IDC MarketScape

IDC MarketScape: Worldwide Life Sciences R&D Lab of the Future Technology Solutions and Consulting Services 2026 Vendor Assessment

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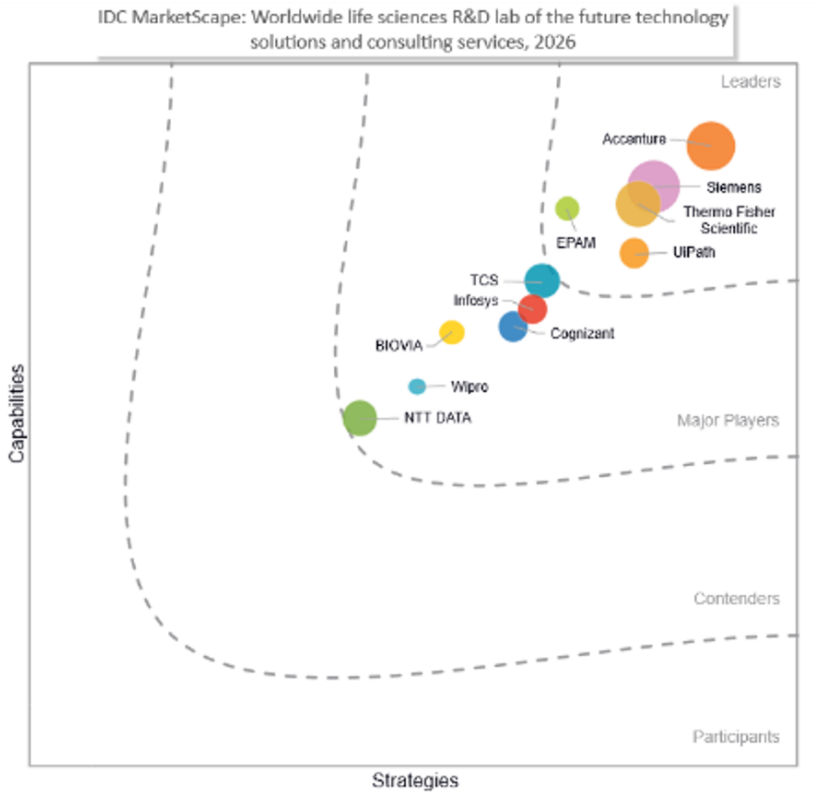
THIS EXCERPT FEATURES ACCENTURE AS A LEADER IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape: Worldwide life sciences R&D lab of the future technology solutions and consulting services vendor assessment



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

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Life Sciences R&D Lab of the Future Technology Solutions and Consulting Services 2026 Vendor Assessment (Doc # US54122126).

IDC OPINION

The term *lab of the future (LotF)* is gaining considerable significance. It is a collective name for the technologies and strategies that will serve to enable the next generation of researchers (refer to the Market Definition section of this document for a detailed definition). The adoption of the LotF is scaling as a result of a variety of challenges that the life sciences industry is facing.

Key challenges in implementing a lab of the future strategy

- **Workforce resistance and change management.** Scientists and lab teams are often reluctant to move away from familiar manual workflows, paper notebooks, and legacy systems, and they can be skeptical that new technology will hold up to scientific judgment. This resistance is compounded when GenAI and agentic tools introduce new ways of working that lab personnel have not yet been trained on.
- **Fragmented, legacy technology landscapes.** Heterogeneous instruments, laboratory information management system (LIMS)/electronic lab notebooks (ELNs)/chromatography data system (CDS)/enterprise resource planning (ERP) systems, and proprietary data formats across departments make integration slow, costly, and hard to scale, often creating data silos and inconsistent workflows that complicate the introduction of automation and AI.
- **Scarcity of hybrid digital-plus-scientific talent.** There is a limited pool of professionals who combine deep domain science expertise with digital, automation, and AI skills.
- **Difficulty demonstrating ROI and securing budget.** The benefits of lab modernization (faster insights, fewer errors, improved compliance) are often indirect and realized over time, making them hard to quantify against more immediate manufacturing or R&D budget priorities. This frequently leads to smaller, pilot-scoped engagements rather than enterprise-wide transformation.
- **Regulatory, compliance, and validation complexity — intensified by AI.** Any new technology introduced into a GxP laboratory requires rigorous validation, and this burden grows with AI-based tools, where transparency, traceability, and auditability of system outputs become critical to maintaining inspection readiness.

- **Keeping pace with rapid technology change and competitive consolidation.** The LotF technology landscape is evolving quickly — GenAI and agentic AI capabilities, physical AI, computer vision, platform consolidation through M&A, and an expanding partner ecosystem make it an increasingly complex landscape to navigate.
- **Cybersecurity and data protection risk during modernization.** As labs move to more connected, cloud-enabled environments, staying ahead of evolving intrusion techniques and implementing robust security measures becomes a growing operational requirement, putting increasing pressure on pharma and on vendors.

How LotF technology providers are addressing these challenges

LotF technology providers are gearing up to address these challenges. Key initiatives include:

- **Agentic AI adoption as competitive parity.** Agentic AI systems that plan, execute, and iterate autonomously have moved from differentiators to table stakes.
- **Change management as the number 1 barrier.** Shifting from manual workflows to digital platforms remains the biggest adoption hurdle. Scientists resist due to workflow disruption and skepticism. Vendors cite this as the primary growth challenge. Success belongs to those prioritizing organizational readiness over pure technology.
- **Cloud-native LIMS and ELN dominance.** SaaS platforms now win more RFPs than on-premises incumbents. Cloud-native architecture is not optional.
- **Outcome-based pricing as market standard.** Pay-for-performance models tied to KPIs (time to insight, error rates, productivity) are no longer emerging — they are expected. Legacy-pricing incumbents will lose enterprise deals.
- **Lab-as-a-service pricing model.** Recurring subscriptions bundling infrastructure, platform, data orchestration, and AI/ML into unified tiers are winning. This addresses ROI justification by offering predictable OpEx costs aligned with measurable outcomes.
- **Consumption-based licensing.** Pay-per-data-volume, pay-per-instrument, pay-per-user models lower entry barriers for midsize labs while creating scalable vendor revenue streams as operations grow.
- **Physical automation at an inflection point.** Robotics and lights-out labs are emerging as a new modus operandi. With the global lab automation market growing rapidly, hybrid environments where humans, robots, and AI collaborate are becoming the new reality.
- **Vendor consolidation accelerates.** LIMS, ELNs, instruments, and platforms remain fragmented. Acquisition waves consolidate end-to-end solutions to simplify fragmented ecosystems.

- **Prepackaged accelerators.** Productized offerings, such as data parsers, integration platform as a service (iPaaS) that connect legacy instruments, ELNs, and LIMS into a unified cloud framework, are replacing custom implementations. These enable faster sales, predictable delivery, and reduced customer risk, addressing prolonged sales cycles.
- **Data orchestration as a competitive moat.** The lab transitions from point solutions to a human-AI collaboration node within the enterprise ecosystem. Winners orchestrate data across discovery, development, manufacturing, and quality in real time as the digital thread weaves its way across the value chain and back. IDC has predicted that by the end of 2028, midsize and large pharma will increase adoption of AI agents by 100%, scaling the "lab in the loop" and the "manufacturing to design-of-experiment loop" to attain market leadership (see *IDC FutureScape: Worldwide Life Sciences 2026 Predictions,* IDC #US53855625, October 2025), and one sees the shift beginning to happen in the industry right now.

The evolving LotF ecosystem

The LoTF ecosystem is rapidly expanding and has come to include not only technology providers, implementation partners, and consulting companies but also newer players to this space, such as model providers and compute and infrastructure providers. A few examples are listed:

- **NVIDIA:** As AI takes on more of the design and prediction work, GPU compute becomes the rate-limiting resource for how fast biotech can iterate. NVIDIA is becoming the indispensable infrastructure that is powering the "lab in the loop." Its GPU engine runs flagship models such as Nemotron for reasoning, BioNeMo for biology, and Cosmos for physical worlds. Open-source models like ESM2 and DiffDock are provided on the NVIDIA BioNeMo platform. Its BioNeMo Agent Toolkit repackages these models into skills, bridging the gap between natural language and raw biological computation. Omniverse provides the simulation and digital-twin infrastructure, while Cosmos physical AI models enable embodied intelligence across robotics and autonomous systems, and Metropolis delivers computer vision models for intelligent video analytics. NVIDIA provides developers with open source tools to close the loop in the lab of the future — from agentic AI that enables biological prediction and scientific orchestration to physical AI that accelerates experimental execution through robotics, automation, and digital twins. From big pharma to innovative start-ups, NVIDIA has established a powerful ecosystem of partnerships to power the "lab in the loop."
- **AWS:** In 2026, AWS launched Amazon Bio Discovery, which powers "lab in the loop" AI-fueled or antibody design and for drug discovery. Scientists can access a broad catalogue of benchmarked AI biological foundation models (such as Boltzm ESM2, and RFDiffusion), an AI agent for experimental design (bioFMs like Boltz and

Apheris), configuration tools, and wet-lab integrations (such as Twist Bioscience and Ginkgo Bioworks). This optimizes antibody candidates while selecting, prioritizing, and unifying computational and lab data and learnings across the value chain. Early partners and customers leveraging Bio Discovery include Memorial Sloak Kettering Cancer Center, Genentech, Bayer, Noetik, Manas AI, QuantHealth the Broad Institute, and Fred Hutch Cancer Center.

Amazon Bedrock AgentCore is a model- and framework-agnostic platform used to build, secure, and run production AI agents across enterprise use cases. Sanofi partnered with AWS to build its Scientific Workflow Experience Labs (SWEL) platform — a context-aware operating system for AI-driven drug discovery. Built on Amazon Bedrock, Bedrock AgentCore, HealthOmics, and EKS, SWEL provides shared memory and context across the drug discovery life cycle, spanning over 50 scientific workflows, and solving the "context gap" that limits most AI implementations today. Sanofi has already identified biologically active compounds and is targeting 50% reduction in molecules requiring wet lab validation and 10x speed increase in deploying AI workflows.

- **Microsoft:** Microsoft Discovery is an extensible platform that brings together agentic orchestration, advanced reasoning, a graph-based knowledge foundation, and high-performance computing. Microsoft is collaborating with Ginkgo Bioworks to enable researchers to plan experiments in Microsoft Discovery and run them directly on Ginkgo Cloud Lab, without requiring in-house automation. While Microsoft Discovery provides the reasoning, orchestration, and compute layer for scientific work, Ginkgo Bioworks contributes autonomous laboratory infrastructure, enabling the lab-in-the-loop model.
- **Anthropic:** Anthropic has launched Claude for Healthcare and Claude for Life Sciences. These releases deliver HIPAA-ready infrastructure, advanced scientific platform connectors, and specialized tools designed for clinical trials, administrative workflows, and biomedical research. In addition, Anthropic recently acquired Coefficient Bio to bolster biological research and drug discovery capabilities.
- **OpenAI:** OpenAI launched GPT-Rosalind, a specialized frontier reasoning model built specifically for life sciences, drug discovery, and translational medicine.
- **Google DeepMind:** Along with Isomorphic Labs, it launched AlphaFold 3 to predict the structure of proteins, DNA, RNA, and ligands. It also launched AlphaGenome, an AI model that can predict the impact of DNA mutations on gene regulation. It also offers Gemini for Science (experimental tools on Google Labs), including Co-Scientist for hypothesis generation, Computational Discovery, an agentic research engine, and Google NotebookLM for analyzing scientific literature.

These examples go on to illustrate the increased focus of a diverse set of players on powering the "lab in the loop" to accelerate drug discovery and make it abundantly clear that

this is going to be an ecosystem play and success will be shaped by the right strategic partnerships.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

IDC frequently has unique insights into vendor selection processes within life sciences companies through clients and contacts in the industry. For a vendor to be considered for inclusion in this study, its services must have been significantly evaluated for the potential to engage clients within the target IDC MarketScape space. The key inclusion criteria included:

- Vendors should have had at least five customers for your lab of the future offering for at least 12 months as of January 1, 2026.
- Vendors should provide both technology solutions and consulting services for their lab of the future offering.
- Vendors should have a minimum revenue of $300 million.

Further research and due diligence was then conducted to narrow the list of vendors to only those that IDC views as legitimate contenders for future deals within the life sciences R&D lab of the future technology solutions and consulting services space.

ADVICE FOR TECHNOLOGY BUYERS

An established LotF strategy differentiates organizations, accelerating innovation and driving operational efficiencies. However, the market has evolved dramatically. The number 1 barrier to LotF success comprises cloud-native platforms, agentic AI, and change management, followed by ROI justification challenges and ecosystem fragmentation.

In addition:

- **Cloud-native first.** On-premises LIMS are now at a competitive disadvantage. Mandate SaaS platforms with API-first architecture and built-in agentic AI capabilities. Avoid perpetual licenses.
- **Embed change management from day 1.** Pair technology rollouts with structured change management. Assign a dedicated change lead before vendor selection. Involve scientists in workflow design, deliver visible wins within 90 days, and invest heavily in competency building. Scientists must feel that AI augments, not replaces, their judgment.
- **Shift to outcome-based contracts.** Move away from fixed-price and T&M engagements. Define clear KPIs (cycle-time reduction, error rates, productivity gains) and ensure vendors share downside risk if targets are missed. This aligns vendor incentives with your success.

- **Build a phased road map with visible wins.** A phased road map could, for example, be phase 1 to showcase quick wins (ELN, instrument connectivity, automated reports), phase 2 for data governance and scientist upskilling, and in phase 3 show agentic AI and advanced analytics. Use productized accelerators to reduce risk and accelerate time to value. This will make it easier to justify investment even when benefits accrue over time.
- **Invest in open standards, modular and configurable platforms, and standardized connectors.** This will help reduce the integration burden created by fragmented legacy environments.
- **Build deeper academic partnerships.** This will help close the hybrid digital-and-scientific talent gap.
- **Embed compliance and validation requirements into solution design from the outset. Pay explicit attention to AI transparency, traceability, and auditability.** This can shorten the regulatory path for new tools rather than treating it as a late-stage hurdle.
- **Invest** in an ecosystem of strategic partnerships. This includes hyperscalers and niche lab technology providers, model providers, implantation partners, and IT consulting partners.
- **Select one strategic orchestration partner.** The lab ecosystem is fragmented (LIMS, ELNs, instruments, cloud platforms). Choose a single vendor that can integrate seamlessly across your stack, not multiple point solutions. Demand API-first modularity and data portability.
- **Establish a cybersecurity posture to keep pace with the accelerating rate of innovation in this space without introducing new operational risk.**

The 2026 lab of the future separates leaders from laggards. Buyers that prioritize vendors that provide cloud-native, modular architecture that scales and integrates, that provide masterful change management with the scientist's voice embedded in solutions, and that offer outcome-based contracts with shared risk will navigate the vendor landscape with confidence and realize tangible ROI faster.

VENDOR SUMMARY PROFILE

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

Accenture

After a close evaluation of Accenture's offerings and capabilities, IDC has positioned the company in the **Leaders** category in the 2026 IDC MarketScape for worldwide life sciences R&D LotF technology solutions and consulting services.

Headquartered in Dublin, Ireland, Accenture has offered LotF solutions for over three decades, expanding its lab informatics services with its 2017 acquisition of LabAnswer. It employs almost 800,000 people, including 30,000 life sciences professionals and over 600 dedicated lab transformation/reinvention experts, averaging over 10 years of experience. Over the past five years, Accenture has supported roughly 100 companies on LotF engagements, spanning 35+ pharma, 40+ biotech, and 8 prominent CROs, with most LotF revenue coming from customers with revenue over $1 billion. It extends its LotF services to consumer goods, chemicals, natural resources, energy, and government.

Strategic initiatives

Accenture frames its current growth phase as an evolution from Digital Lab modernization into Laboratory Reinvention, anchored to a goal of doubling the impact and productivity of laboratory scientists, then doubling it again. Its 2026 priorities integrate digital, physical (robotics), and intelligent (agentic AI) capabilities into a single operating model, prioritizing AI-ready data estates and platforms (with AWS, Microsoft, NVIDIA, and Databricks) alongside scientist readiness and reskilling as automation absorbs more routine wet-lab execution. Accenture describes a lab maturity progression from Digital Core toward Autonomous Labs, and continues to expand its Laboratory Advanced Learning Environments (ALE Labs), part of the network of its global innovation and reinvention engine, spanning Dublin, Orlando, and Kuala Lumpur alongside a growing suite of agentic accelerators built on its AI Refinery platform (R&D Lab Assistant, Intelligent Scheduling, Cloud Data Factories, QC Lab Assistant, Review by Exception).

M&As/partnerships

Accenture's digital lab partner ecosystem spans hyperscale cloud/AI platforms, informatics vendors, and a venture/acquisition portfolio. Key relationships include NVIDIA, Microsoft, Anthropic, AWS, and OpenAI for agentic AI infrastructure and research and SAP, Google, ServiceNow, Veeva, Snowflake, Databricks, Appian, Dassault Systèmes/BIOVIA, and Siemens/Dotmatics for connected enterprise, quality, and digital-thread capabilities.

Ecosystem partners include LabVoice, Scitara, TetraScience, LabVantage, Benchling, IDBS, BiosSSero, and Keenon Robotics. Recent acquisitions include Udacity (2024) and Faculty (2026), building on earlier deals such as Bionest and Knowledgent.

Pricing models

Accenture applies a range of pricing models, most commonly hybrid constructs combining fixed-price, milestone-based, SLA-driven, and performance-linked elements, alongside as-a-service/subscription arrangements, risk/reward and outcome-based structures, and standard time-and-materials pricing. It reports growing client interest in outcome- and performance-linked models and co-investment structures for large AI/automation programs.

Strengths

Accenture's differentiators include end-to-end laboratory reinvention capabilities — strategy and consulting, scientific informatics, automation and robotics engineering, data engineering, and agentic AI — delivered by 600+ dedicated Laboratory Reinvention experts. Its asset-led approach speeds time to value through proprietary platforms including AI Refinery, GenWizard, and Harmoni, and its ALE Labs, which serve as innovation hubs and training centers.

A few of its accelerators/solutions include:

- An Agentic Lab Assistant suite built on AI Refinery, including an R&D Lab Assistant, Intelligent Scheduling, Cloud Data Factories, a QC Lab Assistant, and Review by Exception capabilities
- Intelligent Digital Brain's Lab Scheduling Agent, which captures tacit scheduling knowledge by learning from lab managers' override decisions and rationale — encoding the institutional expertise when experienced staff retire or move on, and embedding it into future automated schedule generation
- Harmoni, a data and workflow orchestration solution enabling natural language search across ELNs, LIMS, and instrument data
- InSilicoBio/Research as a Service, Accenture's modular *in silico* discovery platform, which integrates ultralarge multimodal data sets with ML- and LLM-driven reasoning to uncover targets, generate hypotheses, and accelerate early stage science
- Digital twins for laboratory and manufacturing environments, including a high-fidelity greenfield facility twin developed with NVIDIA and Siemens
- A value-based methodology developed with Wharton, reporting average outcomes of 40–50% resource-effort reduction and about 30% lower lab deployment cost
- Other interesting initiatives include the use of AI and data integration strategies to power Antibody-Drug Conjugate (ADC) research and developing a Data-Driven Regulatory/CMC Biographer to automate content authoring, thus reducing regulatory

cycle times. One of Accenture's complex implementations involved co-designing a bioanalytical facility with over 900 pieces of equipment across six automated work cells, reporting client throughput of roughly 28,000 tests per month (versus a 3,000-test CRO baseline), a cost of about $200 per sample (versus $600), and a cycle time of two weeks (versus four).

The most common "lab of the future" ask from Accenture's customers is helping modernize fragmented lab IT estates into interoperable, AI-ready platforms spanning R&D, quality, and manufacturing. Top use cases include application modernization, AI-ready data foundations, talent and workforce transformation, and CMC/analytical development transformation.

Accenture's most complex engagements include a large-scale, robotics-enabled bioanalytical lab transformation for a global life sciences organization and a multiyear rescue of a stalled, 20-plus-site LIMS "lift and shift" for a global biopharma — reset via a four-week rapid diagnostic, new governance frameworks, and a manufacturing-continuity-anchored deployment strategy. It combined operating model redesign, standardization across highly variable labs, automation readiness, enterprise governance, and deeply coordinated change management across thousands of stakeholders.

"I would say that they are among the elite in defining what the lab of the future is. They have been fantastic. I was not a proponent of bringing in a high-cost consulting company on this project — but they have just exceeded my expectations. The power of Accenture is not in the slides, but in the molding of the vision and strategy — they set the stage behind the scenes with key executives at our other technology vendors, and they were the only firm in our evaluation that could both consult on the vision and actually integrate the pieces, Their strength lies in holding a project to its vision, they serve as the glue within the ecosystem," said an executive director at a global biopharmaceutical company.

"We had every possible digital tool available. One workflow even required the scientist to touch 20 different systems. Researchers wanted simplification. To be a good CIO, your service desk is the most important tool in your arsenal. Ours was really bad. Accenture identified real pain points. It pivoted from the lab of the future to the lab of the present; assisted with the tech build. Accenture's work was a foundational document toward our critical intervention strategy. They do have good domain expertise and chemistry, and they really do embrace the partnership model. What Accenture gave is a body of work that was valuable. The partnership from the leads of the program has been absolutely outstanding. Accenture is expensive, but it does have good quality people," said a vice president at a global pharmaceutical company.

Challenges

Accenture should focus more efforts on staff retention, address gaps in niche scientific areas, such as protein sciences, and address potential concerns related to integration

complexity as it continues to scale its partner ecosystem. Premium pricing continues to be a key concern.

Consider Accenture when

Consider Accenture when seeking a partner that powers the vision of “digital labs” to “living intelligence” by combining large-scale laboratory reinvention expertise with its deep bench strength in agentic AI, robotics, and data engineering; an extensive technology ecosystem; and global innovation hubs supporting both technology demonstration and workforce transformation. Accenture is well suited to drive large, complex, multisite transformation and rescue programs and to pair technology implementation with organizational change management.

APPENDIX

Reading an IDC MarketScape graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor’s current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

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

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

IDC MarketScape methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors,

publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market definition

For the purposes of this study, the term *lab of the future* is a collective name for the technologies and strategies that will feature and enable the next generation of researchers. These would include things such as a comprehensive data strategy, advanced analytics, automation, robotics, the Internet of Lab Things (IoLT), integration platform-as-a-service (iPaaS), lab-on-a-chip (LoC) technologies, intelligent laboratory instrument management system (iLIMS), laboratory information management system (LIMS), electronic lab notebooks (ELNs), smart instruments, cloud solutions, the use of AI/ML, generative AI, AR/VR, voice recognition technologies, sustainability strategies, and more.

This IDC MarketScape evaluates life sciences R&D LotF technology solutions and consulting services capabilities.

Market analysis

Success in 2026 requires organizations to shift from a tactical, project-based approach to a strategic, business-outcomes-focused transformation. Life sciences companies and their vendors need to build a common playbook for the industry:

- **From pilots to enterprise vision.** This involves moving beyond isolated experiments to organization-wide, architected road maps with clear governance, metrics, and accountability. Design frameworks and phased implementation plans guide labs toward their future state while managing legacy system transitions.
- **From cost and productivity to innovation and speed to market.** Metrics evolving beyond hours saved and cost reductions. Leadership now focuses on accelerated innovation cycles, speed to market, successful technology transfer, product quality improvements, and collaborative partnerships with external partners.
- **From technology centric to scientist centric.** The scientist must be embedded in the transformation journey from day 1. Workflow orchestration must drive efficiencies without disrupting established processes — a delicate balance requiring deep change management and organizational alignment.
- **From point solutions to ecosystem orchestration.** Successful vendors are architecting strategic partnerships and integrated platforms that span the entire value chain. Overarching data governance, shared ontologies, and API-first architectures are table stakes, not differentiators.
- **From CapEx to OpEx, from fixed to outcome based.** Pricing models are shifting from perpetual licenses and time-and-material engagements to cloud-native subscriptions, Lab-as-a-Service bundles, and outcome-based contracts where

vendors share in results. This realignment lowers adoption friction and aligns vendor incentives with customer success.

LEARN MORE

Related research

- *IDC Survey: Early Adopters of Functional Agentic AI in Life Sciences, 2026* (IDC #US54793126, August 2026)
- *IDC Survey: Strategic Priorities, Business Impact, and Investment Strategies for GenAI and Agentic AI in the Life Sciences Industry, 2026* (IDC #US54797926, August 2026)
- *IDC Survey: Governance, Technology, and Implementation Readiness for the Adoption of AI Agents and GenAI in the Life Sciences Industry, 2026* (IDC #US54798026, August 2026)
- *NVIDIA GTC 2026: The Tokenization of Life Sciences and Healthcare* (IDC #US54456026, April 2026)
- *IDC FutureScape: Worldwide Life Sciences 2026 Predictions* (IDC #US53855625, October 2025)
- *IDC MarketScape: Worldwide Life Sciences R&D Lab of the Future Technology Solutions and Consulting Services 2024 Vendor Assessment* (IDC #US51925324, March 2024)

SYNOPSIS

This IDC study has a specific focus on LotF solutions and consulting services in the life sciences R&D space. This document seeks to compare major service providers with each other based on criteria that should be important to life sciences companies when considering the selection of a technology solutions and consulting services partner to help implement a LotF strategy, transformation, and modernizing labs, across the value chain, from design of experiment (DoE) to manufacturing, and back. This is the second time that an IDC MarketScape assessment on this topic in life sciences has been performed.

"The '*lab of the future*' is no longer a pipe dream — it's an enterprise-level imperative grounded in clear strategic vision, phased execution, and measurable governance. Organizations that move beyond pilots to architecting scalable, end-to-end LotF road maps, building a cloud-native API-first platform, scaling deep scientist engagement, and driving business outcomes aligned with C-suite priorities will build sustainable competitive advantage. These organizations will be the ones leading the market in 2026," said Dr. Nimita Limaye, research VP, Life Sciences R&D Strategy and Technology at IDC.

ABOUT IDC

International Data Corporation (IDC) is the premier global market intelligence, data, and events provider for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries. IDC's analysis and insight help IT professionals, business executives, and the investment community make fact-based technology decisions and achieve their key business objectives.

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