Everest Group®

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

Focus on Excelra
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

## Pharmaceutical R&D value chain

[NOT EXHAUSTIVE]

### 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

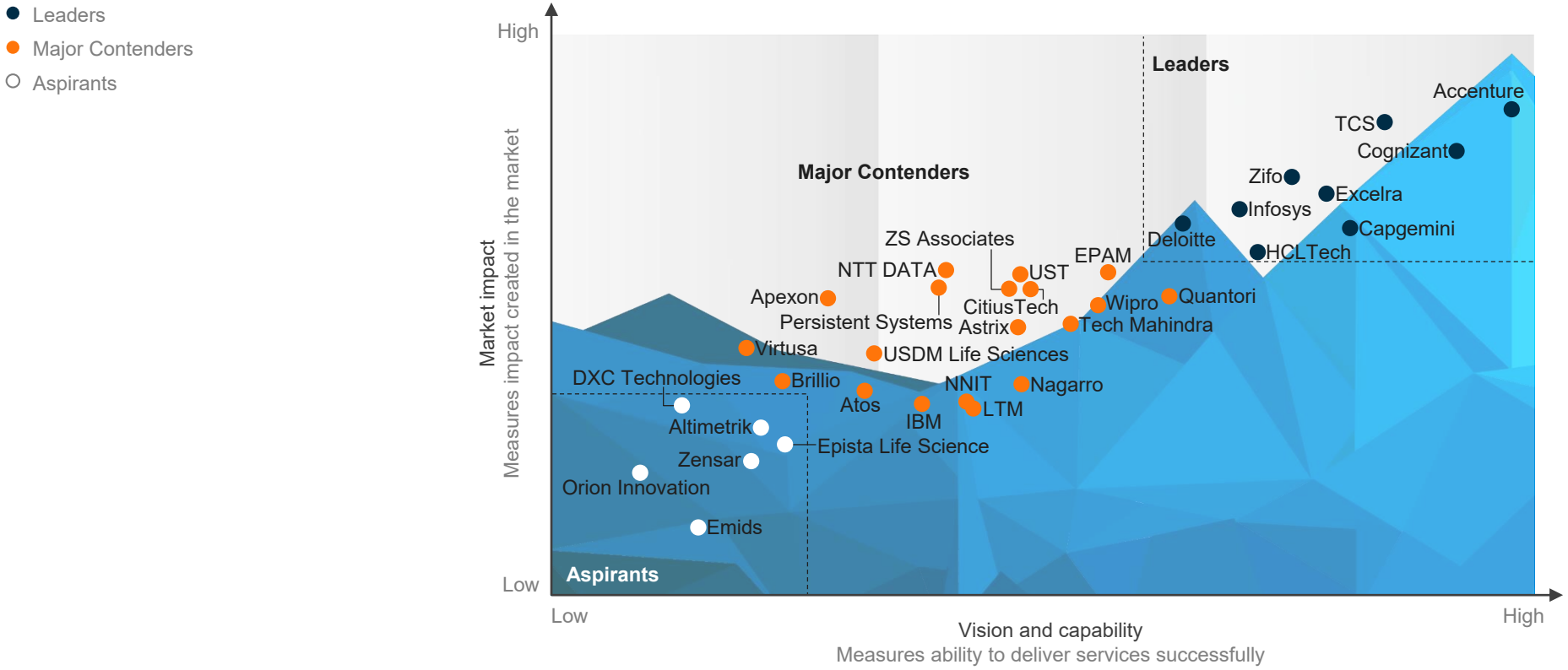
- Aspirants are more commonly positioned around targeted modernization or point-solution requirements, including clinical platforms, regulatory and quality workflows or application modernization and data engineering
- Their propositions typically have limited cross-functional integration across the value 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 | Excelra is positioned as a Leader

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




Source: Everest Group (2026)

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# Excelra

## 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

- Excelra differentiates through proprietary curated scientific datasets such as GOSTAR, spanning diverse molecular modalities covering more than 37 million bioactivity records, with source-level provenance and AI/ML-ready structure–activity intelligence that supports compound screening, lead optimization, and predictive model development
- Excelra has undertaken a verticalized scientific AI approach combining internal accelerators, such as CelraAI for clinical/RWE data extraction, with productized offerings across multimodal data and analytics, scientific knowledge retrieval, and regulatory intelligence in addition to a strong pipeline of 10+ PoCs
- It has strengthened its bioinformatics talent pool and European client proximity through the acquisition of BISC Global
- It has developed a diverse ecosystem spanning hyperscalers, such as AWS, Microsoft Azure, and Google Cloud, laboratory informatics providers, including LabWare, and LabVantage, and technology partners such as Sapio Sciences and IDBS
- It regularly invests in market visibility through published thought leadership content and case studies

### Limitations

- While Excelra portfolio demonstrates portfolio depth across discovery, translational research, and scientific-data capabilities, it has limited delivery scale in other R&D areas such as clinical operations, pharmacovigilance, regulatory, and enterprise wide R&D mandates
- It has comparatively limited breadth in enterprise application modernization, infrastructure transformation, and scaled managed services compared to larger IT providers, constraining its ability to support complex, multi-tower R&D technology transformation programs
- While Excelra offers hybrid engagement models and is viewed as an innovation partner; as buyer expectations evolve, broader adoption of risk sharing and fully outcome-based constructs would strengthen its strategic positioning by linking commercial terms more directly to agreed R&D KPIs

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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 |

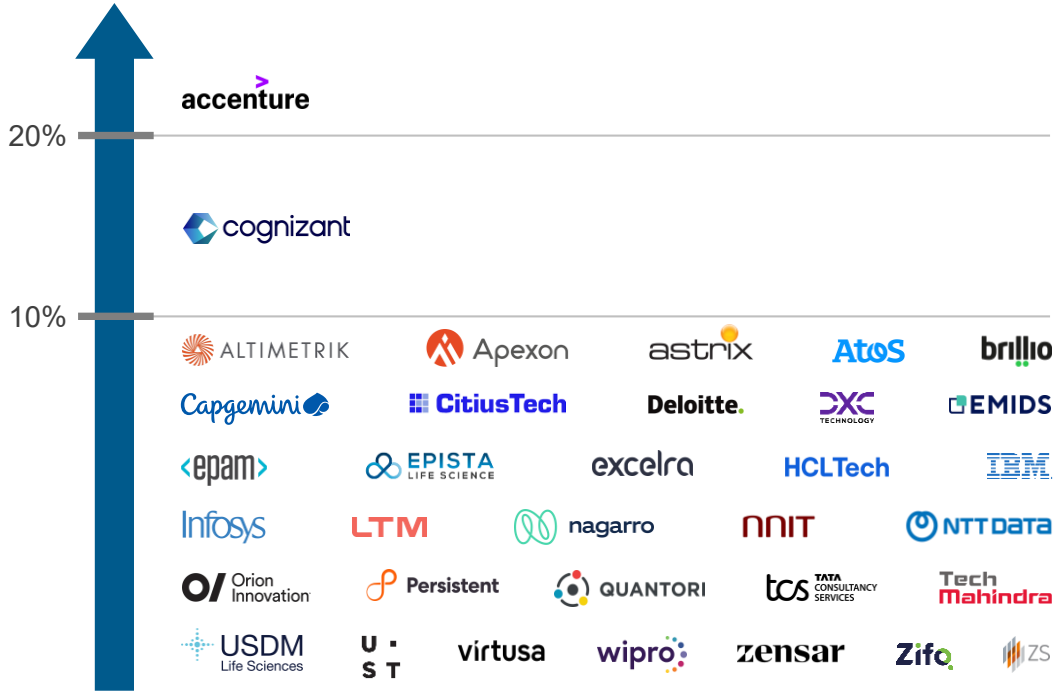
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# Provider landscape analysis

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

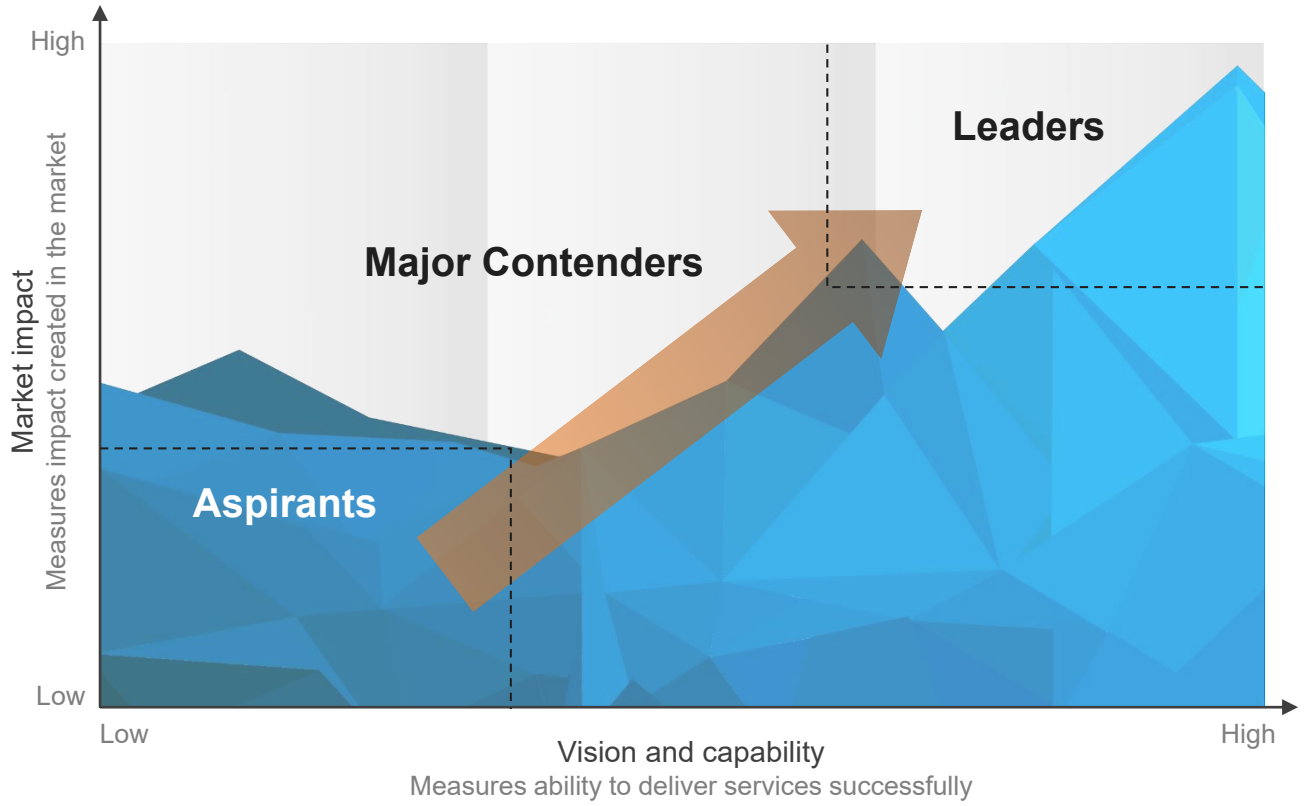
PEAK Matrix® framework

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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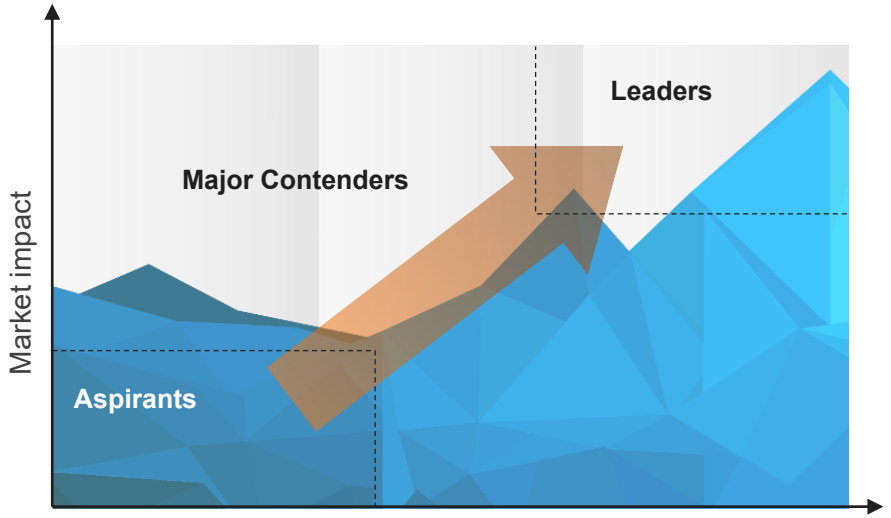
# Services PEAK Matrix® evaluation dimensions

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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