

Black Book **Insights**

AI-ENABLED HEALTHCARE TECHNOLOGY, PLATFORMS, SOFTWARE & SERVICES PHARMACEUTICAL, BIOTECHNOLOGY & LIFE SCIENCES Q3 2026

**Integrated Client-Rated Category Performance, Dark-Horse
Challengers, Startup & Scaleup Watchlists and an Alphabetical
Market Directory**

*Independent buyer and user intelligence for healthcare and life
sciences technology markets*

*A Black Book Research Report Prepared in Collaboration With Applied
Artificial Intelligence LLC*

BLACK BOOK RESEARCH

Independent Healthcare Technology, Services, and Vendor Performance Research

APPLIED ARTIFICIAL INTELLIGENCE LLC

Financial and Technological Advisement | AI Engagement Leadership | Project
and Initiative Support

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REPORT CONTENTS

This Black Book market-performance benchmark evaluates healthcare technology, platforms, software and services used by pharmaceutical, biotechnology, diagnostics, research, manufacturing and life-sciences organizations. It combines one consistent 18-KPI measurement model across 28 market categories and 29 award scorecards with dark-horse and startup/scaleup intelligence for every category.

REPORT SCOPE

The benchmark is organized by the purchasing decision: technology infrastructure, platform, application software or service delivery. Products are compared only when users buy them for materially similar purposes.

Executive Summary

SECTION 01	Market Scope and Measurement Model
SECTION 02	Respondent Base and Methodology
SECTION 03	Cross-Lifecycle Technology Market Architecture
SECTION 04	Black Book 18-KPI Performance Framework
SECTION 05	State of the Market 2026-2027
SECTION 06	How to Read the Integrated Category Profiles
SECTION 07	Discovery and Preclinical Performance & Market Intelligence
SECTION 08	Clinical Development and Evidence Performance & Market Intelligence
SECTION 09	Safety, Regulatory, Data and Diagnostics Performance & Market Intelligence
SECTION 10	Manufacturing, Quality and Supply Chain Performance & Market Intelligence
SECTION 11	Medical, Commercial and Enterprise Services Performance & Market Intelligence
SECTION 12	2027 Outlook and Buyer Priorities
SECTION 13	Appendix A Category and Product Normalization Rules
	Appendix B Alphabetical Market Participant and Vendor Capability Directory
	Appendix C Research Sources and About Black Book

RESEARCH INTEGRITY AND AWARD USE

Black Book rankings measure current buyer and user experience within a defined market. A prior-year award does not transfer automatically, a parent-company reputation does not substitute for product-level evidence, and vendors cannot purchase inclusion or rank position. Dark-horse and startup/scaleup designations are reported separately from Black Book scores and do not constitute Black Book performance awards.

Conference and market references provide context for industry priorities. Black Book Research remains independent of associations and conference producers and is not presented as an organizer, sponsor or endorsed research partner of any such event.

EXECUTIVE SCORECARD

Black Book Research has expanded the original State of AI concept into a broader and more accurate market-performance benchmark: AI-Enabled Healthcare Technology, Platforms, Software & Services Across Pharmaceutical, Biotechnology & Life Sciences 2026-2027. The revised scope reflects what Black Book actually measures - the performance of technologies, platforms, applications, data products and service partners in live scientific, clinical, regulatory and operating environments.

1,277

VERIFIED
RESPONDENTS

28

MARKET
CATEGORIES

29

AWARD
SCORECARDS

18

KPIs PER
CATEGORY

WHAT THE 2026-2027 BENCHMARK ESTABLISHES

- One uniform performance framework now covers healthcare technology, platforms, software modules and services rather than treating AI as a standalone product category.
- Twenty-eight market categories and twenty-nine scorecards separate materially different purchasing decisions, including two distinct supply-chain indexes.
- Each scorecard is followed by a uniform competitive-intelligence profile covering category features, dark-horse challengers, startup and scaleup watchlists, and the market evidence required to alter the ranking order.
- Real-world evidence is divided into self-service analytics, data networks and linkage, and HEOR/market-access evidence services so no vendor benefits from an overly broad category.
- AI-ready clinical and translational data operating platforms are measured as a distinct market, with semantic validation, cross-source harmonization, customer-controlled multimodal data and time to usable research data as category-specific criteria.
- Clinical-trial technology coverage now includes eClinical execution, decentralized trials, digital biomarkers, connected devices and automated trial-quality intelligence.
- Life-sciences market coverage now extends beyond R&D into medical affairs, commercial technology, AI governance, systems integration and managed services.
- Vendor scores are tied to the named product or service and cannot be inherited from a parent company, adjacent module or acquisition.
- Every category maintains the same award eligibility, validation and scoring controls while retaining six specialized KPIs for scientific and operating relevance.

PRINCIPAL MARKET CONCLUSIONS

Life-sciences buyers are moving from isolated model demonstrations to governed production workflows. The decisive questions are no longer limited to algorithm novelty. Buyers are measuring data fitness, interoperability, scientific validity, regulatory readiness, implementation quality, user adoption, service execution and documented return on investment.

The strongest near-term purchasing activity spans five connected layers: evidence generation, clinical operations, data foundations, regulated manufacturing/quality and enterprise governance. The most defensible leaders are those that combine domain specificity with deployment depth and service accountability rather than relying on generic AI positioning.

BLACK BOOK CONCLUSION

The life-sciences AI market is no longer one market. It is a portfolio of scientific, clinical, regulated operating and enterprise-service markets that require separate client scorecards and product-level evidence.

STUDY POPULATION

The respondent base includes 1,277 verified leaders and direct users from pharmaceutical companies, biotechnology developers, CROs, CDMOs, diagnostics and genomics companies, academic research networks, RWE and HEOR organizations, laboratories, clinical-supply specialists, logistics providers and life-sciences technology and service firms. Detailed organization and title distributions appear in Section 2.

STUDY PRINCIPALS

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ABOUT THIS COLLABORATION

This report reflects a collaboration between **Black Book Research** and **Applied Artificial Intelligence LLC**. Black Book contributes independent healthcare market research, stakeholder survey intelligence, vendor performance analysis, and technology benchmarking. Applied Artificial Intelligence LLC contributes financial and technological advisory perspective, including temporary leadership and strategic support for artificial intelligence engagements, projects, and initiatives.

Together, the organizations provide a practical, market-informed view of healthcare technology adoption, artificial intelligence strategy, operational readiness, vendor performance, and implementation risk.

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PREPARED FOR INDUSTRY PUBLICATION, EXECUTIVE REVIEW, AND STRATEGIC TECHNOLOGY DECISION SUPPORT.

BLACK BOOK CLIENT-RATED VENDOR PERFORMANCE LEADERS, 2026

Black Book 2026 Category Leaders, Top Contenders, Dark Horses and Startup/Scaleup Watchlist

The **Top 2026 Contender** column identifies the vendor ranked **#2** in the corresponding **Black Book Client-Rated Vendor Performance** scorecard. Black Book scores have been removed as requested.

Category	Black Book Survey Category	#1 Black Book Client-Rated Vendor / Platform / Service	Top 2026 Contender	Featured Dark Horse	Startup / Scaleup to Watch
1	AI drug target discovery and pathway modeling	Insilico Medicine	Recursion (including Exscientia)	Aitia	Relation Therapeutics
2	Generative small-molecule design and optimization	Schrödinger	Insilico Medicine	Iktos	Phare Bio
3	AI protein, antibody and biologics design	Generate Biomedicines	Absci	LabGenius	Cradle
4	Biomarker, multi-omics and precision-research intelligence	Tempus AI	SOPHiA GENETICS	Seven Bridges	Ataraxis AI
5	Scientific literature, patent and knowledge mining	Clarivate Cortellis	Causaly	BenchSci	Causaly
6	Digital twins, biosimulation and in silico development	Certara	Unlearn	QuantHealth	Quris-AI
7	Protocol design, feasibility and trial simulation	Medidata	Phesi	Lokavant	Faro Health
8	Trial site selection, recruitment and patient matching	Tempus AI / Deep 6 AI	TriNetX	Trialbee	Ryght AI
9	eClinical and decentralized trial execution	Medidata	Veeva	Castor	Curebase
10	Clinical data review, RBQM and automated trial-quality intelligence	CluePoints	Saama	Lokavant	Beaconcure
11	Digital biomarkers, connected devices and remote trial monitoring	ActiGraph	Koneksa	Evidation	Koneksa
12	AI-enabled self-service RWE analytics and cohort intelligence	Veradigm	Datavant / Aetion	Komodo Health	Atropos Health
13	RWD networks, linkage, tokenization and external controls	Datavant / Aetion	IQVIA	TriNetX	Novellia
14	HEOR, market access, pricing and evidence strategy technology/services	IQVIA	Clarivate	Avalere	Genesis Research
15	Pharmacovigilance and safety-signal intelligence	ArisGlobal	Oracle Life Sciences	RxLogix	Quantum PV
16	Regulatory intelligence, RIM and submission-content automation	Veeva	Clarivate Cortellis	Yseop	RegASK

Category	Black Book Survey Category	#1 Black Book Client-Rated Vendor / Platform / Service	Top 2026 Contender	Featured Dark Horse	Startup / Scaleup to Watch
17	AI-ready clinical and translational data operating platforms	InterSystems IRIS for Health / HealthShare	Oracle Health / Life Sciences AI Data Platform	Health Catalyst Ignite	CognomiQ
18	Genomics, bioinformatics and precision-medicine workflow platforms	DNAexus	Illumina Connected Analytics	Fabric Genomics	Nostos Genomics
19	Digital pathology, imaging AI and companion-diagnostic development	PathAI	Paige	Aiforia	Proscia
20	Laboratory informatics, scientific data and autonomous-lab enablement	Siemens (including Dotmatics)	Benchling	LabVantage	Artificial
21	Process development, formulation, scale-up and technology transfer	Siemens	Dassault Systèmes BIOVIA	Sartorius	Aizon
22	GxP smart manufacturing, MES, digital twins and advanced process control	Siemens	Rockwell Automation	AspenTech	Apprentice
23	Predictive quality, deviations, CAPA, batch review and validation intelligence	Veeva	Honeywell TrackWise	ValGenesis	Dot Compliance
24A	Supply planning, demand forecasting, inventory and resilience	Kinaxis	o9 Solutions	TraceLink	Aera Technology
24B	Clinical supply, cold chain, serialization and chain-of-identity intelligence	Controlant	TraceLink	Sensitech	SkyCell
25	Medical affairs, scientific engagement and omnichannel content intelligence	Veeva Medical	Indegene	Envision Pharma Group	H1
26	Commercial analytics, CRM, launch and field-force intelligence	Veeva Vault CRM / Nitro	Salesforce Life Sciences Cloud	Axtria	PharmaForceIQ
27	AI governance, model validation, MLOps, cybersecurity and controlled deployment	SAS	Dataiku	Arize AI	Credo AI
28	Life-sciences AI consulting, systems integration and managed services	Accenture	Deloitte	Tata Consultancy Services	Quantori

01

MARKET SCOPE AND MEASUREMENT MODEL

A PERFORMANCE BENCHMARK, NOT A GENERIC AI LANDSCAPE

Black Book measures whether a healthcare or life-sciences technology performs for the people responsible for selecting, implementing, validating, operating and using it. The unit of analysis is therefore the defined product, platform, technology stack or service engagement - not the general corporate brand and not the amount of media attention surrounding the vendor.

AI is evaluated as an enabling capability inside the relevant market. A clinical-trial platform, RWE analytics environment, manufacturing execution system, pharmacovigilance application or consulting engagement must first perform its required business and scientific function. Its AI capabilities are then measured for reliability, explainability, workflow fit, governance and incremental value.

FOUR ASSET CLASSES MEASURED CONSISTENTLY

Asset Class	Included Scope	Primary Black Book Performance Lens
Technology infrastructure	Data, compute, interoperability, instruments, sensors and validated technical foundations	Performance, reliability, scalability, security, standards and lifecycle support
Platforms	Cross-workflow operating environments and data/application layers	Breadth, extensibility, governance, integration, user access and enterprise value
Software applications	Purpose-built modules for defined scientific, clinical or operating workflows	Functional depth, usability, automation, accuracy, compliance and measurable outcomes
Services	Advisory, implementation, managed operations, scientific services and outsourced execution	Expertise, accountability, delivery quality, transparency, knowledge transfer and sustained value

LIFE-SCIENCES ORGANIZATIONS IN SCOPE

The benchmark covers the full commercial and research ecosystem rather than limiting the analysis to large pharmaceutical manufacturers. Appropriate market cuts are produced for global and midmarket pharma, clinical-stage and commercial-stage biotech, cell and gene therapy, diagnostics and precision medicine, CROs and research networks, CDMOs and CMOs, academic and translational institutions, laboratories, RWE/HEOR organizations, clinical-supply and logistics specialists, and technology or managed-service partners.

CROSS-LIFECYCLE COVERAGE

Lifecycle Domain	Technology, Platform, Software And Service Coverage
Discovery and preclinical	Targets, molecules, biologics, biomarkers, knowledge mining and biosimulation
Clinical development	Protocol intelligence, feasibility, recruitment, eClinical execution, RBQM and digital endpoints
Evidence, safety and regulatory	RWE, RWD networks, HEOR, pharmacovigilance, RIM and submission automation
Data, diagnostics and laboratories	AI-ready data platforms, genomics, pathology, imaging, LIMS, ELN and scientific data
Development, manufacturing and quality	Process development, tech transfer, MES, advanced process control, quality and validation
Supply, medical and commercial	Supply planning, clinical supply, medical affairs, CRM, launch and market execution
Enterprise governance and services	AI governance, MLOps, cybersecurity, systems integration and managed delivery

REGULATORY AND QUALITY CONTEXT

The performance framework reflects the life-cycle orientation now used by regulators. FDA and EMA principles emphasize a clear context of use, risk-based controls, data governance, documentation, human oversight, performance assessment and lifecycle management for AI used in drug and biological product development.[1][2] The final ICH E6(R3) Good Clinical Practice guidance also strengthens quality-by-design and risk-proportionate use of technology in clinical research.[3]

These expectations apply differently across discovery, trials, evidence, manufacturing and post-market activities. Black Book therefore measures regulatory readiness and validation consistently but does not force every category into the same technical implementation model.

02

RESPONDENT BASE AND METHODOLOGY

The 2026 benchmark includes 1,277 verified respondents representing buyers, executive sponsors, scientific and operational leaders, technical evaluators, implementation owners, governance leaders and direct users. Respondents were qualified by role, organization, current product exposure and ability to evaluate the named

1,277

RESPONDENTS

14

INDUSTRY SECTORS

18

TITLE GROUPS

7

GEOGRAPHIC REGIONS

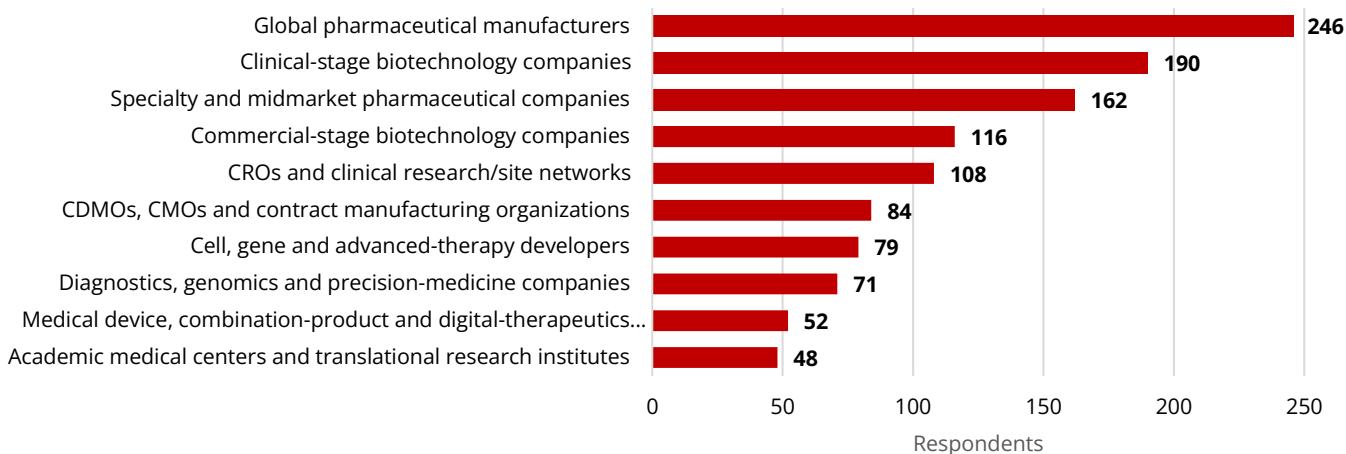
RESPONDENT DISTRIBUTION BY ORGANIZATION SECTOR

Organization Sector	Respondents	Share
Global pharmaceutical manufacturers	246	19.3%
Specialty and midmarket pharmaceutical companies	162	12.7%
Clinical-stage biotechnology companies	190	14.9%
Commercial-stage biotechnology companies	116	9.1%
Cell, gene and advanced-therapy developers	79	6.2%
CROs and clinical research/site networks	108	8.5%
CDMOs, CMOs and contract manufacturing organizations	84	6.6%
Diagnostics, genomics and precision-medicine companies	71	5.6%
Medical device, combination-product and digital-therapeutics organizations	52	4.1%
Academic medical centers and translational research institutes	48	3.8%
RWE, HEOR, evidence networks and research consortiums	41	3.2%
Specialty laboratories, biobanks, pathology and imaging networks	30	2.3%
Clinical supply, cold-chain, serialization and logistics organizations	25	2.0%
Regulatory, safety, consulting, systems-integration and managed-service firms	25	2.0%

FIGURE 1

LARGEST RESPONDENT ORGANIZATION SECTORS.
COUNTS SUM TO THE 1,277-PERSON RESPONDENT BASE.

Largest Respondent Organization Sectors (n=1,277)



RESPONDENT TITLES AND FUNCTIONAL RESPONSIBILITIES

Title Or Functional Responsibility	Respondents	Share
CIO, CTO, CDO, CAIO or Chief Digital/Technology Officer	82	6.4%
SVP/VP of IT, data, digital transformation or AI	88	6.9%
Director/Head of data science, AI or machine learning	96	7.5%
Clinical development and clinical operations leadership	90	7.0%
R&D, discovery, preclinical and translational leadership	96	7.5%
Bioinformatics, computational biology and omics leadership	64	5.0%
RWE, HEOR, epidemiology and outcomes-research leadership	78	6.1%
Regulatory affairs, RIM and submission leadership	64	5.0%
Drug safety and pharmacovigilance leadership	56	4.4%
Manufacturing, MSAT and technical-operations leadership	82	6.4%
Quality, validation, compliance and audit leadership	74	5.8%
Supply chain, clinical supply, procurement and logistics leadership	64	5.0%
Laboratory informatics and scientific-data leadership	61	4.8%
Medical affairs and market-access leadership	49	3.8%
Commercial, CRM, launch and field-analytics leadership	46	3.6%
Information security, privacy and AI-governance leadership	39	3.1%
Finance, strategy, business development and portfolio leadership	36	2.8%
Scientists, analysts, administrators, site operations and direct users	112	8.8%

RESPONDENT SENIORITY

Seniority	Respondents	Share
C-suite and executive vice president	139	10.9%
Senior vice president, vice president and functional head	301	23.6%
Director and senior director	418	32.7%
Manager, lead and principal	281	22.0%
Scientist, analyst, administrator and direct user	138	10.8%

ORGANIZATION SCALE AND DEVELOPMENT STAGE

Organization Profile	Respondents	Share
Large/global enterprise pharma and diversified life sciences	298	23.3%
Midmarket commercial pharma, biotech and medtech	242	19.0%
Emerging clinical-stage biotechnology	216	16.9%
Preclinical and venture-backed biotechnology	128	10.0%
CRO, CDMO, data, technology and service providers	246	19.3%
Academic, public and nonprofit research networks	85	6.7%
Specialty laboratory, diagnostic and logistics organizations	62	4.9%

GEOGRAPHIC DISTRIBUTION

Region	Respondents	Share
United States	752	58.9%
Canada	72	5.6%
United Kingdom and Ireland	104	8.1%
European Union/EEA excluding Ireland	180	14.1%
Asia-Pacific	105	8.2%
Latin America	31	2.4%
Middle East and Africa	33	2.6%

RESPONDENT AND PRODUCT-EVALUATION QUALIFICATION

Qualification Dimension	Black Book Requirement
Role qualification	Direct user, executive sponsor, scientific or operating owner, technical evaluator, implementation leader, buyer or governance leader.
Current exposure	Used, administered, implemented, validated, managed or directly oversaw the named product or service during the preceding 18 months.
Deployment threshold	Pilot, limited production or enterprise production; demonstrations, press coverage and proposal reviews alone do not qualify.
Product specificity	The rated product, module, platform or service engagement must be identified. Corporate reputation cannot substitute for product exposure.
Conflict control	Vendor employees cannot rate their own company. Vendor-provided client contacts are independently verified and cannot dominate a category.
Response integrity	Duplicate, inconsistent, unverifiable and over-concentrated submissions are removed before scoring.

RANKING AND AWARD ELIGIBILITY

Status	Requirement
Descriptive market inclusion	At least 8 qualified evaluations from 4 distinct client organizations.
Published ranked vendor	At least 12 qualified evaluations from 4 distinct client organizations.
Category-winner eligibility	At least 20 qualified evaluations from 7 distinct client organizations.
Client concentration	No single organization may determine more than 20% of a category score.
Critical performance floor	No category winner may fall below 7.75 on a critical regulatory, data-integrity, security or service KPI.
Repeat award	Prior-year results receive no weight. The current product must meet the current category and evidence standard.

INDEPENDENT RANKINGS

Vendors cannot purchase inclusion, award eligibility, score interpretation or rank position. Black Book evaluates like-with-like products and publishes fewer than ten vendors when fewer than ten meet the evidence threshold.

03

CROSS-LIFECYCLE TECHNOLOGY MARKET ARCHITECTURE

The revised architecture contains 28 market categories and 29 award scorecards. Category 24 is divided into enterprise supply planning and clinical-supply/cold-chain traceability because those products solve materially different purchasing problems. Each category may include technologies, platforms, software applications and specialist services when buyers evaluate them for the same outcome.

#	Lifecycle Domain	Performance Category	Defined Comparison Scope
1	Discovery & preclinical	AI drug target discovery and pathway modeling	Target identification, causal biology, disease networks, pathway prioritization and sponsor-partner execution.
2	Discovery & preclinical	Generative small-molecule design and optimization	Molecular generation, virtual screening, medicinal chemistry optimization, ADMET prediction and design-make-test-learn acceleration.
3	Discovery & preclinical	AI protein, antibody and biologics design	Protein engineering, antibody design, affinity and developability prediction, immunogenicity and multimodal biologics optimization.
4	Discovery & preclinical	Biomarker, multi-omics and precision-research intelligence	Genomic, transcriptomic, proteomic, imaging and clinical-data analysis for biomarker discovery and patient stratification.
5	Discovery & preclinical	Scientific literature, patent and knowledge mining	NLP, semantic search, evidence synthesis, patent intelligence, competitive landscapes and scientific knowledge graphs.
6	Discovery & preclinical	Digital twins, biosimulation and in silico development	Quantitative systems pharmacology, virtual populations, disease progression, synthetic control and trial simulation.
7	Clinical development	Protocol design, feasibility and trial simulation	Protocol optimization, eligibility design, scenario testing, feasibility, country/site planning and enrollment forecasting.
8	Clinical development	Trial site selection, recruitment and patient matching	Site intelligence, cohort discovery, patient matching, referral, diversity, enrollment and retention performance.
9	Clinical development	eClinical and decentralized trial execution	CTMS, EDC, eSource, eConsent, eCOA, eTMF, IRT and decentralized/hybrid-trial technology and services.
10	Clinical development	Clinical data review, RBQM and automated trial-quality intelligence	Central monitoring, anomaly detection, risk-based quality management, data review, query management and quality signals.
11	Clinical development	Digital biomarkers, connected devices and remote trial monitoring	Wearables, sensors, digital endpoints, remote measurement, participant adherence and regulatory-grade signal processing.
12	Evidence & market access	AI-enabled self-service RWE analytics and cohort intelligence	Cohort construction, phenotyping, NLP extraction, comparative analysis, reproducibility and user-directed evidence generation.
13	Evidence & market access	RWD networks, linkage, tokenization and external controls	Data networks, privacy-preserving linkage, tokenization, provenance, external comparators and regulatory-grade evidence assets.
14	Evidence & market access	HEOR, market access, pricing and evidence strategy technology/services	Economic modeling, outcomes research, value dossiers, pricing, reimbursement, payer evidence and evidence strategy services.

#	Lifecycle Domain	Performance Category	Defined Comparison Scope
15	Safety & regulatory	Pharmacovigilance and safety-signal intelligence	Case intake, duplicate detection, coding, narratives, aggregate reporting, literature surveillance and signal management.
16	Safety & regulatory	Regulatory intelligence, RIM and submission-content automation	Regulatory information management, publishing, authoring, content reuse, health-authority intelligence and submission operations.
17	Data foundation	AI-ready clinical and translational data operating platforms	Multimodal ingestion, semantic harmonization, validation, interoperability, cohort tools, governance and AI-ready customer-controlled data.
18	Data & diagnostics	Genomics, bioinformatics and precision-medicine workflow platforms	Genomic analysis, variant interpretation, multi-omics workflows, secure collaboration and clinical/translational bioinformatics.
19	Data & diagnostics	Digital pathology, imaging AI and companion-diagnostic development	Pathology and imaging workflow AI, quantitative biomarkers, companion diagnostics, validation and clinical-research integration.
20	Laboratory & science	Laboratory informatics, scientific data and autonomous-lab enablement	LIMS, ELN, SDMS, instrument integration, scientific data clouds, lab automation and experiment orchestration.
21	Development & manufacturing	Process development, formulation, scale-up and technology transfer	Process modeling, formulation, design of experiments, scale-up, tech transfer, comparability and development knowledge management.
22	Development & manufacturing	GxP smart manufacturing, MES, digital twins and advanced process control	MES, electronic batch records, process analytics, PAT, digital twins, predictive operations and manufacturing execution.
23	Quality & validation	Predictive quality, deviations, CAPA, batch review and validation intelligence	Quality management, deviation triage, root cause, CAPA, validation, document review, inspection readiness and release support.
24A	Supply chain	Supply planning, demand forecasting, inventory and resilience	Network planning, demand sensing, launch readiness, inventory, shortage risk, supplier visibility and scenario optimization.
24B	Supply chain	Clinical supply, cold chain, serialization and chain-of-identity intelligence	IRT/RTSM, packaging, labeling, temperature, logistics, serialization, cell/gene chain of identity and patient-level traceability.
25	Medical & external engagement	Medical affairs, scientific engagement and omnichannel content intelligence	Medical strategy, evidence dissemination, publications, congresses, MSL insights, compliant content and stakeholder engagement.
26	Commercial operations	Commercial analytics, CRM, launch and field-force intelligence	Life-sciences CRM, next-best action, customer intelligence, territory, launch, forecasting, omnichannel and field execution.
27	Enterprise governance	AI governance, model validation, MLOps, cybersecurity and controlled deployment	Model inventory, risk classification, monitoring, change control, validation, security, privacy and regulated AI operations.
28	Enterprise services	Life-sciences AI consulting, systems integration and managed services	Strategy, operating model, implementation, integration, data engineering, validation, change management and managed delivery.

CATEGORY BOUNDARY RULES

- Compare products only when they address the same purchasing outcome and user population.
- Rate the named product or module; do not transfer a score from an adjacent product owned by the same company.
- Separate installed software from sponsor-rated scientific partnerships when implementation and commercial models differ materially.
- Separate enterprise platforms from specialist products when breadth would otherwise mask use-case performance.
- Use category-specific sub-indexes when a single label contains distinct operating markets.
- Publish emerging-vendor recognition only when current evidence is insufficient for a full ranked award.

04

BLACK BOOK 18-KPI PERFORMANCE FRAMEWORK

Every category is scored through eleven universal KPIs, six market-specific KPIs and one explicit return-on-investment KPI. The same structure supports uniformity across technologies, platforms, software and services while preserving the scientific and operating differences between discovery, clinical, evidence, regulatory, manufacturing and commercial markets.

ELEVEN UNIVERSAL LIFE SCIENCE TECHNOLOGY KPIs

KPI	Universal Performance Measure
1	Achievement of the intended scientific, clinical or operating outcome
2	Accuracy, scientific validity, robustness and reliability of outputs
3	Data quality, provenance, lineage and fitness for the defined use
4	User experience, usability, adoption and workflow acceptance
5	Interoperability, integration and fit with existing systems and processes
6	Implementation quality, time to value and change-management performance
7	Scalability, system performance, uptime and operational resilience
8	Privacy, cybersecurity, confidentiality and intellectual-property protection
9	Regulatory, GxP, validation and inspection-readiness performance
10	Explainability, auditability, reproducibility and model-change control
11	Vendor partnership, service delivery, support, training and roadmap execution

SIX MARKET-SPECIFIC KPIs

Market Group	Six Specialized KPI Subjects
Discovery and preclinical	Prospective experimental validation; novelty and biological plausibility; design-cycle reduction; developability; modality/therapeutic-area coverage; IP and data-rights clarity.
Clinical development	Protocol and feasibility accuracy; representative enrollment; site and participant performance; data quality; participant burden; integration with CTMS/EDC/eCOA and site workflows.
RWE, HEOR and market access	Data-source fitness; cohort transparency; phenotyping/NLP quality; causal-method support; linkage and tokenization; audit-ready evidence and value communication.
Safety and regulatory	Case and content quality; coding and narrative accuracy; signal intelligence; submission reuse; authority intelligence; reporting timeliness and inspection readiness.
Data, diagnostics and laboratories	Semantic fidelity; cross-source validation; multimodal data activation; instrument and workflow integration; lineage and reproducibility; time to research-ready data.
Manufacturing, quality and supply	Process-model validity; MES/PAT/ERP integration; yield and throughput; deviation/CAPA performance; batch review and release; shortage, inventory, cold-chain and traceability outcomes.
Medical, commercial and enterprise services	Stakeholder intelligence; compliant content and engagement; adoption by field teams; integration with CRM/data; delivery accountability; sustained knowledge transfer and business value.

ONE PRODUCE SPECIFIC KPI:
DEMONSTRATED RETURN ON INVESTMENT

STANDARD ROI MEASURE

Perceived and demonstrated return on investment from the organization's technology, platform, software application or service provider, including time saved, cycle-time reduction, quality improvement, risk reduction, revenue protection and measurable operating value.

Score Component	Weight
Universal KPIs 1-11	44%
Market-specific KPIs 12-17	46%
ROI KPI 18	10%
TOTAL	100%

BLACK BOOK RATING ANCHORS

Score Band	Interpretation
9.00-10.00	Market-leading performance; consistently exceeds requirements with validated value and limited material gaps.
8.00-8.99	Strong and reliable performance; competitive category depth with identifiable improvement opportunities.
7.00-7.99	Qualified performance; useful capabilities but meaningful execution, scale, service or integration limitations.
6.00-6.99	Mixed performance; substantial gaps or inconsistent client experience affect enterprise confidence.
Below 6.00	Performance does not meet the category standard for broad recommendation.

05

STATE OF THE MARKET 2026-2027

THE MARKET HAS SHIFTED FROM AI FEATURES TO OPERATING PERFORMANCE

Life-sciences organizations are no longer evaluating AI only through research pilots or isolated productivity tools. Buyers are determining whether AI-enabled capabilities can operate inside validated workflows, maintain data and model lineage, integrate with regulated systems, support human review and produce measurable scientific or operating value.

This change favors vendors that combine domain-specific workflows, credible data foundations and accountable implementation services. Generic AI capability remains important, but it is not sufficient in markets where the output influences trial quality, regulatory evidence, patient safety, product quality or supply continuity.

EIGHT MARKET DEVELOPMENTS SHAPING 2027 PURCHASING

Market Development	2026-2027 Implication
RWE specialization	Buyers distinguish self-service analytics from data linkage and from HEOR/market-access evidence services. Broad RWE awards increasingly obscure rather than clarify vendor performance.
Clinical technology consolidation	Sponsors are reducing disconnected point solutions while preserving best-of-breed tools for RBQM, recruitment, digital endpoints and complex trial operations.
Scientific-data foundations	Multimodal data quality, semantic harmonization and explainable cohort construction have become prerequisites for scalable AI and translational research.
Regulated AI governance	Risk classification, context-of-use documentation, model inventory, monitoring and change control are becoming formal enterprise operating requirements.
Manufacturing and quality ROI	Process, deviation, batch-review and supply applications are producing clearer operational measures than many exploratory discovery deployments.
Agentic workflow controls	Life-sciences organizations are permitting bounded assistance more readily than unsupervised execution; reconstructable actions and approval gates remain central.
Services as a performance differentiator	Implementation, validation, data engineering, workflow redesign and managed operations increasingly determine whether software value is realized.
Commercial and medical convergence	Medical affairs, market access and commercial teams are adopting connected customer, evidence and content platforms with stronger compliance and insight controls.

AI GOVERNANCE BECOMES A DISTINCT BUYING MARKET

AI governance is no longer adequately covered by a generic security or data-management score. Category 27 measures the technology and operating controls required to inventory models, classify risk, validate performance, monitor drift, manage versions, control access, document human review and maintain audit-ready evidence across regulated use cases.

SERVICES REQUIRE THEIR OWN PERFORMANCE STANDARD

Category 28 recognizes that life-sciences buyers frequently purchase outcomes through advisory, systems integration, data engineering, validation, implementation and managed services. Service providers are measured on delivery quality, domain expertise, transparency, accountability, knowledge transfer, change management and sustained operating value - not only on the software they recommend.

MANUFACTURING, QUALITY AND SUPPLY CHAIN ARE CORE LIFE-SCIENCES MARKETS

The revised benchmark places process development, MES, advanced process control, quality intelligence, validation, supply planning, clinical supply, cold chain and chain of identity inside the same market framework as discovery and trials. This closes the coverage gap between scientific innovation and the regulated operating systems required to release and deliver a therapy.

06

HOW TO READ THE INTEGRATED CATEGORY PROFILES

The integrated edition combines Black Book client-rated scorecards with two additional market-intelligence lenses. Every category is treated in the same order and with the same distinction between measured client performance and contextual market evidence.

Black Book rankings remain the principal performance result. Dark-horse and startup/scaleup designations identify competitive momentum and category fit. Neither designation is converted into a Black Book score or performance award.

COVERAGE PRINCIPLE

A life-sciences technology benchmark is incomplete when it stops at discovery and clinical trials. Black Book measures the systems and services that govern evidence, safety, laboratories, manufacturing, quality, supply, medical engagement, commercial execution and enterprise governance as well.

TWO COMPETITIVE-INTELLIGENCE LENSES

#	Lens	Interpretation
1	Dark-horse challengers	Underrecognized competitors with credible specialist depth, deployment momentum or category-specific differentiation that could disrupt the current ranking order.
2	Startup & scaleup watchlist	Younger or specialist organizations whose product-market fit, scientific validation, production deployment and repeat-client evidence warrant continued monitoring.

07

DISCOVERY AND PRECLINICAL PERFORMANCE & MARKET INTELLIGENCE

Discovery and preclinical categories measure scientific validity, prospective validation, workflow acceleration, data and IP controls, partnership execution and documented reduction in design or research cycles.

EACH CATEGORY IS PRESENTED IN THE SAME SEQUENCE:

Defined scope and performance features, Black Book client-rated ranking, dark-horse challengers, startup/scaleup watchlist and market signal.

DOMAIN AT-A-GLANCE KEY SAMPLE

ID	Category / Black Book Leader	Featured Dark Horse	Startup / Scaleup To Watch
1	AI drug target discovery and pathway modeling #1 Insilico Medicine — 9.30	Aitia	Relation Therapeutics
2	Generative small-molecule design and optimization #1 Schrödinger — 9.32	Iktos	Phare Bio
3	AI protein, antibody and biologics design #1 Generate Biomedicines — 9.28	LabGenius	Cradle
4	Biomarker, multi-omics and precision-research intelligence #1 Tempus AI — 9.34	Seven Bridges	Ataraxis AI
5	Scientific literature, patent and knowledge mining #1 Clarivate Cortellis — 9.31	BenchSci	Causaly
6	Digital twins, biosimulation and in silico development #1 Certara — 9.36	QuantHealth	Quris-AI

Dark-horse and startup/scaleup watchlist placement are contextual intelligence. They do not replace, extend or constitute a Black Book client-performance award.

CATEGORY 1

DISCOVERY & PRECLINICAL | BLACK BOOK PERFORMANCE

AI DRUG TARGET DISCOVERY AND PATHWAY MODELING

CATEGORY SCOPE

Target identification, causal biology, disease networks, pathway prioritization and sponsor-partner execution.

CATEGORY PERFORMANCE FEATURES

TARGET IDENTIFICATION

CAUSAL BIOLOGY

DISEASE NETWORKS

PATHWAY PRIORITIZATION

SPONSOR-PARTNER EXECUTION

BLACK BOOK CLIENT-RATED VENDOR PERFORMANCE

Rank	Top-performing Vendor / Platform / Service	Black Book Score
1	Insilico Medicine	9.30
2	Recursion (including Exscientia)	9.04
3	Isomorphic Labs	8.78
4	BenevolentAI	8.43
5	Owkin	8.09
6	Aitia	7.82
7	Valo Health	7.54
8	Evotec	7.27
9	Deep Genomics	6.95
10	XtalPi	6.69

Scores represent the 2026 Black Book client and user evaluation for the defined category. Rankings and scores are product-, service- and market-specific and do not extend to unrelated offerings. Full 18 KPI competitive performance reports are available.

CATEGORY 1
DISCOVERY & PRECLINICAL | COMPETITIVE INTELLIGENCE

AI DRUG TARGET DISCOVERY AND PATHWAY MODELING

DARK-HORSE CHALLENGERS

Vendor	Why It Merits Dark-horse Monitoring
Aitia	Causal digital twins and mechanistic disease modeling create a differentiated bridge between patient data, target hypotheses and translational decisions.
Valo Health	Its integrated data-and-computation model can appeal to sponsors seeking a discovery partner rather than a stand-alone algorithm, but client visibility remains comparatively limited.
Deep Genomics	A focused RNA biology and machine-learning strategy gives it modality depth that broad discovery platforms may not match.

STARTUP & SCALEUP WATCHLIST

Company	Category Application And Watch Rationale
Relation Therapeutics	Combines human tissue biology, single-cell data and machine learning to identify and validate disease-relevant targets.
Immunai	Builds an immune-system data and analytics platform that could convert immune-state mapping into target and biomarker programs.
NetTargets	Applies network medicine and knowledge-graph methods to target discovery; watch prospective validation and repeat pharmaceutical use.

MARKET SIGNAL

The most credible challengers will show prospective biological validation, repeat sponsor programs and measurable reductions in target-selection cycle time—not only model novelty.

INTERPRETATION RULE: Dark-horse and startup/scaleup watchlist placement provide competitive context only. They do not replace, extend or constitute a Black Book client-performance award.

CATEGORY 2
DISCOVERY & PRECLINICAL | BLACK BOOK PERFORMANCE

GENERATIVE SMALL-MOLECULE DESIGN AND OPTIMIZATION

CATEGORY SCOPE

Molecular generation, virtual screening, medicinal chemistry optimization, ADMET prediction and design-make-test-learn acceleration.

CATEGORY PERFORMANCE FEATURES

MOLECULAR GENERATION

VIRTUAL SCREENING

MEDICINAL CHEMISTRY OPTIMIZATION

ADMET PREDICTION

DESIGN-MAKE-TEST-LEARN ACCELERATION

BLACK BOOK CLIENT-RATED VENDOR PERFORMANCE

Rank	Top-performing Vendor / Platform / Service	Black Book Score
1	Schrödinger	9.32
2	Insilico Medicine	9.08
3	Recursion	8.83
4	XtalPi	8.54
5	Iktos	8.24
6	Genesis Therapeutics	7.93
7	Cadence OpenEye	7.62
8	Atomwise	7.33
9	Cresset	7.06
10	Chemify	6.78

Scores represent the 2026 Black Book client and user evaluation for the defined category. Rankings and scores are product-, service- and market-specific and do not extend to unrelated offerings. Full 18 KPI competitive performance reports are available.

CATEGORY 2 DISCOVERY & PRECLINICAL | COMPETITIVE INTELLIGENCE

GENERATIVE SMALL-MOLECULE DESIGN AND OPTIMIZATION

DARK-HORSE CHALLENGERS

Vendor	Why It Merits Dark-horse Monitoring
Iktos	Integrated generative design, retrosynthesis and chemistry automation make it a strong specialist challenger for design-make-test-learn workflows.
Genesis Therapeutics	Graph-based molecular design and partnership-oriented deployment give it upside where sponsors need high-touch computational chemistry collaboration.
Chemify	A chemistry-first operating model linking digital design with automated synthesis could distinguish it from software-only platforms.

STARTUP & SCALEUP WATCHLIST

Company	Category Application And Watch Rationale
Phare Bio	Uses AI-guided discovery for antimicrobial programs; advancement into validated leads and licensed assets is the key scale test.
Serna Bio	Targets RNA structures with machine learning and small molecules, creating a differentiated chemistry opportunity beyond protein targets.
Leash Biosciences	Builds large experimental binding datasets and foundation models; prospective wet-lab hit rates will determine competitive standing.

MARKET SIGNAL

Buyers should separate attractive generated molecules from platforms that improve synthesis success, ADMET quality, medicinal-chemistry productivity and portfolio decisions.

INTERPRETATION RULE: Dark-horse and startup/scaleup watchlist placement provide competitive context only. They do not replace, extend or constitute a Black Book client-performance award.

CATEGORY 3

DISCOVERY & PRECLINICAL | BLACK BOOK PERFORMANCE

AI PROTEIN, ANTIBODY AND BIOLOGICS DESIGN

CATEGORY SCOPE

Protein engineering, antibody design, affinity and developability prediction, immunogenicity and multimodal biologics optimization.

CATEGORY PERFORMANCE FEATURES

PROTEIN ENGINEERING

ANTIBODY DESIGN

AFFINITY AND DEVELOPABILITY PREDICTION

IMMUNOGENICITY

MULTIMODAL BIOLOGICS OPTIMIZATION

BLACK BOOK CLIENT-RATED VENDOR PERFORMANCE

Rank	Top-performing Vendor / Platform / Service	Black Book Score
1	Generate Biomedicines	9.28
2	Absci	9.04
3	Xaira Therapeutics	8.79
4	Isomorphic Labs	8.52
5	LabGenius	8.21
6	Cradle	7.92
7	Profluent	7.63
8	Nabla Bio	7.34
9	BigHat Biosciences	7.05
10	Biologic Design	6.76

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CATEGORY 3
DISCOVERY & PRECLINICAL | COMPETITIVE INTELLIGENCE

AI PROTEIN, ANTIBODY AND BIOLOGICS DESIGN

DARK-HORSE CHALLENGERS

Vendor	Why It Merits Dark-horse Monitoring
LabGenius	Closed-loop experimental learning for antibody discovery offers stronger wet-lab integration than many design-only competitors.
BigHat Biosciences	Machine learning linked to high-throughput characterization can support developability and functional optimization, not merely binding prediction.
BioLogic Design	Multispecific antibody design and computational biology expertise provide a specialized position in complex biologics engineering.

STARTUP & SCALEUP WATCHLIST

Company	Category Application And Watch Rationale
Cradle	A collaborative generative protein-engineering environment lowers the barrier to iterative sequence design and experimental learning.
Profluent	Protein language models and AI-designed gene-editing systems could create high-value platform partnerships if experimental performance generalizes.
Nabla Bio	Structure-aware antibody design targets difficult membrane proteins; watch breadth across targets and partner-confirmed developability.

MARKET SIGNAL

The category will be won through experimentally confirmed function, developability and manufacturability—not sequence generation volume alone.

INTERPRETATION RULE: Dark-horse and startup/scaleup watchlist placement provide competitive context only. They do not replace, extend or constitute a Black Book client-performance award.

CATEGORY 4
DISCOVERY & PRECLINICAL | BLACK BOOK PERFORMANCE

BIOMARKER, MULTI-OMICS AND PRECISION-RESEARCH INTELLIGENCE

CATEGORY SCOPE

Genomic, transcriptomic, proteomic, imaging and clinical-data analysis for biomarker discovery and patient stratification.

CATEGORY PERFORMANCE FEATURES



BLACK BOOK CLIENT-RATED VENDOR PERFORMANCE

Rank	Top-performing Vendor / Platform / Service	Black Book Score
1	Tempus AI	9.34
2	SOPHiA GENETICS	9.09
3	DNAexus	8.84
4	Owkin	8.56
5	QIAGEN Digital Insights	8.25
6	PathAI	7.96
7	Illumina	7.67
8	Seven Bridges	7.39
9	ConcertAI	7.10
10	Flatiron Health	6.82

Scores represent the 2026 Black Book client and user evaluation for the defined category. Rankings and scores are product-, service- and market-specific and do not extend to unrelated offerings. Full 18 KPI competitive performance reports are available.

CATEGORY 4
DISCOVERY & PRECLINICAL | COMPETITIVE INTELLIGENCE

BIOMARKER, MULTI-OMICS AND PRECISION-RESEARCH INTELLIGENCE

DARK-HORSE CHALLENGERS

Vendor	Why It Merits Dark-horse Monitoring
Seven Bridges	Its governed bioinformatics environment can support reproducible multi-omics pipelines across distributed research teams.
ConcertAI	Oncology-focused multimodal data and evidence capabilities can connect biomarker work with trial and real-world research.
Flatiron Health	Deep oncology data and clinical abstraction create an underappreciated foundation for biomarker validation and stratification.

STARTUP & SCALEUP WATCHLIST

Company	Category Application And Watch Rationale
Ataraxis AI	Pathology foundation models for treatment-response prediction could expand from oncology diagnostics into biomarker-led development.
Transcripta Bio	A large transcriptomic perturbation atlas may support biomarker discovery, disease-gene association and response prediction.
Converge Bio	Multimodal biological modeling and generative methods position it for focused biomarker and translational-research partnerships.

MARKET SIGNAL

Winning platforms must connect multimodal signal discovery to analytically valid biomarkers, traceable cohorts and decisions that affect trial design or treatment selection.

INTERPRETATION RULE: Dark-horse and startup/scaleup watchlist placement provide competitive context only. They do not replace, extend or constitute a Black Book client-performance award.

CATEGORY 5
DISCOVERY & PRECLINICAL | BLACK BOOK PERFORMANCE

SCIENTIFIC LITERATURE, PATENT AND KNOWLEDGE MINING

CATEGORY SCOPE

NLP, semantic search, evidence synthesis, patent intelligence, competitive landscapes and scientific knowledge graphs.

CATEGORY PERFORMANCE FEATURES

NLP

SEMANTIC SEARCH

EVIDENCE SYNTHESIS

PATENT INTELLIGENCE

COMPETITIVE LANDSCAPES

SCIENTIFIC KNOWLEDGE GRAPHS

BLACK BOOK CLIENT-RATED VENDOR
PERFORMANCE

Rank	Top-performing Vendor / Platform / Service	Black Book Score
1	Clarivate Cortellis	9.31
2	Causaly	9.06
3	IQVIA Linguamatics	8.82
4	Elsevier SciBite	8.55
5	CAS SciFinder	8.27
6	Patsnap	7.98
7	Dimensions / Digital Science	7.68
8	BenchSci	7.40
9	Ontotext	7.11
10	expert.ai	6.83

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CATEGORY 5 DISCOVERY & PRECLINICAL | COMPETITIVE INTELLIGENCE

SCIENTIFIC LITERATURE, PATENT AND KNOWLEDGE MINING

DARK-HORSE CHALLENGERS

Vendor	Why It Merits Dark-horse Monitoring
BenchSci	Biological relationship mapping and experiment intelligence offer a practical route from literature and data to actionable preclinical decisions.
Patsnap	Patent, competitive and scientific intelligence can serve integrated R&D strategy teams that need more than literature search.
Ontotext	Semantic graphs and ontology-driven knowledge integration are well suited to governed enterprise scientific intelligence.

STARTUP & SCALEUP WATCHLIST

Company	Category Application And Watch Rationale
Causaly	Causal knowledge graphs and natural-language exploration can accelerate evidence synthesis across discovery and translational research.
Biorelate	Biomedical text mining and relationship extraction target high-volume evidence discovery for research and competitive intelligence.
Iris.ai	Research-document discovery and extraction tools may fit smaller teams seeking rapid evidence maps without a large informatics program.

MARKET SIGNAL

The decisive capability is not search relevance alone; it is traceable evidence synthesis that preserves provenance, resolves entities and supports defensible scientific conclusions.

INTERPRETATION RULE: Dark-horse and startup/scaleup watchlist placement provide competitive context only. They do not replace, extend or constitute a Black Book client-performance award.

CATEGORY 6
DISCOVERY & PRECLINICAL | BLACK BOOK PERFORMANCE

DIGITAL TWINS, BIOSIMULATION AND IN SILICO DEVELOPMENT

CATEGORY SCOPE

Quantitative systems pharmacology, virtual populations, disease progression, synthetic control and trial simulation.

CATEGORY PERFORMANCE FEATURES

QUANTITATIVE SYSTEMS
PHARMACOLOGY

VIRTUAL POPULATIONS

DISEASE PROGRESSION

SYNTHETIC CONTROL

TRIAL SIMULATION

BLACK BOOK CLIENT-RATED VENDOR
PERFORMANCE

Rank	Top-performing Vendor / Platform / Service	Black Book Score
1	Certara	9.36
2	Unlearn	9.12
3	Phesi	8.89
4	QuantHealth	8.53
5	Simulations Plus	8.19
6	Aitia	7.92
7	Dassault Systèmes / Medidata	7.66
8	InSilicoTrials	7.38
9	CytoReason	7.08
10	Rosa & Co.	6.76

Scores represent the 2026 Black Book client and user evaluation for the defined category. Rankings and scores are product-, service- and market-specific and do not extend to unrelated offerings. Full 18 KPI competitive performance reports are available.

CATEGORY 6
DISCOVERY & PRECLINICAL | COMPETITIVE INTELLIGENCE

DIGITAL TWINS, BIOSIMULATION AND IN SILICO DEVELOPMENT

DARK-HORSE CHALLENGERS

Vendor	Why It Merits Dark-horse Monitoring
QuantHealth	AI-based trial simulation and virtual populations offer a faster, software-oriented alternative to traditional modeling engagements.
InSilicoTrials	A marketplace and orchestration model for simulation tools can broaden access to in silico methods across development teams.
CytoReason	Human disease models built from multi-omics data provide a translational form of digital-twin intelligence for patient and mechanism stratification.

STARTUP & SCALEUP WATCHLIST

Company	Category Application And Watch Rationale
Quris-AI	Organ-on-chip data and machine learning target patient-response prediction and preclinical safety, with regulatory validation as the critical hurdle.
VeriSIM Life	Biosimulation and translational modeling aim to reduce animal use and improve candidate selection across preclinical development.
Pumas-AI	Cloud-based pharmacometrics and model-informed development tools could expand expert modeling into repeatable team workflows.

MARKET SIGNAL

Sponsors should demand context-of-use validation, uncertainty quantification and evidence that simulations changed development decisions rather than merely producing attractive visualizations.

INTERPRETATION RULE: Dark-horse and startup/scaleup watchlist placement provide competitive context only. They do not replace, extend or constitute a Black Book client-performance award.

08

CLINICAL DEVELOPMENT AND EVIDENCE PERFORMANCE & MARKET INTELLIGENCE

Clinical development and evidence categories measure protocol and feasibility performance, recruitment, eClinical execution, participant burden, data quality, trial oversight, evidence reproducibility and integration with sponsor and site workflows.

EACH CATEGORY IS PRESENTED IN THE SAME SEQUENCE:

Defined scope and performance features, Black Book client-rated ranking, dark-horse challengers, startup/scaleup watchlist and market signal.

DOMAIN AT-A-GLANCE KEY SAMPLE

ID	Category / Black Book Leader	Featured Dark Horse	Startup / Scaleup To Watch
7	Protocol design, feasibility and trial simulation #1 Medidata — 9.34	Lokavant	Faro Health
8	Trial site selection, recruitment and patient matching #1 Tempus AI / Deep 6 AI — 9.33	Trialbee	Ryght AI
9	eClinical and decentralized trial execution #1 Medidata — 9.36	Castor	Curebase
10	Clinical data review, RBQM and automated trial-quality intelligence #1 CluePoints — 9.35	Lokavant	Beaconcure
11	Digital biomarkers, connected devices and remote trial monitoring #1 ActiGraph — 9.32	Evidation	Koneksa
12	AI-enabled self-service RWE analytics and cohort intelligence #1 Veradigm — 9.29	Komodo Health	Atropos Health
13	RWD networks, linkage, tokenization and external controls #1 Datavant / Aetion — 9.37	TriNetX	Novellia
14	HEOR, market access, pricing and evidence strategy technology/services #1 IQVIA — 9.33	Avalere	Genesis Research

Dark-horse and startup/scaleup watchlist placement are contextual intelligence. They do not replace, extend or constitute a Black Book client-performance award.

CATEGORY 7
CLINICAL DEVELOPMENT | BLACK BOOK PERFORMANCE

PROTOCOL DESIGN, FEASIBILITY AND TRIAL SIMULATION

CATEGORY SCOPE

Protocol optimization, eligibility design, scenario testing, feasibility, country/site planning and enrollment forecasting.

CATEGORY PERFORMANCE FEATURES

PROTOCOL OPTIMIZATION

ELIGIBILITY DESIGN

SCENARIO TESTING

FEASIBILITY

COUNTRY/SITE PLANNING

ENROLLMENT FORECASTING

BLACK BOOK CLIENT-RATED VENDOR PERFORMANCE

Rank	Top-performing Vendor / Platform / Service	Black Book Score
1	Medidata	9.34
2	Phesi	9.09
3	IQVIA	8.84
4	TriNetX	8.57
5	Citeline / Norstellla	8.28
6	QuantHealth	7.98
7	Oracle Life Sciences	7.70
8	Tempus AI	7.42
9	Lokavant	7.14
10	Saama	6.86

Scores represent the 2026 Black Book client and user evaluation for the defined category. Rankings and scores are product-, service- and market-specific and do not extend to unrelated offerings. Full 18 KPI competitive performance reports are available.

CATEGORY 7
CLINICAL DEVELOPMENT | COMPETITIVE INTELLIGENCE

PROTOCOL DESIGN, FEASIBILITY AND TRIAL SIMULATION

DARK-HORSE CHALLENGERS

Vendor	Why It Merits Dark-horse Monitoring
Lokavant	Study intelligence and predictive operational analytics can improve protocol and execution decisions using cross-study performance data.
QuantHealth	Rapid simulation of trial scenarios may appeal to teams seeking earlier evidence on design risk and probability of success.
Saama	A broad clinical data foundation and agentic workflow strategy could connect protocol planning with downstream execution intelligence.

STARTUP & SCALEUP WATCHLIST

Company	Category Application And Watch Rationale
Faro Health	Structured protocol design and operational modeling target amendment risk, complexity and feasibility before study launch.
Cognivia	Behavioral and predictive analytics could improve protocol assumptions, placebo response planning and patient retention strategies.
TrialKey	Machine-learning estimates of trial success and design risk may support portfolio screening and early protocol decisions.

MARKET SIGNAL

Competitive advantage will come from demonstrating fewer amendments, more realistic eligibility, better country and site forecasts, and faster operationalization of protocol changes.

INTERPRETATION RULE: Dark-horse and startup/scaleup watchlist placement provide competitive context only. They do not replace, extend or constitute a Black Book client-performance award.

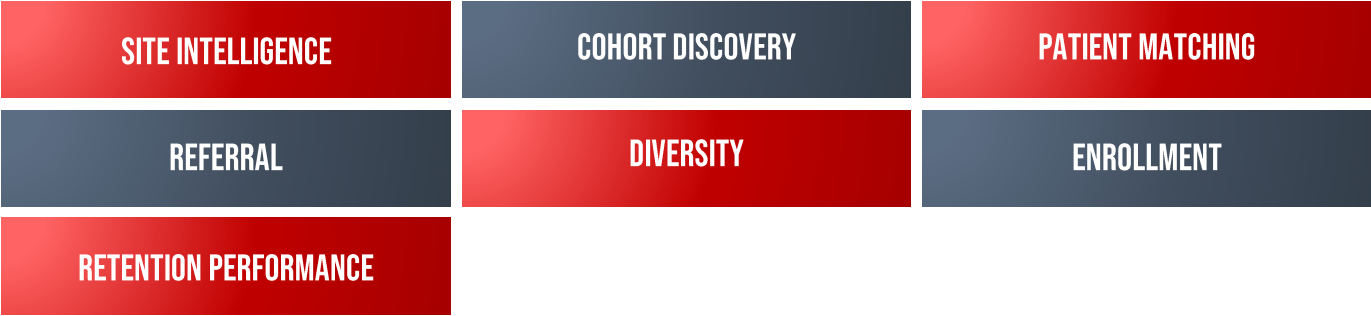
CATEGORY 8
CLINICAL DEVELOPMENT | BLACK BOOK PERFORMANCE

TRIAL SITE SELECTION, RECRUITMENT AND PATIENT MATCHING

CATEGORY SCOPE

Site intelligence, cohort discovery, patient matching, referral, diversity, enrollment and retention performance.

CATEGORY PERFORMANCE FEATURES



BLACK BOOK CLIENT-RATED VENDOR
PERFORMANCE

Rank	Top-performing Vendor / Platform / Service	Black Book Score
1	Tempus AI / Deep 6 AI	9.33
2	TriNetX	9.10
3	IQVIA	8.84
4	Medidata	8.49
5	Trialbee	8.16
6	Clariness (including SubjectWell)	7.88
7	Phesi	7.61
8	ConcertAI	7.34
9	Antidote	7.01
10	Oracle Life Sciences	6.72

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CATEGORY 7
CLINICAL DEVELOPMENT | COMPETITIVE INTELLIGENCE

TRIAL SITE SELECTION, RECRUITMENT AND PATIENT MATCHING

DARK-HORSE CHALLENGERS

Vendor	Why It Merits Dark-horse Monitoring
Trialbee	Patient recruitment technology and services provide a focused alternative to broad eClinical suites, especially for hard-to-reach populations.
Clariness including SubjectWell	Combined digital recruitment, site and patient-service capabilities create scale across awareness, referral and enrollment.
Antidote	Patient-centric matching and digital outreach remain differentiated for sponsors seeking direct-to-patient recruitment channels.

STARTUP & SCALEUP WATCHLIST

Company	Category Application And Watch Rationale
Ryght AI	Generative-AI study and site intelligence could improve feasibility research and accelerate identification of qualified investigators.
Trial Library	Community-based recruitment infrastructure targets representative enrollment and access for populations often missed by traditional channels.
Power	A patient-facing clinical-trial marketplace can reduce search friction and create a direct enrollment funnel for selected studies.

MARKET SIGNAL

The most valuable challengers will prove incremental enrollment, diversity, retention and site productivity after controlling for indication difficulty and sponsor media spend.

INTERPRETATION RULE: Dark-horse and startup/scaleup watchlist placement provide competitive context only. They do not replace, extend or constitute a Black Book client-performance award.

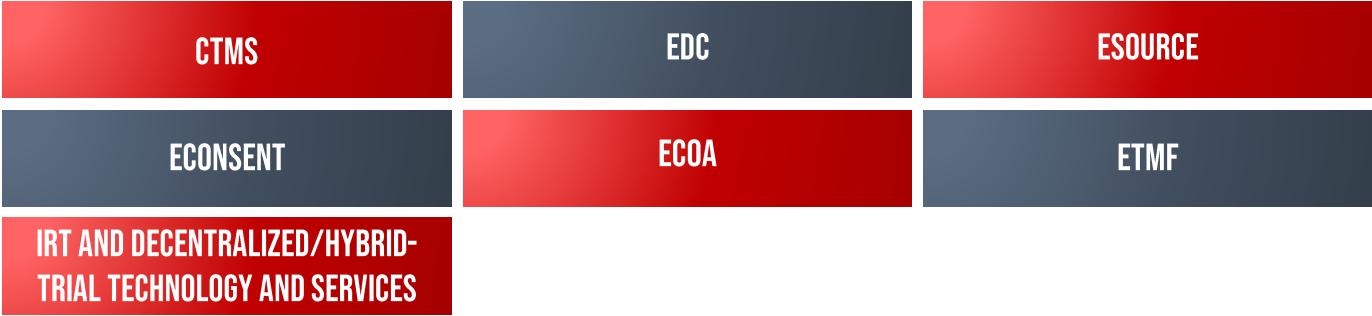
CATEGORY 9
CLINICAL DEVELOPMENT | BLACK BOOK PERFORMANCE

ECLINICAL AND DECENTRALIZED TRIAL EXECUTION

CATEGORY SCOPE

CTMS, EDC, eSource, eConsent, eCOA, eTMF, IRT and decentralized/hybrid-trial technology and services.

CATEGORY PERFORMANCE FEATURES



BLACK BOOK CLIENT-RATED VENDOR PERFORMANCE

Rank	Top-performing Vendor / Platform / Service	Black Book Score
1	Medidata	9.36
2	Veeva	9.14
3	Oracle Clinical One	8.89
4	Medable	8.61
5	Signant Health	8.33
6	Clario	8.04
7	IQVIA	7.76
8	Castor	7.47
9	Medrio	7.19
10	EvidentIQ (Clindex)	6.90

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CATEGORY 9

CLINICAL DEVELOPMENT | COMPETITIVE INTELLIGENCE

ECLINICAL AND DECENTRALIZED TRIAL EXECUTION

DARK-HORSE CHALLENGERS

Vendor	Why It Merits Dark-horse Monitoring
Castor	Flexible cloud EDC and decentralized-study capabilities can serve midmarket sponsors that find enterprise suites too complex or costly.
Medrio	Integrated EDC, eConsent and ePRO tools give emerging biopharma and device sponsors a focused alternative with faster deployment.
EvidentIQ including Clindex	A modular eClinical platform and services model can appeal to smaller sponsors and CROs seeking configurable execution support.

STARTUP & SCALEUP WATCHLIST

Company	Category Application And Watch Rationale
Curebase	Site-less and hybrid-trial operations target community-based research and participant-centered execution.
Jeeva Clinical Trials	A unified digital trial platform aims to simplify remote participation for smaller research teams and diverse populations.
Lindus Health	A technology-enabled CRO model combines software and execution, making it a scaleup to watch for end-to-end trial delivery.

MARKET SIGNAL

Buyers should compare configuration burden, data reconciliation, site usability, participant completion and total study operating cost—not feature counts alone.

INTERPRETATION RULE: Dark-horse and startup/scaleup watchlist placement provide competitive context only. They do not replace, extend or constitute a Black Book client-performance award.

CATEGORY 10
CLINICAL DEVELOPMENT | BLACK BOOK PERFORMANCE

CLINICAL DATA REVIEW, RBQM AND AUTOMATED TRIAL-QUALITY INTELLIGENCE

CATEGORY SCOPE

Central monitoring, anomaly detection, risk-based quality management, data review, query management and quality signals.

CATEGORY PERFORMANCE FEATURES

CENTRAL MONITORING

ANOMALY DETECTION

RISK-BASED QUALITY MANAGEMENT

DATA REVIEW

QUERY MANAGEMENT

QUALITY SIGNALS

BLACK BOOK CLIENT-RATED VENDOR
PERFORMANCE

Rank	Top-performing Vendor / Platform / Service	Black Book Score
1	CluePoints	9.35
2	Saama	9.07
3	Medidata	8.83
4	eClinical Solutions	8.50
5	Oracle Life Sciences	8.18
6	Veeva	7.90
7	Lokavant	7.63
8	Signant Health	7.31
9	Merative (Zelta)	7.03
10	Medrio	6.74

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CATEGORY 10
CLINICAL DEVELOPMENT | COMPETITIVE INTELLIGENCE

CLINICAL DATA REVIEW, RBQM AND AUTOMATED TRIAL-QUALITY INTELLIGENCE

DARK-HORSE CHALLENGERS

Vendor	Why It Merits Dark-horse Monitoring
Lokavant	Operational risk prediction and study intelligence can complement traditional RBQM by identifying execution problems earlier.
Signant Health	Broad endpoint, data-quality and trial-technology experience gives it an underrecognized position in integrated quality oversight.
Zelta by Merative	Clinical data management and migration capabilities support its challenger position in complex trial-data operations.

STARTUP & SCALEUP WATCHLIST

Company	Category Application And Watch Rationale
Beaconcure	Automated statistical review of clinical outputs targets a high-risk quality-control bottleneck near submission.
Nurocor	Clinical data standards and metadata automation could reduce mapping, reconciliation and submission-readiness effort.
Yonalink	Direct EHR-to-EDC data transfer can reduce transcription burden and improve source-data timeliness for selected studies.

MARKET SIGNAL

Dark-horse momentum depends on documented reductions in review effort, query volume and late-stage data surprises while maintaining explainable human oversight.

INTERPRETATION RULE: Dark-horse and startup/scaleup watchlist placement provide competitive context only. They do not replace, extend or constitute a Black Book client-performance award.

CATEGORY 11
CLINICAL DEVELOPMENT | BLACK BOOK PERFORMANCE

DIGITAL BIOMARKERS, CONNECTED DEVICES AND REMOTE TRIAL MONITORING

CATEGORY SCOPE

Wearables, sensors, digital endpoints, remote measurement, participant adherence and regulatory-grade signal processing.

CATEGORY PERFORMANCE FEATURES

WEARABLES

SENSORS

DIGITAL ENDPOINTS

REMOTE MEASUREMENT

PARTICIPANT ADHERENCE

REGULATORY-GRADE SIGNAL PROCESSING

BLACK BOOK CLIENT-RATED VENDOR PERFORMANCE

Rank	Top-performing Vendor / Platform / Service	Black Book Score
1	ActiGraph	9.32
2	Koneksa	9.08
3	Empatica	8.82
4	Medable	8.55
5	Clario	8.27
6	Evidation	7.99
7	Medidata Sensor Cloud	7.71
8	VivoSense	7.43
9	physIQ	7.15
10	IXICO	6.87

Scores represent the 2026 Black Book client and user evaluation for the defined category. Rankings and scores are product-, service- and market-specific and do not extend to unrelated offerings. Full 18 KPI competitive performance reports are available.

CATEGORY 11

CLINICAL DEVELOPMENT | COMPETITIVE INTELLIGENCE

DIGITAL BIOMARKERS, CONNECTED DEVICES AND REMOTE TRIAL MONITORING

DARK-HORSE CHALLENGERS

Vendor	Why It Merits Dark-horse Monitoring
Evidation	Direct-to-participant data collection and longitudinal research capabilities connect digital measures with broader real-world evidence programs.
VivoSense	Digital biomarker development and analytics services can help sponsors convert sensor streams into fit-for-purpose endpoints.
physIQ	Continuous physiologic analytics and remote monitoring provide a differentiated signal-processing layer for complex patient populations.

STARTUP & SCALEUP WATCHLIST

Company	Category Application And Watch Rationale
Koneksa	Digital-measure development, device integration and evidence services make it a scaleup to watch for regulated endpoints.
Empatica	Medical-grade wearables and validated physiological sensing offer strong foundations for decentralized and digital-biomarker studies.
Aural Analytics	Speech-based digital biomarkers target neurological and psychiatric measurement where passive, repeatable assessment has high value.

MARKET SIGNAL

The market will reward platforms that show measurement validity, participant adherence, device interoperability and regulatory acceptance across multiple studies and populations.

INTERPRETATION RULE: Dark-horse and startup/scaleup watchlist placement provide competitive context only. They do not replace, extend or constitute a Black Book client-performance award.

CATEGORY 12
EVIDENCE & MARKET ACCESS | BLACK BOOK PERFORMANCE

AI-ENABLED SELF-SERVICE RWE ANALYTICS AND COHORT INTELLIGENCE

CATEGORY SCOPE

Cohort construction, phenotyping, NLP extraction, comparative analysis, reproducibility and user-directed evidence generation.

CATEGORY PERFORMANCE FEATURES

COHORT CONSTRUCTION

PHENOTYPING

NLP EXTRACTION

COMPARATIVE ANALYSIS

REPRODUCIBILITY

USER-DIRECTED EVIDENCE GENERATION

BLACK BOOK CLIENT-RATED VENDOR PERFORMANCE

Rank	Top-performing Vendor / Platform / Service	Black Book Score
1	Veradigm	9.29
2	Datavant / Aetion	9.06
3	HealthVerity	8.80
4	IQVIA	8.55
5	TriNetX	8.23
6	Komodo Health	7.96
7	Oracle Life Sciences	7.67
8	Optum Life Sciences	7.39
9	ConcertAI	7.12
10	Flatiron Health	6.85

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CATEGORY 12
EVIDENCE & MARKET ACCESS | COMPETITIVE INTELLIGENCE

AI-ENABLED SELF-SERVICE RWE ANALYTICS AND COHORT INTELLIGENCE

DARK-HORSE CHALLENGERS

Vendor	Why It Merits Dark-horse Monitoring
Komodo Health	A large healthcare map and analytics environment can support cohort exploration and evidence workflows beyond its better-known commercial use cases.
ConcertAI	Oncology-specific data, abstraction and research services create depth for specialty RWE and clinical-development questions.
Flatiron Health	Curated oncology datasets and evidence-generation expertise remain highly differentiated for disease-specific self-service and managed research.

STARTUP & SCALEUP WATCHLIST

Company	Category Application And Watch Rationale
Atropos Health	Rapid evidence generation and federated data access target the gap between clinical questions and reproducible observational analysis.
PicnicHealth	Patient-centered longitudinal record collection can create differentiated cohorts and outcomes data for rare and complex conditions.
LynxCare	Clinical-data extraction and research infrastructure offer a pathway from health-system records to governed RWE cohorts.

MARKET SIGNAL

Self-service claims must be tested against reproducibility, transparent cohort logic, confounding control and the ability of nonprogrammers to generate decision-grade evidence.

INTERPRETATION RULE: Dark-horse and startup/scaleup watchlist placement provide competitive context only. They do not replace, extend or constitute a Black Book client-performance award.

CATEGORY 13

EVIDENCE & MARKET ACCESS | BLACK BOOK PERFORMANCE

RWD NETWORKS, LINKAGE, TOKENIZATION AND EXTERNAL CONTROLS

CATEGORY SCOPE

Data networks, privacy-preserving linkage, tokenization, provenance, external comparators and regulatory-grade evidence assets.

CATEGORY PERFORMANCE FEATURES

DATA NETWORKS

PRIVACY-PRESERVING LINKAGE

TOKENIZATION

PROVENANCE

EXTERNAL COMPARATORS

REGULATORY-GRADE EVIDENCE ASSETS

BLACK BOOK CLIENT-RATED VENDOR PERFORMANCE

Rank	Top-performing Vendor / Platform / Service	Black Book Score
1	Datavant / Aetion	9.37
2	IQVIA	9.14
3	HealthVerity	8.86
4	Flatiron Health	8.57
5	ConcertAI	8.24
6	Optum Life Sciences	7.98
7	TriNetX	7.70
8	Veradigm	7.43
9	Komodo Health	7.15
10	Oracle Life Sciences	6.81

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CATEGORY 13

EVIDENCE & MARKET ACCESS | COMPETITIVE INTELLIGENCE

RWD NETWORKS, LINKAGE, TOKENIZATION AND EXTERNAL CONTROLS

DARK-HORSE CHALLENGERS

Vendor	Why It Merits Dark-horse Monitoring
TriNetX	Its federated network and cohort tools can support external comparators and linked research without moving all source data centrally.
Veradigm	A large ambulatory EHR footprint and research services create useful linkage and longitudinal-data potential beyond analytics alone.
Komodo Health	Broad claims and clinical-linkage capabilities can support patient journeys and comparator construction across fragmented sources.

STARTUP & SCALEUP WATCHLIST

Company	Category Application And Watch Rationale
Novellia	Patient-authorized data access and repository technology can create differentiated longitudinal datasets for research and development.
PurpleLab	Claims-based analytics and data products provide an accessible route to cohort discovery and market intelligence.
Truveta	Health-system-governed data at scale may become a major source for linked, clinically rich RWD and external controls.

MARKET SIGNAL

The diligence priority is verifiable provenance, match quality, consent or authorization controls, refresh speed and fitness of linked data for the intended regulatory question.

INTERPRETATION RULE: Dark-horse and startup/scaleup watchlist placement provide competitive context only. They do not replace, extend or constitute a Black Book client-performance award.

CATEGORY 14
EVIDENCE & MARKET ACCESS | BLACK BOOK PERFORMANCE

HEOR, MARKET ACCESS, PRICING AND EVIDENCE STRATEGY TECHNOLOGY/SERVICES

CATEGORY SCOPE

Economic modeling, outcomes research, value dossiers, pricing, reimbursement, payer evidence and evidence strategy services.

CATEGORY PERFORMANCE FEATURES



BLACK BOOK CLIENT-RATED VENDOR PERFORMANCE

Rank	Top-performing Vendor / Platform / Service	Black Book Score
1	IQVIA	9.33
2	Clarivate	9.08
3	Cytel	8.83
4	EVERSANA	8.57
5	Certara	8.29
6	Avalere	8.02
7	Trinity Life Sciences	7.74
8	ZS	7.46
9	OPEN Health	7.18
10	Putnam	6.90

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CATEGORY 14

EVIDENCE & MARKET ACCESS | COMPETITIVE INTELLIGENCE

HEOR, MARKET ACCESS, PRICING AND EVIDENCE STRATEGY TECHNOLOGY/SERVICES

DARK-HORSE CHALLENGERS

Vendor	Why It Merits Dark-horse Monitoring
Avalere	Policy, payer and evidence expertise can translate analytics into reimbursement and access decisions rather than isolated HEOR outputs.
Trinity Life Sciences	Integrated strategy, analytics and commercialization services create continuity from evidence planning through launch and access.
Putnam	A focused life-sciences advisory model supports complex pricing, access and evidence decisions with less platform dependency.

STARTUP & SCALEUP WATCHLIST

Company	Category Application And Watch Rationale
Genesis Research	Technology-enabled RWE and HEOR services target faster evidence planning, analysis and communication.
Petauri Evidence	A specialist evidence and value organization can challenge larger firms through focused scientific and market-access execution.
Partners4Access	Rare-disease and specialty market-access expertise makes it a targeted watchlist firm for complex reimbursement environments.

MARKET SIGNAL

Category leaders must connect modeling and analytics to payer acceptance, dossier quality, pricing decisions and measurable access outcomes across markets.

INTERPRETATION RULE: Dark-horse and startup/scaleup watchlist placement provide competitive context only. They do not replace, extend or constitute a Black Book client-performance award.

09

SAFETY, REGULATORY, DATA AND DIAGNOSTICS PERFORMANCE & MARKET INTELLIGENCE

These markets measure safety and regulatory operations, AI-ready data foundations, genomics, pathology, imaging and scientific-data environments. Product-level lineage, validation, explainability and service execution are critical differentiators.

EACH CATEGORY IS PRESENTED IN THE SAME SEQUENCE:

Defined scope and performance features, Black Book client-rated ranking, dark-horse challengers, startup/scaleup watchlist and market signal.

DOMAIN AT-A-GLANCE KEY SAMPLE

ID	Category / Black Book Leader	Featured Dark Horse	Startup / Scaleup To Watch
15	Pharmacovigilance and safety-signal intelligence #1 ArisGlobal — 9.32	RxLogix	Quantum PV
16	Regulatory intelligence, RIM and submission-content automation #1 Veeva — 9.34	Yseop	RegASK
17	AI-ready clinical and translational data operating platforms #1 InterSystems IRIS for Health / HealthShare — 9.34	Health Catalyst Ignite	CognomiQ
18	Genomics, bioinformatics and precision-medicine workflow platforms #1 DNAexus — 9.35	Fabric Genomics	Nostos Genomics
19	Digital pathology, imaging AI and companion-diagnostic development #1 PathAI — 9.34	Aiforia	Proscia
20	Laboratory informatics, scientific data and autonomous-lab enablement #1 Siemens (including Dotmatics) — 9.34	LabVantage	Artificial

Dark-horse and startup/scaleup watchlist placement are contextual intelligence. They do not replace, extend or constitute a Black Book client-performance award.

CATEGORY 15
SAFETY & REGULATORY | BLACK BOOK PERFORMANCE

PHARMACOVIGILANCE AND SAFETY-SIGNAL INTELLIGENCE

CATEGORY SCOPE

Case intake, duplicate detection, coding, narratives, aggregate reporting, literature surveillance and signal management.

CATEGORY PERFORMANCE FEATURES

CASE INTAKE

Duplicate Detection

CODING

NARRATIVES

AGGREGATE REPORTING

LITERATURE SURVEILLANCE

SIGNAL MANAGEMENT

BLACK BOOK CLIENT-RATED VENDOR
PERFORMANCE

Rank	Top-performing Vendor / Platform / Service	Black Book Score
1	ArisGlobal	9.32
2	Oracle Life Sciences	9.09
3	Veeva	8.81
4	IQVIA	8.46
5	RxLogix	8.12
6	Ennov	7.84
7	EXTEDO	7.57
8	AB Cube	7.28
9	Navitas Life Sciences	7.00
10	Indegene	6.73

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CATEGORY 15
SAFETY & REGULATORY | COMPETITIVE INTELLIGENCE

PHARMACOVIGILANCE AND SAFETY-SIGNAL INTELLIGENCE

DARK-HORSE CHALLENGERS

Vendor	Why It Merits Dark-horse Monitoring
RxLogix	Modern safety analytics, signal management and automation create a credible alternative to the largest end-to-end safety suites.
Ennov	Integrated safety, regulatory and quality applications can appeal to midmarket life-sciences organizations seeking a unified platform.
AB Cube	A focused pharmacovigilance platform and services model offers flexibility for regional and specialty sponsors.

STARTUP & SCALEUP WATCHLIST

Company	Category Application And Watch Rationale
Quantum PV	AI-supported safety operations target case intake, quality control and signal workflows for teams constrained by manual effort.
SafetySignal AI	A specialist focus on safety signal detection and prioritization could improve surveillance speed for smaller organizations.
TheraLyze.ai	Automation of literature and safety review offers a narrow entry point into pharmacovigilance modernization.

MARKET SIGNAL

Buyers should require measurable case-processing accuracy, coding quality, signal timeliness, auditability and controlled human review before accepting automation claims.

INTERPRETATION RULE: Dark-horse and startup/scaleup watchlist placement provide competitive context only. They do not replace, extend or constitute a Black Book client-performance award.

CATEGORY 16
SAFETY & REGULATORY | BLACK BOOK PERFORMANCE

REGULATORY INTELLIGENCE, RIM AND SUBMISSION-CONTENT AUTOMATION

CATEGORY SCOPE

Regulatory information management, publishing, authoring, content reuse, health-authority intelligence and submission operations.

CATEGORY PERFORMANCE FEATURES

REGULATORY INFORMATION
MANAGEMENT

PUBLISHING

AUTHORING

CONTENT REUSE

HEALTH-AUTHORITY INTELLIGENCE

SUBMISSION OPERATIONS

BLACK BOOK CLIENT-RATED VENDOR
PERFORMANCE

Rank	Top-performing Vendor / Platform / Service	Black Book Score
1	Veeva	9.34
2	Clarivate Cortellis	9.05
3	Yseop	8.77
4	Ennov	8.45
5	Generis	8.13
6	ArisGlobal	7.87
7	EXTEDO	7.55
8	LORENZ	7.26
9	Instem	6.98
10	IQVIA	6.70

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CATEGORY 16
SAFETY & REGULATORY | COMPETITIVE INTELLIGENCE

REGULATORY INTELLIGENCE, RIM AND SUBMISSION-CONTENT AUTOMATION

DARK-HORSE CHALLENGERS

Vendor	Why It Merits Dark-horse Monitoring
Yseop	Purpose-built natural-language generation for regulated documents gives it stronger domain fit than general enterprise writing tools.
Generis	A configurable RIM platform and content model can serve sponsors seeking flexibility across regulatory information and submission operations.
LORENZ	Longstanding publishing and submission-management depth remains relevant for organizations prioritizing operational reliability and regional coverage.

STARTUP & SCALEUP WATCHLIST

Company	Category Application And Watch Rationale
RegASK	AI-enabled regulatory intelligence and workflow support target faster horizon scanning and market-specific decision-making.
Weave Bio	Structured data and automated authoring aim to make regulatory submissions more reusable, traceable and machine-assisted.
Asthra AI	A focused regulatory-writing assistant may appeal to emerging biopharma teams needing controlled document acceleration.

MARKET SIGNAL

The strongest challengers will combine content automation with source traceability, controlled terminology, review workflows and validated submission operations.

INTERPRETATION RULE: Dark-horse and startup/scaleup watchlist placement provide competitive context only. They do not replace, extend or constitute a Black Book client-performance award.

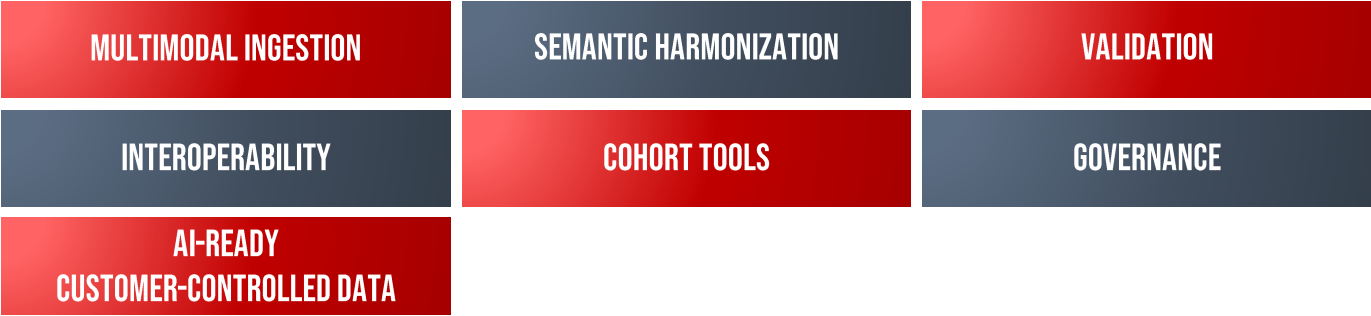
CATEGORY 17
DATA FOUNDATION | BLACK BOOK PERFORMANCE

AI-READY CLINICAL AND TRANSLATIONAL DATA OPERATING PLATFORMS

CATEGORY SCOPE

Multimodal ingestion, semantic harmonization, validation, interoperability, cohort tools, governance and AI-ready customer-controlled data.

CATEGORY PERFORMANCE FEATURES



BLACK BOOK CLIENT-RATED VENDOR
PERFORMANCE

Rank	Top-performing Vendor / Platform / Service	Black Book Score
1	InterSystems IRIS for Health / HealthShare	9.34
2	Oracle Health / Life Sciences AI Data Platform	9.10
3	Health Catalyst Ignite	8.82
4	Innovaccer Gravity	8.58
5	Palantir Foundry / AIP	8.35
6	CognomiQ	8.14
7	DNAxexus Precision Health Data Cloud	7.89
8	SOPHiA DDM Multimodal	7.64
9	Databricks Data Intelligence Platform	7.38
10	Snowflake AI Data Cloud	7.12

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CATEGORY 17
DATA FOUNDATION | COMPETITIVE INTELLIGENCE

AI-READY CLINICAL AND TRANSLATIONAL DATA OPERATING PLATFORMS

DARK-HORSE CHALLENGERS

Vendor	Why It Merits Dark-horse Monitoring
Health Catalyst Ignite	Healthcare-specific data models, analytics and governance provide a practical bridge from operational data to research-ready assets.
Palantir Foundry / AIP	Strong ontology, integration and controlled AI deployment capabilities can support complex translational-data programs.
SOPHiA DDM Multimodal	A clinically oriented multimodal environment can connect genomics and phenotypic data for precision-research workflows.

STARTUP & SCALEUP WATCHLIST

Company	Category Application And Watch Rationale
CognomiIQ	Semantic harmonization, cross-source validation and AI-ready clinical data operations make it a category-specific specialist to monitor.
Mendel AI	Clinical natural-language processing and research intelligence can convert fragmented records into structured, queryable evidence.
LynxCare	Health-system data extraction and research infrastructure provide a focused path to governed clinical and translational datasets.

MARKET SIGNAL

Category performance turns on data quality, semantic consistency, lineage, customer control, multimodal interoperability and time required to create usable cohorts.

INTERPRETATION RULE: Dark-horse and startup/scaleup watchlist placement provide competitive context only. They do not replace, extend or constitute a Black Book client-performance award.

CATEGORY 18

DATA & DIAGNOSTICS | BLACK BOOK PERFORMANCE

GENOMICS, BIOINFORMATICS AND PRECISION-MEDICINE WORKFLOW PLATFORMS

CATEGORY SCOPE

Genomic analysis, variant interpretation, multi-omics workflows, secure collaboration and clinical/translational bioinformatics.

CATEGORY PERFORMANCE FEATURES

GENOMIC ANALYSIS

VARIANT INTERPRETATION

MULTI-OMICS WORKFLOWS

SECURE COLLABORATION

CLINICAL/TRANSLATIONAL BIOINFORMATICS

BLACK BOOK CLIENT-RATED VENDOR PERFORMANCE

Rank	Top-performing Vendor / Platform / Service	Black Book Score
1	DNAexus	9.35
2	Illumina Connected Analytics	9.10
3	QIAGEN Digital Insights	8.84
4	Seven Bridges	8.58
5	SOPHiA DDM	8.31
6	Fabric Genomics	8.04
7	Lifebit	7.75
8	Velsera	7.48
9	Golden Helix	7.20
10	Saphetor VarSome	6.92

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CATEGORY 18
DATA & DIAGNOSTICS | COMPETITIVE INTELLIGENCE

GENOMICS, BIOINFORMATICS AND PRECISION-MEDICINE WORKFLOW PLATFORMS

DARK-HORSE CHALLENGERS

Vendor	Why It Merits Dark-horse Monitoring
Fabric Genomics	Automated interpretation and clinical decision support provide a focused precision-medicine alternative to broad omics platforms.
Lifebit	Federated analysis and secure data collaboration are differentiated where genomic data cannot be centralized.
Saphetor VarSome	Accessible variant knowledge and interpretation workflows can serve laboratories and distributed clinical-genomics teams.

STARTUP & SCALEUP WATCHLIST

Company	Category Application And Watch Rationale
Nostos Genomics	AI-assisted variant interpretation targets faster diagnosis and lower manual review burden for rare-disease workflows.
Velsera	Integrated clinical genomics, data and workflow capabilities position the scaleup for multi-institution precision-medicine programs.
Lifebit	A federated architecture and national-scale data programs make it a private scaleup to watch in secure research collaboration.

MARKET SIGNAL

The buyer test is end-to-end workflow performance: ingestion, quality control, interpretation, collaboration, reporting and reproducibility under clinical and research governance.

INTERPRETATION RULE: Dark-horse and startup/scaleup watchlist placement provide competitive context only. They do not replace, extend or constitute a Black Book client-performance award.

CATEGORY 19

DATA & DIAGNOSTICS | BLACK BOOK PERFORMANCE

DIGITAL PATHOLOGY, IMAGING AI AND COMPANION-DIAGNOSTIC DEVELOPMENT

CATEGORY SCOPE

Pathology and imaging workflow AI, quantitative biomarkers, companion diagnostics, validation and clinical-research integration.

CATEGORY PERFORMANCE FEATURES

PATHOLOGY AND IMAGING
WORKFLOW AI

QUANTITATIVE BIOMARKERS

COMPANION DIAGNOSTICS

VALIDATION

CLINICAL-RESEARCH INTEGRATION

BLACK BOOK CLIENT-RATED VENDOR
PERFORMANCE

Rank	Top-performing Vendor / Platform / Service	Black Book Score
1	PathAI	9.34
2	Paige	9.08
3	Proscia	8.83
4	Tempus AI	8.55
5	Aiforia	8.28
6	Ibex Medical Analytics	8.00
7	Visiopharm	7.73
8	Lunit	7.45
9	Deep Bio	7.17
10	Sectra	6.89

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CATEGORY 19
DATA & DIAGNOSTICS | COMPETITIVE INTELLIGENCE

DIGITAL PATHOLOGY, IMAGING AI AND COMPANION-DIAGNOSTIC DEVELOPMENT

DARK-HORSE CHALLENGERS

Vendor	Why It Merits Dark-horse Monitoring
Aiforia	Cloud-native image analysis and configurable models can appeal to pathology organizations seeking faster deployment across research applications.
Lunit	Strong imaging-AI heritage and oncology focus create potential across radiology-pathology convergence and companion-diagnostic research.
Visiopharm	Quantitative digital pathology and image-analysis depth remain valuable for translational research and biomarker development.

STARTUP & SCALEUP WATCHLIST

Company	Category Application And Watch Rationale
Proscia	A scaled digital-pathology platform with growing AI applications remains a private-company benchmark for workflow adoption.
Paige	Foundation models and pathology applications position it for research, diagnostic and biomarker partnerships.
Ibex Medical Analytics	Clinical-grade pathology AI and deployment experience create potential for translational and companion-diagnostic expansion.

MARKET SIGNAL

Success requires pathology workflow integration, generalizable model performance, validation across scanners and sites, and evidence that quantitative features support development decisions.

INTERPRETATION RULE: Dark-horse and startup/scaleup watchlist placement provide competitive context only. They do not replace, extend or constitute a Black Book client-performance award.

CATEGORY 20
LABORATORY & SCIENCE | BLACK BOOK PERFORMANCE

LABORATORY INFORMATICS, SCIENTIFIC DATA AND AUTONOMOUS-LAB ENABLEMENT

CATEGORY SCOPE

LIMS, ELN, SDMS, instrument integration, scientific data clouds, lab automation and experiment orchestration.

CATEGORY PERFORMANCE FEATURES



BLACK BOOK CLIENT-RATED VENDOR
PERFORMANCE

Rank	Top-performing Vendor / Platform / Service	Black Book Score
1	Siemens (including Dotmatics)	9.34
2	Benchling	9.08
3	TetraScience	8.82
4	Revvity Signals	8.48
5	Thermo Fisher Scientific	8.17
6	LabVantage	7.86
7	LabWare	7.59
8	Sapio Sciences	7.30
9	Synthace	7.01
10	Strateos	6.75

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CATEGORY 20

LABORATORY & SCIENCE | COMPETITIVE INTELLIGENCE

LABORATORY INFORMATICS, SCIENTIFIC DATA AND AUTONOMOUS-LAB ENABLEMENT

DARK-HORSE CHALLENGERS

Vendor	Why It Merits Dark-horse Monitoring
LabVantage	Broad LIMS and laboratory workflow capabilities give it a credible platform position beyond traditional sample management.
Sapio Sciences	A unified LIMS, ELN and scientific data cloud with embedded AI can challenge larger laboratory informatics portfolios.
Strateos	Remote and automated laboratory execution offers a differentiated model for experiment orchestration and reproducible physical workflows.

STARTUP & SCALEUP WATCHLIST

Company	Category Application And Watch Rationale
Artificial	A laboratory automation orchestration layer can connect instruments, workflows and data without replacing every system of record.
Synthace	Experiment design and automation software targets complex biological workflows and transferable laboratory methods.
TetraScience	A scientific data cloud and integration network make it a scaleup to watch as laboratories prepare data for AI and automation.

MARKET SIGNAL

The market is moving from isolated ELN and LIMS functions toward connected scientific data, instrument integration, automation and governed AI-ready laboratory operations.

INTERPRETATION RULE: Dark-horse and startup/scaleup watchlist placement provide competitive context only. They do not replace, extend or constitute a Black Book client-performance award.

10

MANUFACTURING, QUALITY AND SUPPLY CHAIN PERFORMANCE & MARKET INTELLIGENCE

These scorecards evaluate the regulated operating systems that translate development knowledge into reliable production, quality release, inventory availability, cold-chain control and patient-level traceability.

EACH CATEGORY IS PRESENTED IN THE SAME SEQUENCE:

Defined scope and performance features, Black Book client-rated ranking, dark-horse challengers, startup/scaleup watchlist and market signal.

DOMAIN AT-A-GLANCE KEY SAMPLE

ID	Category / Black Book Leader	Featured Dark Horse	Startup / Scaleup To Watch
21	Process development, formulation, scale-up and technology transfer #1 Siemens — 9.33	Sartorius	Aizon
22	GxP smart manufacturing, MES, digital twins and advanced process control #1 Siemens — 9.39	AspenTech	Apprentice
23	Predictive quality, deviations, CAPA, batch review and validation intelligence #1 Veeva — 9.35	ValGenesis	Dot Compliance
24A	Supply planning, demand forecasting, inventory and resilience #1 Kinaxis — 9.36	TraceLink	Aera Technology
24B	Clinical supply, cold chain, serialization and chain-of-identity intelligence #1 Controlant — 9.31	Sensitech	SkyCell

Dark-horse and startup/scaleup watchlist placement are contextual intelligence. They do not replace, extend or constitute a Black Book client-performance award.

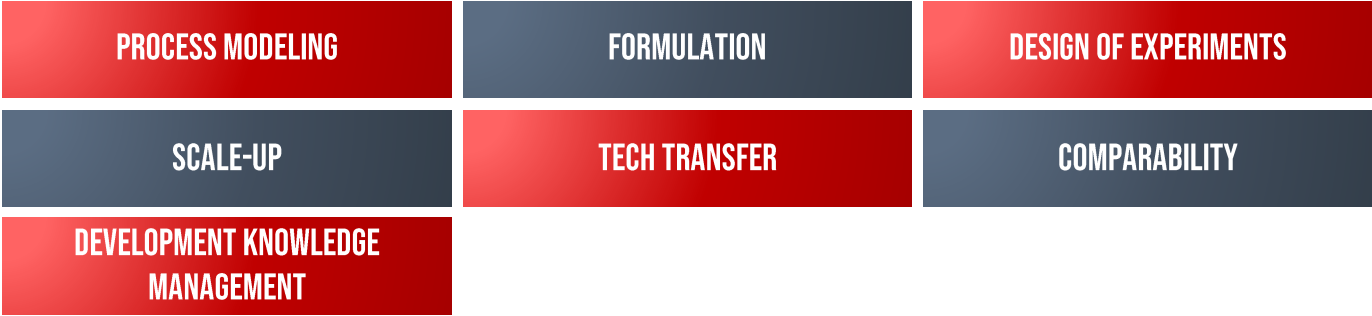
CATEGORY 21
DEVELOPMENT & MANUFACTURING | BLACK BOOK PERFORMANCE

PROCESS DEVELOPMENT, FORMULATION, SCALE-UP AND TECHNOLOGY TRANSFER

CATEGORY SCOPE

Process modeling, formulation, design of experiments, scale-up, tech transfer, comparability and development knowledge management.

CATEGORY PERFORMANCE FEATURES



BLACK BOOK CLIENT-RATED VENDOR PERFORMANCE

Rank	Top-performing Vendor / Platform / Service	Black Book Score
1	Siemens	9.33
2	Dassault Systèmes BIOVIA	9.08
3	AspenTech	8.82
4	Emerson	8.54
5	Sartorius	8.27
6	Cytiva	7.99
7	Seeq	7.71
8	Aizon	7.43
9	Apprentice	7.15
10	Körber Pharma	6.87

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CATEGORY 21

DEVELOPMENT & MANUFACTURING | COMPETITIVE INTELLIGENCE

PROCESS DEVELOPMENT, FORMULATION, SCALE-UP AND TECHNOLOGY TRANSFER

DARK-HORSE CHALLENGERS

Vendor	Why It Merits Dark-horse Monitoring
Sartorius	Process development instruments, data and bioprocess expertise create a strong foundation for integrated modeling and scale-up intelligence.
Cytiva	Bioprocess workflow depth and manufacturing-domain expertise can support technology transfer and development knowledge continuity.
Seq	Advanced industrial analytics can expose process relationships and support scale-up decisions without requiring a full platform replacement.

STARTUP & SCALEUP WATCHLIST

Company	Category Application And Watch Rationale
Aizon	GxP-oriented industrial AI targets process understanding, anomaly detection and regulated manufacturing analytics.
Apprentice	Connected-worker and manufacturing intelligence capabilities can carry process knowledge from development into execution.
DataHow	Hybrid mechanistic and data-driven bioprocess models target faster development, scale-up and transfer decisions.

MARKET SIGNAL

Vendors must demonstrate that models improve process robustness, comparability and transfer—not simply fit historical development data.

INTERPRETATION RULE: Dark-horse and startup/scaleup watchlist placement provide competitive context only. They do not replace, extend or constitute a Black Book client-performance award.

CATEGORY 22
DEVELOPMENT & MANUFACTURING | BLACK BOOK PERFORMANCE

GXP SMART MANUFACTURING, MES, DIGITAL TWINS AND ADVANCED PROCESS CONTROL

CATEGORY SCOPE

MES, electronic batch records, process analytics, PAT, digital twins, predictive operations and manufacturing execution.

CATEGORY PERFORMANCE FEATURES

MES

ELECTRONIC BATCH RECORDS

PROCESS ANALYTICS

PAT

DIGITAL TWINS

PREDICTIVE OPERATIONS

MANUFACTURING EXECUTION

BLACK BOOK CLIENT-RATED VENDOR
PERFORMANCE

Rank	Top-performing Vendor / Platform / Service	Black Book Score
1	Siemens	9.39
2	Rockwell Automation	9.15
3	Körber Pharma	8.87
4	Emerson	8.54
5	Honeywell	8.22
6	Apprentice	7.93
7	Aizon	7.65
8	Seeq	7.36
9	AspenTech	7.09
10	AVEVA / Schneider Electric	6.79

Scores represent the 2026 Black Book client and user evaluation for the defined category. Rankings and scores are product-, service- and market-specific and do not extend to unrelated offerings. Full 18 KPI competitive performance reports are available.

CATEGORY 22

DEVELOPMENT & MANUFACTURING | COMPETITIVE INTELLIGENCE

GXP SMART MANUFACTURING, MES, DIGITAL TWINS AND ADVANCED PROCESS CONTROL

DARK-HORSE CHALLENGERS

Vendor	Why It Merits Dark-horse Monitoring
AspenTech	Process simulation, optimization and industrial analytics offer deep engineering capabilities for complex continuous and batch operations.
AVEVA / Schneider Electric	Industrial data infrastructure and operations technology can support connected biopharma plants at enterprise scale.
Seeq	Rapid advanced analytics across historian and process data provide a focused path to predictive operations and root-cause analysis.

STARTUP & SCALEUP WATCHLIST

Company	Category Application And Watch Rationale
Apprentice	AI-assisted connected-worker and manufacturing execution capabilities target complex, high-value biopharma production.
Aizon	Regulated industrial AI and process intelligence provide a specialist route to predictive quality and operational optimization.
Tulip	Composable frontline operations software can digitize work instructions, data capture and production workflows without monolithic MES replacement.

MARKET SIGNAL

The strongest challengers will prove validated integration with MES, historians and automation layers plus measurable gains in yield, cycle time, right-first-time performance and release readiness.

INTERPRETATION RULE: Dark-horse and startup/scaleup watchlist placement provide competitive context only. They do not replace, extend or constitute a Black Book client-performance award.

CATEGORY 23

QUALITY & VALIDATION | BLACK BOOK PERFORMANCE

PREDICTIVE QUALITY, DEVIATIONS, CAPA, BATCH REVIEW AND VALIDATION INTELLIGENCE

CATEGORY SCOPE

Quality management, deviation triage, root cause, CAPA, validation, document review, inspection readiness and release support.

CATEGORY PERFORMANCE FEATURES



BLACK BOOK CLIENT-RATED VENDOR PERFORMANCE

Rank	Top-performing Vendor / Platform / Service	Black Book Score
1	Veeva	9.35
2	Honeywell TrackWise	9.11
3	MasterControl	8.85
4	ValGenesis	8.49
5	Körber Pharma	8.16
6	Apprentice	7.88
7	Aizon	7.60
8	ETQ	7.33
9	ComplianceQuest	7.04
10	Dot Compliance	6.76

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CATEGORY 23
QUALITY & VALIDATION | COMPETITIVE INTELLIGENCE

PREDICTIVE QUALITY, DEVIATIONS, CAPA, BATCH REVIEW AND VALIDATION INTELLIGENCE

DARK-HORSE CHALLENGERS

Vendor	Why It Merits Dark-horse Monitoring
ValGenesis	Digital validation lifecycle management provides specialized depth where general quality suites remain document-centric.
ComplianceQuest	Cloud quality and safety workflows can serve organizations seeking broader operational quality without the cost of the largest life-sciences platforms.
ETQ	Configurable quality management and analytics offer a credible cross-industry alternative for regulated manufacturers.

STARTUP & SCALEUP WATCHLIST

Company	Category Application And Watch Rationale
Dot Compliance	Cloud-native eQMS and validation automation target faster implementation for growth-stage regulated companies.
Scilife	An accessible life-sciences quality platform may appeal to smaller manufacturers and laboratories needing integrated QMS workflows.
Ketryx	Continuous compliance and traceability for software-enabled products create a differentiated quality and validation niche.

MARKET SIGNAL

Buyer evaluation should emphasize closed-loop deviation and CAPA performance, validation effort, audit trail quality, inspection readiness and actual reduction in review cycle time.

INTERPRETATION RULE: Dark-horse and startup/scaleup watchlist placement provide competitive context only. They do not replace, extend or constitute a Black Book client-performance award.

CATEGORY 24A
SUPPLY CHAIN | BLACK BOOK PERFORMANCE

SUPPLY PLANNING, DEMAND FORECASTING, INVENTORY AND RESILIENCE

CATEGORY SCOPE

Network planning, demand sensing, launch readiness, inventory, shortage risk, supplier visibility and scenario optimization.

CATEGORY PERFORMANCE FEATURES



BLACK BOOK CLIENT-RATED VENDOR PERFORMANCE

Rank	Top-performing Vendor / Platform / Service	Black Book Score
1	Kinaxis	9.36
2	o9 Solutions	9.12
3	SAP Integrated Business Planning	8.84
4	Blue Yonder	8.51
5	Oracle SCM	8.18
6	TraceLink	7.91
7	e2open	7.62
8	Logility	7.35
9	Anaplan	7.05
10	Coupa	6.78

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CATEGORY 24A
SUPPLY CHAIN | COMPETITIVE INTELLIGENCE

SUPPLY PLANNING, DEMAND FORECASTING, INVENTORY AND RESILIENCE

DARK-HORSE CHALLENGERS

Vendor	Why It Merits Dark-horse Monitoring
TraceLink	A life-sciences network and multienterprise data model can extend from traceability into planning, supplier visibility and disruption response.
Logility	Demand and inventory optimization provide a focused alternative for organizations that do not require the broadest enterprise-planning suite.
Anaplan	Connected planning can unify commercial, finance and supply scenarios, although life-sciences depth must be demonstrated by implementation.

STARTUP & SCALEUP WATCHLIST

Company	Category Application And Watch Rationale
Aera Technology	Decision intelligence and autonomous recommendations can support rapid response across supply, inventory and allocation.
ThroughPut AI	Operational analytics target bottlenecks, material flow and working-capital improvement using existing enterprise data.
Lokad	Probabilistic forecasting and quantitative supply-chain optimization provide a specialized alternative to conventional planning suites.

MARKET SIGNAL

Life-sciences buyers should require forecast accuracy by product stage, shortage and expiry reduction, launch scenario quality and supplier-network visibility—not generic planning demonstrations.

INTERPRETATION RULE: Dark-horse and startup/scaleup watchlist placement provide competitive context only. They do not replace, extend or constitute a Black Book client-performance award.

CATEGORY 24B
SUPPLY CHAIN | BLACK BOOK PERFORMANCE

CLINICAL SUPPLY, COLD CHAIN, SERIALIZATION AND CHAIN-OF-IDENTITY INTELLIGENCE

CATEGORY SCOPE

IRT/RTSM, packaging, labeling, temperature, logistics, serialization, cell/gene chain of identity and patient-level traceability.

CATEGORY PERFORMANCE FEATURES



BLACK BOOK CLIENT-RATED VENDOR
PERFORMANCE

Rank	Top-performing Vendor / Platform / Service	Black Book Score
1	Controlant	9.31
2	TraceLink	9.04
3	Sensitech	8.79
4	Cryoport	8.44
5	SkyCell	8.11
6	Tive	7.83
7	Roambee	7.56
8	ParkourSC	7.28
9	Suvoda	6.99
10	TrakCel	6.71

Scores represent the 2026 Black Book client and user evaluation for the defined category. Rankings and scores are product-, service- and market-specific and do not extend to unrelated offerings. Full 18 KPI competitive performance reports are available.

CATEGORY 24A

SUPPLY CHAIN | COMPETITIVE INTELLIGENCE

CLINICAL SUPPLY, COLD CHAIN, SERIALIZATION AND CHAIN-OF-IDENTITY INTELLIGENCE

DARK-HORSE CHALLENGERS

Vendor	Why It Merits Dark-horse Monitoring
Sensitech	Temperature monitoring, logistics visibility and cold-chain expertise give it substantial depth in regulated product movement.
Suvoda	RTSM and clinical-supply capabilities offer a strong operational position across randomization, inventory and patient-level trial supply.
TrakCel	Cell and gene therapy orchestration provides specialized chain-of-identity and chain-of-custody capabilities for complex therapies.

STARTUP & SCALEUP WATCHLIST

Company	Category Application And Watch Rationale
SkyCell	Temperature-controlled containers, monitoring and software support high-value pharmaceutical logistics with a data-rich operating model.
Tive	Real-time shipment visibility and sensor data can extend cold-chain control beyond traditional lane-level monitoring.
ParkourSC	Supply-network intelligence and risk monitoring target end-to-end visibility for complex life-sciences logistics.

MARKET SIGNAL

The category should be measured on excursion prevention, inventory availability, patient-level traceability, release delays and exception resolution across partners.

INTERPRETATION RULE: Dark-horse and startup/scaleup watchlist placement provide competitive context only. They do not replace, extend or constitute a Black Book client-performance award.

11

MEDICAL, COMMERCIAL AND ENTERPRISE SERVICES PERFORMANCE & MARKET INTELLIGENCE

These markets evaluate compliant scientific engagement, commercial and launch execution, enterprise AI controls, implementation, systems integration, change adoption and managed delivery.

EACH CATEGORY IS PRESENTED IN THE SAME SEQUENCE:

Defined scope and performance features, Black Book client-rated ranking, dark-horse challengers, startup/scaleup watchlist and market signal.

DOMAIN AT-A-GLANCE KEY SAMPLE

ID	Category / Black Book Leader	Featured Dark Horse	Startup / Scaleup To Watch
25	Medical affairs, scientific engagement and omnichannel content intelligence #1 Veeva Medical — 9.33	Envision Pharma Group	H1
26	Commercial analytics, CRM, launch and field-force intelligence #1 Veeva Vault CRM / Nitro — 9.36	Axtria	PharmaForceIQ
27	AI governance, model validation, MLOps, cybersecurity and controlled deployment #1 SAS — 9.31	Arize AI	Credo AI
28	Life-sciences AI consulting, systems integration and managed services #1 Accenture — 9.34	Tata Consultancy Services	Quantori

Dark-horse and startup/scaleup watchlist placement are contextual intelligence. They do not replace, extend or constitute a Black Book client-performance award.

CATEGORY 22

MEDICAL & EXTERNAL ENGAGEMENT | BLACK BOOK PERFORMANCE

MEDICAL AFFAIRS, SCIENTIFIC ENGAGEMENT AND OMNICHANNEL CONTENT INTELLIGENCE

CATEGORY SCOPE

Medical strategy, evidence dissemination, publications, congresses, MSL insights, compliant content and stakeholder engagement.

CATEGORY PERFORMANCE FEATURES



BLACK BOOK CLIENT-RATED VENDOR PERFORMANCE

Rank	Top-performing Vendor / Platform / Service	Black Book Score
1	Veeva Medical	9.33
2	Indegene	9.08
3	IQVIA	8.82
4	Envision Pharma Group	8.55
5	Within3	8.28
6	Aktana	7.99
7	ZS	7.72
8	OPEN Health	7.44
9	EVERSANA	7.16
10	Atrix AI	6.88

Scores represent the 2026 Black Book client and user evaluation for the defined category. Rankings and scores are product-, service- and market-specific and do not extend to unrelated offerings. Full 18 KPI competitive performance reports are available.

CATEGORY 25

MEDICAL & EXTERNAL ENGAGEMENT | COMPETITIVE INTELLIGENCE

MEDICAL AFFAIRS, SCIENTIFIC ENGAGEMENT AND OMNICHANNEL CONTENT INTELLIGENCE

DARK-HORSE CHALLENGERS

Vendor	Why It Merits Dark-horse Monitoring
Envision Pharma Group	Scientific communications, publications and technology services create an integrated alternative for medical-affairs teams.
Within3	Insight management and virtual engagement tools can unify stakeholder intelligence across advisory, community and field activities.
Aktana	Decision support and next-best-action capabilities can extend into coordinated medical engagement when governance is clearly separated from promotion.

STARTUP & SCALEUP WATCHLIST

Company	Category Application And Watch Rationale
H1	Healthcare professional, trial and scientific-network intelligence can support expert identification, engagement planning and medical strategy.
Sorcero	Language intelligence for medical content targets faster review, reuse and evidence-grounded scientific communications.
Atrix AI	Medical-affairs workflow and intelligence tools offer a focused alternative to broad commercial engagement platforms.

MARKET SIGNAL

Performance should be tied to compliant content velocity, insight quality, scientific engagement, publication execution and reuse of evidence across channels.

INTERPRETATION RULE: Dark-horse and startup/scaleup watchlist placement provide competitive context only. They do not replace, extend or constitute a Black Book client-performance award.

CATEGORY 26
COMMERCIAL OPERATIONS | BLACK BOOK PERFORMANCE

COMMERCIAL ANALYTICS, CRM, LAUNCH AND FIELD-FORCE INTELLIGENCE

CATEGORY SCOPE

Life-sciences CRM, next-best action, customer intelligence, territory, launch, forecasting, omnichannel and field execution.

CATEGORY PERFORMANCE FEATURES

LIFE-SCIENCES CRM

TERRITORY

OMNICHANNEL

NEXT-BEST ACTION

LAUNCH

FIELD EXECUTION

CUSTOMER INTELLIGENCE

FORECASTING

BLACK BOOK CLIENT-RATED VENDOR
PERFORMANCE

Rank	Top-performing Vendor / Platform / Service	Black Book Score
1	Veeva Vault CRM / Nitro	9.36
2	Salesforce Life Sciences Cloud	9.12
3	IQVIA	8.86
4	ZS	8.58
5	Aktana	8.31
6	Axtria	8.03
7	Indegene	7.75
8	EVERSANA	7.47
9	Model N	7.19
10	Exeevo	6.91

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CATEGORY 26

COMMERCIAL OPERATIONS | COMPETITIVE INTELLIGENCE

COMMERCIAL ANALYTICS, CRM, LAUNCH AND FIELD-FORCE INTELLIGENCE

DARK-HORSE CHALLENGERS

Vendor	Why It Merits Dark-horse Monitoring
Axtria	Commercial analytics, incentive compensation and field operations depth provide a strong life-sciences-specific alternative to general CRM platforms.
Model N	Revenue management, pricing and contracting data can strengthen commercial intelligence where gross-to-net economics drive decisions.
Exeevo	A life-sciences customer experience platform offers a focused CRM and omnichannel option for organizations seeking industry-specific workflows.

STARTUP & SCALEUP WATCHLIST

Company	Category Application And Watch Rationale
PharmaForceIQ	AI-enabled field planning and next-best-action tools target specialty and emerging-biopharma commercial teams.
Pitcher	Mobile sales enablement and closed-loop content workflows offer a focused omnichannel execution layer.
Doceree	Programmatic healthcare professional engagement and identity infrastructure may strengthen digital channel orchestration.

MARKET SIGNAL

Buyers should distinguish recommendation engines from systems that improve launch execution, field adoption, channel coordination, forecast quality and measurable commercial outcomes.

INTERPRETATION RULE: Dark-horse and startup/scaleup watchlist placement provide competitive context only. They do not replace, extend or constitute a Black Book client-performance award.

CATEGORY 27

ENTERPRISE GOVERNANCE | BLACK BOOK PERFORMANCE

AI GOVERNANCE, MODEL VALIDATION, MLOPS, CYBERSECURITY AND CONTROLLED DEPLOYMENT

CATEGORY SCOPE

Model inventory, risk classification, monitoring, change control, validation, security, privacy and regulated AI operations.

CATEGORY PERFORMANCE FEATURES

MODEL INVENTORY

RISK CLASSIFICATION

MONITORING

CHANGE CONTROL

VALIDATION

SECURITY

PRIVACY

REGULATED AI OPERATIONS

BLACK BOOK CLIENT-RATED VENDOR PERFORMANCE

Rank	Top-performing Vendor / Platform / Service	Black Book Score
1	SAS	9.31
2	Dataiku	9.07
3	Domino Data Lab	8.81
4	ModelOp	8.55
5	Palantir	8.27
6	Databricks	7.99
7	Arize AI	7.71
8	Fiddler AI	7.43
9	Credo AI	7.15
10	Arthur AI	6.87

Scores represent the 2026 Black Book client and user evaluation for the defined category. Rankings and scores are product-, service- and market-specific and do not extend to unrelated offerings. Full 18 KPI competitive performance reports are available.

CATEGORY 27
ENTERPRISE GOVERNANCE | COMPETITIVE INTELLIGENCE

AI GOVERNANCE, MODEL VALIDATION, MLOPS, CYBERSECURITY AND CONTROLLED DEPLOYMENT

DARK-HORSE CHALLENGERS

Vendor	Why It Merits Dark-horse Monitoring
Arize AI	Model observability and evaluation can provide technical depth for monitoring drift, performance and generative-AI behavior.
Fiddler AI	Explainability and monitoring capabilities are relevant where regulated teams need transparent model risk controls.
Arthur AI	Enterprise model monitoring and guardrails offer a practical control layer across heterogeneous AI stacks.

STARTUP & SCALEUP WATCHLIST

Company	Category Application And Watch Rationale
Credo AI	Policy-based AI governance and evidence management position it as a leading private specialist in responsible-AI operations.
Monitaur	Model governance and assurance workflows target regulated decision systems that require structured review and documentation.
Holistic AI	AI risk, compliance and testing capabilities provide a broad governance option for multinational organizations.

MARKET SIGNAL

Life-sciences differentiation will depend on GxP validation, model inventory, change control, human oversight, cybersecurity and evidence that controls work in production.

INTERPRETATION RULE: Dark-horse and startup/scaleup watchlist placement provide competitive context only. They do not replace, extend or constitute a Black Book client-performance award.

CATEGORY 28

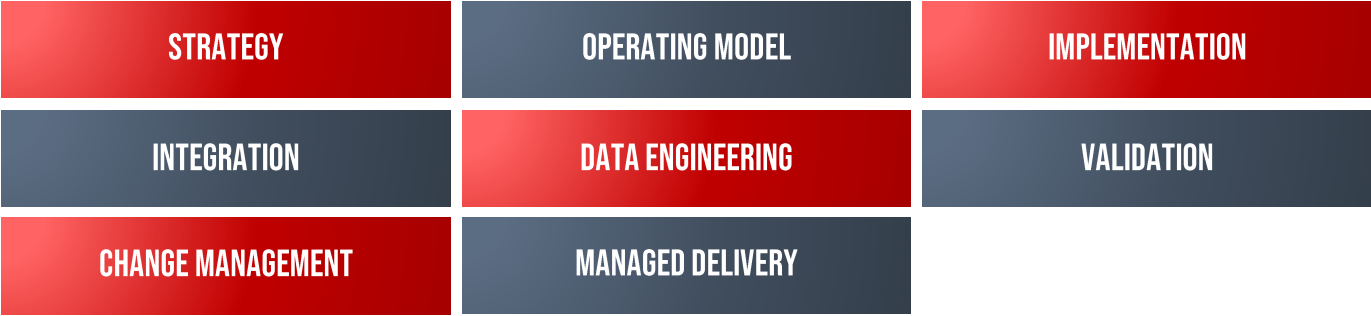
ENTERPRISE SERVICES | BLACK BOOK PERFORMANCE

LIFE-SCIENCES AI CONSULTING, SYSTEMS INTEGRATION AND MANAGED SERVICES

CATEGORY SCOPE

Strategy, operating model, implementation, integration, data engineering, validation, change management and managed delivery.

CATEGORY PERFORMANCE FEATURES



BLACK BOOK CLIENT-RATED VENDOR PERFORMANCE

Rank	Top-performing Vendor / Platform / Service	Black Book Score
1	Accenture	9.34
2	Deloitte	9.10
3	Cognizant	8.84
4	Capgemini	8.57
5	ZS	8.30
6	Tata Consultancy Services	8.02
7	PwC	7.74
8	Infosys	7.46
9	EPAM	7.18
10	Wipro	6.90

Scores represent the 2026 Black Book client and user evaluation for the defined category. Rankings and scores are product-, service- and market-specific and do not extend to unrelated offerings. Full 18 KPI competitive performance reports are available.

CATEGORY 28
ENTERPRISE SERVICES | COMPETITIVE INTELLIGENCE

LIFE-SCIENCES AI CONSULTING, SYSTEMS INTEGRATION AND MANAGED SERVICES

DARK-HORSE CHALLENGERS

Vendor	Why It Merits Dark-horse Monitoring
Tata Consultancy Services	Global delivery scale and life-sciences technology depth make TCS a credible challenger where transformation spans data, applications and operations.
EPAM	Strong product engineering and cloud capabilities can differentiate complex scientific and regulated platform implementations.
Wipro	Broad managed services and life-sciences experience may appeal to buyers consolidating technology operations and cost structures.

STARTUP & SCALEUP WATCHLIST

Company	Category Application And Watch Rationale
Quantori	A specialist scientific informatics and software-engineering firm can compete where domain expertise matters more than global scale.
Tenthpin	Life-sciences-focused consulting and SAP transformation capabilities make it a specialist challenger for regulated enterprise programs.
BioLizard	Bioinformatics, data science and AI services provide a focused partner model for biotechnology and translational-research teams.

MARKET SIGNAL

Service providers should be compared on domain talent, validated accelerators, implementation outcomes, change adoption and sustained managed-service performance—not total workforce alone.

INTERPRETATION RULE: Dark-horse and startup/scaleup watchlist placement provide competitive context only. They do not replace, extend or constitute a Black Book client-performance award.

12

2027 OUTLOOK AND BUYER PRIORITIES

TEN MARKET EXPECTATIONS THROUGH 2027

#	2027 Market Expectation
1	RWE purchasing continues to fragment into analytics, connectivity and evidence-strategy markets with separate leaders.
2	Life-sciences organizations consolidate redundant clinical and commercial point solutions while preserving specialist tools with superior user outcomes.
3	AI-ready data operating platforms gain budget as organizations confront semantic inconsistency, multimodal validation and lineage requirements.
4	Agentic AI expands first in bounded, reversible and human-approved workflows rather than autonomous regulated decisions.
5	Manufacturing, quality and supply-chain deployments receive greater executive attention because value can be measured through yield, cycle time, release, inventory and shortage performance.
6	GxP validation, model-change control and continuous monitoring become formal buying criteria rather than post-selection implementation tasks.
7	Digital biomarkers and remote trial technologies face stronger requirements for endpoint validation, device operations, participant adherence and submission-ready evidence.
8	Medical affairs and commercial technology converge around governed customer data, compliant content, field intelligence and cross-functional engagement.
9	Service partners are evaluated more rigorously on delivery accountability, knowledge transfer and measurable operating outcomes.
10	Vendor awards increasingly depend on product-specific client evidence; corporate breadth and acquisition activity do not guarantee inherited performance.

TEN MARKET EXPECTATIONS THROUGH 2027

Industry Segment	Highest-priority Technology, Platform, Software And Service Needs
Global pharmaceutical manufacturers	Platform consolidation; regulated AI governance; global clinical operations; manufacturing/quality analytics; commercial and medical integration.
Specialty and midmarket pharma	Time to value; implementation capacity; RWE and market access; launch readiness; managed services and scalable compliance.
Clinical-stage biotechnology	Discovery partnerships; trial feasibility and recruitment; eClinical execution; cash-efficient data foundations; regulatory and evidence strategy.
Commercial-stage biotechnology	Safety, RIM, medical affairs, market access, supply planning, commercial CRM and outsourced operating services.
Cell and gene therapy	Chain of identity; cold chain; small-cohort trial operations; advanced analytics; manufacturing control and patient-level traceability.
CROs and CDMOs	Sponsor-facing interoperability; automation; quality and validation; margin improvement; differentiated managed technology services.
Diagnostics and precision medicine	Genomics, pathology and imaging workflows; multimodal data; biomarker validation; companion diagnostics and evidence integration.
Academic and translational research	Interoperability; cohort discovery; research-ready data; reproducibility; secure collaboration and cost-effective implementation.

BLACK BOOK BUYER CHECKLIST

- Define the exact purchasing category and avoid vendor comparisons that mix unrelated products or service models.
- Require product-level references from organizations with comparable scientific, regulatory and operating complexity.
- Confirm data provenance, customer ownership, model lineage, version control and exit rights before implementation.
- Measure workflow adoption and human correction, not only model accuracy or demo performance.
- Validate integration with the systems that actually govern the workflow, including EDC, CTMS, LIMS, ELN, RIM, safety, MES, QMS, ERP and CRM environments.
- Require a documented context of use, risk classification and change-control process for AI-enabled regulated functions.
- Separate implementation and managed-service accountability from software functionality during contracting and scoring.
- Define measurable value before launch and track cycle time, quality, risk, cost, revenue protection and user productivity.
- Use sub-indexes when enterprise breadth and specialist depth cannot be represented fairly in one score.
- Reassess annual awards and renewal decisions using current users, current versions and current market definitions.

2027 STRATEGIC CONCLUSION

The best-performing life-sciences vendors will not be defined by AI branding alone. They will combine domain-specific performance, validated data, interoperable workflow design, regulated operating discipline and accountable service delivery.

13

APPENDIX

APPENDIX A

CATEGORY AND PRODUCT NORMALIZATION RULES

CORPORATE AND PRODUCT NORMALIZATION

Entity or Product Family	2026 Normalization Rule
Recursion and Exscientia [7]	One corporate group; results identify the rated discovery platform or engagement.
Tempus AI and Deep 6 AI [8]	One corporate group in recruitment and patient-matching markets; the rated product remains explicit.
Datavant and Aetion [9]	One corporate group; data-connectivity and Aetion evidence products remain product-specific.
Siemens and Dotmatics [10]	One corporate group following the completed acquisition; laboratory and scientific-data scores identify the applicable Dotmatics or Siemens product stack.
Clariness and SubjectWell [11]	One combined recruitment organization operating under the Clariness name; legacy product experience is normalized to the current service offering.
ActiGraph and Biofourmis Connect	Connected-device and digital-endpoint evaluations identify the current ActiGraph product or service.
Oracle Life Sciences product families	Clinical One, safety, RIM, data and supply-chain products do not inherit scores from one another.
Veeva product families	Clinical, safety, quality, regulatory, medical and commercial products are scored independently.

AWARD LANGUAGE CONTROLS

- Every award states the year, category, rated product or service and the basis of the client rating.
- A vendor may use a consecutive-year claim only when category boundaries and measurement instruments remain materially comparable.
- A category winner may not extend the award to unrelated modules, corporate subsidiaries or geographic markets not included in the score.
- Top-ten lists are shortened when fewer than ten products meet the minimum evidence standard.
- Black Book may publish separate enterprise, midmarket, emerging-biotech or specialist sub-indexes when buying requirements differ materially.

FIELD AND INTERPRETATION CONTROLS

Control	Application
Verification	Business identity, role, organization and product exposure are verified before a response enters scoring.
Weighting	Scores are normalized to prevent a single client, organization type, geography or vendor-supplied contact list from dominating.
Missing data	Respondents rate only KPIs they are qualified to assess; unobserved items are not imputed as positive performance.
Comments	Narrative feedback is reviewed for role consistency, product specificity and corroboration.
Ties and uncertainty	Co-leader language is used when the evidence does not support a defensible single winner.
Integrity events	Material unresolved security, data-integrity, regulatory or service failures may disqualify an award.

APPENDIX B

ALPHABETICAL DIRECTORY OF MARKET PARTICIPANTS, VENDOR CAPABILITIES AND CATEGORY APPLICATIONS

This directory presents every normalized vendor, platform, service organization and market participant appearing in the 29 Black Book scorecards or the integrated dark-horse and startup/scaleup profiles. Entries continue in one uninterrupted alphabetical sequence without letter-divider pages or category breaks.

254

NORMALIZED MARKET PARTICIPANTS

192

RANKED SCORECARD VENDORS

62

INTELLIGENCE-ONLY PARTICIPANTS

174

CATEGORY INTELLIGENCE PLACEMENTS

Category role labels identify whether an organization is client-rated in a Black Book scorecard, monitored as a dark-horse challenger or included on the startup/scaleup watchlist. Product-level scores remain limited to the specific ranked scorecard.

AB CUBE

Black Book category coverage: 15 — Pharmacovigilance and safety-signal intelligence. Integrated market-intelligence coverage: dark-horse challenger: 15 — Pharmacovigilance and safety-signal intelligence.

AB Cube is represented in Black Book Category 15 within the Pharmacovigilance and safety-signal intelligence market. Its category-relevant capability and application scope includes case intake, duplicate detection, coding, narratives, aggregate reporting, literature surveillance and signal management. The integrated report also profiles AB Cube as a dark-horse challenger in Category 15, where a focused pharmacovigilance platform and services model offers flexibility for regional and specialty sponsors.

ABSCI

Black Book category coverage: 3 — AI protein, antibody and biologics design.

Absci is represented in Black Book Category 3 within the AI protein, antibody and biologics design market. Its category-relevant capability and application scope includes protein engineering, antibody design, affinity and developability prediction, immunogenicity and multimodal biologics optimization.

ACCENTURE

Black Book category coverage: 28 — Life-sciences AI consulting, systems integration and managed services.

Accenture is represented in Black Book Category 28 within the Life-sciences AI consulting, systems integration and managed services market. Its category-relevant capability and application scope includes strategy, operating model, implementation, integration, data engineering, validation, change management and managed delivery.

ACTIGRAPH

Black Book category coverage: 11 — Digital biomarkers, connected devices and remote trial monitoring.

ActiGraph is represented in Black Book Category 11 within the Digital biomarkers, connected devices and remote trial monitoring market. Its category-relevant capability and application scope includes wearables, sensors, digital endpoints, remote measurement, participant adherence and regulatory-grade signal processing.

AERA TECHNOLOGY

Integrated market-intelligence coverage: startup/scaleup watchlist: 24A — Supply planning, demand forecasting, inventory and resilience.

It appears on the startup/scaleup watchlist in Category 24A because decision intelligence and autonomous recommendations can support rapid response across supply, inventory and allocation. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

AIFORIA

Black Book category coverage: 19 — Digital pathology, imaging AI and companion-diagnostic development. Integrated market-intelligence coverage: dark-horse challenger: 19 — Digital pathology, imaging AI and companion-diagnostic development.

Aiforia is represented in Black Book Category 19 within the Digital pathology, imaging AI and companion-diagnostic development market. Its category-relevant capability and application scope includes pathology and imaging workflow AI, quantitative biomarkers, companion diagnostics, validation and clinical-research integration. The integrated report also profiles Aiforia as a dark-horse challenger in Category 19, where cloud-native image analysis and configurable models can appeal to pathology organizations seeking faster deployment across research applications.

AITIA

Black Book category coverage: 1 — AI drug target discovery and pathway modeling; 6 — Digital twins, biosimulation and in silico development. Integrated market-intelligence coverage: dark-horse challenger: 1 — AI drug target discovery and pathway modeling.

Aitia is represented across 2 Black Book scorecards within the discovery & preclinical domain. The category-relevant applications include target discovery and biosimulation, virtual populations and digital twins. Each performance result remains tied to the named product or service in its individual comparison market. The integrated report also profiles Aitia as a dark-horse challenger in Category 1, where causal digital twins and mechanistic disease modeling create a differentiated bridge between patient data, target hypotheses and translational decisions.

AIZON

Black Book category coverage: 21 — Process development, formulation, scale-up and technology transfer; 22 — GxP smart manufacturing, MES, digital twins and advanced process control; 23 — Predictive quality, deviations, CAPA, batch review and validation intelligence. Integrated market-intelligence coverage: startup/scaleup watchlist: 21 — Process development, formulation, scale-up and technology transfer; 22 — GxP smart manufacturing, MES, digital twins and advanced process control.

Aizon is represented across 3 Black Book scorecards spanning development & manufacturing and quality & validation. The category-relevant applications include process development, formulation and technology transfer, GxP manufacturing, MES and advanced process control, and quality, deviations, CAPA, validation and batch review. Each performance result remains tied to the named product or service in its individual comparison market. It appears on the startup/scaleup watchlist in Category 21 because GxP-oriented industrial AI targets process understanding, anomaly detection and regulated manufacturing analytics. It is monitored in 2 startup/scaleup category profiles overall.

AKTANA

Black Book category coverage: 25 — Medical affairs, scientific engagement and omnichannel content intelligence; 26 — Commercial analytics, CRM, launch and field-force intelligence. Integrated market-intelligence coverage: dark-horse challenger: 25 — Medical affairs, scientific engagement and omnichannel content intelligence.

Aktana is represented across 2 Black Book scorecards spanning medical & external engagement and commercial operations. The category-relevant applications include medical affairs, scientific engagement and content intelligence and commercial analytics, CRM, launch and field execution. Each performance result remains tied to the named product or service in its individual comparison market. The integrated report also profiles Aktana as a dark-horse challenger in Category 25, where decision support and next-best-action capabilities can extend into coordinated medical engagement when governance is clearly separated from promotion.

ANAPLAN

Black Book category coverage: 24A — Supply planning, demand forecasting, inventory and resilience. Integrated market-intelligence coverage: dark-horse challenger: 24A — Supply planning, demand forecasting, inventory and resilience.

Anaplan is represented in Black Book Category 24A within the Supply planning, demand forecasting, inventory and resilience market. Its category-relevant capability and application scope includes network planning, demand sensing, launch readiness, inventory, shortage risk, supplier visibility and scenario optimization. The integrated report also profiles Anaplan as a dark-horse challenger in Category 24A, where connected planning can unify commercial, finance and supply scenarios, although life-sciences depth must be demonstrated by implementation.

ANTIDOTE

Black Book category coverage: 8 — Trial site selection, recruitment and patient matching. Integrated market-intelligence coverage: dark-horse challenger: 8 — Trial site selection, recruitment and patient matching.

Antidote is represented in Black Book Category 8 within the Trial site selection, recruitment and patient matching market. Its category-relevant capability and application scope includes site intelligence, cohort discovery, patient matching, referral, diversity, enrollment and retention performance. The integrated report also profiles Antidote as a dark-horse challenger in Category 8, where patient-centric matching and digital outreach remain differentiated for sponsors seeking direct-to-patient recruitment channels.

APPRENTICE

Black Book category coverage: 21 — Process development, formulation, scale-up and technology transfer; 22 — GxP smart manufacturing, MES, digital twins and advanced process control; 23 — Predictive quality, deviations, CAPA, batch review and validation intelligence. Integrated market-intelligence coverage: startup/scaleup watchlist: 21 — Process development, formulation, scale-up and technology transfer; 22 — GxP smart manufacturing, MES, digital twins and advanced process control.

Apprentice is represented across 3 Black Book scorecards spanning development & manufacturing and quality & validation. The category-relevant applications include process development, formulation and technology transfer, GxP manufacturing, MES and advanced process control, and quality, deviations, CAPA, validation and batch review. Each performance result remains tied to the named product or service in its individual comparison market. It appears on the startup/scaleup watchlist in Category 21 because connected-worker and manufacturing intelligence capabilities can carry process knowledge from development into execution. It is monitored in 2 startup/scaleup category profiles overall.

ARISGLOBAL

Black Book category coverage: 15 — Pharmacovigilance and safety-signal intelligence; 16 — Regulatory intelligence, RIM and submission-content automation.

ArisGlobal is represented across 2 Black Book scorecards within the safety & regulatory domain. The category-relevant applications include pharmacovigilance and safety-signal operations and regulatory information, authoring and submission operations. Each performance result remains tied to the named product or service in its individual comparison market.

ARIZE AI

Black Book category coverage: 27 — AI governance, model validation, MLOps, cybersecurity and controlled deployment. Integrated market-intelligence coverage: dark-horse challenger: 27 — AI governance, model validation, MLOps, cybersecurity and controlled deployment.

Arize AI is represented in Black Book Category 27 within the AI governance, model validation, MLOps, cybersecurity and controlled deployment market. Its category-relevant capability and application scope includes model inventory, risk classification, monitoring, change control, validation, security, privacy and regulated AI operations. The integrated report also profiles Arize AI as a dark-horse challenger in Category 27, where model observability and evaluation can provide technical depth for monitoring drift, performance and generative-AI behavior.

ARTHUR AI

Black Book category coverage: 27 — AI governance, model validation, MLOps, cybersecurity and controlled deployment. Integrated market-intelligence coverage: dark-horse challenger: 27 — AI governance, model validation, MLOps, cybersecurity and controlled deployment.

Arthur AI is represented in Black Book Category 27 within the AI governance, model validation, MLOps, cybersecurity and controlled deployment market. Its category-relevant capability and application scope includes model inventory, risk classification, monitoring, change control, validation, security, privacy and regulated AI operations. The integrated report also profiles Arthur AI as a dark-horse challenger in Category 27, where enterprise model monitoring and guardrails offer a practical control layer across heterogeneous AI stacks.

ARTIFICIAL

Integrated market-intelligence coverage: startup/scaleup watchlist: 20 — Laboratory informatics, scientific data and autonomous-lab enablement.

It appears on the startup/scaleup watchlist in Category 20 because a laboratory automation orchestration layer can connect instruments, workflows and data without replacing every system of record. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

ASPENTECH

Black Book category coverage: 21 — Process development, formulation, scale-up and technology transfer; 22 — GxP smart manufacturing, MES, digital twins and advanced process control. **Integrated market-intelligence coverage:** dark-horse challenger: 22 — GxP smart manufacturing, MES, digital twins and advanced process control.

AspenTech is represented across 2 Black Book scorecards within the development & manufacturing domain. The category-relevant applications include process development, formulation and technology transfer and GxP manufacturing, MES and advanced process control. Each performance result remains tied to the named product or service in its individual comparison market. The integrated report also profiles AspenTech as a dark-horse challenger in Category 22, where process simulation, optimization and industrial analytics offer deep engineering capabilities for complex continuous and batch operations.

ASTHRA AI

Integrated market-intelligence coverage: startup/scaleup watchlist: 16 — Regulatory intelligence, RIM and submission-content automation.

It appears on the startup/scaleup watchlist in Category 16 because a focused regulatory-writing assistant may appeal to emerging biopharma teams needing controlled document acceleration. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

ATARAXIS AI

Integrated market-intelligence coverage: startup/scaleup watchlist: 4 — Biomarker, multi-omics and precision-research intelligence.

It appears on the startup/scaleup watchlist in Category 4 because pathology foundation models for treatment-response prediction could expand from oncology diagnostics into biomarker-led development. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

ATOMWISE

Black Book category coverage: 2 — Generative small-molecule design and optimization.

Atomwise is represented in Black Book Category 2 within the Generative small-molecule design and optimization market. Its category-relevant capability and application scope includes molecular generation, virtual screening, medicinal chemistry optimization, ADMET prediction and design-make-test-learn acceleration.

ATRIX AI

Black Book category coverage: 25 — Medical affairs, scientific engagement and omnichannel content intelligence. **Integrated market-intelligence coverage:** startup/scaleup watchlist: 25 — Medical affairs, scientific engagement and omnichannel content intelligence.

Atrix AI is represented in Black Book Category 25 within the Medical affairs, scientific engagement and omnichannel content intelligence market. Its category-relevant capability and application scope includes medical strategy, evidence dissemination, publications, congresses, MSL insights, compliant content and stakeholder engagement. It appears on the startup/scaleup watchlist in Category 25 because medical-affairs workflow and intelligence tools offer a focused alternative to broad commercial engagement platforms.

ATROPOS HEALTH

Integrated market-intelligence coverage: startup/scaleup watchlist: 12 — AI-enabled self-service RWE analytics and cohort intelligence.

It appears on the startup/scaleup watchlist in Category 12 because rapid evidence generation and federated data access target the gap between clinical questions and reproducible observational analysis. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

AURAL ANALYTICS

Integrated market-intelligence coverage: startup/scaleup watchlist: 11 — Digital biomarkers, connected devices and remote trial monitoring.

It appears on the startup/scaleup watchlist in Category 11 because speech-based digital biomarkers target neurological and psychiatric measurement where passive, repeatable assessment has high value. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

AVALERE

Black Book category coverage: 14 — HEOR, market access, pricing and evidence strategy technology/services. **Integrated market-intelligence coverage:** dark-horse challenger: 14 — HEOR, market access, pricing and evidence strategy technology/services.

Avalere is represented in Black Book Category 14 within the HEOR, market access, pricing and evidence strategy technology/services market. Its category-relevant capability and application scope includes economic modeling, outcomes research, value dossiers, pricing, reimbursement, payer evidence and evidence strategy services. The integrated report also profiles Avalere as a dark-horse challenger in Category 14, where policy, payer and evidence expertise can translate analytics into reimbursement and access decisions rather than isolated HEOR outputs.

AVEVA / SCHNEIDER ELECTRIC

Black Book category coverage: 22 — GxP smart manufacturing, MES, digital twins and advanced process control. Integrated market-intelligence coverage: dark-horse challenger: 22 — GxP smart manufacturing, MES, digital twins and advanced process control.

AVEVA / Schneider Electric is represented in Black Book Category 22 within the GxP smart manufacturing, MES, digital twins and advanced process control market. Its category-relevant capability and application scope includes MES, electronic batch records, process analytics, PAT, digital twins, predictive operations and manufacturing execution. The integrated report also profiles AVEVA / Schneider Electric as a dark-horse challenger in Category 22, where industrial data infrastructure and operations technology can support connected biopharma plants at enterprise scale.

AXTRIA

Black Book category coverage: 26 — Commercial analytics, CRM, launch and field-force intelligence. Integrated market-intelligence coverage: dark-horse challenger: 26 — Commercial analytics, CRM, launch and field-force intelligence.

Axtria is represented in Black Book Category 26 within the Commercial analytics, CRM, launch and field-force intelligence market. Its category-relevant capability and application scope includes life-sciences CRM, next-best action, customer intelligence, territory, launch, forecasting, omnichannel and field execution. The integrated report also profiles Axtria as a dark-horse challenger in Category 26, where commercial analytics, incentive compensation and field operations depth provide a strong life-sciences-specific alternative to general CRM platforms.

BEACONCURE

Integrated market-intelligence coverage: startup/scaleup watchlist: 10 — Clinical data review, RBQM and automated trial-quality intelligence.

It appears on the startup/scaleup watchlist in Category 10 because automated statistical review of clinical outputs targets a high-risk quality-control bottleneck near submission. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

BENCHLING

Black Book category coverage: 20 — Laboratory informatics, scientific data and autonomous-lab enablement.

Benchling is represented in Black Book Category 20 within the Laboratory informatics, scientific data and autonomous-lab enablement market. Its category-relevant capability and application scope includes LIMS, ELN, SDMS, instrument integration, scientific data clouds, lab automation and experiment orchestration.

BENCHSCI

Black Book category coverage: 5 — Scientific literature, patent and knowledge mining. Integrated market-intelligence coverage: dark-horse challenger: 5 — Scientific literature, patent and knowledge mining.

BenchSci is represented in Black Book Category 5 within the Scientific literature, patent and knowledge mining market. Its category-relevant capability and application scope includes nLP, semantic search, evidence synthesis, patent intelligence, competitive landscapes and scientific knowledge graphs. The integrated report also profiles BenchSci as a dark-horse challenger in Category 5, where biological relationship mapping and experiment intelligence offer a practical route from literature and data to actionable preclinical decisions.

BENEVOLENTAI

Black Book category coverage: 1 — AI drug target discovery and pathway modeling.

BenevolentAI is represented in Black Book Category 1 within the AI drug target discovery and pathway modeling market. Its category-relevant capability and application scope includes target identification, causal biology, disease networks, pathway prioritization and sponsor-partner execution.

BIGHAT BIOSCIENCES

Black Book category coverage: 3 — AI protein, antibody and biologics design. Integrated market-intelligence coverage: dark-horse challenger: 3 — AI protein, antibody and biologics design.

BigHat Biosciences is represented in Black Book Category 3 within the AI protein, antibody and biologics design market. Its category-relevant capability and application scope includes protein engineering, antibody design, affinity and developability prediction, immunogenicity and multimodal biologics optimization. The integrated report also profiles BigHat Biosciences as a dark-horse challenger in Category 3, where machine learning linked to high-throughput characterization can support developability and functional optimization, not merely binding prediction.

BIOLIZARD

Integrated market-intelligence coverage: startup/scaleup watchlist: 28 — Life-sciences AI consulting, systems integration and managed services.

It appears on the startup/scaleup watchlist in Category 28 because bioinformatics, data science and AI services provide a focused partner model for biotechnology and translational-research teams. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

BIOLOGIC DESIGN

Black Book category coverage: 3 — AI protein, antibody and biologics design. Integrated market-intelligence coverage: dark-horse challenger: 3 — AI protein, antibody and biologics design.

Biologic Design is represented in Black Book Category 3 within the AI protein, antibody and biologics design market. Its category-relevant capability and application scope includes protein engineering, antibody design, affinity and developability prediction, immunogenicity and multimodal biologics optimization. The integrated report also profiles Biologic Design as a dark-horse challenger in Category 3, where multispecific antibody design and computational biology expertise provide a specialized position in complex biologics engineering.

BIORELATE

Integrated market-intelligence coverage: startup/scaleup watchlist: 5 — Scientific literature, patent and knowledge mining.

It appears on the startup/scaleup watchlist in Category 5 because biomedical text mining and relationship extraction target high-volume evidence discovery for research and competitive intelligence. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

BLUE YONDER

Black Book category coverage: 24A — Supply planning, demand forecasting, inventory and resilience.

Blue Yonder is represented in Black Book Category 24A within the Supply planning, demand forecasting, inventory and resilience market. Its category-relevant capability and application scope includes network planning, demand sensing, launch readiness, inventory, shortage risk, supplier visibility and scenario optimization.

CADENCE MOLECULAR SCIENCES (OPENEYE)

Black Book category coverage: 2 — Generative small-molecule design and optimization.

Cadence Molecular Sciences (OpenEye) is represented in Black Book Category 2 within the Generative small-molecule design and optimization market. Its category-relevant capability and application scope includes molecular generation, virtual screening, medicinal chemistry optimization, ADMET prediction and design-make-test-learn acceleration. Scorecard references include Cadence OpenEye.

CAPGEMINI

Black Book category coverage: 28 — Life-sciences AI consulting, systems integration and managed services.

Capgemini is represented in Black Book Category 28 within the Life-sciences AI consulting, systems integration and managed services market. Its category-relevant capability and application scope includes strategy, operating model, implementation, integration, data engineering, validation, change management and managed delivery.

CAS

Black Book category coverage: 5 — Scientific literature, patent and knowledge mining.

CAS is represented in Black Book Category 5 within the Scientific literature, patent and knowledge mining market. Its category-relevant capability and application scope includes nLP, semantic search, evidence synthesis, patent intelligence, competitive landscapes and scientific knowledge graphs. Scorecard references include CAS SciFinder.

CASTOR

Black Book category coverage: 9 — eClinical and decentralized trial execution. Integrated market-intelligence coverage: dark-horse challenger: 9 — eClinical and decentralized trial execution.

Castor is represented in Black Book Category 9 within the eClinical and decentralized trial execution market. Its category-relevant capability and application scope includes cTMS, EDC, eSource, eConsent, eCOA, eTMF, IRT and decentralized/hybrid-trial technology and services. The integrated report also profiles Castor as a dark-horse challenger in Category 9, where flexible cloud EDC and decentralized-study capabilities can serve midmarket sponsors that find enterprise suites too complex or costly.

CAUSALY

Black Book category coverage: 5 — Scientific literature, patent and knowledge mining. Integrated market-intelligence coverage: startup/scaleup watchlist: 5 — Scientific literature, patent and knowledge mining.

Causaly is represented in Black Book Category 5 within the Scientific literature, patent and knowledge mining market. Its category-relevant capability and application scope includes nLP, semantic search, evidence synthesis, patent intelligence, competitive landscapes and scientific knowledge graphs. It appears on the startup/scaleup watchlist in Category 5 because causal knowledge graphs and natural-language exploration can accelerate evidence synthesis across discovery and translational research.

CERTARA

Black Book category coverage: 6 — Digital twins, biosimulation and in silico development; 14 — HEOR, market access, pricing and evidence strategy technology/services.

Certara is represented across 2 Black Book scorecards spanning discovery & preclinical and evidence & market access. The category-relevant applications include biosimulation, virtual populations and digital twins and HEOR, market access, pricing and evidence strategy. Each performance result remains tied to the named product or service in its individual comparison market.

CHEMIFY

Black Book category coverage: 2 — Generative small-molecule design and optimization. Integrated market-intelligence coverage: dark-horse challenger: 2 — Generative small-molecule design and optimization.

Chemify is represented in Black Book Category 2 within the Generative small-molecule design and optimization market. Its category-relevant capability and application scope includes molecular generation, virtual screening, medicinal chemistry optimization, ADMET prediction and design-make-test-learn acceleration. The integrated report also profiles Chemify as a dark-horse challenger in Category 2, where a chemistry-first operating model linking digital design with automated synthesis could distinguish it from software-only platforms.

CITELINE (NORSTELLA)

Black Book category coverage: 7 — Protocol design, feasibility and trial simulation.

Citeline (Norstell) is represented in Black Book Category 7 within the Protocol design, feasibility and trial simulation market. Its category-relevant capability and application scope includes protocol optimization, eligibility design, scenario testing, feasibility, country/site planning and enrollment forecasting. Scorecard references include Citeline / Norstell.

CLARINESS

Black Book category coverage: 8 — Trial site selection, recruitment and patient matching. Integrated market-intelligence coverage: dark-horse challenger: 8 — Trial site selection, recruitment and patient matching.

Clariness is represented in Black Book Category 8 within the Trial site selection, recruitment and patient matching market. Its category-relevant capability and application scope includes site intelligence, cohort discovery, patient matching, referral, diversity, enrollment and retention performance. Scorecard references include Clariness (including SubjectWell). The integrated report also profiles Clariness as a dark-horse challenger in Category 8, where combined digital recruitment, site and patient-service capabilities create scale across awareness, referral and enrollment.

CLARIO

Black Book category coverage: 9 — eClinical and decentralized trial execution; 11 — Digital biomarkers, connected devices and remote trial monitoring.

Clario is represented across 2 Black Book scorecards within the clinical development domain. The category-relevant applications include eClinical and decentralized-trial execution and digital biomarkers, connected devices and remote monitoring. Each performance result remains tied to the named product or service in its individual comparison market.

CLARIVATE

Black Book category coverage: 5 — Scientific literature, patent and knowledge mining; 14 — HEOR, market access, pricing and evidence strategy technology/services; 16 — Regulatory intelligence, RIM and submission-content automation.

Clarivate is represented across 3 Black Book scorecards spanning discovery & preclinical, evidence & market access, and safety & regulatory. The category-relevant applications include scientific, literature and patent intelligence, HEOR, market access, pricing and evidence strategy, and regulatory information, authoring and submission operations. Each performance result remains tied to the named product or service in its individual comparison market. Scorecard references include Clarivate and Clarivate Cortellis.

CLUEPOINTS

Black Book category coverage: 10 — Clinical data review, RBQM and automated trial-quality intelligence.

CluePoints is represented in Black Book Category 10 within the Clinical data review, RBQM and automated trial-quality intelligence market. Its category-relevant capability and application scope includes central monitoring, anomaly detection, risk-based quality management, data review, query management and quality signals.

COGNIVIA

Integrated market-intelligence coverage: startup/scaleup watchlist: 7 — Protocol design, feasibility and trial simulation.

It appears on the startup/scaleup watchlist in Category 7 because behavioral and predictive analytics could improve protocol assumptions, placebo response planning and patient retention strategies. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

COGNIZANT

Black Book category coverage: 28 — Life-sciences AI consulting, systems integration and managed services.

Cognizant is represented in Black Book Category 28 within the Life-sciences AI consulting, systems integration and managed services market. Its category-relevant capability and application scope includes strategy, operating model, implementation, integration, data engineering, validation, change management and managed delivery.

COGNOMIQ

Black Book category coverage: 17 — AI-ready clinical and translational data operating platforms. Integrated market-intelligence coverage: startup/scaleup watchlist: 17 — AI-ready clinical and translational data operating platforms.

CognomiQ is represented in Black Book Category 17 within the AI-ready clinical and translational data operating platforms market. Its category-relevant capability and application scope includes multimodal ingestion, semantic harmonization, validation, interoperability, cohort tools, governance and AI-ready customer-controlled data. It appears on the startup/scaleup watchlist in Category 17 because semantic harmonization, cross-source validation and AI-ready clinical data operations make it a category-specific specialist to monitor.

COMPLIANCEQUEST

Black Book category coverage: 23 — Predictive quality, deviations, CAPA, batch review and validation intelligence. Integrated market-intelligence coverage: dark-horse challenger: 23 — Predictive quality, deviations, CAPA, batch review and validation intelligence.

ComplianceQuest is represented in Black Book Category 23 within the Predictive quality, deviations, CAPA, batch review and validation intelligence market. Its category-relevant capability and application scope includes quality management, deviation triage, root cause, CAPA, validation, document review, inspection readiness and release support. The integrated report also profiles ComplianceQuest as a dark-horse challenger in Category 23, where cloud quality and safety workflows can serve organizations seeking broader operational quality without the cost of the largest life-sciences platforms.

CONCERTAI

Black Book category coverage: 4 — Biomarker, multi-omics and precision-research intelligence; 8 — Trial site selection, recruitment and patient matching; 12 — AI-enabled self-service RWE analytics and cohort intelligence; 13 — RWD networks, linkage, tokenization and external controls. Integrated market-intelligence coverage: dark-horse challenger: 4 — Biomarker, multi-omics and precision-research intelligence; 12 — AI-enabled self-service RWE analytics and cohort intelligence.

ConcertAI is represented across 4 Black Book scorecards spanning discovery & preclinical, clinical development, and evidence & market access. The category-relevant applications include biomarker and multi-omics analysis, site selection, patient matching and recruitment, self-service real-world evidence analytics, and real-world data linkage, tokenization and external controls. Each performance result remains tied to the named product or service in its individual comparison market. The integrated report also profiles ConcertAI as a dark-horse challenger in Category 4, where oncology-focused multimodal data and evidence capabilities can connect biomarker work with trial and real-world research. It receives dark-horse monitoring in 2 categories overall.

CONTROLANT

Black Book category coverage: 24B — Clinical supply, cold chain, serialization and chain-of-identity intelligence.

Controlant is represented in Black Book Category 24B within the Clinical supply, cold chain, serialization and chain-of-identity intelligence market. Its category-relevant capability and application scope includes iRT/RTSM, packaging, labeling, temperature, logistics, serialization, cell/gene chain of identity and patient-level traceability.

CONVERGE BIO

Integrated market-intelligence coverage: startup/scaleup watchlist: 4 — Biomarker, multi-omics and precision-research intelligence.

It appears on the startup/scaleup watchlist in Category 4 because multimodal biological modeling and generative methods position it for focused biomarker and translational-research partnerships. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

COUPA

Black Book category coverage: 24A — Supply planning, demand forecasting, inventory and resilience.

Coupa is represented in Black Book Category 24A within the Supply planning, demand forecasting, inventory and resilience market. Its category-relevant capability and application scope includes network planning, demand sensing, launch readiness, inventory, shortage risk, supplier visibility and scenario optimization.

CRADLE

Black Book category coverage: 3 — AI protein, antibody and biologics design. Integrated market-intelligence coverage: startup/scaleup watchlist: 3 — AI protein, antibody and biologics design.

Cradle is represented in Black Book Category 3 within the AI protein, antibody and biologics design market. Its category-relevant capability and application scope includes protein engineering, antibody design, affinity and developability prediction, immunogenicity and multimodal biologics optimization. It appears on the startup/scaleup watchlist in Category 3 because a collaborative generative protein-engineering environment lowers the barrier to iterative sequence design and experimental learning.

CREDO AI

Black Book category coverage: 27 — AI governance, model validation, MLOps, cybersecurity and controlled deployment. Integrated market-intelligence coverage: startup/scaleup watchlist: 27 — AI governance, model validation, MLOps, cybersecurity and controlled deployment.

Credo AI is represented in Black Book Category 27 within the AI governance, model validation, MLOps, cybersecurity and controlled deployment market. Its category-relevant capability and application scope includes model inventory, risk classification, monitoring, change control, validation, security, privacy and regulated AI operations. It appears on the startup/scaleup watchlist in Category 27 because policy-based AI governance and evidence management position it as a leading private specialist in responsible-AI operations.

CRESSET

Black Book category coverage: 2 — Generative small-molecule design and optimization.

Cresset is represented in Black Book Category 2 within the Generative small-molecule design and optimization market. Its category-relevant capability and application scope includes molecular generation, virtual screening, medicinal chemistry optimization, ADMET prediction and design-make-test-learn acceleration.

CRYOPORT

Black Book category coverage: 24B — Clinical supply, cold chain, serialization and chain-of-identity intelligence.

Cryoport is represented in Black Book Category 24B within the Clinical supply, cold chain, serialization and chain-of-identity intelligence market. Its category-relevant capability and application scope includes iRT/RTSM, packaging, labeling, temperature, logistics, serialization, cell/gene chain of identity and patient-level traceability.

CUREBASE

Integrated market-intelligence coverage: startup/scaleup watchlist: 9 — eClinical and decentralized trial execution.

It appears on the startup/scaleup watchlist in Category 9 because site-less and hybrid-trial operations target community-based research and participant-centered execution. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

CYTEL

Black Book category coverage: 14 — HEOR, market access, pricing and evidence strategy technology/services.

Cytel is represented in Black Book Category 14 within the HEOR, market access, pricing and evidence strategy technology/services market. Its category-relevant capability and application scope includes economic modeling, outcomes research, value dossiers, pricing, reimbursement, payer evidence and evidence strategy services.

CYTIVA

Black Book category coverage: 21 — Process development, formulation, scale-up and technology transfer. Integrated market-intelligence coverage: dark-horse challenger: 21 — Process development, formulation, scale-up and technology transfer.

Cytiva is represented in Black Book Category 21 within the Process development, formulation, scale-up and technology transfer market. Its category-relevant capability and application scope includes process modeling, formulation, design of experiments, scale-up, tech transfer, comparability and development knowledge management. The integrated report also profiles Cytiva as a dark-horse challenger in Category 21, where bioprocess workflow depth and manufacturing-domain expertise can support technology transfer and development knowledge continuity.

CYTOREASON

Black Book category coverage: 6 — Digital twins, biosimulation and in silico development. Integrated market-intelligence coverage: dark-horse challenger: 6 — Digital twins, biosimulation and in silico development.

CytoReason is represented in Black Book Category 6 within the Digital twins, biosimulation and in silico development market. Its category-relevant capability and application scope includes quantitative systems pharmacology, virtual populations, disease progression, synthetic control and trial simulation. The integrated report also profiles CytoReason as a dark-horse challenger in Category 6, where human disease models built from multi-omics data provide a translational form of digital-twin intelligence for patient and mechanism stratification.

DASSAULT SYSTÈMES

Black Book category coverage: 6 — Digital twins, biosimulation and in silico development; 21 — Process development, formulation, scale-up and technology transfer.

Dassault Systèmes is represented across 2 Black Book scorecards spanning discovery & preclinical and development & manufacturing. The category-relevant applications include biosimulation, virtual populations and digital twins and process development, formulation and technology transfer. Each performance result remains tied to the named product or service in its individual comparison market. Scorecard references include Dassault Systèmes / Medidata and Dassault Systèmes BIOVIA.

DATABRICKS

Black Book category coverage: 17 — AI-ready clinical and translational data operating platforms; 27 — AI governance, model validation, MLOps, cybersecurity and controlled deployment.

Databricks is represented across 2 Black Book scorecards spanning data foundation and enterprise governance. The category-relevant applications include AI-ready clinical and translational data operations and AI governance, model validation, MLOps and controlled deployment. Each performance result remains tied to the named product or service in its individual comparison market. Scorecard references include Databricks and Databricks Data Intelligence Platform.

DATAHOW

Integrated market-intelligence coverage: startup/scaleup watchlist: 21 — Process development, formulation, scale-up and technology transfer.

It appears on the startup/scaleup watchlist in Category 21 because hybrid mechanistic and data-driven bioprocess models target faster development, scale-up and transfer decisions. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

DATAIKU

Black Book category coverage: 27 — AI governance, model validation, MLOps, cybersecurity and controlled deployment.

Dataiku is represented in Black Book Category 27 within the AI governance, model validation, MLOps, cybersecurity and controlled deployment market. Its category-relevant capability and application scope includes model inventory, risk classification, monitoring, change control, validation, security, privacy and regulated AI operations.

DATAVANT / AETION

Black Book category coverage: 12 — AI-enabled self-service RWE analytics and cohort intelligence; 13 — RWD networks, linkage, tokenization and external controls.

Datavant / Aetion is represented across 2 Black Book scorecards within the evidence & market access domain. The category-relevant applications include self-service real-world evidence analytics and real-world data linkage, tokenization and external controls. Each performance result remains tied to the named product or service in its individual comparison market.

DEEP BIO

Black Book category coverage: 19 — Digital pathology, imaging AI and companion-diagnostic development.

Deep Bio is represented in Black Book Category 19 within the Digital pathology, imaging AI and companion-diagnostic development market. Its category-relevant capability and application scope includes pathology and imaging workflow AI, quantitative biomarkers, companion diagnostics, validation and clinical-research integration.

DEEP GENOMICS

Black Book category coverage: 1 — AI drug target discovery and pathway modeling. Integrated market-intelligence coverage: dark-horse challenger: 1 — AI drug target discovery and pathway modeling.

Deep Genomics is represented in Black Book Category 1 within the AI drug target discovery and pathway modeling market. Its category-relevant capability and application scope includes target identification, causal biology, disease networks, pathway prioritization and sponsor-partner execution. The integrated report also profiles Deep Genomics as a dark-horse challenger in Category 1, where a focused RNA biology and machine-learning strategy gives it modality depth that broad discovery platforms may not match.

DELOITTE

Black Book category coverage: 28 — Life-sciences AI consulting, systems integration and managed services.

Deloitte is represented in Black Book Category 28 within the Life-sciences AI consulting, systems integration and managed services market. Its category-relevant capability and application scope includes strategy, operating model, implementation, integration, data engineering, validation, change management and managed delivery.

DIGITAL SCIENCE (DIMENSIONS)

Black Book category coverage: 5 — Scientific literature, patent and knowledge mining.

Digital Science (Dimensions) is represented in Black Book Category 5 within the Scientific literature, patent and knowledge mining market. Its category-relevant capability and application scope includes nLP, semantic search, evidence synthesis, patent intelligence, competitive landscapes and scientific knowledge graphs. Scorecard references include Dimensions / Digital Science.

DNANEXUS

Black Book category coverage: 4 — Biomarker, multi-omics and precision-research intelligence; 17 — AI-ready clinical and translational data operating platforms; 18 — Genomics, bioinformatics and precision-medicine workflow platforms.

DNAnexus is represented across 3 Black Book scorecards spanning discovery & preclinical, data foundation, and data & diagnostics. The category-relevant applications include biomarker and multi-omics analysis, AI-ready clinical and translational data operations, and genomics, bioinformatics and precision-medicine workflows. Each performance result remains tied to the named product or service in its individual comparison market. Scorecard references include DNAnexus and DNAnexus Precision Health Data Cloud.

DOCEREE

Integrated market-intelligence coverage: startup/scaleup watchlist: 26 — Commercial analytics, CRM, launch and field-force intelligence.

It appears on the startup/scaleup watchlist in Category 26 because programmatic healthcare professional engagement and identity infrastructure may strengthen digital channel orchestration. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

DOMINO DATA LAB

Black Book category coverage: 27 — AI governance, model validation, MLOps, cybersecurity and controlled deployment.

Domino Data Lab is represented in Black Book Category 27 within the AI governance, model validation, MLOps, cybersecurity and controlled deployment market. Its category-relevant capability and application scope includes model inventory, risk classification, monitoring, change control, validation, security, privacy and regulated AI operations.

DOT COMPLIANCE

Black Book category coverage: 23 — Predictive quality, deviations, CAPA, batch review and validation intelligence. Integrated market-intelligence coverage: startup/scaleup watchlist: 23 — Predictive quality, deviations, CAPA, batch review and validation intelligence.

Dot Compliance is represented in Black Book Category 23 within the Predictive quality, deviations, CAPA, batch review and validation intelligence market. Its category-relevant capability and application scope includes quality management, deviation triage, root cause, CAPA, validation, document review, inspection readiness and release support. It appears on the startup/scaleup watchlist in Category 23 because cloud-native eQMS and validation automation target faster implementation for growth-stage regulated companies.

E2OPEN

Black Book category coverage: 24A — Supply planning, demand forecasting, inventory and resilience.

e2open is represented in Black Book Category 24A within the Supply planning, demand forecasting, inventory and resilience market. Its category-relevant capability and application scope includes network planning, demand sensing, launch readiness, inventory, shortage risk, supplier visibility and scenario optimization.

ECLINICAL SOLUTIONS

Black Book category coverage: 10 — Clinical data review, RBQM and automated trial-quality intelligence.

eClinical Solutions is represented in Black Book Category 10 within the Clinical data review, RBQM and automated trial-quality intelligence market. Its category-relevant capability and application scope includes central monitoring, anomaly detection, risk-based quality management, data review, query management and quality signals.

ELSEVIER (SCIBITE)

Black Book category coverage: 5 — Scientific literature, patent and knowledge mining.

Elsevier (SciBite) is represented in Black Book Category 5 within the Scientific literature, patent and knowledge mining market. Its category-relevant capability and application scope includes nLP, semantic search, evidence synthesis, patent intelligence, competitive landscapes and scientific knowledge graphs. Scorecard references include Elsevier SciBite.

EMERSON

Black Book category coverage: 21 — Process development, formulation, scale-up and technology transfer; 22 — GxP smart manufacturing, MES, digital twins and advanced process control.

Emerson is represented across 2 Black Book scorecards within the development & manufacturing domain. The category-relevant applications include process development, formulation and technology transfer and GxP manufacturing, MES and advanced process control. Each performance result remains tied to the named product or service in its individual comparison market.

EMPATICA

Black Book category coverage: 11 — Digital biomarkers, connected devices and remote trial monitoring. Integrated market-intelligence coverage: startup/scaleup watchlist: 11 — Digital biomarkers, connected devices and remote trial monitoring.

Empatica is represented in Black Book Category 11 within the Digital biomarkers, connected devices and remote trial monitoring market. Its category-relevant capability and application scope includes wearables, sensors, digital endpoints, remote measurement, participant adherence and regulatory-grade signal processing. It appears on the startup/scaleup watchlist in Category 11 because medical-grade wearables and validated physiological sensing offer strong foundations for decentralized and digital-biomarker studies.

ENNOV

Black Book category coverage: 15 — Pharmacovigilance and safety-signal intelligence; 16 — Regulatory intelligence, RIM and submission-content automation. Integrated market-intelligence coverage: dark-horse challenger: 15 — Pharmacovigilance and safety-signal intelligence.

Ennov is represented across 2 Black Book scorecards within the safety & regulatory domain. The category-relevant applications include pharmacovigilance and safety-signal operations and regulatory information, authoring and submission operations. Each performance result remains tied to the named product or service in its individual comparison market. The integrated report also profiles Ennov as a dark-horse challenger in Category 15, where integrated safety, regulatory and quality applications can appeal to midmarket life-sciences organizations seeking a unified platform.

ENVISION PHARMA GROUP

Black Book category coverage: 25 — Medical affairs, scientific engagement and omnichannel content intelligence. Integrated market-intelligence coverage: dark-horse challenger: 25 — Medical affairs, scientific engagement and omnichannel content intelligence.

Envision Pharma Group is represented in Black Book Category 25 within the Medical affairs, scientific engagement and omnichannel content intelligence market. Its category-relevant capability and application scope includes medical strategy, evidence dissemination, publications, congresses, MSL insights, compliant content and stakeholder engagement. The integrated report also profiles Envision Pharma Group as a dark-horse challenger in Category 25, where scientific communications, publications and technology services create an integrated alternative for medical-affairs teams.

EPAM

Black Book category coverage: 28 — Life-sciences AI consulting, systems integration and managed services. Integrated market-intelligence coverage: dark-horse challenger: 28 — Life-sciences AI consulting, systems integration and managed services.

EPAM is represented in Black Book Category 28 within the Life-sciences AI consulting, systems integration and managed services market. Its category-relevant capability and application scope includes strategy, operating model, implementation, integration, data engineering, validation, change management and managed delivery. The integrated report also profiles EPAM as a dark-horse challenger in Category 28, where strong product engineering and cloud capabilities can differentiate complex scientific and regulated platform implementations.

ETQ

Black Book category coverage: 23 — Predictive quality, deviations, CAPA, batch review and validation intelligence. Integrated market-intelligence coverage: dark-horse challenger: 23 — Predictive quality, deviations, CAPA, batch review and validation intelligence.

ETQ is represented in Black Book Category 23 within the Predictive quality, deviations, CAPA, batch review and validation intelligence market. Its category-relevant capability and application scope includes quality management, deviation triage, root cause, CAPA, validation, document review, inspection readiness and release support. The integrated report also profiles ETQ as a dark-horse challenger in Category 23, where configurable quality management and analytics offer a credible cross-industry alternative for regulated manufacturers.

EVERSANA

Black Book category coverage: 14 — HEOR, market access, pricing and evidence strategy technology/services; 25 — Medical affairs, scientific engagement and omnichannel content intelligence; 26 — Commercial analytics, CRM, launch and field-force intelligence.

EVERSANA is represented across 3 Black Book scorecards spanning evidence & market access, medical & external engagement, and commercial operations. The category-relevant applications include HEOR, market access, pricing and evidence strategy, medical affairs, scientific engagement and content intelligence, and commercial analytics, CRM, launch and field execution. Each performance result remains tied to the named product or service in its individual comparison market.

EVIDATION

Black Book category coverage: 11 — Digital biomarkers, connected devices and remote trial monitoring. Integrated market-intelligence coverage: dark-horse challenger: 11 — Digital biomarkers, connected devices and remote trial monitoring.

Evidation is represented in Black Book Category 11 within the Digital biomarkers, connected devices and remote trial monitoring market. Its category-relevant capability and application scope includes wearables, sensors, digital endpoints, remote measurement, participant adherence and regulatory-grade signal processing. The integrated report also profiles Evidation as a dark-horse challenger in Category 11, where direct-to-participant data collection and longitudinal research capabilities connect digital measures with broader real-world evidence programs.

EVIDENTIQ

Black Book category coverage: 9 — eClinical and decentralized trial execution. Integrated market-intelligence coverage: dark-horse challenger: 9 — eClinical and decentralized trial execution.

EvidentIQ is represented in Black Book Category 9 within the eClinical and decentralized trial execution market. Its category-relevant capability and application scope includes cTMS, EDC, eSource, eConsent, eCOA, eTMF, IRT and decentralized/hybrid-trial technology and services. Scorecard references include EvidentIQ (Clindex). The integrated report also profiles EvidentIQ as a dark-horse challenger in Category 9, where a modular eClinical platform and services model can appeal to smaller sponsors and CROs seeking configurable execution support.

EVOTEC

Black Book category coverage: 1 — AI drug target discovery and pathway modeling.

Evotec is represented in Black Book Category 1 within the AI drug target discovery and pathway modeling market. Its category-relevant capability and application scope includes target identification, causal biology, disease networks, pathway prioritization and sponsor-partner execution.

EXEEVO

Black Book category coverage: 26 — Commercial analytics, CRM, launch and field-force intelligence. Integrated market-intelligence coverage: dark-horse challenger: 26 — Commercial analytics, CRM, launch and field-force intelligence.

Exeevo is represented in Black Book Category 26 within the Commercial analytics, CRM, launch and field-force intelligence market. Its category-relevant capability and application scope includes life-sciences CRM, next-best action, customer intelligence, territory, launch, forecasting, omnichannel and field execution. The integrated report also profiles Exeevo as a dark-horse challenger in Category 26, where a life-sciences customer experience platform offers a focused CRM and omnichannel option for organizations seeking industry-specific workflows.

EXPERT.AI

Black Book category coverage: 5 — Scientific literature, patent and knowledge mining.

expert.ai is represented in Black Book Category 5 within the Scientific literature, patent and knowledge mining market. Its category-relevant capability and application scope includes nLP, semantic search, evidence synthesis, patent intelligence, competitive landscapes and scientific knowledge graphs.

EXTEDO

Black Book category coverage: 15 — Pharmacovigilance and safety-signal intelligence; 16 — Regulatory intelligence, RIM and submission-content automation.

EXTEDO is represented across 2 Black Book scorecards within the safety & regulatory domain. The category-relevant applications include pharmacovigilance and safety-signal operations and regulatory information, authoring and submission operations. Each performance result remains tied to the named product or service in its individual comparison market.

FABRIC GENOMICS

Black Book category coverage: 18 — Genomics, bioinformatics and precision-medicine workflow platforms. Integrated market-intelligence coverage: dark-horse challenger: 18 — Genomics, bioinformatics and precision-medicine workflow platforms.

Fabric Genomics is represented in Black Book Category 18 within the Genomics, bioinformatics and precision-medicine workflow platforms market. Its category-relevant capability and application scope includes genomic analysis, variant interpretation, multi-omics workflows, secure collaboration and clinical/translational bioinformatics. The integrated report also profiles Fabric Genomics as a dark-horse challenger in Category 18, where automated interpretation and clinical decision support provide a focused precision-medicine alternative to broad omics platforms.

FARO HEALTH

Integrated market-intelligence coverage: startup/scaleup watchlist: 7 — Protocol design, feasibility and trial simulation.

It appears on the startup/scaleup watchlist in Category 7 because structured protocol design and operational modeling target amendment risk, complexity and feasibility before study launch. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

FIDDLER AI

Black Book category coverage: 27 — AI governance, model validation, MLOps, cybersecurity and controlled deployment. Integrated market-intelligence coverage: dark-horse challenger: 27 — AI governance, model validation, MLOps, cybersecurity and controlled deployment.

Fiddler AI is represented in Black Book Category 27 within the AI governance, model validation, MLOps, cybersecurity and controlled deployment market. Its category-relevant capability and application scope includes model inventory, risk classification, monitoring, change control, validation, security, privacy and regulated AI operations. The integrated report also profiles Fiddler AI as a dark-horse challenger in Category 27, where explainability and monitoring capabilities are relevant where regulated teams need transparent model risk controls.

FLATIRON HEALTH

Black Book category coverage: 4 — Biomarker, multi-omics and precision-research intelligence; 12 — AI-enabled self-service RWE analytics and cohort intelligence; 13 — RWD networks, linkage, tokenization and external controls. Integrated market-intelligence coverage: dark-horse challenger: 4 — Biomarker, multi-omics and precision-research intelligence; 12 — AI-enabled self-service RWE analytics and cohort intelligence.

Flatiron Health is represented across 3 Black Book scorecards spanning discovery & preclinical and evidence & market access. The category-relevant applications include biomarker and multi-omics analysis, self-service real-world evidence analytics, and real-world data linkage, tokenization and external controls. Each performance result remains tied to the named product or service in its individual comparison market. The integrated report also profiles Flatiron Health as a dark-horse challenger in Category 4, where deep oncology data and clinical abstraction create an underappreciated foundation for biomarker validation and stratification. It receives dark-horse monitoring in 2 categories overall.

GENERATE BIOMEDICINES

Black Book category coverage: 3 — AI protein, antibody and biologics design.

Generate Biomedicines is represented in Black Book Category 3 within the AI protein, antibody and biologics design market. Its category-relevant capability and application scope includes protein engineering, antibody design, affinity and developability prediction, immunogenicity and multimodal biologics optimization.

GENERIS

Black Book category coverage: 16 — Regulatory intelligence, RIM and submission-content automation. Integrated market-intelligence coverage: dark-horse challenger: 16 — Regulatory intelligence, RIM and submission-content automation.

Generis is represented in Black Book Category 16 within the Regulatory intelligence, RIM and submission-content automation market. Its category-relevant capability and application scope includes regulatory information management, publishing, authoring, content reuse, health-authority intelligence and submission operations. The integrated report also profiles Generis as a dark-horse challenger in Category 16, where a configurable RIM platform and content model can serve sponsors seeking flexibility across regulatory information and submission operations.

GENESIS RESEARCH

Integrated market-intelligence coverage: startup/scaleup watchlist: 14 — HEOR, market access, pricing and evidence strategy technology/services.

It appears on the startup/scaleup watchlist in Category 14 because technology-enabled RWE and HEOR services target faster evidence planning, analysis and communication. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

GENESIS THERAPEUTICS

Black Book category coverage: 2 — Generative small-molecule design and optimization. Integrated market-intelligence coverage: dark-horse challenger: 2 — Generative small-molecule design and optimization.

Genesis Therapeutics is represented in Black Book Category 2 within the Generative small-molecule design and optimization market. Its category-relevant capability and application scope includes molecular generation, virtual screening, medicinal chemistry optimization, ADMET prediction and design-make-test-learn acceleration. The integrated report also profiles Genesis Therapeutics as a dark-horse challenger in Category 2, where graph-based molecular design and partnership-oriented deployment give it upside where sponsors need high-touch computational chemistry collaboration.

GOLDEN HELIX

Black Book category coverage: 18 — Genomics, bioinformatics and precision-medicine workflow platforms.

Golden Helix is represented in Black Book Category 18 within the Genomics, bioinformatics and precision-medicine workflow platforms market. Its category-relevant capability and application scope includes genomic analysis, variant interpretation, multi-omics workflows, secure collaboration and clinical/translational bioinformatics.

H1

Integrated market-intelligence coverage: startup/scaleup watchlist: 25 — Medical affairs, scientific engagement and omnichannel content intelligence.

It appears on the startup/scaleup watchlist in Category 25 because healthcare professional, trial and scientific-network intelligence can support expert identification, engagement planning and medical strategy. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

HEALTH CATALYST

Black Book category coverage: 17 — AI-ready clinical and translational data operating platforms. Integrated market-intelligence coverage: dark-horse challenger: 17 — AI-ready clinical and translational data operating platforms.

Health Catalyst is represented in Black Book Category 17 within the AI-ready clinical and translational data operating platforms market. Its category-relevant capability and application scope includes multimodal ingestion, semantic harmonization, validation, interoperability, cohort tools, governance and AI-ready customer-controlled data. Scorecard references include Health Catalyst Ignite. The integrated report also profiles Health Catalyst as a dark-horse challenger in Category 17, where healthcare-specific data models, analytics and governance provide a practical bridge from operational data to research-ready assets.

HEALTHVERITY

Black Book category coverage: 12 — AI-enabled self-service RWE analytics and cohort intelligence; 13 — RWD networks, linkage, tokenization and external controls.

HealthVerity is represented across 2 Black Book scorecards within the evidence & market access domain. The category-relevant applications include self-service real-world evidence analytics and real-world data linkage, tokenization and external controls. Each performance result remains tied to the named product or service in its individual comparison market.

HOLISTIC AI

Integrated market-intelligence coverage: startup/scaleup watchlist: 27 — AI governance, model validation, MLOps, cybersecurity and controlled deployment.

It appears on the startup/scaleup watchlist in Category 27 because AI risk, compliance and testing capabilities provide a broad governance option for multinational organizations. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

HONEYWELL

Black Book category coverage: 22 — GxP smart manufacturing, MES, digital twins and advanced process control; 23 — Predictive quality, deviations, CAPA, batch review and validation intelligence.

Honeywell is represented across 2 Black Book scorecards spanning development & manufacturing and quality & validation. The category-relevant applications include GxP manufacturing, MES and advanced process control and quality, deviations, CAPA, validation and batch review. Each performance result remains tied to the named product or service in its individual comparison market. Scorecard references include Honeywell and Honeywell TrackWise.

IBEX MEDICAL ANALYTICS

Black Book category coverage: 19 — Digital pathology, imaging AI and companion-diagnostic development. **Integrated market-intelligence coverage:** startup/scaleup watchlist: 19 — Digital pathology, imaging AI and companion-diagnostic development.

Ibex Medical Analytics is represented in Black Book Category 19 within the Digital pathology, imaging AI and companion-diagnostic development market. Its category-relevant capability and application scope includes pathology and imaging workflow AI, quantitative biomarkers, companion diagnostics, validation and clinical-research integration. It appears on the startup/scaleup watchlist in Category 19 because clinical-grade pathology AI and deployment experience create potential for translational and companion-diagnostic expansion.

IKTOS

Black Book category coverage: 2 — Generative small-molecule design and optimization. **Integrated market-intelligence coverage:** dark-horse challenger: 2 — Generative small-molecule design and optimization.

Iktos is represented in Black Book Category 2 within the Generative small-molecule design and optimization market. Its category-relevant capability and application scope includes molecular generation, virtual screening, medicinal chemistry optimization, ADMET prediction and design-make-test-learn acceleration. The integrated report also profiles Iktos as a dark-horse challenger in Category 2, where integrated generative design, retrosynthesis and chemistry automation make it a strong specialist challenger for design-make-test-learn workflows.

ILLUMINA

Black Book category coverage: 4 — Biomarker, multi-omics and precision-research intelligence; 18 — Genomics, bioinformatics and precision-medicine workflow platforms.

Illumina is represented across 2 Black Book scorecards spanning discovery & preclinical and data & diagnostics. The category-relevant applications include biomarker and multi-omics analysis and genomics, bioinformatics and precision-medicine workflows. Each performance result remains tied to the named product or service in its individual comparison market. Scorecard references include Illumina and Illumina Connected Analytics.

IMMUNAI

Integrated market-intelligence coverage: startup/scaleup watchlist: 1 — AI drug target discovery and pathway modeling.

It appears on the startup/scaleup watchlist in Category 1 because builds an immune-system data and analytics platform that could convert immune-state mapping into target and biomarker programs. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

INDEGENE

Black Book category coverage: 15 — Pharmacovigilance and safety-signal intelligence; 25 — Medical affairs, scientific engagement and omnichannel content intelligence; 26 — Commercial analytics, CRM, launch and field-force intelligence.

Indegene is represented across 3 Black Book scorecards spanning safety & regulatory, medical & external engagement, and commercial operations. The category-relevant applications include pharmacovigilance and safety-signal operations, medical affairs, scientific engagement and content intelligence, and commercial analytics, CRM, launch and field execution. Each performance result remains tied to the named product or service in its individual comparison market.

INFOSYS

Black Book category coverage: 28 — Life-sciences AI consulting, systems integration and managed services.

Infosys is represented in Black Book Category 28 within the Life-sciences AI consulting, systems integration and managed services market. Its category-relevant capability and application scope includes strategy, operating model, implementation, integration, data engineering, validation, change management and managed delivery.

INNOVACER

Black Book category coverage: 17 — AI-ready clinical and translational data operating platforms.

Innovaccer is represented in Black Book Category 17 within the AI-ready clinical and translational data operating platforms market. Its category-relevant capability and application scope includes multimodal ingestion, semantic harmonization, validation, interoperability, cohort tools, governance and AI-ready customer-controlled data. Scorecard references include Innovaccer Gravity.

INSILICO MEDICINE

Black Book category coverage: 1 — AI drug target discovery and pathway modeling; 2 — Generative small-molecule design and optimization.

Insilico Medicine is represented across 2 Black Book scorecards within the discovery & preclinical domain. The category-relevant applications include target discovery and generative chemistry and molecular optimization. Each performance result remains tied to the named product or service in its individual comparison market.

INSILICOTRIALS

Black Book category coverage: 6 — Digital twins, biosimulation and in silico development. Integrated market-intelligence coverage: dark-horse challenger: 6 — Digital twins, biosimulation and in silico development.

InSilicoTrials is represented in Black Book Category 6 within the Digital twins, biosimulation and in silico development market. Its category-relevant capability and application scope includes quantitative systems pharmacology, virtual populations, disease progression, synthetic control and trial simulation. The integrated report also profiles InSilicoTrials as a dark-horse challenger in Category 6, where a marketplace and orchestration model for simulation tools can broaden access to in silico methods across development teams.

INSTEM

Black Book category coverage: 16 — Regulatory intelligence, RIM and submission-content automation.

Instem is represented in Black Book Category 16 within the Regulatory intelligence, RIM and submission-content automation market. Its category-relevant capability and application scope includes regulatory information management, publishing, authoring, content reuse, health-authority intelligence and submission operations.

INTERSYSTEMS

Black Book category coverage: 17 — AI-ready clinical and translational data operating platforms.

InterSystems is represented in Black Book Category 17 within the AI-ready clinical and translational data operating platforms market. Its category-relevant capability and application scope includes multimodal ingestion, semantic harmonization, validation, interoperability, cohort tools, governance and AI-ready customer-controlled data. Scorecard references include InterSystems IRIS for Health / HealthShare.

IQVIA

Black Book category coverage: 5 — Scientific literature, patent and knowledge mining; 7 — Protocol design, feasibility and trial simulation; 8 — Trial site selection, recruitment and patient matching; 9 — eClinical and decentralized trial execution; 12 — AI-enabled self-service RWE analytics and cohort intelligence; 13 — RWD networks, linkage, tokenization and external controls; 14 — HEOR, market access, pricing and evidence strategy technology/services; 15 — Pharmacovigilance and safety-signal intelligence; 16 — Regulatory intelligence, RIM and submission-content automation; 25 — Medical affairs, scientific engagement and omnichannel content intelligence; 26 — Commercial analytics, CRM, launch and field-force intelligence.

IQVIA is represented across 11 Black Book scorecards spanning discovery & preclinical, clinical development, evidence & market access, safety & regulatory, medical & external engagement, and commercial operations. The category-relevant applications include scientific, literature and patent intelligence, protocol design, feasibility and trial simulation, site selection, patient matching and recruitment, eClinical and decentralized-trial execution, self-service real-world evidence analytics, real-world data linkage, tokenization and external controls, HEOR, market access, pricing and evidence strategy, pharmacovigilance and safety-signal operations, regulatory information, authoring and submission operations, medical affairs, scientific engagement and content intelligence, and commercial analytics, CRM, launch and field execution. Each performance result remains tied to the named product or service in its individual comparison market. Scorecard references include IQVIA and IQVIA Linguamatics.

IRIS.AI

Integrated market-intelligence coverage: startup/scaleup watchlist: 5 — Scientific literature, patent and knowledge mining.

It appears on the startup/scaleup watchlist in Category 5 because research-document discovery and extraction tools may fit smaller teams seeking rapid evidence maps without a large informatics program. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

ISOMORPHIC LABS

Black Book category coverage: 1 — AI drug target discovery and pathway modeling; 3 — AI protein, antibody and biologics design.

Isomorphic Labs is represented across 2 Black Book scorecards within the discovery & preclinical domain. The category-relevant applications include target discovery and protein, antibody and biologics design. Each performance result remains tied to the named product or service in its individual comparison market.

IXICO

Black Book category coverage: 11 — Digital biomarkers, connected devices and remote trial monitoring.

IXICO is represented in Black Book Category 11 within the Digital biomarkers, connected devices and remote trial monitoring market. Its category-relevant capability and application scope includes wearables, sensors, digital endpoints, remote measurement, participant adherence and regulatory-grade signal processing.

JEEVA CLINICAL TRIALS

Integrated market-intelligence coverage: startup/scaleup watchlist: 9 — eClinical and decentralized trial execution.

It appears on the startup/scaleup watchlist in Category 9 because a unified digital trial platform aims to simplify remote participation for smaller research teams and diverse populations. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

KETRYX

Integrated market-intelligence coverage: startup/scaleup watchlist: 23 — Predictive quality, deviations, CAPA, batch review and validation intelligence.

It appears on the startup/scaleup watchlist in Category 23 because continuous compliance and traceability for software-enabled products create a differentiated quality and validation niche. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

KINAXIS

Black Book category coverage: 24A — Supply planning, demand forecasting, inventory and resilience.

Kinaxis is represented in Black Book Category 24A within the Supply planning, demand forecasting, inventory and resilience market. Its category-relevant capability and application scope includes network planning, demand sensing, launch readiness, inventory, shortage risk, supplier visibility and scenario optimization.

KOMODO HEALTH

Black Book category coverage: 12 — AI-enabled self-service RWE analytics and cohort intelligence; 13 — RWD networks, linkage, tokenization and external controls. Integrated market-intelligence coverage: dark-horse challenger: 12 — AI-enabled self-service RWE analytics and cohort intelligence; 13 — RWD networks, linkage, tokenization and external controls.

Komodo Health is represented across 2 Black Book scorecards within the evidence & market access domain. The category-relevant applications include self-service real-world evidence analytics and real-world data linkage, tokenization and external controls. Each performance result remains tied to the named product or service in its individual comparison market. The integrated report also profiles Komodo Health as a dark-horse challenger in Category 12, where a large healthcare map and analytics environment can support cohort exploration and evidence workflows beyond its better-known commercial use cases. It receives dark-horse monitoring in 2 categories overall.

KONEKSA

Black Book category coverage: 11 — Digital biomarkers, connected devices and remote trial monitoring. Integrated market-intelligence coverage: startup/scaleup watchlist: 11 — Digital biomarkers, connected devices and remote trial monitoring.

Koneksa is represented in Black Book Category 11 within the Digital biomarkers, connected devices and remote trial monitoring market. Its category-relevant capability and application scope includes wearables, sensors, digital endpoints, remote measurement, participant adherence and regulatory-grade signal processing. It appears on the startup/scaleup watchlist in Category 11 because digital-measure development, device integration and evidence services make it a scaleup to watch for regulated endpoints.

KÖRBER PHARMA

Black Book category coverage: 21 — Process development, formulation, scale-up and technology transfer; 22 — GxP smart manufacturing, MES, digital twins and advanced process control; 23 — Predictive quality, deviations, CAPA, batch review and validation intelligence.

Körber Pharma is represented across 3 Black Book scorecards spanning development & manufacturing and quality & validation. The category-relevant applications include process development, formulation and technology transfer, GxP manufacturing, MES and advanced process control, and quality, deviations, CAPA, validation and batch review. Each performance result remains tied to the named product or service in its individual comparison market.

LABGENIUS

Black Book category coverage: 3 — AI protein, antibody and biologics design. Integrated market-intelligence coverage: dark-horse challenger: 3 — AI protein, antibody and biologics design.

LabGenius is represented in Black Book Category 3 within the AI protein, antibody and biologics design market. Its category-relevant capability and application scope includes protein engineering, antibody design, affinity and developability prediction, immunogenicity and multimodal biologics optimization. The integrated report also profiles LabGenius as a dark-horse challenger in Category 3, where closed-loop experimental learning for antibody discovery offers stronger wet-lab integration than many design-only competitors.

LABVANTAGE

Black Book category coverage: 20 — Laboratory informatics, scientific data and autonomous-lab enablement. Integrated market-intelligence coverage: dark-horse challenger: 20 — Laboratory informatics, scientific data and autonomous-lab enablement.

LabVantage is represented in Black Book Category 20 within the Laboratory informatics, scientific data and autonomous-lab enablement market. Its category-relevant capability and application scope includes LIMS, ELN, SDMS, instrument integration, scientific data clouds, lab automation and experiment orchestration. The integrated report also profiles LabVantage as a dark-horse challenger in Category 20, where broad LIMS and laboratory workflow capabilities give it a credible platform position beyond traditional sample management.

LABWARE

Black Book category coverage: 20 — Laboratory informatics, scientific data and autonomous-lab enablement.

LabWare is represented in Black Book Category 20 within the Laboratory informatics, scientific data and autonomous-lab enablement market. Its category-relevant capability and application scope includes LIMS, ELN, SDMS, instrument integration, scientific data clouds, lab automation and experiment orchestration.

LEASH BIOSCIENCES

Integrated market-intelligence coverage: startup/scaleup watchlist: 2 — Generative small-molecule design and optimization.

It appears on the startup/scaleup watchlist in Category 2 because builds large experimental binding datasets and foundation models; prospective wet-lab hit rates will determine competitive standing. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

LIFEBIT

Black Book category coverage: 18 — Genomics, bioinformatics and precision-medicine workflow platforms. Integrated market-intelligence coverage: dark-horse challenger: 18 — Genomics, bioinformatics and precision-medicine workflow platforms | startup/scaleup watchlist: 18 — Genomics, bioinformatics and precision-medicine workflow platforms.

Lifebit is represented in Black Book Category 18 within the Genomics, bioinformatics and precision-medicine workflow platforms market. Its category-relevant capability and application scope includes genomic analysis, variant interpretation, multi-omics workflows, secure collaboration and clinical/translational bioinformatics. The integrated report also profiles Lifebit as a dark-horse challenger in Category 18, where federated analysis and secure data collaboration are differentiated where genomic data cannot be centralized. It appears on the startup/scaleup watchlist in Category 18 because a federated architecture and national-scale data programs make it a private scaleup to watch in secure research collaboration.

LINDUS HEALTH

Integrated market-intelligence coverage: startup/scaleup watchlist: 9 — eClinical and decentralized trial execution.

It appears on the startup/scaleup watchlist in Category 9 because a technology-enabled CRO model combines software and execution, making it a scaleup to watch for end-to-end trial delivery. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

LOGILITY

Black Book category coverage: 24A — Supply planning, demand forecasting, inventory and resilience. Integrated market-intelligence coverage: dark-horse challenger: 24A — Supply planning, demand forecasting, inventory and resilience.

Logility is represented in Black Book Category 24A within the Supply planning, demand forecasting, inventory and resilience market. Its category-relevant capability and application scope includes network planning, demand sensing, launch readiness, inventory, shortage risk, supplier visibility and scenario optimization. The integrated report also profiles Logility as a dark-horse challenger in Category 24A, where demand and inventory optimization provide a focused alternative for organizations that do not require the broadest enterprise-planning suite.

LOKAD

Integrated market-intelligence coverage: startup/scaleup watchlist: 24A — Supply planning, demand forecasting, inventory and resilience.

It appears on the startup/scaleup watchlist in Category 24A because probabilistic forecasting and quantitative supply-chain optimization provide a specialized alternative to conventional planning suites. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

LOKAVANT

Black Book category coverage: 7 — Protocol design, feasibility and trial simulation; 10 — Clinical data review, RBQM and automated trial-quality intelligence. **Integrated market-intelligence coverage:** dark-horse challenger: 7 — Protocol design, feasibility and trial simulation; 10 — Clinical data review, RBQM and automated trial-quality intelligence.

Lokavant is represented across 2 Black Book scorecards within the clinical development domain. The category-relevant applications include protocol design, feasibility and trial simulation and clinical data review and risk-based quality management. Each performance result remains tied to the named product or service in its individual comparison market. The integrated report also profiles Lokavant as a dark-horse challenger in Category 7, where study intelligence and predictive operational analytics can improve protocol and execution decisions using cross-study performance data. It receives dark-horse monitoring in 2 categories overall.

LORENZ

Black Book category coverage: 16 — Regulatory intelligence, RIM and submission-content automation. **Integrated market-intelligence coverage:** dark-horse challenger: 16 — Regulatory intelligence, RIM and submission-content automation.

LORENZ is represented in Black Book Category 16 within the Regulatory intelligence, RIM and submission-content automation market. Its category-relevant capability and application scope includes regulatory information management, publishing, authoring, content reuse, health-authority intelligence and submission operations. The integrated report also profiles LORENZ as a dark-horse challenger in Category 16, where longstanding publishing and submission-management depth remains relevant for organizations prioritizing operational reliability and regional coverage.

LUNIT

Black Book category coverage: 19 — Digital pathology, imaging AI and companion-diagnostic development. **Integrated market-intelligence coverage:** dark-horse challenger: 19 — Digital pathology, imaging AI and companion-diagnostic development.

Lunit is represented in Black Book Category 19 within the Digital pathology, imaging AI and companion-diagnostic development market. Its category-relevant capability and application scope includes pathology and imaging workflow AI, quantitative biomarkers, companion diagnostics, validation and clinical-research integration. The integrated report also profiles Lunit as a dark-horse challenger in Category 19, where strong imaging-AI heritage and oncology focus create potential across radiology-pathology convergence and companion-diagnostic research.

LYNXCARE

Integrated market-intelligence coverage: startup/scaleup watchlist: 12 — AI-enabled self-service RWE analytics and cohort intelligence; 17 — AI-ready clinical and translational data operating platforms.

It appears on the startup/scaleup watchlist in Category 12 because clinical-data extraction and research infrastructure offer a pathway from health-system records to governed RWE cohorts. It is monitored in 2 startup/scaleup category profiles overall. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

MasterControl

Black Book category coverage: 23 — Predictive quality, deviations, CAPA, batch review and validation intelligence.

MasterControl is represented in Black Book Category 23 within the Predictive quality, deviations, CAPA, batch review and validation intelligence market. Its category-relevant capability and application scope includes quality management, deviation triage, root cause, CAPA, validation, document review, inspection readiness and release support.

MEDABLE

Black Book category coverage: 9 — eClinical and decentralized trial execution; 11 — Digital biomarkers, connected devices and remote trial monitoring.

Medable is represented across 2 Black Book scorecards within the clinical development domain. The category-relevant applications include eClinical and decentralized-trial execution and digital biomarkers, connected devices and remote monitoring. Each performance result remains tied to the named product or service in its individual comparison market.

MEDIDATA

Black Book category coverage: 7 — Protocol design, feasibility and trial simulation; 8 — Trial site selection, recruitment and patient matching; 9 — eClinical and decentralized trial execution; 10 — Clinical data review, RBQM and automated trial-quality intelligence; 11 — Digital biomarkers, connected devices and remote trial monitoring.

Medidata is represented across 5 Black Book scorecards within the clinical development domain. The category-relevant applications include protocol design, feasibility and trial simulation, site selection, patient matching and recruitment, eClinical and decentralized-trial execution, clinical data review and risk-based quality management, and digital biomarkers, connected devices and remote monitoring. Each performance result remains tied to the named product or service in its individual comparison market. Scorecard references include Medidata and Medidata Sensor Cloud.

MEDRIO

Black Book category coverage: 9 — eClinical and decentralized trial execution; 10 — Clinical data review, RBQM and automated trial-quality intelligence. **Integrated market-intelligence coverage:** dark-horse challenger: 9 — eClinical and decentralized trial execution.

Medrio is represented across 2 Black Book scorecards within the clinical development domain. The category-relevant applications include eClinical and decentralized-trial execution and clinical data review and risk-based quality management. Each performance result remains tied to the named product or service in its individual comparison market. The integrated report also profiles Medrio as a dark-horse challenger in Category 9, where integrated EDC, eConsent and ePRO tools give emerging biopharma and device sponsors a focused alternative with faster deployment.

MENDEL AI

Integrated market-intelligence coverage: startup/scaleup watchlist: 17 — AI-ready clinical and translational data operating platforms.

It appears on the startup/scaleup watchlist in Category 17 because clinical natural-language processing and research intelligence can convert fragmented records into structured, queryable evidence. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

MERATIVE

Black Book category coverage: 10 — Clinical data review, RBQM and automated trial-quality intelligence. **Integrated market-intelligence coverage:** dark-horse challenger: 10 — Clinical data review, RBQM and automated trial-quality intelligence.

Merative is represented in Black Book Category 10 within the Clinical data review, RBQM and automated trial-quality intelligence market. Its category-relevant capability and application scope includes central monitoring, anomaly detection, risk-based quality management, data review, query management and quality signals. Scorecard references include Merative (Zelta). The integrated report also profiles Merative as a dark-horse challenger in Category 10, where clinical data management and migration capabilities support its challenger position in complex trial-data operations.

MODEL N

Black Book category coverage: 26 — Commercial analytics, CRM, launch and field-force intelligence. **Integrated market-intelligence coverage:** dark-horse challenger: 26 — Commercial analytics, CRM, launch and field-force intelligence.

Model N is represented in Black Book Category 26 within the Commercial analytics, CRM, launch and field-force intelligence market. Its category-relevant capability and application scope includes life-sciences CRM, next-best action, customer intelligence, territory, launch, forecasting, omnichannel and field execution. The integrated report also profiles Model N as a dark-horse challenger in Category 26, where revenue management, pricing and contracting data can strengthen commercial intelligence where gross-to-net economics drive decisions.

MODELOP

Black Book category coverage: 27 — AI governance, model validation, MLOps, cybersecurity and controlled deployment.

ModelOp is represented in Black Book Category 27 within the AI governance, model validation, MLOps, cybersecurity and controlled deployment market. Its category-relevant capability and application scope includes model inventory, risk classification, monitoring, change control, validation, security, privacy and regulated AI operations.

MONITAUR

Integrated market-intelligence coverage: startup/scaleup watchlist: 27 — AI governance, model validation, MLOps, cybersecurity and controlled deployment.

It appears on the startup/scaleup watchlist in Category 27 because model governance and assurance workflows target regulated decision systems that require structured review and documentation. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

NABLA BIO

Black Book category coverage: 3 — AI protein, antibody and biologics design. **Integrated market-intelligence coverage:** startup/scaleup watchlist: 3 — AI protein, antibody and biologics design.

Nabla Bio is represented in Black Book Category 3 within the AI protein, antibody and biologics design market. Its category-relevant capability and application scope includes protein engineering, antibody design, affinity and developability prediction, immunogenicity and multimodal biologics optimization. It appears on the startup/scaleup watchlist in Category 3 because structure-aware antibody design targets difficult membrane proteins; watch breadth across targets and partner-confirmed developability.

NAVITAS LIFE SCIENCES

Black Book category coverage: 15 — Pharmacovigilance and safety-signal intelligence.

Navitas Life Sciences is represented in Black Book Category 15 within the Pharmacovigilance and safety-signal intelligence market. Its category-relevant capability and application scope includes case intake, duplicate detection, coding, narratives, aggregate reporting, literature surveillance and signal management.

NETTARGETS

Integrated market-intelligence coverage: startup/scaleup watchlist: 1 — AI drug target discovery and pathway modeling.

It appears on the startup/scaleup watchlist in Category 1 because applies network medicine and knowledge-graph methods to target discovery; watch prospective validation and repeat pharmaceutical use. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

NOSTOS GENOMICS

Integrated market-intelligence coverage: startup/scaleup watchlist: 18 — Genomics, bioinformatics and precision-medicine workflow platforms.

It appears on the startup/scaleup watchlist in Category 18 because AI-assisted variant interpretation targets faster diagnosis and lower manual review burden for rare-disease workflows. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

NOVELLIA

Integrated market-intelligence coverage: startup/scaleup watchlist: 13 — RWD networks, linkage, tokenization and external controls.

It appears on the startup/scaleup watchlist in Category 13 because patient-authorized data access and repository technology can create differentiated longitudinal datasets for research and development. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

NUROCOR

Integrated market-intelligence coverage: startup/scaleup watchlist: 10 — Clinical data review, RBQM and automated trial-quality intelligence.

It appears on the startup/scaleup watchlist in Category 10 because clinical data standards and metadata automation could reduce mapping, reconciliation and submission-readiness effort. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

O9 SOLUTIONS

Black Book category coverage: 24A — Supply planning, demand forecasting, inventory and resilience.

O9 Solutions is represented in Black Book Category 24A within the Supply planning, demand forecasting, inventory and resilience market. Its category-relevant capability and application scope includes network planning, demand sensing, launch readiness, inventory, shortage risk, supplier visibility and scenario optimization.

ONTOTEXT

Black Book category coverage: 5 — Scientific literature, patent and knowledge mining. Integrated market-intelligence coverage: dark-horse challenger: 5 — Scientific literature, patent and knowledge mining.

Ontotext is represented in Black Book Category 5 within the Scientific literature, patent and knowledge mining market. Its category-relevant capability and application scope includes nLP, semantic search, evidence synthesis, patent intelligence, competitive landscapes and scientific knowledge graphs. The integrated report also profiles Ontotext as a dark-horse challenger in Category 5, where semantic graphs and ontology-driven knowledge integration are well suited to governed enterprise scientific intelligence.

OPEN HEALTH

Black Book category coverage: 14 — HEOR, market access, pricing and evidence strategy technology/services; 25 — Medical affairs, scientific engagement and omnichannel content intelligence.

OPEN Health is represented across 2 Black Book scorecards spanning evidence & market access and medical & external engagement. The category-relevant applications include HEOR, market access, pricing and evidence strategy and medical affairs, scientific engagement and content intelligence. Each performance result remains tied to the named product or service in its individual comparison market.

OPTUM LIFE SCIENCES

Black Book category coverage: 12 — AI-enabled self-service RWE analytics and cohort intelligence; 13 — RWD networks, linkage, tokenization and external controls.

Optum Life Sciences is represented across 2 Black Book scorecards within the evidence & market access domain. The category-relevant applications include self-service real-world evidence analytics and real-world data linkage, tokenization and external controls. Each performance result remains tied to the named product or service in its individual comparison market.

ORACLE

Black Book category coverage: 7 — Protocol design, feasibility and trial simulation; 8 — Trial site selection, recruitment and patient matching; 9 — eClinical and decentralized trial execution; 10 — Clinical data review, RBQM and automated trial-quality intelligence; 12 — AI-enabled self-service RWE analytics and cohort intelligence; 13 — RWD networks, linkage, tokenization and external controls; 15 — Pharmacovigilance and safety-signal intelligence; 17 — AI-ready clinical and translational data operating platforms; 24A — Supply planning, demand forecasting, inventory and resilience.

Oracle is represented across 9 Black Book scorecards spanning clinical development, evidence & market access, safety & regulatory, data foundation, and supply chain. The category-relevant applications include protocol design, feasibility and trial simulation, site selection, patient matching and recruitment, eClinical and decentralized-trial execution, clinical data review and risk-based quality management, self-service real-world evidence analytics, real-world data linkage, tokenization and external controls, pharmacovigilance and safety-signal operations, AI-ready clinical and translational data operations, and supply planning, demand forecasting, inventory and resilience. Each performance result remains tied to the named product or service in its individual comparison market. Scorecard references include Oracle Clinical One, Oracle Health / Life Sciences AI Data Platform, Oracle Life Sciences, and Oracle SCM.

OWKIN

Black Book category coverage: 1 — AI drug target discovery and pathway modeling; 4 — Biomarker, multi-omics and precision-research intelligence.

Owkin is represented across 2 Black Book scorecards within the discovery & preclinical domain. The category-relevant applications include target discovery and biomarker and multi-omics analysis. Each performance result remains tied to the named product or service in its individual comparison market.

PAIGE

Black Book category coverage: 19 — Digital pathology, imaging AI and companion-diagnostic development. **Integrated market-intelligence coverage:** startup/scaleup watchlist: 19 — Digital pathology, imaging AI and companion-diagnostic development.

Paige is represented in Black Book Category 19 within the Digital pathology, imaging AI and companion-diagnostic development market. Its category-relevant capability and application scope includes pathology and imaging workflow AI, quantitative biomarkers, companion diagnostics, validation and clinical-research integration. It appears on the startup/scaleup watchlist in Category 19 because foundation models and pathology applications position it for research, diagnostic and biomarker partnerships.

PALANTIR

Black Book category coverage: 17 — AI-ready clinical and translational data operating platforms; 27 — AI governance, model validation, MLOps, cybersecurity and controlled deployment. **Integrated market-intelligence coverage:** dark-horse challenger: 17 — AI-ready clinical and translational data operating platforms.

Palantir is represented across 2 Black Book scorecards spanning data foundation and enterprise governance. The category-relevant applications include AI-ready clinical and translational data operations and AI governance, model validation, MLOps and controlled deployment. Each performance result remains tied to the named product or service in its individual comparison market. Scorecard references include Palantir and Palantir Foundry / AIP. The integrated report also profiles Palantir as a dark-horse challenger in Category 17, where strong ontology, integration and controlled AI deployment capabilities can support complex translational-data programs.

PARKOURSC

Black Book category coverage: 24B — Clinical supply, cold chain, serialization and chain-of-identity intelligence. **Integrated market-intelligence coverage:** startup/scaleup watchlist: 24B — Clinical supply, cold chain, serialization and chain-of-identity intelligence.

ParkourSC is represented in Black Book Category 24B within the Clinical supply, cold chain, serialization and chain-of-identity intelligence market. Its category-relevant capability and application scope includes iRT/RTSM, packaging, labeling, temperature, logistics, serialization, cell/gene chain of identity and patient-level traceability. It appears on the startup/scaleup watchlist in Category 24B because supply-network intelligence and risk monitoring target end-to-end visibility for complex life-sciences logistics.

PARTNERS4ACCESS

Integrated market-intelligence coverage: startup/scaleup watchlist: 14 — HEOR, market access, pricing and evidence strategy technology/services.

It appears on the startup/scaleup watchlist in Category 14 because rare-disease and specialty market-access expertise makes it a targeted watchlist firm for complex reimbursement environments. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

PATHAI

Black Book category coverage: 4 — Biomarker, multi-omics and precision-research intelligence; 19 — Digital pathology, imaging AI and companion-diagnostic development.

PathAI is represented across 2 Black Book scorecards spanning discovery & preclinical and data & diagnostics. The category-relevant applications include biomarker and multi-omics analysis and digital pathology, imaging AI and companion diagnostics. Each performance result remains tied to the named product or service in its individual comparison market.

PATSNAP

Black Book category coverage: 5 — Scientific literature, patent and knowledge mining. **Integrated market-intelligence coverage:** dark-horse challenger: 5 — Scientific literature, patent and knowledge mining.

Patsnap is represented in Black Book Category 5 within the Scientific literature, patent and knowledge mining market. Its category-relevant capability and application scope includes nLP, semantic search, evidence synthesis, patent intelligence, competitive landscapes and scientific knowledge graphs. The integrated report also profiles Patsnap as a dark-horse challenger in Category 5, where patent, competitive and scientific intelligence can serve integrated R&D strategy teams that need more than literature search.

PETAURI EVIDENCE

Integrated market-intelligence coverage: startup/scaleup watchlist: 14 — HEOR, market access, pricing and evidence strategy technology/services.

It appears on the startup/scaleup watchlist in Category 14 because a specialist evidence and value organization can challenge larger firms through focused scientific and market-access execution. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

PHARE BIO

Integrated market-intelligence coverage: startup/scaleup watchlist: 2 — Generative small-molecule design and optimization.

It appears on the startup/scaleup watchlist in Category 2 because uses AI-guided discovery for antimicrobial programs; advancement into validated leads and licensed assets is the key scale test. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

PHARMAFORCEIQ

Integrated market-intelligence coverage: startup/scaleup watchlist: 26 — Commercial analytics, CRM, launch and field-force intelligence.

It appears on the startup/scaleup watchlist in Category 26 because AI-enabled field planning and next-best-action tools target specialty and emerging-biopharma commercial teams. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

PHESI

Black Book category coverage: 6 — Digital twins, biosimulation and in silico development; 7 — Protocol design, feasibility and trial simulation; 8 — Trial site selection, recruitment and patient matching.

Phesi is represented across 3 Black Book scorecards spanning discovery & preclinical and clinical development. The category-relevant applications include biosimulation, virtual populations and digital twins, protocol design, feasibility and trial simulation, and site selection, patient matching and recruitment. Each performance result remains tied to the named product or service in its individual comparison market.

PHYSIQ

Black Book category coverage: 11 — Digital biomarkers, connected devices and remote trial monitoring. Integrated market-intelligence coverage: dark-horse challenger: 11 — Digital biomarkers, connected devices and remote trial monitoring.

physIQ is represented in Black Book Category 11 within the Digital biomarkers, connected devices and remote trial monitoring market. Its category-relevant capability and application scope includes wearables, sensors, digital endpoints, remote measurement, participant adherence and regulatory-grade signal processing. The integrated report also profiles physIQ as a dark-horse challenger in Category 11, where continuous physiologic analytics and remote monitoring provide a differentiated signal-processing layer for complex patient populations.

PICNICHEALTH

Integrated market-intelligence coverage: startup/scaleup watchlist: 12 — AI-enabled self-service RWE analytics and cohort intelligence.

It appears on the startup/scaleup watchlist in Category 12 because patient-centered longitudinal record collection can create differentiated cohorts and outcomes data for rare and complex conditions. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

PITCHER

Integrated market-intelligence coverage: startup/scaleup watchlist: 26 — Commercial analytics, CRM, launch and field-force intelligence.

It appears on the startup/scaleup watchlist in Category 26 because mobile sales enablement and closed-loop content workflows offer a focused omnichannel execution layer. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

POWER

Integrated market-intelligence coverage: startup/scaleup watchlist: 8 — Trial site selection, recruitment and patient matching.

It appears on the startup/scaleup watchlist in Category 8 because a patient-facing clinical-trial marketplace can reduce search friction and create a direct enrollment funnel for selected studies. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

PROFLUENT

Black Book category coverage: 3 — AI protein, antibody and biologics design. Integrated market-intelligence coverage: startup/scaleup watchlist: 3 — AI protein, antibody and biologics design.

Profluent is represented in Black Book Category 3 within the AI protein, antibody and biologics design market. Its category-relevant capability and application scope includes protein engineering, antibody design, affinity and developability prediction, immunogenicity and multimodal biologics optimization. It appears on the startup/scaleup watchlist in Category 3 because protein language models and AI-designed gene-editing systems could create high-value platform partnerships if experimental performance generalizes.

PROSCIA

Black Book category coverage: 19 — Digital pathology, imaging AI and companion-diagnostic development. Integrated market-intelligence coverage: startup/scaleup watchlist: 19 — Digital pathology, imaging AI and companion-diagnostic development.

Proscia is represented in Black Book Category 19 within the Digital pathology, imaging AI and companion-diagnostic development market. Its category-relevant capability and application scope includes pathology and imaging workflow AI, quantitative biomarkers, companion diagnostics, validation and clinical-research integration. It appears on the startup/scaleup watchlist in Category 19 because a scaled digital-pathology platform with growing AI applications remains a private-company benchmark for workflow adoption.

PUMAS-AI

Integrated market-intelligence coverage: startup/scaleup watchlist: 6 — Digital twins, biosimulation and in silico development.

It appears on the startup/scaleup watchlist in Category 6 because cloud-based pharmacometrics and model-informed development tools could expand expert modeling into repeatable team workflows. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

PURPLELAB

Integrated market-intelligence coverage: startup/scaleup watchlist: 13 — RWD networks, linkage, tokenization and external controls.

It appears on the startup/scaleup watchlist in Category 13 because claims-based analytics and data products provide an accessible route to cohort discovery and market intelligence. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

PUTNAM

Black Book category coverage: 14 — HEOR, market access, pricing and evidence strategy technology/services. Integrated market-intelligence coverage: dark-horse challenger: 14 — HEOR, market access, pricing and evidence strategy technology/services.

Putnam is represented in Black Book Category 14 within the HEOR, market access, pricing and evidence strategy technology/services market. Its category-relevant capability and application scope includes economic modeling, outcomes research, value dossiers, pricing, reimbursement, payer evidence and evidence strategy services. The integrated report also profiles Putnam as a dark-horse challenger in Category 14, where a focused life-sciences advisory model supports complex pricing, access and evidence decisions with less platform dependency.

PWC

Black Book category coverage: 28 — Life-sciences AI consulting, systems integration and managed services.

PwC is represented in Black Book Category 28 within the Life-sciences AI consulting, systems integration and managed services market. Its category-relevant capability and application scope includes strategy, operating model, implementation, integration, data engineering, validation, change management and managed delivery.

QIAGEN DIGITAL INSIGHTS

Black Book category coverage: 4 — Biomarker, multi-omics and precision-research intelligence; 18 — Genomics, bioinformatics and precision-medicine workflow platforms.

QIAGEN Digital Insights is represented across 2 Black Book scorecards spanning discovery & preclinical and data & diagnostics. The category-relevant applications include biomarker and multi-omics analysis and genomics, bioinformatics and precision-medicine workflows. Each performance result remains tied to the named product or service in its individual comparison market.

QUANTHEALTH

Black Book category coverage: 6 — Digital twins, biosimulation and in silico development; 7 — Protocol design, feasibility and trial simulation. Integrated market-intelligence coverage: dark-horse challenger: 6 — Digital twins, biosimulation and in silico development; 7 — Protocol design, feasibility and trial simulation.

QuantHealth is represented across 2 Black Book scorecards spanning discovery & preclinical and clinical development. The category-relevant applications include biosimulation, virtual populations and digital twins and protocol design, feasibility and trial simulation. Each performance result remains tied to the named product or service in its individual comparison market. The integrated report also profiles QuantHealth as a dark-horse challenger in Category 6, where AI-based trial simulation and virtual populations offer a faster, software-oriented alternative to traditional modeling engagements. It receives dark-horse monitoring in 2 categories overall.

QUANTORI

Integrated market-intelligence coverage: startup/scaleup watchlist: 28 — Life-sciences AI consulting, systems integration and managed services.

It appears on the startup/scaleup watchlist in Category 28 because a specialist scientific informatics and software-engineering firm can compete where domain expertise matters more than global scale. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

QUANTUM PV

Integrated market-intelligence coverage: startup/scaleup watchlist: 15 — Pharmacovigilance and safety-signal intelligence.

It appears on the startup/scaleup watchlist in Category 15 because AI-supported safety operations target case intake, quality control and signal workflows for teams constrained by manual effort. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

QURIS-AI

Integrated market-intelligence coverage: startup/scaleup watchlist: 6 — Digital twins, biosimulation and in silico development.

It appears on the startup/scaleup watchlist in Category 6 because organ-on-chip data and machine learning target patient-response prediction and preclinical safety, with regulatory validation as the critical hurdle. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

RECURSION

Black Book category coverage: 1 — AI drug target discovery and pathway modeling; 2 — Generative small-molecule design and optimization.

Recursion is represented across 2 Black Book scorecards within the discovery & preclinical domain. The category-relevant applications include target discovery and generative chemistry and molecular optimization. Each performance result remains tied to the named product or service in its individual comparison market. Scorecard references include Recursion and Recursion (including Exscientia).

REGASK

Integrated market-intelligence coverage: startup/scaleup watchlist: 16 — Regulatory intelligence, RIM and submission-content automation.

It appears on the startup/scaleup watchlist in Category 16 because ai-enabled regulatory intelligence and workflow support target faster horizon scanning and market-specific decision-making. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

RELATION THERAPEUTICS

Integrated market-intelligence coverage: startup/scaleup watchlist: 1 — AI drug target discovery and pathway modeling.

It appears on the startup/scaleup watchlist in Category 1 because combines human tissue biology, single-cell data and machine learning to identify and validate disease-relevant targets. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

REVVITY SIGNALS

Black Book category coverage: 20 — Laboratory informatics, scientific data and autonomous-lab enablement.

Revvity Signals is represented in Black Book Category 20 within the Laboratory informatics, scientific data and autonomous-lab enablement market. Its category-relevant capability and application scope includes IIMS, ELN, SDMS, instrument integration, scientific data clouds, lab automation and experiment orchestration.

ROAMBEE

Black Book category coverage: 24B — Clinical supply, cold chain, serialization and chain-of-identity intelligence.

Roambee is represented in Black Book Category 24B within the Clinical supply, cold chain, serialization and chain-of-identity intelligence market. Its category-relevant capability and application scope includes iRT/RTSM, packaging, labeling, temperature, logistics, serialization, cell/gene chain of identity and patient-level traceability.

ROCKWELL AUTOMATION

Black Book category coverage: 22 — GxP smart manufacturing, MES, digital twins and advanced process control.

Rockwell Automation is represented in Black Book Category 22 within the GxP smart manufacturing, MES, digital twins and advanced process control market. Its category-relevant capability and application scope includes MES, electronic batch records, process analytics, PAT, digital twins, predictive operations and manufacturing execution.

ROSA & CO.

Black Book category coverage: 6 — Digital twins, biosimulation and in silico development.

Rosa & Co. is represented in Black Book Category 6 within the Digital twins, biosimulation and in silico development market. Its category-relevant capability and application scope includes quantitative systems pharmacology, virtual populations, disease progression, synthetic control and trial simulation.

RXLOGIX

Black Book category coverage: 15 — Pharmacovigilance and safety-signal intelligence. Integrated market-intelligence coverage: dark-horse challenger: 15 — Pharmacovigilance and safety-signal intelligence.

RxLogix is represented in Black Book Category 15 within the Pharmacovigilance and safety-signal intelligence market. Its category-relevant capability and application scope includes case intake, duplicate detection, coding, narratives, aggregate reporting, literature surveillance and signal management. The integrated report also profiles RxLogix as a dark-horse challenger in Category 15, where modern safety analytics, signal management and automation create a credible alternative to the largest end-to-end safety suites.

RYGHT AI

Integrated market-intelligence coverage: startup/scaleup watchlist: 8 — Trial site selection, recruitment and patient matching.

It appears on the startup/scaleup watchlist in Category 8 because generative-AI study and site intelligence could improve feasibility research and accelerate identification of qualified investigators. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

SAAMA

Black Book category coverage: 7 — Protocol design, feasibility and trial simulation; 10 — Clinical data review, RBQM and automated trial-quality intelligence. Integrated market-intelligence coverage: dark-horse challenger: 7 — Protocol design, feasibility and trial simulation.

Saama is represented across 2 Black Book scorecards within the clinical development domain. The category-relevant applications include protocol design, feasibility and trial simulation and clinical data review and risk-based quality management. Each performance result remains tied to the named product or service in its individual comparison market. The integrated report also profiles Saama as a dark-horse challenger in Category 7, where a broad clinical data foundation and agentic workflow strategy could connect protocol planning with downstream execution intelligence.

SAFETYSIGNAL AI

Integrated market-intelligence coverage: startup/scaleup watchlist: 15 — Pharmacovigilance and safety-signal intelligence.

It appears on the startup/scaleup watchlist in Category 15 because a specialist focus on safety signal detection and prioritization could improve surveillance speed for smaller organizations. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

SALESFORCE

Black Book category coverage: 26 — Commercial analytics, CRM, launch and field-force intelligence.

Salesforce is represented in Black Book Category 26 within the Commercial analytics, CRM, launch and field-force intelligence market. Its category-relevant capability and application scope includes life-sciences CRM, next-best action, customer intelligence, territory, launch, forecasting, omnichannel and field execution. Scorecard references include Salesforce Life Sciences Cloud.

SAP

Black Book category coverage: 24A — Supply planning, demand forecasting, inventory and resilience.

SAP is represented in Black Book Category 24A within the Supply planning, demand forecasting, inventory and resilience market. Its category-relevant capability and application scope includes network planning, demand sensing, launch readiness, inventory, shortage risk, supplier visibility and scenario optimization. Scorecard references include SAP Integrated Business Planning.

SAPHETOR (VAR SOME)

Black Book category coverage: 18 — Genomics, bioinformatics and precision-medicine workflow platforms. Integrated market-intelligence coverage: dark-horse challenger: 18 — Genomics, bioinformatics and precision-medicine workflow platforms.

Saphetor (VarSome) is represented in Black Book Category 18 within the Genomics, bioinformatics and precision-medicine workflow platforms market. Its category-relevant capability and application scope includes genomic analysis, variant interpretation, multi-omics workflows, secure collaboration and clinical/translational bioinformatics. Scorecard references include Saphetor VarSome. The integrated report also profiles Saphetor (VarSome) as a dark-horse challenger in Category 18, where accessible variant knowledge and interpretation workflows can serve laboratories and distributed clinical-genomics teams.

SAPIO SCIENCES

Black Book category coverage: 20 — Laboratory informatics, scientific data and autonomous-lab enablement. Integrated market-intelligence coverage: dark-horse challenger: 20 — Laboratory informatics, scientific data and autonomous-lab enablement.

Sapio Sciences is represented in Black Book Category 20 within the Laboratory informatics, scientific data and autonomous-lab enablement market. Its category-relevant capability and application scope includes LIMS, ELN, SDMS, instrument integration, scientific data clouds, lab automation and experiment orchestration. The integrated report also profiles Sapio Sciences as a dark-horse challenger in Category 20, where a unified LIMS, ELN and scientific data cloud with embedded AI can challenge larger laboratory informatics portfolios.

SARTORIUS

Black Book category coverage: 21 — Process development, formulation, scale-up and technology transfer. Integrated market-intelligence coverage: dark-horse challenger: 21 — Process development, formulation, scale-up and technology transfer.

Sartorius is represented in Black Book Category 21 within the Process development, formulation, scale-up and technology transfer market. Its category-relevant capability and application scope includes process modeling, formulation, design of experiments, scale-up, tech transfer, comparability and development knowledge management. The integrated report also profiles Sartorius as a dark-horse challenger in Category 21, where process development instruments, data and bioprocess expertise create a strong foundation for integrated modeling and scale-up intelligence.

SAS

Black Book category coverage: 27 — AI governance, model validation, MLOps, cybersecurity and controlled deployment.

SAS is represented in Black Book Category 27 within the AI governance, model validation, MLOps, cybersecurity and controlled deployment market. Its category-relevant capability and application scope includes model inventory, risk classification, monitoring, change control, validation, security, privacy and regulated AI operations.

SCHRÖDINGER

Black Book category coverage: 2 — Generative small-molecule design and optimization.

Schrödinger is represented in Black Book Category 2 within the Generative small-molecule design and optimization market. Its category-relevant capability and application scope includes molecular generation, virtual screening, medicinal chemistry optimization, ADMET prediction and design-make-test-learn acceleration.

SCILIFE

Integrated market-intelligence coverage: startup/scaleup watchlist: 23 — Predictive quality, deviations, CAPA, batch review and validation intelligence.

It appears on the startup/scaleup watchlist in Category 23 because an accessible life-sciences quality platform may appeal to smaller manufacturers and laboratories needing integrated QMS workflows. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

SECTRA

Black Book category coverage: 19 — Digital pathology, imaging AI and companion-diagnostic development.

Sectra is represented in Black Book Category 19 within the Digital pathology, imaging AI and companion-diagnostic development market. Its category-relevant capability and application scope includes pathology and imaging workflow AI, quantitative biomarkers, companion diagnostics, validation and clinical-research integration.

SEEQ

Black Book category coverage: 21 — Process development, formulation, scale-up and technology transfer; 22 — GxP smart manufacturing, MES, digital twins and advanced process control. Integrated market-intelligence coverage: dark-horse challenger: 21 — Process development, formulation, scale-up and technology transfer; 22 — GxP smart manufacturing, MES, digital twins and advanced process control.

Seeq is represented across 2 Black Book scorecards within the development & manufacturing domain. The category-relevant applications include process development, formulation and technology transfer and GxP manufacturing, MES and advanced process control. Each performance result remains tied to the named product or service in its individual comparison market. The integrated report also profiles Seeq as a dark-horse challenger in Category 21, where advanced industrial analytics can expose process relationships and support scale-up decisions without requiring a full platform replacement. It receives dark-horse monitoring in 2 categories overall.

SENSITECH

Black Book category coverage: 24B — Clinical supply, cold chain, serialization and chain-of-identity intelligence. Integrated market-intelligence coverage: dark-horse challenger: 24B — Clinical supply, cold chain, serialization and chain-of-identity intelligence.

Sensitech is represented in Black Book Category 24B within the Clinical supply, cold chain, serialization and chain-of-identity intelligence market. Its category-relevant capability and application scope includes iRT/RTSM, packaging, labeling, temperature, logistics, serialization, cell/gene chain of identity and patient-level traceability. The integrated report also profiles Sensitech as a dark-horse challenger in Category 24B, where temperature monitoring, logistics visibility and cold-chain expertise give it substantial depth in regulated product movement.

SERNA BIO

Integrated market-intelligence coverage: startup/scaleup watchlist: 2 — Generative small-molecule design and optimization.

It appears on the startup/scaleup watchlist in Category 2 because targets RNA structures with machine learning and small molecules, creating a differentiated chemistry opportunity beyond protein targets. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

SEVEN BRIDGES

Black Book category coverage: 4 — Biomarker, multi-omics and precision-research intelligence; 18 — Genomics, bioinformatics and precision-medicine workflow platforms. **Integrated market-intelligence coverage:** dark-horse challenger: 4 — Biomarker, multi-omics and precision-research intelligence.

Seven Bridges is represented across 2 Black Book scorecards spanning discovery & preclinical and data & diagnostics. The category-relevant applications include biomarker and multi-omics analysis and genomics, bioinformatics and precision-medicine workflows. Each performance result remains tied to the named product or service in its individual comparison market. The integrated report also profiles Seven Bridges as a dark-horse challenger in Category 4, where its governed bioinformatics environment can support reproducible multi-omics pipelines across distributed research teams.

SIEMENS

Black Book category coverage: 20 — Laboratory informatics, scientific data and autonomous-lab enablement; 21 — Process development, formulation, scale-up and technology transfer; 22 — GxP smart manufacturing, MES, digital twins and advanced process control.

Siemens is represented across 3 Black Book scorecards spanning laboratory & science and development & manufacturing. The category-relevant applications include laboratory informatics, scientific data and lab automation, process development, formulation and technology transfer, and GxP manufacturing, MES and advanced process control. Each performance result remains tied to the named product or service in its individual comparison market. Scorecard references include Siemens and Siemens (including Dotmatics).

SIGNANT HEALTH

Black Book category coverage: 9 — eClinical and decentralized trial execution; 10 — Clinical data review, RBQM and automated trial-quality intelligence. **Integrated market-intelligence coverage:** dark-horse challenger: 10 — Clinical data review, RBQM and automated trial-quality intelligence.

Signant Health is represented across 2 Black Book scorecards within the clinical development domain. The category-relevant applications include eClinical and decentralized-trial execution and clinical data review and risk-based quality management. Each performance result remains tied to the named product or service in its individual comparison market. The integrated report also profiles Signant Health as a dark-horse challenger in Category 10, where broad endpoint, data-quality and trial-technology experience gives it an underrecognized position in integrated quality oversight.

SIMULATIONS PLUS

Black Book category coverage: 6 — Digital twins, biosimulation and in silico development.

Simulations Plus is represented in Black Book Category 6 within the Digital twins, biosimulation and in silico development market. Its category-relevant capability and application scope includes quantitative systems pharmacology, virtual populations, disease progression, synthetic control and trial simulation.

SKYCELL

Black Book category coverage: 24B — Clinical supply, cold chain, serialization and chain-of-identity intelligence. **Integrated market-intelligence coverage:** startup/scaleup watchlist: 24B — Clinical supply, cold chain, serialization and chain-of-identity intelligence.

SkyCell is represented in Black Book Category 24B within the Clinical supply, cold chain, serialization and chain-of-identity intelligence market. Its category-relevant capability and application scope includes iRT/RTSM, packaging, labeling, temperature, logistics, serialization, cell/gene chain of identity and patient-level traceability. It appears on the startup/scaleup watchlist in Category 24B because temperature-controlled containers, monitoring and software support high-value pharmaceutical logistics with a data-rich operating model.

SNOWFLAKE

Black Book category coverage: 17 — AI-ready clinical and translational data operating platforms.

Snowflake is represented in Black Book Category 17 within the AI-ready clinical and translational data operating platforms market. Its category-relevant capability and application scope includes multimodal ingestion, semantic harmonization, validation, interoperability, cohort tools, governance and AI-ready customer-controlled data. Scorecard references include Snowflake AI Data Cloud.

SOPHIA GENETICS

Black Book category coverage: 4 — Biomarker, multi-omics and precision-research intelligence; 17 — AI-ready clinical and translational data operating platforms; 18 — Genomics, bioinformatics and precision-medicine workflow platforms. **Integrated market-intelligence coverage:** dark-horse challenger: 17 — AI-ready clinical and translational data operating platforms.

SOPHiA GENETICS is represented across 3 Black Book scorecards spanning discovery & preclinical, data foundation, and data & diagnostics. The category-relevant applications include biomarker and multi-omics analysis, AI-ready clinical and translational data operations, and genomics, bioinformatics and precision-medicine workflows. Each performance result remains tied to the named product or service in its individual comparison market. Scorecard references include SOPHiA DDM, SOPHiA DDM Multimodal, and SOPHiA GENETICS. The integrated report also profiles SOPHiA GENETICS as a dark-horse challenger in Category 17, where a clinically oriented multimodal environment can connect genomics and phenotypic data for precision-research workflows.

SORCERO

Integrated market-intelligence coverage: startup/scaleup watchlist: 25 — Medical affairs, scientific engagement and omnichannel content intelligence.

It appears on the startup/scaleup watchlist in Category 25 because language intelligence for medical content targets faster review, reuse and evidence-grounded scientific communications. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

STRATEOS

Black Book category coverage: 20 — Laboratory informatics, scientific data and autonomous-lab enablement. Integrated market-intelligence coverage: dark-horse challenger: 20 — Laboratory informatics, scientific data and autonomous-lab enablement.

Strateos is represented in Black Book Category 20 within the Laboratory informatics, scientific data and autonomous-lab enablement market. Its category-relevant capability and application scope includes IIMS, ELN, SDMS, instrument integration, scientific data clouds, lab automation and experiment orchestration. The integrated report also profiles Strateos as a dark-horse challenger in Category 20, where remote and automated laboratory execution offers a differentiated model for experiment orchestration and reproducible physical workflows.

SUVODA

Black Book category coverage: 24B — Clinical supply, cold chain, serialization and chain-of-identity intelligence. Integrated market-intelligence coverage: dark-horse challenger: 24B — Clinical supply, cold chain, serialization and chain-of-identity intelligence.

Suvoda is represented in Black Book Category 24B within the Clinical supply, cold chain, serialization and chain-of-identity intelligence market. Its category-relevant capability and application scope includes iRT/RTSM, packaging, labeling, temperature, logistics, serialization, cell/gene chain of identity and patient-level traceability. The integrated report also profiles Suvoda as a dark-horse challenger in Category 24B, where rTSM and clinical-supply capabilities offer a strong operational position across randomization, inventory and patient-level trial supply.

SYNTHACE

Black Book category coverage: 20 — Laboratory informatics, scientific data and autonomous-lab enablement. Integrated market-intelligence coverage: startup/scaleup watchlist: 20 — Laboratory informatics, scientific data and autonomous-lab enablement.

Synthace is represented in Black Book Category 20 within the Laboratory informatics, scientific data and autonomous-lab enablement market. Its category-relevant capability and application scope includes IIMS, ELN, SDMS, instrument integration, scientific data clouds, lab automation and experiment orchestration. It appears on the startup/scaleup watchlist in Category 20 because experiment design and automation software targets complex biological workflows and transferable laboratory methods.

TATA CONSULTANCY SERVICES

Black Book category coverage: 28 — Life-sciences AI consulting, systems integration and managed services. Integrated market-intelligence coverage: dark-horse challenger: 28 — Life-sciences AI consulting, systems integration and managed services.

Tata Consultancy Services is represented in Black Book Category 28 within the Life-sciences AI consulting, systems integration and managed services market. Its category-relevant capability and application scope includes strategy, operating model, implementation, integration, data engineering, validation, change management and managed delivery. The integrated report also profiles Tata Consultancy Services as a dark-horse challenger in Category 28, where global delivery scale and life-sciences technology depth make TCS a credible challenger where transformation spans data, applications and operations.

TEMPUS AI

Black Book category coverage: 4 — Biomarker, multi-omics and precision-research intelligence; 7 — Protocol design, feasibility and trial simulation; 8 — Trial site selection, recruitment and patient matching; 19 — Digital pathology, imaging AI and companion-diagnostic development.

Tempus AI is represented across 4 Black Book scorecards spanning discovery & preclinical, clinical development, and data & diagnostics. The category-relevant applications include biomarker and multi-omics analysis, protocol design, feasibility and trial simulation, site selection, patient matching and recruitment, and digital pathology, imaging AI and companion diagnostics. Each performance result remains tied to the named product or service in its individual comparison market. Scorecard references include Tempus AI and Tempus AI / Deep 6 AI.

TENTHPIN

Integrated market-intelligence coverage: startup/scaleup watchlist: 28 — Life-sciences AI consulting, systems integration and managed services.

It appears on the startup/scaleup watchlist in Category 28 because life-sciences-focused consulting and SAP transformation capabilities make it a specialist challenger for regulated enterprise programs. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

TETRASCIENCE

Black Book category coverage: 20 — Laboratory informatics, scientific data and autonomous-lab enablement. Integrated market-intelligence coverage: startup/scaleup watchlist: 20 — Laboratory informatics, scientific data and autonomous-lab enablement.

TetraScience is represented in Black Book Category 20 within the Laboratory informatics, scientific data and autonomous-lab enablement market. Its category-relevant capability and application scope includes IIMS, ELN, SDMS, instrument integration, scientific data clouds, lab automation and experiment orchestration. It appears on the startup/scaleup watchlist in Category 20 because a scientific data cloud and integration network make it a scaleup to watch as laboratories prepare data for AI and automation.

THERALYZE.AI

Integrated market-intelligence coverage: startup/scaleup watchlist: 15 — Pharmacovigilance and safety-signal intelligence.

It appears on the startup/scaleup watchlist in Category 15 because automation of literature and safety review offers a narrow entry point into pharmacovigilance modernization. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

THERMO FISHER SCIENTIFIC

Black Book category coverage: 20 — Laboratory informatics, scientific data and autonomous-lab enablement.

Thermo Fisher Scientific is represented in Black Book Category 20 within the Laboratory informatics, scientific data and autonomous-lab enablement market. Its category-relevant capability and application scope includes IIMS, ELN, SDMS, instrument integration, scientific data clouds, lab automation and experiment orchestration.

THROUGHPUT AI

Integrated market-intelligence coverage: startup/scaleup watchlist: 24A — Supply planning, demand forecasting, inventory and resilience.

It appears on the startup/scaleup watchlist in Category 24A because operational analytics target bottlenecks, material flow and working-capital improvement using existing enterprise data. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

TIVE

Black Book category coverage: 24B — Clinical supply, cold chain, serialization and chain-of-identity intelligence. Integrated market-intelligence coverage: startup/scaleup watchlist: 24B — Clinical supply, cold chain, serialization and chain-of-identity intelligence.

Tive is represented in Black Book Category 24B within the Clinical supply, cold chain, serialization and chain-of-identity intelligence market. Its category-relevant capability and application scope includes iRT/RTSM, packaging, labeling, temperature, logistics, serialization, cell/gene chain of identity and patient-level traceability. It appears on the startup/scaleup watchlist in Category 24B because real-time shipment visibility and sensor data can extend cold-chain control beyond traditional lane-level monitoring.

TRACELINK

Black Book category coverage: 24A — Supply planning, demand forecasting, inventory and resilience; 24B — Clinical supply, cold chain, serialization and chain-of-identity intelligence. Integrated market-intelligence coverage: dark-horse challenger: 24A — Supply planning, demand forecasting, inventory and resilience.

TraceLink is represented across 2 Black Book scorecards within the supply chain domain. The category-relevant applications include supply planning, demand forecasting, inventory and resilience and clinical supply, cold chain, serialization and chain of identity. Each performance result remains tied to the named product or service in its individual comparison market. The integrated report also profiles TraceLink as a dark-horse challenger in Category 24A, where a life-sciences network and multienterprise data model can extend from traceability into planning, supplier visibility and disruption response.

TRAKCEL

Black Book category coverage: 24B — Clinical supply, cold chain, serialization and chain-of-identity intelligence. Integrated market-intelligence coverage: dark-horse challenger: 24B — Clinical supply, cold chain, serialization and chain-of-identity intelligence.

TrakCel is represented in Black Book Category 24B within the Clinical supply, cold chain, serialization and chain-of-identity intelligence market. Its category-relevant capability and application scope includes iRT/RTSM, packaging, labeling, temperature, logistics, serialization, cell/gene chain of identity and patient-level traceability. The integrated report also profiles TrakCel as a dark-horse challenger in Category 24B, where cell and gene therapy orchestration provides specialized chain-of-identity and chain-of-custody capabilities for complex therapies.

TRANSCRIPTA BIO

Integrated market-intelligence coverage: startup/scaleup watchlist: 4 — Biomarker, multi-omics and precision-research intelligence.

It appears on the startup/scaleup watchlist in Category 4 because a large transcriptomic perturbation atlas may support biomarker discovery, disease-gene association and response prediction. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

TRIALBEE

Black Book category coverage: 8 — Trial site selection, recruitment and patient matching. Integrated market-intelligence coverage: dark-horse challenger: 8 — Trial site selection, recruitment and patient matching.

Trialbee is represented in Black Book Category 8 within the Trial site selection, recruitment and patient matching market. Its category-relevant capability and application scope includes site intelligence, cohort discovery, patient matching, referral, diversity, enrollment and retention performance. The integrated report also profiles Trialbee as a dark-horse challenger in Category 8, where patient recruitment technology and services provide a focused alternative to broad eClinical suites, especially for hard-to-reach populations.

TRIALKEY

Integrated market-intelligence coverage: startup/scaleup watchlist: 7 — Protocol design, feasibility and trial simulation.

It appears on the startup/scaleup watchlist in Category 7 because machine-learning estimates of trial success and design risk may support portfolio screening and early protocol decisions. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

TRIAL LIBRARY

Integrated market-intelligence coverage: startup/scaleup watchlist: 8 — Trial site selection, recruitment and patient matching.

It appears on the startup/scaleup watchlist in Category 8 because community-based recruitment infrastructure targets representative enrollment and access for populations often missed by traditional channels. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

TRINETX

Black Book category coverage: 7 — Protocol design, feasibility and trial simulation; 8 — Trial site selection, recruitment and patient matching; 12 — AI-enabled self-service RWE analytics and cohort intelligence; 13 — RWD networks, linkage, tokenization and external controls. Integrated market-intelligence coverage: dark-horse challenger: 13 — RWD networks, linkage, tokenization and external controls.

TriNetX is represented across 4 Black Book scorecards spanning clinical development and evidence & market access. The category-relevant applications include protocol design, feasibility and trial simulation, site selection, patient matching and recruitment, self-service real-world evidence analytics, and real-world data linkage, tokenization and external controls. Each performance result remains tied to the named product or service in its individual comparison market. The integrated report also profiles TriNetX as a dark-horse challenger in Category 13, where its federated network and cohort tools can support external comparators and linked research without moving all source data centrally.

TRINITY LIFE SCIENCES

Black Book category coverage: 14 — HEOR, market access, pricing and evidence strategy technology/services. Integrated market-intelligence coverage: dark-horse challenger: 14 — HEOR, market access, pricing and evidence strategy technology/services.

Trinity Life Sciences is represented in Black Book Category 14 within the HEOR, market access, pricing and evidence strategy technology/services market. Its category-relevant capability and application scope includes economic modeling, outcomes research, value dossiers, pricing, reimbursement, payer evidence and evidence strategy services. The integrated report also profiles Trinity Life Sciences as a dark-horse challenger in Category 14, where integrated strategy, analytics and commercialization services create continuity from evidence planning through launch and access.

TRUVETA

Integrated market-intelligence coverage: startup/scaleup watchlist: 13 — RWD networks, linkage, tokenization and external controls.

It appears on the startup/scaleup watchlist in Category 13 because health-system-governed data at scale may become a major source for linked, clinically rich RWD and external controls. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

TULIP

Integrated market-intelligence coverage: startup/scaleup watchlist: 22 — GxP smart manufacturing, MES, digital twins and advanced process control.

It appears on the startup/scaleup watchlist in Category 22 because composable frontline operations software can digitize work instructions, data capture and production workflows without monolithic MES replacement. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

UNLEARN

Black Book category coverage: 6 — Digital twins, biosimulation and in silico development.

Unlearn is represented in Black Book Category 6 within the Digital twins, biosimulation and in silico development market. Its category-relevant capability and application scope includes quantitative systems pharmacology, virtual populations, disease progression, synthetic control and trial simulation.

VALGENESIS

Black Book category coverage: 23 — Predictive quality, deviations, CAPA, batch review and validation intelligence. Integrated market-intelligence coverage: dark-horse challenger: 23 — Predictive quality, deviations, CAPA, batch review and validation intelligence.

ValGenesis is represented in Black Book Category 23 within the Predictive quality, deviations, CAPA, batch review and validation intelligence market. Its category-relevant capability and application scope includes quality management, deviation triage, root cause, CAPA, validation, document review, inspection readiness and release support. The integrated report also profiles ValGenesis as a dark-horse challenger in Category 23, where digital validation lifecycle management provides specialized depth where general quality suites remain document-centric.

VALO HEALTH

Black Book category coverage: 1 — AI drug target discovery and pathway modeling. Integrated market-intelligence coverage: dark-horse challenger: 1 — AI drug target discovery and pathway modeling.

Valo Health is represented in Black Book Category 1 within the AI drug target discovery and pathway modeling market. Its category-relevant capability and application scope includes target identification, causal biology, disease networks, pathway prioritization and sponsor-partner execution. The integrated report also profiles Valo Health as a dark-horse challenger in Category 1, where its integrated data-and-computation model can appeal to sponsors seeking a discovery partner rather than a stand-alone algorithm, but client visibility remains comparatively limited.

VEEVA

Black Book category coverage: 9 — eClinical and decentralized trial execution; 10 — Clinical data review, RBQM and automated trial-quality intelligence; 15 — Pharmacovigilance and safety-signal intelligence; 16 — Regulatory intelligence, RIM and submission-content automation; 23 — Predictive quality, deviations, CAPA, batch review and validation intelligence; 25 — Medical affairs, scientific engagement and omnichannel content intelligence; 26 — Commercial analytics, CRM, launch and field-force intelligence.

Veeva is represented across 7 Black Book scorecards spanning clinical development, safety & regulatory, quality & validation, medical & external engagement, and commercial operations. The category-relevant applications include eClinical and decentralized-trial execution, clinical data review and risk-based quality management, pharmacovigilance and safety-signal operations, regulatory information, authoring and submission operations, quality, deviations, CAPA, validation and batch review, medical affairs, scientific engagement and content intelligence, and commercial analytics, CRM, launch and field execution. Each performance result remains tied to the named product or service in its individual comparison market. Scorecard references include Veeva, Veeva Medical, and Veeva Vault CRM / Nitro.

VELSERA

Black Book category coverage: 18 — Genomics, bioinformatics and precision-medicine workflow platforms. Integrated market-intelligence coverage: startup/scaleup watchlist: 18 — Genomics, bioinformatics and precision-medicine workflow platforms.

Velsera is represented in Black Book Category 18 within the Genomics, bioinformatics and precision-medicine workflow platforms market. Its category-relevant capability and application scope includes genomic analysis, variant interpretation, multi-omics workflows, secure collaboration and clinical/translational bioinformatics. It appears on the startup/scaleup watchlist in Category 18 because integrated clinical genomics, data and workflow capabilities position the scaleup for multi-institution precision-medicine programs.

VERADIGM

Black Book category coverage: 12 — AI-enabled self-service RWE analytics and cohort intelligence; 13 — RWD networks, linkage, tokenization and external controls. Integrated market-intelligence coverage: dark-horse challenger: 13 — RWD networks, linkage, tokenization and external controls.

Veradigm is represented across 2 Black Book scorecards within the evidence & market access domain. The category-relevant applications include self-service real-world evidence analytics and real-world data linkage, tokenization and external controls. Each performance result remains tied to the named product or service in its individual comparison market. The integrated report also profiles Veradigm as a dark-horse challenger in Category 13, where a large ambulatory EHR footprint and research services create useful linkage and longitudinal-data potential beyond analytics alone.

VERISIM LIFE

Integrated market-intelligence coverage: startup/scaleup watchlist: 6 — Digital twins, biosimulation and in silico development.

It appears on the startup/scaleup watchlist in Category 6 because biosimulation and translational modeling aim to reduce animal use and improve candidate selection across preclinical development. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

VISIOPHARM

Black Book category coverage: 19 — Digital pathology, imaging AI and companion-diagnostic development. Integrated market-intelligence coverage: dark-horse challenger: 19 — Digital pathology, imaging AI and companion-diagnostic development.

Visiopharm is represented in Black Book Category 19 within the Digital pathology, imaging AI and companion-diagnostic development market. Its category-relevant capability and application scope includes pathology and imaging workflow AI, quantitative biomarkers, companion diagnostics, validation and clinical-research integration. The integrated report also profiles Visiopharm as a dark-horse challenger in Category 19, where quantitative digital pathology and image-analysis depth remain valuable for translational research and biomarker development.

VIVOSENSE

Black Book category coverage: 11 — Digital biomarkers, connected devices and remote trial monitoring. Integrated market-intelligence coverage: dark-horse challenger: 11 — Digital biomarkers, connected devices and remote trial monitoring.

VivoSense is represented in Black Book Category 11 within the Digital biomarkers, connected devices and remote trial monitoring market. Its category-relevant capability and application scope includes wearables, sensors, digital endpoints, remote measurement, participant adherence and regulatory-grade signal processing. The integrated report also profiles VivoSense as a dark-horse challenger in Category 11, where digital biomarker development and analytics services can help sponsors convert sensor streams into fit-for-purpose endpoints.

WEAVE BIO

Integrated market-intelligence coverage: startup/scaleup watchlist: 16 — Regulatory intelligence, RIM and submission-content automation.

It appears on the startup/scaleup watchlist in Category 16 because structured data and automated authoring aim to make regulatory submissions more reusable, traceable and machine-assisted. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

WIPRO

Black Book category coverage: 28 — Life-sciences AI consulting, systems integration and managed services. Integrated market-intelligence coverage: dark-horse challenger: 28 — Life-sciences AI consulting, systems integration and managed services.

Wipro is represented in Black Book Category 28 within the Life-sciences AI consulting, systems integration and managed services market. Its category-relevant capability and application scope includes strategy, operating model, implementation, integration, data engineering, validation, change management and managed delivery. The integrated report also profiles Wipro as a dark-horse challenger in Category 28, where broad managed services and life-sciences experience may appeal to buyers consolidating technology operations and cost structures.

WITHIN3

Black Book category coverage: 25 — Medical affairs, scientific engagement and omnichannel content intelligence. Integrated market-intelligence coverage: dark-horse challenger: 25 — Medical affairs, scientific engagement and omnichannel content intelligence.

Within3 is represented in Black Book Category 25 within the Medical affairs, scientific engagement and omnichannel content intelligence market. Its category-relevant capability and application scope includes medical strategy, evidence dissemination, publications, congresses, MSL insights, compliant content and stakeholder engagement. The integrated report also profiles Within3 as a dark-horse challenger in Category 25, where insight management and virtual engagement tools can unify stakeholder intelligence across advisory, community and field activities.

XAIRA THERAPEUTICS

Black Book category coverage: 3 — AI protein, antibody and biologics design.

Xaira Therapeutics is represented in Black Book Category 3 within the AI protein, antibody and biologics design market. Its category-relevant capability and application scope includes protein engineering, antibody design, affinity and developability prediction, immunogenicity and multimodal biologics optimization.

XTALPI

Black Book category coverage: 1 — AI drug target discovery and pathway modeling; 2 — Generative small-molecule design and optimization.

XtalPi is represented across 2 Black Book scorecards within the discovery & preclinical domain. The category-relevant applications include target discovery and generative chemistry and molecular optimization. Each performance result remains tied to the named product or service in its individual comparison market.

YONALINK

Integrated market-intelligence coverage: startup/scaleup watchlist: 10 — Clinical data review, RBQM and automated trial-quality intelligence.

It appears on the startup/scaleup watchlist in Category 10 because direct EHR-to-EDC data transfer can reduce transcription burden and improve source-data timeliness for selected studies. This intelligence designation is not a Black Book client-performance award unless the organization also appears in a ranked scorecard.

YSEOP

Black Book category coverage: 16 — Regulatory intelligence, RIM and submission-content automation. Integrated market-intelligence coverage: dark-horse challenger: 16 — Regulatory intelligence, RIM and submission-content automation.

Yseop is represented in Black Book Category 16 within the Regulatory intelligence, RIM and submission-content automation market. Its category-relevant capability and application scope includes regulatory information management, publishing, authoring, content reuse, health-authority intelligence and submission operations. The integrated report also profiles Yseop as a dark-horse challenger in Category 16, where purpose-built natural-language generation for regulated documents gives it stronger domain fit than general enterprise writing tools.

ZS

Black Book category coverage: 14 — HEOR, market access, pricing and evidence strategy technology/services; 25 — Medical affairs, scientific engagement and omnichannel content intelligence; 26 — Commercial analytics, CRM, launch and field-force intelligence; 28 — Life-sciences AI consulting, systems integration and managed services.

ZS is represented across 4 Black Book scorecards spanning evidence & market access, medical & external engagement, commercial operations, and enterprise services. The category-relevant applications include HEOR, market access, pricing and evidence strategy, medical affairs, scientific engagement and content intelligence, commercial analytics, CRM, launch and field execution, and life-sciences consulting, systems integration and managed services. Each performance result remains tied to the named product or service in its individual comparison market.

APPENDIX C

DIRECTORY OF HEALTHCARE IT, DATA AND ARTIFICIAL INTELLIGENCE ADVISORY AND CONSULTING FIRMS SERVING LIFE SCIENCES, BIOTECHNOLOGY AND PHARMACEUTICALS

PURPOSE AND SCOPE

This directory identifies major global, regional, country-focused and specialist advisory firms supporting artificial intelligence, healthcare information technology, data science and digital transformation across life sciences, biotechnology, pharmaceuticals and adjacent healthcare sectors.

The directory includes firms serving:

- Global, regional, specialty and emerging pharmaceutical manufacturers;
- Biotechnology, TechBio, cell and gene therapy and virtual-biotech companies;
- Medical-device, diagnostic, laboratory and life-sciences tools companies;
- Contract research organizations, contract development and manufacturing organizations and clinical research sites;
- Healthcare providers, health systems, payers, pharmacies and distributors;
- Public-health agencies, ministries of health, regulators and nongovernmental organizations;
- Academic medical centers, research institutes and scientific consortia;
- Private-equity, venture-capital, family-office and corporate-venture investors;
- Healthcare IT, digital-health, artificial-intelligence and data-platform companies; and
- Professional-services, insurance, legal, financial and technology organizations serving the healthcare and life-sciences ecosystem.

Covered engagement types include enterprise AI strategy, scientific AI, drug discovery, clinical development, regulatory affairs, pharmacovigilance, manufacturing, quality, supply chain, commercial operations, medical affairs, market access, patient engagement, real-world evidence, data governance, cloud modernization, cybersecurity, systems integration, transaction support and interim program leadership.

GEOGRAPHIC INTERPRETATION

Most consulting firms do not disclose complete country-by-country client lists because engagements are confidential. The geographic descriptions below therefore reflect publicly identified headquarters, offices, delivery centers, regional hubs and documented client markets. Countries listed are representative rather than exhaustive.

DIRECTORY DISCLAIMER

Inclusion does not constitute a Black Book ranking, award or endorsement. Some organizations listed are independent advisors, while others also sell software, data, cloud platforms, implementation services, clinical research services or managed operations. Prospective clients should evaluate potential commercial conflicts, vendor neutrality, data rights, platform dependencies and implementation incentives before engagement.

A INDEPENDENT AND SPECIALIZED INTERIM AI LEADERSHIP ADVISORY

1. APPLIED ARTIFICIAL INTELLIGENCE LLC

Headquarters: Chicago, Illinois, United States

Operating scope: Independent, United States-based advisory firm; country coverage is defined according to the requirements of each engagement.

Primary client types: Healthcare and life-sciences organizations, technology companies, innovators, investors, executive teams and organizations requiring temporary or project-specific AI leadership.

AI and healthcare IT capabilities: Applied Artificial Intelligence LLC specializes in the financial and technological evaluation of artificial-intelligence initiatives. Its work is positioned between strategic advisory, technical assessment, investment analysis and temporary executive leadership.

Representative engagement types:

- Enterprise AI strategy and use-case prioritization;
- Financial analysis and business-case development;
- Temporary, fractional or interim leadership of AI engagements;
- AI project, program and initiative governance;
- Technology and architecture assessment;
- Vendor and platform evaluation;
- Project mobilization, recovery and remediation;
- Executive workshops and stakeholder alignment;
- Investment, acquisition and partnership analysis;
- Operating-model and organizational-readiness assessment; and
- Translation of technical AI capabilities into measurable business and financial outcomes.

Appropriate use: Organizations requiring direct senior-level leadership without immediately appointing a permanent AI executive, or organizations needing an independent assessment before committing capital to a major AI program.

B GLOBAL MULTIDISCIPLINARY STRATEGY, TECHNOLOGY AND SYSTEMS-INTEGRATION FIRMS

2. ACCENTURE

Global headquarters: Dublin, Ireland

Engagement geography: Global. Accenture operates in more than 50 countries and 200 cities and reports serving clients across more than 120 countries.

Primary client types: Global and regional pharmaceutical manufacturers, biotechnology companies, medical-device firms, providers, payers, public-health agencies, technology companies and investors.

AI and healthcare IT capabilities: Enterprise AI strategy, generative and agentic AI, cloud migration, data architecture, Salesforce life-sciences solutions, clinical and R&D transformation, patient services, commercial operations, manufacturing, cybersecurity and managed services.

Representative engagement types: AI operating-model design; responsible-AI governance; clinical-development analytics; intelligent document processing; medical and regulatory content automation; personalized customer and patient engagement; cloud and enterprise-platform modernization; AI-enabled supply-chain and manufacturing transformation; managed analytics; workforce redesign; and large-scale systems integration. Accenture and Salesforce have also developed life-sciences-oriented data and AI capabilities for healthcare-professional, patient and commercial engagement.

3. BAIN & COMPANY

Global headquarters: Boston, Massachusetts, United States

Engagement geography: Global, with offices across North America, Latin America, Europe, the Middle East, Africa and Asia-Pacific.

Primary client types: Pharmaceutical and biotechnology companies, medical-technology companies, healthcare investors, private-equity sponsors, providers and payers.

AI and healthcare IT capabilities: Board-level AI strategy, digital operating models, portfolio and growth strategy, commercial transformation, organizational redesign, performance improvement and private-equity value creation.

Representative engagement types: AI investment prioritization; enterprise value-pool assessment; commercialization and launch strategy; portfolio planning; operating-model redesign; technology-adoption planning; commercial diligence; post-acquisition value creation; cost transformation; and executive capability building.

Bain is particularly relevant when the central requirement is strategic direction, enterprise economics or investor diligence. Technical engineering and regulated-platform implementation may be delivered with specialist technology partners. Bain identifies Boston as its corporate headquarters and maintains a broad global office network.

4. BOSTON CONSULTING GROUP AND BCG X

Global headquarters: Boston, Massachusetts, United States

Engagement geography: Global, with major life-sciences practices in the United States, Europe, Switzerland, the United Kingdom, Japan, China, Singapore, Australia, the Middle East and Latin America.

Primary client types: Global pharmaceutical companies, biotechnology firms, medical-technology manufacturers, diagnostics companies, providers, payers and healthcare investors.

AI and healthcare IT capabilities: BCG provides corporate and operating strategy, while BCG X supplies AI, data science, product engineering, design and digital-build capabilities.

Representative engagement types: Scientific AI and target discovery; multimodal and omics analytics; generative-AI product development; clinical-development optimization; supply-chain intelligence; commercial analytics; AI governance; data-product creation; operating-model transformation; digital therapeutics; and venture-building.

BCG X has publicly described generative-AI work with Merck involving target discovery and omics, illustrating its ability to combine strategic consulting with scientific and technical development.

5. CAPGEMINI

Global headquarters: Paris, France

Engagement geography: Global. Capgemini reports delivering life-sciences services in more than 40 countries.

Primary client types: Pharmaceutical, biotechnology, medical-device, diagnostics, consumer-health and life-sciences manufacturing organizations.

AI and healthcare IT capabilities: AI and data engineering, cloud transformation, intelligent automation, clinical and regulatory systems, manufacturing, laboratory informatics, quality, commercial technology, cybersecurity and managed services.

Representative engagement types: AI-enabled drug discovery; clinical-trial data platforms; regulatory and safety transformation; laboratory and scientific informatics; manufacturing execution systems; digital quality management; supply-chain analytics; customer engagement; enterprise cloud migration; validation; and managed technology operations.

Capgemini combines strategy, engineering and operational delivery. Its life-sciences practice addresses R&D, clinical development, regulatory operations, quality, manufacturing and commercialization, and it has participated in AI-driven drug-discovery initiatives.

6. CITIUSTECH

Principal North American office: Princeton, New Jersey, United States

Major operating and delivery base: Mumbai and other Indian technology centers

Engagement geography: North America, India, the United Kingdom, Middle East, Singapore, Poland and Switzerland, with additional international delivery.

Primary client types: Life-sciences companies, medical-technology firms, providers, payers, healthcare data companies and healthcare software vendors.

AI and healthcare IT capabilities: Healthcare-native AI, cloud and data modernization, interoperability, product engineering, regulated analytics, real-world evidence, medical-device software, intelligent imaging and healthcare consulting.

Representative engagement types: Secure and compliant AI deployment; AI governance and bias mitigation; RWE platform implementation; software-as-a-medical-device development; interoperability; FHIR and API programs; cloud data platforms; product modernization; clinical analytics; medical-device connectivity; and managed engineering.

CitiusTech reports serving more than 140 healthcare and life-sciences enterprises and maintains delivery locations in the United States, Canada, India, the United Kingdom, the UAE, Singapore, Poland and Switzerland. Its HealthSPARX platform supports RWE and regulated biopharma analytics.

7. COGNIZANT

Global headquarters: Teaneck, New Jersey, United States

Engagement geography: Global, with extensive delivery operations in North America, Europe, India and Asia-Pacific. Cognizant reports life-sciences manufacturing and laboratory capabilities spanning more than 30 countries.

Primary client types: Pharmaceutical and biotechnology manufacturers, medical-device companies, contract manufacturers, laboratories, providers and payers.

AI and healthcare IT capabilities: AI and generative AI, clinical and scientific technology, genomics, laboratory informatics, manufacturing, IT/OT integration, medical affairs, commercial systems and managed operations.

Representative engagement types: Drug-research analytics; clinical and genomic data platforms; intelligent laboratories; manufacturing execution and automation; predictive maintenance; AI-assisted patient and healthcare-professional engagement; cloud transformation; validation; data migration; and managed applications.

Cognizant's Health Sciences Innovation Center addresses drug research, genomics, Industry 4.0 and patient, provider and payer interactions. Its life-sciences delivery organization also supports manufacturing, laboratories and IT/OT modernization

8. DELOITTE

Global coordinating headquarters: London, United Kingdom

Engagement geography: Global through Deloitte member firms in the Americas, Europe, the Middle East, Africa and Asia-Pacific.

Primary client types: Pharmaceutical, biotechnology, medical-device and consumer-health companies; providers; payers; government agencies; research institutions; and healthcare investors.

AI and healthcare IT capabilities: AI and generative-AI strategy, scientific AI, data modernization, clinical-development transformation, commercial operations, patient services, cybersecurity, risk, tax, audit and transaction support.

Representative engagement types: AI governance; drug-discovery and molecular analytics; clinical-trial optimization; protocol design; enrollment and site analytics; agentic patient services; medical and regulatory content; enterprise cloud; data platforms; quality and manufacturing transformation; cyber risk; and M&A integration.

Deloitte has developed AI-enabled clinical-trial capabilities, life-sciences R&D offerings and scientific-AI assets using technologies such as NVIDIA BioNeMo. It also applies agentic AI to life-sciences patient-service operations.

9. EPAM SYSTEMS

Global headquarters: Newtown, Pennsylvania, United States

Engagement geography: North America, Europe, the United Kingdom, Switzerland, Central and Eastern Europe, India, Asia-Pacific and selected Middle Eastern markets.

Primary client types: Pharmaceutical and biotechnology companies, medical-device manufacturers, scientific-instrumentation firms, laboratories, healthcare software companies and providers.

AI and healthcare IT capabilities: Scientific software engineering, R&D informatics, laboratory informatics, clinical platforms, data engineering, AI orchestration, cloud, digital products, cybersecurity and real-world evidence.

Representative engagement types: Research-data platforms; bioinformatics; knowledge graphs; generative and agentic AI; digital laboratories; clinical-trial technology; medical-device software; data products; AI-compliance auditing; cloud engineering; and custom scientific applications.

EPAM expanded its real-world-data and real-world-evidence capabilities through its acquisition of Odysseus Data Services. Its life-sciences work combines scientific informatics, software engineering and AI implementation.

10. EY

Global headquarters: London, United Kingdom

Engagement geography: Global, including the Americas, Europe, the Middle East, Africa and Asia-Pacific.

Primary client types: Pharmaceutical and biotechnology companies, medical-device firms, providers, payers, consumer-health companies, public-sector organizations and private-equity investors.

AI and healthcare IT capabilities: AI-led transformation, data and analytics, quality intelligence, commercialization, enterprise systems, supply chain, operating-model design, cyber risk, tax, assurance and transaction advisory.

Representative engagement types: AI strategy and governance; commercial transformation; digital quality analytics; supply-chain and manufacturing intelligence; market entry; IT evaluation; M&A diligence; separation and integration; patient and provider engagement; enterprise data platforms; regulatory risk; and workforce transformation.

EY's life-sciences leaders publicly describe work with pharmaceutical, biotechnology, medical-technology and private-equity clients on AI-led transformation, commercialization and M&A. EY also offers quality-analytics capabilities through its QUADS life-sciences solution.

11. GUIDEHOUSE

Global headquarters: McLean, Virginia, United States

Engagement geography: United States and international markets through offices and delivery locations across North America, Europe, the Middle East and Asia.

Primary client types: Global biopharmaceutical companies, biotechnology firms, providers, payers, government health agencies, public-health organizations and research institutions.

AI and healthcare IT capabilities: AI-led professional services, life-sciences technology strategy, product-launch strategy, commercialization, enterprise transformation, government health, regulatory operations, data modernization and risk.

Representative engagement types: AI and technology roadmaps; product-launch optimization; commercial strategy; public-sector health modernization; data-platform implementation; reimbursement and market-access strategy; operating-model redesign; program management; regulatory transformation; and technology-enabled managed services.

Guidehouse describes itself as an AI-led professional-services firm and expanded its life-sciences practice in 2025 with dedicated technology-solutions and commercial-strategy leadership.

12. HCLTECH

Global headquarters: Noida, India

Engagement geography: Global, with operations in approximately 60 countries and major delivery presence in India, the United States, Europe, Latin America and Asia-Pacific.

Primary client types: Pharmaceutical, biotechnology, medical-device, healthcare and technology-platform companies.

AI and healthcare IT capabilities: AI advisory and engineering, data modernization, clinical and regulatory systems, scientific content, manufacturing, supply chain, cloud, infrastructure, cybersecurity and managed services.

Representative engagement types: Enterprise AI assessment; governance and security; literature and evidence summarization; drug-repurposing analytics; clinical and device-data platforms; intelligent document processing; cloud migration; infrastructure modernization; supply-chain analytics; and AI product engineering.

HCLTech describes an AI advisory model extending from assessment through production, governance and compliance. Its life-sciences digital services include generative-AI applications, drug-repurposing support and clinical and device-data management.

13. IBM CONSULTING

Global headquarters: Armonk, New York, United States

Engagement geography: Global, with substantial delivery across the United States, Canada, Europe, the Middle East, India, Japan, Asia-Pacific and Latin America.

Primary client types: Pharmaceutical, biotechnology, medical-device, provider, payer, government and public-health organizations.

AI and healthcare IT capabilities: Enterprise AI and watsonx, hybrid cloud, data governance, responsible AI, operating-model transformation, automation, cybersecurity, research informatics and managed services.

Representative engagement types: Generative-AI strategy; AI-center-of-excellence development; model governance; knowledge management; hybrid-cloud modernization; scientific and clinical data platforms; automated regulatory and medical content; enterprise process redesign; cybersecurity; and AI-enabled managed operations.

IBM reports tens of thousands of enterprise data and AI engagements and a large global consulting workforce. Its healthcare and life-sciences practice supports cloud modernization, enterprise operating-model change and AI-enabled transformation.

14. INFOSYS AND BASE LIFE SCIENCE

Global headquarters: Bengaluru, India

BASE Life Science principal base: Denmark

Engagement geography: Global. BASE maintains specialist European operations in Denmark, Switzerland, the United Kingdom, Germany, France, Italy and Spain, supported by Infosys' worldwide delivery network.

Primary client types: Pharmaceutical, biotechnology, medical-device and healthcare companies, particularly organizations using Veeva, Salesforce and regulated life-sciences platforms.

AI and healthcare IT capabilities: Data and AI, clinical-data programs, quality, regulatory compliance, customer engagement, cloud, enterprise applications, Veeva transformation and managed services.

Representative engagement types: Life-sciences data strategy; AI and analytics; Veeva implementation; CRM and customer engagement; clinical-data modernization; regulatory and quality systems; compliance; platform integration; managed applications; and European localization.

Infosys acquired BASE Life Science to deepen its dedicated life-sciences consulting, data, AI and cloud capabilities. BASE's public footprint includes multiple European countries and global client delivery.

15. KEARNEY

Global headquarters: Chicago, Illinois, United States

Engagement geography: Global, with offices throughout the Americas, Europe, the Middle East, Africa and Asia-Pacific.

Primary client types: Biopharmaceutical, biotechnology, medical-device, provider, payer, healthcare-system and private-equity clients.

AI and healthcare IT capabilities: Enterprise strategy, digital and data transformation, operations, procurement, supply chain, organizational design, commercialization, M&A and private-equity value creation.

Representative engagement types: AI opportunity and value-pool assessment; enterprise transformation; R&D and commercial operating models; supply-chain and manufacturing redesign; procurement analytics; digital-health strategy; transaction diligence; integration; cost transformation; and performance improvement.

Kearney's health practice spans biopharma R&D, commercialization, supply chain, providers, payers, medical technology and private-equity diligence. It is most appropriate where AI is part of a broader strategic, operating or transaction mandate rather than a stand-alone software-engineering assignment.

16. KPMG

Global headquarters: London, United Kingdom

Engagement geography: Global member-firm network. Major life-sciences delivery markets include the United States, Canada, the United Kingdom, continental Europe, Singapore, Japan, China, South Korea, India, Australia and the ASEAN countries.

Primary client types: Pharmaceutical, biotechnology, medical-device, provider, payer, government and investor organizations.

AI and healthcare IT capabilities: Trusted AI, AI governance, digital and technology transformation, cybersecurity, data analytics, customer engagement, strategy, transactions, compliance, risk and tax.

Representative engagement types: Responsible-AI frameworks; regulatory credibility and validation; data governance; commercial and medical engagement; Salesforce-enabled transformation; cybersecurity; enterprise architecture; transaction diligence; digital operating models; and risk-control design.

KPMG's Singapore life-sciences practice publicly describes work across Japan, China, South Korea and ASEAN. The firm also addresses trusted-AI governance and regulatory confidence for life-sciences organizations.

17. MCKINSEY & COMPANY AND QUANTUMBLACK, AI BY MCKINSEY

Global headquarters: New York, New York, United States

Engagement geography: Global, including major pharmaceutical and biotechnology markets in North America, Europe, Switzerland, the United Kingdom, India, China, Japan, Singapore and the Middle East.

Primary client types: Pharmaceutical, biotechnology, medical-technology, contract research, provider, payer, public-health and investor organizations.

AI and healthcare IT capabilities: Scientific AI, enterprise AI, advanced analytics, digital strategy, operating-model design, product development, data architecture, performance transformation and investor diligence.

Representative engagement types: Foundation models for life sciences; causal inference; knowledge graphs; molecular and biological-pathway analysis; clinical-development optimization; AI product strategy; enterprise AI transformation; technology strategy; organization and talent; and due diligence.

QuantumBlack combines data scientists, engineers and designers with McKinsey's strategic consulting. McKinsey's scientific-AI work addresses molecular, biological and patient data, while its life-sciences practice serves pharmaceutical, biotechnology, medical-technology and CRO clients.

18. NTT DATA

Global headquarters: Tokyo, Japan

Engagement geography: Global, with operations in more than 50 countries and delivery across Japan, North America, Europe, India, Asia-Pacific and Latin America.

Primary client types: Pharmaceutical, biotechnology, medical-device, provider, payer and public-health organizations.

AI and healthcare IT capabilities: R&D strategy, generative AI, medical imaging, synthetic data, clinical development, intelligent document processing, cloud, enterprise applications, data platforms, infrastructure and managed services.

Representative engagement types: Drug-development process optimization; GenAI roadmaps; clinical-trial analytics; medical-imaging AI; synthetic-data programs; regulatory document automation; laboratory modernization; cloud migration; enterprise architecture; SAP transformation; and managed operations.

NTT DATA's life-sciences R&D advisory services include technology implementation, drug-development optimization, digital health, generative-AI roadmaps, medical imaging and clinical-trial optimization.

19. OLIVER WYMAN

Global headquarters: New York, New York, United States

Engagement geography: Global, with life-sciences expertise across the United States, Europe, Switzerland, Germany, the United Kingdom, India, Southeast Asia and selected Middle Eastern markets.

Primary client types: Pharmaceutical, biotechnology, CDMO, medical-device, pharmacy, payer, provider and public-sector health organizations.

AI and healthcare IT capabilities: Corporate and growth strategy, innovation, AI strategy, commercial transformation, operating models, portfolio strategy, pharmacy technology and healthcare-system transformation.

Representative engagement types: AI-enabled innovation strategy; portfolio and indication strategy; commercial-model redesign; digital ecosystem strategy; market entry; global expansion; M&A; operating-model transformation; pharmacy and specialty-care technology; and public-health transformation.

Oliver Wyman publicly identifies pharmaceutical, biotechnology, CDMO, medical-device and public-health engagements involving AI, new technologies, digital ecosystems and international growth. Its life-sciences leaders report client work extending from the United States and Europe to India and Southeast Asia.

20. PA CONSULTING

Global headquarters: London, United Kingdom

Engagement geography: United Kingdom, United States, the Netherlands, Nordic countries and broader European and international markets.

Primary client types: Pharmaceutical, biotechnology, medical-device, provider, payer, regulator, government, public-health and healthcare-technology organizations.

AI and healthcare IT capabilities: Strategy, innovation, product development, AI, digital and data transformation, clinical technology, regulatory affairs, medical devices, cybersecurity and complex-program delivery.

Representative engagement types: AI strategy and product innovation; digital clinical trials; connected medical devices; digital surgery; data and analytics; regulatory and quality transformation; cybersecurity; operating-model redesign; service design; and large-scale program leadership.

PA Consulting's healthcare and life-sciences practice serves biopharma, medical-technology, healthcare, insurance, regulatory and government clients. Its public work combines strategy, science, engineering, digital, AI and complex implementation.

21. PWC AND STRATEGY&

Global coordinating headquarters: London, United Kingdom

Engagement geography: PwC operates through a network spanning more than 130 countries and territories.

Primary client types: Pharmaceutical, biotechnology, medical-device, healthcare, consumer-health, public-sector and investor organizations.

AI and healthcare IT capabilities: Enterprise AI, data strategy, clinical development, commercial and patient engagement, cloud, cybersecurity, risk, tax, transactions and operating-model transformation.

Representative engagement types: AI-enabled protocol design and patient enrollment; clinical-resource optimization; intelligent R&D; HCP, HCO and patient engagement; managed commercial operations; enterprise data platforms; AI governance; technology strategy; M&A diligence; and post-transaction integration.

Strategy& adds corporate, portfolio and technology strategy to PwC's implementation, assurance and transaction capabilities. PwC publicly describes AI-enabled clinical-trial services and AI-supported commercial and patient-engagement operations.

22. TATA CONSULTANCY SERVICES

Global headquarters: Mumbai, India

Engagement geography: Global, with major delivery in India, the United States, Canada, the United Kingdom, continental Europe, Japan, Asia-Pacific, Latin America and the Middle East.

Primary client types: Global pharmaceutical, biotechnology, medical-device, healthcare and consumer-health organizations.

AI and healthcare IT capabilities: Scientific AI, laboratory transformation, clinical technology, pharmacovigilance, regulatory operations, manufacturing, supply chain, enterprise applications, cloud, data engineering and managed services.

Representative engagement types: AI-enabled drug design; laboratory modernization; clinical-trial platforms; automated safety-case processing; regulatory content; RWE analytics; manufacturing and supply-chain intelligence; ERP transformation; M&A IT separation and integration; and managed operations.

TCS publicly describes AI across drug design, laboratory research, preclinical and clinical development, safety, regulatory operations and real-world evidence.

23. WIPRO

Global headquarters: Bengaluru, India

Engagement geography: Global, with substantial operations across India, North America, Europe, the United Kingdom, Japan, Asia-Pacific and the Middle East.

Primary client types: Pharmaceutical, biotechnology, medical-device, provider, payer and consumer-health organizations.

AI and healthcare IT capabilities: AI and automation, laboratory transformation, clinical and safety operations, regulatory affairs, manufacturing, supply chain, commercial systems, cloud, infrastructure and managed services.

Representative engagement types: AI-enabled regulatory operations; intelligent pharmacovigilance; patient engagement; laboratory-of-the-future programs; clinical data and automation; manufacturing and quality systems; cloud migration; enterprise applications; and global managed operations.

Wipro's life-sciences services span research, clinical operations, safety, regulatory affairs, manufacturing, supply chain and commercialization. Its life-sciences leadership reports experience across the United States, Europe and Japan.

C

LIFE-SCIENCES-SPECIALIST STRATEGY,
DATA, R&D AND COMMERCIALIZATION
FIRMS

24. ALCIMED AND NAUTILUS.AI

Global headquarters: Paris, France

Engagement geography: United States, France, Germany, Switzerland, the United Kingdom, Belgium, Italy, Spain and Singapore, with international client assignments beyond office locations.

Primary client types: Large pharmaceutical companies, biotechnology firms, emerging companies, medical-device manufacturers, public institutions and research organizations.

AI and healthcare IT capabilities: Innovation strategy, market exploration, R&D transformation, AI-provider scouting, digital-health strategy and customized AI tools through Nautilus.ai.

Representative engagement types: AI opportunity identification; R&D and translational-intelligence tools; scientific and competitive intelligence; customer-journey analysis; digital transformation; new-market entry; technology scouting; AI partner selection; HEOR support; and innovation-program design.

Nautilus.ai supports executive and operational functions including R&D, translational medicine, medical affairs, commercial operations, insights and HEOR. Alcimed reports eight offices across the United States, Europe and Singapore.

25. ARCONDIS

Global headquarters: Allschwil, Switzerland, in the Basel life-sciences region

Engagement geography: Switzerland, Germany, Slovakia, Malaysia, Singapore, the United States and broader European, North American and Asia-Pacific markets.

Primary client types: Pharmaceutical, biotechnology, medical-device, diagnostics, healthcare and life-sciences startup organizations.

AI and healthcare IT capabilities: AI strategy and agents, data engineering, cloud and DevOps, digital quality, GxP technology, regulatory systems, laboratory and manufacturing technology and operational transformation.

Representative engagement types: AI strategy; AI-agent deployment; GxP-compliant automation; data and cloud architecture; computer-system validation; regulatory and quality transformation; laboratory informatics; manufacturing systems; IT operating models; and managed services.

Arcondis describes itself as exclusively focused on life sciences and healthcare, with more than 250 specialists and delivery across Europe, North America and Asia-Pacific.

26. BLUE MATTER

Principal headquarters: San Francisco, California, United States

Engagement geography: North America, Europe and Asia, with offices or delivery locations including San Francisco, New York, Boston, London, Berlin, Zurich, Mumbai and Pune.

Primary client types: Top global pharmaceutical companies, emerging biotechnology firms, digital-health companies and healthcare investors.

AI and healthcare IT capabilities: R&D and commercial strategy, advanced analytics, primary market research, digital solutions, generative AI and technology-enabled decision support.

Representative engagement types: Product and portfolio strategy; indication prioritization; launch strategy; market access; medical affairs; commercialization; analytics platforms; generative-AI tools; primary research; organizational design; and investor support.

Blue Matter combines specialist life-sciences strategy with data, analytics and technology. Its Twine platform incorporates advanced analytics and generative AI, and the firm expanded its technology capabilities through its acquisition of India-based Spekle.

27. CATENION

Global headquarters: Berlin, Germany

Engagement geography: International engagements with pharmaceutical and biotechnology clients in Europe, North America and Asia-Pacific.

Primary client types: Research-based pharmaceutical companies, biotechnology companies, platform companies and life-sciences investors.

AI and healthcare IT capabilities: Science-driven strategy, bioinformatics, computational biology, disease and technology mapping, portfolio analytics and data-supported R&D decision-making.

Representative engagement types: Corporate and R&D strategy; therapeutic-area strategy; target and indication prioritization; disease mapping; portfolio optimization; clinical-development strategy; asset and company screening; due diligence; technology assessment; and risk-adjusted forecasting.

Catenion is primarily a scientific and strategic adviser rather than a large systems integrator. Its teams combine life-sciences PhDs with bioinformatics, computational-biology and data-engineering capabilities.

28. CLARKSTON CONSULTING

Global headquarters: Durham, North Carolina, United States

Engagement geography: Primarily North America, with international programs for global pharmaceutical, biotechnology, medical-device and consumer-products clients.

Primary client types: Life-sciences manufacturers, emerging biotechnology firms, medical-device companies and consumer-health organizations.

AI and healthcare IT capabilities: AI and analytics strategy, data architecture, enterprise applications, SAP, supply chain, quality, commercialization, program management and change management.

Representative engagement types: AI use-case design; data governance and architecture; AI operating models; adoption and change management; ERP and SAP transformation; supply-chain analytics; quality systems; commercialization; master data; and program recovery.

Clarkston supports AI from strategy through implementation and organizational adoption. It has also developed AI-agent concepts for life-sciences research activities such as target-of-interest discovery.

29. CLEARVIEW HEALTHCARE PARTNERS

Global headquarters: Boston, Massachusetts, United States

Engagement geography: North America and Europe, with offices in Boston, London and Zurich and assignments for global biopharmaceutical sponsors.

Primary client types: Pharmaceutical, biotechnology, medical-device and diagnostics companies, including emerging and established innovators.

AI and healthcare IT capabilities: Life-sciences strategy, advanced analytics, data science, biomedical intelligence, portfolio strategy and commercialization.

Representative engagement types: Asset and portfolio strategy; indication prioritization; product development; launch planning; market access; commercial strategy; disease-area intelligence; advanced analytics; and AI-supported biomedical research.

ClearView combines scientific and commercial consulting with data science. Its investment in Epistemic AI expanded its ability to integrate enterprise biomedical AI into life-sciences research and decision-making.

30. ERANEOS

Global headquarters: Zurich, Switzerland

Engagement geography: Switzerland, Germany, Austria, the Netherlands, Spain and Nordic and broader European markets, with selected global client programs.

Primary client types: Pharmaceutical, biotechnology, healthcare, medical-device and regulated-industry organizations.

AI and healthcare IT capabilities: AI strategy, generative AI, data science, enterprise architecture, Veeva, clinical and regulatory systems, quality, cybersecurity and sourcing.

Representative engagement types: AI roadmaps; clinical and commercial AI use cases; regulatory-compliant AI implementation; data governance; master-data management; business intelligence; Veeva Development Cloud; IT strategy; cybersecurity; sourcing; and program management.

Eraneos combines management consulting and technology delivery. Its life-sciences work includes clinical, regulatory and quality platforms, while its AI services address drug development, diagnosis, clinical-trial inclusion and commercial operations.

31. EVERSANA

Global headquarters: Chicago, Illinois, United States

Engagement geography: North America, Europe and selected Asia-Pacific and Middle Eastern markets. Prospective clients should confirm current regional advisory coverage because parts of EVERSANA's former APAC and Middle East advisory operation were transferred to Trinity Life Sciences in 2025.

Primary client types: Emerging biotechnology companies, specialty and global pharmaceutical companies, medical-device firms and established brands.

AI and healthcare IT capabilities: Commercialization, market access, patient services, medical affairs, regulatory and safety operations, omnichannel engagement, content, data and analytics.

Representative engagement types: Launch strategy and execution; AI-enabled medical and regulatory review; personalized content; field-force intelligence; patient-support automation; market access; HEOR; pharmacovigilance; commercialization outsourcing; and brand performance.

EVERSANA describes a client base extending from startups to established pharmaceutical manufacturers and uses AI across commercialization, medical and regulatory content, patient services and field operations.

32. IQVIA

Global headquarters: Durham, North Carolina, United States

Engagement geography: More than 100 countries, with major regional hubs throughout North America, Europe, Asia-Pacific, Latin America, the Middle East and Africa.

Primary client types: Global and emerging biopharma, biotechnology, consumer-health, medical-device and diagnostics companies; providers; payers; public-health agencies; research organizations; and investors.

AI and healthcare IT capabilities: Clinical development, healthcare-grade AI, agentic AI, real-world data and evidence, commercialization, safety, regulatory affairs, market access, technology platforms and managed operations.

Representative engagement types: Protocol and site optimization; patient identification; decentralized and hybrid trials; RWE and HEOR; commercial analytics; safety and regulatory operations; data products; AI governance; medical affairs; and end-to-end outsourced development.

IQVIA reports operations in more than 100 countries and combines large healthcare datasets, technology, consulting and clinical-research services. Clients should consider both the breadth of its data and execution capabilities and the potential implications of engaging a provider that participates across multiple stages of the development and commercialization lifecycle.

33. KX ADVISORS

Global headquarters: Washington, District of Columbia, United States

Additional offices: Boston, Massachusetts, and London, United Kingdom

Engagement geography: North America, the United Kingdom, Europe and cross-border healthcare and life-sciences markets.

Primary client types: Pharmaceutical, biotechnology, medical-device, diagnostics, health IT, digital-health and investor clients.

AI and healthcare IT capabilities: Market and product strategy involving AI, machine learning, clinical decision support, EHRs, interoperability, payer technology, RWE, trial informatics and laboratory automation.

Representative engagement types: Market assessment; product planning; go-to-market strategy; pricing; forecasting; segmentation; M&A strategy; commercial diligence; opportunity assessment; competitive intelligence; and digital-health business strategy.

Kx Advisors is a specialist healthcare strategy firm rather than a general-purpose implementation company. Its digital-health coverage explicitly includes AI and machine learning, EHRs, interoperability, RWE, clinical-trial informatics and laboratory automation.

34. L.E.K. CONSULTING

Global headquarters: London, United Kingdom

Engagement geography: Global, with major healthcare and life-sciences hubs in Boston, London, continental Europe, Singapore, Tokyo and Australia.

Primary client types: Pharmaceutical, biotechnology, diagnostics, medical-device, healthcare-services and private-equity clients.

AI and healthcare IT capabilities: Corporate and portfolio strategy, biomedical intelligence, digital-health strategy, commercial assessment, forecasting and transaction support.

Representative engagement types: Growth strategy; opportunity assessment; asset valuation; indication prioritization; portfolio optimization; acquisition screening; commercial due diligence; product strategy; market access; and technology-enabled competitive intelligence.

L.E.K. is especially relevant where AI or digital-health assets require commercial validation, portfolio evaluation or investment diligence. It is principally a strategy and transaction adviser rather than a large-scale systems integrator.

35. PAREXEL AND PAREXELAI

Global headquarters: Durham, North Carolina, United States

Engagement geography: Global clinical-development and regulatory operations across North America, Europe, Asia-Pacific, Latin America, the Middle East and Africa.

Primary client types: Global biopharma, emerging biotechnology, medical-device companies, clinical-research sites and healthcare innovators.

AI and healthcare IT capabilities: AI-supported clinical development, regulatory strategy, trial operations, pharmacovigilance, real-world evidence, market access and scientific consulting.

Representative engagement types: AI-enabled trial design; patient and site identification; clinical operations; regulatory submissions; evidence generation; safety surveillance; market access; data management; AI policy and governance; and outsourced development.

Parexel launched ParexelAI in 2026 to provide AI services across the clinical-development lifecycle. The company reports more than 22,000 employees globally and extensive experience supporting regulatory submissions and product approvals.

36. PHARMALEX, A CENCORA COMPANY

Global headquarters: Friedrichsdorf, Germany

Engagement geography: Europe, North America, Asia-Pacific and other major regulated life-sciences markets through PharmaLex and Cencora.

Primary client types: Pharmaceutical, biotechnology, medical-device, consumer-health and combination-product companies.

AI and healthcare IT capabilities: Regulatory affairs, quality, CMC, pharmacovigilance, R&D IT, data strategy, laboratory informatics, advanced analytics and systems integration.

Representative engagement types: Regulatory-information management; submission systems; safety platforms; quality-management systems; laboratory informatics; data governance; advanced analytics; validation; compliance; R&D technology strategy; and managed regulatory operations.

PharmaLex's technology consulting incorporates specialist laboratory and scientific-informatics capabilities associated with OSTHUS. Its ownership by Cencora also gives it access to broader pharmaceutical services and commercialization infrastructure.

37. QUANTORI

Global headquarters: Cambridge, Massachusetts, United States

Engagement geography: Global, with North American and European leadership and distributed engineering, data-science and scientific-informatics teams.

Primary client types: Pharmaceutical, biotechnology, TechBio, healthcare, medical-device, research-institution and scientific-software organizations.

AI and healthcare IT capabilities: Agentic AI, scientific software, bioinformatics, R&D informatics, laboratory informatics, cloud, high-performance computing, knowledge graphs, data engineering and clinical informatics.

Representative engagement types: AI ecosystems for R&D; molecular and genomic computing; scientific knowledge management; laboratory platforms; research-data infrastructure; agentic workflows; cloud HPC; custom scientific software; clinical and healthcare informatics; and regulated product engineering.

Quantori reports more than 750 specialists and over 1,000 completed projects. Its Q-Suite platform applies agentic AI to biopharma R&D, knowledge management and infrastructure, while its services span AI, data science, bioinformatics and scientific software.

38. SIA PARTNERS AND SIA-LBG

Global headquarters: Paris, France

Engagement geography: Sia Partners reports approximately 3,000 consultants across nearly 50 locations in 19 countries. Sia-LBG has established operations in the United States and Europe and supports international life-sciences programs.

Primary client types: Pharmaceutical and biotechnology companies, CROs, academic institutions, medical-device and diagnostics companies, healthcare organizations, government agencies and NGOs.

AI and healthcare IT capabilities: AI agents, data science, product development, regulatory and scientific strategy, digital transformation, operating models and non-dilutive funding.

Representative engagement types: AI-agent design; scientific and product strategy; clinical and regulatory planning; data analytics; operating-model transformation; program leadership; BARDA, NIH, DoD and CEPI funding strategy; due diligence; and market expansion.

Sia Partners maintains an AI-agent portfolio across industries, including healthcare and life sciences. Its Sia-LBG operation adds scientific, clinical, regulatory and product-development expertise.

39. SIMON-KUCHER

Global headquarters: Bonn, Germany

Engagement geography: More than 30 countries, with major life-sciences operations throughout North America, Europe, Asia-Pacific and the Middle East.

Primary client types: Pharmaceutical, biotechnology, medical-device, diagnostics, health IT, digital-health and investor organizations.

AI and healthcare IT capabilities: Commercial AI, pricing, revenue growth, digital-health monetization, data strategy, AI use-case design, product development and customer engagement.

Representative engagement types: Pricing and market access; launch strategy; commercial model design; AI-enabled customer segmentation; digital-health offer design; software and data monetization; product packaging; sales effectiveness; market entry; and growth strategy.

Simon-Kucher's healthcare and life-sciences work is particularly suited to monetization and commercial-value questions. The firm reports conducting numerous health IT and digital-health projects involving offer design, pricing and data monetization.

40. SYNEOS HEALTH CONSULTING

Global headquarters: Morrisville, North Carolina, United States

Engagement geography: Global, with clinical, commercial and consulting delivery throughout North America, Europe and Asia-Pacific.

Primary client types: Global and emerging biopharmaceutical companies, biotechnology firms and medical-device organizations.

AI and healthcare IT capabilities: Digital health, advanced analytics, machine learning, RWE, commercialization, medical affairs, clinical development, safety and technology-enabled consulting.

Representative engagement types: AI-enabled clinical development; commercial analytics; omnichannel engagement; RWE; launch strategy; medical-affairs transformation; patient engagement; safety operations; data platforms; and outsourced clinical and commercial execution.

Syneos combines consulting with clinical and commercial outsourcing. Its Kinetic platform and digital-health capabilities use analytics and machine learning, and the company has established an AI hub in Hyderabad supporting clinical development, safety and commercialization.

41. TRINITY LIFE SCIENCES

Global headquarters: Waltham, Massachusetts, United States

Engagement geography: North America, Europe, Asia-Pacific, the Middle East and Latin America. Publicly identified locations include the United States, United Kingdom, Germany, India, Singapore, Japan, China, Australia, Dubai and Mexico City.

Primary client types: Global pharmaceutical companies, emerging biotechnology firms, medical-device companies and healthcare investors.

AI and healthcare IT capabilities: Commercialization, market access, medical affairs, advanced analytics, digital twins, AI-supported forecasting and technology-enabled decision support.

Representative engagement types: Product and portfolio strategy; launch planning; market access; pricing; forecasting; medical-affairs strategy; commercial analytics; AI-enabled customer intelligence; digital twins; primary research; and organizational design.

Trinity reports more than 1,000 professionals, a presence across five continents and hundreds of global clients. Its 2025 acquisition of EVERSANA's APAC and Middle East advisory operations substantially expanded its geographic footprint.

42. VEEVA BUSINESS CONSULTING

Global headquarters: Pleasanton, California, United States

Engagement geography: Global, supporting pharmaceutical and biotechnology clients in North America, Europe, Asia-Pacific and other major life-sciences markets.

Primary client types: Pharmaceutical, biotechnology, contract-research, medical-affairs, regulatory, quality and commercial organizations using or evaluating Veeva platforms.

AI and healthcare IT capabilities: Life-sciences cloud applications, AI agents, clinical, regulatory, safety, quality, commercial, medical and content operations.

Representative engagement types: Digital operating models; Veeva platform strategy and implementation; clinical and regulatory transformation; safety and quality systems; CRM; medical affairs; promotional content; data strategy; AI agents; and process redesign.

Veeva combines software, data and consulting. Its business-consulting organization reports hundreds of consultants globally, and its AI-agent strategy extends across commercial, clinical, regulatory, safety and quality workflows. Because Veeva is also the platform vendor, clients seeking technology-neutral selection advice should distinguish product consulting from independent vendor evaluation.

43. ZS

Global headquarters: Evanston, Illinois, United States

Engagement geography: Global, with more than 30 offices across North America, Europe and Asia-Pacific.

Primary client types: Global and emerging pharmaceutical, biotechnology, medical-technology and healthcare companies.

AI and healthcare IT capabilities: Commercial analytics, agentic AI, R&D strategy, medical affairs, market access, customer engagement, data platforms and operating-model transformation.

Representative engagement types: AI-enabled commercialization; sales and marketing analytics; customer segmentation; next-best action; R&D operating models; clinical-development analytics; medical-affairs strategy; market access; forecasting; and data-product implementation.

ZS' ZAIIDYN platform supports AI-enabled life-sciences workflows, and its R&D consulting includes data, digital health and AI-enabled transformation. ZS is especially strong in commercial, medical and market-access analytics, while its R&D practice expands its reach earlier in the product lifecycle.

D REGIONAL AND COUNTRY-LED AI AND LIFE-SCIENCES ADVISORY FIRMS

44. ABEAM CONSULTING

Global headquarters: Tokyo, Japan

Engagement geography: Japan and Asia-Pacific, with broader international support through offices and alliances in Southeast Asia, China, Europe and the Americas.

Primary client types: Japanese and multinational pharmaceutical, biotechnology, healthcare, medical-device and consumer organizations.

AI and healthcare IT capabilities: Digital transformation, data and AI, Salesforce Life Sciences Cloud, ERP, commercial operations, process transformation and regional systems implementation.

Representative engagement types: Japan-market technology strategy; Salesforce and CRM transformation; commercial operations; ERP modernization; data and analytics; enterprise AI; regulatory localization; operating-model redesign; and regional rollout management.

ABeam is particularly relevant to organizations requiring Japan-specific business, technology and cultural expertise combined with Asia-Pacific implementation capability. The firm received Salesforce Japan recognition for Healthcare and Life Sciences transformation work in 2026.

45. BEARINGPOINT

Global headquarters: Amsterdam, Netherlands

Engagement geography: Primarily Europe, with strong operations in Ireland, the United Kingdom, Germany, Switzerland, France, the Netherlands, the Nordic countries and other EU markets.

Primary client types: Pharmaceutical, biotechnology, medical-device, healthcare, public-sector and regulated-industry organizations.

AI and healthcare IT capabilities: AI strategy, data governance, IT architecture, regulatory transformation, enterprise applications, supply chain, operating models and European compliance.

Representative engagement types: European AI governance; data and analytics strategy; enterprise architecture; cloud transformation; regulatory and quality systems; supply-chain modernization; commercial operations; program management; and EU-country implementation.

BearingPoint is most relevant to European and country-level programs requiring familiarity with EU regulatory, privacy and operating requirements. Its Ireland and European life-sciences practices address data governance, technology architecture and AI-enabled transformation.

46. NOMURA RESEARCH INSTITUTE

Global headquarters: Tokyo, Japan

Engagement geography: Japan, China and broader Asia, with cross-border assignments involving North America and Europe.

Primary client types: Pharmaceutical, biotechnology, medical-technology, healthcare, public-sector and investor organizations.

AI and healthcare IT capabilities: Japan and Asia market strategy, AI consulting, digital transformation, IT strategy, commercial operations, cross-border M&A and healthcare-policy analysis.

Representative engagement types: Japan-market entry; pharmaceutical commercial strategy; digital and IT roadmaps; generative-AI operating-model transformation; omnichannel engagement; overseas plant and product-license transfers; China strategy; restructuring; cross-border M&A; and public-sector healthcare planning.

NRI's healthcare work includes pharmaceutical, medical-technology and life-sciences strategy, including China investment and restructuring. Its AI consulting addresses changes to business processes, operating models and enterprise decision-making.

ENGAGEMENT-TYPE SHORTLISTING GUIDE

The following groupings provide a practical starting point for organizations constructing a request for information or request for proposal. They are not performance rankings.

Enterprise AI Strategy, Governance and Operating Models

Applied Artificial Intelligence LLC; Accenture; Bain; BCG; Deloitte; EY; Guidehouse; IBM Consulting; Kearney; KPMG; McKinsey/QuantumBlack; Oliver Wyman; PA Consulting; PwC/Strategy&; Sia Partners.

Scientific AI, Drug Discovery and R&D Informatics

BCG X; Capgemini; Cognizant; Deloitte; EPAM; IBM Consulting; McKinsey/QuantumBlack; NTT DATA; Quantori; TCS; Catenion; ClearView; IQVIA.

Clinical Development and Trial Technology

Accenture; Capgemini; Cognizant; Deloitte; IQVIA; NTT DATA; Parexel; PA Consulting; Syneos Health; TCS; Veeva; ZS.

Regulatory Affairs, Quality and Pharmacovigilance

Arcondis; Deloitte; EY; Infosys/BASE; IQVIA; KPMG; PA Consulting; Parexel; PharmaLex; TCS; Veeva; Wipro.

Laboratory, Manufacturing and Supply-Chain AI

Accenture; Capgemini; Cognizant; HCLTech; Infosys/BASE; Kearney; NTT DATA; Quantori; TCS; Wipro; Clarkston; Arcondis.

Commercial, Medical Affairs and Patient Engagement AI

Accenture; Deloitte; EVERSANA; IQVIA; PwC; Simon-Kucher; Syneos Health; Trinity Life Sciences; Veeva; ZS; Blue Matter; ClearView.

Market Access, HEOR and Real-World Evidence

EVERSANA; IQVIA; Kx Advisors; Parexel; Syneos Health; Trinity Life Sciences; ZS; ClearView; Blue Matter.

Cloud, Data Engineering and AI Product Development

Accenture; BCG X; Capgemini; CitiusTech; Cognizant; EPAM; HCLTech; IBM; Infosys; NTT DATA; Quantori; TCS; Wipro.

M&A, Commercial Diligence and Investor Advisory

Bain; BCG; EY; Kearney; L.E.K.; McKinsey; Oliver Wyman; PwC/Strategy&; Kx Advisors; ClearView; Blue Matter; Catenion.

Interim Leadership and Program Recovery

Applied Artificial Intelligence LLC; Accenture; Clarkston; Deloitte; Guidehouse; IBM Consulting; PA Consulting; PwC; Sia Partners.

Japan and Asia-Pacific Market Programs

ABeam Consulting; NRI; IQVIA; NTT DATA; Trinity Life Sciences; KPMG Singapore; Infosys/BASE; Wipro; TCS.

European and Country-Specific Programs

Alcimed; Arcondis; BearingPoint; Catenion; Eraneos; Infosys/BASE; PA Consulting; PharmaLex; Simon-Kucher; Sia Partners.

ADVISOR-SELECTION CONSIDERATIONS

Organizations evaluating an AI or healthcare IT adviser should request documented evidence concerning:

1. Experience in the exact therapeutic, scientific, clinical or operational domain;
2. Country-specific regulatory and market knowledge;
3. Ability to operate within GxP, privacy, cybersecurity and validation requirements;
4. AI model governance, monitoring, explainability and human oversight;
5. Ownership and permitted reuse of client data, prompts, models and generated intellectual property;
6. Technology-vendor independence and commercial alliances;
7. Experience moving AI applications from pilot to validated production;
8. Integration with laboratory, clinical, regulatory, safety, manufacturing and commercial platforms;
9. Availability of senior personnel throughout the engagement;
10. Use of offshore or subcontracted delivery resources;
11. Post-deployment support, model monitoring and change management;
12. Quantifiable financial, scientific, clinical or operational outcomes;
13. References from comparable client organizations;
14. Conflict-of-interest and data-separation controls;
15. Business-continuity, cybersecurity and incident-response practices;
16. Ability to transfer knowledge to internal client teams;
17. Fee structure, milestone accountability and performance incentives; and
18. Willingness to support independent outcome and client-satisfaction measurement.

TOP ADVISORY AND CONSULTING VENDOR PERFORMERS ACROSS 29 LIFE SCIENCES AI AND HEALTHCARE IT ENGAGEMENT CATEGORIES

The table below converts the advisory directory into engagement categories and identifies the **current best-fit capability leader** in each. These designations are based on demonstrated specialization, platform depth, domain expertise, delivery scale and publicly documented life sciences capabilities.

No.	Life Sciences AI and Healthcare IT Engagement Category	Current Top Vendor Performer	Primary Performance Differentiator
1	Enterprise AI Strategy and Transformation	Accenture	Broad enterprise-scale capabilities spanning life sciences AI, clinical development, pharmacovigilance, commercial engagement, supply chain, data and technology transformation.
2	Responsible AI Governance, Model Risk and Compliance	Deloitte	Strong integration of AI strategy, governance, cloud, data management, risk controls and multinational life sciences transformation.
3	AI Financial Business Cases, Interim Leadership and Program Recovery	Applied Artificial Intelligence LLC	Specialist financial and technological assessment combined with temporary or fractional leadership of AI engagements, projects and initiatives.
4	Generative AI and Agentic AI Enterprise Deployment	IBM Consulting	Responsible and scalable AI strategy, governance, architecture, data readiness, watsonx integration and enterprise agentic-AI deployment.
5	Cloud, Data and AI Architecture Modernization	Accenture	Ability to connect cloud, data, artificial intelligence and operating-model modernization across global pharmaceutical and biotechnology organizations.
6	Scientific AI and Drug Discovery	BCG X	Combines biopharma strategy with data science, omics analytics, algorithm development and AI-supported drug-target discovery.
7	Bioinformatics, Computational Biology and Multiomics	Quantori	Deep scientific-software, bioinformatics, molecular-modeling, genomics, high-performance computing and life sciences-specific agentic-AI capabilities.
8	R&D Informatics and Scientific Knowledge Management	Tata Consultancy Services	Strong R&D data foundations, platform modernization, scientific applications, GenAI, regulatory technology and global implementation capacity.
9	Clinical Trial Design and Protocol Optimization	IQVIA	Integration of healthcare data, artificial intelligence, analytics, clinical-development technology and trial-optimization services.
10	Clinical Operations, Site Selection and Patient Recruitment	ParexelAI	AI-enabled site selection, patient identification, study execution, clinical operations and human-supervised trial acceleration.
11	Clinical Data Management, Biostatistics and Trial Analytics	IQVIA	Connected clinical data, technology and analytics supporting trial decisions, risk reduction and development acceleration.
12	Regulatory Affairs and Regulatory Information Management	PharmaLex, a Cencora Company	Specialized regulatory expertise supported by AI-assisted product-information comparison, regulatory intelligence and automated document workflows.
13	Pharmacovigilance, Safety and Signal Detection	ParexelAI	AI-supported literature screening, adverse-event case processing, safety operations, regulatory automation and post-market surveillance.
14	Quality Management, GxP and Computer System Validation	Arcondis	Life sciences-focused GxP lifecycle automation, validation, traceability, cloud, software testing and regulated digital-transformation expertise.
15	Laboratory Informatics and Smart-Lab Transformation	Cognizant	Strong ELN, LIMS, high-throughput screening, laboratory automation, scientific-data integration and AI-enabled research operations.

No.	Life Sciences AI and Healthcare IT Engagement Category	Current Top Vendor Performer	Primary Performance Differentiator
16	Manufacturing AI, MES and Industry 4.0	Capgemini	Intelligent operations integrating manufacturing, quality, supply chain, data architecture, AI, engineering and life sciences digital transformation.
17	Life Sciences Supply Chain, Procurement and Demand Analytics	Kearney	Strong operating-model, procurement, supply-network, transformation and performance-improvement capabilities across biopharma and MedTech.
18	Real-World Data, Real-World Evidence and HEOR	IQVIA	Large-scale healthcare data, real-world evidence generation, analytics, artificial intelligence and global life sciences market reach.
19	Medical Affairs and Scientific Engagement	ZS	Purpose-built agentic AI for medical insights, evidence generation, care-gap analysis, opinion-leader intelligence and scientific engagement.
20	Commercial Analytics, Segmentation and Next-Best Action	ZS	Life sciences-trained AI supporting field planning, customer analytics, segmentation, next-best action, sales execution and incentive management.
21	CRM, Omnichannel and Healthcare-Professional Engagement	Veeva Business Consulting	Life sciences-specific CRM, embedded AI agents, customer engagement, commercial workflows, process design and change-management support.
22	Patient Services, Access, Adherence and Engagement	EVERSANA	Integrated commercialization and patient-experience services supported by AI, digital technology, market access, medical information and global delivery.
23	Market Access, Pricing and Reimbursement	Simon-Kucher	Specialized pharmaceutical pricing, launch sequencing, reimbursement, market access, value communication and international commercialization strategy.
24	Cybersecurity, Privacy and AI Security	KPMG	AI-enabled threat detection, data protection, identity, third-party risk, GxP-aligned security testing and protection of research intellectual property.
25	Digital Health, MedTech and Software as a Medical Device	PA Consulting	Combines AI, digital health, data, product engineering, connected devices, medical technology development and commercialization support.
26	Corporate, Portfolio and Growth Strategy	Kearney	Broad strategic and operating capabilities across biopharma, MedTech, providers, payers, innovation, commercialization and supply-chain transformation.
27	M&A, Commercial Due Diligence and Investor Advisory	L.E.K. Consulting	Deep biopharma, biotechnology, MedTech and pharma-services expertise covering commercial diligence, portfolio strategy, valuation and value creation.
28	Global Market Entry, Country Localization and New-Market Development	Alcimed	Specialist life sciences market exploration, innovation, geographic expansion, partner identification, launch planning and country-specific opportunity assessment.
29	End-to-End Managed Services and Global Implementation	Tata Consultancy Services	Extensive global delivery spanning advisory, AI, data modernization, clinical, regulatory, safety, laboratory, pharmacovigilance and platform implementation.

APPENDIX D

RESEARCH SOURCES AND ABOUT BLACK BOOK

Selected sources below support the regulatory context, market taxonomy and corporate normalization used in this report. Appendix B capability descriptions summarize the application scope represented by each vendor's category placement; Black Book rankings remain based on qualified buyer and user performance measurements rather than vendor marketing claims.

- [1]** U.S. Food and Drug Administration, Guiding Principles of Good AI Practice in Drug Development
- [2]** European Medicines Agency, Use of Artificial Intelligence in the Medicinal Product Lifecycle
- [3]** U.S. Food and Drug Administration, E6(R3) Good Clinical Practice
- [4]** Ai4, Healthcare: Life Sciences & Biotech Track
- [5]** U.S. Food and Drug Administration, Artificial Intelligence for Drug Development
- [6]** U.S. Food and Drug Administration, Computer Software Assurance for Production and Quality Management System Software
- [7]** Recursion, Completion of the Combination with Exscientia
- [8]** Tempus AI, Acquisition of Deep 6 AI
- [9]** Datavant, Completion of the Aetion Acquisition
- [10]** Siemens, Completion of the Dotmatics Acquisition
- [11]** Clariness and SubjectWell, Merger to Form a Global Patient Recruitment Platform

ABOUT BLACK BOOK RESEARCH

Black Book Research, a global healthcare IT research firm headquartered in Tampa, FL USA and London GB UK develops independent buyer and user intelligence for healthcare, pharmaceutical, biotechnology and life-sciences technology markets. Its scorecards compare technologies, platforms, software applications and services through role-qualified current-client feedback, defined performance indicators, product-level market boundaries and transparent award eligibility standards. Black Book Research does not permit vendors to purchase inclusion, rank position or favorable score interpretation. Published winners must meet the current category definition, respondent threshold, distinct-client threshold and performance requirements.

Contact: doug.brown@blackbookmarketresearch.com

ABOUT APPLIED ARTIFICIAL INTELLIGENCE LLC

Applied Artificial Intelligence LLC is a Chicago, Illinois-based financial and technology advisory firm founded by Vasyl Harasymiv. The company specializes in strategic, financial, operational, and technology advisory services for artificial intelligence engagements, projects, and enterprise initiatives, including interim and temporary leadership for organizations requiring experienced direction during periods of evaluation, implementation, transformation, or transition. Its work connects AI strategy and technical execution with financial discipline, governance, organizational priorities, risk management, and measurable business outcomes. Applied Artificial Intelligence LLC served as a research and advisory partner and contributing author to this report.

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INDEX

Page references use the report's printed page numbers.
Cross-references direct the reader to the preferred indexed term. Category entries identify the corresponding Black Book scorecard number.

#

18-KPI performance framework,	2, 4, 19-21, 99
28 market categories and 29 award scorecards,	2, 4, 6-7, 17-18, 99

A

ADMET (Absorption, distribution, metabolism, excretion and toxicity),	17, 31-32
Advanced process control,	7, 10, 24, 77-78
Advisory and consulting firms directory,	134-149
Agentic AI,	96, 148-149
Aggregate reporting,	18, 61
AI drug target discovery and pathway modeling (Category 1),	6, 17, 28-30, 99
AI-enabled self-service RWE analytics and cohort intelligence (Category 12),	6, 17, 42, 53-54, 99
AI financial business case,	148
AI governance,	4, 10, 24, 91-92, 96, 139, 148
AI governance, model validation, MLOps, cybersecurity and controlled deployment (Category 27),	7, 18, 86, 91-92, 99
AI/ML. <i>See Artificial intelligence (AI); machine learning (ML)</i>	
AI protein, antibody and biologics design (Category 3),	6, 17, 28, 33-34, 99
AI-ready clinical and translational data operating platforms (Category 17),	7, 18, 60, 65-66, 99
AI-ready data,	10, 60, 96
Algorithm,	4, 30, 148
Anomaly detection,	17, 49, 76
APAC. <i>See Asia-Pacific</i>	
APC. <i>See Advanced process control</i>	
API. <i>See Application programming interface</i>	
Application programming interface (API),	136
Artificial intelligence (AI)	
as an enabling capability in the benchmark,	4, 9-10, 23-24
governance, validation and controlled deployment,	24, 86, 91-92, 96
consulting, systems integration and managed services,	93-94, 134, 147-149
Asia-Pacific (APAC),	14, 137, 145
Audit-ready evidence,	20, 24
Auditability,	20, 62
Autonomous lab,	7, 18, 71-72
Award eligibility,	4, 15, 150
Award language controls,	99

B

Batch record,	18, 77
Batch release,	18, 20, 79
Batch review,	7, 18, 20, 79-80
Bioinformatics,	7, 13, 18, 36, 67-68, 94, 141, 148
Biological plausibility,	20
Biologics,	6, 10, 17, 33-34
Biomarker,	4, 6, 10, 17, 35-36, 42, 52, 69-70, 96
Biomarker, multi-omics and precision-research intelligence (Category 4),	6, 17, 28, 35-36, 99
Biosimulation,	6, 10, 17, 28, 40
Biotechnology (biotech),	1-2, 12, 14, 94, 96, 99, 134, 142, 150
Black Book Research methodology	
category architecture and comparison boundaries,	9-10, 16-18, 99
ranking and award eligibility,	2, 15, 26, 99
respondent base and qualification,	5, 11-15, 99
scoring framework, weights and rating anchors,	19-21, 99
Bounded AI assistance,	23
Buyer checklist,	97

C

CAIO. See Chief artificial intelligence officer	
CAPA (Corrective and preventive action),	7, 18, 20, 79-80
Case intake,	18, 61-62
Case narrative,	18, 20, 61, 99
Category boundary,	18, 99
Category winner,	15, 99
Causal biology,	17, 29
Causal methods,	20
CDMO (Contract development and manufacturing organization),	5, 12-13, 96, 134, 139
Chain of identity,	7, 18, 24, 83-84, 96
Change control,	18, 20, 23, 91-92, 96-97
Chief artificial intelligence officer (CAIO),	13
Client concentration,	15
Client-rated vendor performance	
category leaders summary,	6-7
category scorecards,	29-94
interpretation and award controls,	2, 15, 26, 99
Clinical data review,	6, 17, 42, 50
Clinical data review, RBQM and automated trial-quality intelligence (Category 10),	6, 17, 42, 49-50, 99
Clinical development,	2, 10, 13, 17, 41-42, 143, 145
Clinical-stage biotechnology,	12-14, 96
Clinical supply,	5, 7, 17, 83-84
Clinical supply, cold chain, serialization and chain-of-identity intelligence (Category 24B),	7, 18, 74, 83-84, 99
Clinical trial management system (CTMS),	17, 20, 47, 97
Clinical trial simulation,	6, 17, 39-40, 42, 44
Cloud modernization,	134, 138
CMO (Contract manufacturing organization),	9, 12-13
Co-leader,	99
Cohort,	6, 17-18, 36, 53-54, 65-66, 96
Cohort construction,	17, 23, 53
Cohort discovery,	17, 45, 56, 96
Cohort transparency,	20
Cold chain,	7, 12, 17, 24, 74, 84, 96
Commercial analytics,	7, 18, 89-90, 145, 149
Commercial analytics, CRM, launch and field-force intelligence (Category 26),	7, 18, 86, 89-90, 99
Commercial due diligence,	143, 149
Companion diagnostic,	7, 18, 69-70, 96
Comparability,	18, 75-76
Competitive intelligence	
dark-horse challengers,	26, 28-94
startup and scaleup watchlists,	26, 28-94
market participant directory,	100-133
Competitive-intelligence profile,	4
Compliant content,	18, 20, 87-88, 96
Computational biology,	13, 34, 141, 148
Computer software assurance,	150
Connected device,	4, 6, 17, 42, 52, 99, 149
Context of use,	10, 23, 40, 97
Controlled deployment,	7, 18, 91-92
Controlled terminology,	64
Corporate strategy,	142, 149
Critical performance floor,	15
CRM (Customer relationship management),	7, 10, 18, 89-90, 96-97, 146, 149
CRO (Contract research organization),	14, 48, 134, 139
Cross-source validation,	20, 66
CTMS. See Clinical trial management system	
Current exposure,	15
Customer-controlled data,	18, 65
Customer intelligence,	18, 89, 145
Cybersecurity,	7, 10, 20, 91-92, 138, 140

D

Data activation,	20
Data engineering,	18, 23-24, 93, 141, 147
Data fitness,	4
Data governance,	10, 139, 142
Data integrity,	15, 99
Data lineage,	23
Data network,	4, 17, 55
Data provenance,	97
Data quality,	20, 23, 42, 50, 66
Data rights,	20, 134
Data-source fitness,	20
DCT. <i>See Decentralized clinical trial</i>	
Decentralized clinical trial,	4, 6, 17, 42, 48
Defined comparison scope,	17-18
Demand forecasting,	7, 18, 81-82
Demand sensing,	18, 81
Descriptive market inclusion,	15
Design-make-test-learn,	17, 31-32
Design of experiments,	18, 75
Developability,	17, 20, 33-34
Deviation,	7, 18, 20, 79-80
Deviation triage,	18, 79
Digital biomarker,	4, 6, 17, 42, 52, 96
Digital biomarkers, connected devices and remote trial monitoring (Category 11),	6, 17, 42, 51-52, 99
Digital endpoint,	10, 17, 23, 51, 99
Digital health,	143, 145
Digital pathology,	7, 18, 69-70
Digital pathology, imaging AI and companion-diagnostic development (Category 19),	7, 18, 60, 69-70, 99
Digital twin,	6-7, 18, 30, 40, 77-78, 145
Digital twins, biosimulation and in silico development (Category 6),	6, 17, 28, 39-40, 99
Direct user,	5, 12, 15
Disease network,	17, 29
Distinct client organization,	15
DoE. <i>See</i> Design of experiments	
Drift,	24, 92
Drug target,	6, 17, 28, 30, 148

E

EBR. <i>See</i> Electronic batch record	
eClinical,	4, 6, 10, 42, 48, 96
eClinical and decentralized trial execution (Category 9),	6, 17, 42, 47-48, 99
eCOA (Electronic clinical outcome assessment),	17, 20, 47
Economic model,	17, 57
eConsent (Electronic informed consent),	17, 47-48
EDC (Electronic data capture),	17, 20, 47-48, 97
EEA. <i>See European Economic Area</i>	
EHR. <i>See Electronic health record</i>	
Electronic batch record,	18, 77
Electronic health record (EHR),	50, 56
Electronic laboratory notebook,	10, 18, 71-72, 97, 148
ELN. <i>See</i> Electronic laboratory notebook	
EMA. <i>See</i> European Medicines Agency	
Enrollment,	17, 20, 43, 46, 137, 140
Enrollment forecasting,	17, 43
Enterprise platform,	18, 135
Enterprise resource planning (ERP),	20, 97, 142, 146
Enterprise services,	2, 5, 18, 85, 93
ePRO (Electronic patient-reported outcome),	48
eQMS (Electronic quality management system),	80
ERP. <i>See Enterprise resource planning</i>	

eSource (Electronic source data),	17, 47
eTMF (Electronic trial master file),	17, 47
EU. See European Union	
European Economic Area (EEA),	14
European Medicines Agency (EMA),	10, 150
European Union (EU),	14, 146
Evidence dissemination,	18, 87
Evidence generation,	4, 17, 53-54, 143, 149
Evidence strategy,	6, 17, 57-58, 96
Evidence synthesis,	17, 37-38
Evidence threshold,	15
Executive scorecard,	03-Jul
Exit rights,	97
Experiment orchestration,	18, 71-72
Explainability,	9, 20, 60, 92, 147
External comparator,	17, 55-56
External control,	6, 17, 42, 56

F

Fast Healthcare Interoperability Resources (FHIR),	136
FDA. See U.S. Food and Drug Administration	
Feasibility,	6, 10, 17, 42, 44, 96
Featured dark horse,	6-7, 28, 42, 60, 74, 86
Federated analysis,	68
FHIR. See Fast Healthcare Interoperability Resources	
Field execution,	18, 89
Field-force intelligence,	7, 18, 89-90, 142
Formulation,	7, 18, 75-76
Fractional leadership,	148

G

GCP. See Good Clinical Practice	
GenAI. See Generative artificial intelligence	
Generative AI,	46, 92, 136, 148
Generative artificial intelligence (GenAI),	139, 148
Generative molecular design,	6, 17, 31-32
Generative small-molecule design and optimization (Category 2),	6, 17, 28, 31-32, 99
Genomics,	5, 7, 10, 29, 35, 60, 68, 96, 136, 148
Genomics, bioinformatics and precision-medicine workflow platforms (Category 18),	7, 18, 60, 67-68, 99
Good Clinical Practice,	10, 150
Guardrails,	92
GxP (Good practice requirements),	7, 18, 20, 77-78, 92, 96, 147-148
GxP smart manufacturing, MES, digital twins and advanced process control (Category 22),	7, 18, 74, 77-78, 99

H

HCO. See Healthcare organization	
HCP. See Healthcare professional	
Health-authority intelligence,	18, 63
Healthcare information technology (HIT),	32, 134
Healthcare IT,	136, 149-150
Healthcare organization (HCO),	140, 144
Healthcare professional (HCP),	88, 90, 135, 149
HEOR (Health economics and outcomes research),	4-5, 10, 12, 57-58, 141, 149
HEOR, market access, pricing and evidence strategy technology/services (Category 14),	6, 17, 42, 57-58, 99
HIT. See Healthcare information technology	
Human-in-the-loop,	10, 23-24, 50, 62, 92, 147
Human oversight,	10, 50, 92, 147
Hybrid clinical trial,	17, 47-48, 143

I

ICH. <i>See International Council for Harmonisation</i>	
Imaging AI,	7, 18, 69-70, 139
Immunogenicity,	17, 33
Implementation quality,	4, 20
In silico,	6, 17, 28, 40
Industry 4.0,	136, 149
Ingestion,	18, 65, 68
Inspection readiness,	18, 20, 79-80
Instrument integration,	18, 71-72
Integrity event,	15, 99
Intellectual property,	20, 28, 147, 149
Interactive response technology (IRT),	17-18, 47, 83
Interim leadership,	147-148
International Council for Harmonisation (ICH),	10
Interoperability,	4, 9, 18, 20, 52, 65-66, 96, 136, 143
Inventory optimization,	82
IP. <i>See Intellectual property</i>	
IRT. <i>See Interactive response technology</i>	
IRT / RTSM,	18, 83
IT/OT. <i>See IT/OT integration</i>	
IT/OT integration,	136

K

Knowledge graph,	17, 30, 37, 137, 139
Knowledge mining,	6, 10, 17, 28, 38
Knowledge transfer,	9, 20, 24, 96

L

Laboratory informatics,	7, 13, 18, 71-72, 144, 148
Laboratory informatics, scientific data and autonomous-lab enablement (Category 20),	7, 18, 60, 71-72, 99
Launch readiness,	18, 81, 96
Life-sciences AI consulting, systems integration and managed services (Category 28),	7, 18, 86, 93-94, 99
Life-sciences CRM,	18, 89
Like-with-like comparison,	15
LIMS (Laboratory information management system),	10, 18, 71-72, 97, 148
Literature surveillance,	18, 61

M

M&A. <i>See Mergers and acquisitions</i>	
Machine learning (ML),	13, 30, 34, 44, 143, 145
Managed delivery,	10, 18, 86, 93
Managed services,	4, 12, 24, 93-94, 96-97, 138, 149
Manufacturing execution system,	7, 9-10, 39, 77-78, 97, 136, 149
Market access,	4, 17, 23, 54, 58, 96, 143, 145
Market entry and localization,	146, 149
Market-specific KPI,	20-21
Medical affairs,	4, 7, 10, 86, 88, 96, 145, 147
Medical affairs, scientific engagement and omnichannel content intelligence (Category 25),	7, 18, 86-88, 99
Medical science liaison,	18, 87
Medicinal chemistry optimization,	17, 31
MedTech,	14, 149
Mergers and acquisitions (M&A),	137, 147
MES. <i>See Manufacturing execution system</i>	
Missing-data control,	99
ML. <i>See Machine learning</i>	
MLOps (Machine-learning operations),	7, 10, 18, 91-92

Model change control,	20, 96
Model inventory,	18, 23, 91-92
Model lineage,	23, 97
Model monitoring,	92, 147
Model risk classification,	18, 23, 91, 97
Model validation,	7, 18, 91-92
Molecular generation,	17, 31
MSAT (Manufacturing science and technology),	13
MSL. See Medical science liaison	
Multi-omics,	6, 17-18, 28, 36, 67
Multimodal data,	4, 20, 23, 36, 96

N

Natural language processing,	17, 20, 37, 53, 66
Network planning,	18, 81
Next-best action,	18, 88-89, 145, 149
NLP. See Natural language processing	
Normalization,	2, 99, 150
Novelty,	4, 20, 30

O

Observational analysis,	54
Omnichannel,	7, 18, 87-88, 145, 149
Operating model,	18, 32, 84, 93, 147, 149
Operational resilience,	20
Outcomes research,	13, 17, 57

P

Parent-company reputation,	2
Participant adherence,	17, 51-52, 96
Participant burden,	20, 42
PAT (Process analytical technology),	18, 20, 77
Pathway modeling,	6, 17, 28, 30
Patient-level traceability,	18, 74, 83, 96
Patient matching,	6, 17, 45-46, 99
Patient stratification,	17, 35
Payer evidence,	17, 57
Performance assessment,	10
Pharmacovigilance,	6, 10, 18, 60, 62, 147-148
Pharmacovigilance and safety-signal intelligence (Category 15),	6, 18, 60-62, 99
Phenotyping,	17, 20, 53
Portfolio strategy,	142, 149
Precision medicine,	7, 12-13, 67-68, 96
Predictive operations,	18, 77-78
Predictive quality, deviations, CAPA, batch review and validation intelligence (Category 23),	7, 18, 74, 79-80, 99
Pricing and reimbursement,	149
Privacy-preserving linkage,	17, 55
Process analytics,	18, 77
Process development,	7, 10, 24, 75-76
Process development, formulation, scale-up and technology transfer (Category 21),	7, 18, 74-76, 99
Process model,	20
Product family,	99
Product-level evidence,	2, 5
Product lifecycle,	145, 150
Product specificity,	15, 99
Program recovery,	147-148
Prospective validation,	28, 30
Protein engineering,	17, 33-34
Protocol design,	6, 17, 42, 44, 137, 140
Protocol design, feasibility and trial simulation (Category 7),	6, 17, 42-44, 99
Protocol optimization,	17, 43, 148
Published ranked vendor,	15
PV. See Pharmacovigilance and safety-signal intelligence	

Q

QbD. <i>See Quality by design</i>	
QMS. <i>See Quality management system</i>	
QSP. <i>See Quantitative systems pharmacology</i>	
Quality by design,	10
Quality management system,	80, 97, 144, 150
Quality signal,	17, 49, 62
Quantitative biomarker,	18, 69
Quantitative systems pharmacology,	17, 39
Query management,	17, 49

R

R&D informatics,	147-148
Randomization and trial supply management (RTSM),	18, 83-84
RBQM (Risk-based quality management),	6, 10, 17, 49-50
Regulatory-grade,	17, 51, 55
Regulatory information management,	6, 10, 13, 18, 63-64, 97, 99, 144, 148
Regulatory intelligence,	6, 18, 63-64, 148
Regulatory intelligence, RIM and submission-content automation (Category 16),	6, 18, 60, 63-64, 99
Regulatory publishing,	18, 63-64
Regulatory readiness,	4, 10
Repeat award,	15
Reproducibility,	17, 20, 42, 53, 68, 96
Request for information (RFI),	147
Request for proposal (RFP),	147
Research-ready data,	20, 96
Research sources and About Black Book,	150
Respondent qualification,	12, 15
Responsible AI,	92, 139, 148
Retention,	17, 44-45
Return on investment (ROI)	
KPI definition and weighting,	20-21
market and buyer priorities,	23-24, 96-97
RFI. <i>See Request for information</i>	
RFP. <i>See Request for proposal</i>	
RIM. <i>See Regulatory information management</i>	
Risk-based controls,	10
Risk-proportionate technology use,	10
ROI KPI. <i>See return on investment (ROI)</i>	
Root-cause analysis,	78
RTSM. <i>See Randomization and trial supply management</i>	
RWD networks, linkage, tokenization and external controls (Category 13),	6, 17, 42, 55-56, 99
RWD (Real-world data),	6, 10, 17, 42, 56, 143, 149
RWE (Real-world evidence),	4-5, 9-10, 42, 54, 96, 143, 149

S

Safety signal,	6, 18, 61-62
SaMD. <i>See Software as a medical device</i>	
Scalability,	9, 20
Scale-up,	7, 18, 75-76
Scenario optimization,	18, 81
Scenario testing,	17, 43
Scientific data cloud,	18, 71-72
Scientific literature, patent and knowledge mining (Category 5),	6, 17, 28, 37-38, 99
Scientific validity,	4, 20, 28
SCM. <i>See Supply chain management</i>	
Score band,	21
SDMS (Scientific data management system),	18, 71
Secure collaboration,	18, 67, 96
Semantic fidelity,	20
Semantic harmonization,	18, 23, 65-66
Semantic search,	17, 37
Serialization,	7, 12, 18, 83-84
Service accountability,	4, 97
Signal management,	18, 61-62
Site intelligence,	17, 45-46
Software as a medical device,	136, 149
Source traceability,	64

Specialist product,	18
Sponsor,	2, 12, 15, 18, 29-30, 42, 48, 62, 64, 96, 135, 142
Stakeholder engagement,	18, 87
Sub-index,	18, 97, 99
Submission-content automation,	6, 18, 63-64
Submission operations,	18, 63-64
Supplier visibility,	18, 81-82
Supply chain management (SCM),	81
Supply planning, demand forecasting, inventory and resilience (Category 24A),	7, 18, 74, 81-82, 99
Synthetic control,	17, 39
System of record,	72
Systems integration,	4, 10, 12, 24, 86, 93, 135, 144

T

Target identification,	17, 29
TechBio,	134, 144
Technology infrastructure,	2, 9
Technology transfer,	7, 18, 75-76
Temperature monitoring,	84
Therapeutic modality,	20, 30
Throughput,	20, 34, 82, 148
Time to value,	20, 96
Tokenization,	6, 17, 20, 55-56
Top 2026 Contender,	06-Jul
Transaction support,	134, 137
Translational research,	12-13, 23, 36, 38, 70, 94, 96
Trial-quality intelligence,	4, 6, 17, 42, 50
Trial site,	6, 17, 42, 46
Trial site selection, recruitment and patient matching (Category 8),	6, 17, 42, 45-46, 99

U

U.S. Food and Drug Administration (FDA),	10, 150
Universal KPI,	20-21
User adoption,	4
User-directed evidence generation,	17, 53
User experience,	2, 20

V

Validation,	4, 7, 18, 20, 28, 60, 65, 79-80, 91-92, 96, 147-148
Value communication,	20, 149
Value dossier,	17, 57
Variant interpretation,	18, 67-68
Vendor and market participant directory,	100-133
Vendor independence,	147
Vendor neutrality,	134
Verified respondent,	4, 12
Version control,	97
Virtual biotech,	134
Virtual population,	17, 39-40
Virtual screening,	17, 31

W

Wearable,	17, 51-52
Weighting,	99
Workflow acceptance,	20
Workflow integration,	20, 70