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2025 Highlights Powering the Path to 2026

AUDIO TRANSCRIPT

VO: This is the Lens: Life Sciences Reinvention in Focus, a podcast brought to you by Accenture. Your host is Tom Lehmann.

Tom Lehmann 00:16

Welcome to The Lens, your source for insights at the intersection of life sciences, technology and innovation. I'm your host, Tom Lehman, and today's episode is our special year in review. So something a little bit different than we've done in the past, to give us an end of the year summary, as well as a look into next year, and we're reflecting on the pivotal shifts, breakthroughs and lessons that shaped and reshaped our industry over the past year.

Today, we're joined by Petra Jantzer, who is a Global Lead for Accenture's life sciences industry. I've asked Petra to join to share her thoughts on what we saw in 2025 and help us look ahead to 2026. 2025 was certainly a year of continued change across multiple dimensions, from the continued evolution the lab of the future to the mainstreaming of generative AI and the rise of agentic AI. We also witnessed organizations reimagining how science, technology and human talent come together to reshape and reinvent functions and core processes.

Throughout this episode, we'll revisit the voices of industry leaders such as Matt Studney, Anvita Karara, Sanjay Patel, Petra Jantzer and David Hull, who joined us this year to share their perspectives on the following themes: the expanding role of AI as a true collaborator, the rise of personalization and healthcare engagement, the realities and challenges of digital transformation in the lab and beyond, the ongoing journey of upscaling paired with responsible innovation and finally, the emergence of a workforce ready for future opportunities. Join us as we look back in defining moments of 2025 drawing out the themes and insights that will set the stage for the year ahead.

Tom Lehmann 01:34

Let's kick things off with what might be the biggest story of the year, the transformative power of AI and generative technologies. This year, AI moved from being just another tool in the toolbox to a true game changer, reshaping research, marketing, operations and even the workforce itself.

Petra Jantzer 01:57

Absolutely, Tom, the change has absolutely been incredible. We've seen organizations experiment with AI in ways that go far beyond automation, using it for discovery, design and decision making, from predictive analytics to generative models, the possibilities seem endless.

Tom Lehmann 02:16

They really do. And as you're thinking about those possibilities, it will start as we look backwards here, revisiting what Matt Studney said back in January. Here's his perspective:

Matt S. 02:26

Over the last couple years, there has been a shift in focus to data science, machine learning, deep learning, artificial intelligence, and now everyone's talking about generative AI. And the way I look at that is where we've been, is we've really applied these capabilities in a meaningfully impactful way, specifically in the data science, machine learning, deep learning world, and this is across industries, whether it's autonomous driving or designing a molecule, lots of imaging capabilities that have been developed where we've impacted the overall capability of the industry to design better molecules, and you're starting to see that really have an impact in a measurable way, whether it's cycle time, probability of success, or user experience or capacity creation.

Petra Jantzer 03:19

That's a really powerful observation Tom, but for me, it also raises some big questions: which AI opportunities, present the proof of value requirements and then have the ability to scale? What separate pilots that graduate enterprise scale from those that stall it? Is technology limitations, data, fitness, process, design or the human elements, including change adoption.

Tom Lehmann 03:45

And I think as AI becomes more agentic, we also need to think carefully about the roles, whether those are advisory, assistive and autonomous, especially in the regulated spaces which we see across our industry. So where do we draw the line? How do we prove control and predictability, and then how do we design for the human side of all of this?

Petra Jantzer 04:02

Tom, I fully agree, the human in the loop cannot just be a catchphrase. It must be a design principle. Which decisions will always require human oversight, and what audit trails or sign offs make that verifiable to regulators? Really very important for our industry.

Tom Lehmann 04:20

Yeah, I think if I look at that, I think these are the questions that will shape how we move from experimentation to impact. We're in this space where a lot of experimentation is happening, but what's it really going to take to get to impact? I think organizations that get this balance right are going to lead the way. And now, if AI is changing how we work and innovate, it's also changing how we connect with patients healthcare providers and each other, and that brings us to our next theme, personalization and digital engagement in healthcare.

Tom Lehmann 04:43

All right, so let's move on to that theme, personalization and digital engagement in healthcare. I think we can all agree that personalization is no longer a nice to have. It's the expectation. It's becoming the new standard. Digital AI technologies are enabling tailored experiences in many parts of our lives, and we're in we're starting to take that as a as an expectation as you move towards healthcare, and so therefore that includes patients and healthcare providers, and we're now moving to even more meaningful interactions, and that shift is starting to change the game.

Petra Jantzer 05:48

Absolutely Tom and it's not about sending the right message, it's about creating an experience that feels relevant, timely and trustworthy. And when you think about healthcare, those qualities aren't optional, they're essential.

Tom Lehmann 05:31

So let's hear how Anvita Karara captured this in her July episode.

Anvita Karara 05:36

Content in its in its core, that's not the true driver, where content can be a true driver powered by Gen AI can be to link it to what our physicians, patients and providers want to see. Want to know, if they want to prescribe a product, what is the information they would need, and how can you deliver that information to them in the most appropriate manner, and personalize those customer journeys end to end will be the true test of time, and will be where I really think in the next few years, the companies who are able to tap this potential will have a very competitive advantage in engaging with their patients than the companies who do not go that route.

Petra Jantzer 06:26

Tom, I loved Anvita's perspective. As we move forwards in this space, it's the balance of understanding what the minimal compliant data stack is, including data consent, data origin and data outcomes required to personalize safely without over collecting. And as AI tooling becomes more common, how do you avoid same face interfaces and maintain an on brand personality and tone?

Tom Lehmann 06:52

And I think that's a great question right at the end of the day is again, as it becomes much more common, as you said, the ability to then really differentiate self becomes more challenging. And so I think as you start to move from this idea of clicks to care, what metrics are going to convincingly link personalized engagement to clinical, real world outcomes, how do you measure it? And then how do you attribute causality, rather than just correlation? In this space, I think these are some of the questions that are going to find the next wave of digital health engagement. And I think we're just getting started in a lot of new areas here.

Petra Jantzer 07:24

Yes, agree, and the leaders we spoke to this year are all clear, personalization is the path to better outcomes, deeper trust and lasting competitive advantage.

Tom Lehmann 07:32

So of course, none of this innovation happens without new products. The lab is where ideas come to reality, and this year, the lab of the future continue to move from vision to reality. And I think there's a lot of kind lot of conversation around what when is that future? Is that future becoming the present? What labs are there? What labs are not there? And so let's remind ourselves of Roy Helmey remarks and how the labs are evolving

Roy H. 07:54

So ultra fast DNA sequencing is another amazing discovery. If we went back two decades, one human genome would take us about 13 years, $2.7 billion and now we can sequence individuals entire DNA in just a day or two, and we're almost approaching hours and for hundreds of dollars, that's just the breakthroughs we're seeing in the lab.

Tom Lehmann 08:28

I have to say that's incredible progress. Wouldn't you agree?

Petra Jantzer 08:31

Yes, Tom I loved Roy's comments, but it also makes me wonder, where are we truly on the maturity curve? What constraints limit most end to end digitalization in labs today. Is it the data interoperability, validation burdens, change control, or probably funding? And if you could redesign one workflow from scratch which would deliver the biggest step change, what must would you bake in, maybe closed loop data capture, robotics, or AI driven quality control?

Tom Lehmann 09:03

I think those are great questions, and I think those are the ones that I think we have to try to work our way through. I'll add one more. How do we quantify value beyond the anecdotes? We're seeing, a lot of things that they say, 'Okay, this is working here, this is working there," but how do you actually quantify that value, and where are their leading indicators? First pass, yield, deviation, rate, tech transfer speed. Should those be on every lab leader's dashboard at this point?
I think because the lab of the future is here for some but not all. The challenge now is scaling these breakthroughs and making them universal across all lab types.

Petra Jantzer 09:33

So Tom if I had to reimagine the lab of the future, I say it's fully digital, seamlessly integrated and powered by automation and AI, but it's also human centric, designed for collaboration and adaptability. What do you think Tom what else belongs to that vision?

Tom Lehmann 09:51

I think the thing that's missing in there is people, right? If you think about as technology advances, we have to also prioritize the people or the talent. That's a part of of making all of this technology actually useful. And actually it's a good segue into our fourth theme, which is around change management, upscaling and responsible AI becoming more critical than ever. And I have to say they're not just buzzwords, right? These are foundational for sustained transformation, and I think organizations that are really getting this right seem to be the ones who have made great progress in this area. And it reminds me of the conversation we had with Sanjay Patel. So why don't we cut over to some comments from this August episode,.

Sanjay P 10:26

The technical or technology kind of collage to now, every employee in the company, no matter what where you are, what role you've got, what level you are, everyone will benefit from this in some form or fashion. It's so we have to kind of really embrace, and that's what I really like about Takeda is that it is a top down, different kind of program, where our senior leaders are leading by example, where they're also kind of embracing and using these digital tools in their daily life, and they're sharing across the enterprise how one of these digital solutions is actually helping them do some of their work.

Petra Jantzer 10:59

I really appreciate sanjay's call to action, and it makes me think. You know, we as leaders, what new skills do we want to learn in this new year? I can tell you, for me, it's two very, very practical things. One, I really want to learn building my own agents and LLMs, and the second skill I want to sharpen is complex prompting. What about you? Tom, what's on your list?

Tom Lehmann 11:26

Yeah, those are great picks. I would add those certainly to my list. I might ask another question in my day to day that I think is going to help me guide what happens next year, which is, how can my AI tools help me just in all aspects of my job? How do I start with an AI first mindset, and then when I do something and I make some progress or the opposite, right, with experience doesn't go as well as you'd like... How do I share those experiences my leadership teams? And I also want to take my agent usage and development to the next level. I

think I'm just starting to dabble in that space. I think there's a lot more that could be done there.

Tom Lehmann 11:55

And I think it does raise a question, broadly speaking, around in this space right now, what learning model most effectively will lift digital dexterity across a diverse set of personas in any organization? We represent leadership roles, but there's a whole bunch of different roles in an organization. So should organizations establish boot camps or guilds or different role based pathways learning agents? How do you bring learning into the flow of how work is done. So would you see all of those as options?

Petra Jantzer 12:24

Yeah, I think it's likely all of those, because organizations need to meet their people where they are, and blend group learning with learning in the workflow that is more on demand. The pace of change and the availability of content is reshaping learning and development.

Tom Lehmann 12:41

I think that pace of change also is also demanding new skills, and there's a mindset shift that has to happen as well as I think this is where responsible AI has to come into play. As we're using more and more of these tools, really being conscious of how they're being used and what the outcomes are, and recognizing when AI is an assistant versus something that can actually start to replace some work. I think that gets us into our final theme here, which is around collaboration, creativity and purpose, and how that's going to help define the workforce of tomorrow. Let's take a moment to reflect on what the future workforce will look like. David Hull, this year, captured this perfectly in his May episode. Here's what he said:

David H 13:22

I think the future workforce in the life science industry will need a completely new suite of capabilities, if you will, in order to thrive alongside Gen AI. And I think that's key alongside Gen AI. So there's a need for an agentic workforce, one that embraces autonomy, responsibility, strategic decision making, and these skills require people to, of course, build technical acumen.

Petra Jantzer 13:56

I love that phrase alongside Gen AI. It's not about replacing people. And you know, Tom in conversations with clients, there is a lot of concern about, are our jobs gone? For me, it is about empowering people. It means curiosity, adaptability and ethical judgment will matter as much as coding or data skills.

Tom Lehmann 14:20

I couldn't agree more. I think it's a blend, and that's going to be technical depth plus creativity and purpose, which I think is really important our industry. But it also raises big questions for organizations as you think to the future, as you were just saying, there's a lot of companies that are worried about this right now. So which roles will emerge and which ones are going to shrink?

Tom Lehmann 14:40

How do we manage that transition in a respectful and human way, while focusing on the strategic imperatives, because there is definitely a sense of urgency to move quickly in our industry. And beyond roles, what organizational structures and rituals will enable responsible and productive human plus AI collaborations. And I think that's important, right? It's human plus. It's not one or the other. I think it's those two working together

Petra Jantzer 14:57

Exactly Tom. And you know what? I think. Is another challenge. How do we attract non traditional talent into r, d and commercial teams? And, you know, Pharma has always been a little bit special with its talent, but now we need people from design, behavioral science, even people that have a gaming background, and then assess also the impact of that talent mobility. These are not HR questions. These are really strategic questions.

Tom Lehmann 15:27

I would agree. And I think as we reflect on this, I think the future will belong to organizations and individuals who find that blend between curiosity and creativity with both technical acumen and a shared sense of purpose. As we look ahead, collaboration and creativity and purpose, I do think will define the workforce of tomorrow. And I'd say it's clear that 2025, wasn't just a year of adaptation, it was a launching pad for what's next. The themes we explored, AI as a partner, the power of personalization, the importance of upscaling, drive for responsible innovation, are really only gaining momentum at this point, which feels like we're just getting started. And I do think that momentum sets the stage for 2026.

Tom Lehmann 16:03

So looking ahead, I anticipate these trends will accelerate. AI and agentic will move from augmentation to a foundation for reinvention, with humans and machines collaborating across R&D supply chain and operations and also in sales and marketing. I think we're going to see personalization become much more hyper targeted, which is going to allow

organizations to leverage real time data to deliver really tailored experiences and outcomes for each stakeholder they interact with, which I think is a pretty special place to get to.

Petra Jantzer 16:30

Yes, and I believe that the workforce will be defined by adaptability digital fluency and a commitment to ongoing lifelong learning as new roles and skills emerge. Responsible AI will also have to shift from aspiration to operational reality, where organizations embed ethical frameworks, transparency and inclusivity, very important, into every solution. And we should not forget, with all of this, the mission to improve patient lives will have to remain at the heart of every innovation in our industry.

Tom Lehmann 17:07

So Petra, given your role as the Global Life Sciences industry lead at Accenture, how are industry leaders looking at the year ahead? What should we keep an eye on in 2026?

Petra Jantzer 17:17

Tom, that's a great question. If I had to pick three, I'd first start with digital transformation and AI. AI, we've been discussing quite a bit. We are seeing AI move from hype to real productivity embedded in everything and everywhere along the value chain, from drug discovery to manufacturing. But the reality check: today, only about one in five companies have scaled AI successfully, and fewer still, are seeing big returns. The winners are those treating data and platforms more as core infrastructure and not as side projects.

Tom Lehmann 17:52

So it sounds like it's not just about investing in AI based solutions. It's really about trying to make it work at scale. So then what's this? What's the second big trend

Petra Jantzer 18:02

That's totally right Tom the second one is patent cliffs and pricing pressures. We see a lot of biosimilars and generics being approved, while our clients, major companies, are losing their market exclusivity on historically important products to their sustained growth at the same time, governments are pushing for even lower prices, given global rise in healthcare spending. And we should not forget, China is a big competitive force at the horizon as well.

Tom Lehmann 18:34

Which creates, I'd say, both an opportunity and a dilemma for the industry at this point. So how are you seeing companies respond?

Petra Jantzer 18:39

There is a set of actions that companies are taking. A very important one is diversifying portfolios, exploring new pricing models, for example, outcome based contracts and investing in real world evidence to justify value. It's the most important thing: demonstrate value. It also drives M&A partnerships, as firms raise to replenish pipelines and access new technologies. It's also prompting a real focus on reinvention and not incrementalism. We spend a lot of time on AI in this discussion, broadly speaking, I expect that the pressure to deliver tangible results quickly will be front and center next year. And this is not just about efficiency. It will be balanced with a focus on R&D productivity, supply chain, resilience and commercial effectiveness.

Tom Lehmann 19:32

So if you take those first two and say, Okay, there's one more big area of focus in 2026 that we should be keeping an eye out for, what would that be?

Petra Jantzer 19:40

Well, the third one is very close to my heart. I'm a scientist by education, so it's all about advanced modalities and therapeutic areas, cell and gene therapies. MRNA, ADCs, these are no longer just experimental. They're scaling up and tackling diseases we wouldn't be able to address before. And in the upcoming year, we'll see a lot more clinical development readouts and product launches in this space.

Petra Jantzer 20:09

As a therapeutic area, I would probably call out obesity and cardiometabolic are now rivaling oncology for pipeline investment and leadership focus. We'll see a lot more M&A in licensing activity, and both clinical successes and disappointments in this space that has the potential to dramatically improve global health. Companies investing in this competitive space need to both accelerate but also differentiate, and that will be a big focus, not only of the next but of the coming years.

Tom Lehmann 20:41

And it sounds like we're at another moment in the history of the industry. And looking back, the industry is has navigated through a variety of different moments like this, and it feels like we're at another one where there's this opportunity to balance what could be very bold innovation

as well as technology advancements, where there's the reality of some economic challenges that are out there.

Petra Jantzer 21:05

Exactly Tom You got it success in 2026 means being agile, harnessing digital and AI tools, navigating pricing reforms and scaling breakthrough science. The companies that adapt the fastest will set the pace for the next decade as a restacking of industry leaders is very, very likely to happen.

Tom Lehmann 21:24

Well, I think that's a good place for us to close. So Petra, thank you for joining us with this 2025 recap and a little bit of look into the future as we turn into 2026
and I'd say here's another year of
progress, partnership and purpose in the life sciences industry. Thanks for joining.

Petra Jantzer 21:43

Thanks for having me.