ïSG Provider Lens™

Specialty Analytics Services — Life Sciences and Healthcare

A report comparing provider strengths and challenges
to aid decision-makers in analytics services

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The life sciences and healthcare industry is undergoing a transformation through the integration of data and AI into its processes and the overall ecosystem. This transformation includes unlocking the value of data across the entire value chain, from R&D and clinical trials to commercialization and patient engagement. NextGenAI applications are targeted to solve verticalized use cases, elevating disease management, treatment pathways and patient experiences. These roles include derisking drug discovery, accelerating clinical development, improving sales force effectiveness, conducting commercial analytics and reimagining patient outcomes. The use of clinical and patient data and emergence of cognitive AI algorithms enable healthcare firms to accelerate innovation, enhance risk management and improve overall ROI.

Healthcare providers and payers are pursuing operational excellence and positive treatment outcomes by investing in data and AI. This segment actively seeks emerging AI applications related to improved user engagement and preventive health programs.

Despite the challenges related to data privacy and security, the adoption of data and AI continues to be a strategic priority for industry leaders. Increased awareness of regulations governing clinical data has prompted healthcare firms to adopt stringent data compliance and access measures. Leading enterprises in this domain increasingly view outsourcing as a knowledge powerhouse and strategic AI partner for leveraging data and AI to streamline value chain activities for efficient operations planning and improved R&D and patient experiences.

Specialty Analytics Services - Life Sciences and Healthcare 2025 — Deep View

Legend: ■ Commercialization ■ Life Sciences Clusters ■ Healthcare Clusters ■ Workloads and Use cases ■ Enablers

Clinical and Diagnostics Analytics
- Clinical Trial Analytics
- Disease Management
- Rare Disease and Diagnostic Analytics
- Genomic Analytics
- Clinical Research and Decision Support
- Pharmacological Analytics
- Treatment Pathway Analysis
- Predictive Disease Detection
- Pharma and Biopharma Intelligence
- Adverse Event Forecasting and Reporting

Drug Development Analytics
- Formulation Development
- Drug Discovery and Safety
- Drug Potency Analysis
- Drug Prescription Prediction and Analysis

Devices and Ecosystem Analytics
- Connected Research and Digital Health
- Telehealth Analytics
- Population Health Analytics
- Predictive Healthcare Analytics Platforms
- Image Recognition and Analytics
- Medical Devices Life Prediction

Patient Analytics
- Patient Data and Segmentation
- Patient Health Monitoring Dashboard
- Remote Patient Monitoring as-a-Service
- Patient Journey Mapping and Flow Modeling
- Healthcare Professional (HCP) Targeting and Engagement
- Patient Intelligence and Analytics
- Recommendation Systems
- Digital Patient Experience Services
- Prescriber Journey

Healthcare Providers and Payers Analytics
- Operational Analytics
- Hospital Performance Dashboard
- Hospital Command Center
- Healthcare Knowledge Systems
- Pharmacy Sales and Inventory
- Health Plan Analytics
- Policy Impact Analysis
- Sales and Marketing

Commercialization Analytics
- Market Access and Value-based Pricing
- Territory Alignment Analytics
- Sales Force Effectiveness (SFE)
- Segmentation and Targeting
- HCP Engagement Analytics
- Prescription Pattern Analysis

Enablers
- Innovation (IP – Accelerators)
- Partnerships (Tiers – Types)
- Competency and Talent (Resources – Certifications)
- Industry Expertise
- Experience and Engagement

The study reveals **evolving market trends** and **competitive dynamics** for **life sciences and healthcare analytics** service providers in 2025.

Simplified Illustration Source: ISG 2025

Specialty Analytics Services — Life Sciences and Healthcare

Definition

The ISG Provider Lens™ Specialty Analytics Services — Life Sciences and Healthcare 2025 study offers the following to business and IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers on their competitive strengths and portfolio attractiveness
- Focus on the global market

Our study serves as an important decision-making basis for positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current vendor relationships and potential engagements.

Specialty Analytics Services — Life Sciences and Healthcare

Definition

In this quadrant, ISG evaluates AI and analytics service providers integrating scientific methods with business context to help life sciences and healthcare clients resolve business challenges using AI technologies such as computer vision, NLP and GenAI. The objective is to develop, deploy and maintain AI solutions for life sciences and healthcare companies across the value chain, focusing on enhancing operational efficiency, minimizing adverse events and improving performance metrics. These solutions utilize secure and compliant clinical and drug research data to optimize drug delivery and treatment results.

Providers should demonstrate AI capabilities and expertise in transforming decision-making across the life sciences and healthcare value chain. These capabilities include clinical, diagnostics, therapeutics, drug development and commercialization, connected research, medical imaging, hospital operations, payer analytics and population health management.

Large service providers, analytics platform vendors with life sciences and healthcare modules, and verticalized platform vendors with analytics solutions are not considered in this quadrant.

Eligibility Criteria

Providers need to have one or more of the following:

1. Build and manage robust data architecture and storage for **highly compliant clinical and research data**

2. Use AI to improve **clinical research programs,** ensure **early detection of prescription and treatment patterns, and accelerate the time to market**

3. Possess expertise in utilizing cognitive intelligence to **augment the drug discovery and development process** and seamlessly **manage and monitor patient medical data** to identify patterns for timely decision-making, resulting in improved patient safety

4. Demonstrate capabilities in developing analytics and AI solutions in **clinical and connected research, diagnostics and commercialization,** including trials, genomics, therapeutics, market access and pharma intelligence

5. Exhibit competence in AI-led transformation for **healthcare payors and providers,** specifically in operations, health plans and pharmacy inventory

Quadrants by Region

As a part of this ISG Provider Lens™ quadrant study, we are introducing the following quadrant on Specialty Analytics Services — Life Sciences and Healthcare:

Quadrant	Global
Specialty Analytics Services – Life Sciences and Healthcare	✔

Schedule

The research phase falls in the period between March and July 2025, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in September 2025.

Milestones	Beginning	End
Survey Launch	March 5, 2025	
Survey Phase	March 5, 2025	June 13, 2025
Sneak Previews	July 2025	August 2025
Press Release & Publication	September 2025	

Collecting client testimonials via the Star of Excellence™ Program requires early client referrals (no official reference needed) because CX scores have a direct influence on the provider's position in the IPL quadrant and the awards.

Please refer to the link to view/download the ISG Provider Lens™ 2025 research agenda.

Access to Online Portal

You can view/download the questionnaire from here using the credentials you have already created or refer to the instructions in the invitation email to generate a new password. We look forward to your participation!

Buyers Guide

ISG Software Research, formerly "Ventana Research," offers market insights by evaluating technology providers and products through its Buyers Guides. The findings are drawn from the research-based analysis of product and customer experience categories, ranking and rating software providers and products to help facilitate informed decision-making and selection processes for technology.

In the course of the Specialty Analytics Services — Life Sciences and Healthcare IPL launch, we want to take advantage of the opportunity to draw your attention to related research and insights that ISG Research will publish in 2025. For more information, refer to the Buyers Guide research schedule.

Research Production Disclaimer:

ISG collects data for the purposes of conducting research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.

ISG Star of Excellence™ – Call for nominations

The Star of Excellence is an independent recognition of excellent service delivery based on the Voice of the Customer concept. ISG has designed the Star of Excellence program to collect client feedback about service providers' success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts are continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in its practitioner-led consulting approach.

Providers are invited to nominate their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

Our vision for the Star of Excellence™ is to become acknowledged as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement, please use the "Nominate (for Providers)" section on the Star of Excellence website.

We have set up an email where you can direct any questions or provide comments. This email will be checked daily. Please allow up to 24 hours for a reply.

Here is the email address:
ISG.star@isg-one.com

ISG Star of Excellence

The ISG Provider Lens 2025 – Specialty Analytics Services — Life Sciences and Healthcare 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.

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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 March 2025, 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.

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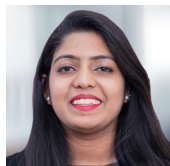**Research Specialist and Co-Author**

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ISG Provider Lens™ Advisors Involvement Program

ISG Provider Lens offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three consultant advisors participate as part of each study's quality and consistency review process. The consultant advisors ensure each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the consultant advisors' group and contribute at different levels depending on their availability and expertise.

The consultant advisors:

- Help define and validate quadrants and questionnaires,

- Advise on service provider inclusion, participate in briefing calls,

- Give their perspectives on service provider ratings and review report drafts.

ISG Advisors to this study

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Invited Companies

If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

*Rated in previous iteration

66Degrees	Evalueserve	Lingaro	Quantiphi*
84.51°	Factspan*	Marlabs*	Rancho Biosciences
Affine	Forian	MathCo*	SG Analytics*
Agilisium*	Fractal Analytics*	Mosaic Data Science*	Sigmoid
Alexander Thamm	Fresh Gravity	Mu Sigma	Stratlytics
Analytics8*	Ganit Inc	Navikenz*	Techvantage Systems
Apexon	Hansa Cequity	Neolytix	ThirdEye Data
Aptus Data Labs	HARMAN*	Network Science	ThoughtSphere
Axtria*	HTC Global Services	Nexocode	Tiger Analytics
Brillio	InData Labs*	N-iX	Tredence
CitiusTech*	Infocepts*	Perceptive Analytics	Virtusa*
C5i	Innova solutions	phData	Visionet
Crunch Analytics	Innover Digital	Polestar Solutions	WNS Analytics
Data41	Intuceo*	Predik Data	ZS Associates*
DataForest.AI	Latentview Analytics	Prowesstics	

ISG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens™ research, please visit this webpage.

ISG Research™

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

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

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

ISG

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

The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

ISG Provider Lens™

MARCH, 2025

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