ISG Provider Lens®

Specialty Analytics and AI Services — Life Sciences



Specialty Analytics and AI Services — Life Sciences

A research report comparing providers' competitive differentiators for decision-makers

Customized report courtesy of:

Tiger Analytics

QUADRANT REPORT | OCTOBER 2026 | GLOBAL

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Report Authors: Manav Deep Sachdeva & Saravanan M S

Life sciences AI is advancing from isolated use cases toward trusted, connected decision systems

This ISG Provider Lens® study assesses service providers delivering specialty analytics and AI services across the life sciences value chain. The evaluation spans R&D, clinical development, real-world evidence, regulatory, safety, quality, manufacturing, supply chain, commercial and patient-facing functions. It examines how providers combine domain expertise, data foundations, advanced analytics, AI engineering, responsible AI and operating model capabilities to transform data into actionable insights and deliver scalable, compliant and measurable outcomes.

Market context

Life sciences organizations face simultaneous pressures to improve innovation productivity, protect margins and strengthen operational resilience. Patent expirations, rising development costs, clinical attrition, pricing and reimbursement constraints, geopolitical instability and fragile supply networks are increasing the cost of slow or poorly informed decisions.

Scientific complexity is also growing as organizations work with genomic, multi-omics, imaging, real-world, clinical, safety and connected-device data. As a result, the information environment has become larger and more heterogeneous, requiring stronger governance, context and evidence generation.

Advances in AI and data technologies are accelerating this shift. GenAI is moving beyond search and summarization toward multi-modal intelligence, workflow orchestration and specialized agents. Emerging systems can coordinate data retrieval, reasoning, document generation, validation and downstream action across

Reusable, governed AI assets are emerging as the key to **scaling** life sciences **transformation.**

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clinical, medical, regulatory and commercial processes. However, legacy platforms, undocumented dependencies, fragmented data and inconsistent semantics continue to limit scale. Rather than resolving these challenges, AI can amplify them when organizations deploy it on weak foundations instead of modernizing data, knowledge and operating architectures.

Regulation is reinforcing the need for trusted implementation. Good Practice regulations across manufacturing, clinical and laboratory, GDPR, evolving clinical quality standards and emerging AI rules require traceability, reproducibility, privacy protection and accountable human oversight. Requirements vary by jurisdiction, while health data access and residency rules continue to influence architecture decisions. North America remains the largest and most mature market for many specialist providers. Europe is shaping more stringent governance and transparency practices, while APAC continues to expand through regional research ecosystems, cloud adoption and localized delivery models.

Across regions, organizations are moving beyond departmental analytics and isolated PoCs toward connected, AI-enabled decision systems. The central challenge is no longer whether an AI model can produce an answer, but whether that answer is sufficiently contextual, explainable, validated and integrated to support a regulated business process. Scientific validity, evidence provenance and operational reliability are becoming just as important as model performance.

Enterprise priorities: Life sciences enterprises are responding with more selective investment, stronger governance and greater emphasis on adoption. ISG observes that five priorities are shaping buying behavior:

- **Build trusted data and knowledge foundations:** Enterprises seek unified access to structured and unstructured data from research, clinical, EHR, claims, safety, regulatory, manufacturing and commercial sources. They increasingly expect ontology alignment, metadata, lineage, semantic layers, knowledge graphs and reusable data products, not just cloud migration or dashboard consolidation. These foundations must support both analytics and context-rich AI while preserving privacy, quality and access controls.
- **Compress R&D and clinical timelines:** Buyers are prioritizing target and biomarker identification, molecular design, protocol digitization, patient stratification, site selection, recruitment, trial monitoring and clinical document generation. Demand is strongest for solutions embedded in scientific workflows with transparent evidence and expert validation. Enterprises increasingly favor reusable approaches that span therapeutic areas without rebuilding the entire pipeline.
- **Industrialize safety, regulatory and quality workflows:** Pharmacovigilance, labeling, medical writing, submission preparation, post-market surveillance and quality reviews contain high volumes of controlled content and manual checks. Organizations are seeking AI-assisted intake, extraction, triage, narrative generation, anonymization and compliance assessment. However, auditability, source attribution, confidence scoring, version control and human approval remain mandatory selection criteria.
- **Turn insights into decisions and action:** Commercial, medical affairs and patient services teams want unified intelligence for healthcare professionals (HCP) prioritization, key opinion leader (KOL) engagement, patient journeys, launch planning, forecasting, market access and omnichannel orchestration. Conversational analytics and next-best-action tools are beginning to replace static reporting, but enterprises require explainable recommendations, feedback loops and integration with workflow systems before scaling adoption.
- **Prove value while controlling AI risk:** Buyers are increasingly distinguishing demonstrations from production deployments and challenging the benefits derived from small samples. They expect baselines for cycle time, accuracy, adoption, cost and revenue impact, together with ongoing monitoring through MLOps or LLMOps.

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They also expect governance to address model drift, inappropriate outputs, privacy risks and the escalation of ambiguous results to qualified experts.

Sourcing models are broadening toward managed, transaction-based and outcome-linked structures when accountability can be clearly defined. Life sciences organizations are also evaluating whether providers can redesign workflows and roles, train users and sustain hybrid human-AI operations after deployment.

Provider dynamics: Providers are evolving beyond project-based analytics toward domain-led, platform-enabled and outcome-oriented delivery models. Leading providers increasingly connect consulting, data engineering, AI development, workflow redesign, deployment, adoption and managed operations rather than focusing solely on model development.

- **Domain expertise is moving into the core delivery model:** Providers are embedding scientists, clinicians, safety specialists, regulatory professionals and commercial experts alongside data engineers and AI teams. This improves problem framing, ontology design, validation and user adoption. It also enables persistent cross-functional teams that can refine solutions after deployment. Providers with broad technical skills but limited functional depth remain more dependent on client SMEs and are less differentiated in high-risk workflows.
- **Reusable platforms and accelerators are becoming the main route to scale:** The market is increasingly including assets for scientific literature intelligence, multi-modal knowledge discovery, patient cohort creation, clinical document generation, adverse event triage, regulatory intelligence, data harmonization, marketing mix, next-best action and supply chain planning. Open IP, configurable and technology-agnostic approaches appeal to enterprises seeking control and lower lock-in. However, asset catalog size alone is a weak indicator. Production maturity, integration effort, validation evidence and reuse across functions ultimately determine practical value.
- **Agentic AI is emerging, but controlled orchestration is more credible than autonomy claims:** Providers are developing agent studios, reusable agent libraries and orchestration layers that connect enterprise data, models, tools and workflows. More mature designs include role-based access, session lineage, observability, evaluation, fallback mechanisms and human-in-the-loop controls. Near-term adoption is strongest in bounded tasks such as evidence retrieval, cohort construction, document analysis, data quality remediation and recommendation support. Scientific, clinical and safety decisions will continue to require accountable expert review.
- **Operating models are changing to improve adoption:** Forward-deployed engineering pods, expert-in-the-loop operations and run-and-transform models place multi-disciplinary teams closer to business users. These models reduce handoffs between discovery, engineering and operations, support frequent releases, and make adoption and value tracking part of delivery. Providers are also offering flexible combinations of consulting, augmentation, product engineering, managed services and end-to-end workflow ownership.
- **Responsible AI and lifecycle engineering are becoming differentiators:** Providers are strengthening retrieval-augmented generation (RAG) architectures, source citations, privacy detection, anonymization, explainability, model evaluation, DevSecOps, MLOps and LLMOps. Leading implementations treat governance as an architectural control rather than a documentation activity. Cloud and data alliances accelerate industrialization, but domain knowledge, validation frameworks and interoperability continue to provide lasting differentiation.
- **Value measurement is moving beyond technical metrics:** More mature providers are tracking decision adoption, cycle-time reductions, productivity, revenue, risk reduction and production utilization rather than reporting model accuracy alone. This strengthens executive relevance and supports outcome-linked commercial

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models. Providers that cannot connect technical performance to workflow adoption and business impact will find it increasingly difficult to defend differentiated positioning.

- **Capability and geographic depth remain uneven:** Some specialists lead in scientific content, real-world evidence (RWE), regulatory and safety intelligence, while others demonstrate greater depth in commercial analytics, enterprise data platforms, agentic engineering or supply chain decision support. Manufacturing analytics, predictive maintenance, cold chain risk and advanced safety signal detection remain less consistently mature. North American delivery remains strongest, while European and APAC expansion continues through local hubs, acquisitions, nearshore capacity and partnerships. Enterprises should distinguish regional sales presence from demonstrated local delivery capabilities, regulatory expertise and specialist availability.

Outlook: Over the next 12-24 months, the market is likely to distinguish providers that can operationalize trusted AI from those that primarily demonstrate technical feasibility. Growth will favor bounded agentic workflows, connected knowledge foundations and reusable platforms that shorten regulated processes while preserving expert accountability. Enterprises should expect assistive and orchestrated AI to scale faster than fully autonomous decision-making.

ISG recommends that life sciences enterprises should:

- Prioritize data lineage, ontology alignment, access controls and evidence provenance before expanding AI across functions
- Define separate governance and value measures for copilots, workflow agents and autonomous actions
- Require production references, validation results, integration estimates and adoption evidence for provider assets
- Select providers based on functional depth and operating-model fit, not solely workforce scale or accelerator volume
- Retain internal accountability for scientific validity, patient safety, model risk and regulatory compliance

ISG suggests that providers should:

- Convert broad AI portfolios into smaller sets of production-proven, interoperable and governed solutions
- Strengthen expert-in-the-loop operations, adoption services and post-deployment value measurement
- Close gaps in manufacturing, supply-chain resilience and advanced pharmacovigilance capabilities
- Support model and cloud portability while clarifying IP ownership, licensing and long-term operating costs

North America will likely lead scaled deployment, while Europe will continue to influence governance standards, and APAC will generate selective growth through localized research and commercial ecosystems. Large providers will retain advantages in global transformation programs and ecosystem breadth. Specialist providers can outperform in areas where deep domain knowledge, speed and senior attention matter most. Across both groups, leadership will depend on linking trusted data, scientific context and operational execution to outcomes that users, executives and regulators can verify.

As AI adoption matures, life sciences enterprises are advancing beyond experimentation toward scalable, governed solutions that are embedded in workflows and decision-making. The strongest providers connect trusted data, domain expertise, reusable AI assets and operational execution to deliver measurable outcomes while maintaining scientific validity and regulatory accountability.

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Provider Positioning

	Specialty Analytics and AI Services — Life Sciences
Agilisium	Leader
Axtria	Leader
Brillio	Product Challenger
C5i	Leader
CitiusTech	Leader
Data41	Contender
Evalueserve	Product Challenger
Factspan	Contender
Fractal Analytics	Leader
fresh gravity	Contender
Infocepts	Rising Star ★

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Provider Positioning

	Specialty Analytics and AI Services — Life Sciences
Innominds	Product Challenger
Intuceo	Contender
Marlabs	Product Challenger
Mu Sigma	Product Challenger
Navikenz	Contender
Nexustek	Contender
Quantiphi	Leader
Rancho Biosciences	Contender
Straive	Leader
Tiger Analytics	Leader
ZS	Leader

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The study provides insights into **trends and provider capabilities** shaping the application of advanced analytics and AI in life sciences.

Simplified Illustration Source: ISG 2026

Specialty Analytics and AI Services — Life Sciences

Definition

The ISG Provider Lens® Specialty Analytics and AI Services – Life Sciences 2026 study offers the following to business and IT decision makers:

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

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

The life sciences industry is witnessing a fundamental shift as data and AI become central to how organizations innovate, operate and engage with members of the ecosystem. Enterprises are harnessing the value of data across the entire value chain, from research and discovery to clinical development, commercialization and post-market surveillance, to accelerate innovation, improve decision-making and enhance patient outcomes.

Next-generation analytics and AI are being increasingly applied to high-impact use cases, including derisking drug discovery, optimizing clinical trial design and execution, accelerating time-to-market and improving sales force effectiveness. Advanced techniques such as predictive modeling, GenAI and agentic AI enable deeper insight into disease progression, treatment effectiveness and safety, thus supporting more informed decision-making across R&D, medical affairs and commercial functions.

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Introduction

The growing availability of clinical, real-world and patient data is further strengthening risk management, regulatory readiness and ROI. At the same time, stringent regulatory mandates on data privacy, security and compliance continue to shape how analytics solutions are designed and deployed.

As technology adoption increases, life sciences enterprises are increasingly turning to service providers specializing in analytics and AI that can bring domain expertise, scientific rigor and execution maturity. These partners help organizations operationalize analytics, streamline value chain activities and deliver measurable improvements in R&D productivity, commercial performance and patient experiences in a highly regulated environment.

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Scope of the Report

This ISG Provider Lens® quadrant report covers the following one quadrant for services: Specialty Analytics and AI Services — Life Sciences

This ISG Provider Lens® study offers IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments (quadrants)
- Focus on the global market

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

Provider Classifications

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between $20 million and $999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens® quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens® quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

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Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/ services and follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

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Specialty Analytics and AI Services — Life Sciences

Who Should Read This Section

This report is valuable for providers offering specialty analytics and AI services — life sciences globally, to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence. It emphasizes how providers are embedding AI as a foundational capability to transform the life sciences value chain, from drug discovery to clinical trials, manufacturing and regulatory compliance, accelerating innovation and streamlining operations.

Chief data and AI officers

should read this report to explore providers that can assist in building data strategies, ensuring robust data governance and implementing AI and ML solutions. This report offers insights to facilitate the integration and accessibility of data across systems and sources and to operationalize AI and ML models across the life sciences value chain.

Industry leaders

should read this report to understand providers' relative positioning and competitive strengths, enabling information selection of life sciences analytics and AI services. This report also highlights emerging trends and benchmarks to guide practitioners in effectively integrating analytics and AI into drug development, commercialization and other business functions.

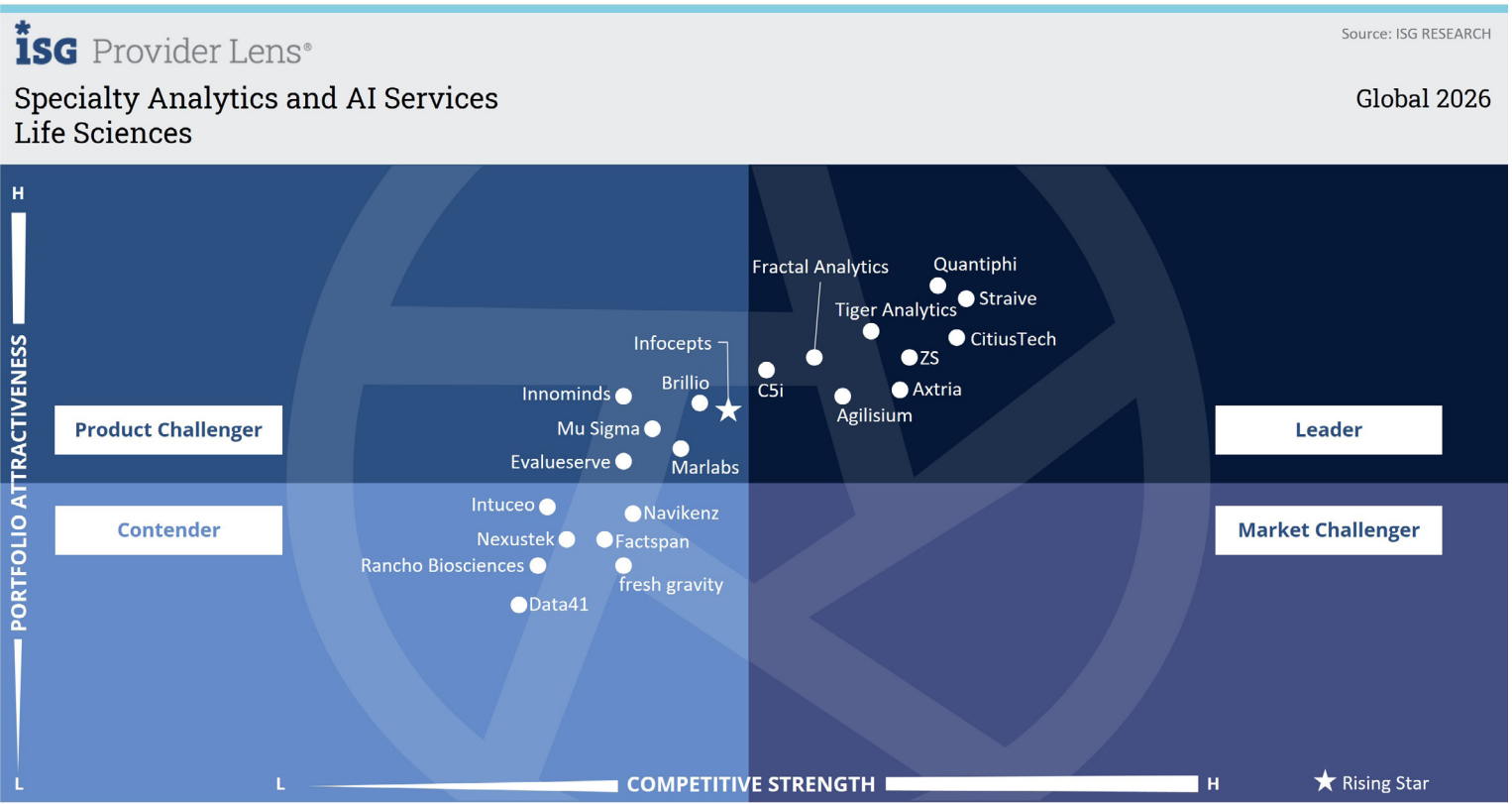
Life sciences professionals

should read this report to understand the competencies of analytics providers that can help in AI-led decision-making in clinical drug development and commercialization. It also thoroughly analyzes providers' capabilities to facilitate more effective decision-making throughout the drug development lifecycle, from optimizing clinical trial designs and patient recruitment to generating and leveraging real-world evidence.

Strategy professionals

should read this report to understand how providers help life sciences firms translate AI investments into long-term competitive advantage. The report provides insight into how providers combine domain expertise, AI advisory and engineering capabilities to build a future-ready organization that are scalable, resilient and responsive to market and regulatory dynamics.

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This quadrant assesses service providers delivering specialty analytics and AI across the life sciences value chain, with emphasis on **industry depth, scalable** data and AI capabilities, **responsible** adoption and **measurable** outcomes.

Manav Deep Sachdeva & Saravanan M S

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Definition

The study evaluates specialist providers delivering custom analytics and AI solutions for life sciences enterprises across the pre- and post-market value chain. These providers combine data science expertise, domain knowledge and execution depth to help organizations accelerate drug discovery, optimize clinical development, strengthen regulatory readiness and improve commercial effectiveness. They bring proven experience in developing use cases spanning R&D analytics, clinical trials, real-world evidence, pharmacovigilance and sales performance analytics. Providers are expected to demonstrate strong delivery capabilities, adhere to global best practices, and have robust partnerships and compelling technology roadmaps. They should be able to operationalize analytics at scale within highly regulated environments, deliver measurable value, and improve compliance and commercial outcomes.

This quadrant does not include platform vendors or large service providers offering life sciences analytics.

Eligibility Criteria

1. Demonstrate the capability to **ingest, integrate and harmonize data from multiple sources** across the life sciences value chain, including R&D, electronic medical records (EMR), safety, manufacturing, supply chain and commercial systems
2. **Apply advanced analytics, AI and ML models** to generate real-time, predictive and actionable insights that support drug discovery, clinical development, regulatory compliance and commercial decision-making
3. Operationalize analytics through **custom-built solutions, workflows and decision-support tools**, demonstrating end-to-end execution from design to deployment and delivering measurable impact on innovation speed, compliance and patient outcomes
4. Exhibit **end-to-end execution maturity,** from solution design and data engineering to model deployment, tuning and lifecycle governance
5. Deploy analytics at scale to **reinforce governance** controls, proactively **manage risks** and **strengthen regulatory compliance**

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Observations

The specialty analytics and AI services market for life sciences is moving from fragmented use cases and PoC initiatives to connected, AI-enabled decision systems embedded within regulated business workflows. Providers are increasingly differentiating through domain expertise, modern data foundations, reusable industry assets, AI engineering, responsible AI and the ability to translate technology into measurable business outcomes.

The quadrant establishes a baseline for a market that is still evolving rapidly. Competitive positioning is increasingly shaped by providers' ability to operationalize AI at scale, rather than merely demonstrating technical capabilities. Investments in agentic AI, knowledge foundations, workflow orchestration and managed operations are becoming more prominent, though maturity remains uneven across functions and providers.

The market is also witnessing more strategic ecosystem partnerships and capability consolidation, which are helping providers strengthen domain expertise, data and AI engineering and geographic reach, while enabling broader offerings spanning consulting, data engineering, AI development, implementation and managed operations.

Overall, the quadrant highlights an emerging divide between providers that can demonstrate AI capabilities and those that can connect trusted data, scientific context, AI innovation and operational execution. As adoption expands, leadership will increasingly depend on production maturity, responsible AI, measurable value and the ability to embed intelligence into regulated workflows while maintaining expert accountability.

From the 26 companies assessed for this study, 22 qualified for this quadrant, with nine being Leaders and one Rising Star.

Agilisium

Agilisium delivers domain-native analytics and agentic AI services across life sciences, combining cloud, data engineering and specialized platforms for discovery, clinical development, regulatory operations, manufacturing, commercial intelligence and patient engagement.

Axtria's AI-first data, analytics and commercial operations capabilities enable life sciences firms to improve clinical, commercial and patient outcomes through industrialized analytics and purpose-built platforms.

C5i's

C5i's integrated combination of reusable accelerators and semantic intelligence across commercial, clinical, R&D, regulatory and safety functions enables life sciences firms to harmonize data, accelerate insight generation and operationalize governed AI-driven decisions.

CitiusTech helps life sciences enterprises modernize clinical and research data, automate document-intensive workflows and operationalize AI across trials, evidence and regulatory functions through reusable accelerators and responsible AI engineering.

Fractal Analytics combines life sciences domain expertise, data foundations and AI-native workflow design to operationalize trusted decisions across trial execution, commercial and manufacturing analytics.

Quantiphi uses domain accelerators, multi-modal AI and compliant cloud data platforms to operationalize intelligence across drug discovery, clinical, RWE, safety and regulatory functions.

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Straive

Straive enables pharmaceutical and biotechnology firms to convert unstructured scientific and clinical content into actionable intelligence through a combination of semantic search, knowledge graphs, document automation and governed agentic workflows.

Tiger Analytics

Tiger Analytics combines AI-native engineering, open IP accelerators and governed agentic platforms to transform commercial and manufacturing analytics, helping life sciences firms embed intelligent decision-making directly into their workflows.

ZS

ZS brings a strong platform-led approach to life sciences transformation, connecting advanced analytics with domain-specific algorithms to improve study design, stakeholder engagement, patient support and commercial execution.

Infocepts

Infocepts (Rising Star) integrates platform modernization with AI-enabled workflow orchestration to harmonize fragmented safety, medical and commercial data, providing pharmaceutical and biotechnology firms with a connected foundation for enterprise decision intelligence.

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Leader

"Tiger Analytics uses predictive analytics, scenario modeling, data engineering and governed AI to translate operational data into decisions that improve commercialization, manufacturing planning and supply chain performance."

Manav Deep Sachdeva & Saravanan M S

Tiger Analytics

Overview

Tiger Analytics is headquartered in California, U.S., and operates across more than 10 countries worldwide. The company's capabilities cover the end-to-end life sciences value chain, spanning drug discovery, clinical development, operations, regulatory reporting, manufacturing and commercialization. Its delivery model combines domain consulting, data engineering and management, AI and ML model development, reusable accelerators and insight generation to help pharmaceutical enterprises unify market and operational information, improve planning and embed scalable decision support within business workflows.

Strengths

Connected intelligence for trial planning and molecular discovery: Tiger Analytics' PhoenixLS solution establishes a unified intelligence workspace across scientific, clinical, regulatory and commercial functions. It combines contextual reasoning with capabilities for clinical portfolio monitoring, KOL discovery and molecule design to accelerate decision-making across the drug development lifecycle.

Commercialization decision modeling: Tiger Analytics offers end-to-end commercial analytics covering launch planning, forecasting, marketing mix, HCP segmentation, sales force effectiveness and omni-channel engagement. Its TA Forecaster solution addresses patient, demand and revenue planning and the Next Best Action (NBX) module helps HCPs with personalized engagement and omni-channel interaction optimization.

Agentic AI-driven medical, legal and regulatory (MLR) review automation: Tiger Analytics' MLR solution uses an agentic AI framework to streamline MLR review of promotional and scientific content. The solution automates asset movement, review package generation, content comparison and compliance checks, reducing manual bottlenecks across approval workflows. Its scalable architecture supports enterprise-specific configurations, complex content layouts and multi-lingual requirements, while retaining human oversight.

Caution

Tiger Analytics should continue to develop its pharmacovigilance and drug safety intelligence capabilities to expand its regulated operations coverage and create stronger continuity between clinical, regulatory and patient intelligence.

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Appendix

Methodology & Team

The ISG Provider Lens® 2026 – Specialty Analytics and AI – Life Sciences study analyzes the relevant service providers in the global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

Study Sponsor:
Namratha Dharshan

Lead Authors:
Manav Deep Sachdeva and Saravana M S

Editor:
Ananya Mukherjee

Research Analyst:
Saravanan M S

Data Analyst:
Tishya Selvaraj

Consultant Advisors:
Gowtham Kumar Sampath, Olga Kupriyanova and Ryan Hamze

Project Manager:
Sukanya Nair

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The research and analysis presented in this report includes research from the ISG Provider Lens® program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. The data collected for this report represent information that ISG believes to be current as of October 2026 for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

All revenue references are in U.S. dollars ($US) unless noted otherwise.

The study was conducted in the following steps:

1. Definition of Specialty Analytics and AI Services – Life Sciences market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Leverage ISG's internal databases and advisor knowledge & experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts & figures received from providers and other sources.
6. Use of the following key evaluation criteria:
   * Strategy and vision
   * Innovation
   * Brand awareness and presence in the market
   * Sales and partner landscape
   * Breadth and depth of portfolio of services offered
   * Technology advancements

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Lead Author



Manav Deep Sachdeva

Senior Manager and Principal Analyst

Manav Deep Sachdeva is a Senior Manager and Principal Analyst in ISG's Provider Lens® Research team, with over 14 years of experience across research, consulting, and advisory roles. A former Gartner analyst, Manav has advised CXOs globally on technology strategy, vendor selection, and innovation roadmaps.

He has authored several thought-provoking research reports, including Magic Quadrants, Hype Cycles, and decision-making frameworks that help enterprise leaders evaluate technologies and prioritize investments.

His work spans legacy modernization, data analytics, AI, and automation, with a strong emphasis on translating emerging technologies into measurable business impact.

In his previous role, Manav served as an in-house consultant at an insurance company, partnering closely with IT and business leaders while leading innovation and digital sales initiatives.

Co - Author and Research Analyst



Saravanan M S

Senior Lead Analyst

Saravanan M S is a Senior Lead Analyst at ISG Research, with over 10 years of experience across research and consulting roles. He specializes in market intelligence, competitive benchmarking and provider ecosystem analysis with a strong focus on AI-led transformation, data modernization and ecosystem-driven innovation, shaping perspectives on emerging AI paradigms. He authors ISG Provider Lens® reports on advanced analytics & AI services, palantir-ecosystem partners and AI-industry intersection reports for retail, CPG, supply chain, life sciences and healthcare.

Saravanan contributes to thought leadership initiatives through whitepapers, articles and capability reports across the data, analytics and AI spectrum, helping organizations translate emerging technologies into actionable strategies.

In his previous role, Saravanan has led several research and consulting engagements, delivering opportunity identification frameworks and strategic insights to clients.

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Study Sponsor



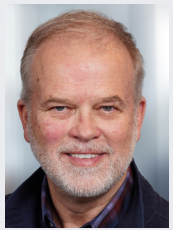
Namratha Dharshan

Chief Business Leader

Namratha brings over 19 years of market research experience, leading the ISG Provider Lens® program focused on BPO, AI and Analytics. Namratha also leads the India Research team and is a speaker on ISG's flagship platform, the ISG Index. She leads the ISG Provider Lens® BPO charter, which includes coverage of AI, GenAI and analytics. The program includes more than 20 different reports. She is also responsible for delivering research on service provider intelligence. As part of her role, she heads a team of analysts and manages the delivery of research reports for the ISG Provider Lens® program.

She is a principal analyst responsible for authoring thought leadership papers and service provider intelligence reports in the areas of BPO, customer experience and contact center services. She has also authored other horizontal service line reports, such as finance and accounting, and vertical-focused reports for insurance. She is also part of the Senior Leadership Council for India Research and represents a team of over 100 research professionals.

IPL Product Owner



Jan Erik Aase

Partner and Global Head – ISG Provider Lens®/ISG Research

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes;. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry.

Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor. Now as a partner and global head of ISG Provider Lens®, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

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ISG Provider Lens®

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

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