IDC MarketScape

IDC MarketScape: Worldwide Life Sciences Intelligent Supply Chain Services 2025 Vendor Assessment

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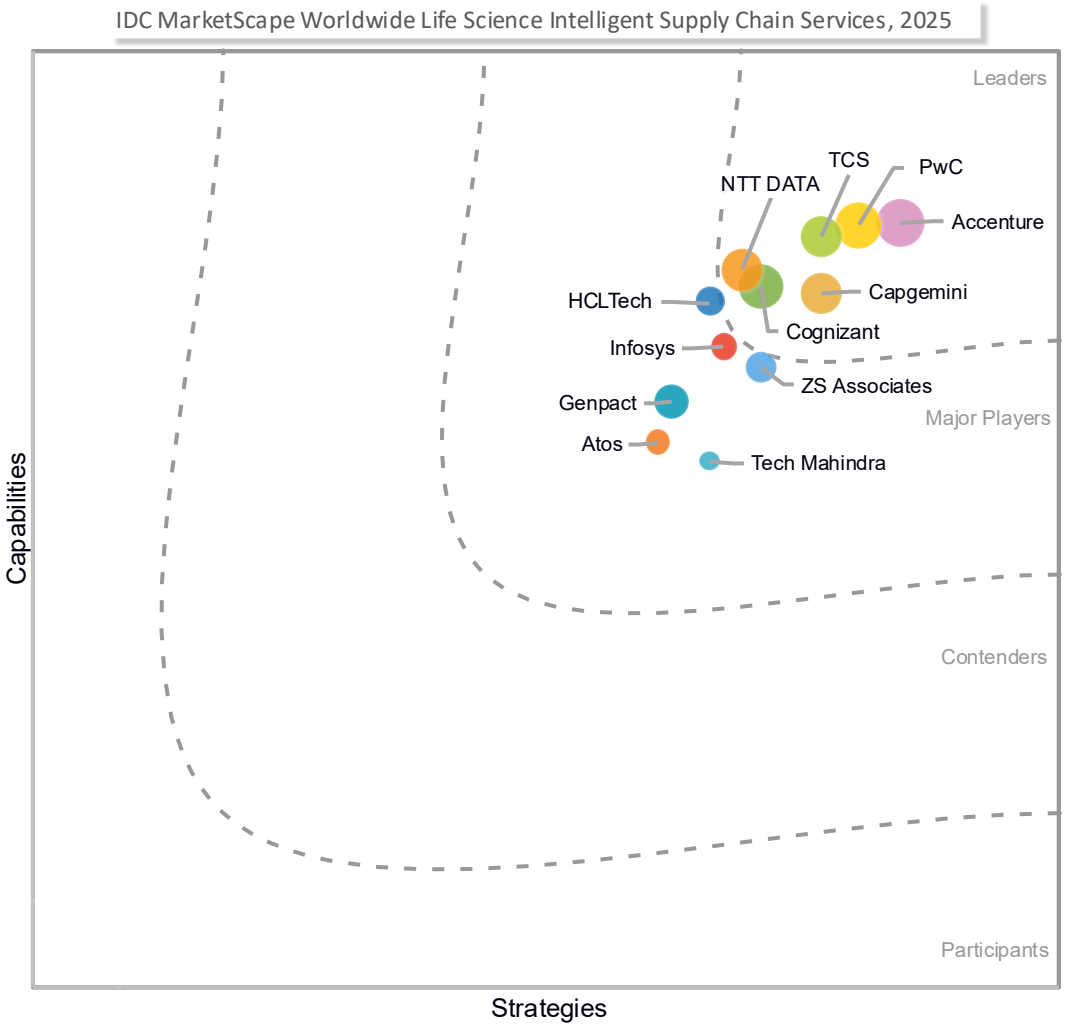
IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Life Sciences Intelligent Supply Chain Services 2025 Vendor Assessment



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

IDC OPINION

Life sciences organizations worldwide are navigating an increasingly complex landscape. As tariffs and reciprocal trade measures escalate amid ongoing geopolitical tensions, economic uncertainty, and regulatory pressures, these organizations face unprecedented supply chain challenges. The industry's heavy reliance on global supply chains has exposed significant vulnerabilities, with rising supplier costs, volatile demand, and shifting trade and compliance requirements emerging as critical concerns for pharmaceutical, biotech, and medical device organizations.

For life sciences organizations, mitigating supply chain risks and enhancing resilience increasingly depend on supply diversification, improved operational efficiencies, and enhanced supply chain agility and end-to-end visibility. A lack of supply chain visibility and agility was identified as the most pressing challenge by nearly 50% of life sciences respondents in IDC's 2025 *Supply Chain Survey* (April 2025). To this end, life sciences organizations are actively integrating AI-driven solutions, advanced technologies, and intelligent capabilities to enable intelligent decision-making, automation, real-time visibility, and end-to-end orchestration across the supply chain.

However, limited digital competencies, gaps in data and analytics capabilities, and the complexity of integrating new technologies with existing infrastructure continue to hinder organizations' supply chain transformation efforts. In the same survey, over one-third of life sciences organizations globally cited a lack of digital skills and analytics expertise as a critical gap that must be addressed with great urgency.

Fast-evolving regulatory requirements, rising customer and patient expectations, and increasing supply chain management complexities driven by the introduction of innovative medicines and emerging precision therapies (e.g., cell and gene therapies [CGT] and advanced biologics) underscore the need for manufacturers to intensify their efforts in enhancing supply chain agility and resilience.

This is fueling demand for intelligent supply chain services that can support life sciences organizations in bridging critical gaps in technology, skills, and capabilities to achieve intelligent, resilient, and patient-centric supply chain operations across increasingly complex global supply chain networks.

This IDC MarketScape evaluates vendors of intelligent life sciences supply chain services that support life sciences organizations in the planning, assessment, and implementation of various supply chain management tools and solutions to help them drive intelligent supply chain transformation.

All vendors evaluated in this study have strong global delivery capabilities across key life sciences market subsegments and offer a rich portfolio of intelligent supply chain services. They share a common focus on addressing the industry's growing supply chain needs for enhanced efficiency, cost optimization, end-to-end traceability, and regulatory compliance. Furthermore, they all demonstrate a significant commitment to strengthening their AI-driven capabilities and integrating advanced digital technologies — such as generative AI (GenAI), agentic AI, Internet of Things (IoT), and digital twins — to accelerate innovation and enable intelligent supply chain operations.

While all vendors evaluated in this study exhibit strong technology capabilities, they vary in the depth and breadth of their ecosystem partnerships, industry specialization, business service capabilities, regulatory expertise, and focus across supply chain management (SCM) and life sciences functional areas. Opportunities for improvement remain for vendors in areas such as refining customer engagement strategies, sharpening industry-specific market messaging, and aligning their offerings to better meet the needs of smaller organizations and those seeking more cost-flexible, targeted support in niche areas.

As industry expectations rise, life sciences customers are demanding deeper industry-specific and regulatory expertise; stronger value demonstration; greater support in strategic planning, operational improvement, and change management; and more proactive innovation delivery that aligns closely with the unique regulatory and operational complexities of life sciences supply chains in the emerging paradigm of personalized and precision medicine.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

This IDC MarketScape evaluates professional services vendors who provide IT and business services to support life sciences organizations in the planning, assessment, and implementation of various supply chain management tools. This enables life sciences organizations to make intelligent supply chain decisions and maximize the business value of SCM technology investments.

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

- The vendor must have a global presence, serving life sciences customers in at least two global regions (Europe, North America, Asia/Pacific, Latin America, or the Middle East and Africa).
- The vendor must be offering both IT and business services to life sciences organizations to support them in the planning, assessment, and implementation of various supply chain management tools and solutions.

- The vendor must have a minimum annual revenue of $1 billion. At least 20% of the vendor's revenue must be generated from IT services and at least 5% from business services, rendered across all industries.
- The vendor must be offering a mix of systems implementation and integration, strategic business consulting, and business process outsourcing (BPO) services across a broad range of SCM areas and functions.
- The vendor must have at least 10 years of experience in life sciences and at least 10 life sciences customers for its supply chain services.

Twelve vendors qualified for inclusion in this IDC MarketScape for Worldwide Life Sciences Intelligent Supply Chain Services 2025:

- Accenture
- Atos
- Capgemini
- Cognizant
- Genpact
- HCL
- Infosys
- NTT Data
- PwC
- TCS
- Tech Mahindra
- ZS

ADVICE FOR TECHNOLOGY BUYERS

The evolving life sciences landscape is marked by escalating cost pressures, shifting trade policies, growing regulatory complexities, and evolving therapeutic paradigms; this demands new levels of supply chain agility and resilience. In this new paradigm, embedding intelligence across the supply chain life-cycle is becoming imperative for life sciences organizations.

As pharmaceutical, biotech, and medical device organizations accelerate efforts to modernize and future-proof their supply chains, the choice of the right technology and services partners presents a significant challenge. This research suggests the key attributes life sciences organizations should consider when selecting intelligent supply chain services partners include:

- **Deep industry experience and expertise:** In-depth industry knowledge and established experience in managing industry-specific supply chain processes (e.g., clinical trial logistics, serialization, and cold chain management) alongside

deep regulatory expertise and robust frameworks to enable regulatory compliance with stringent industry standards and regulations

- **Value demonstration and time to value:** Demonstrated ability to deliver measurable business outcomes at speed and scale, including enhanced supply chain visibility, accelerated implementation timelines, improved cost efficiency, and sustained operational performance
- **Global delivery capabilities and scalability:** Strong capabilities to manage operational complexities across global supply chain networks, supporting both large-scale, enterprise-wide transformation initiatives and targeted operational requirements through scalable resources and localized expertise
- **Customer-centricity and end-to-end support:** The ability to deliver end-to-end services from strategic planning to execution — including managing associated organizational, operational, and cultural changes — through flexible customer-centric engagement models that can adapt to support focused applications in smaller-scale or budget-limited engagements
- **Proactive innovation delivery:** Proven expertise in innovative technologies (including AI, GenAI, digital twins, and IoT), complemented by a proactive approach to innovation delivery, consistently anticipating customers' needs, enabling co-innovation, and ensuring alignment with emerging market trends

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 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 intelligent supply chain services.

Founded in 2001 and headquartered in Dublin, Ireland, Accenture is a publicly owned company with a global workforce of over 770,000 employees, serving clients in more than 120 countries. It has over 35 years of experience in the life sciences industry and its life sciences practice comprises more than 22,000 dedicated life sciences professionals. Accenture serves a diverse range of life sciences clients, including most of the prominent global companies in the pharmaceutical, biotech, and medical device segments. 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.

Core Value Proposition

Accenture offers a broad range of intelligent supply chain services tailored to the needs of life sciences organizations, encompassing comprehensive offerings in strategy and transformation consulting, systems implementation and integration, and business process outsourcing. With over 45,000 supply chain practitioners, Accenture demonstrates robust capabilities in all major supply chain functions and supports a wide variety of vendors in the SCM space, including (but not limited to) SAP, Oracle, BlueYonder, Dassault, Kinaxis, Korber, Manhattan, Microsoft, and o9.

Accenture emphasizes an integrated approach to supply chain transformation and adopts a multi-disciplinary model spanning supply chain, manufacturing, R&D, regulatory, and quality functions to enable end-to-end transformation across the enterprise. The company has demonstrated success in large-scale global ERP transformations, including a recent engagement with a major global pharma company involving the consolidation of more than 3,000 applications and more than 600 processes across 220 SAP systems. By harmonizing the digital core and implementing solutions for supply chain traceability, integrated development, order management, and asset management, Accenture helped the client enhance quality and risk management, improve agility, accelerate time to market, and reduce costs. It also supports companies with specialized SCM capabilities, including cold chain management, serialization, and the management of cell and gene therapies.

Accenture's customer service delivery model combines structured methodologies, domain-specific accelerators, a global delivery network, and a multidisciplinary team approach. The company's delivery methodology emphasizes 360-degree customer value, ensuring that transformation initiatives are aligned with client objectives, including measurable outcomes related to financial, innovation, and sustainability performance. Accenture leverages its "compressed transformation" framework to help customers drive speed to launch, operational excellence, and reinvention. Its Transformation Office, built on its proprietary Accenture Momentum platform, helps orchestrate, control, and measure large-scale initiatives, track value realization across supply chain programs, and support close alignment with business objectives. This delivery foundation helps customers accelerate execution, minimize risks, and ensure local adaptability, enabling them to build intelligent, patient-centric supply chain networks and drive sustainable and scalable transformation.

Accenture places a strategic focus on embedding innovation into delivery, integrating innovative technologies such as GenAI and AI agents to enable intelligent supply chain operations for its life sciences customers and address growing supply chain complexities in emerging areas such as personalized medicine, decentralized clinical trials, and innovative therapies.

To support this vision, Accenture makes notable investments in its internal capabilities. The company has committed over $3 billion to its Data & AI practice, with a strong emphasis on scaling the use of GenAI and agentic AI across industries,

including life sciences. To enable supply chain orchestration, real-time visibility, automation, and intelligent SCM decision-making, Accenture has developed several advanced proprietary tools such as the N-Tier Supply Chain Navigator (which integrates internal and external data to assess and mitigate supplier risks) and Unified Demand Planning, which applies ML to unstructured data to generate demand insights. Its multi-agentic AI architecture is designed to enable autonomous supply chain execution, while GenAI integration supports predictive analytics and intent-driven workflows.

Accenture further leverages its robust ecosystem strategy to accelerate innovation and enhance its SCM offerings and capabilities, including a focused partnership with Kinaxis to co-develop assets and drive advancements in supply chain planning and execution. Along with its alliances with SCM vendors listed above, the company maintains strategic partnerships with major global technology platform players such as AWS, Google Cloud, and Microsoft. Accenture also actively collaborates with a diverse set of niche and emerging vendors (e.g., Apprentice.io, QbD Vision, Pangaea Life Science Solutions, Manhattan, MultiplyLabs, Parkour, and TrakCel).

Strengths

Accenture combines comprehensive supply chain services offerings with extensive industry expertise and innovation capabilities to support life sciences organizations in intelligent supply chain transformation. Accenture has been recognized for:

- **Depth and breadth of industry expertise aligned with the evolving industry landscape:** With over three decades of experience in life sciences, Accenture's expertise extends to multiple life sciences segments and functional areas. Customers value the company's deep knowledge and understanding of industry trends and challenges. Its depth of expertise allows it to provide tailored services to life sciences clients, aligned with fast-evolving operational and regulatory requirements and specific complexities in the emerging life sciences supply chain landscape.
- **AI-driven innovation capabilities:** Accenture maintains a strategic focus on integrating advanced AI technologies to enhance intelligent supply chain services and enable scalable AI-driven orchestration for complex, multi-modal supply chains. The company's strong capabilities in AI, GenAI, and agentic AI enable it to support life sciences customers in intelligent decision-making and automation across all major SCM functions within complex global supply chain networks.
- **Integrated, customer-centric transformation approach:** Accenture emphasizes an integrated approach to supply-chain transformation across SCM and business functions to deliver 360-degree business value. Customers recognize Accenture for its responsiveness, flexibility, and outcome-oriented approach. By leveraging structured service delivery methodologies and frameworks and industry-specific accelerators, Accenture helps customers

orchestrate large, enterprise-wide supply chain transformations while ensuring strong alignment with specific business objectives.

- **Robust ecosystem strategy and commitment to innovation:** Ecosystem innovation is central to Accenture's innovation strategy. The company effectively leverages strategic alliances with a diverse set of global technology vendors and niche and emerging startups. These partnerships — combined with its academic collaborations and dedicated innovation centers and centers of excellence worldwide, including centers in Dublin, Boston, Barcelona, Bangalore, and Singapore — enable Accenture to address evolving supply chain complexities with tailored capabilities and services.

Challenges

While Accenture excels in delivering intelligent supply chain services tailored to the life sciences market, IDC believes its value proposition for medium-sized life sciences companies may require a more tailored approach with more modular, cost-flexible offerings. Accenture could also benefit from further strengthening its marketing efforts to highlight more prominently its distinct value proposition for life sciences supply chain services.

Consider Accenture When

Life sciences organizations should consider Accenture when seeking a trusted partner for enterprise-wide supply chain transformation across multiple life sciences functional areas that require complex integrations on a global scale. Accenture is fully equipped to serve life sciences organizations that focus on embedding innovative technologies such as GenAI, agentic AI and digital twins into their supply chain operations, enabling intelligent demand planning, supplier risk management, and supply chain automation capabilities. It is an ideal choice for companies prioritizing regulatory compliance and patient safety in their supply chain operations, including those facing specialized complexities associated with cold chain monitoring and personalized medicines supply chain management.

Atos

After a thorough evaluation of its offerings and capabilities, IDC has positioned Atos in the Major Players category in this 2025 IDC MarketScape for worldwide life sciences intelligent supply chain services.

Atos was founded in 1997. Headquartered in Bezons, France, it operates in 69 countries with a global workforce of more than 80,000 employees. The company has been serving the life sciences industry for over 20 years, supported by a dedicated team of approximately 2,600 professionals. More than 80% of its life sciences supply chain services customers are based in North America, with the remainder located in Europe.

Core Value Proposition

Atos offers strong supply chain services expertise to support life sciences organizations in their supply chain transformation initiatives through implementation and integration services, strategy and transformation consulting, and selected BPO services.

Atos has established partnerships with several vendors in the supply chain space, most extensively with SAP, Microsoft, and Dassault. Atos offers a range of tools and accelerators to enable scalable SAP implementations.

Atos's offerings and services are rooted in its deep technology expertise and extensive experience in sustainable digital transformation. Through its technology-first approach and combined with Eviden's capabilities, Atos offers extended capabilities across cloud, AI, and digital platforms, as well as cybersecurity and innovative technologies such as AI, GenAI, agentic AI, digital twins, and high-performance computing.

Atos's customer service delivery model emphasizes compliance, agile development practices, and co-innovation with clients. Its consulting teams work closely with clients to tailor solutions to specific regulatory and operational needs. Atos supports life sciences organizations across all major supply chain functions, from planning to distribution, in areas including (but not limited to) demand and supply planning, inventory optimization, warehouse management, transportation, and global trade compliance.

Atos has demonstrated strong capabilities in supporting life sciences companies across SCM areas such as serialization and track and trace, cold chain monitoring and transportation management for temperature-sensitive products, and the management of clinical supply chains across large, global supply chain networks while supporting regulatory compliance (including GxP standards and global trade compliance).

In its engagements with life sciences customers, Atos leverages proprietary platforms that integrate advanced technologies to address specific supply chain complexities. Its Intelligent Supply Chain (ISC) suite includes applications such as Precise Time of Arrival (PTA), Route Optimization, and In-Transport Visibility, which support life sciences customers with warehouse and production planning, logistics performance, and route optimization for temperature-sensitive products. For example, Atos supported a pharmaceutical customer in leveraging an AI-based ETA prediction system to improve delivery accuracy by more than 60%, using its advanced PTA technology that integrates multimodal external data sources. Atos also offers Kit Deployment Services to help manage the complex logistics of clinical supply chains. Other specialized offerings include an IoT-based cold chain monitoring solution for vaccines and biologicals and the blockchain-enabled TruCycle Product Passport solution for end-to-end traceability. Atos has also supported its life sciences clients in piloting agentic AI applications in procurement and order management.

Atos leverages a broad network of strategic partnerships to enhance its supply chain offerings and services. In addition to its established partnerships with SCM players, it maintains strategic alliances with all major global technology and cloud platform providers. The company's specialized partnerships in the industry include collaborating with Eupry on cold chain monitoring solutions and with Siemens to develop advanced digital manufacturing and AI-driven solutions for life sciences.

The company demonstrates a strong commitment to innovation through strategic investments in AI, quantum computing, and high-performance computing (HPC). It operates dedicated innovation labs and quantum facilities and maintains a Life Sciences Centre of Excellence (COE) in the UK to accelerate life sciences innovation. Atos is a prominent player in terms of HPC and leads the EuroHPC JUPITER project via its subsidiary Eviden, developing Europe's first exascale supercomputer to support scientific research, including in life sciences. The company also collaborates with research institutions and startups and participates in large-scale research programs, including quantum hybridization.

Strengths

Atos brings together advanced technology capabilities, global delivery capabilities, and deep digital transformation expertise to support intelligent supply chain transformation for life sciences organizations. Atos has been recognized for:

- **Advanced technology capabilities and innovation focus:** Atos demonstrates deep technology expertise and a strong commitment to innovation. The company invests substantially in emerging technologies such as AI, digital twins, blockchain, and HPC. Its advanced capabilities across cloud platforms and cybersecurity further enhance its ability to deliver secure, scalable transformation toward future-ready supply chains. The company is also a prominent player in the HPC field, delivering supercomputing solutions for scientific and industrial applications, including life sciences.
- **Strong supply chain digital transformation expertise:** Atos has various specialized capabilities to address life sciences supply chain challenges, including cold chain monitoring, serialization, and clinical trial logistics. These are complemented by advanced cybersecurity and regulatory compliance capabilities, positioning the company as a strong partner for supply chain transformation initiatives, especially within SAP environments. Atos has deep experience in SAP integrations and has developed a suite of accelerators, including its Advanced Preconfigured Solution (APS).
- **Global delivery capabilities aligned with regulatory needs:** Atos offers the industry substantial global delivery capabilities. Its cross-border expertise and dedicated life sciences centers of excellence enable it to serve customers globally with tailored support. Atos has demonstrated the ability to manage complex supply chain networks; for example, it handled clinical supply chain logistics for a major global pharma company across more than 50 countries, reducing time and distribution costs by over 20% while ensuring regulatory compliance.

- **Strong focus on sustainability enablement:** Atos strongly emphasizes sustainability. The company integrates sustainability services into its digital transformation offerings and offers a range of decarbonization solutions to help clients reduce their supply chain carbon footprint, including Scope 1, 2, and 3 emissions. These capabilities enable clients to align with their ESG and sustainability goals and meet growing ESG expectations and regulatory requirements.

Challenges

While Atos demonstrates advanced technology capabilities, deep supply chain expertise and strong global delivery potential, its presence in the life sciences supply chain services market remains limited. IDC believes Atos would benefit from expanding its business consulting capabilities to support enterprise-wide transformation initiatives that require significant change management efforts and high levels of digital maturity. It could strengthen its positioning by expanding its partnerships with a broader ecosystem of SCM solution vendors. Additionally, the company should enhance its marketing efforts to improve the visibility of its life sciences-specific capabilities to expand its market footprint.

Consider Atos When

Atos's digital transformation expertise and extended technology capabilities positions it as a valuable partner for organizations seeking to modernize their supply chains on a global scale while safeguarding security and compliance. Life sciences organizations should consider Atos when seeking a partner with advanced technology capabilities to embark on complex transformation initiatives, particularly multinational companies operating large supply chain networks. The company is a strong choice for organizations looking to deploy cutting-edge technologies such as AI, digital twins, and blockchain and intelligent supply chain capabilities that can integrate with SAP environments. It is also a good fit for companies prioritizing sustainability and compliance with serialization and traceability regulations.

Capgemini

After a thorough evaluation of its offerings and capabilities, IDC has positioned Capgemini in the Leaders category in this 2025 IDC MarketScape for worldwide life sciences intelligent supply chain services.

Capgemini was founded in 1967. Headquartered in Paris, France, it operates in over 50 countries with approximately 340,000 employees. Capgemini has served the life sciences industry for more than 35 years, with over 17,000 subject matter experts supporting life sciences organizations across North America, Europe, and the Asia/Pacific region, including most prominent global life sciences companies.

IDC notes that this evaluation is based on publicly available information and its existing knowledge of the company.

Core Value Proposition

Capgemini offers a comprehensive range of services to support intelligent supply chain transformation for pharmaceutical, biotech and medical device organizations. Its range of services includes strategy and transformation consulting, systems implementation, and selected BPO services.

Capgemini's end-to-end supply chain services, deep technology expertise, and engineering capabilities allow it to support life sciences companies in the planning, assessment, and implementation of various SCM tools across all major supply chain functions, from planning to distribution and fulfillment. Capgemini partners with several vendors in the SCM space, most extensively with SAP. Other vendors include Oracle, Blue Yonder, Kinaxis, Manhattan, Coupa, Anaplan, and o9. As a global integration partner for SAP, Capgemini offers a full range of services to support life sciences customers in their SAP journey. Capgemini's 2024 acquisition of Syniti has strengthened its capabilities in platform and migration services, particularly for large-scale SAP transformations.

Capgemini's services approach is guided by its integrated life sciences vision, which emphasizes integrating business, technology, and data to accelerate innovation and improve patient outcomes. Capgemini views building Digital Core, supported by comprehensive cloud and cybersecurity services, as the foundation for an intelligent enterprise. Its service delivery model is grounded in its transformation-led approach that emphasizes end-to-end business transformation by leveraging user-oriented approaches and data-driven innovation to deliver scalable, sustainable, and measurable outcomes. This approach helps maximize the business value of supply chain investments. To deliver tailored support, Capgemini orchestrates its cross-industry and technology capabilities through its Intelligent Industry approach to help life sciences companies leverage innovative technologies such as AI, ML, and IoT across diverse operational areas.

Combining its SCM expertise with life sciences experience and industry-specific assets, Capgemini has supported life sciences customers in areas such as track and trace, control tower orchestration, and sustainability. The company's regulatory expertise and experience enable it to address the complex supply chain needs arising from growing regulatory pressure and emerging trends in the industry, including the complexities associated with advanced therapies and personalized medicine.

AI-driven innovation is a core pillar of Capgemini's innovation strategy. The company leverages its Reliable AI Solution Engineering (RAISE) platform to scale generative AI use cases. In 2023, it committed $2.2 billion over three years to enhance its AI capabilities through partnerships with Microsoft, Google, AWS, Salesforce, and Mistral AI. This investment also includes workforce training, with over 120,000 employees trained in GenAI capabilities. Furthermore, the company leverages a dedicated Life Sciences program at Capgemini University to support industry growth and skills development.

Capgemini has also developed a strong network of centers of excellence to help its customers realize the benefits of emerging technologies. Capgemini's specialized divisions — the Capgemini Research Institute, Capgemini Engineering, and Capgemini Invent — further support AI innovation across industries.

Strengths

Capgemini combines deep industry and technology expertise with robust innovation capabilities to support life sciences organizations in their intelligent supply chain transformation initiatives. Capgemini has been recognized for:

- **Deep industry and SCM technology expertise:** Capgemini has strong experience in delivering supply chain transformation projects at scale, with particularly deep capabilities and experience in the SAP ecosystem. The company leverages its SCM vendor partnerships, industry-tailored accelerators, and deep industry expertise — backed by strong capabilities in AI, engineering services, regulatory compliance and cybersecurity — to support complex supply chain transformation initiatives in life sciences.
- **Strong innovation infrastructure:** Capgemini has developed a robust innovation infrastructure to enable continuous development of its internal capabilities and help life sciences organizations benefit from emerging technologies and drive innovation in their supply chain management operations. Its investments in AI-driven technologies, partnerships, and innovation ecosystems mean the company is well equipped to support life sciences customers in their intelligent supply chain transformation journeys.
- **Transformation-led Intelligent Industry approach for business value maximization:** Capgemini's business transformation-led approach helps its customers address the various aspects of supply chain transformation to deliver scalable outcomes, aligning with broader business objectives to maximize the value of supply chain investments. Through its "Intelligent Industry" framework, the company further leverages its cross-functional expertise to enable customers to use innovative technologies for intelligent supply chain transformation.
- **Customer engagement focus:** Capgemini emphasizes a collaborative and human-centered approach to customer service delivery. It leverages structured processes to gain a deep understanding of customers' needs and facilitate user engagement and collaboration to maximize business outcomes.

Challenges

While Capgemini offers a comprehensive set of capabilities to support supply chain transformation initiatives, price sensitivity remains a barrier for some life sciences organizations, particularly in the medium-size segment, with budget constraints and/or supply chain projects of limited scope. IDC believes Capgemini should refine its supply chain services offerings for this segment and adopt more flexible pricing models. Capgemini could also benefit from enhancing its business advisory capabilities and adopting a more proactive approach to innovation delivery.

Consider Capgemini When

Life sciences organizations should consider Capgemini when looking for a trusted partner with deep technology and industry expertise to drive their supply chain modernization initiatives with multiple partner ecosystems on a global scale. Capgemini is well positioned to assist life sciences organizations seeking a partner with robust AI, cybersecurity, regulatory, and sustainability expertise. Capgemini is particularly suitable for organizations that seek to deploy AI and IoT-enabled solutions to foster intelligent decision-making, end-to-end traceability, regulatory compliance, and sustainability.

Cognizant

After a thorough evaluation of its offerings and capabilities, IDC has positioned Cognizant in the Leaders category in this 2025 IDC MarketScape for worldwide life sciences intelligent supply chain services.

Founded in 1994, Cognizant is a public company headquartered in Teaneck, New Jersey, with a workforce of over 335,000 employees in more than 35 countries. It has been providing supply chain services to the life sciences industry for more than two decades, and its customer base includes many prominent life sciences organizations across diverse pharma, biotech, and medical device market segments. Approximately 85% of its life sciences clients are based in North America and Europe, with a growing presence in Asia/Pacific, Latin America, and other regions.

Core Value Proposition

Cognizant offers end-to-end supply chain services to life sciences organizations. Its services span strategic consulting, systems implementation and integration, and BPO services. Cognizant has extensive partnerships with most of the supply chain vendors in the market, including SAP, Oracle, Blue Yonder, Kinaxis, IBM Sterling, Microsoft, Coupa, o9, and Manhattan. The company also leverages its proprietary platforms (e.g., its Digital Twin Platform, Neuro AI, and Conversational AI) to enable its intelligent supply chain transformation engagements.

Cognizant leverages an integrated global delivery model, comprising over 41,000 life sciences professionals and approximately 13,000 supply chain specialists, to support large-scale supply chain initiatives across global operations. For instance, the company assisted a major U.S.-based pharma in deploying Coupa solutions across 49 countries, streamlining contract management and procurement processes; this resulted in a 70% reduction in invoice integration errors and significant improvements in order cycle times.

Cognizant applies structured methodologies and best practice frameworks to service delivery, with an emphasis on client engagement, change management, and continuous improvement. To help customers with deployments and adoption and to maximize value, the company develops tools and accelerators through its centers of

excellence, leveraging its organizational change management (OCM) approach for adapting processes, technology, and people. This enables it to support end-to-end supply chain integration and intelligent transformation needs across a broad set of SCM functions, from planning to fulfillment. For example, it helped a global pharma company to address supply chain fragmentation in more than 75 countries. The engagement includes implementing an integrated supply chain strategy with technology and sustainability roadmaps, CMO collaboration tools, and IoT-enabled cold chain monitoring; this engagement is expected to drive sizable reductions in inventory and freight insurance costs.

Cognizant's deep industry knowledge and innovation focus enables it to address growing supply chain complexities in a patient-centric landscape. Its regulatory expertise further enables it to support life sciences organizations in achieving compliance with fast-evolving regulatory requirements for GxP, end-to-end visibility, and traceability. For example, Cognizant provided a major global pharma company with comprehensive serialization support across jurisdictions, managing a complex application landscape including SAP ATTP, SAP ICH, TraceLink, Sea Vision, and Optel. This engagement ensured compliance with serialization and traceability requirements under the EU FMD and US DSCSA, as well as regulations in other countries and regions, including China, Saudi Arabia, and Eastern Europe.

Cognizant demonstrates a strong commitment to innovation and workforce development. The company operates four global AI Innovation Studios and has trained over 25,000 associates in GenAI technologies. Its Synapse initiative is aimed at training 1 million individuals in digital and AI technologies by the end of 2026. Cognizant integrates emerging technologies such as AI, GenAI, IoT, and digital twins into its solutions and is expanding AI applications in supply chains, including agentic AI for supply chain orchestration. Its roadmap emphasizes advancing supply chain analytics, expanding GenAI capabilities, and strengthening regulatory expertise and patient safety.

Cognizant also maintains a robust partner ecosystem. Beyond partnerships with major SCM players, it has a growing network of collaborations with niche players (e.g., Blue Yonder, Manhattan, and Kinaxis) and specialized industry vendors (e.g., Medidata and Veeva Systems). These partnerships enable Cognizant to further enhance its life sciences supply chain service offerings and capabilities and drive innovation.

Strengths

Cognizant integrates strong supply chain services expertise with deep industry experience and customer-centric delivery capabilities to provide life sciences organizations with comprehensive supply chain transformation services. Cognizant has been recognized for:

- **Strong balance of technology and life sciences expertise:** With an extensive team of more than 41,000 life sciences and over 13,000 supply chain specialists, Cognizant offers comprehensive supply chain services through a unified approach that integrates strong industry knowledge with deep supply chain technology capabilities. Cognizant's capabilities enable clients to select and implement a broad inventory of SCM applications to drive supply chain transformation on a global scale. The company also strongly emphasizes enabling sustainability; it has developed specialized accelerators for sustainability enablement that encompass Scope 3 decarbonization strategies.
- **Customer-centric delivery for value maximization:** Cognizant's delivery model emphasizes customer orientation, user adoption, and continuous improvement. It leverages proven methodologies and best practices to drive user adoption and business outcomes. Clients value Cognizant's flexibility, proactive engagement, readiness to go the extra mile, and focus on business outcomes "at a fair price."
- **Strong ecosystem and innovation strategy:** Cognizant fosters innovation through a robust ecosystem of technology partners and substantial investments in innovation capabilities and infrastructure. The company operates four global AI innovation centers and has trained over 25,000 associates in GenAI. Cognizant's innovation strategy also includes a growing library of supply chain-specific GenAI use cases.
- **Deep regulatory expertise aligned with emerging industry imperatives:** Cognizant offers its life sciences customers rigorous regulatory expertise. The company's approach to regulatory compliance is integral to its value proposition, with a particular focus on ensuring adherence to global standards (e.g., GxP standards, serialization and traceability, and data integrity requirements). Cognizant has extensive experience guiding customers through complex compliance-driven supply chain transformation projects across multiple jurisdictions.

Challenges

While offering comprehensive services, Cognizant's scale may introduce complexities for some customers who require support in highly specialized areas with limited scope, including accessing the company's resources across local sites. IDC believes Cognizant may strengthen its positioning by forging further industry partnerships in specialized life sciences areas and tailoring its offerings to better address the needs of mid-tier life sciences companies. Cognizant could also benefit from expanding its business services capabilities.

Consider Cognizant When

Cognizant is a trusted partner for life sciences organizations with complex, global supply chain operations. It is particularly suitable for companies seeking to

modernize their supply chain operations across multi-platform environments and planning large-scale, multi-vendor, multi-country supply chain transformation initiatives. Cognizant is a strong choice for companies requiring a cost-competitive partner for compliance-driven supply chain transformation projects, particularly for serialization projects focused on the US and EU markets. The company is also an optimal choice to support supply chain transformation projects for organizations undergoing mergers, acquisitions, or divestitures.

Genpact

After a thorough evaluation of its offerings and capabilities, IDC has positioned Genpact in the Major Players category in this 2025 IDC MarketScape for worldwide life sciences intelligent supply chain services.

Genpact, originally founded as a business unit of General Electric, became an independent entity in 2005. Headquartered in New York City, it employs more than 140,000 people in over 35 countries. Genpact has been serving the life sciences industry for more than two decades. With a dedicated team of more than 10,000 employees, the company serves industry organizations in diverse market sub-segments worldwide.

IDC notes that this evaluation is based on publicly available information and its existing knowledge of the company.

Core Value Proposition

Genpact provides comprehensive supply chain IT services to support life sciences organizations in planning, assessing, and implementing various supply chain management tools across all major supply chain functions. The company's services include strategy and transformation consulting, implementation and integration, and BPO services, with BPO representing a significant portion of its supply chain engagements.

Genpact maintains strategic partnerships with major SCM technology vendors and supports a broad range of supply chain applications, including SAP, Oracle, Kinaxis, Blue Yonder, o9, e2open, and TraceLink. The company has supported multiple life sciences companies in complex transformations including global SAP S/4HANA rollouts, yielding improved workforce productivity, operational efficiency, and cost savings.

Genpact has specialized centers of excellence for life sciences and supply chain management. Its life sciences practice includes dedicated subject matter experts with deep industry expertise. The company's team of supply chain professionals operates in a matrix model in collaboration with life sciences teams to support clients in transforming supply chain operations across diverse functions, including demand forecasting and planning, inventory optimization, logistics and distribution management, regulatory compliance and reporting, and clinical trial supply chain orchestration.

Genpact helps life sciences customers address emerging challenges in areas such as clinical trial supply chain planning, serialization, and track and trace. It has also developed proprietary solutions such as Cora OrderAssist for AI-enabled order management and advanced analytics platforms for demand sensing and inventory optimization. Genpact collaborates with Kinaxis on clinical supply chain planning tools.

To support customer service delivery, Genpact leverages several proprietary frameworks and methodologies, including the enabling transformation alignment (ETA) framework for business alignment and smart enterprise processes (SEP) methodology to standardize supply chain and regulatory workflows.

Genpact's regulatory expertise enables it to support compliance-driven supply chain initiatives. The company has established a strategic partnership with TraceLink for digital supply chain solutions designed to help life sciences customers improve end-to-end visibility, enhance predictability, and drive resilience and compliance across their supply chains.

Accelerating AI-led innovation is a major part of Genpact's strategic roadmap. The company is investing in emerging technologies such as digital twins, GenAI, and ML. It also leverages its global network of innovation centers, including a dedicated AI Innovation Center in London, to accelerate innovation. Genpact's innovation strategy emphasizes AI-driven capabilities for supply chain transformation, including agentic AI, predictive analytics, and autonomous supply chain operations.

To support its innovation efforts and enhance its industry-specific services and offerings, Genpact maintains strong partnerships with major global technology providers, as well as specialized life sciences vendors such as Veeva, Medidata, and TraceLink.

Strengths

Genpact offers a strong balance of industry experience, business consulting capabilities, and technology expertise to support intelligent supply chain transformation initiatives for life sciences organizations. Genpact has been recognized for:

- **Deep life sciences industry expertise:** Genpact offers deep life sciences expertise through a dedicated team of over 10,000 professionals serving life sciences companies globally. The company has established specialized capabilities and has successfully delivered complex transformations in multiple engagements with life sciences customers. Genpact's industry expertise spans the entire life sciences value chain life cycle and is backed by deep regulatory knowledge.
- **Experience in large-scale complex transformations:** Genpact has demonstrated success in supporting global life sciences organizations through end-to-end supply chain transformation initiatives. These

engagements have delivered measurable outcomes in terms of enhanced forecast accuracy, strengthened regulatory compliance, sizable cost reductions, and greater operational efficiency.

- **Strong AI and technology capabilities:** Genpact demonstrates strong expertise in AI-driven supply chain transformation and invests continually in developing its AI/ML and advanced analytics capabilities. The company operates dedicated AI Innovation Centers and is developing proprietary AI solutions for supporting intelligent supply chain management and autonomous operations.
- **Multi-ecosystem capabilities:** Genpact's extensive partner ecosystem encompasses most of the supply chain application vendors available on the market. Genpact has demonstrated strong capabilities in delivering large-scale, complex supply chain transformations across multi-vendor environments.

Challenges

Genpact faces challenges in differentiating its life sciences-specific value proposition in an increasingly competitive market. While the company has strong partnerships, broad services and innovation capabilities, it needs to continue developing deeper specialization to address life sciences organizations' evolving needs in areas such as personalized medicine supply chains and regulatory requirements. The company must balance its multi-industry approach with the deep specialization required for evolving life sciences supply chain challenges.

Consider Genpact When

Life sciences organizations should consider Genpact when seeking a partner for end-to-end supply chain transformation that combines deep industry experience with strong AI and analytics capabilities. Genpact is particularly suitable for global life sciences organizations requiring complex, multi-vendor technology integrations and regulatory compliance support across multiple geographic regions. It is also a strong choice for companies prioritizing initiatives in demand forecasting and planning, procurement optimization, clinical trial supply chain orchestration, and regulatory compliance, including serialization and track-and-trace.

HCLTech

After a thorough evaluation of its offerings and capabilities, IDC has positioned HCLTech in the Major Players category in this 2025 IDC MarketScape for worldwide life sciences intelligent supply chain services.

Founded in 1976 and headquartered in Noida, India, HCLTech has a network of more than 200 delivery centers operating in 60 countries. The company has a global workforce of more than 220,000 employees; its Life Sciences and Healthcare practice includes more than 30,000 professionals and has served the life sciences

industry for more than 25 years. HCLTech's client base includes many prominent pharmaceutical, biotech, and medical device companies. The majority of its life sciences customers are based in North America and Europe.

Core Value Proposition

HCLTech offers life sciences organizations integrated services to support them in supply chain transformation initiatives, spanning strategy and transformation consulting, systems implementation and integration, and BPO. The company demonstrates strong capabilities in delivering end-to-end supply chain services and supports a broad range of vendors in the SCM space, including SAP, Oracle, Blue Yonder, Anaplan, Coupa, Kinaxis, Körber, IBM Sterling, Manhattan, Microsoft, e2open, o9 Solutions, and OMP.

These services are delivered through an integrated model that combines technology, process operations, and engineering capabilities. HCLTech's life sciences supply chain practice leverages a large pool of industry experts alongside more than 2,000 supply chain professionals to address customers' needs across various supply chain functions, including y planning, inventory and warehouse management, serialization, order management, procurement, and global trade management. The company's engagements with customers have included tailored supply chain services across various specialized areas (e.g., cold chain management, product serialization, smart labeling, SKU rationalization, lab sample tracking, clinical trial logistics, supply chain management for vaccines and CAR-T therapies, and direct-to-patient logistics).

HCLTech places a strong emphasis on utilizing innovative technologies that integrate AI/ML, GenAI, agentic AI, and digital twin technologies to support intelligent decision-making and compliant supply chain operations. Intelligent Clinical Supply Management (ICSM), co-developed with SAP, supports clinical trial supply planning with AI-based patient dropout prediction capabilities. For example, HCLTech has worked with a major U.S.-based life sciences manufacturer for over two decades, supporting several of its business units across various SCM functions, including demand planning, inventory management, and logistics. This engagement addressed challenges related to fragmented operations, poor data quality, high operating costs, and regulatory compliance. It also established a dedicated manufacturing and supply chain transformation COE for this customer. AI-driven innovation projects are a core component of this initiative, including the deployment of AI-enabled supply chain analytics, visual inspection systems, and digital twins for SCM processes in collaboration with NVIDIA. HCLTech also works with life sciences companies to transform logistics and customs operations, global trade management, and vaccine supply chain operations.

HCLTech has also developed several industry-tailored solutions. These include Smart Labeling, a GenAI-enabled platform for labeling automation and IoT- and blockchain-based solutions for track and trace and cold chain management. HCLTech leverages its integrated Regulatory and Compliance Services Framework to accelerate intelligent transformation while enhancing regulatory compliance.

The company's customer service delivery follows a consult-to-operate methodology to support clients from strategic advisory through execution. Central to its service delivery strategy is its demo-led approach to help life sciences clients engage with prebuilt industry solutions through interactive demonstrations before full-scale deployment. This is complemented by its proprietary Supply Chain Marketplace platform, a broader rollout of which is planned throughout 2025. The platform is designed to showcase AI and GenAI-powered solutions (including those co-developed with partners) such as demand sensing, route optimization, and clinical supply chain planning, allowing customers to trial and select solutions for their specific supply chain needs.

HCLTech's supply chain services innovation roadmap prioritizes the accelerated integration of innovative technologies such as AI, GenAI and agentic AI to expand industry applications, drive automation and intelligent decision-making across supply chain operations, and enable patient-centric life sciences supply chains. The company's innovation efforts are strengthened by its co-innovation initiatives and strategic alliances with prominent ecosystem players, including AWS, Google, Microsoft, and NVIDIA.

Strengths

HCLTech demonstrates comprehensive capabilities in delivering integrated supply chain services across all major life sciences supply chain functions, leveraging deep supply chain services and technology expertise. HCLTech has been recognized for:

- **End-to-end SCM capabilities delivered through integrated services:** HCLTech offers a comprehensive range of supply chain services to life sciences customers, including strategy and transformation consulting, implementation and integration services, and BPO. These services cover all major SCM functions across the life sciences value chain and are delivered through an integrated service model that combines technology, process operations, and engineering services. HCLTech's integrated service model and consult-to-operate methodology enables scalability, cost-efficiency, and regulatory adherence for life sciences customers' global supply chain operations.
- **Forward-looking approach to supply chain transformation:** HCLTech places a strategic emphasis on the integration of innovative technologies (including AI/ML, GenAI, agentic AI, digital twins, IoT, and blockchain) to support patient-centric supply chains and enable the digital transformation of supply chain operations for a diverse range of pharmaceutical, biotech, and medical device customers. HCLTech also effectively leverages strategic alliances with major ecosystem players to accelerate innovation.
- **Enabling compliant supply chain operations with industry-tailored capabilities:** HCLTech integrates its AI-driven capabilities, industry expertise and tailored solutions (e.g., Smart Labeling) and its Compliance and

Regulatory service framework to enable compliant supply chain operations, including global trade compliance, adherence to good distribution practices, serialization, and traceability. For example, it has enabled a major global life sciences company to achieve UDI compliance across 11 sites in five geographies as part of its large-scale supply chain transformation initiative.

- **Demo-led approach for accelerated value:** HCLTech emphasizes a demo-led approach to provide life sciences customers with access to prebuilt, industry-specific solution accelerators and use cases, allowing interactive demonstrations before full-scale deployment. This enables accelerated time-to-value and close alignment with business objectives and regulatory requirements. This approach is further supported by HCLTech's plans for the broader rollout of its Supply Chain Marketplace, designed to provide customers with a unified view of AI-driven supply chain solutions and to serve as a hub for orchestrating and deploying these use cases.

Challenges

While HCLTech demonstrates strong capabilities in delivering integrated, innovation-focused supply chain services, IDC believes the company should refine its engagement strategies with industry organizations to enhance its visibility and expand its global footprint in the life sciences supply chain services market. The company could enhance its market positioning by further expanding its business consulting capabilities and sharpening its marketing approach to better tailor its messages to the specific supply chain requirements and challenges of medium-sized organizations.

Consider HCLTech When

Life sciences organizations should consider HCLTech as a forward-looking partner for their supply chain transformation initiatives. The company is strongly positioned to address complex, global supply chain operations with innovative, AI-enabled, industry-tailored solutions. With deep supply chain management capabilities and life sciences regulatory experience, HCLTech is a reliable partner for organizations pursuing large-scale supply chain transformation across diverse global environments and subsegments, particularly in compliance-driven areas such as cold chain management, clinical trial logistics, unique device identification (UDI), product labeling and serialization, and end-to-end traceability.

Infosys

After a thorough evaluation of its offerings and capabilities, IDC has positioned Infosys in the Major Players category in this 2025 IDC MarketScape for worldwide life sciences intelligent supply chain services.

Founded in 1981, Infosys is a publicly owned company headquartered in Bengaluru, India. It employs over 320,000 people in 56 countries. Infosys has been offering supply chain services to the life sciences industry for the past two decades, with over

12,000 professionals in its life sciences practice dedicated to serving life sciences organizations globally. More than 80% of Infosys' life sciences SCM clients are based in the US and Europe, with a growing footprint in Asia/Pacific and Latin America.

Core Value Proposition

Infosys offers a broad range of supply chain services to support life sciences clients in the planning, assessment, and implementation of various SCM tools across all major supply chain functions — from demand and supply planning to distribution logistics. Infosys' range of services includes strategy and transformation consulting, systems implementation, and limited business process outsourcing services. Infosys demonstrates deep technology expertise and strong supply chain services capabilities; it supports many vendors in the SCM space, including SAP, Oracle, Blue Yonder, IBM Sterling, Kinaxis, Manhattan, Microsoft, and others.

Infosys' extensive team of supply chain professionals, structured across consulting, implementation, and support, operates in a matrix model that integrates closely with its life sciences practice to drive transformation across diverse industry functions. Leveraging its global delivery capabilities and industry-specific solutions, Infosys helps its life sciences customers address evolving supply chain requirements for clinical trial supply chains, track and trace and serialization, cold chain management, and supply chain management of innovative precision therapies while ensuring regulatory compliance.

Infosys has supported large-scale, complex transformations for global life sciences clients, delivering major improvements in workforce productivity, operational efficiency, and cost savings. For example, Infosys supported a global SAP S/4HANA rollout for a major pharma customer in more than 100 locations globally. In another engagement, Infosys modernized and integrated the company's supplier and contract manufacturing ecosystem with SAP and other enterprise systems, enhancing visibility, automation, and compliance across the supply chain (including clinical trial supply chain processes). This enabled the customer and its partners to respond more effectively to supply chain disruptions during the COVID-19 pandemic. Infosys has also supported its life sciences clients in emerging areas such as cold chain management and logistics for CAR-T and radioligand therapies.

Infosys' consulting approach is grounded in its Digital Pentagon strategy, which emphasizes five pillars — experience, insight, acceleration, assurance, and innovation — to guide the digital transformation of supply chains. This strategic foundation is complemented by the company's use of advanced technologies such as AI/ML, IoT, and GenAI to enable intelligent supply chain capabilities. For example, Infosys has developed the GenAI Compliance Agent, AI-driven demand sensing, and an agentic architecture for message tracking and developer productivity. Its automation platform, LEAP, supports over 2,000 bots and facilitates AI/ML-driven decision-making across supply chain operations.

Building innovative technology capabilities is a key element of Infosys' supply chain services strategy, with a strong emphasis on AI-driven innovation. Its offering roadmap is aligned with emerging industry trends, particularly the growing complexities of decentralized clinical trials and the production and distribution of personalized medicines. To support this agenda, Infosys invests substantially in workforce development through Infosys Academy, providing continuous training and upskilling for its supply chain professionals. Furthermore, Infosys leverages a broad ecosystem of partnerships, a global network of digital innovation centers, and collaborations with academic institutions and tech start-ups to accelerate innovation and enhance its offerings in the life sciences supply chain services market.

Strengths

Infosys brings together deep supply chain services capabilities and technology expertise with global delivery strength and ecosystem partnerships to support life sciences organizations' supply chain transformation initiatives. Infosys has been recognized for:

- **Deep supply chain and IT services expertise:** With over 20,000 supply chain professionals, Infosys demonstrates robust technical expertise to support life sciences organizations in the planning, assessment, and implementation of various SCM solutions and tools. The company supports a broad range of supply chain platforms and is a validated RISE with SAP partner. With a strong AI-driven approach, Infosys is well equipped to support life sciences organizations' end-to-end supply chain transformation needs across all major supply chain functions.
- **Industry-specific platforms and accelerators:** Infosys has developed several tailored solutions for life sciences supply chains. Its CaPSule platform, built on SAP S/4HANA, includes over 70 pre-configured business processes aligned with subsegments such as pharmaceutical manufacturing, medical devices, CDMOs, and animal health. The company also offers AI- and IoT-enabled logistics platforms for cold-chain monitoring and complex logistics for personalized therapies, including CAR-T therapies.
- **Sustainability enablement focus:** Infosys adopts a comprehensive approach to sustainability, helping its life sciences customers integrate ESG goals into supply chain operations. This includes capabilities for tracking carbon emissions across transportation and warehousing, optimizing energy usage, and improving supply chain transparency. Infosys also leverages its strong internal sustainability practices to guide its life sciences customers' supply chain strategies.
- **Strong ecosystem and innovation strategy:** Infosys collaborates with a broad network of partners to drive innovation and enhance its SCM offerings. The company's innovation strategy also leverages close collaboration with academic institutions and tech start-ups. Infosys global network of innovation centers enables co-innovation initiatives and the co-creation of industry-

tailored solutions with clients and partners. Infosys also leverages Infosys Academy to support workforce development through structured training programs in specific domain topics.

Challenges

While Infosys offers strong technology and domain-expertise and global delivery capabilities, its presence in the life sciences supply chain services market remains limited. IDC believes Infosys would benefit from strengthening its customer engagement strategies and enhancing its marketing efforts to increase the visibility of its industry-specific capabilities. The company could further enhance its value proposition by strengthening its business advisory capabilities and adopting a more proactive approach to innovation enablement to help customers maximize the impact of their supply chain initiatives.

Consider Infosys When

Infosys is well positioned to support life sciences organizations seeking a reliable partner for global supply chain transformation initiatives. The company offers deep supply chain expertise, particularly for SAP environments, and is a strong choice for large life sciences companies seeking to integrate AI and automation technologies into their supply chain operations. Infosys is also highly suitable for life sciences organizations pursuing innovation to address the evolving supply chain challenges associated with decentralized clinical trials, cold chain management, and advanced therapies such as CAR-T and cell and gene therapies and radioligand treatments.

NTT DATA

After a thorough evaluation of its offerings and capabilities, IDC has positioned NTT DATA in the Leaders category in this 2025 IDC MarketScape for worldwide life sciences intelligent supply chain services.

NTT DATA, Inc. was founded in 1967 and is headquartered in Tokyo, Japan. It operates in more than 50 countries with a global workforce of approximately 150,000. NTT DATA has been serving the life sciences industry for over 25 years; it has a dedicated life sciences practice serving life sciences organizations globally. Its large pool of life sciences customers span various market subsegments in North America, Europe, Latin America, and the Asia/Pacific region.

Core Value Proposition

NTT DATA offers a broad range of business and IT consulting services to support intelligent supply chain transformation for life sciences organizations. Its services comprise strategy and transformation consulting, systems implementation, and selected business process outsourcing services. NTT DATA's services address the full scope of supply chain operations, from network design to distribution and fulfillment.

NTT DATA has established partnerships with several players in the SCM space, with dedicated practices for SAP and Oracle. Its SAP global practice comprises over 20,000 professionals. These services are supported by a broad range of proprietary tools and industry-specific accelerators (e.g., Life Sciences Accelerated for Pharma, Life Sciences Accelerated for MedTech, Internal Cold Chain Monitoring, and Data Fabric Accelerated for Life Sciences) to facilitate compliant deployments. On the Oracle side, NTT DATA offers a comprehensive range of services, featuring more than 3,500 experts and a large set of tools and cloud accelerators to speed deployments.

Through its integrated services delivery model, NTT DATA has delivered multiple engagements across all major SCM areas for life sciences customers worldwide, including inventory optimization, cold chain management, serialization and track and trace, warehouse and transportation management, and reverse logistics. By supporting areas such as data-driven planning, network optimization, inventory optimization, and warehouse automation, these engagements have resulted in significant improvements in working capital performance, service levels, and cost savings and operational efficiency. For example, NTT DATA supported a global medical device manufacturer in reducing working capital by 26% through improved forecasting and inventory optimization. In another engagement, NTT DATA helped a life sciences manufacturer streamline operations and optimize its global distribution network following acquisitions, with a projected annual reduction of 12% in operating expenses.

NTT DATA has demonstrated strong capabilities in delivering industry-tailored services in areas such as supply chain management for clinical trials and cell and gene therapies, while ensuring strong governance and regulatory compliance. By leveraging structured methodologies and dedicated in-house GxP and CSV validation experts, NTT DATA supports its customers in achieving compliance with regulatory requirements, including UDI, CSV, and GxP standards.

NTT DATA places strong emphasis on AI-driven supply chain innovation and offers robust data and AI capabilities for its life sciences clients. Its innovation delivery strategy focuses on modernizing data foundations to unlock the value of AI, advanced analytics, and automation technologies and operationalize intelligent capabilities. The company invests over $3.6 billion annually in R&D and innovation. With a strategic focus on AI-driven supply chain capabilities, NTT DATA's innovation initiatives comprise digital twins, GenAI-based contract generation and analysis, real-time visibility control towers, predictive analytics for supply chain optimization, GenAI for regulatory and operational needs, and agentic AI use cases.

NTT DATA further leverages ecosystem partnerships to enhance its supply chain offerings to deliver specialized offerings in support of serialization, cold chain monitoring, supply chain planning, and regulatory compliance. In addition to strategic partnerships with SAP and Oracle, NTT DATA's supply chain ecosystem partnerships include (but are not limited to) BlueYonder, Kinaxis, Microsoft, TraceLink, and o9. The acquisition of Chainalytics in 2021 significantly strengthened the company's supply chain services offerings and capabilities.

Strengths

NTT DATA integrates deep supply chain technology expertise and global experience with robust data-driven capabilities and industry-specific accelerators to deliver comprehensive supply chain transformation services. NTT DATA has been recognized for:

- **Deep supply chain technology expertise "accelerated for life sciences":** NTT DATA demonstrates deep supply chain technology expertise. Its end-to-end SAP and Oracle capabilities are supported by a large pool of certified experts, offering comprehensive services across these ecosystems. NTT DATA has developed a broad range of prebuilt tools and accelerators (including Life Sciences Accelerated for SAP S/4HANA) for industry-specific requirements. These capabilities allow NTT DATA to address evolving life sciences supply chain challenges associated with complex products such as plasma-derived products and CGTs.
- **Focus on data-driven supply chain transformation:** NTT DATA adopts a strong data-driven approach to supply chain transformation projects, emphasizing data modernization, strong data foundations, and digital core enablement for driving intelligent transformation. Additionally, by leveraging proprietary validation assets and scenario modeling, NTT DATA enables simulation-based planning before full-scale implementations to mitigate risks and foster measurable outcomes. The integration of Chainalytics' supply chain planning and analytics capabilities (acquired in 2021) further strengthens its supply chain services expertise.
- **Robust data and AI capabilities and innovation focus:** NTT DATA offers robust data and AI capabilities and effectively leverages ecosystem partnerships to enhance its innovation capabilities for life sciences supply chains. With investments in industry-specific AI models, a strategic focus on AI-driven supply chain capabilities, advanced analytics, and emerging technologies such as GenAI, agentic AI, and digital twins, NTT DATA is well positioned to support life sciences clients in intelligent supply chain transformation.
- **Global experience with customer-centric and outcome-focused delivery:** NTT DATA's global experience, integrated delivery capabilities, and right-shoring approach, which emphasizes the strategic allocation of talent and best practices, allows it to serve a broad spectrum of life sciences organizations across diverse regions and levels of digital maturity. Customers value NTT DATA for its customer-centric approach, marked by strong alignment with business objectives and a strong focus on cost efficiency and flexibility. This positions the company as a trusted partner for delivering measurable value in complex supply chain transformation initiatives.

Challenges

While NTT DATA demonstrates robust technology capabilities, IDC believes the company should enhance its marketing efforts. NTT DATA should focus on more targeted client messaging and thought leadership initiatives, and it should highlight its life sciences customer references more prominently to increase market awareness of its differentiated value proposition for life sciences supply chain transformation services. NTT DATA would also benefit from adopting a more proactive approach to change management to enhance customers' ability to embed and scale long-term value from their supply chain transformation initiatives.

Consider NTT DATA When

NTT DATA is a strong choice for life sciences organizations of various sizes and levels of digital maturity seeking a trusted, competitively priced partner for their supply chain transformation initiatives. It is particularly well suited to support comprehensive supply chain integration projects in SAP and Oracle environments with industry-tailored services. NTT DATA is also a compelling choice for companies embarking on compliance-driven supply chain transformation projects and those seeking to leverage AI-powered data-driven solutions to enable intelligent transformation and address inefficiencies across complex distribution networks.

PwC

After close evaluation of its offerings and capabilities, IDC has positioned PwC in the Leaders category in this 2025 IDC MarketScape for worldwide life sciences intelligent supply chain services.

PwC is a privately held company headquartered in London and New York. It was formed in 1998 from a merger between Price Waterhouse and Coopers & Lybrand. PwC operates in more than 150 countries and has a global workforce of over 370,000 employees. It employs approximately 17,000 people within its Global Health Industries division and has more than 25 years of experience in the life sciences industry. PwC's large customer base includes most of the prominent global life sciences companies in diverse market segments and regions, with a significant client base in North America and Europe.

IDC notes that this evaluation is based on publicly available information and its existing knowledge of the company.

Core Value Proposition

PwC offers a comprehensive portfolio of supply chain services tailored to the life sciences industry, supporting clients across the full supply chain transformation life cycle. Its range of supply chain services spans systems implementation and integration, strategic consulting, and selected BPO services.

With over 17,000 dedicated life sciences professionals and more than 5,000 supply chain specialists, PwC delivers a full range of strategy, business, and technology services to support complex supply chain transformation initiatives. It maintains strategic alliances with SCM technology vendors such as SAP, Oracle, Blue Yonder, Coupa, Kinaxis, Microsoft, IBM Sterling, Manhattan, and o9.

These capabilities enable PwC to address the diverse supply chain needs of its life sciences customers. Its services are delivered through an integrated model, supported by more than 150 delivery centers worldwide. PwC's multidisciplinary teams work closely with client stakeholders throughout projects to ensure close alignment with business objectives. The company's customer service delivery approach is underpinned by its proprietary BXT (Business, Experience, Technology) methodology, which supports strategic alignment, user-centric design, and technology execution. PwC also offers a broad set of prebuilt, industry-specific accelerators to drive speed and value in deployments. Its proprietary tools (e.g., the Data Quality & Governance Toolkit, S&OP Digital Playbook, and Control Tower Signal Analyzer) enhance planning, execution, and decision-making across the supply chain.

Its deep industry expertise, diverse talent pool, and technology capabilities enable PwC to provide services in all major SCM areas, from planning to fulfillment. PwC has demonstrated success in engagements with life sciences organizations to drive visibility, resilience, and compliance across global supply networks. This includes supporting industry-critical areas such as cold chain logistics, serialization, and unique device identification (UDI) compliance and delivering strategic advisory services in areas such as supply chain assessments, operating model design, and distribution strategy optimization.

Customers particularly value PwC's ability to help them navigate the complexities of global supply chains while maintaining regulatory compliance. This includes services that support drug serialization and UDI compliance. PwC is also working to expand its capabilities in sustainability planning and global trade compliance.

PwC is actively investing in innovative technologies such as AI, GenAI, and agentic AI, with a focus on enabling intelligent automation and orchestration across complex supply chain ecosystems. PwC supported a major global pharmaceutical customer in leveraging GenAI for automating process documentation as part of a broader supply chain transformation initiative. It is also developing use cases across various supply chain areas, including demand forecasting, procurement, inventory optimization, and regulatory compliance.

PwC's innovation roadmap stresses platform flexibility, AI enablement, and business value realization. In addition to the SCM vendors listed above, its robust partner ecosystem includes niche technology providers and specialized industry players. This partner ecosystem further supports co-innovation and enhances PwC's ability to deliver integrated, end-to-end supply chain services.

Strengths

PwC brings together a diverse talent pool, broad range of expertise, deep industry knowledge and strong technology capabilities to support life sciences organizations' supply chain transformation initiatives. PwC has been recognized for:

- **Diverse industry-tailored and client-ready capabilities:** PwC's expertise extends to multiple industry segments and functional areas. The company delivers a broad set of capabilities across various functional, operational, and technology domains, enabling intelligent end-to-end transformation of clinical and commercial supply chains. PwC also leverages a wide range of prebuilt, industry-specific tools and accelerators that enable the rapid deployment of supply chain solutions, accelerating time to value, enhancing efficiency and resilience, and mitigating risks.
- **Outcome-driven approach for sustainable impact:** In its engagements with life sciences organizations, PwC employs an outcome-driven model that emphasizes long-term value creation through structured transformation. Its multidisciplinary teams — spanning industry, functional, and technology domains — work closely with customer stakeholders from strategy through execution. PwC leverages robust methodologies for change management and user feedback integration to ensure strong alignment with business objectives and sustainable impact. This approach also contributes to customer satisfaction and long-term retention.
- **Global scale with local expertise:** PwC's extensive global footprint enables it to support large-scale supply chain transformation initiatives across multiple geographies. With delivery capabilities in nearly 150 countries, PwC offers global reach with local expertise to address the supply chain needs of life sciences clients in diverse geographies, market segments, and organizational scales.
- **Data-driven transformation with regulatory rigor:** PwC combines advanced analytics and data-driven capabilities with deep regulatory expertise to support life sciences organizations in embedding intelligence into their supply chain operations while maintaining strict compliance. Customers value PwC's ability to support adherence to industry standards and regulatory requirements. PwC also places a strong emphasis on safeguarding security in customer service delivery throughout the project life cycle, with its teams trained in robust data protection protocols.

Challenges

While PwC excels in customer-centric delivery and broad industry and cross-functional expertise, cost considerations may pose potential barriers for some life sciences customers, especially organizations prioritizing short-term value. IDC believes more flexible pricing models could help PwC better address the needs of life sciences organizations with constrained budgets or those focused on narrowly scoped systems integration projects rather than full-scale transformation initiatives.

Consider PwC When

Life sciences organizations should consider PwC as a trusted partner for modernizing and transforming global supply chain operations. With its broad global footprint, strong industry experience, multidisciplinary capabilities, and deep regulatory expertise, PwC is an ideal fit for life sciences organizations requiring broad, cross-functional expertise to support complex, multinational projects spanning diverse jurisdictions and regulatory environments. It is a particularly strong choice for organizations undertaking compliance-driven supply chain initiatives (including compliance with serialization and UDI requirements) and for organizations focused on long-term value creation through end-to-end supply chain transformation.

TCS

After a thorough evaluation of its offerings and capabilities, IDC has positioned TCS in the Leaders category in this 2025 IDC MarketScape for worldwide life sciences intelligent supply chain services.

Tata Consultancy Services (TCS) was founded in 1968 and is headquartered in Mumbai, India. It operates in over 55 countries with a global workforce of over 600,000 employees, including more than 60,000 experts dedicated to healthcare and life sciences. TCS has over 30 years of experience in delivering supply chain services to life sciences customers. Its customer base includes many prominent global life sciences organizations. The majority of the company's life sciences customers are based in North America and Europe, and it is expanding its presence in Asia/Pacific and Latin America.

Core Value Proposition

TCS offers a comprehensive portfolio of intelligent supply chain services tailored to life sciences organizations. Its range of services includes strategy and transformation consulting, systems implementation and integration, and select BPO services, which support pharmaceutical, biotech, and medical device organizations in the planning, assessment, and implementation of SCM tools and initiatives.

The company's supply chain offerings and services span all major SCM functions, from planning to distribution and reverse logistics. The company has established partnerships with multiple vendors in the SCM space, including (but not limited to) SAP, Oracle, Blue Yonder, Kinaxis, O9, OMP, Microsoft, TraceLink, Anaplan, Coupa, and Manhattan.

TCS's offerings are strengthened by deep regulatory and cybersecurity expertise, as well as strong engineering capabilities, enabling the company to effectively support compliance-intensive supply chain transformation initiatives for its life sciences customers. TCS has supported customers in serialization and cold chain management for temperature- and time-sensitive products, and in highly specialized areas such as connected supply chain orchestration for cell and gene therapies (including support in donor management, order tracking, and last-mile delivery).

TCS invests significantly in talent development through structured programs such as the Supply Chain Gurukul (a program to train entry-level talent) and Contextual Masters (certification for its experienced associates), aimed at building deep functional and industry expertise among its consultants.

To further support its engagements, TCS has developed a set of proprietary tools and accelerators. These include TCS Crystallus for Life Sciences on SAP and Oracle, a set of preconfigured solutions for enabling enterprise-wide transformation services and industry solutions; Dynachain (for multi-enterprise orchestration); TwinX (a digital twin platform); and Ignio (for AI-driven procurement). By leveraging these tools, TCS has delivered multiple global supply chain transformation programs with accelerated rollouts. For example, it led a large-scale post-merger supply chain integration project for a major global pharmaceutical customer, yielding sizable cost savings and improved service levels.

TCS strongly emphasizes the integration of advanced technologies into supply chain operations, underscoring the transformative potential of generative AI through an "AI-first, cloud-based" approach. Its WisdomNext platform integrates GenAI and cloud services into a unified interface, offering industry-specific blueprints to accelerate AI adoption across various sectors, including life sciences. These capabilities have enabled TCS to support a broad range of life sciences organizations in the successful implementation of GenAI and digital twin technologies for supply chain planning, procurement, and logistics functions.

TCS's R&D and innovation strategy provides a strong foundation for continued growth, enabling the company to stay agile and responsive to emerging market trends and evolving customer needs. It has invested in over 40 innovation centers and is actively exploring emerging technologies, including AI, GenAI, digital twin, quantum computing, blockchain, and robotics. TCS also collaborates with companies such as NVIDIA and Oracle on co-developing GenAI solutions. It is also actively investing in AI talent development and has trained more than 550,000 employees in GenAI.

TCS further leverages an extensive ecosystem of strategic partnerships with major global vendors and niche players to strengthen its supply chain services capabilities and drive innovation in the space. TCS also maintains a Co-Innovation Network (COIN) that includes partnerships with various prominent academic institutions (e.g., MIT, CMU, and Cornell Tech), industry organizations, and innovative tech startups.

Strengths

TCS brings together broad industry and supply chain expertise, advanced technologies, and strong co-innovation capabilities to provide end-to-end support to life sciences customers in their supply chain transformation initiatives. TCS has been recognized for:

- **End-to-end supply chain transformation capabilities:** TCS offers deep experience in delivering a full spectrum of supply chain services across all major SCM functions and platforms. Its ability to support multi-vendor environments and manage complex global rollouts positions it as a trusted partner for large-scale transformation initiatives. This is further enhanced by its proprietary platforms and accelerators, enabling expedited time to value and regulatory compliance.
- **Comprehensive industry expertise:** TCS demonstrates extensive life sciences experience and expertise. With a pool of more than 60,000 healthcare and life sciences experts, combined with supply chain technology and regulatory expertise, TCS is fully equipped to address the complex supply chain needs of life sciences organizations of various sizes and profiles across multiple sites and geographies.
- **Customer-centricity and value realization focus:** Customers recognize TCS for its customer-centric service delivery approach, its commitment to creating value, its flexible engagement models, and its deep contextual understanding of the specific needs and challenges of the life sciences industry. TCS's business alignment focus, flexibility to adapt to scope changes, technology capabilities, and proactive approach to innovation delivery enable it to "scale with customers" and maximize the impact of supply chain transformation efforts.
- **Robust innovation strategy:** TCS R&D and co-innovation initiatives provide a strong foundation for sustained growth. The company has established a broad ecosystem for innovation, collaborating with clients, academia, research institutions, industry organizations, technology providers, and start-ups to drive innovation. TCS further fosters innovation through its TCS COIN initiative to develop innovative solutions, including AI-based tools and offerings. It also leverages digital transformation hubs (e.g., TCS Pace Port) to co-create and accelerate innovation with customers.

Challenges

While TCS demonstrates deep industry expertise and strong capabilities in supply chain services, IDC believes it could further enhance its value proposition by expanding its business process consulting and change management advisory capabilities. Additionally, the company could benefit from strengthening its marketing strategy with more refined messaging that clearly articulates its differentiated capabilities in life sciences supply chain transformation.

Consider TCS When

Life sciences organizations should consider TCS when undertaking large-scale supply chain modernization and transformation initiatives. TCS's deep industry experience, implementation expertise, and proprietary accelerators make it particularly suitable for supply chain integration initiatives involving complex, multi-vendor SCM

environments, including integration following mergers or acquisitions. TCS is also a strong choice for organizations aiming to integrate GenAI, digital twins, and AI-driven planning and procurement into their supply chain processes, particularly in regulatory-intensive scenarios and when addressing the supply chain complexities of advanced personalized therapies.

Tech Mahindra

After a thorough evaluation of its offerings and capabilities, IDC has positioned Tech Mahindra in the Major Players category in this 2025 IDC MarketScape for worldwide life sciences intelligent supply chain services.

Tech Mahindra was founded in 1986 and is headquartered in Pune, India. It operates in over 90 countries, with a global workforce of approximately 150,000 employees. Tech Mahindra has been serving the life sciences industry for more than 20 years and has approximately 6,500 dedicated employees with life sciences industry expertise. It serves life sciences clients globally, with a relatively small number of engagements focused on supply chain transformation services. The majority of its life sciences customers are based in North America and Europe.

IDC notes that this evaluation is based on publicly available information and its existing knowledge of the company.

Core Value Proposition

Tech Mahindra has strong experience in supply chain transformation services. The company offers a full set of services spanning implementation and integration, business process outsourcing, and strategy and transformation consulting.

Tech Mahindra has deep experience in delivering supply chain services for the Oracle ecosystem. Its Oracle Practice features more than 10,000 experts with deep technology expertise. It also offers a set of proprietary accelerators and preconfigured solutions (e.g., for fleet management) designed to accelerate time to value, with a strong focus on end-to-end process transformation. Other vendors in the SCM space the company partners with include SAP, BlueYonder, Dassault Systemes, Infor, Kinaxis, and Microsoft.

Tech Mahindra leverages its SCM engine and proprietary solutions to deliver end-to-end SCM services, providing a 360-degree view and supporting continuous improvement across the supply chain life cycle. Backed by a strong pool of life sciences domain experts, it has supported life sciences customers in areas such as sourcing, planning, procurement, order management, transportation management, packaging and labeling, and aftermarket functions.

Tech Mahindra's supply chain transformation approach centers on building agile, resilient, data-intelligent, and purpose-driven "Conscious Enterprises" through its Cognitive Supply Chain framework, which leverages advanced technologies to enable real-time orchestration, predictive insights, and autonomous operations.

The company adopts a customer-centric delivery approach, employing flexible engagement models, a design-led methodology, and a digital-first strategy that prioritizes end-user experiences, operational excellence, and enterprise-wide transformation. This is complemented by a strong focus on value realization, change management, and program management to maximize business alignment and tangible outcomes.

Tech Mahindra's design-led consulting framework makes intelligence and sustainability integral to transformation initiatives. Sustainability is central to Tech Mahindra's supply chain services roadmap, reflected in initiatives such as its Scope 3 emissions monitoring and a broader ESG framework to help customers align with their sustainability goals.

Tech Mahindra makes substantial efforts to integrate advanced technologies into its supply chain offerings and services, including AI, GenAI, digital twins, IoT, and blockchain. These efforts are aimed at aligning with growing industry requirements for AI-driven insights, workflow automation, intelligent decision-making, and regulatory compliance. For example, Tech Mahindra's control tower services leverage agentic AI to enable integrated planning and decision-making, while its warehouse, transportation, and order management services incorporate GenAI and automation technologies to enhance supply chain reliability, operational efficiency, and customer satisfaction.

Tech Mahindra is also working with life sciences customers on the development of advanced supply chain solutions through Perigord, a company it acquired in 2021. This includes the Global Artwork Management System (GLAMS) and Connected Packaging solution that integrates AI, IoT, and connectivity into product packaging and labeling to meet evolving traceability, compliance, and patient and customer requirements.

The company's innovation strategy is supported by its strong ecosystem partnerships and its deep collaboration with Mahindra University (in Hyderabad, India) on research in AI, digital twins, and quantum computing. The company also leverages its collaboration with Mahindra University to develop talent in specialized domain areas, ensuring a pipeline of future-ready professionals. Additionally, Tech Mahindra leverages partnerships with major technology vendors and global platform providers such as Google Cloud, Microsoft, and AWS to accelerate innovation and develop its supply chain offerings and capabilities.

Strengths

Tech Mahindra offers strong supply chain services experience, industry expertise, and ecosystem innovation capabilities to support intelligent supply chain transformation for life sciences. Tech Mahindra has been recognized for:

- **Deep supply chain services experience:** Tech Mahindra's strong supply chain services capabilities, particularly within the Oracle ecosystem, are backed by over two decades of implementation experience. Its design-led consulting framework and engineering expertise supports the integration of intelligence and sustainability into supply chain processes. The company applies structured methodologies and domain-specific accelerators (e.g., Tarriff Impact Analyzer, Supplier Risk Assessment, and Supply Chain Simulation models) to facilitate deployments.
- **Strong industry expertise:** Tech Mahindra has a dedicated healthcare and life sciences vertical that serves clients across various life sciences subsegments, with a primary focus on large organizations. The company's team includes domain experts with industry and technology backgrounds, supporting the full life sciences value chain from R&D to commercialization. Tech Mahindra has demonstrated capabilities in packaging, labeling, and artwork management, strengthened by the acquisition of Perigord, and in supporting regulatory-driven initiatives.
- **Strategies for driving innovation and sustainability:** Tech Mahindra's innovation approach is grounded in strategic partnerships and a strong connection to the Mahindra Group's engineering heritage. The company collaborates with Mahindra University on research in AI, digital twins, and quantum computing, as well as talent development. Tech Mahindra's initiatives (e.g., Scope 3 emissions monitoring and a broader ESG framework) support customers in meeting their sustainability goals.
- **Value-centric approach:** Tech Mahindra emphasizes value-centricity in its consulting approach and customer service delivery. The company's design-led approach and digital-first strategy focuses on integrated transformation for better customer and patient experience. Its "value-centric" consulting approach focuses strongly on change management and continuous improvement throughout the engagement life cycle to facilitate value realization, deliver measurable outcomes, and accelerate time-to-value.

Challenges

While Tech Mahindra demonstrates a strong set of capabilities and expertise across the consulting, technology, and industry domains, its presence on the life sciences supply chain transformation services market is still limited. IDC believes the company would benefit from expanding and optimizing its customer engagement strategies to better address the needs of a broader range of life sciences organizations in diverse subsegments. Tech Mahindra should also strengthen its market messaging to more clearly highlight its specific value proposition in life sciences intelligent supply chain services.

Consider Tech Mahindra When

Life sciences organizations should consider Tech Mahindra when looking for a partner with a solid balance of industry and technology expertise backed by strong engineering capabilities to support their supply chain transformation initiatives end to end, especially within Oracle and SAP environments. Tech Mahindra demonstrates a consistent focus on value realization and measurable business outcomes. It is particularly suitable for life sciences organizations prioritizing the integration of innovative technologies, such as AI, IoT, and digital twins, into their supply chain operations for sustainability-driven projects.

ZS Associates

After a thorough evaluation of its offerings and capabilities, IDC has positioned ZS Associates (ZS) in the Major Players category in this 2025 IDC MarketScape for worldwide life sciences intelligent supply chain services.

Founded in 1983 and headquartered in Evanston, Illinois, ZS employs over 13,000 people across 38 delivery centers and serves clients in over 70 countries. It has approximately 10,000 life sciences-focused professionals and has been serving the life sciences industry for over 40 years. At present, approximately two-thirds of ZS's supply chain services engagements with life sciences organizations are based in the US and the remaining third in Europe, with a growing footprint among Europe-headquartered organizations.

Core Value Proposition

ZS has a strong focus on providing business and IT services in life sciences sectors. The company has been delivering supply chain services tailored to the life sciences industry for over 12 years. Its range of supply chain services for life sciences organizations includes strategy and transformation consulting, systems implementation and integration, and business process outsourcing.

ZS partners with a broad range of vendor ecosystems in the SCM space, including SAP, Oracle, Kinaxis, Microsoft, and Anaplan. ZS supports life sciences companies across all major SCM functions, most extensively with supply chain planning, procurement, transportation management, and supply chain orchestration. For example, ZS helped a major global pharma company leverage AI and advanced analytics to improve forecast accuracy by more than 20% for medicinal product stockouts and mitigate stock-out risks across its global supply chain network.

ZS emphasizes an integrated approach to business transformation across the enterprise. It leverages deep life sciences expertise, flexible customer engagement models, and diverse cross-functional teams (e.g., supply chain, commercial, and regulatory teams) to support life sciences organizations from strategy to execution across multiple functional areas. The company has demonstrated success in providing supply chain services to life sciences customers in highly specialized areas,

including cold chain management, clinical supply chain control tower orchestration, drug serialization, and vaccine and CGT supply chains logistics. For example, ZS supported a company specializing in cell and gene therapies in developing a control tower for logistics and distribution management.

ZS has strong data science and AI capabilities and experience, enabling AI-driven supply chain transformation for a broad range of use cases across the entire life sciences value chain. This allows ZS to address emerging industry trends that entail supply chain complexities for innovative therapies and personalized medicines. For example, ZS helped a major global pharma company use GenAI for document automation and decision support for freight audit and route optimization solutions.

ZS emphasizes developing internal AI capabilities and has a structured innovation pipeline to invest in emerging technologies such as AI, GenAI, IoT, and digital twins. It has also developed proprietary platforms that leverage AI/ML, GenAI, and agentic AI to support intelligent, data-driven decision-making, including Canary Decision Studio (a real-time risk sensing and decision support platform for supply chain operations), Manufacturing Decision Studio (a platform for optimizing manufacturing performance and scheduling through predictive analytics), and Max.AI (an agentic AI and GenAI-powered platform for automating supply chain decision-making).

ZS's partnerships further enhance its service offerings and innovation through collaboration with both global technology providers and specialized, niche life sciences players. The company also participates in industry alliances such as the Pistoia Alliance, where it contributes to the development of CMC ontologies and data standards, reinforcing its commitment to driving supply chain transformation.

Strengths

ZS Associates combines robust industry expertise with strong data science and AI capabilities to deliver specialized supply chain services tailored to the needs of the life sciences industry. ZS has been recognized for:

- **Strong mix of capabilities to address life sciences supply chain complexities:** Deep industry expertise and extensive regulatory experience allow ZS to offer specialized services tailored to the complexities of life sciences supply chains, supporting companies in effectively navigating highly regulated, patient-centric environments. The company supports a broad range of complex supply chain scenarios across clinical and commercial supply chains, including logistics orchestration for CGTs, vaccines, and other biologics.
- **Strong data science and AI capabilities:** ZS is recognized for its strong data science and AI/ML capabilities. This enables customers to leverage data from internal and external sources and apply advanced analytics and predictive modeling to embed intelligence across supply chain operations. Customers

value the improvements ZS has delivered in areas such as forecast accuracy, inventory optimization, and risk mitigation, enabled by its AI-driven approach.

- **AI-enabled assets for intelligent supply chain transformation:** ZS offers a suite of proprietary assets (e.g., Canary Decision Studio, Manufacturing Decision Studio, and Max.AI) to support the rapid deployment of AI/ML, generative AI, and AI agents for specific business needs. ZS leverages these solutions to support its customers in various SCM areas (e.g., demand forecasting, stockout prediction, supply chain orchestration, document automation, and decision-making), helping them accelerate the transition toward a more intelligent and automated supply chain.
- **Customer-centricity and value-oriented approach:** ZS is valued by its life sciences customers for its modular service delivery model and value-driven approach that focuses on cost reduction, operational efficiency, and measurable outcomes. This customer-centric mindset is also reflected in ZS's flexible engagement models, which include a range of value-based and risk-sharing arrangements that contribute to customer success and long-term retention.

Challenges

While ZS demonstrates strong capabilities in enabling intelligent supply chain transformation for life sciences organizations, IDC believes the company has an opportunity to further expand its global footprint in the life sciences supply chain services market by tailoring its service offerings to the more nuanced needs of mid-tier and emerging life sciences organizations. The company should also refine its market messaging to align more closely with this customer segment. ZS could also strengthen its positioning by deepening its partnerships with SCM solution vendors, enhancing its BPO capabilities, and adopting a more structured approach to organizational change management.

Consider ZS Associates When

Life sciences organizations should consider ZS Associates when seeking a competitively priced partner with deep domain expertise and flexible engagement models to support their intelligent transformation initiatives across clinical and commercial supply chains. ZS's innovative technology capabilities, strong experience in regulated environments, and ability to deliver measurable outcomes make it a compelling choice, particularly for large life sciences manufacturers and distributors who seek to leverage innovative technologies such as AI and digital twins to support supply chain management for complex product portfolios (including biologics and personalized medicines).

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 represent 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 capability.

Market Definition

Intelligent Supply Chain Services

For the purposes of this study, **intelligent supply chain services** are defined as a combination of business and IT services that assist life sciences organizations in the planning, assessment and implementation of various supply chain management (SCM) tools and solutions to enable them to make intelligent supply chain decisions, plan and implement supply chain solutions, improve supply chain processes and transform operations, and maximize the business value of their SCM technology

investments. As defined in this study, intelligent supply chain services include strategy and transformation consulting, systems implementation and integration, and business process outsourcing (BPO) services.

- **Strategy and transformation consulting:** For the purposes of this study, strategy and transformation consulting refers to business consulting services that involve strategic consulting, operational improvement, and organizational change consulting services rendered to life sciences organizations to help them define the strategy and design and implement the structures and processes to reach their SCM goals.
- **Systems implementation and integration:** In the context of this study, systems implementation and integration is defined as a process that includes the planning, design, implementation, and project management of technical solution(s) that address life sciences organizations' supply chain needs. These projects may involve the implementation and integration of different supply chain applications from a broad range of vendors. When these projects involve contracting for custom application development related to systems implementation and integration, these activities are also included in the scope of this assessment. This may include, for example, the development of adjacent tools and task apps to augment the capabilities of the SCM suite.
- **Business process outsourcing (BPO):** IDC defines business process outsourcing as the transfer of the management and execution of one or more complete business activities, business processes, 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 entire SCM functions or discrete segments therein.

These services are delivered to life sciences organizations to support a broad range of SCM areas, including (but not limited to) demand planning, supply planning, track and trace and serialization, cold chain monitoring and management, inventory management and optimization, control tower/supply chain orchestration, warehouse management, order management, transportation management, and global trade management.

Strategies and Capabilities Criteria

Table 1 and Table 2 show key strategy and capability measures, respectively, for the success of life sciences intelligent supply chain services vendors.

TABLE 1

Key Strategy Measures for Success: Worldwide Life Sciences Intelligent Supply Chain Services

Criteria Categories	Definition	Weight (%)
Functionality or offering strategy	The vendor has a robust strategy in place to expand its service offerings for life sciences SCM. The company's future plans for the development of its service offerings are well-aligned with the industry's evolving requirements, anticipated market trends, and the needs of priority customer segments.	20
Delivery	The vendor has formulated a strategy to ensure its service delivery resources (delivery model, methodologies, and expertise) match the changing dynamics of the life sciences market across different geographies and customer segments.	20
Innovation	The vendor demonstrates strong commitment and invests a dedicated share of its global revenues in development and innovation; it has structured processes in place to align its innovation strategy with future supply chain needs and evolving trends in the life sciences industry.	20
Marketing strategy	The vendor demonstrates an effective marketing strategy and thought leadership in the life sciences SCM space, leveraging a diverse array of channels and resources to expand its reach and enhance engagement with life sciences customers.	20
Growth	The vendor pursues strong strategies for industry focus expansion, customer base growth, and geographic expansion. The vendor demonstrates effective growth in terms of its global life sciences supply chain services business and expects to further strengthen and expand its life sciences customer base in this area.	20
Total		100

Source: IDC, 2025

TABLE 2

Key Capability Measures for Success: Worldwide Life Sciences Intelligent Supply Chain Services

Criteria Categories	Definition	Weight (%)
Functionality or offering	The vendor's IT and business services capabilities and offerings are well-aligned with the supply chain needs of life sciences companies, including systems implementation and integration, business process outsourcing (BPO), and strategy and transformation consulting services.	14
Range of services	The vendor offers a comprehensive range of supply chain services across different supply chain management (SCM) areas, with a special focus on industry-critical supply chain domains (e.g., cold chain management, track and trace, and serialization).	14
Industry focus	The vendor demonstrates strong industry expertise and engagement experience across various supply chain functional areas within the life sciences industry. The company has dedicated manpower and a strong base of life sciences customers. The size and variety of the customer base are also considered.	16
Customer service delivery	The vendor provides adequate resources to meet the SCM service needs of life sciences customers across diverse global regions. This includes the availability of dedicated delivery centers globally, industry manpower, and project management and governance capabilities, as well as the availability of a diverse range of methodologies and frameworks supporting the delivery of supply chain services.	14
Customer satisfaction	The vendor demonstrates high customer satisfaction levels and retention rates. It has established structured processes for ensuring continuous improvements in customer satisfaction and experience (assessed via customer reference interviews).	14
Portfolio benefits	The vendor demonstrates strategic partnerships with major supply chain technology providers and other ecosystem players, enabling it to better meet their life sciences customers' supply chain transformation needs. The vendor's recent acquisitions enhance its ability to address life sciences customers' supply chain needs.	14
Innovation capabilities	The vendor demonstrates the ability to support its life sciences customers in the use of new and emerging technologies (such as AI, GenAI, AI agents, IoT, and digital twins) to enable intelligent supply chain transformation.	14
Total		100

Source: IDC, 2025

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Related Research

- *2025 Supply Chain Survey Life Sciences Industry Findings and Implications* (IDC #US53662025, July 2025)
- *The Technology Impact of the New Trump Administration, 2025: Life Sciences, Medtech Companies, Healthcare Providers, and Healthcare Payers* (IDC #US53552525, June 2025)
- *Batch Release Digitalization in Life Sciences: Enhancing Quality, Productivity, and Compliance* (IDC #US53041225, May 2025)
- *Generative AI Use Case Taxonomy, 2025: The Life Sciences Industry* (IDC #US52220325, May 2025)
- *IDC MaturityScape Benchmark: AI-Fueled Life Sciences Organizations Worldwide, 2025* (IDC #US53345625, May 2025)
- *Worldwide GenAI Industry Use Case Early Adoption Trends, 2025: Life Sciences* (IDC #US53317424, April 2025)

Synopsis

This IDC MarketScape evaluates vendors of worldwide life sciences intelligent supply chain services. These vendors offer life sciences organizations a combination of business and IT services to support them in the planning, assessment, and implementation of various supply chain management tools and solutions to drive intelligent supply chain transformation. This assessment is based on essential criteria life sciences organizations must consider when selecting service partners for this transformation journey to maximize the business value of their supply chain technology investments.

"The evolving life sciences landscape demands new levels of supply chain agility and resilience while ensuring regulatory compliance and enhancing customer and patient experiences. To future-proof themselves, life sciences organizations must achieve intelligent, resilient, and patient-centric supply chain operations across increasingly complex global supply chain networks. Selecting suitable service partners can help them bridge critical gaps in technology, skills, and capabilities on this transformation journey toward future-ready intelligent supply chains." — Research Manager Nino Giguashvili, IDC Health Insights Worldwide 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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