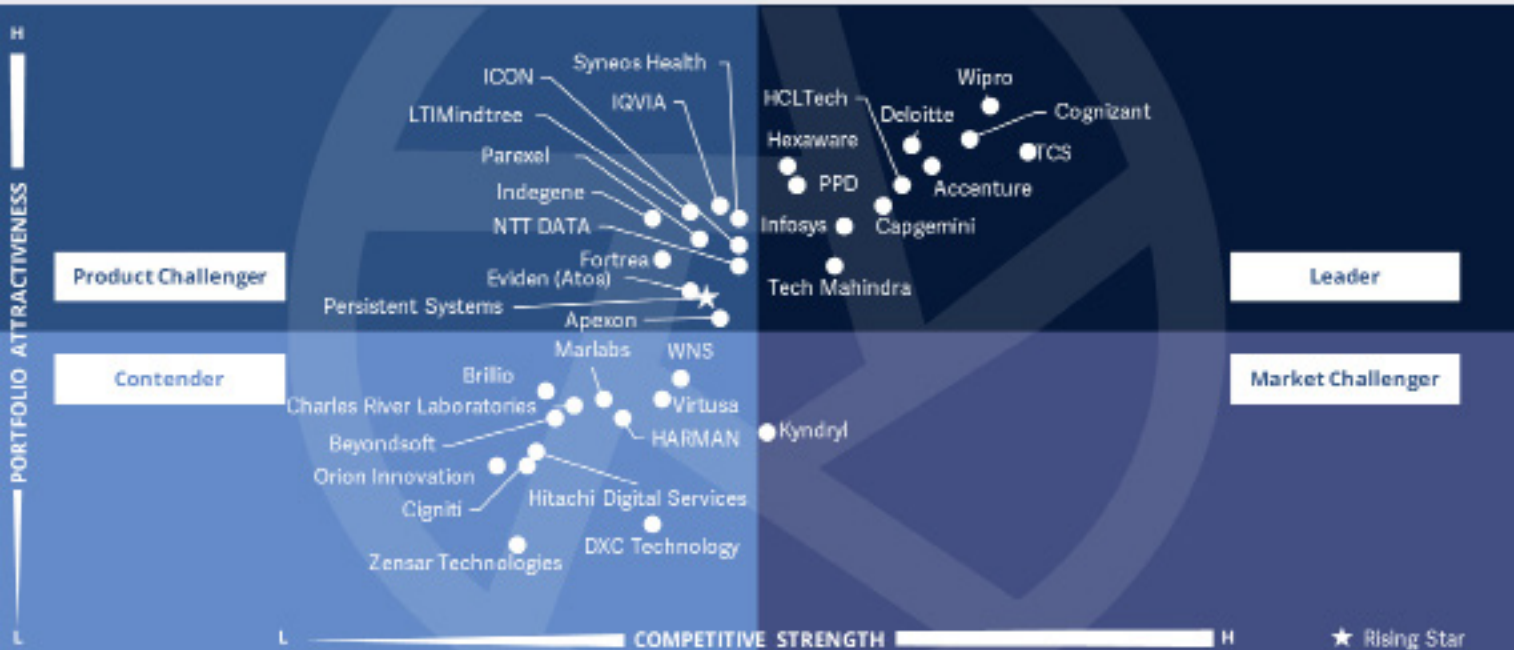


Industry practitioners should read this report to better understand end-user solutions and create business models that help maximize CX and create value for key healthcare stakeholders.



Cybersecurity professionals should read this report to understand how providers address significant compliance and security challenges while maintaining a seamless experience for end users.





This quadrant highlights **digital solutions** tailored for clinical development. Leaders showcased **innovation** across various functions, **integrating study design, data, operational metrics and reporting**, demonstrating technical and **subject matter expertise**.

Rohan Sinha



Clinical Development

Definition

This quadrant evaluates the capabilities of service providers supporting life sciences companies through all clinical phases. The challenges of high costs and substantial failure rates in clinical trials necessitate continuous innovation and services to enhance efficiency. Technology is crucial for addressing these challenges, encompassing patient recruitment, data collection, monitoring, analysis and regulatory compliance. Integrating innovations such as AI, big data analytics, mobile health applications and electronic health records plays a pivotal role in the comprehensive and strategic clinical development within digital transformation. Life sciences companies, navigating the complexities of all clinical phases, confront the daunting expenses and elevated failure rates inherent in clinical trials. They actively seek innovative solutions that can improve efficiency and mitigate risks to overcome these challenges. Digital solutions aid in patient identification, safety monitoring, treatment efficacy and regulatory compliance and

establish a robust foundation for maintaining quality standards, meeting reporting requirements and navigating regulatory intelligence effectively.

Embracing this transformative digital landscape, life sciences companies recognize the vital role of technology in shaping the future of efficient, innovative and successful drug development endeavors. Technology's intersection with clinical development is crucial for advancements within the healthcare industry.

Eligibility Criteria

1. Demonstrate 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 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**



Clinical Development

Observations

In today's dynamic clinical development landscape, providers are leading the charge in revolutionizing trial methodologies and approaches across industries. Armed with advanced technologies and strategic consulting services, these entities are reshaping the clinical trial paradigm. By harnessing the power of advanced analytics, AI and automation, they're streamlining trial operations, optimizing patient recruitment and ensuring data integrity. Moreover, their focus on decentralized trials and virtual engagement strategies underscores a broader commitment to enhancing trial efficiency and patient centricity. As the industry continues to evolve, these providers stand at the forefront, driving innovation and shaping the future of clinical research.

Furthermore, service providers offer a holistic suite of services encompassing protocol development, patient recruitment and engagement, real-time data monitoring and regulatory compliance. Their collaborative

approach and deep domain expertise enable sponsors and contract research organizations to navigate complex challenges and accelerate trial timelines. Their commitment to continuous improvement and innovation ensures they remain agile and adaptive in an ever-changing regulatory landscape.

From the 40 companies assessed for this study, 35 qualified for this quadrant, with 11 being Leaders and one a Rising Star.



Accenture streamlines clinical development with its INTIENT™ platform, enhancing trials through data insights and digital support. Strategic investments like QuantHealth drive innovation, cut costs and advance trial methodologies.



Capgemini ensures efficient trial execution by proactively monitoring operations, streamlining post-trial data analysis and providing robust data foundations for protocol design and synthetic trials.



Cognizant excels in clinical trial automation, optimizing workflows for efficiency. Its strategic consulting designs protocols, tailors approaches and develops innovative platforms for clients.



Deloitte's clinical development suites, R&D Connect and MyPath, optimize trial management and boost patient engagement. Its advanced analytics and CognitiveSpark integration accelerate therapy development by efficiently automating insights and data management.



HCLTech provides comprehensive eClinical solutions covering trial implementation, lab data management and decentralized trials. Its partnerships with industry leaders drive innovative solutions, enhancing trial efficiency and patient engagement.



Clinical Development



Hexaware's clinical solutions include a decentralized trials platform, clinical process automation and data as a service. These offerings streamline trial management with advanced technology and support, enhancing efficiency and accelerating drug development.



Infosys provides diverse clinical solutions and excels in decentralized trials, digital labs and trial supplies management. Its expertise includes automating safety narratives, structuring content and analyzing real-world evidence data.



PPD emphasizes accuracy with real-time data systems and robust validations. It provides advanced disease simulation and decentralized trial options for efficient, safe participation.



TCS provides advanced clinical analytics for decentralized trials and a transformative ADD™ platform, streamlining the industry. With a focus on AI, TCS pioneers innovative solutions, driving efficiency and insights across sectors.



Tech Mahindra provides integrated clinical solutions like study management and patient engagement. Its platform supports the entire study lifecycle with user-friendly interfaces, advanced analytics and efficient scheduling for enhanced efficiency.



Wipro optimizes trial planning with analytics, enhances precision with Digital Biomarker Integration and revolutionizes safety with the DICE Platform, integrating data capture and virtual visits.



Persistent Systems (Rising Star) provides efficient clinical trial and data management solutions, ensuring compliance and data integrity. Its GenAI innovations optimize trials, while streamlined study management enhances site operations and patient engagement.





“Capgemini pioneers transformative solutions in clinical development, advancing trial methodologies.”

Rohan Sinha

Capgemini

Overview

Capgemini is headquartered in Paris, France. It has more than 340,000 employees worldwide. In FY23 the company generated €22.5 billion in revenue, with Applications and Technology as its largest segment. The company supports clients across the entire clinical development lifecycle. Its expertise ensures streamlined operations, accelerated insights and improved patient outcomes. With a holistic approach encompassing trial monitoring, data analysis and protocol optimization, the company optimizes processes to deliver efficient and impactful solutions.

Strengths

Innovative clinical trial optimization:

Capgemini successfully redesigns protocols using data-driven insights and GenAI technology. Its expertise extends to portfolio management, enabling clients to simulate long-term budgeting and automate processes. Experienced in hybrid trials, the company has remote patient monitoring for increased diversity and reduced dropouts, ensuring safer, more accessible trials.

Accelerating operations with technology:

Capgemini leverages agile strategies and advanced technologies to enhance efficiency. A focus on leveraging clinical data and AI helps clients stay ahead while managing potential risks. Its expertise in optimizing clinical processes through data-driven approaches also enables significant time and

resource savings. By utilizing AI for patient identification and collaborating with high-performing sites, the company efficiently automates protocol analysis and identifies top-tier healthcare providers.

Trial execution efficiency: Capgemini proactively monitors trials, ensuring efficient operations from patient recruitment to supply chain management. It streamlines post-trial data preparation and analysis with automated processes and GenAI. The company also provides robust data foundations, aiding in protocol design and implementation of synthetic trials.

Caution

Clients should be aware of potential challenges in managing the complexity of trial operations, data analysis and protocol optimization. Effective communication, diligent project management and a clear understanding of regulatory requirements are essential to mitigate risks and ensure successful outcomes.





Patient Engagement

Patient Engagement

Who Should Read This Section

This report is relevant to enterprises across industries and regions for evaluating providers of digital transformation services around patient engagement.

In this quadrant, ISG highlights the current market positioning of providers that offer digital transformation services in the global patient engagement space.

Patient engagement has undergone a digital revolution, transcending platform limitations to empower patients in their care journeys. Individuals actively participate in their healthcare through remote patient monitoring, digital health platforms and immersive journey mapping. The focus is solely on personalized experiences, driven by real-time data insights and seamless omnichannel interactions, ensuring timely and tailored care delivery.

These advancements prioritize data security, interoperability and user experience, driving improved health outcomes and streamlining trial processes. With personalized care delivery at scale, enterprises must collaborate closely with providers to offer tailored services and solutions that elevate the patient experience.



Digital professionals should read this report to understand providers' capabilities and positioning, which will help them select appropriate digital services and solutions related to patient engagement.



Technology professionals should read this report to understand the leading technologies, areas of investment, challenges faced by digital innovators and the key factors to achieving long-term success.

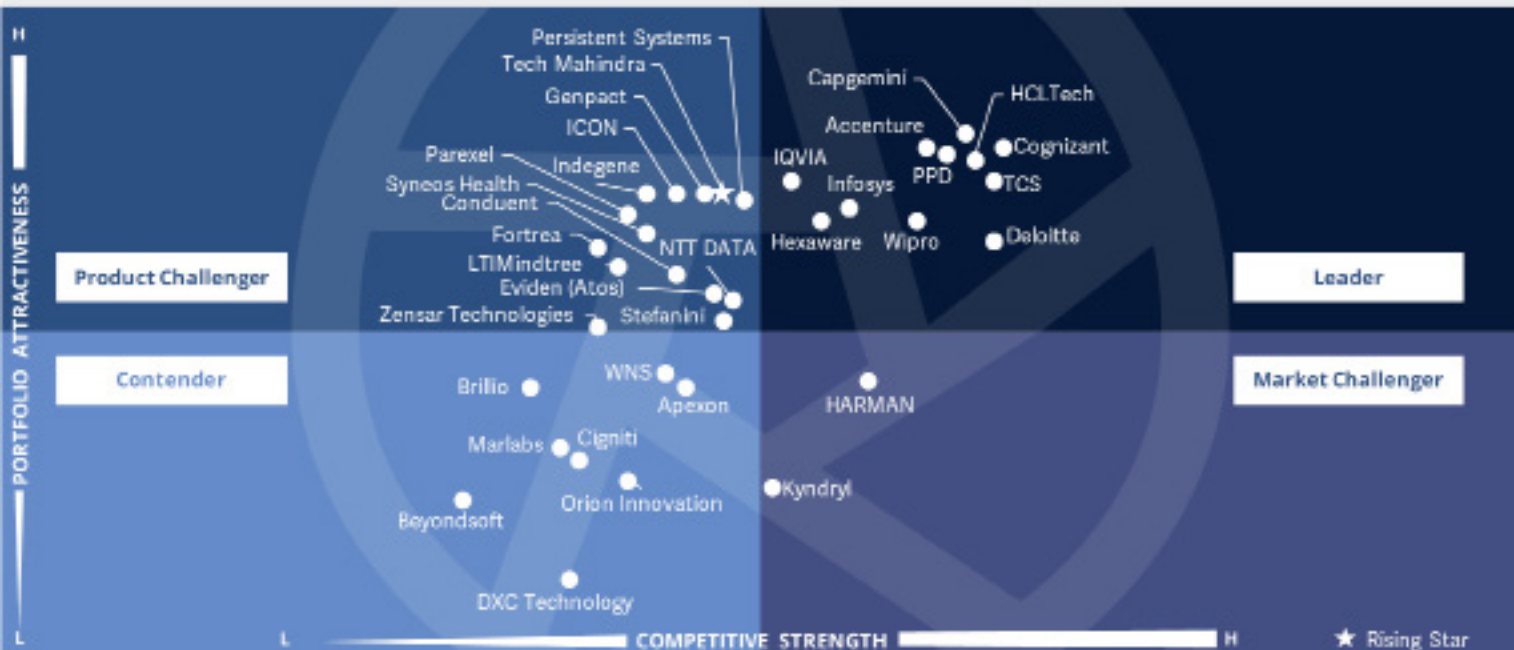


Industry practitioners should read this report to better understand end-user solutions and create business models that help maximize CX and create value for key healthcare stakeholders.



Cybersecurity professionals should read this report to understand how providers address significant compliance and security challenges while maintaining a seamless experience for end users.





This quadrant **evaluates** service providers assisting life sciences companies in directly **engaging** with patients through **patient-centered services** for medication, aiming to **enhance** their products and **patient outcomes**.

Rohan Sinha



Patient Engagement

Definition

This quadrant evaluates service providers specializing in life sciences customer services, incorporating supporting processes and platforms. The evolution of patient engagement through digitalization involves the strategic integration of advanced digital technologies and communication channels to enhance patients' involvement, interaction, and empowerment throughout their healthcare journey. This evolutionary approach utilizes digital tools such as mobile applications, wearable devices, telehealth platforms, and online portals to facilitate seamless communication between patients and healthcare providers. The overarching goal is to empower patients with access to health information, personalized care plans, and tools, enabling active participation in decision-making processes. By fostering a collaborative and patient-centric healthcare ecosystem, the digital transformation of patient engagement aspires to improve health outcomes, enhance patient satisfaction, and contribute to a more efficient and effective healthcare delivery system.

In the evolving landscape, life sciences companies directly engage with patients to provide patient-centric services related to medications, enhance their products and improve patient outcomes. This strategic shift emphasizes patient engagement, granting them a more significant role in treatment decision-making. Unlike the past, where primary contacts for life sciences companies were primarily physicians, the critical focus now involves collaborating with providers to optimize patient experience throughout the entire development lifecycle, from initial engagement to ultimate outcomes.

Eligibility Criteria

1. Ability to build a **differentiated patient experience**
2. Capability to select, implement and **manage patient engagement services** and platforms
3. Ability to develop **digital services** that provide consumer-friendly interactions
4. Deep knowledge of technologies, devices, and their connectivity, including the ability to **develop suitable device strategies**
5. Strong competencies in **device security and data privacy measures**
6. **Ability to share data and analyses** in an integrated ecosystem for communication, education, and marketing



Patient Engagement

Observations

Major players in the technology and consulting sectors are revolutionizing patient engagement in digital transformation. Providers are offering sophisticated solutions to enhance patient experiences and optimize healthcare delivery. Patients are empowered to actively participate in their care journeys through platforms and applications, such as remote patient monitoring, digital health platforms and immersive journey mapping. The focus is on personalized experiences, real-time data-driven insights and seamless omnichannel interactions, ensuring patients receive the right care at the right time. With a strong emphasis on data security, interoperability and user experience, these solutions drive improved health outcomes, streamlined trial processes and personalized care delivery at scale.

From the 39 companies assessed for this study, 36 qualified for this quadrant, with 11 being Leaders and one a Rising Star.



Accenture's INTIENT Patient platform delivers sophisticated digital solutions for personalized patient experiences. Its modular application suite enables efficient engagement and real-time data insights, optimizing care delivery.



Capgemini leads patient services digitization through immersive journey mapping and its PatientEngage Studio. Its comprehensive solutions ensure secure, compliant and omnichannel healthcare experiences, optimizing efficiency and outcomes.



Cognizant excels in comprehensive remote patient monitoring, innovative digital health platforms and decentralized clinical trials. With advanced technologies and patient-centric solutions, it drives improved health outcomes and streamlined trial processes.



Deloitte excels in patient engagement, offering end-to-end services from strategy to technology implementation. Its innovative solutions empower clients to own data, make decisions, and deliver service, ensuring personalized experiences and improved healthcare outcomes.



HCLTech revolutionizes patient engagement through innovative, human-centered solutions. With a focus on data security, interoperability and user experience, it empowers healthcare organizations to deliver personalized care at scale.



Hexaware excels in patient engagement with tailored accelerators and advanced data solutions on Salesforce Cloud. Pre-integrated IoT devices enhance data collection, while partnerships ensure secure integration, customization, and compliance.



Patient Engagement



Infosys innovates patient engagement with AI analytics, personalized medicine and real-time insights. Service innovations optimize support, enhancing recruitment and health outcomes.

IQVIA

IQVIA drives innovation in patient engagement, holistic frameworks and AI-driven analysis, enhancing outcomes through data-driven solutions.



PPD provides tailored patient engagement solutions and extensive expertise for successful clinical trials and effectively overcomes recruitment barriers.



TCS pioneers innovative patient-centric solutions like TCS ADD™ Connected Engagement & Living confidently, ensuring seamless experiences across touchpoints. Its holistic approach tailors solutions to diverse needs, leveraging advanced tech for improved outcomes.



Wipro pioneers holistic patient care through its Collaborative Care Platform, connecting patients, providers and pharmacists seamlessly. With tailored content and services, it enhances engagement and tracks progress to address common care issues.



Tech Mahindra (Rising Star) leads patient engagement with ConnectSense, offering disease education, medication reminders, coaching and telemedicine. Its HealthNxt streamlines care digitally.



Capgemini



“Capgemini elevates patient engagement in life sciences through innovative solutions and comprehensive integration, reshaping healthcare experiences.”

Rohan Sinha

Overview

Capgemini is headquartered in Paris, France. It has more than 340,000 employees worldwide. In FY23 the company generated €22.5 billion in revenue, with Applications and Technology as its largest segment. It combines intelligent platforms, advanced data services, human-centered design and transformational strategy with engineering and support capabilities. The company leads the charge in digitizing patient services through immersive journey mapping and the innovative PatientEngage Studio model, crafting tailored digital experiences that meet diverse stakeholder needs while offering comprehensive patient engagement solutions.

Strengths

Empowering digital patient services:

Capgemini leads the charge in digitizing patient services through immersive journey mapping and the innovative PatientEngage Studio model. By deeply understanding customer personas and crafting detailed patient journey maps, it develops digital experiences that cater to the diverse needs of patients, caregivers and prescribers.

Comprehensive patient engagement solutions:

Capgemini addresses the end-to-end patient engagement needs of the industry through offerings such as Frog studios’ design expertise, Q360 data services, and Patient Services 2.0 platforms. By leveraging strong domain expertise, modern development approaches and deep regulatory knowledge, it builds secure,

compliant and engaging omnichannel healthcare solutions capable of seamless integration with digital health ecosystems.

Seamless healthcare data exchange:

Capgemini excels in integrating medical communication tools and implementing standards for seamless data exchange within and beyond healthcare organizations. Its projects, including EMR integrations and next-generation hospital systems, ensure efficient healthcare delivery and better patient outcomes.

Caution

End users should review and update their risk management strategies in collaboration with Capgemini to address emerging threats and vulnerabilities in the rapidly evolving digital landscape.





Manufacturing Supply Chain

Who Should Read This Section

This report is relevant to enterprises across industries and regions for evaluating providers of digital transformation services for the manufacturing supply chain.

In this quadrant, ISG highlights the current market positioning of providers that offer digital transformation services in the global manufacturing supply chain space.

The volatile nature of the life sciences industry demands manufacturing supply chains to be more agile and resilient, meeting increasing market demands. Robust risk mitigation strategies and regulatory compliance measures are essential in achieving this goal.

Providers are prioritizing the development of digital platforms and solutions tailored to optimize costs, enhance productivity and elevate the overall CX. Key technologies such as automation, analytics and real-time insights play a crucial role in digital supply chain operations, seamlessly integrating processes from drug development to patient care.

Responding to these evolving dynamics, next-generation connected supply chain ecosystems are emerging. This evolution necessitates a holistic approach integrating niche talent, digital services and innovative technologies.

In this rapidly changing market landscape, life sciences enterprises select providers based on their ability to offer digital services, ensuring competitiveness and meeting evolving market demands.



Digital professionals should read this report to understand providers' capabilities and positioning, which will help them select appropriate digital services and solutions related to manufacturing supply chain.



Technology professionals should read this report to understand the leading technologies, areas of investment, challenges faced by digital innovators and the key factors to achieving long-term success.

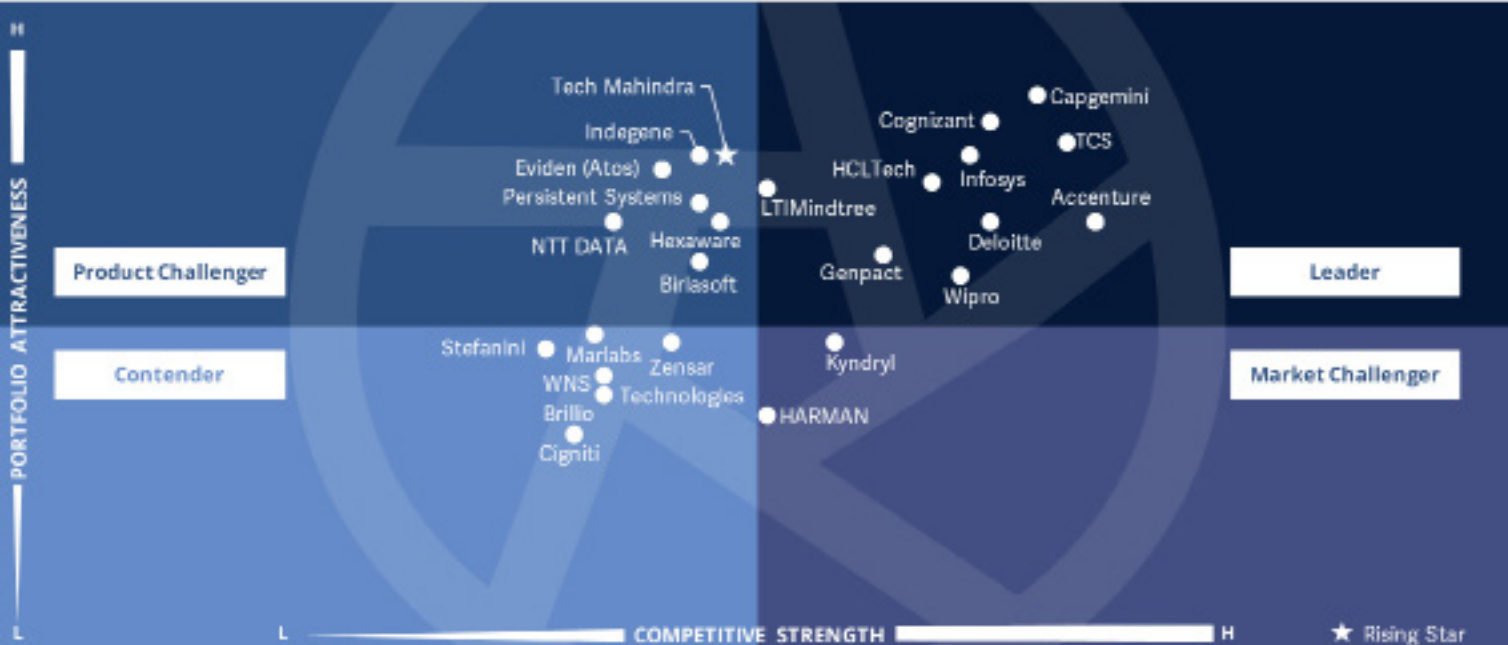


Industry practitioners should read this report to better understand end-user solutions and create business models that help maximize CX and create value for key healthcare stakeholders.



Cybersecurity professionals should read this report to understand how providers address significant compliance and security challenges while maintaining a seamless experience for end users.





This quadrant assesses service providers aiding life sciences in **enhancing manufacturing supply chain** operations through **digital transformation**, **integrating advanced technologies** for process optimization.

Rohan Sinha



Manufacturing Supply Chain

Definition

This quadrant evaluates service providers that work with their life sciences clients to improve manufacturing supply chain operations. Digital transformation within the manufacturing supply chain in life sciences involves strategically integrating advanced digital technologies and data-driven solutions to optimize and revolutionize processes across the industry's manufacturing, distribution and supply chain management. This transformative initiative aims to enhance efficiency, visibility and agility across the entire supply chain, from raw material procurement to pharmaceuticals and medical device production, quality control and distribution.

Adopting digital technologies such as IoT, AI, blockchain and advanced analytics is central in improving real-time monitoring, traceability and collaboration within the manufacturing supply chain. The goal is to streamline operations, reduce lead times, minimize errors, ensure regulatory compliance and deliver safe, high-quality products to healthcare providers and

patients. This digital transformation fosters a more resilient, adaptive and responsive life sciences supply chain ecosystem.

Effective collaboration in the manufacturing supply chain relies on technology to bridge system gaps. Analytics and AI are crucial for swift inventory relocation. Even with automation and AI, logistics managers still face the challenges of generating accurate production and shipment forecasts due to persisting manual processes. The lack of supply chain visibility impacts forecast accuracy, challenging real-time arrival estimates. Therefore, adaptability in planning is crucial for managing short-term disruptions in business operations.

Eligibility Criteria

1. **Capability to assess existing supply chains** and recommend strategy, process and technology changes to improve efficiencies, lower risk and reduce costs
2. Ability to transform manufacturing through digital methods and the 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 also 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**



Manufacturing Supply Chain

Observations

The global life sciences manufacturing supply chain has significantly transformed in the past five years. The pandemic underscored the urgency of efficient vaccine development and distribution, emphasizing the need for agile and resilient manufacturing networks. Rising consumer demand and advancements in precision medicine and telehealth have further strained supply chains, necessitating robust risk mitigation strategies and regulatory compliance measures.

Supply chain visibility, strategic sourcing and cold chain management are paramount, alongside the growing demand for personalized medicine. As a result, there is a burgeoning opportunity for IT service providers and digital platform providers to offer tailored solutions that optimize costs, enhance productivity and improve the overall customer experience.

Moreover, sustainability has emerged as a critical focus area, with increasing emphasis on environmental, social and governance (ESG) initiatives and environmentally responsible

practices throughout the supply chain. Technologies like automation, analytics and real-time insights are pivotal to digital supply chain operations, facilitating seamless integration from drug development to patient care.

In response to these dynamics, next-generation connected supply chain ecosystems are evolving, necessitating a holistic approach that integrates niche talent, digital services and innovative technologies. Ultimately, successful adaptation to these changes will be essential for life sciences enterprises to remain competitive and meet the demands of a rapidly evolving market landscape.

From the 42 companies assessed for this study, 25 qualified for this quadrant, with 10 being Leaders and one a Rising Star.



Accenture transforms life sciences with patient-centric supply chains, GenAI-driven manufacturing and strategic acquisitions for end-to-end capabilities, driving differentiation and outcomes in a competitive market.



Capgemini enables life sciences and medtech companies to leverage new scientific approaches, analytics and digital technologies for transformative drug development, manufacturing efficiency and improved health outcomes.



Cognizant delivers integrated solutions by coupling business and technology capabilities. With a vast supply chain consulting knowledge base, the company excels in blending digital tech and manufacturing domain expertise.



Deloitte's Smart Operations practice integrates global expertise in supply chain, technology and analytics to drive innovation and efficiency in consulting and implementation.



Manufacturing Supply Chain



Genpact offers end-to-end strategic manufacturing solutions, integrating data engineering, analytics and operational services to enable clients to purchase results, not just solutions.

HCLTech

HCLTech provides comprehensive end-to-end life sciences manufacturing and supply chain solutions, leveraging years of domain expertise and Industry 4.0 technologies for enhanced efficiency and resiliency.



Infosys delivers end-to-end preconfigured digital solutions for the life sciences and healthcare industry, leveraging IoT to enhance operational efficiency and optimize resource utilization with advanced data analytics.



LTIMindtree specializes in developing and supporting life sciences industry-specific solutions and services, driving digital adoption in R&D, clinical labs, manufacturing and supply chain operations with proprietary platforms like iNXT and Fosfor Lumin.



TCS offers industry-specific solutions and alliances, driving innovation through research collaborations and strategic partnerships, focusing on supply chain as a service for dynamic ecosystem management and revenue growth.



Wipro leverages cross-industry expertise to tailor pharmaceutical solutions, ensuring quality, compliance and efficiency. Decades of experience and a holistic approach enable it to offer comprehensive services across the life sciences value chain.



Tech Mahindra (Rising star) digital supply chain integrates technology, tools and services for end-to-end transformation. With expertise spanning design, plan, source, make, delivery and aftermarket, it offers comprehensive solutions for optimized operations.





“Capgemini’s strength lies in the seamless integration of digital and core engineering services, driving impactful business outcomes for clients.”

Sneha Jayanth

Capgemini

Overview

Capgemini is headquartered in Paris, France. It has more than 340,000 employees worldwide. In FY23 the company generated €22.5 billion in revenue, with Applications and Technology as its largest segment. It is dedicated to evaluating maturity, crafting visionary road maps and orchestrating transformations with a strong focus on value. The company ensures end-to-end visibility by designing, integrating and deploying robust supply chain capabilities, driving business success. It helps businesses achieve operational excellence and competitive advantage in their respective markets.

Strengths

Advanced manufacturing technologies:

Capgemini’s advanced manufacturing technologies harness cutting-edge innovations like GenAI for proactive maintenance and predictive modeling for patient response forecasting. From optimized raw material mixes to AI-assisted inspection and energy mix optimization, it ensures consistent production, reduced downtimes and enhanced quality control, setting a benchmark for competitive differentiation in the marketplace.

Industry 4.0 and digitalization: Capgemini empowers manufacturing and supply chain excellence journey. It provides tailored solutions while leveraging lean frameworks and Industry 4.0 principles and enables transformational improvements, ensuring

quality, compliance and breakthrough performance across sites and therapeutic areas. The holistic approach encompasses digital transformation, smart forecasting, agile order-to-delivery operations, and laboratory workflow optimization, driving efficiency, innovation and patient centrality in the production and delivery of therapies.

Sustainability initiatives: Capgemini prioritizes sustainability with initiatives to reduce energy consumption, waste generation and greenhouse gas emissions. Embracing green manufacturing practices and using renewable energy sources ensures environmental responsibility while driving innovation and efficiency across operations.

Caution

Capgemini’s strong presence in Europe and North America sets the stage for expansion into Asia Pacific (APAC) and Latin America (LATAM). While a promising growth opportunity, strategic planning and meticulous execution are vital for successful expansion and sustained excellence.





Pharmacovigilance and Regulatory Affairs – Digital Evolution

Who Should Read This Section

This report is relevant to enterprises across industries and regions for evaluating providers of digital transformation services around pharmacovigilance and regulatory affairs.

In this quadrant, ISG highlights the current market positioning of providers of pharmacovigilance and regulatory affairs transformation services globally and how each provider addresses the key challenges in this space.

Regulatory and pharmacovigilance processes are crucial in ensuring the safety, efficacy and compliance of medical products and therapies. Leading providers in the market offer comprehensive regulatory assistance, guiding companies through the intricate approval process. They also provide advanced pharmacovigilance solutions to monitor and assess the safety of pharmaceutical products post-market.

With the advancement of technologies, such as AI, analytics, and automation, these providers streamline processes, enhancing the detection of safety signals and, ultimately, contributing to improved patient outcomes. However, in this evolving landscape, changes driven by digital medicine will necessitate more intensive and sophisticated reporting.

New technologies must efficiently manage the increased volume of data while adhering to regulations and maintaining security. Providers must ensure that their solutions are efficient and compliant with regulatory standards, thus safeguarding patient safety and maintaining industry integrity.



Digital professionals should read this report to understand providers' capabilities and positioning, which will help them select appropriate digital services and solutions related to pharmacovigilance.



Technology professionals should read this report to understand the leading technologies, areas of investment, challenges faced by digital innovators and the key factors to achieving long-term success.

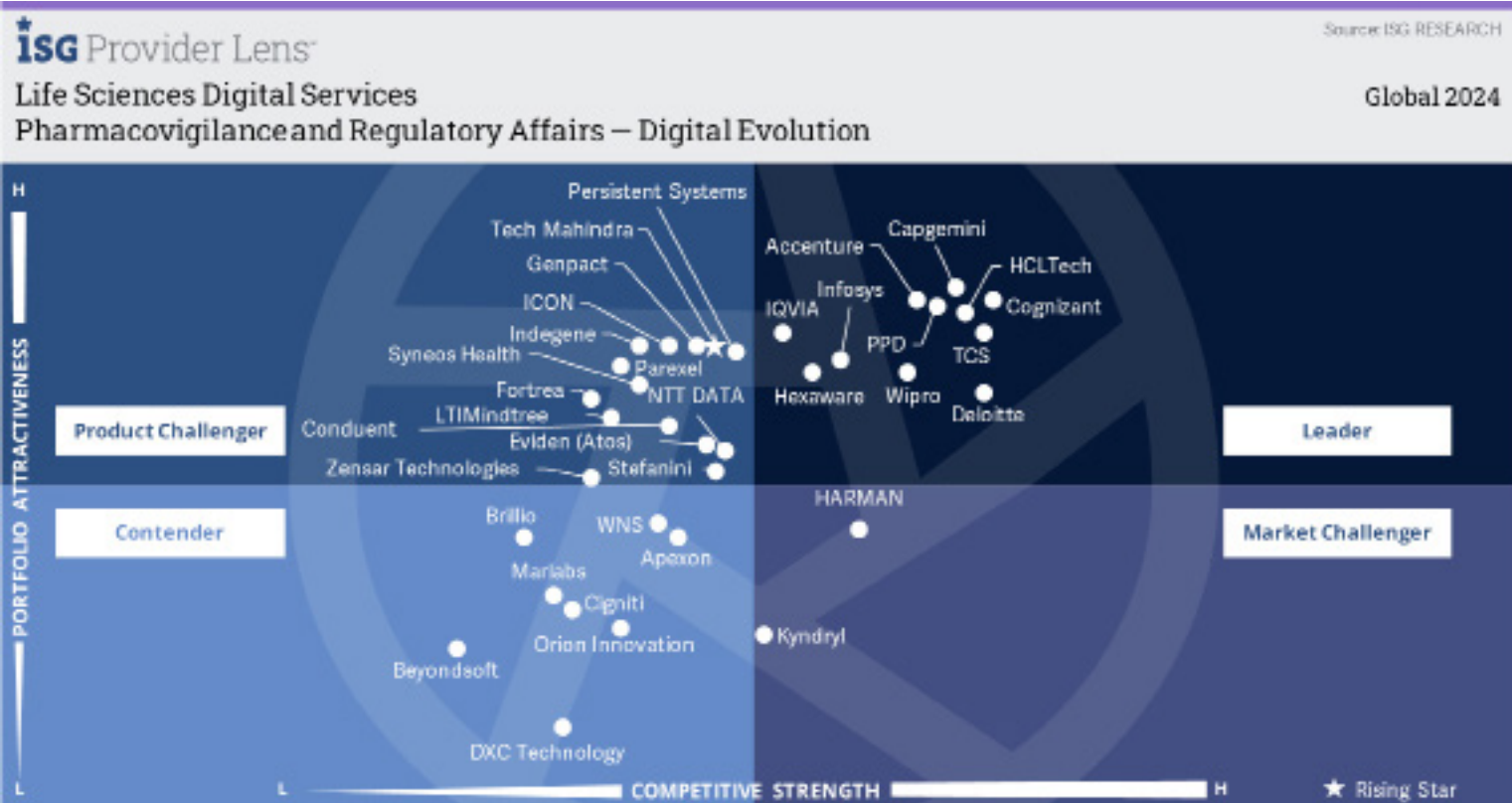


Industry practitioners should read this report to better understand end-user solutions and create business models that help maximize CX and create value for key healthcare stakeholders.



Cybersecurity professionals should read this report to understand how service providers address significant compliance and security challenges while maintaining a seamless experience for end users.





This quadrant evaluates **digital solutions** for pharmacovigilance and regulatory affairs. Leaders show innovation in **AI, machine learning and natural language processing (NLP)**, alongside technical and subject matter expertise.

Rohan Sinha



Definition

This quadrant evaluates service providers, within the life sciences domain, specifically focusing on supporting patient safety monitoring, adhering to global and local regulatory requirements and facilitating reporting through diverse processes and platforms. Life sciences companies are encountering heightened scrutiny from regulatory bodies and consumer advocacy groups, emphasizing the need to ensure patient safety and maintain quality and compliance standards across their products and operations. The primary goal is to execute various activities while delivering exceptionally high-quality products and complying with local and global reporting and regulatory norms.

While AI has already proven effective in supporting specific aspects of these activities, recent breakthroughs in NLP and ML within life sciences enterprises are opening avenues for innovation and operational efficiency.

As the industry undergoes a transformative shift toward digital medicine, an imperative for more sophisticated and robust reporting mechanisms emerges. This evolution requires adopting secure, efficient and compliant technologies to effectively manage the escalating volume of data in pharmacovigilance and regulatory affairs processes. The intersection of technological advancements and the dynamic landscape of the life sciences sector offers the potential for meeting current standards and surpassing them through strategic and advance digital transformations.

Eligibility Criteria

1. Ability to create, manage, monitor and continuously improve upon a **differentiated service offering** in one or both of these areas
2. Demonstrate expertise in global, **regional and local regulations**, patient safety reporting and compliance measures.
3. Showcase clearly delineated **quality and compliance** processes and related employee training programs
4. Capability to select, implement and **manage pharmacovigilance or regulatory affairs** services and platforms
5. Ability to integrate with **internal service offerings** in adjacent areas and with external platforms
6. Proficient in creating **consumer-friendly digital interactions** and developing strategic approaches through deep knowledge of relevant technologies
7. Expertise in **securing data, platforms and systems**, while also facilitating integrated data sharing for communication, reporting and education within ecosystems.



Pharmacovigilance and Regulatory Affairs – Digital Evolution

Observations

Within the pharmaceutical and biopharmaceutical industry's regulatory and pharmacovigilance space, myriad companies specialize in ensuring the safety, efficacy and compliance of medical products and therapies. These firms offer comprehensive regulatory assistance, guiding companies through the complex approval process and providing advanced pharmacovigilance solutions to monitor and assess the safety of pharmaceutical products post-market. Leveraging advance technologies like AI, these companies streamline processes, detect safety signals more efficiently and, ultimately, contribute to improved patient outcomes. Through their expertise and innovation, they play a vital role in advancing medical science and enhancing public health globally.

From the 40 companies assessed for this study, 25 qualified for this quadrant, with nine being Leaders and one a Rising Star.



Accenture offers end-to-end regulatory support, deep expertise in regulatory affairs and advanced technological solutions, ensuring seamless assistance, compliance and efficiency for pharmaceutical and biopharma companies.



Capgemini excels in pharmacovigilance and regulatory affairs, ensuring robust drug safety management and global compliance. Its digital solutions streamline activities, optimizing regulatory processes and empowering clients.



Cognizant's AI solutions optimize regulatory compliance, operational efficiency and pharmacovigilance. Tools like Automated Mail Response and Neuro streamline processes, cutting costs. GenAI automates document handling and case assessment to improve efficiency.



Deloitte leads with regulatory excellence using expertise and innovation. Its integrated solutions drive efficiency and compliance. The company's strategic partnerships drive compliance, patient safety and value generation.



HCLTech offers comprehensive regulatory services and advanced GenAI solutions. Partnering with industry leaders, it streamlines pharmacovigilance and regulatory processes, ensuring efficient case management and compliance.



Infosys excels in regulatory domain business analysis and consulting, offering deep expertise in regulatory guidance, submission strategies and compliance. Its holistic approach supports clients from concept to market with streamlined processes.



Pharmacovigilance and Regulatory Affairs – Digital Evolution



PPD integrates regulatory expertise and clinical delivery experience to offer comprehensive PV and regulatory solutions. Its AI integration includes SaaS solutions with OCR and machine learning, ensuring streamlined regulatory compliance.



TCS leads in pharmacovigilance with the AI-driven TCS ADD™ Safety platform for adverse event management. Focused on regulatory compliance and operational excellence, TCS delivers tailored end-to-end services to maximize client benefits in healthcare.



Wipro innovates with platforms like Talosafe and NeuroSAFE, employing AI and automation for efficiency and compliance. GenAI, backed by academic ties, helps the company foster practical solutions.



Indegene (Rising Star) pioneers GenAI for pharmaceutical efficiency, partnering with Microsoft and AWS. Its comprehensive PV suite includes regulatory consulting, compliance support and NAEM solutions, streamlining processes and supporting electronic submissions.





“Capgemini ensures safety and compliance excellence, empowering clients to navigate regulatory complexities confidently.”

Rohan Sinha

Capgemini

Overview

Capgemini is headquartered in Paris, France. It has more than 340,000 employees worldwide. In FY23 the company generated €22.5 billion in revenue, with Applications and Technology as its largest segment. It provides integrated support for PV and regulatory affairs, enhancing business processes, ensuring compliance, managing safety and conducting regulatory activities efficiently. Leveraging its expertise in crafting and executing digital strategies, the company collaborates with external partners to develop AI-enabled tools, analytics and NLP-powered automation, driving digital transformation in the pharmaceutical industry.

Strengths

Regulatory and safety proficiency:

Capgemini excels in pharmacovigilance and regulatory affairs, providing comprehensive drug safety assessment and compliance support. Its expertise ensures adherence to international regulations, optimizes business processes and facilitates effective communication with health authorities, enhancing regulatory compliance efforts.

Strategic focus on GenAI: Capgemini strategically adopts GenAI to transform business operations, content creation and decision-making processes. In life sciences, including pharmacovigilance and regulatory affairs, the company leverages group investment to deploy GenAI effectively, accelerate client capability building and navigate organizational change. It focuses on

enhancing AI model trust and explainability, identifying areas where GenAI adds value to compliance activities and exploring its potential for augmenting regulatory intelligence programs.

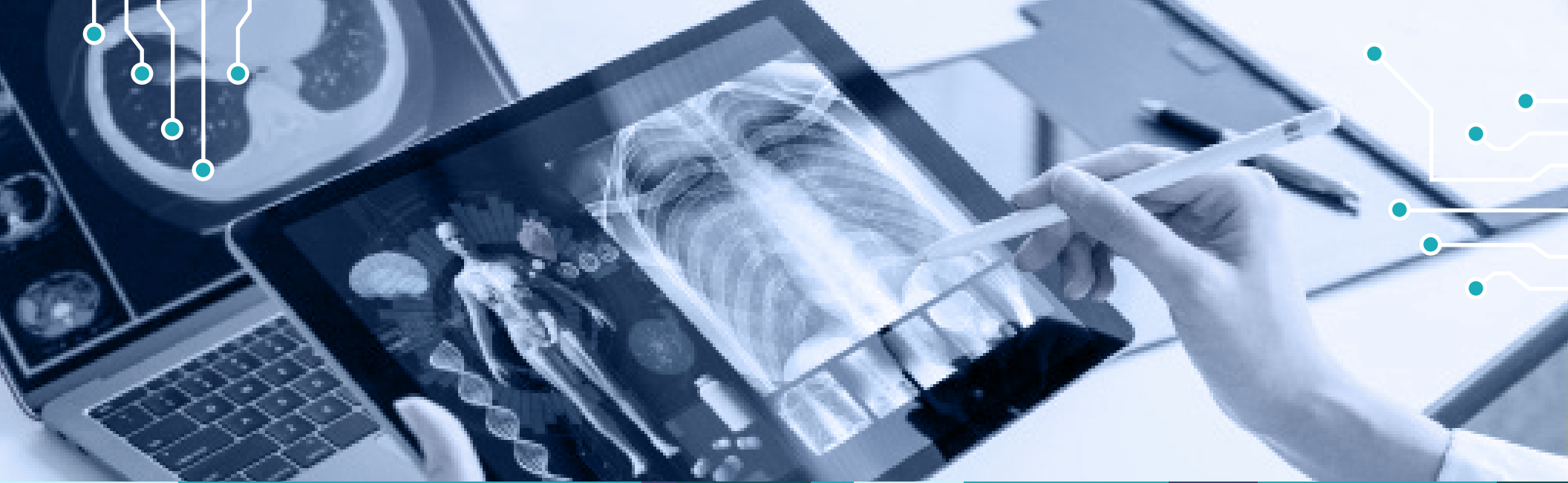
Tailored process transformation:

Capgemini has strength in transforming regulatory and quality processes, enabling clients to focus on core activities. Its agile approach ensures smooth technology transfers and optimization, and is supported by comprehensive expertise across project management, quality assurance, regulatory affairs and supply chain management. Clear plans align stakeholders for effective implementation.

Caution

Tailored process transformations may face implementation hurdles. Clients should collaborate closely with Capgemini to address potential challenges and ensure smooth transitions.





Commercial Operations – Digital Evolution

Who Should Read This Section

This report is relevant to enterprises across industries and regions for evaluating providers of digital transformation services around the digital evolution of commercial operations.

In this quadrant, ISG highlights the current market positioning of providers of commercial operations services globally and how each provider addresses the key challenges in this space.

The digital revolution within the life sciences industry has sparked significant shifts in commercial operations, aiming to elevate customer engagement and streamline operational strategies. This transformation is driven by the pursuit of enhanced customer insights, operational efficiency and effective marketing tactics.

As the industry landscape continues to evolve, there is a critical need to reevaluate commercial models to align with shifting business objectives, portfolio dynamics and the expanding technological landscape.

A key trend involves leveraging AI capabilities to anticipate customer behavior, tailor messaging and optimize channel strategies for personalized engagement. Central to this approach is a commitment to patient centricity, fostering enduring connections with healthcare professionals (HCPs), patients, payers and other stakeholders through cohesive marketing initiatives.

In response to these changes, enterprises are innovating their sales, marketing and market access strategies, aiming to better address the evolving needs of customers and patients.



Digital professionals should read this report to understand providers' capabilities and positioning, which will help them select appropriate digital services and solutions related to commercial engagement.



Technology professionals should read this report to understand the leading technologies, areas of investment, challenges faced by digital innovators and the key factors to achieving long-term success.



Industry practitioners should read this report to better understand end-user solutions and create business models that help maximize CX and create value for key healthcare stakeholders.



Cybersecurity professionals should read this report to understand how service providers address significant compliance and security challenges while maintaining a seamless experience for end users.





This quadrant assesses service providers specializing in driving the digital evolution of life sciences commercial operations, **leveraging AI, IoT and data-driven insights for efficiency and innovation in pharmaceuticals, healthcare and biotechnology.**

Rohan Sinha



Commercial Operations – Digital Evolution

Definition

This quadrant evaluates service providers that specialize in driving the digital evolution of life sciences commercial operations, incorporating supporting processes and platforms. Key focus areas include data analytics, customer engagement, supply chain optimization and personalized medicine. Embracing technologies such as AI, IoT and data-driven insights enhances efficiency and innovation in pharmaceuticals, healthcare and biotechnology. Digitalization streamlines processes, improves data-driven decision-making and delivers overall enterprise business value. Life sciences companies are implementing AI, with a keen eye on the potential of GenAI, to identify market opportunities and risks. Additionally, there is a shift toward exploring digital channels for direct-to-consumer engagement, online sales and efficient healthcare product distribution.

Within this context, life sciences' commercial operations seamlessly integrate sales and marketing analytics, pricing analysis, order management, CRM and ERP. This comprehensive approach optimizes decision-making, refines marketing strategies, ensures efficient order processing, fosters strong customer relationships and provides a centralized platform for holistic business management. The ultimate goal is to achieve operational excellence and commercial success in the dynamic and evolving landscape of life sciences.

Eligibility Criteria

1. Ability to build and manage a **differentiated commercial operations environment**
2. Capability to select, implement and manage **commercial operations services and platforms**
3. Ability to **develop digital services** that provide market insights, opportunities and risks
4. Deep knowledge of platforms, including the ability to **develop suitable commercial strategies**
5. Strong competencies in **securing commercial operations**, emphasizing data privacy measures
6. **Ability to share data and analyses** in an integrated ecosystem for communication, education and marketing



Commercial Operations – Digital Evolution

Observations

The digital evolution of commercial operations in the life sciences industry has significantly changed customer engagement and operational strategies. New digital approaches complement traditional methods to improve customer insights, operational efficiency, and marketing effectiveness.

Omnichannel commercial campaigns are emerging as a key strategy driven by the principles of patient centricity. These campaigns facilitate long-term relationships with healthcare professionals, patients, payers and other stakeholders through integrated marketing efforts. Harnessing the power of AI enables companies to predict behavior, tailor messaging and optimize channel strategies for personalized engagement.

Patient engagement and services are transforming, focusing on understanding and meeting patient needs beyond product efficacy and safety. Value-based patient solutions now encompass a range of services throughout the

patient journey, including treatment adherence support, disease management and access to educational resources.

Identification and lead conversion are evolving in response to shifting consumer behavior toward technology and direct engagement. Life sciences companies leverage digital channels to execute growth-hacking strategies, improving CX while minimizing acquisition costs.

Overall, the evolving landscape necessitates reevaluating commercial models to align with changing business objectives, shifting portfolios and increasing emphasis on patient centricity. Enterprises are exploring new approaches to sales, marketing, and market access to better serve evolving customer and patient needs.

From the 32 companies assessed for this study, 21 qualified for this quadrant, with 10 being Leaders and one a Rising Star.



Accenture drives change in life sciences commercial operations through fair, accessible strategies and digital innovation. With a focus on sustainability and cutting-edge innovation, it accelerates industry advancements, fostering long-term success and societal impact.



Capgemini provides comprehensive commercial solutions, blending consulting, experience design, tech implementation and operations for holistic business outcomes. It delivers exceptional CX and advanced sales and service solutions through digital engagement and personalization.



Cognizant delivers end-to-end solutions for life sciences, focusing on sales, marketing, patient centricity and market access. Its expertise spans research, operations, analytics and digital transformation, driving efficiency and effectiveness across the value chain.



Deloitte offers holistic commercial solutions, spanning strategy, marketing, patient experience and technology integration. Its end-to-end support optimizes operations and drives innovation, empowering clients to maximize value and stay ahead in a dynamic market.



Commercial Operations – Digital Evolution



Genpact's sales and commercial team optimizes product delivery and service to drive revenue growth. Leveraging industry expertise, data insights and AI capabilities, they transform marketing and sales operations, enhancing CX and loyalty while delivering on commitments.

HCLTech

HCLTech offers comprehensive commercial operations services with advanced automation and specialized solutions, driving marketing and sales excellence and ensuring compliance and customer engagement. Through strategic partnerships, it delivers unmatched value globally.



Indegene streamlines commercial operations with cutting-edge technologies like AI and ML, fostering strategic partnerships for best-in-class solutions. Future-focused, it embraces GenAI for campaigns, ensuring clients stay ahead in the dynamic life sciences landscape.



Infosys pioneers commercial transformation in life sciences with diverse offerings, strategic partnerships and innovative digital solutions. With global reach and accolades, it leverages advanced analytics and tech expertise to drive revenue and efficiency in the industry.



TCS excels in digital solutions, prioritizing customer-centric strategies and leveraging advanced technology for enhanced engagement. With expertise in digital experience management and intelligent insights, it drives growth through tailored sales and marketing initiatives.



Tech Mahindra leads in life sciences sales and marketing with GenAI-driven solutions and strategic bets in patient experience. Its focus on advanced technology integration ensures transformative solutions for operational efficiency and enhanced customer satisfaction.



Hexaware (Rising Star) excels in commercial solutions, using digital engagement, omnichannel enablement and field force support. With partnerships, it integrates cutting-edge technology like GenAI for tailored solutions, driving growth and efficiency in commercial operations.



Capgemini



“Capgemini transforms vision into reality, helping businesses evolve, innovate and thrive in a dynamic market landscape. With a focus on growth, sustainability and customer centricity, it aims to shape tomorrow’s success stories.”

Sneha Jayanth

Overview

Capgemini is headquartered in Paris, France. It has more than 340,000 employees worldwide. In FY23 the company generated €22.5 billion in revenue, with Applications and Technology as its largest segment. It uniquely offers comprehensive commercial solutions spanning business consulting, experience design, technology implementation and operations, ensuring total business outcomes. The company drives tailored solutions for sustained success by leveraging industry-specific assets and deep domain knowledge.

Strengths

End-to-end commerce solutions: Capgemini offers end-to-end commerce solutions, from e-commerce strategy development to omnichannel marketplace implementation. It specializes in creating immersive buying experiences, managing digital content, optimizing order fulfillment and enhancing product information management, catering to B2C, D2C and B2B customers.


Comprehensive CX expertise: Capgemini creates and shapes customer engagements across all touchpoints, including web, mobile apps and physical stores. Its experience in design and customer journey management expertise ensures positive and memorable interactions at every step.

Advanced sales and service solutions: With a focus on sales and service, Capgemini designs and implements strategies to engage digitally connected buyers and deliver personalized after-sales experiences. By leveraging cutting-edge technology and data-driven insights, the company helps businesses increase conversion rates, boost customer retention and improve overall customer satisfaction. This approach ensures that sales and service processes are seamlessly integrated and optimized, providing customers with a consistent and high-quality experience from initial contact through post-purchase support.

Caution

While striving for immersive experiences and personalized engagements, it is crucial to maintain data privacy and ethical use of customer information. Balancing innovation with respect for customer’s trust builds long-term relationships and sustains a positive brand reputation.





Star of Excellence

A program, designed by ISG, to collect client feedback about providers' success in demonstrating the highest standards of client service excellence and customer centricity.

Customer Experience (CX) Insights

Source: ISG Star of Excellence™ research program, Insights till [June] 2024

In the ISG Star of Excellence™ research on enterprise customer experience (CX), clients have given feedback about their experience with service providers for their **Life Sciences Digital Services**.

Based on the direct feedback of enterprise clients, below are the key highlights:

Client Business Role

- ▲ **Most satisfied**
Human Resources
- ▼ **Least satisfied**
Finance

Region

- ▲ **Most satisfied**
Australia/New Zealand
- ▼ **Least satisfied**
Western Europe

Industry Average CX Score



- ▲ Highest CX: 75.6
- ▼ Lowest CX: 58.7

CX Score: 100 most satisfied, 0 least satisfied
Total responses (N) = [142]

Most Important CX Pillar

Governance and Compliance

Service Delivery Models	Avg % of Work Done
Onsite	45.8%
Nearshore	19.1%
Offshore	35.0%





Appendix

The ISG Provider Lens 2024 – Life Sciences Digital Services research 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

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Rohan Sinha

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Sneha Jayanth

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Sonam Khanna

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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 services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of June 2024, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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

The study was divided into 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 & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Use of Star of Excellence CX-Data
6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
 - * Strategy & vision
 - * Tech Innovation
 - * Brand awareness and presence in the market
 - * Sales and partner landscape
 - * Breadth and depth of portfolio of services offered
 - * CX and Recommendation



Author & Editor Biographies



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.



Co-author and Research Analyst

Sneha Jayanth
Senior 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™

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™

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