Everest Group®

Everest Group Pharmaceutical R&D IT Services PEAK Matrix® Assessment 2026

Focus on TCS
October 2026

PEAK MATRIX®

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Introduction

Pharmaceutical enterprises are under increasing pressure to improve R&D productivity amid rising development costs, growing scientific and therapeutic complexity, and persistently long development timelines. At the same time, rapid advances in Artificial Intelligence (AI), generative AI, agentic AI, scientific computing, and automation are creating new opportunities to accelerate discovery and clinical development, enhance scientific decision-making, and streamline labor-intensive R&D workflows. However, fragmented data and technology environments across laboratories, clinical development, safety, regulatory, and quality functions, coupled with stringent requirements around data integrity, validation, explainability, and human oversight, continue to constrain enterprise-scale adoption.

In this environment, technology capabilities alone are insufficient. Deep scientific and functional domain expertise is critical to translate technology into science-led decision-making, embed intelligence across complex R&D workflows, and ensure that solutions remain fit for regulated environments. This is leading to heightened expectations among pharmaceutical buyers, that are increasingly prioritizing service providers that combine deep scientific domain expertise with strong data, AI, and platform capabilities to translate technology investments into faster, higher-quality R&D decision-making.

In the research, we present an assessment of 34 service providers featured on the Pharmaceutical R&D IT Services PEAK Matrix® Assessment 2026. The assessment is based on Everest Group's annual RFI process for the calendar year 2025, interactions with leading R&D service providers, client reference checks, and an ongoing analysis of the pharmaceutical R&D services market.

The full report includes the profiles of the following 34 leading R&D IT service providers featured on the Pharmaceutical R&D IT Services PEAK Matrix® Assessment 2026:

- **Leaders:** Accenture, Capgemini, Cognizant, Deloitte, Excelra, HCLTech, Infosys, TCS, and Zifo
- **Major Contenders:** Apexon, Astrix, Atos, Brillio, CitiusTech, EPAM, IBM, LTM, Nagarro, NNIT, NTT DATA, Persistent Systems, Quantori, Tech Mahindra, USDM Life Sciences, UST, Virtusa, Wipro, and ZS Associates
- **Aspirants:** Altimetrik, DXC Technologies, Emids, Epista Life Science, Orion Innovation, and Zensar

Scope of this report

Geography: global

Industry: biopharmaceutical

Services: R&D IT services

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Scope of the research

[NOT EXHAUSTIVE]

Pharmaceutical R&D value chain

1. R&D operations enablement

- Portfolio, program, and resource planning
- External innovation and partner management
- Digital lab operations and scientific asset management
- IP life cycle management
- Clinical supply chain planning and forecasting
- R&D logistics and inventory management

2. Discovery and early research

- Target identification, biological validation, and in-silico screening
- Compound library and research asset management
- Hit-to-lead analytics and prioritization
- Lead optimization and multiparameter analysis
- Mechanistic modeling and simulation

3. Preclinical research

- Preclinical study planning, scheduling, and execution
- GLP analytics, assay development, and bioanalysis
- Toxicology, pharmacology, and data management
- IND-enabling documentation and study preparation
- Preclinical data integration and translational research

4. Clinical development

- Protocol design and feasibility analytics
- Patient recruitment
- Study start-up
- Study conduct and monitoring
- Project management
- Clinical data management
- Biostatistics and reporting
- Trial close-out, archival, and submission management

5. Safety/Pharmacovigilance

- Case intake, triage, and ICSR processing
- Aggregate reporting
- Signal detection, benefit–risk analytics, and RMP/REMS management
- PV governance and compliance
- Cross-functional safety intelligence

6. Regulatory management

- Regulatory planning, strategy, and life cycle management
- Labeling and artwork management
- Submission authoring and publishing
- Health authority engagement and query management
- Regulatory risk tracking and IDMP/SPOR readiness

7. Quality and compliance

- Quality policy, SOP, and document management
- Training and competency
- Audit, inspection, and CAPA management
- Verification and validation
- Deviation, non-conformance, and complaints management
- Supplier quality tracking and change control

8. Medical affairs

- Medical affairs strategy and Medical Science Liaisons (MSLs)
- Investigator-initiated Research (IIR)
- Medical information management
- Health Economics and Outcomes Research (HEOR), including real-world evidence
- Publications, congress, and scientific communications

IT service types

Data, analytics, and AI services: Data engineering, integration, governance, and management; BI and visualization; predictive and prescriptive analytics; AI/ML model development; conversational, generative, and agentic AI

Application services: Application development, modernization, integration, and managed services; quality assurance (QA)

Enterprise platform services: Platform implementation, configuration, maintenance, validation, and integration; managed services

Cloud and infrastructure services: Network, security, workplace; cloud/infrastructure hosting, migration, and modernization

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Pharmaceutical R&D IT Services PEAK Matrix® characteristics

Leaders

Accenture, Capgemini, Cognizant, Deloitte, Excelra, HCLTech, Infosys, TCS, and Zifo

- Leaders offer a broad spectrum of R&D IT services across discovery and research informatics, clinical development, safety, regulatory, and quality, supported by data, application, platform, and cloud capabilities
- They are investing in gen AI and agentic AI across the R&D value chain through use cases, including molecule and protein design, in-silico screening, protocol authoring, and AI-based signal detection. This, combined with large-pharma relationships and global delivery scale complemented by strong proprietary IP, enables them to address buyer pain points effectively
- Leaders have sustained visibility in the market through investments in centers of excellence, broad partnerships, and client case studies that reinforce domain leadership

Major Contenders

Apexon, Astrix, Atos, Brillio, CitiusTech, EPAM, IBM, LTM, Nagarro, NNIT, NTT DATA, Persistent Systems, Quantori, Tech Mahindra, USDM Life Sciences, UST, Virtusa, Wipro, and ZS Associates

- Major Contenders focus on selected R&D areas such as computational discovery, bioinformatics, lab informatics, clinical development, and quality and compliance, often supported by modular accelerators and domain-specific IP
- Many are advancing gen AI and agentic AI across use cases, such as molecular screening, experiment summarization, scientific HPC orchestration, or trial risk assessment, although scaled production deployments remain concentrated among select providers
- Several are strengthening their R&D propositions through targeted M&A and ecosystem partnerships with hyperscalers, scientific technology vendors, and life sciences platforms, helping them deepen domain capabilities and expand into adjacent R&D workflows

Aspirants

Altimetrik, DXC Technologies, Emids, Epista Life Science, Orion Innovation, and Zensar

- Aspirants are more commonly positioned around targeted modernization or point-solution requirements, including clinical platforms, regulatory and quality workflows or application modernization and data engineering
- Their propositions typically have limited cross-functional integration across the value chain, particularly across discovery, preclinical, and science-intensive informatics
- To compete for broader R&D transformation mandates, they need to build deeper scientific domain talent, R&D-specific IP and vertical partnerships, and stronger proof of scaled deployments

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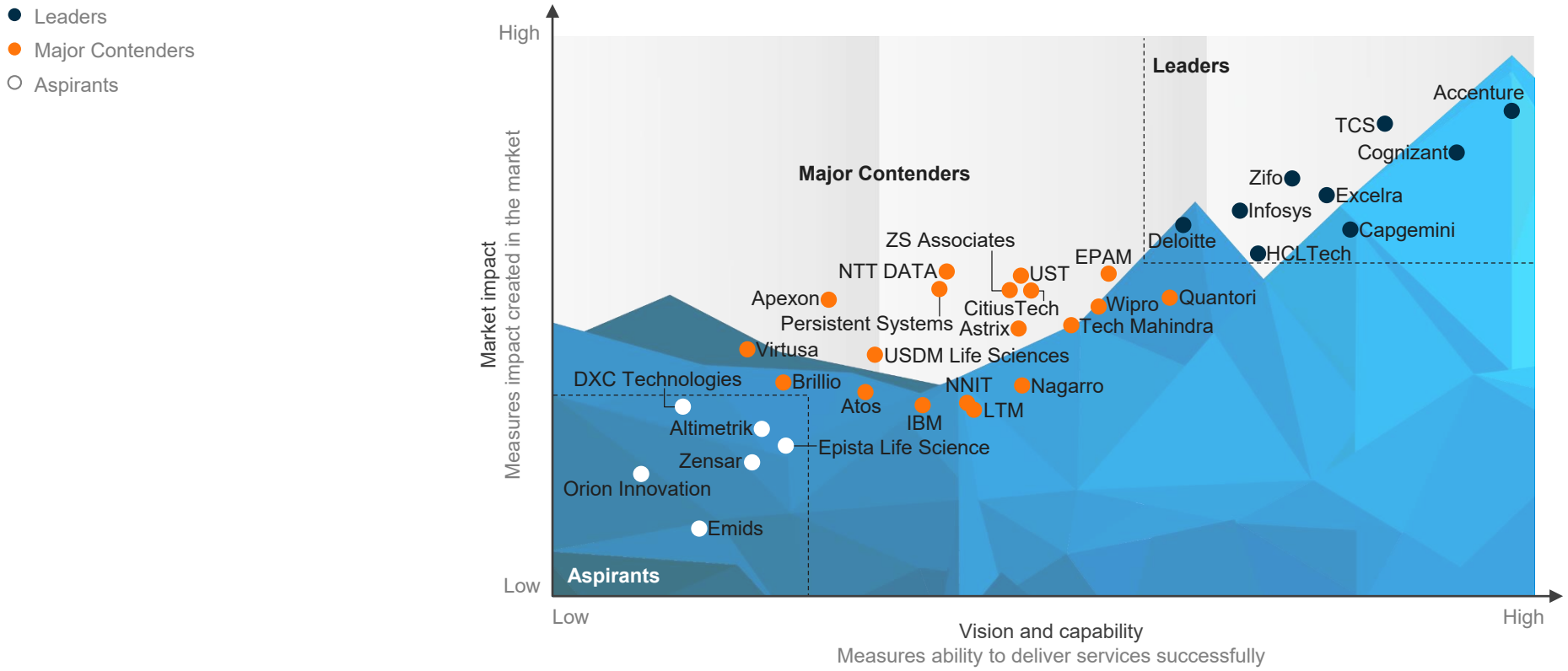
Everest Group PEAK Matrix®

Pharmaceutical R&D IT Services PEAK Matrix® Assessment 2026 | TCS is positioned as a Leader

Everest Group Pharmaceutical R&D IT Services PEAK Matrix® Assessment 2026



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TCS

Everest Group assessment – Leader

Measure of capability: Low High

Market impact				Vision and capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
								

Strengths

- TCS differentiates through its productized TCS ADD™ suite across clinical, safety, regulatory, and medical workflows, combining scaled adoption with measurable impact, including more than 1 million pharmacovigilance cases processed annually and Study Data Tabulation Model (SDTM) submission preparation reduced from four weeks to three days
- It complements its broad hyperscaler and AI partnerships with targeted R&D partnerships, leveraging Benchling for digital experimentation and scientific workflows, Dassault Systèmes for science-based virtual twins, and Veeva for regulated workflows
- TCS has invested in research infrastructure spanning a DNA sequencing and genomics lab, and scientific AI capabilities across molecule design, antibody engineering, and translational research, supported by 100+ researchers, 25+ PhDs and 50+ patents
- Clients highlight TCS' collaborative and flexible engagement model, with multidisciplinary teams that adapt to changing project priorities and remain engaged from experimentation through deployment and operations

Limitations

- TCS is expanding its upstream scientific AI proposition, but several newer capabilities across antibody engineering, lab assistance, and research portfolio modernization remain at pilot, or MVP stage, with scaled adoption less established than its mature clinical technology portfolio
- Enterprises seek stronger delivery governance from TCS through clearer milestone ownership, earlier risk identification, and proactive escalation of dependencies
- While TCS brings broad technical depth, clients expect greater continuity of senior resources and more structured transition planning to ensure timely documentation, knowledge transfer, and operational handover
- TCS' R&D footprint remains concentrated among very large enterprises in North America and Europe, including the UK, with selective APAC penetration despite the region's growing role in early-stage trials

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Market trends

Pharma R&D IT demand is accelerating as enterprises respond to rising scientific complexity, data intensity, and pressure to improve R&D productivity

Market size and growth

- Everest Group estimates the global pharmaceutical R&D IT services market to be ~US$8.5 billion in 2026, supported by sustained pharma R&D investment, growing technology intensity across the drug development life cycle, and continued modernization of complex and fragmented R&D IT estates
- Everest Group estimates a 10-15% growth rate for the global pharmaceutical R&D IT services market in 2026, reflecting rising enterprise investment in agentic AI across discovery and preclinical workstreams, alongside continued modernization of core R&D platforms such as LIMS and ELN

Key drivers

Improve R&D productivity and cost efficiency	Rising trial costs, manual process intensity, and long development timelines are increasing the pressure for streamlining R&D operations for faster molecule to market
Growth of multimodal scientific data	Genomics, proteomics, imaging, pathology, laboratory, clinical, and real-world data are expanding rapidly, increasing demand for scientific-data platforms, semantic integration, knowledge graphs, and scalable compute
Rising complexity of therapeutic modalities	Cell and gene therapies, RNA-based medicines, precision oncology, and other advanced modalities require more specialized data and modeling, driving demand for domain-specific R&D technology services
Data-intensive clinical development	Biomarker-led trials, smaller patient populations, adaptive designs, and growing use of external and real-world data are increasing the need for integrated clinical data flows, analytics, and AI-enabled decisioning

Opportunities

Build AI-ready R&D data foundations	Providers can help build AI-enabled data foundations that integrate fragmented discovery, clinical, regulatory, safety, quality, lab, and external partner data into governed, reusable, and interoperable data environments

Challenges

Interoperability across fragmented R&D systems	Fragmented R&D systems and inconsistent standards limit interoperability and traceability across lab, clinical, safety, regulatory, and enterprise platforms
Scientific AI still has a material pilot-to-production gap	Newer discovery, laboratory, and scientific agentic AI propositions frequently remain at pilot, MVP, or prototype stage, limiting enterprise adoption

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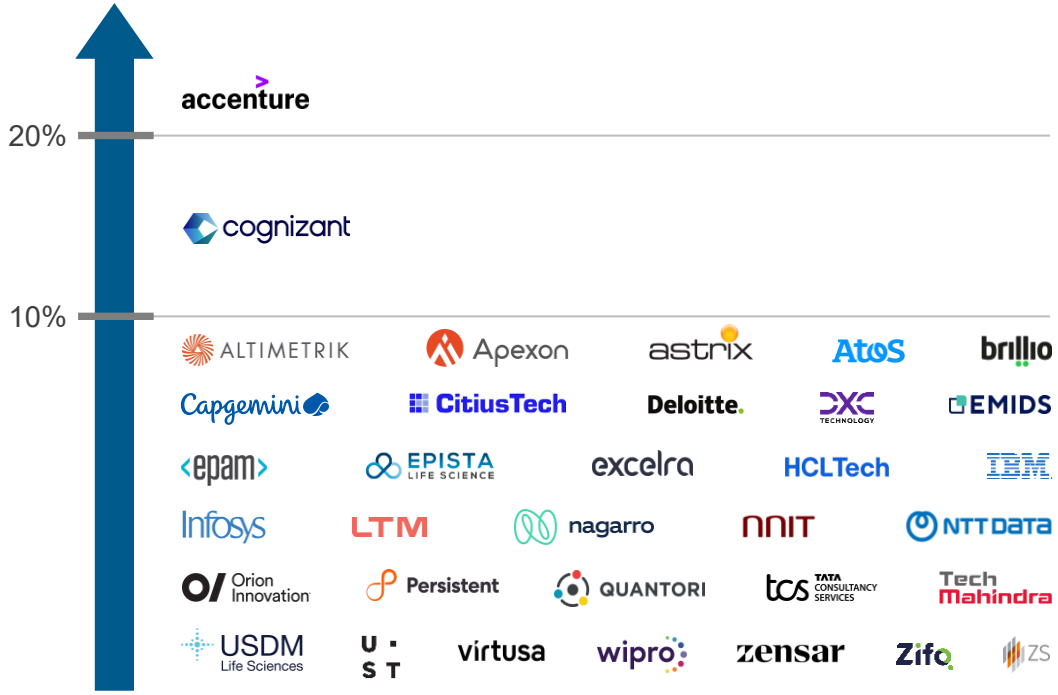
Provider landscape analysis

Provider market share remains concentrated among a few large players, while growth momentum is strongest among select midsized and specialist providers

Market share analysis of the providers[1]

2025; percentage of overall market of Pharma R&D IT services



Provider market share by YoY growth

2024-25



1 Providers are listed alphabetically within each range

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Key buyer considerations

Buyers increasingly prioritize science-led domain depth, production-grade AI, interoperable data foundations, measurable R&D outcomes, and execution continuity when selecting pharmaceutical R&D IT providers

Key sourcing criteria

High

Priority

Low

Science-led domain depth

Buyers prioritize providers that show deep scientific expertise and the ability to demonstrate strong technical skills to execute science-led technology workstreams

AI, gen AI, and agentic AI maturity

Preference is shifting from pilots and standalone assistants toward governed AI embedded within upstream R&D with evidence of repeatable deployment and scaled adoption

AI-ready data and interoperability

Providers are increasingly evaluated on their ability to connect laboratory, omics, imaging, clinical, safety, and regulatory data through governed semantic and interoperable data foundations

Measurable R&D outcomes

Buyers are looking beyond automation and cost takeout toward evidence of improved research productivity, trial execution, scientific decision-making, regulatory readiness, and quality outcomes

Delivery continuity and adoption at scale

Enterprises increasingly value providers that retain domain knowledge, mobilize multidisciplinary teams, and sustain ownership as innovations move from experimentation into production and steady-state operations

Summary analysis

Buyer expectations are shifting from broad technology coverage toward fit-for-purpose R&D transformation capabilities

Scientific depth and production-grade AI are emerging as key differentiators, while compliance and interoperable data remain prerequisites for enterprise adoption

Providers that can demonstrate repeatable deployment, measurable scientific and clinical outcomes, and sustained ownership through operationalization are increasingly better positioned for strategic R&D mandates

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Key takeaways for buyers

Buyers are prioritizing providers who can offer a combination of domain strength, AI-led innovation, and technical capability to drive transformation across R&D workflows. As downstream technology estates mature, greater emphasis is shifting to scientific data, connected labs, and governed AI that can translate into measurable upstream R&D productivity



Shifts in provider capabilities

Providers are expanding beyond application and platform modernization into scientific AI, bioinformatics, connected laboratories, agentic workflows, and interoperable R&D data foundations, increasing the importance of assessing depth beyond conventional IT delivery



Differentiation across provider models

Broad-based GSIs bring scale across clinical, regulatory, safety, quality, and enterprise platforms, while science-led and specialist providers can offer deeper capabilities in discovery, laboratory informatics, and selected regulated workflows. Buyers should align provider choice with the transformation agenda and required depth of specialization



The laboratory is becoming a broader transformation surface

Buyers are moving beyond core LIMS and ELN modernization toward connected, data-rich laboratory environments that integrate instruments, scientific workflows, AI-enabled assistants, and validation to improve experiment execution and scientist productivity

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Appendix

PEAK Matrix® framework

FAQs

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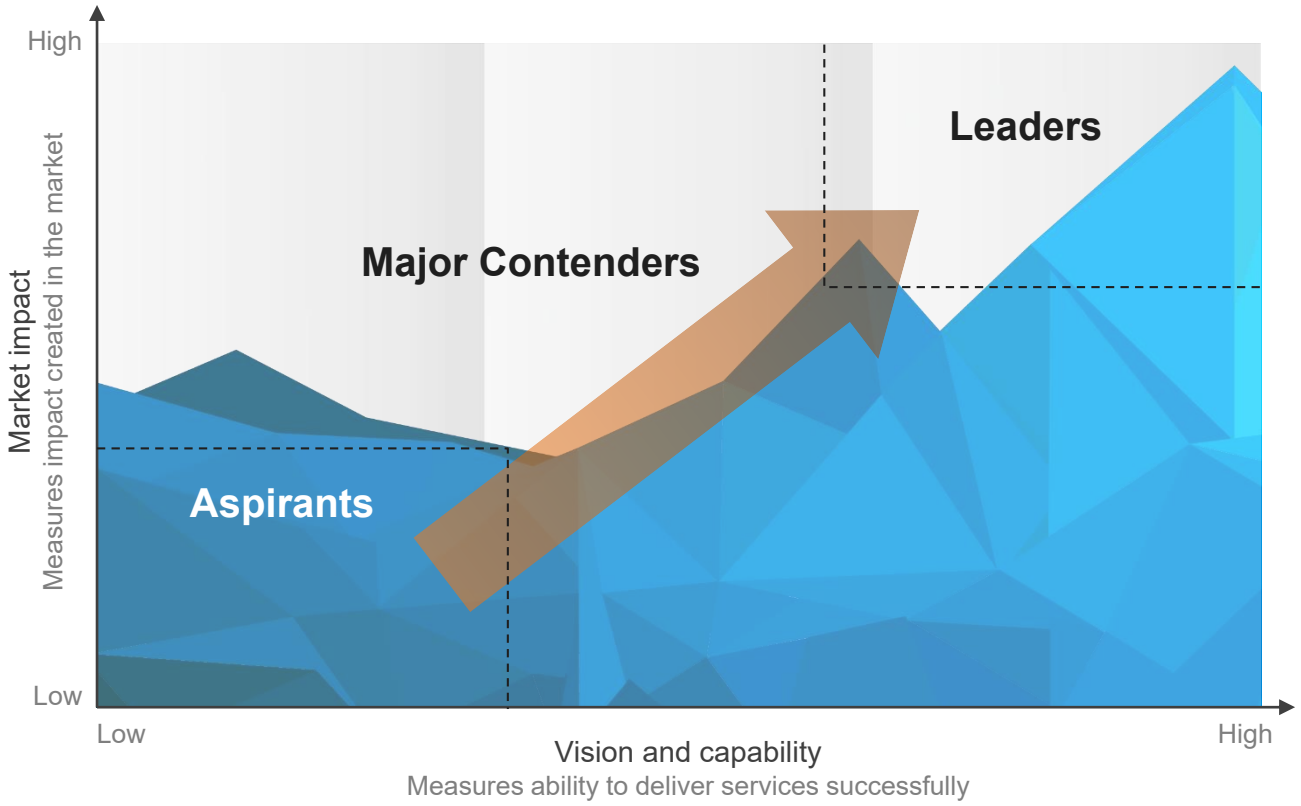
Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision and capability

Everest Group PEAK Matrix



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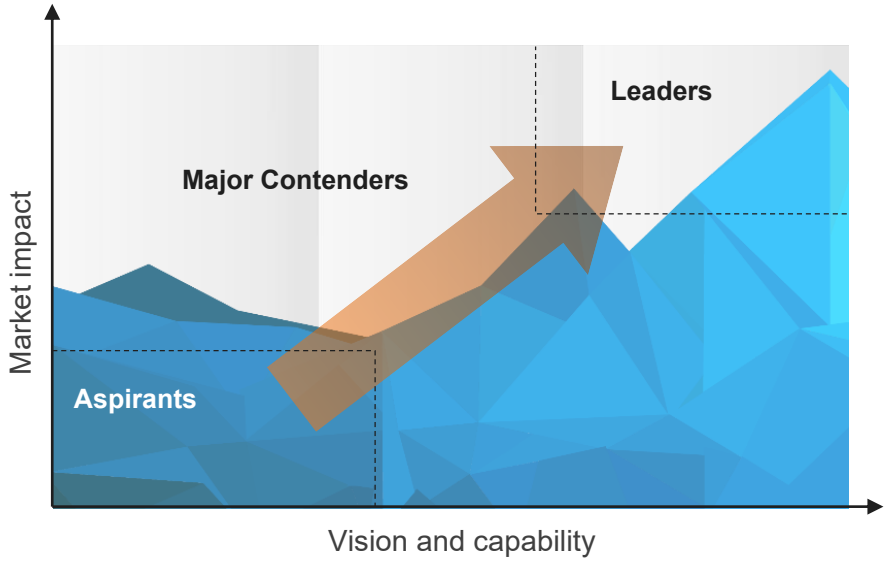
Services PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

Market adoption
Number of clients, revenue base, YoY growth, and deal value/volume

Portfolio mix
Diversity of client/revenue base across geographies and type of engagements

Value delivered
Value delivered to the client based on customer feedback and transformational impact



Measures ability to deliver services successfully. This is captured through four subdimensions

Vision and strategy
Vision for the client and itself; future roadmap and strategy

Scope of services offered
Depth and breadth of services portfolio across service subsegments/processes

Innovation and investments
Innovation and investment in the enabling areas, e.g., technology IP, industry/domain knowledge, innovative commercial constructs, alliances, M&A, etc.

Delivery footprint
Delivery footprint and global sourcing mix

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FAQs

Q: Does the PEAK Matrix® assessment incorporate any subjective criteria?

A: Everest Group's PEAK Matrix assessment takes an unbiased and fact-based approach that leverages provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information. In addition, we validate/fine-tune these results based on our market experience, buyer interaction, and provider/vendor briefings.

Q: Is being a Major Contender or Aspirant on the PEAK Matrix, an unfavorable outcome?

A: No. The PEAK Matrix highlights and positions only the best-in-class providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition.

Q: What other aspects of the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?

A: A PEAK Matrix positioning is only one aspect of Everest Group's overall assessment. In addition to assigning a Leader, Major Contender, or Aspirant label, Everest Group highlights the distinctive capabilities and unique attributes of all the providers assessed on the PEAK Matrix. The detailed metric-level assessment and associated commentary are helpful for buyers in selecting providers/vendors for their specific requirements. They also help providers/vendors demonstrate their strengths in specific areas.

Q: What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?

A: Enterprise participants receive summary of key findings from the PEAK Matrix assessment

For providers

- The RFI process is a vital way to help us keep current on capabilities; it forms the basis for our database – without participation, it is difficult to effectively match capabilities to buyer inquiries
- In addition, it helps the provider/vendor organization gain brand visibility through being in included in our research reports

Q: What is the process for a provider / technology vendor to leverage its PEAK Matrix positioning?

A: Providers/vendors can use their PEAK Matrix positioning or Star Performer rating in multiple ways including:

- Issue a press release declaring positioning; see our citation policies
- Purchase a customized PEAK Matrix profile for circulation with clients, prospects, etc. The package includes the profile as well as quotes from Everest Group analysts, which can be used in PR
- Use PEAK Matrix badges for branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)

The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with Everest Group; please contact your CD or contact us

Q: Does the PEAK Matrix evaluation criteria change over a period of time?

A: PEAK Matrix assessments are designed to serve enterprises' current and future needs. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality and to serve enterprises' future expectations.

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