

IDC MarketScape: Worldwide Life Sciences Healthcare Provider (HCP) Engagement Services 2025 Vendor Assessment

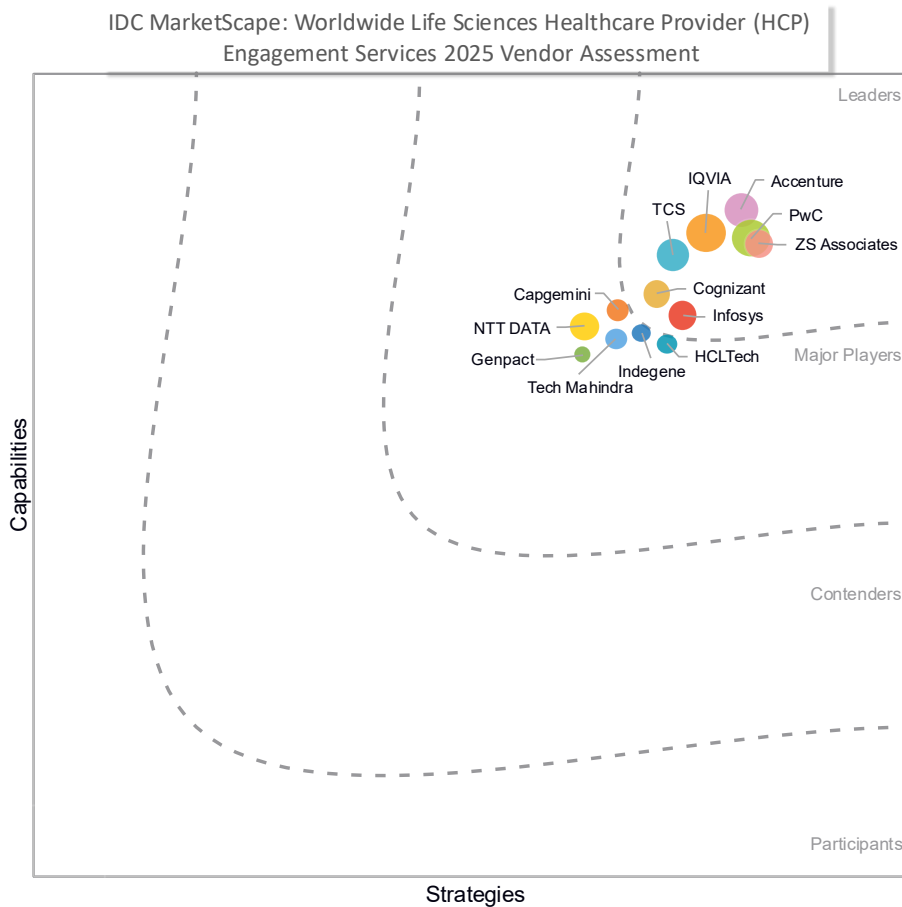
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THIS EXCERPT FEATURES ACCENTURE AS A LEADER

IDC MARKETScape FIGURE

FIGURE 1

IDC MarketScape: Worldwide Life Sciences Healthcare Provider (HCP) Engagement Services 2025 Vendor Assessment



Source: IDC, 2025

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

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Life Sciences Healthcare Provider (HCP) Engagement Services 2025 Vendor Assessment (Doc # US51813524).

IDC OPINION

This IDC MarketScape evaluates global professional services vendors that assist life sciences organizations in planning, assessing, and implementing healthcare provider (HCP) engagement tools and solutions to help them effectively identify, target, and engage with healthcare professionals.

In the face of rapidly evolving market demands, regulatory changes, and heightened customer and patient expectations, life sciences organizations worldwide face mounting pressure to transform how they engage with healthcare professionals to deliver more personalized, impactful, and high-value interactions.

The proliferation of digital engagement channels, sharply accelerated by the COVID-19 pandemic, has fundamentally reset the rules for HCP interactions, ushering in a new era of engagement models and strategies. Furthermore, the shift toward patient-centric, personalized models of care and clinical research calls for a strategic overhaul of traditional HCP engagement approaches to ensure more intelligent, insights-driven, and personalized engagements throughout HCP journeys.

In this context, transforming customer engagement models has emerged as a strategic imperative for life sciences organizations. Worldwide, companies are reimagining tech-enabled HCP engagement strategies to reach healthcare professionals at the right time, through the right channels, with the right messages, and in the right clinical and operational contexts.

As the industry races to transform HCP engagement and customer experience, life sciences organizations are increasingly leveraging tech-enabled solutions. They are tapping into the potential of AI, generative AI (GenAI), agentic AI, and digital twins to incorporate intelligence and personalization into every interaction across virtual and physical settings.

The life sciences industry ranks among the fastest adopters of GenAI, with HCP engagement standing out as the richest vein to mine in this "GenAI gold rush." This is fueling hyper-personalized HCP engagement strategies. IDC's recent research indicates that HCP engagement applications are among the top areas to benefit from the new wave of GenAI-driven transformation. According to IDC survey data, over 75% of life sciences organizations worldwide have either fully implemented Gen

AI or are currently implementing it for targeted messaging to HCPs and addressing their queries (IDC's *Vertical AI Use Case Survey 2025*, March 2025).

AI agents are further revolutionizing HCP engagement workflows. According to recent IDC research, more than a third of life sciences executives actively seek guidance from their IT experts on how to leverage agentic AI to improve customer experience through personalized interactions. Approximately 35% of industry organizations are prioritizing the use of AI agents to enhance customer engagement personalization (*IDC MaturityScope Benchmark AI Survey*, February 2025).

As companies aim to embrace precision medicine and become more patient-centric while enhancing productivity, efficiency, and time to value, the ability to personalize HCP interactions at scale by leveraging real-time data and advanced analytics will be a key source of competitive advantage. This will redefine the future of HCP engagement while driving patient outcomes and experiences.

Within this market landscape, life sciences organizations are increasingly demanding services that support their HCP engagement initiatives. This helps them bridge digital competency gaps, navigate regulatory complexities, manage organizational change, and harness innovative technologies (including advanced AI-driven capabilities) to unlock new levels of intelligence, personalization, and value.

IDC MARKETSCOPE VENDOR INCLUSION CRITERIA

This IDC MarketScope evaluates global professional services vendors that provide IT and business services to support life sciences organizations in the planning, assessment, and implementation of various HCP engagement tools and solutions to help them identify, target, and engage with healthcare providers effectively; reach their HCP engagement objectives; and maximize business value from their technology investments.

IDC has defined the following key inclusion criteria to ensure this IDC MarketScope is a fair assessment of vendors who are active in this market:

- The vendor must have an established global presence in the life sciences market, serving life sciences customers in at least two global regions (Europe, North America, Asia/Pacific, Latin America, and the Middle East and Africa).
- The vendor must offer both IT and business services to life sciences organizations to support them in the planning, assessment, and implementation of various HCP engagement tools and solutions.
- The vendor must have a minimum annual revenue of \$300 million. At least 20% of its professional services revenue must be derived from IT services and at least 5% from business services.
- The vendor must have at least 10 years of life sciences services experience and at least 10 active customers for its HCP engagement services.

- The vendor offers a mix of systems implementation and integration, business consulting, and business process outsourcing (BPO) services across a broad range of HCP engagement areas (see Market Definition section).

Thirteen vendors qualified for inclusion in this *IDC MarketScape for Worldwide Life Sciences HCP Engagement Services 2025*, as listed below:

- Accenture
- Capgemini
- Cognizant
- Genpact
- HCLTech
- Indegene
- Infosys
- IQVIA
- NTT DATA
- PwC
- TCS
- Tech Mahindra
- ZS Associates

ADVICE FOR TECHNOLOGY BUYERS

Current market dynamics demand a decisive shift from siloed, reactive customer engagement approaches to intelligent, data-driven, and personalized omni-channel engagement models that ensure precision targeting, deep personalization, and meaningful interactions at every touchpoint while maintaining strict compliance with regulatory standards.

As life sciences organizations rethink their commercial strategies, this transformation will also entail a strategic reconfiguration of how they adapt to emerging health care and payment models, build ecosystem trust, and deliver patient value within the evolving landscape of value-based healthcare.

While the ability to effectively identify, target, and engage with HCPs has become a strategic imperative for life sciences organizations, selecting the right HCP engagement services partner is essential for successfully navigating this transformation. This IDC MarketScape study suggests that the key attributes life sciences organizations should consider when selecting HCP engagement services partners include the following:

- **Integrated, end-to-end services:** The ability to provide integrated services, with a comprehensive mix of capabilities that support HCP engagement initiatives across the entire engagement life cycle, ensuring close alignment

between IT and business services for seamless delivery of end-to-end support — from strategic advisory to operational execution and optimization

- **Proven life sciences experience and expertise:** Vendors' expertise across the life sciences value chain, including cross-functional expertise and related capabilities, with a strong understanding of the specific regulatory and operational complexities associated with HCP engagement initiatives
- **Fit for priority use cases:** Demonstrated capabilities and experience in high-priority use cases, backed by a strong track record of successful customer engagements and measurable outcomes to ensure relevance and impact, especially for targeted initiatives with a narrow focus
- **Scalability and speed to value:** The ability to balance global reach with local execution, supporting enterprise-wide implementations, large-scale migrations, and multi-region scalability, as well as local languages and responsiveness to country-specific needs, to reduce complexity, expedite deployments, and accelerate time to value
- **Nuanced regulatory expertise:** Deep understanding of industry standards and nuanced regulatory requirements in target regions, market subsegments, and relevant therapeutic areas and medical specialties, enabling effective delivery on project objectives while minimizing compliance risks
- **Data management, privacy, and security:** Robust data management and governance capabilities, with deep expertise in advanced data security and privacy-preserving technologies to ensure the secure, compliant, and responsible utilization of multi-sourced data (including data from internal and external sources and real-world data) across all HCP engagement initiatives
- **Innovation enablement:** The vendor's expertise in AI-driven technologies, including GenAI and agentic AI, along with a proactive approach to delivering innovation, anticipating customer needs, supporting early strategic planning, identifying high-impact opportunities, and co-innovating to enable HCP engagement innovation and maximize business value
- **Ecosystem partnerships:** The depth and breadth of alliances across the HCP engagement technology ecosystem and beyond, including partnerships with specialized tech suppliers, industry players, healthcare organizations, payers, and regulators. These alliances enable vendors to fully meet life sciences organizations' HCP engagement objectives, ensure compliance, expedite time to value, and adapt to emerging trends in the converging landscape of healthcare and life sciences.
- **Customer focus and outcome-oriented strategies:** Vendors are expected to offer flexible delivery models that adapt to diverse organizational needs and constraints. They should utilize structured, outcomes-focused agile methodologies and leverage strong client collaboration and continuous stakeholder feedback to ensure business alignment, effective change management, and sustainable long-term value from technology investments.

VENDOR SUMMARY PROFILE

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

Accenture

After a thorough evaluation of its offerings and capabilities, IDC has positioned Accenture in the Leaders category in this 2025 IDC MarketScape for Worldwide Life Sciences Healthcare Provider (HCP) Engagement Services.

Founded in 2001 and headquartered in Dublin, Ireland, Accenture is a publicly traded company serving clients in more than 120 countries with a global workforce of approximately 791,000. It has over 35 years of experience in the life sciences industry, and its client base includes many prominent global companies in the pharmaceutical, biotech, and medical device subsegments. A notable portion of its life sciences customers are based in Europe and North America, with a growing presence across Asia/Pacific and the rest of the world.

Accenture provides end-to-end HCP engagement services spanning strategy and transformation consulting, implementation and integration, and business process outsourcing (BPO), offering deep capabilities and experience across the full spectrum of HCP engagement areas and related data-driven services.

Accenture has demonstrated successful outcomes in multiple engagements with life sciences customers, including in marketing operations, omni-channel digital engagement, content and digital asset management, AI-assisted suggestion generation, and HCP targeting. This has enabled customers to personalize HCP interactions, enhance customer experience, improve productivity and efficiency, reduce costs, and accelerate time to market.

For example, Accenture supported a global pharmaceutical organization in transforming its marketing operations and omni-channel engagement personalization by establishing a centralized marketing operations center with an AI/GenAI-enabled global-to-local content creation model. This engagement achieved a 55% increase in content reuse, an increase of up to 30% in email performance, a 40% reduction in briefing time, a 20% increase in HCP engagement rates, and a 45% improvement in speed to market.

Accenture supports a wide range of application vendors in the HCP engagement space, most extensively Veeva, Salesforce, IQVIA, and Adobe. Its offering expansion road map is anchored in its robust ecosystem-led strategy, leveraging a broad ecosystem of partnerships with key global technology providers (e.g., AWS, Google, Oracle, and Microsoft) and niche players, as well as collaborations with innovative

startups and academic institutions to drive innovation and enhance its HCP engagement offerings and capabilities.

Strengths

Accenture combines deep industry and consulting expertise with robust technology and innovation capabilities to provide end-to-end support for life sciences organizations' HCP engagement needs. Accenture has been recognized for:

- **Deep industry and cross-functional expertise for end-to-end transformation:** Customers value Accenture's deep industry expertise. With more than 22,000 dedicated professionals in its life sciences practice, the company draws on decades of industry experience to serve life sciences organizations in diverse market subsegments, regions, and organizational sizes. It leverages a global delivery network and a multi-disciplinary approach to support the global redesign and execution of HCP engagement strategies. Accenture's teams integrate strategy, technology enablement, and operational delivery expertise to provide end-to-end support for customers, from planning through execution. Its structured methodologies and industry-specific accelerators foster close alignment with customers' goals, backed by rigorous change management support for sustainable outcomes. The company also makes co-innovation a core part of its life sciences engagements, co-investing and collaborating closely with its customers to jointly design and develop innovative, industry-tailored solutions.
- **AI-driven technology capabilities and innovation focus:** Accenture pursues a strong innovation agenda for HCP engagement, integrating advanced digital tools and proprietary platforms (e.g., GenWizard), modular AI agents, and GenAI assistants to support areas such as HCP targeting, omni-channel orchestration, next best action, marketing analytics, and data-driven operations. Its approach leverages AI and advanced analytics within flexible frameworks to support customers in refining HCP engagement strategies and operations as they adapt to shifting market dynamics. The company has also developed agentic accelerators on Salesforce's Agentforce for its life sciences customers; these are currently being scaled to drive efficiencies and enhance HCP experiences through personalized, agentic-first interactions, cross-functional orchestration, and "always on" capabilities.
- **Expanding capabilities through ecosystem partnerships at scale:** Accenture's extensive network of ecosystem partners supports flexible and scalable transformation in diverse life sciences technology environments. The company pursues collaborations with multiple global and specialized partners. These alliances, combined with its academic collaborations and dedicated innovation centers and centers of excellence (e.g., in Dublin, Boston, Barcelona, Bengaluru, and Singapore), enable Accenture to accelerate innovation and address fast-evolving industry trends. Additionally, strategic acquisitions (e.g., ConcentricLife in 2023, the Beacon Group in 2022, and

Future State in 2021) have enhanced the company's ability to deliver industry-tailored services and solutions, strengthening its broader ecosystem-driven co-innovation strategy.

Challenges

While Accenture demonstrates robust end-to-end capabilities in delivering HCP engagement services to life sciences customers on a global scale, the company would benefit from sharpening its marketing messaging to more clearly highlight its differentiated capabilities and offerings in this market. Accenture also has an opportunity to refine its value proposition to better align with the needs of life sciences organizations with varying levels of digital maturity pursuing relatively narrowly scoped, limited-scale initiatives.

Consider Accenture When

Life sciences organizations should consider Accenture when seeking an end-to-end transformation partner for comprehensive HCP engagement initiatives that demand both deep life sciences expertise and advanced technology capabilities. Accenture is particularly suitable for large-scale global projects requiring rapid scaling while ensuring local adaptability and compliance with complex regulatory requirements (including in highly specialized industry areas). The company is a compelling choice for AI/GenAI-driven HCP engagement innovation initiatives, including use cases such as omni-channel orchestration, next best action, content personalization, and market access strategies. Accenture is also well-positioned to guide organizations through the complexities and transitions associated with the evolving Veeva/Salesforce landscape.

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 it is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. In this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

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

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

IDC MarketScape Methodology

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

Market Definition

For the purposes of this study, healthcare provider (HCP) engagement services are defined as a combination of IT and business services that assist life sciences organizations in planning, assessing, and implementing various HCP engagement tools and solutions to help them effectively identify, target, and engage with HCPs and maximize business value from their technology investments.

As defined in this study, HCP engagement services include strategy and transformation consulting, systems implementation and integration, and business process outsourcing (BPO) services.

- **Systems implementation and integration:** For the purposes of this study, systems implementation and integration is defined as a process that includes the planning, design, implementation, and project management of technical solutions to address life sciences organizations' HCP engagement needs. These projects may involve the implementation and integration of different HCP engagement applications from various vendors. If they involve contracting for custom application development related to systems implementation and integration, these activities are included in the scope of this assessment.
- **Strategy and transformation consulting:** In the context of this study, strategy and transformation consulting refers to business consulting services that involve strategic consulting, operational improvement, and organizational change consulting services to help life sciences organizations define the strategy and design and implement the structures and processes that help them reach their HCP engagement goals and realize strategic business value from their HCP engagement investments and activities.
- **Business process outsourcing (BPO):** IDC defines business process outsourcing as the transfer of management and execution of one or more complete business activity, business process, or entire business to a BPO vendor. For the purposes of this study, BPO contracts with life sciences companies can include the transfer of management and execution of the entire HCP engagement function or discrete segments thereof.

These services are delivered to life sciences organizations — which include pharmaceutical, biotech, and medical device organizations — to support a broad range of HCP engagement areas and related data-driven services, including (but not limited to) customer relationship management (CRM), field planning, omni-channel digital engagement, customer segmentation and targeting, AI-assisted suggestion generation, medical affairs communications, events management, marketing analytics, content and digital asset management, patient and prescriber data management, customer reference data management, and KOL data management.

Related Research

- *IDC FutureScape: Worldwide Life Sciences Industry 2026 Predictions* (forthcoming)
- *The Technology Impact of the New Trump Administration, 2025: Life Sciences, Medtech Companies, Healthcare Providers, and Healthcare Payers* (IDC #US53552525, June 2025)
- *Generative AI Use Case Taxonomy, 2025: The Life Sciences Industry* (IDC #US52220325, May 2025)
- *IDC MaturityScape Benchmark: AI-Fueled Life Sciences Organization Worldwide, 2025* (IDC #US53345625, May 2025)
- *Worldwide GenAI Industry Use Case Early Adoption Trends, 2025: Life Sciences* (IDC #US53317424, April 2025)
- *How Are Life Sciences Organizations Leveraging GenAI for Regulatory Submissions?* (IDC #EUR253211425, February 2025)
- *How Are Life Sciences Organizations Using GenAI for Outcomes-Based Drug Pricing?* (IDC #US52957824, January 2025)

Synopsis

This IDC MarketScape evaluates vendors of worldwide life sciences healthcare provider (HCP) engagement services. These global vendors offer life sciences organizations a mix of business and IT services to support them in the planning, assessment, and implementation of various HCP engagement tools and solutions. This assessment is based on the essential criteria life sciences organizations must consider when selecting partners for their HCP engagement initiatives to maximize the business value of their technology investments.

"As the industry accelerates the shift toward precision medicine and patient-centricity, the ability to effectively identify, target, and engage with healthcare professionals has become a strategic imperative for life sciences organizations. In this race, mastering intelligent, AI-enabled, insight-driven HCP engagement strategies is emerging as a critical success factor in unlocking precision, personalization, and value in provider interactions." — Research Manager Nino Giguashvili, IDC Health Insights Life Sciences Commercial Strategies

ABOUT IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events 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, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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