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 Everest Group®

Top 50™

Pharmaceutical Technology
Providers 2026

 Everest Group®
PHARMACEUTICAL
TECHNOLOGY PROVIDERS | **TOP 50™**

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WHAT

is the Everest Group Top 50™ Pharmaceutical Technology Providers research?

The Everest Group Top 50™ Pharmaceutical Technology Providers 2026 research is a global ranking of the leading technology providers specializing across the pharmaceutical value chain. The list is based on multiple objective parameters, including:

Market adoption and scale: providers' revenues generated specifically from their pharmaceutical business, their active pharmaceutical customer base, and value chain coverage

Innovation, investment, and partners: providers' innovation capabilities, focusing on AI integration, cloud capabilities, and strategic partnerships

Client and geographic coverage: the providers' clients' geographic presence across North America, LATAM, UK, Continental Europe, APAC, Middle East and Africa, and client mix by buyer size

Value realization and outcomes: providers' impact, evaluated through an analysis of case studies highlighting the value created for pharmaceutical clients and coverage across the pharmaceutical value chain

Note to enterprises: This list is intended to serve as a starting point to build your own list of potential technology suppliers in specific value chain areas. It is important to note that the ranking is not an assessment of these firms' capabilities, but rather an ordered list based on revenue, off-the-shelf coverage, and recent investments to bolster their coverage; we have provided information on how the list is constructed on the next page. For a more comprehensive understanding of the providers' capabilities and a holistic analysis, please reach out to our analyst team and refer to specific [Everest Group PEAK Matrix assessment reports](#).

WHY

the Everest Group Top 50™ Pharmaceutical Technology Providers research?

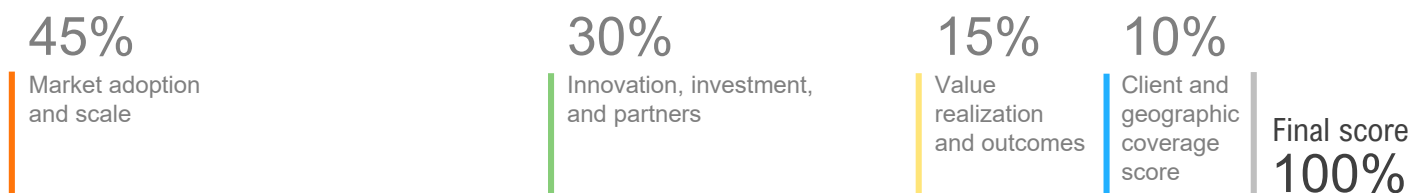
This report provides an objective and detailed analysis of the pharmaceutical technology landscape, helping enterprises identify the top platforms and assess their functional capabilities. It serves as a valuable benchmarking tool for technology providers and offers insights for enterprises looking to explore new solutions. The report also highlights notable trends such as agentic AI, hyperscaler partnerships, and cloud-native capabilities driving operational efficiency. This list is not a comparative capability analysis but a factual representation of these providers' business performance, geographical reach, and innovation focus.

HOW

is the Everest Group Top 50™ Pharmaceutical Technology Providers list determined?

We started the analysis with a comprehensive list of pharmaceutical technology providers and narrowed it down based on preliminary assessments.

- **Qualification criteria:** companies with dedicated technology platforms/solutions to serve pharmaceutical value chain segments
- **Rank determination:** we ranked technology providers based on a weighted composite score across four parameters: market adoption and scale; innovation, investment, and partners; value realization and outcomes; and client and geographic coverage. The respective weights across the four parameters are presented below



KEY

information sources for this report

We used multiple information sources for our analysis:

- **Proprietary data:** information sourced directly from technology providers, coupled with Everest Group's proprietary analysis and database of life sciences technology providers
- **Publicly available data:** reported revenue and coverage based on public sources, such as listed firms' annual filings and/or providers' press releases; in cases where providers did not disclose information publicly, we relied on publicly available data from external sources

Scope of the research

The scope of the Top 50 Pharmaceutical Technology Providers research spans the following value chain segments.

Value chain scope

Drug discovery and research	Clinical development	Manufacturing operations
Sales and marketing	Supply chain and distribution	Pharmacovigilance and safety

Geography scope

North America	Continental Europe	United Kingdom
Asia Pacific	Latin America	Middle East and Africa

Everest Group Top 50™ Pharmaceutical Technology Providers 2026 (page 1 of 2)

Rank	Technology provider	HQ	Market adoption and scale score	Innovation, investment, and partners score	Value realization and outcomes score	Client and geographic coverage score	Final score
1	IQVIA	US	45.0	30.0	13.5	8.3	96.8
2	Veeva Systems	US	41.7	25.0	14.8	10.0	91.4
3	SAP	Germany	38.3	30.0	11.6	10.0	89.9
4	Dassault Systèmes ¹	France	40.0	27.5	12.5	8.3	88.4
5	Salesforce	US	36.4	30.0	11.6	10.0	88.0
6	Oracle	US	36.0	30.0	12.5	9.2	87.7
7	Siemens ²	Germany	34.6	30.0	11.0	10.0	85.6
8	Clario	US	36.7	17.5	11.6	8.3	74.1
9	Adobe	US	25.4	30.0	8.6	8.3	72.3
10	Clarivate	UK	35.8	17.5	6.8	10.0	70.1
11	MasterControl	US	25.4	25.0	10.1	9.2	69.6
12	TraceLink	US	24.6	25.0	10.8	8.3	68.8
13	ZS	US	24.6	20.0	11.6	10.0	66.2
14	ValGenesis	US	20.9	25.0	10.1	9.2	65.1
15	Rockwell Automation	US	23.5	25.0	9.3	5.8	63.6
16	Ennov	France	22.5	25.0	7.3	7.5	62.3
17	eClinical Solutions	US	20.9	22.5	10.4	8.3	62.2
18	Suvoda	US	29.2	12.5	8.2	8.3	58.2
19	ArisGlobal	US	28.0	17.5	8.2	4.2	57.9
20	SpotMe	Switzerland	17.1	25.0	7.4	7.5	57.1
21	Datavant	US	27.1	12.5	8.6	8.3	56.5
22	Certara	US	28.8	12.5	10.4	4.2	55.8
23	Kinaxis	Canada	17.1	25.0	7.4	5.8	55.3
24	Blue Yonder	US	17.1	25.0	6.3	6.7	55.0
25	Saama	US	15.2	22.5	10.4	6.7	54.8

¹ Dassault Systèmes also includes the capabilities of Medidata

² Siemens also includes the capabilities of Dotmatics

Everest Group Top 50™ Pharmaceutical Technology Providers 2026 (page 2 of 2)

Rank	Technology provider	HQ	Market adoption and scale score	Innovation, investment, and partners score	Value realization and outcomes score	Client and geographic coverage score	Final score
26	ConcertAI	US	24.0	17.5	6.3	6.7	54.5
27	Honeywell	US	17.4	20.0	8.6	8.3	54.3
28	S3 Connected Health	Ireland	17.8	20.0	8.2	8.3	54.3
29	Huma	UK	22.6	12.5	10.1	9.2	54.3
30	YPrime	US	18.8	17.5	10.6	6.7	53.6
31	Signant Health	US	29.2	7.5	10.2	5.8	52.7
32	Merative	US	22.6	12.5	7.4	10.0	52.5
33	Exeevo	US	14.2	22.5	8.9	6.7	52.3
34	Körber Pharma	Germany	24.6	12.5	8.2	6.7	52.0
35	Komodo	US	22.0	17.5	8.4	4.2	52.0
36	Endpoint Clinical	US	20.9	17.5	5.2	8.3	51.9
37	Trueblue	Italy	15.2	17.5	9.1	10.0	51.8
38	Doceree	US	16.8	17.5	9.9	7.5	51.6
39	Controlant	Iceland	20.9	15.0	11.6	4.2	51.6
40	Anju Software	US	18.8	22.5	5.2	5.0	51.5
41	Viedoc Technologies	Sweden	19.6	12.5	9.3	10.0	51.4
42	MaxisAI	US	17.1	17.5	9.9	6.7	51.2
43	Perceptive	UK	32.1	2.5	8.2	8.3	51.2
44	Pega	US	15.0	30.0	3.7	2.5	51.1
45	Healthverity	US	18.8	20.0	8.9	2.5	50.2
46	Emmes	US	15.4	20.0	8.2	5.0	48.6
47	Medable	US	14.8	25.0	5.9	2.5	48.3
48	EDETEK	US	17.1	17.5	5.1	5.8	45.5
49	ACTO	Canada	11.5	17.5	8.9	7.5	45.4
50	IntegriChain	US	21.3	7.5	9.1	7.5	45.4

Coverage across value chain areas (page 1 of 2)

Rank	Service provider	Pharmaceutical value-chain coverage					
		Drug / Device discovery and research	Clinical development	Manufacturing operations	Sales and marketing	Supply chain and distribution	Pharmacovigilance and safety
1	IQVIA	✓	✓	✓	✓	✓	✓
2	Veeva Systems		✓	✓	✓		✓
3	SAP			✓		✓	
4	Dassault Systèmes	✓	✓	✓			
5	Salesforce		✓		✓		
6	Oracle		✓	✓		✓	✓
7	Siemens	✓		✓			
8	Clario		✓				
9	Adobe				✓		
10	Clarivate	✓	✓	✓		✓	✓
11	MasterControl			✓			
12	TraceLink					✓	
13	ZS	✓	✓	✓	✓	✓	
14	ValGenesis		✓				
15	Rockwell Automation			✓			
16	Ennov		✓	✓	✓		✓
17	eClinical Solutions		✓				
18	Suvoda		✓				
19	ArisGlobal		✓		✓		✓
20	SpotMe				✓		
21	Datavant		✓		✓		
22	Certara	✓	✓		✓		
23	Kinaxis					✓	
24	Blue Yonder					✓	
25	Saama		✓				

Coverage across value chain areas (page 2 of 2)

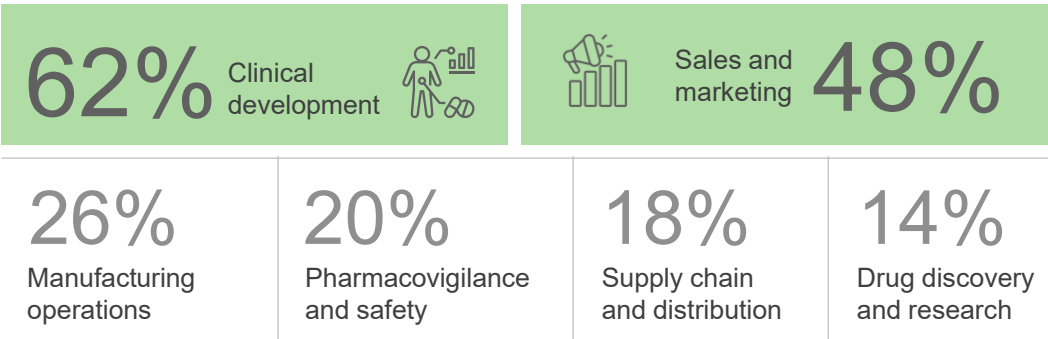
		Pharmaceutical value-chain coverage					
Rank	Service provider	Drug / Device discovery and research	Clinical development	Manufacturing operations	Sales and marketing	Supply chain and distribution	Pharmacovigilance and safety
26	ConcertAI		✓		✓		
27	Honeywell			✓			
28	S3 Connected Health		✓		✓		✓
29	Huma		✓		✓		
30	YPrime	✓	✓				
31	Signant Health		✓				
32	Merative		✓		✓		
33	Exeevo				✓		
34	Körber Pharma			✓			
35	Komodo				✓		
36	Endpoint Clinical		✓				
37	Trueblue				✓		
38	Doceree				✓		
39	Controlant					✓	
40	Anju Software		✓		✓		
41	Viedoc Technologies		✓		✓		
42	MaxisAI		✓				
43	Perceptive		✓				
44	Pega				✓		✓
45	Healthverity		✓		✓		
46	Emmes		✓				✓
47	Medable		✓				
48	EDETEK		✓				
49	ACTO				✓		
50	IntegriChain				✓		

Distribution of Everest Group’s Top 50 Pharmaceutical Technology Providers by value chain focus

Exhibit 1: Distribution of Everest Group Top 50 Pharmaceutical Technology Providers by value chain focus

Source: Everest Group (2026)

High penetration of pharmaceutical technology providers



We take a closer look at the split below

- Provider concentration in clinical development is reinforced by the industry’s shift to decentralized and hybrid trials, where sponsors need integrated technology stacks to manage remote activities, diverse data sources, and risk-based oversight at scale
- Commercial technology demand continues to expand on the back of the Veeva-Salesforce split as pharma buyers continue to make their CRM decisions. The commercial segment is benefiting from sustained investments in omnichannel enablement, better customer data unification, and AI-supported personalization across HCP and stakeholder engagement
- While fewer Top 50 providers focus on manufacturing, quality, and safety, demand in these areas is accelerating. Digital transformation programs, such as Pharma 4.0, continue to prioritize efficiency and quality and compliance outcomes, driving greater interest in Manufacturing Execution System (MES) / Electronic Batch Records (EBR) modernization, integration with enterprise systems (Enterprise Resource Planning (ERP) / Electronic Quality Management System (eQMS) / Laboratory Information Management System (LIMS), and traceability-led capabilities. With respect to safety, pharmacovigilance operations are increasingly pursuing automation and AI-enabled case processing and signal detection, pointing to rising opportunities for providers with scalable, compliant-by-design safety platforms

Clinical and commercial workflows remain the primary focus areas for pharmaceutical technology providers.

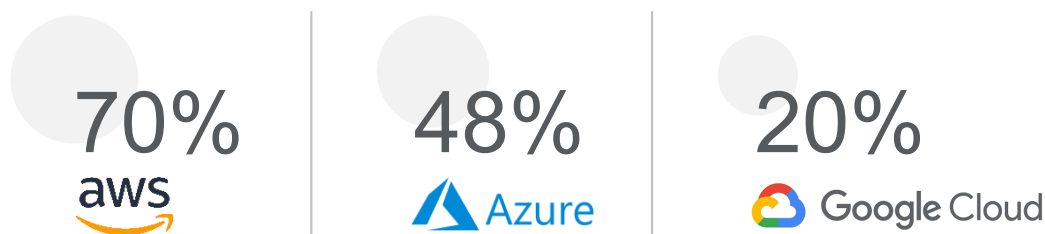
Role of hyperscalers in pharmaceutical technology

An Everest Group survey of leading pharmaceutical technology providers indicated that 67% of technology providers are completely cloud-native.¹ Hyperscalers such as Amazon Web Services (AWS), Microsoft Azure, and Google Cloud Platform (GCP) are increasingly becoming foundational partners for pharmaceutical technology providers, as they modernize regulated workloads and scale SaaS delivery across the value chain.

Hyperscaler partnerships are therefore less about hosting and more about accelerating compliant modernization. Providers are leveraging hyperscaler capabilities to shorten deployment cycles while maintaining GxP-aligned controls, audit trails, and data integrity across highly regulated processes. At the same time, hyperscalers' expanding pharmaceutical investments, spanning interoperability services, security tooling, and compliance-oriented resources are enabling providers to connect fragmented data estates and advance analytics- and AI-enabled use cases without sacrificing governance.

As organizations prioritize modernization and AI-enabled transformation, hyperscaler ecosystems are expected to play a larger role in enabling repeatable governance patterns, elastic compute for advanced analytics, and secure global infrastructure to support regulated operations at scale.

The Top 50 Pharmaceutical Technology Providers are partnering with cloud hyperscalers in their industrial cloud journeys. AWS dominates the scale of partnerships with Everest Group's Top 50 Pharmaceutical Providers.



In pharma technology, hyperscaler choice is no longer an infrastructure decision; it is a strategic bet on how platforms will scale, differentiate, and compete in an AI-enabled market

¹ Everest Group survey of leading pharmaceutical technology providers; n = 24

Why pharmaceutical technology providers prefer AWS, Azure, and GCP



- Comprehensive security architecture backed by broad compliance certifications, enabling audit-ready adoption in regulated environments
- High-performance data and compute engines (HPC, GPUs, big data) that support scale-intensive workloads and advanced analytics needs
- Strong life sciences and pharmaceutical value chain-aligned solutions and accelerators, complemented by flexible commercial models to support varied adoption journeys



- Operational continuity advantages through built-in disaster recovery and uptime SLAs, strengthening confidence for mission-critical production environments
- Robust governance and security postures, where compliance controls are at par with compute capabilities
- Favorable for connected environments in which pharmaceutical firms require interoperability / data integration in complex enterprise environments



- AI/data-forward positioning linking GCP to AI/ML-led differentiation rather than purely infrastructure-driven value
- Strength in modern data architectures, where database services and interoperability capabilities jointly show up as core reasons for preference
- A supportive storage layer that complements data and AI priorities for solution providers building data-intensive offerings

Core capabilities that hyperscalers are leveraged for¹

Descending

order of priority

Compute (elastic compute, GPU/CPU clusters)

Storage and archival (cloud storage, backup, archive)

Databases and data management (data warehouses, ingestion)

AI/ML (model training, deployment)

Security and compliance (access control, encryption, regulatory compliance)

Data integration and interoperability (data pipelines, data lakes, system connectivity)

DevOps and automation (Infrastructure as Code, container orchestration)

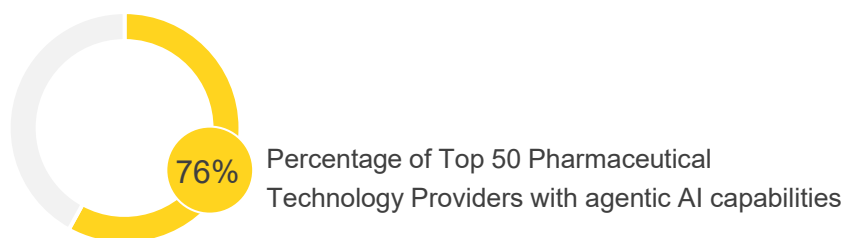
Networking and connectivity (hybrid cloud)

Analytics and visualization (dashboards, reporting)

¹ Everest Group survey of leading pharmaceutical technology providers; n = 24

The shift to agent-enabled pharma technology

Agentic AI is rapidly moving from concept to product reality in the pharma technology ecosystem, as providers look beyond copilots to goal-driven agents that can orchestrate multi-step workflows across systems under strict controls. Everest Group's survey of 24 leading pharmaceutical technology providers indicated that almost all providers were actively investing and developing agentic AI capabilities, with less than 5% of the respondents indicating that agentic AI is under evaluation or in the PoC stage in their organizations.



What providers are prioritizing and where agents are being used

Workflow focus: Early agentic AI deployment is focused in commercial/medical engagement and data/analytics-driven use cases, followed by clinical operations and regulatory/compliance workflows, reflecting the demand for faster decisions and coordinated actions across fragmented systems.

Monetization direction: Pricing is still evolving, with the most common approach being bundling agentic AI into existing platform subscriptions, alongside user-based and custom pricing, indicating that providers are initially using agentic AI to strengthen core platform value before fully shifting to consumption- or outcome-based models.

The future of pharmaceutical technology with Systems of Execution (SoE)

Defining SoE and their relevance

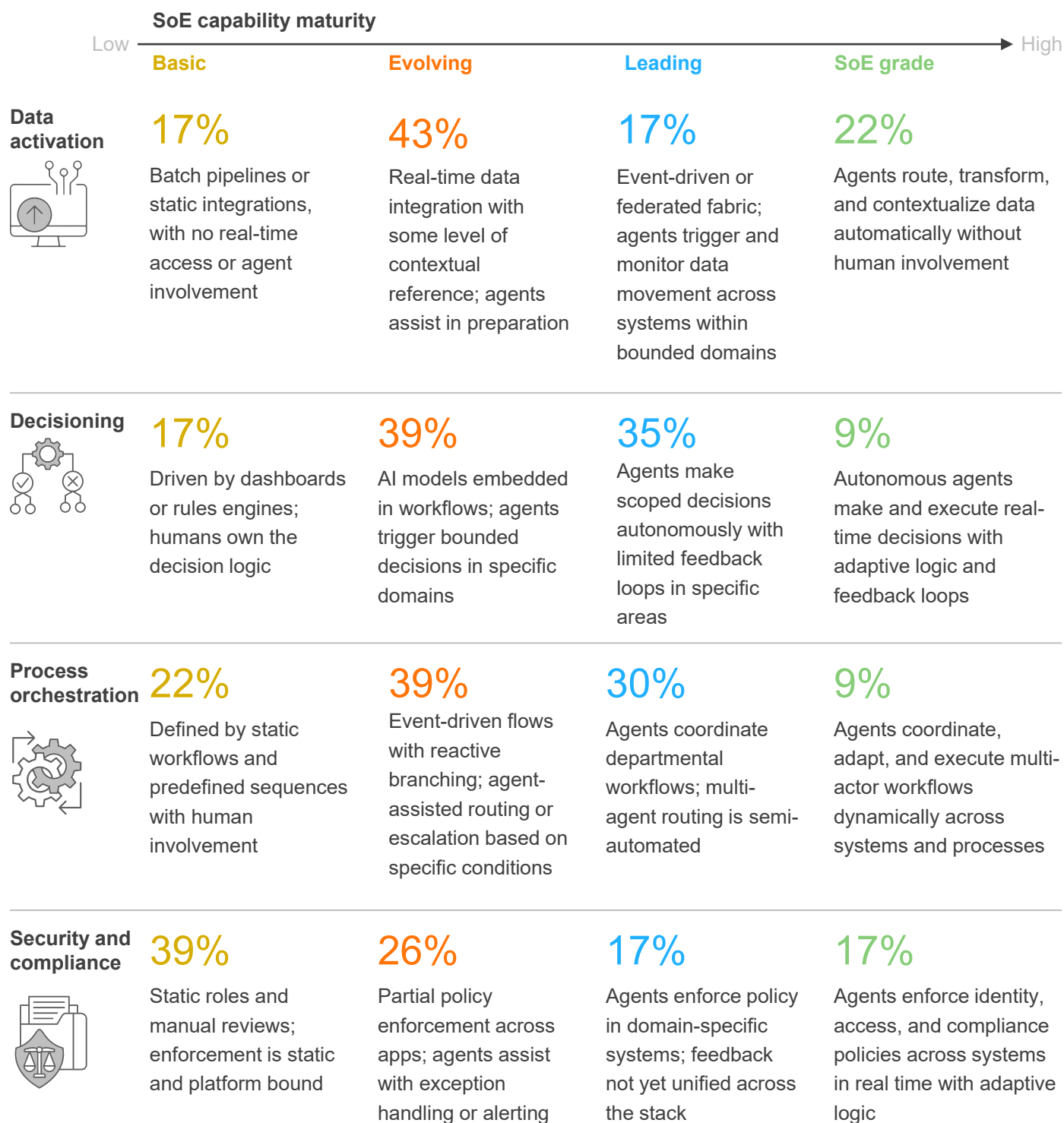
SoE are an emerging operating layer that enable pharmaceutical enterprises to move from digitizing workflows to executing outcomes end-to-end across functions and systems. SoE orchestrate autonomous actions across fragmented applications, data, and teams while maintaining the rigor required in regulated environments.

Activating SoE at scale depends on four foundational pillars: data activation, decisioning, process orchestration, and security and compliance.

We assess provider readiness across these building blocks to understand where pharmaceutical technology providers are on their SoE activation journeys.

Exhibit 2: Measuring organizations' SoE capability maturity¹

Source: Everest Group (2026)

¹ Everest Group survey of leading pharmaceutical technology providers; n = 24

What the maturity distribution reveals about providers' readiness to operationalize SoE

- Most providers are still building the execution backbone. “Evolving” maturity stage dominates across data activation, decisioning, and process orchestration, indicating progress beyond stand-alone automation toward more event-driven, agent-enabled execution
- Closed-loop execution remains limited at scale. The relatively small “fully advanced” footprint in decisioning and orchestration suggests that few providers have agents operating with continuous feedback and dynamic cross-system execution in production environments
- Governance will determine the pace of SoE adoption. Security and compliance shows the highest concentration at the basic stage, reinforcing that SoE success will hinge as much on policy enforcement, end-to-end traceability, and governance maturity as on underlying model capability

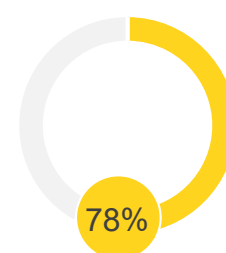
Cloud of choice for activating SoE-grade capabilities

Activating SoE at scale depends on more than cloud infrastructure; it requires elastic compute, integrated data services, and enterprise-grade governance that can withstand regulated pharmaceutical operating environments. Everest Group's survey indicates that providers most often view AWS and Microsoft Azure as the strongest foundations for reaching fully advanced agentic AI maturity, reflecting confidence in these ecosystems to combine scale with the security, compliance, and integration depth needed to operationalize cross-functional execution.

In the next phase of pharmaceutical modernization, competitive advantage will increasingly be defined by the ability to operationalize SoE – moving from AI features to enterprise execution at scale through autonomous agents that can action in real time.

Role of System Integrators (SIs) and the partnership ecosystem with Top 50™ Pharmaceutical Technology Providers

SIs play an increasingly central role in pharmaceutical technology transformations, serving as both strategic and technical partners as enterprises modernize regulated workflows across clinical, quality, safety, and commercial operations. Their role extends beyond deployment and integration to include operating model alignment, process redesign, and risk management – capabilities that are critical when transformation programs must balance speed with validation rigor and audit readiness.



Percentage of Top 50™ Pharmaceutical Technology Providers partnering with SIs

Partnership maturity of the Top 50™ pharmaceutical technology providers with their existing SIs¹

53%

have a **transactional partnership**: engagement limited to account-level interactions and periodic check-ins with minimal joint planning

24%

have a **strategic alliance**: multi-year alliance with jointly owned product/IP, dedicated governance, and shared economics

24%

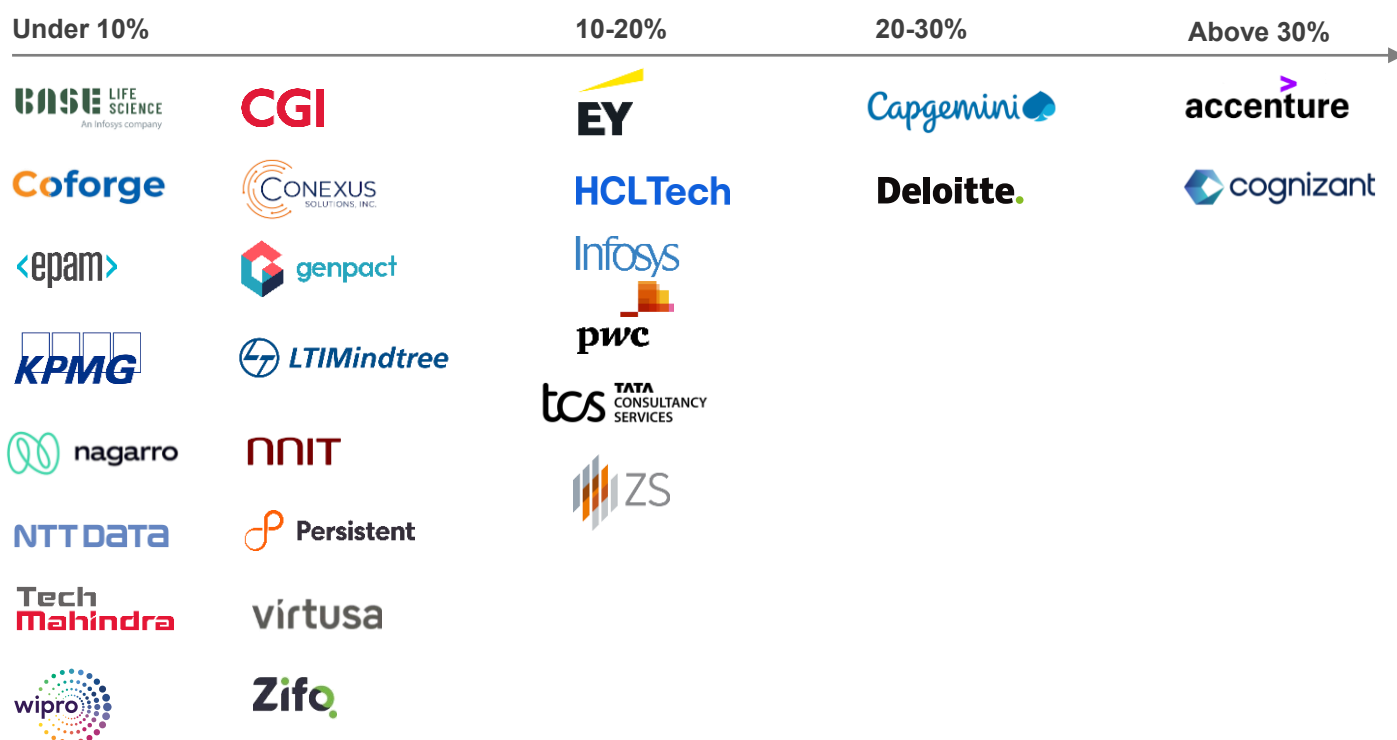
have a **go-to-market** collaboration: structured partnership with regular joint account targeting and coordinated marketing activities

Only a small subset of pharmaceutical technology providers has progressed to strategic alliance-level depth with at least one SI, while most are still operating SI partnerships primarily as implementation / delivery channels.

Exhibit 3: Proportion of SIs and major consulting firms that partner with Everest Group's Top 50™ Pharmaceutical Technology Providers

Source: Everest Group (2026)

[NOT EXHAUSTIVE]



¹ Everest Group survey of leading pharmaceutical technology providers; n = 24

Consulting-led firms bring complementary strengths that extend beyond delivery, helping pharma enterprises translate platform adoption into measurable transformation outcomes with their management consulting experience.

The SI ecosystem enables pharmaceutical enterprises to navigate complex, regulated transformations by combining implementation scale with strategic direction. It helps enterprises in standardizing workflows, strengthening data integrity and traceability, and integrating fragmented technology landscapes. As the market evolves, the role of these partners is expected to deepen further, driven by increasing emphasis on AI-enabled automation, compliant-by-design operating models, and cross-platform orchestration required to deliver end-to-end outcomes at scale.

Implications for pharmaceutical technology providers

- **Evolve from supplier to strategic partner.** Enterprises increasingly expect providers to invest in business-aligned roadmaps, regulatory fluency, and co-innovation models, acting as trusted long-term partners
- **Accelerate the adoption of cloud-first, modular architectures.** Cloud-native, API-first, and modular architectures that support rapid configuration, seamless integration with enterprise ecosystems, and compliance with industry data standards are now the baseline expectation
- **Embed responsible and explainable AI.** Providers must design solutions with built-in explainability, bias testing, validation accelerators, and human-in-the-loop controls. Audit-ready gen AI copilots and AI governance toolkits will differentiate providers in regulated contexts
- **Strengthen hyperscaler partnerships.** As enterprises embrace cloud and agentic AI, providers must cultivate deep, differentiated partnerships with hyperscalers, allowing accelerated access to AI capabilities
- **Converge safety, quality, and risk intelligence.** Enterprises demand platforms that go beyond siloed compliance. By converging safety, quality, and risk workflows into unified systems, providers can apply advanced analytics to surface early risk signals, enhance decision-making, and improve enterprise-wide resilience
- **Collaborate closely with SI and consulting partners.** Pre-packaged integrations and co-selling with SIs remain critical to scaling adoption and extending client reach

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