IDC MarketScape

IDC MarketScape: Worldwide Life Sciences R&D RWD/RWE for Data Platforms, Technology Solutions, and Consulting Services 2026 Vendor Assessment

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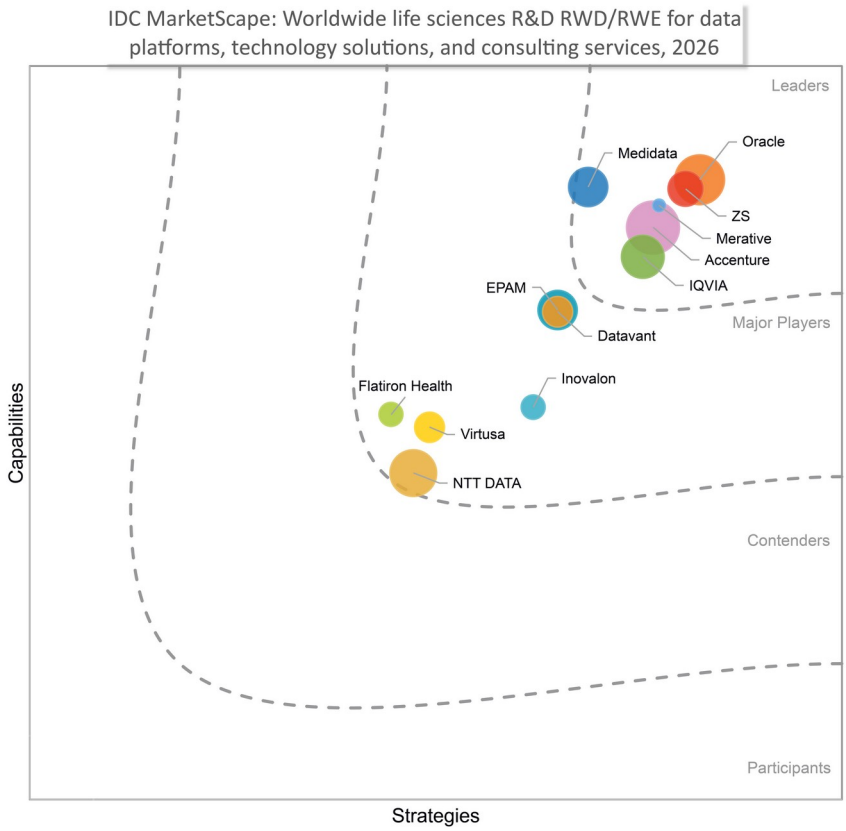
THIS EXCERPT FEATURES ZS AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape: Worldwide life sciences R&D RWD/RWE for data platforms, technology solutions, and consulting services



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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: IDC MarketScape: Worldwide Life Sciences R&D RWD/RWE for Data Platforms, Technology Solutions, and Consulting Services 2026 Vendor Assessment (Doc # US54122226).

IDC OPINION

The real-world data (RWD) and real-world evidence (RWE) market has moved firmly from proof of concept to enterprise mandate. Life sciences R&D organizations are no longer debating whether to invest in RWD/RWE; they are focusing on scaling it responsibly, quickly, and in a way that stands up to regulatory and payer scrutiny. Technology and consulting providers in this space report accelerating demand across the full spectrum of need, from foundational data sourcing, integration, and standardization to scientific and regulatory-grade evidence generation, to enterprise-level strategic consulting and capability building.

GenAI and increasingly agentic AI are becoming the connective tissue across nearly every life sciences company's road map, whether it is used to accelerate the curation of unstructured electronic health record (EHR) data, automate cohort and code-list generation, power synthetic control arms and digital twins, or scale quality control across billions of records. At the same time, the fundamentals that have long challenged this market — fragmented data access, inconsistent data quality, and the difficulty of proving that a data asset is truly "fit for purpose" — remain stubbornly persistent even as the tools available to address them mature.

Key challenges facing the RWD/RWE industry

The top challenges that the life sciences industry is facing in implementing an RWD/RWE strategy include:

- **Fragmented, siloed data and access complexity.** RWD often sits in isolated systems and disparate third-party sources spanning R&D, medical affairs, and commercial functions. Pharma companies struggle to identify, license, and combine the right assets, a challenge compounded when data models differ across vendors and when critical clinical detail is locked in unstructured notes, imaging, or genomics.
- **Data quality, completeness, and fitness for purpose.** RWD is inherently messy and heterogeneous, and there is an ongoing battle to establish whether a given data set is fit for purpose for a specific scientific or regulatory question, particularly for rare

tumor types, novel biomarker-defined populations, or patient populations outside North America and Europe.

- **Evolving regulatory and methodological expectations.** Regulators and health technology assessment (HTA) bodies are increasing scrutiny of transparency, bias mitigation, and reproducibility, so customers must continuously adapt documentation and quality frameworks to keep pace. Translating strategic business questions into robust, regulator-ready study designs remains a persistent hurdle.
- **Organizational and operational scale.** Many biopharma companies still lack the internal infrastructure, data science talent, and coordinated enterprise strategy needed to operationalize RWE at scale, resulting in duplicative vendor relationships, inconsistent standards, and use-case-by-use-case initiatives rather than a coordinated data strategy.
- **Budget, ROI, and change management.** Customers often seek transformative, AI-enabled outcomes without the budget or organizational buy-in to match, making it difficult for vendors and buyers to build a durable business case for sustained investment.

Emerging trends and how solution providers are responding

Technology and consulting solution providers are converging on a common playbook to respond to the challenges above, even as they differentiate themselves and outline their unique value propositions. Four trends stand out:

- **Vendors are shifting from point solutions to integrated, end-to-end platforms.** Vendors increasingly position themselves around full-life-cycle capability, spanning data acquisition, standardization (frequently around the common data model of the Observational Medical Outcomes Partnership [OMOP]), tokenization and linkage, analytics, and regulatory-grade evidence generation, rather than with single-purpose data or analytics tools. Differentiation increasingly rests on the ability to combine proprietary data, engineering scale, and deep scientific and epidemiological expertise within an integrated offering.
- **Business models are diversifying and blending.** Vendors report leveraging combinations of data-as-a-product (DaaP), data-as-a-service (DaaS), insights-as-a-service, and platform-as-a-service (PaaS) models, often layering managed services/consortium/network participation models on top. Rather than a dominant model, the market is settling into hybrid constructs tailored to the customer's maturity and use case.
- **Pricing is shifting toward flexibility, outcomes, and value**. Alongside traditional time-and-materials and fixed-fee arrangements, there is a clear evolution toward value-based and milestone-based pricing. AI and automation are improving delivery

efficiency, which in turn is making outcome- and performance-linked pricing more viable, particularly in larger, more complex engagements.

- **Competitive differentiation is consolidating around data depth, regulatory credibility, and platform scale.** The depth and traceability of RWD, demonstrated regulatory and HTA acceptance (publications, FDA collaborations, regulatory decisions influenced), and the ability to operate AI-native, standardized platforms at global scale are driving competitive differentiation. To defend their position, vendors are investing further in data partnerships, proprietary AI/ML tooling, and standardization leadership in compliance with OMOP, the Observational Health Data Sciences and Informatics (OHDSI), the Data Analysis and Real-World Interrogation Network (DARWIN EU), and the European Health Data & Evidence Network (EHDEN).

Use cases driving demand for RWD/RWE consulting and solutions

The life sciences industry has a consistent ask, spanning three layers of the evidence value chain, plus function-specific needs that cut across all three:

- **Data strategy, sourcing, and integration (the technical foundation).** The life sciences industry needs further help in building end-to-end data road maps: identifying and contracting for fit-for-purpose RWD, implementing scalable common data models, and building the tokenization, linkage, and remediation pipelines that turn raw, disparate sources into analytic-ready, decision-grade data assets.
- **RWE generation and analytics for scientific, regulatory, and safety use cases (the evidence generation layer).** A second major cluster of demand centers on translating that data into evidence: epidemiology, safety, and comparative effectiveness studies; feasibility and fit-for-purpose assessments; and regulator-grade RWE for submissions, label expansions, external comparators, and HTA dossiers, as well as post-market safety surveillance.
- **Strategic consulting, operating model design, and capability building (the strategy development layer).** An increasingly prominent enterprise-level ask is in defining RWD/RWE strategy and governance, designing operating models and ecosystem partnerships, building internal capability (including AI and RWD use case and business case development), and running the change management needed to scale RWE as a coordinated enterprise function rather than a series of one-off studies.
- **Function-specific support across the R&D value chain**. Beyond the three horizontal layers, different teams indicate distinct demands. Clinical development teams need to optimize trial design and feasibility using RWD; medical affairs, RWE, and health economics and outcomes research (HEOR) teams require comparative effectiveness research and payer/market access evidence; and commercial teams

currently lack competitive intelligence and launch-performance monitoring. This reflects how deeply RWD/RWE has been embedded across the enterprise.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

IDC frequently has unique visibility into vendor selection processes within life sciences companies through clients and contacts across 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 space. The key inclusion criteria were:

- The vendors must have had at least five customers for their RWD/RWE offering for a duration of at least 12 months as of January 1, 2026.
- The vendors must provide platforms, technology solutions, and/or services that enable the use of RWD/RWE.
- The vendor must have guided customers on the use of RWD/RWE, including choosing the right data assets; defining the right business models; data integration and optimization strategies; technology implementation strategy; RWE strategy and evidence planning; or other consulting activities related to the use of RWD/RWE.
- The vendor must have a minimum revenue of $300 million.

Further research and due diligence were then conducted to narrow the list of vendors to only those that IDC views as legitimate contenders for future deals within the life sciences R&D real-world evidence, data, platforms, technologies, and consulting space. The 12 vendors selected to participate in this study are:

- Accenture
- Datavant
- EPAM
- Flatiron Health
- Inovalon
- IQVIA
- Medidata Solutions
- Merative
- NTT DATA
- Oracle
- Virtusa
- ZS

ADVICE FOR TECHNOLOGY LEADERS

It is now well established that effectively leveraging RWD/RWE provides a significant competitive advantage. As AI reshapes what is possible with RWD, the life sciences industry is racing to partner with the right players, build the right internal skills, and put the right guardrails in place. IDC recommends that technology buyers:

- Architect an enterprise-wide, scalable, and flexible RWD/RWE strategy, and build the infrastructure to support a five-year road map rather than a single study.
- Establish clear data governance models and guardrails to ensure compliance with evolving data security, privacy, and sovereignty regulations across geographies.
- Prioritize partners that can demonstrate a standardized, interoperable data foundation (e.g., OMOP/OHDSI alignment) rather than proprietary silos, to maximize reuse across studies and programs.
- Evaluate a data partner's ecosystem and partnership breadth, not just its proprietary assets, since most vendors now lean on federated networks and consortium models to broaden reach.
- Choose partners that can be transparent about how their insights are derived, to support publications, regulatory submissions, and HTA dossiers.
- Assess a vendor's regulatory track record and willingness to engage directly with regulators, not just its data volume.
- Identify and prioritize the right use cases and business models (DaaP, DaaS, insights-as-a-service, PaaS, or managed services/consortium models) rather than defaulting to a single commercial construct.
- Push vendors on flexible, outcome- and value-based pricing, particularly as AI-driven efficiency makes performance-linked models more viable.
- Build empowered "data citizens" internally: invest in the internal skills needed to manage RWD and to engage effectively with strategic partners, rather than relying solely on external vendors.
- Build a collaborative ecosystem of data partners; no single vendor has it all, and blended, multi-partner strategies are increasingly the norm.
- Establish a tokenization and linkage strategy early and identify partners that can support it at scale.
- Explore synthetic data and synthetic control arms to complement, not replace, real-world data, particularly for rare-disease and oncology use cases.
- Leverage generative AI to accelerate data curation, cohort design, and evidence generation, but insist on human-in-the-loop validation and clear quality-control processes.

- Engage early and often with regulators and choose partners that can help you do so.
- Remember that a digital strategy will not be effective without a well-defined, well-governed data strategy.

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 criterion outlined in the Appendix, the description here provides a summary of each vendor's strengths and opportunities.

ZS

After a close evaluation of ZS' offerings and capabilities, IDC has positioned the company in the Leaders category in the 2026 IDC MarketScape for worldwide life sciences R&D RWD/RWE for data platforms, technology solutions, and consulting services.

Founded in 1983 and headquartered in Evanston, Illinois, ZS operates in over 40 offices worldwide, employing around 16,000 people. It has been offering RWD/RWE solutions for the past two decades and serves about 250 RWD/RWE customers: two-thirds are pharma and over a fourth are medical device firms. ZS counts all top 20 global pharma among its clients. Two-thirds of its RWD/RWE customers are based in North America and a fifth are based in Europe. About 90% of its customers have revenues of over $1 billion.

Strategic initiatives

ZS' vision is to focus on novel approaches to access data that generates differentiated endpoints, to scale the use of agentic AI across the evidence generation continuum, and to position itself as an end-to-end value chain partner that turns RWD into decision-grade evidence. It is creating an ecosystem of partnerships to drive regulatory and commercial outcomes as well as strategic beachheads in the medtech regulatory and payer spaces. It is also expanding RWD access in Europe. Its vision is to create a new mindset around pulling differentiated evidence planning and generation earlier in the product life cycle to increase the strategic impact of evidence generation. ZS invested $30 million in 2025 toward RWD/RWE.

M&As/partnerships

ZS' acquisitions include Torrent Consulting (2025, a Salesforce multi-cloud implementation partner), Digital Additive (2024, Salesforce digital marketing agency), Trials.ai (2023, AI-enabled study design), Intomics (2022, bioinformatics for drug discovery), and Medullan (2021, a digital health company, now rebranded as ZS VARA. It also forged partnerships with Medidata and eClinical Solutions in 2025. Other key partnerships include those with

Intelligencia.ai (AI-driven clinical development risk assessment), IgniteData (EHR-to-EDC interoperability), Salesforce, and Databricks (ZS was named Databricks' 2025 Life Sciences Partner of the Year).

Pricing models

ZS uses project-based fixed-cost pricing, outcomes-based pricing for large multiyear relationships, licensing for software/platform use, capacity-based pricing for agile squads, and program-based models for engagements with multiple scope elements bundled together.

Strengths

ZS is a global management consulting and technology firm specializing in sales and marketing strategy, data analytics, and healthcare consulting. ZS' RWD/RWE team includes about 540 resources, including 427 data scientists and 10 epidemiologists.

ZS' key differentiators include the following:

- ZS continues to scale its integrated Medical & Evidence practice that delivers connected medical, RWE, and HEOR strategies to accelerate decision-making.
- The vendor connects evidence generation to downstream dissemination, ensuring that the data that is generated supports publications, congress strategies, and field medical execution.
- ZS offers ZAIDYN Medical (its medical intelligence platform), which features OLI for Opinion Leader Intelligence, CGI for Care Gap Intelligence, SMI for Scientific Medical Intelligence, MCE for Medical Customer Engagement for medical science liaisons (MSLs), and POI for Patient Outcomes Impact analysis.
- ZS' AI-enabled Patient Radar platform identifies hard-to-find rare-disease patients and physicians. ZS reports that it helped accurately diagnose 26 new patients in 12 months for a rare disease organization.
- In Europe, ZS Data Nexus is a proprietary, regulatory-grade RWD access platform, the first RWE solution to achieve Europrivacy certification.
- ZS reports 90% NPS and 97% retention for its RWD/RWE work.
- Its most differentiated asset is the digital Integrated Evidence Planning (IEP) capability, delivered through ZS Evidence Pro. With over 250 IEPs delivered, ZS reports that IEP development time was reduced from 4-5 months per IEP to generating over 30 IEPs in 10 weeks, with a 75% acceptance rate for over 20 protocol recommendations.
- ZS reports that it supported a rare disease biopharma with its end-to-end RWE strategy. Its multidisciplinary team worked across 10 ultra-rare immunology and neurology indications and published 10 manuscripts.

- ZS has partnerships for medtech regulatory strategy with the FDA-incubated not-for-profit entity NESTcc, and for payer evidence co-creation with Arine, which uses its AI-driven platform to unlock claims and outcomes data.
- Its flexible working model enables ZS to work as a strategic consulting advisor, a client capability builder, or an outsourcing partner, as needed.

"ZS helped us assess our current data landscape. It performed a gap analysis across our current oncology portfolio, mapped the right data sources, and identified the RWD providers. I am generally very satisfied with the service that ZS has provided. Very agile, responsive, collaborative, very proactive in bringing new ideas. They are a mix of a traditional consulting org and more of an analysis type as well," said the RWE/HEOR lead of a global biopharma.

"We wanted to launch a drug. We worked with them on claims, medical records, and registry data. Their upfront understanding of how to work with this type of data has definitely been their strength. They could recommend which data source would be perfect for our needs. They were responsive — we never had to make the same complaint twice. Bring in new resources quickly. They can work across the value chain. What worked well for us was that they felt like part of the team. They did the highest-quality work within the strategy that we were working on, and worked in a really collegial way," said the VP for HEOR of a global biotech.

Challenges

ZS' evidence generation business is growing faster than the firm's overall growth rate, creating pressure to build a talent pipeline fast enough to keep pace. Because ZS does not own RWD data sets itself, it depends on its data partnerships, requiring continuous vendor evaluation to keep sourcing fit-for-purpose data. ZS remains better known for its commercial than for its R&D/medical and RWE work. It must continue to invest in scaling its HEOR scientific expertise to drive the right balance of subject matter expertise and consultative skills.

Consider ZS when

ZS is best suited for organizations that want a single, cross-functional partner that offers industry experts as well as platform and technology solutions, to connect evidence strategy, HEOR, and regulatory RWE. It is particularly suited to those trying to mature their integrated evidence planning process or piloting agentic-AI-enabled evidence workflows. This capability is complemented by ZS' portfolio of data partnerships, and key partnerships to scale medtech and payer evidence strategy.

- **Should ZS be considered an RWD provider?** No. ZS does not report owning or licensing RWD data sets itself; it operates as a data-agnostic advisor across 200 external data partnerships.

- **Should ZS be considered an RWD/RWE consulting services provider?** Yes. This is ZS' core strength, spanning integrated evidence strategy and planning, HEOR, and regulatory RWE, backed by 540 dedicated RWD/RWE staff.
- **Should ZS be considered an RWD platform and technology solutions provider?** Yes. ZS offers a growing technology stack, including ZS Evidence Pro, Patient Radar, and ZS Data Nexus for EU regulatory-grade RWD access.

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 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 to provide an accurate and consistent assessment of each vendor's characteristics, behavior and capability.

Market definition

For the purposes of this study, IDC follows the FDA definition of real-world data (RWD) and real-world evidence (RWE). RWD is data relating to patient health status and/or the delivery

of healthcare routinely collected from a variety of sources, and RWE is the clinical evidence regarding a medical product's use and potential benefits or risks derived from analysis of RWD. This IDC MarketScape evaluates real-world evidence, real-world data, platforms, technologies, and consulting services capabilities.

Market analysis

RWD has become so deeply embedded in life sciences R&D that it now constitutes a separate industry, spanning very large, mature data and technology providers; specialized data and analytics companies; global systems integrators and consultancies; and a long tail of niche start-ups offering specific data sets, standardization tooling, or AI-enabled curation. The lines between "data vendor," "platform," "consultancy," and "technology partner" continue to blur, and most vendors evaluated in this study now describe themselves as spanning more than one of these categories.

The industry's transformational journey includes the following:

- The center of gravity is shifting from DaaP toward integrated, end-to-end platforms that combine data, standardization, tokenization/linkage, analytics, and consulting, delivered through hybrid business models spanning DaaP, DaaS, insights as a service, PaaS, and managed or consortium services.
- Vendors are converging around common data models, most notably OMOP and OHDSI, and are actively participating in federated research networks such as DARWIN EU, EHDEN, and OHDSI to enable multicountry, privacy-preserving analytics without centralizing data.
- AI and GenAI are now embedded across the value chain: in cohort and code-list generation, unstructured EHR and document extraction, automated data quality and observability, and synthetic data and digital twins used for protocol optimization, synthetic control arms, and trial simulation.
- Synthetic data is moving from experimental to operational for some vendors, with reported customer counts still ranging from single digits to the dozens, and are concentrated in oncology and rare-disease control-arm use cases and pre-licensing feasibility assessment.
- Pricing models are diversifying beyond time-and-materials and fixed fees toward value-based, milestone-based, and usage- or capacity-based constructs, with several vendors explicitly linking AI-driven delivery efficiency to more flexible, outcome-oriented commercial terms.
- Competitive dynamics vary by deal type: data-resourcing deals draw competition from large proprietary data holders; strategic and advisory deals draw competition from global consultancies and technology-driven data companies; and clinical-trial-

adjacent deals draw competition from CROs. Vendors are increasingly partnering across these categories rather than competing head to head in all three.

- Investment in R&D and innovation remains uneven, ranging from vendors investing single-digit millions to those investing well over half a billion dollars annually, inclusive of strategic acquisitions. This underscores how fragmented the competitive landscape remains even as scale becomes more important to winning enterprise-level engagements.
- Talent, particularly the combination of epidemiology, data engineering, regulatory science, and AI expertise, is emerging as a gating factor for scaling the RWD/RWE offering.
- Buyers increasingly expect vendors to act as strategic partners across the full R&D life cycle rather than point-in-time data suppliers. This reflects growing demand for operating model design, governance frameworks, and capability-building support alongside traditional data and analytics delivery.

LEARN MORE

Related research

- *IDC Survey: Early Adopters of Functional Agentic AI in Life Sciences Survey, 2026* (IDC #US54793126, August 2026)
- *IDC Survey: Strategic Priorities, Business Impact, and Investment Strategies for GenAI and Agentic AI in the Life Sciences Industry, 2026* (IDC #US54797926, August 2026)
- *IDC Survey: Governance, Technology, and Implementation Readiness for the Adoption of AI Agents and GenAI in the Life Sciences Industry, 2026* (IDC #US54798026, August 2026)
- *SCOPE X's AI in Clinical Trials, Venture Bets, and Bio-IT Breakthroughs!* (IDC #US54593826, June 2026)
- *NVIDIA GTC: The Tokenization of Life Sciences and Healthcare* (IDC #US54456026, April 2026)
- *Vendors to Watch for Real-World Evidence, Data, Platforms, Technologies, and Consulting Services* (IDC #US52303723, June 2024)
- *IDC MarketScape: Worldwide Life Science R&D RWE, RWD, Platforms, Technologies, and Consulting Services 2023 Vendor Assessment* (IDC #US51186723, September 2023)
- *Real-World Evidence, Social Determinants of Health, and Digital Biomarkers in Driving Patient Recruitment* (IDC #US50382823, March 2023)

Synopsis

This IDC study presents an IDC MarketScape assessment of the worldwide life sciences R&D RWE, RWD, platforms, technologies, and consulting services market. It evaluates the strategies and capabilities of key vendors in this space and represents a qualitative and quantitative assessment based on criteria that should be important to life science companies when considering the selection of an RWD/RWE technology solution provider. As data volumes explode, AI reshapes what is possible, and regulators lean further into RWE, this study captures an industry in the midst of a decisive shift from experimentation to enterprise-scale execution. This is the second time that an IDC MarketScape assessment on this topic in life sciences has been performed.

"Real-world data has quietly become the connective tissue of modern drug development. As data volumes explode, AI reshapes the art of the possible for evidence generation, and regulators lean further into RWE, the life sciences industry is undergoing a decisive shift from experimentation to enterprise-scale execution. Those who can exponentially accelerate the transformation of data into evidence that regulators trust, payers accept, and patients ultimately benefit from, will win," said Dr. Nimita Limaye, research VP, Life Sciences R&D Strategy and Technology, IDC.

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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