IDC MarketScape

IDC MarketScape: Worldwide Life Sciences R&D Strategic Consulting Services 2026 Vendor Assessment

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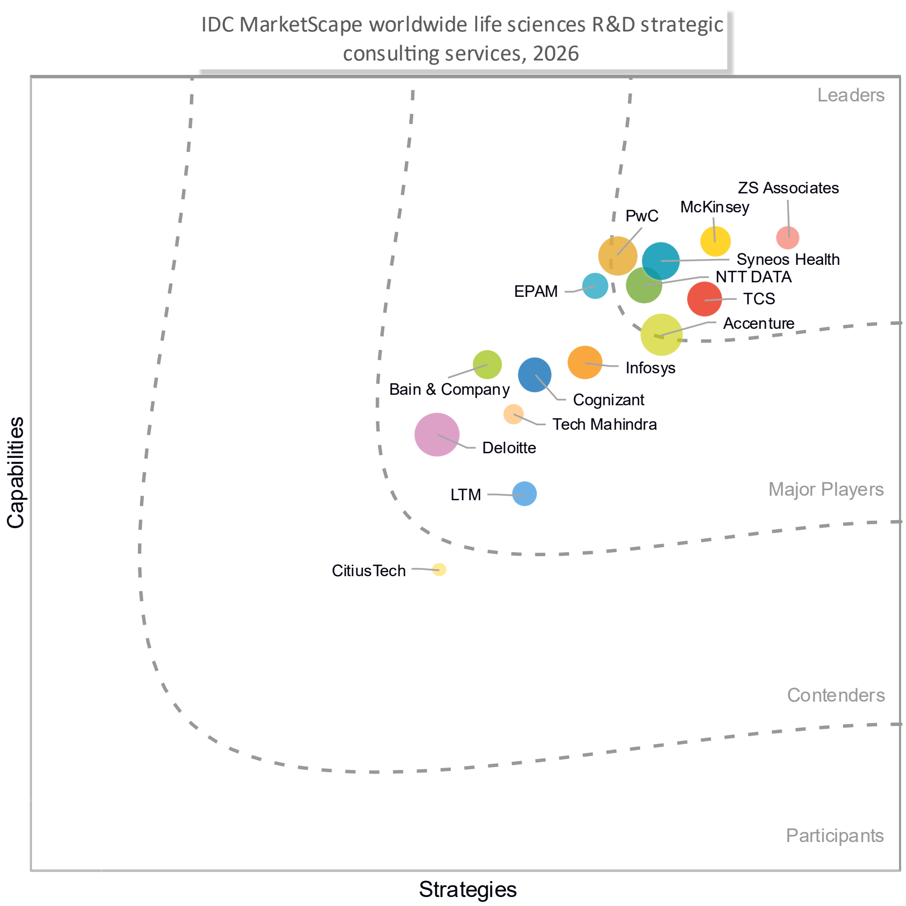
THIS EXCERPT FEATURES ZS ASSOCIATES AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape worldwide life sciences R&D strategic consulting services vendor assessment



Source: IDC, 2026

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Please see the Appendix for detailed methodology, market definition, and scoring criteria.

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Life Sciences R&D Strategic Consulting Services 2026 Vendor Assessment (Doc # US53009826).

IDC OPINION

The life sciences strategic consulting (SC) market is moving into a more consequential phase. Strategic consulting is no longer being purchased only as episodic advisory support around isolated business questions; it is increasingly being used as a lever to reshape how R&D organizations make decisions, design operating models, modernize technology environments, and create value from data, AI, and external partnerships.

As indicated in the 2023 strategic consulting IDC MarketScape, strategic consulting providers were playing a critical role in supporting their life sciences customers in addressing the disruption that had been triggered by the COVID-19 pandemic, ever-changing global scenarios, and rapidly evolving regulations, while underscoring the growing importance of consulting partners that can combine domain expertise, technology fluency, and change management leadership.

Today, the market is shifting from strategy-led advisory to strategy-plus-execution driven transformation and is becoming more embedded in enterprise change agendas. Buyers are asking for help not only with portfolio and operating model questions but also with data and digital health strategy, regulatory and quality modernization, process optimization, R&D operating model design, organizational change management, and AI-enabled transformation.

AI is reshaping the fundamental basis of competition, though core life sciences domain expertise remains critical. GenAI and agentic AI now appear in a large share of vendor road maps, innovation narratives, and future growth plans. However, life sciences companies are expecting AI to be tied to measurable productivity, quality, content, regulatory, and decision support outcomes, not just positioned as thought leadership. The technology providers that are most likely to outperform will be those that can connect scientific and R&D depth with data, AI, platform, and operating model capabilities and then carry that vision through to adoption and value realization.

The life sciences industry is finding itself at a pivotal inflection point, one defined not merely by the continued proliferation of GenAI but by the rapid emergence of agentic AI and the mounting pressure to translate digital investments into measurable enterprise value. Three years after the pandemic catalyzed unprecedented technology adoption in the sector, the industry is grappling with a sobering reality. While nearly half of life sciences executives (48%) have identified accelerated digital transformation as a trend likely to have substantial impact on their organizations in 2026, only 22% report having successfully scaled AI, and a mere 9% report achieving significant returns on these efforts (source: Deloitte's *2026 Life Sciences Outlook).* The conversation has decisively shifted from "should we adopt AI?" to "how do we govern, scale, and generate tangible ROI from it?"

The GenAI wave, which upended prior assumptions about clinical trial design, regulatory documentation, and commercial strategy, is now giving way to an agentic AI paradigm. Agentic AI systems that can act autonomously, make decisions, and perform multistep tasks without human intervention are already entering the strategic consulting conversations. Responses to the 2026 IDC life sciences R&D strategic consulting vendor RFI suggest that participating strategic consulting vendors are embedding agentic AI components in a third of their strategic consulting engagements, with several reporting significant agentic AI adoption across their strategic consulting portfolios and predicting exponential growth.

At the same time, macroeconomic headwinds including geopolitical volatility, drug pricing reform pressures, rising inflation, and evolving tariff regimes have created a turbulent environment leading to a dual challenge for the life sciences industry — namely, cutting costs while accelerating innovation. The CXO focus that had briefly shifted toward growth in the post-pandemic surge has once again pivoted to sustainability and efficiency. This is creating an urgent mandate for strategic consulting partners to demonstrate not just intellectual capital but tangible, measurable operational impact. Outcome-based and value-linked pricing models are no longer differentiators — they are becoming table stakes.

Cybersecurity concerns are seen as a key strategic risk factor for the life sciences industry, and the responsible AI agenda, encompassing data privacy, bias mitigation, model hallucination, regulatory compliance, and patient safety, has risen sharply to the top of the life sciences CXO agenda. Therefore, strategic consulting partners are being called on to serve as trusted co-architects of AI governance frameworks — not just to design the strategy but to ensure it meets the bar set by regulators such as the FDA, EMA, and ICH.

The demand for strategic consulting in the life sciences industry remains resilient. However, the market is becoming more competitive, more ecosystem driven, and more talent constrained. As a result, scale alone will not be enough. Strategic consulting providers will need to demonstrate differentiated expertise, executive relevance, credible delivery models, and the ability to turn transformation ambition into practical outcomes

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

IDC frequently has unique insights into vendor selection processes within life sciences companies through clients and contacts in the industry. For a vendor to be considered for inclusion in this study, its services must have been significantly evaluated for the potential to engage clients within the target IDC MarketScape on R&D strategic consulting services in the life sciences industry.

The key inclusion criteria for this IDC MarketScape included:

- Vendors should have had at least five customers for their strategic consulting offering for at least 12 months as of September 1, 2025.
- Vendors should provide strategic consulting services as defined in the Market definition section of this study.
- Vendors should have a minimum company revenue of $200 million.

Further research and due diligence were then conducted to narrow the list of vendors to only those that IDC viewed as legitimate contenders for future deals within life sciences R&D strategic consulting.

ADVICE FOR TECHNOLOGY BUYERS

IDC has developed a five-stage AI Maturity Framework spanning three dimensions — strategy, people, and technology. These five stages are: the Ad Hoc (AI Scramble) stage, the Opportunistic (AI Pivot) stage, the Repeatable (AI Alignment) stage, the Managed (AI Transform) stage, and the Optimized (AI-Fueled Organization) stage. Notably, IDC found that nearly half the life sciences industry (48.6%) was at Stage 2 (the AI Pivot stage, where organizations were trying to get organized but remain largely experimental and fragmented). Only 8.5% had reached Stages 4 or 5 (AI Transform or AI-Fueled Organization) (see *IDC MaturityScape Benchmark: AI-Fueled Life Sciences Organization Worldwide, 2025,* IDC #US53345625, May 2025). The race to become an AI-fueled organization is on, but most of the industry is still early in the journey. While some are still defining their AI governance frameworks, others are attempting to scale agentic AI systems across clinical operations, regulatory workflows, and commercial strategy. As life sciences organizations struggle to move from AI experimentation to enterprisewide value realization, they are looking for the right SC partner to guide them credibly through that journey.

The identification of the right strategic partners — those that can navigate both the technical and organizational dimensions of AI transformation — remains the industry's biggest challenge. According to IDC's view of the strategic consulting ecosystem, key attributes that life sciences companies should look for in their service providers include:

- The breadth and depth of life sciences R&D strategic consulting services across the full R&D value chain
- Expertise in generative AI and agentic AI — encompassing strategy, governance, responsible AI frameworks, and enterprise-scale implementation
- Proprietary platforms, accelerators, and AI assets that the partner brings to the table — including tools for clinical trial optimization, regulatory intelligence, and real-world evidence (RWE) generation
- Strong digital, data, and analytical skills — including expertise in data architecture, cloud platforms, interoperability, and advanced analytics
- The number and relevance of prior strategic consulting engagements in life sciences R&D
- Geographical footprint and global delivery capabilities, including experience navigating regional regulatory environments (FDA, EMA, ICH, and APAC-specific requirements)
- The focus of the vendor on the life sciences R&D sector and the number of senior consultants with relevant domain expertise
- The ability to provide interdisciplinary expertise — blending scientific, clinical, regulatory, commercial, and technology capabilities — to bring an "outside-in" perspective
- The vendor's pace of investment in innovation, including R&D spend, acquisitions, and new capability buildout
- Flexible, outcome-oriented pricing models — including value-based, gain-share, and risk-sharing arrangements — and the vendor's demonstrated willingness to coinvest and share risk
- The depth of industry-specific knowledge and the ability to translate this into tangible client performance improvements, including cost savings, speed to submission, and R&D productivity
- Foundational service capabilities, corporate financial stability, and the ability to serve different types and sizes of life sciences clients — from large multinational pharma to emerging biotech
- Customer references to examine vendor capabilities surrounding project management, change management, technical skills, account management, and overall value delivery
- The vendor's initiative to build ecosystems of innovation — including consortiums, academic partnerships, and industry alliances — to fuel thought leadership and shared learning
- Life sciences regulatory expertise across geographies and demonstrated expertise in cybersecurity and data privacy within an AI-driven context

- Expertise in responsible, ethical, and explainable AI — including experience with AI validation frameworks for regulated life sciences environments
- The ability to serve as a true change agent and transformation partner at the enterprise level, not just an advisor but a co-creator of sustained organizational capability
- Demonstrated track record in bridging strategy and execution — organizations should seek partners that can follow through on strategic recommendations with disciplined, measurable implementation

The strategic consulting provider landscape is dominated by large, integrated technology implementation and consulting firms, alongside specialist life sciences consultancies. However, one is seeing the entrance of technology-native firms, as well as contract research organizations (CROs) in this space, signaling that buyers now have a substantially broader set of credible choices. Life sciences organizations must assess not just current capabilities but future readiness: how aggressively is the vendor investing in agentic AI, proprietary IP, and talent? How robust is the vendor's change management practice as AI adoption reshapes organizational structures and job roles across R&D?

Life sciences organizations should pay careful attention to how vendors differentiate themselves in an increasingly crowded market. They must assess not just current capabilities but future readiness: how aggressively is the vendor investing in agentic AI, proprietary IP, and talent? How robust is the vendor's change management practice as AI adoption reshapes organizational structures and job roles across R&D? They should evaluate strategic consulting partners through a dual lens: strategic relevance and delivery credibility.

Buyers must define the problem with precision, determining whether the need is enterprisewide, function specific, or technology adjacent, and then align partner selection accordingly. They should prioritize firms that can bridge strategy and execution and should scrutinize and validate AI claims carefully through the lenses of workflow fit, governance, regulatory acceptability, data readiness, measurable impact, and adoption. They should seek deep life sciences expertise, not just general consulting or technology credentials.

Last, life sciences buyers should demand clarity on pricing and commercial models. The era of FTE-based billing for strategic consulting is giving way to a multimodel landscape. Fixed-price, outcome-based, gain-share, licensing, and agile squad-based commercial arrangements are all increasingly in use. Organizations must seek out strategic consulting partners and negotiate models that align vendor incentives with client outcomes — ensuring that both parties are invested in the success of the transformation.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

ZS Associates

After a close evaluation of ZS Associates' offerings and capabilities, IDC has positioned the company in the Leaders category in the 2026 IDC MarketScape for worldwide life sciences R&D strategic consulting services.

Founded in 1983, ZS is privately held and is headquartered out of Illinois, the United States, with 40 offices worldwide, and has over 42 years of experience in working with life sciences companies and over 90% of its revenue comes from the life sciences industry. It provides strategic consulting services to close to 330 customers; two-thirds are biopharma and a fourth are medical device companies. Approximately 60% of its clients are based in the United States and 30% are in Europe; 90% of its customers have revenue of over $1 billion. ZS supports over 3,000 active projects across 190 pharma, including all of the top 50 pharma. It has a dedicated team of over 10,000 life sciences professionals, of which 300 focus on strategic consulting.

In addition:

- **Strategic initiatives:** ZS is investing in *in silico* clinical development to help pharma scale ROI and is planning on deepening engagement with R&D domain leaders but also with enterprise IT and technology organizations to drive cross-functional transformation, and on embedding "patient-centricity" in its strategic frameworks, trial design methodologies, and evidence strategies. It has been building out thought leadership forums with pharma executive leadership. ZS invested $25 million in 2025 toward its R&D and innovation efforts. 5% of its contracts involve risk sharing.
- **M&As and partnerships:** In 2025, ZS acquired Torrent Consulting, a Salesforce consulting partner specializing in multicloud implementations of ZS' healthcare, data, and AI capabilities and driving personalized patient and provider experiences. In 2024, ZS acquired Digital Additive, a Salesforce digital marketing agency to strengthen its end-to-end customer engagement capabilities. In 2025, it also established a partnership with Medidata, bringing together ZS' expertise in life sciences strategy and analytics, end-to-end process engineering, and change management together with Medidata's advanced, cloud-based technology platform. In 2023, it acquired Trials.ai (an intelligent study design company), Intomics (a bioinformatics and systems biology company to strengthen its focus on discovery) in 2022, and Medullan (a digital health company) in 2021. In 2022, it made a

multimillion-dollar investment in IgniteData to scale IgniteData's research automation capabilities and enhance interoperability between electronic health records and electronic data capture (EDC) systems. It has partnerships with Appian, AWS, CluePoints, Databricks, Informatica, Intelligencia.ai, Salesforce, Snowflake, Stratifyd, and Veeva.

- **Pricing models:** ZS offers project-based fixed-fee models, outcomes-based models, a contracting model for agile squads, and a licensing-fee model for its software. For complex projects involving a new domain/methodology/outcome/deliverable, ZS offers a co-investment gain-share model.

Strengths

ZS' key differentiators include its deep domain expertise, strategy-to-execution delivery, and a forward-looking perspective on the future of pharma R&D. ZS partners with over 200 pharma on R&D programs and has developed over 30 R&D technology products and accelerators, including ZAIDYN (its clinical platform for feasibility and enrollment). ZS brings to the table integrated thinking and solutions spanning strategy and transformation, insights and analytics, technology, platform services, and accelerators across the life sciences value chain. Its strategy focuses on four areas — namely, asset maximization, portfolio development, digital and technology, and organization and people. ZS' three priority areas are AI/GenAI, business advisory, and digital transformation. ZS has over 250 people with advanced scientific degrees, and ZS employees have expertise in over 120 disease areas. 20% of its R&D leadership has over 15 years of R&D industry leadership experience.

One of ZS' most complex strategic consulting engagements involved helping a senior, cross-functional team within a top 10 pharma to prioritize therapeutic and disease areas and pathways/MOAs for R&D and BD/M&A investment over the next decade; ZS' published research showing a link between therapeutic area focus (rather than portfolio diversification) and total shareholder return, contributed to ZS' selection for the engagement. ZS collaborated closely with the cross-functional team to help the organization focus on 5 therapeutic areas instead of 12 and established guardrails to enable doubling down on investments in focus areas where the company can have the greatest impact. Thus ZS helped develop an enterprise-level portfolio strategy and a centralized decision-making framework to optimize annual capital allocation and drive toward corporate growth objectives. 25% of R&D spend was reallocated toward a focused set of programs, and shareholder returns doubled since the strategy was rolled out.

The five key use cases where ZS supports its customers with its strategic consulting offering are developing AI road maps and scaling adoption, organization design, portfolio strategy, asset value maximization, and digital strategy and transformation. The three key GenAI use cases where ZS supports the life sciences industry with its strategic consulting offering industry are AI-driven clinical workflow transformation, trial design optimization, and risk-based quality management. The three key agentic AI use cases where ZS supports the life sciences industry with its strategic consulting offering are content authoring, *in silico* and digital twin–driven trial design, and the use of agentic AI in clinical data management — for quality control, data standardization, transformation, and the generation of submission-ready outputs.

"We've been working with them since 2018 and are working with them in six different areas in R&D. The biggest one is where we are building a new capability, related to program feasibility, protocol feasibility, and site feasibility. They do a lot of forecasting for our long-range plan and investment plan, disease landscapes, and competitive landscapes. Our protocols are very complex — they have workflow management integrations. They have data partnerships — bring in country data, epidemiological data. We used Zaidyn — definitely met our needs. They have a great infrastructure in terms of data engineering. You can get this platform up and running in months. Price is an absolute steal — its pennies on the dollar. If there's a question to be asked, they are my go-to, by far the best in my space. In R&D — they are way ahead. Underpromise and overdeliver — they have breadth and depth of knowledge. When it comes to PX — bank of information (patient surveys — their experience in clinical trials) — we are exploring it. They have created a road map for agentic AI implementation — what they are doing with agentic can change how clin ops works. Everything they do has the user lens — I think that will take our industry to a different level. When it comes to UX — they are at the forefront," said the VP, global trial optimization, of a major biopharma.

"ZS has been our partner from the inception in developing the strategy for a very large organizational transformation of about 1,000 people focused on new product development. They helped with the injection of leaders for AI readiness and helped us drive a significant shift on how this organization shows up. They were excellent in operational execution — handled multiple fairly complicated tasks involving things like data integration. They used GenAI to draft new JDs. Close to 100 JDs. Very well done in a very short time — few weeks. I was really impressed. If someone needs a partner to come up with a five-year vision, they are a good choice, to map it, and execute it more or less flawlessly— I think they are a very good partner for that. Very nice people overall — very good team members to work with — a particularly positive experience. Superior, in my experience, as compared with some of the top consulting firms. Some really smart people, with no ego," said the VP of a major global pharma.

Challenges

It is perceived that ZS' performance on strategic consulting projects is stronger on the R&D side, despite being known for having extensive life sciences commercial experience. Sometimes ZS' strategic input comes across as being more heavily focused on execution and it would help if it could be more radical — and profoundly thoughtful, disruptive. Areas where ZS should further strengthen its capabilities in strategic consulting include partner selection and vendor oversight, process optimization, decentralized clinical trials implementation strategy, and translational research strategy.

Consider ZS Associates when

Consider ZS Associates when seeking a partner that has strong strategic consulting capabilities, strong therapeutic area expertise, disease landscapes, trial design, investment planning, robust analytical and data integration, and optimization capabilities. Consider ZS Associates when seeking a partner that has a strong footprint in domain-intensive areas such as global pricing and market access strategy, management consulting for pharma R&D, due diligence and asset valuation, business model innovation, M&A strategy, R&D operating model design and implementation, clinical trial budget management, clinical efficiency and productivity improvement, and predictive modeling.

APPENDIX

Reading an IDC MarketScape graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market definition

This IDC MarketScape evaluates life sciences R&D strategic consulting services capabilities.

For the purpose of this study, strategic consulting is defined broadly to include:

- High-level management consulting and advisory services (including portfolio and other R&D strategy development, new business model assessments and strategies, and globalization strategy development and implementation)
- Data and digital health strategy
- Operation and process optimization development and implementation services (including IT framework development, outsourcing strategies, and organizational change management support)
- Drug development strategy
- Technology adoption and implementation strategy development (including mobile, cloud, Big Data, AI, sustainability, and social communication strategy development)

Market overview

The life sciences industry is navigating a new era of complexity — one defined by the convergence of GenAI, agentic AI, accelerating regulatory transformation and policy changes, geopolitical volatility, and relentless cost-efficiency pressures. These changes are fueling the demand for expert life sciences strategic consulting partners that bring to the table life sciences expertise, AI strategy and execution capabilities, regulatory compliance expertise, and digital transformation leadership.

The evolving trends shaping the life sciences strategic consulting landscape for 2026 include:

- **AI moving from strategy to execution — and the gap is widening.** GenAI and agentic AI are no longer future-state discussions; they're live in R&D workflows across target identification, protocol design, regulatory documentation, and medical writing. The demand has shifted — from "AI strategists" to "AI-to-value translators" that can move organizations from pilots to enterprise impact, driving not only the visioning but also the implementation.
- **Agentic AI as the next inflection point.** While GenAI is now table stakes, agentic AI are the emerging frontier, and this is raising the bar on what clients expect from their advisors — not just AI fluency, but deep familiarity with how to embed these in the workflows while ensuring human-in-the-loop design and how to reengineer business processes and drive regulatory alignment for autonomous systems.
- **Responsible AI and data governance as competitive differentiators.** Life sciences organizations are actively revamping their data strategies and are modernizing their data foundations. Customers are expecting that their strategic consulting partners should bring explainability, model validation frameworks, and compliant AI architectures that align with evolving expectations from the FDA and EMA, and ICH.
- **The confluence of scientific, commercial, and digital strategies.** The traditional handoffs between R&D strategy, commercial planning, and digital transformation is collapsing. There is a growing ask for integrated advice spanning early asset evaluation through launch, with digital infrastructure and data strategy woven throughout — not bolted on at the end. The winners are firms that can credibly operate across all three lanes simultaneously — strategic advisory, technology play, and life sciences domain expertise.
- **The macro pressures reshaping commercial models.** Drug pricing reform (the Inflation Reduction Act [IRA] in the United States), the most favored nation (MFN) drug pricing policy, tariff policy volatility, and recessionary headwinds are tightening R&D budgets and forcing harder portfolio trade-offs. As a result, life sciences companies are demanding more outcome-based and risk-sharing pricing arrangements (gain-share, co-investment models) and are scrutinizing R&D pipeline prioritization more rigorously than ever. Strategic consulting firms that can demonstrate ROI discipline and align their fees to client outcomes are winning.
- **The convergence of business and IT skills.** This continues to intensify as the democratization of AI continues to scale. The industry is seeking to develop a deeper understanding of business-technology nexus needs and is looking for guidance on organizational redesign, and building digital literacy within business functions, at speed. There is a growing expectation that the strategic consulting partner should

serve as a change agent to drive enterprisewide transformation, touching every stakeholder from the C-suite to the bench scientist.

- **The growing importance of "participant centricity" in clinical research.** The needle is moving beyond "patient centricity" to a broader ecosystem of caregivers, sites, and community participants and the life sciences industry is expecting its strategic consulting partners to guide the broader ecosystem narrative.
- **Regulatory-grade evidence and a decentralized clinical trial strategy.** There is a focus not only on implementing decentralized clinical trials but a sharpened appetite to leverage digital biomarkers and decentralized trial data to garner regulatory-grade evidence and to measure ROI from digital investments.
- **Interoperability between EHRs, EDC systems, and sponsor platforms.** This remains a high-priority investment area, requiring strategic consulting partners to provide both technical expertise and regulatory depth.
- **Shifting multiyear technology refresh cycle, managing cybersecurity risks.** These factors present challenges to strategic consulting service providers in terms of talent sourcing, niche capability development, and contract structuring.
- **Scaling diversity, equity, and sustainability.** A growing expectation in the life sciences industry is that SC partners help embed these principles into R&D design, clinical recruitment, and innovation strategy.
- **Growing focus on leveraging technology to improve the probability of technical and regulatory success (PTRS).** Strategic consulting partners are being asked to bring in domain expertise and leverage predictive analytics for AI-driven compound screening, ML-guided protocol design, and portfolio optimization.
- **The rise and rise of cell and gene therapy (CGT).** There are over 4,000 cell, gene, and RNA therapies currently in clinical and preclinical pipelines globally, and this is creating a demand for specialized strategic consulting expertise in advanced therapy operating models, regulatory strategy, and commercialization pathways.

LEARN MORE

Related research

- *IDC Survey: Investment Strategies and the Adoption of AI Agents and Gen AI in the Life Sciences Industry* (forthcoming)
- *From Pipettes to Playbooks: How AI Agents Are Rewiring the Life Sciences Workforce* (IDC #US54407126, March 2026)
- *Smart Agents, Smarter Science* (IDC #US53889525, November 2025)
- *IDC FutureScape: Worldwide Life Sciences 2026 Predictions* (IDC #US53855625, October 2025)

- *IDC MarketScape: Worldwide Life Sciences R&D AI (Including GenAI) in Clinical Trials 2025 Vendor Assessment* (IDC #US53704325, August 2025)
- *IDC MaturityScape Benchmark: AI-Fueled Life Sciences Organization Worldwide, 2025* (IDC #US53345625, May 2025)
- *IDC MarketScape: Worldwide Life Science R&D Strategic Consulting Services 2023 Vendor Assessment* (IDC #US49950023, December 2023)

Synopsis

This IDC Health Insights study is a refresher of the life sciences R&D IDC MarketScape, which has a specific focus on strategic consulting in the life sciences R&D space. This document seeks to compare major service providers with each other based on criteria that should be important to life sciences companies when considering the selection of a strategic consulting partner to help provide guidance for strategic, operational, and tactical transformation issues within the R&D space. The IDC MarketScape assessment of strategic consulting outsourcing in life sciences R&D was previously performed in 2011, 2014, 2016, 2018, 2021, and 2023.

"The life sciences strategic consulting market is undergoing a fundamental reset — driven by the convergence of agentic AI, mounting execution pressure, and a sharply more demanding buyer. Organizations are seeking business transformation partners that can close the AI-to-value gap, navigate regulatory complexity, and align their commercial models to client outcomes. The firms that can bridge a blend of scientific depth, digital fluency, organizational change capability, and a willingness to share risk will define the next era of strategic consulting," said Dr. Nimita Limaye, research VP, Life Sciences R&D Strategy and Technology, IDC Health Insights.

ABOUT IDC

International Data Corporation (IDC) is the premier global market intelligence, data, and events provider for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries. IDC's analysis and insight help IT professionals, business executives, and the investment community make fact-based technology decisions and achieve their key business objectives.

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