

AN INDUSTRY IN TRANSITION

Life Sciences Index 2026

CHAPTER SIX: FUTURE OF CARE DELIVERY AND CONCLUDING REMARKS

Future of care delivery

To understand how life sciences innovators think the world of healthcare is evolving, we asked respondents how much they agreed with a set of statements about the world of care delivery ten years from now (**Figure 22**).

The statement that most respondents strongly agree with (rating of 6 or 7 on a 7-point Likert scale: 55%; 78% agreed at least partially), is that significantly more care will be delivered out of hospital via dedicated satellite facilities. This statement has moved up from fifth place since 2024 and highlights that the trend towards decentralised, more patient-centric care, is making good progress.

This is largely thanks to technological innovation – such as minimally invasive techniques, portable diagnostics, remote monitoring technology and modern networking technology – allowing many more procedures to be performed in outpatient settings.

Patients prefer care closer to home and are increasingly expecting it to be as accessible as retail experiences, reflecting the consumerisation of healthcare. Satellite facilities offer localised, more accessible care without the overhead of large hospitals, reducing the strain on emergency and acute care needs, cutting wait times

for elective procedures, and helping to lower overall healthcare costs. They're also often modular and easily scalable, allowing flexible deployment based on changing population needs.

Overall, there are clear benefits to both patients and healthcare providers. And for innovators, especially those in medtech, satellite facilities offer opportunities to extend the depth and breadth of their offering across the care continuum.

But moving towards a more decentralised model of care delivery creates increased complexity in the ecosystem. Stakeholder collaboration is becoming ever more important. We're seeing a rise in integrated care networks (ICNs) which have worked well in Germany, and an evolution in public private partnerships (PPPs), from a focus on improving infrastructure and operations, to one on improving overall quality of care delivery.

“We see more large healthcare providers and governments looking to us to work with them to optimise care.”

Medtech respondent

PPPs can be applied to a wide range of healthcare needs, where private sector skills, experience and access to capital can be used to achieve care delivery goals. This means PPPs are expanding across the care continuum, supporting governments with improving access to care beyond the hospital.

But there are challenges. The biggest one is often a healthcare system mindset that focuses on immediate cost savings and urgent care, rather than the long-term health and financial benefits of moving non-urgent care into the community, making it extremely difficult to move resources and capabilities out of the traditional hospital model.

Satellite facilities might offer a more immediate return on investment for healthcare systems and top the list of future-looking statements in our survey. But statements around virtual care, at-home care and an overall shift in focus towards prevention and way from treatment and cure, continue to feature at the bottom of the list in terms of what's achievable in a decade. Complexity, cost, stakeholder mindset, bigger priorities, pace of innovation of enabling technologies. All can be used in different combinations to explain the slower progress in these areas.

Many respondents agree that innovators will be key stakeholders in delivering care to patients throughout their journey (53% strongly agreed; 78% at least partially), and that precision medicine will be the norm (49% strongly agreed; 77% at least partially).

Healthcare systems are increasingly embracing collaboration and co-creation with innovators, acknowledging the unique set of skills and resources they can bring to the table to truly push the needle when it comes to access to and quality of care. No longer simply product suppliers operating in a silo, they're now care partners focused on optimising the care continuum and patient and HCP experiences, as well as clinical outcomes.

There's no doubt that precision and personalisation is the future of healthcare, and the sector has made great strides on the precision front, thanks to data and technological advances.

The omics revolution is enabling large-scale patient stratification. For example, targeted oncologics based on tumour genomics are reshaping the standard of cancer care. And pharmacogenomics is helping to produce safer and more efficacious therapies.

Precision medicine benefits from clear, quantifiable biomarkers and AI-driven analytics making it easier to define and regulate treatments for genetically stratified subgroups. In the world of medtech, devices are getting smaller, faster, smarter and more precise, because of relentless software (eg AI) and hardware (eg semiconductor) innovation.

While we're seeing more personalised treatment, for example in the form of autologous cell and gene therapies and surgery highly tailored to specific individuals using AI, robotics and 3D printing, truly personalised care is harder to achieve. It encompasses the full profile of an individual patient – genetics, lifestyle, environment, behaviour and preferences. It's about individualising care models and patient-provider relationships. This much richer but complex model of care will take time to realise due to significant challenges with data integration, healthcare system readiness and concerns around ethics and equity (eg how do we avoid bias in personalisation?). Respondents think personalised care journeys is less achievable by 2036 than several other future-looking statements we put to them.

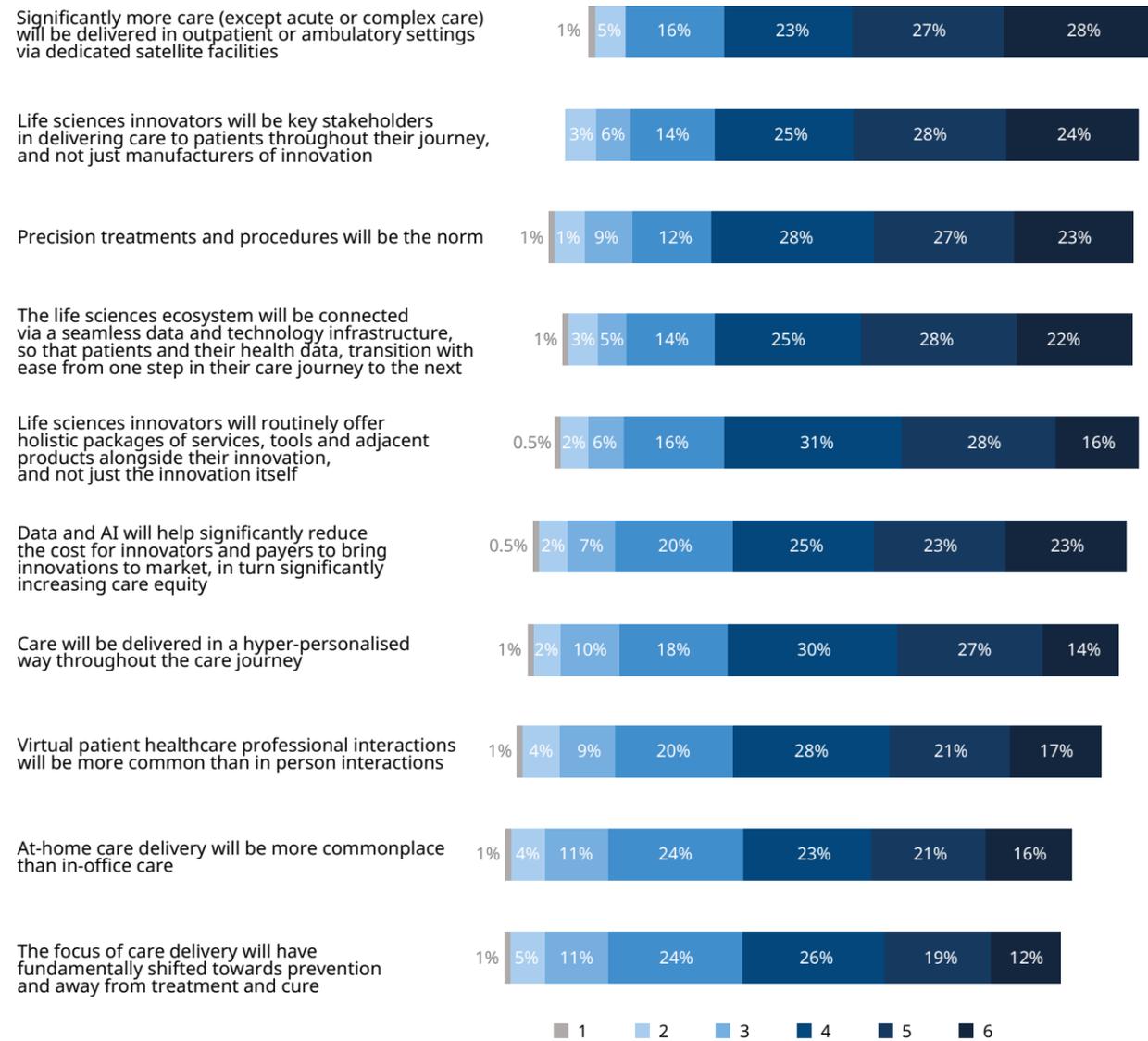
It seems less likely that innovators will offer a seamless data and tech infrastructure and holistic care packages. Both statements have dropped two places since 2024 in terms of the percentage of respondents at least partially agreeing to these future scenarios (76% each).

This could reflect the increasing realisation of the scale of the challenge in terms of leveraging data and technology in healthcare systems. The building blocks are there (data and tech innovation). But the foundations (aging, fragmented and resource-constrained healthcare systems) are the main limiting factor, whether it's about providing a seamless, data-connected care journey or innovators providing holistic care offerings.

“Our growth is increasingly centred around integrated care models, AI-powered personalisation and value-based innovation, including investments that combine therapy with real world services.”

Biopharma respondent

Figure 22: How much do you agree with these statements about the future of care delivery?
 In ten years: 1 to 7 rating (1 is don't agree at all, 4 is neutral, 7 is completely agree).



Innovators have to stay ahead of the curve and continuously anticipate changes in the healthcare landscape. If respondents said they strongly agreed with a statement, we asked how well prepared their business is to capitalise on this expected future.

For the top six future scenarios in **Figure 23**, life sciences innovators are better prepared than they were two years ago – more businesses are very well aligned than partly aligned, while the opposite was true in 2024.

Respondents agreed least with the statement that by 2036 care will fundamentally be focused on prevention and proactivity (**Figure 22**).

But it's one of the future scenarios innovators are most aligned to, highlighting their recognition of the paradigm shift in healthcare (**Figure 23**).

Across all statements, substantial proportions still say their businesses are only partly aligned, highlighting that there's much more to do to prepare for growth in the future healthcare landscape.

The innovators we surveyed are least prepared for virtual and at-home care delivery. These care settings are reshaping how biopharma and medtech innovators engage with patients, develop products and deliver value.

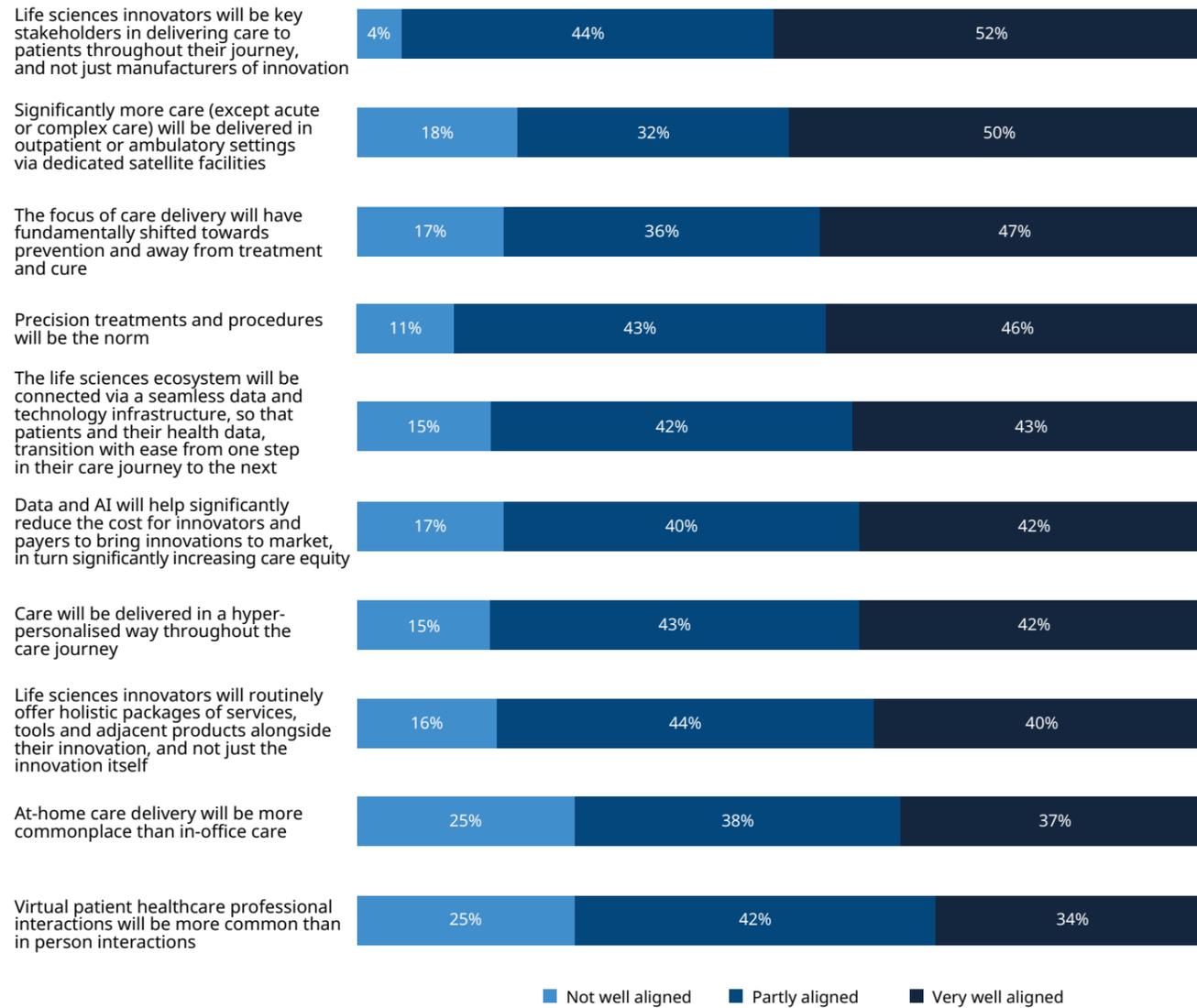
“We have in-house patient navigation programs that use AI to reach out to patients to ensure test completion. We also focus on a portfolio of products that can be used in the oncology space at all phases of screening, diagnosis and treatment guidance. This ensures a portfolio approach and builds strong customer relationships.”

Biopharma respondent



Figure 23: How well aligned is your business' growth strategy to the future scenario(s) you strongly agree with?

Statements in order of most aligned to least aligned



Take at-home care delivery as an example of what innovators need to think about. In biopharma, dosage forms are needed that support at-home administration; in medtech, devices need to be designed for the home environment – how can they be safe, easy-to-use and connected for at-home use?

Products need to be safe, usable and compliant outside of controlled clinical environments, and support continuous care, better adherence and real-world data collection. For medtech in particular, they also need to be inclusive, scalable and adaptable to diverse home settings.

Distribution models also need to be rethought, including cold chain, last-mile delivery and remote support infrastructure. And in the virtual care setting, there are opportunities for innovators to offer subscription-based services and digital companion apps.

Finally, innovators need to partner – for example with telehealth providers, payers and home care providers – to effectively manage care and data outside hospitals. With various governments pushing for decentralised care models, it will become increasingly important for innovators to incorporate these out-of-hospital settings into their strategic thinking.

“Patients are resistant to take time away from work to visit HCPs. There is also a larger focus on reaching less served populations who may lack transportation and/or live in remote areas that lack healthcare infrastructure. ESG programs focus on reaching these underserved patients with appropriate healthcare solutions (at-home and virtual care delivery).”

Biopharma respondent

Concluding remarks

The life sciences sector is navigating a complex and rapidly evolving global landscape shaped by geopolitical shifts, economic pressures and technological breakthroughs. The past few years have demonstrated the sector's resilience, but it's in a state of recalibration.

Politics are reshaping regulatory environments and funding priorities. Inflation, supply chain disruptions and margin compression are forcing companies to adopt leaner and more efficient business models.

Asian markets, particularly China, South Korea and India, are rising as world-leading life sciences hubs, and regional supply chains are gaining importance. And the lessons learnt from the pandemic continue to influence the way healthcare systems – and innovators – operate and collaborate.

Despite a slight decline in overall market attractiveness, life sciences innovators are still optimistic for the year ahead. The dealmaking landscape – while more cautious than in 2024 and with businesses more focused on organic growth – is still a critical lever for innovation.

Partnerships and strategic alliances are particularly important, and earlier-stage investments represent a key route to innovation in the face of stiff competition for market-ready assets. Advanced therapeutics are pushing the boundaries of medicine, but pricing and reimbursement challenges are still the biggest barrier to ensuring optimal access.

Intelligent technology is emerging as a transformative force across the industry, with AI integration expanding beyond commercial and R&D to cover the entire value chain. But businesses have to address barriers like infrastructure gaps, regulatory complexity and talent shortages to fully realise its potential.

Sustainability, while less of a stated priority, is evolving into a more BAU activity and is more governance-led, with boards increasingly equipped to drive sustainability efforts from within.

The future of care delivery is one of decentralisation, tech-enablement and precision, with innovators preparing to play a broader role across the care continuum to improve experiences and health outcomes.

Ultimately, the Life Sciences Index 2026 paints a picture of an industry in transition – one that's adapting to complexity with strategic clarity and technological ambition. Success will depend on how effectively life sciences businesses can embrace advances in science and technology and align with emerging care models. But they also have to strengthen compliance, foster collaboration and build agility.

[Marco de Morpurgo](#), Global Co-Chair of Life Sciences, says: "The life sciences industry is really at a crossroads right now. We're seeing a wave of transformation driven by both external pressures

and internal dynamics. On the outside, regulatory landscapes are shifting, patient expectations are evolving, and technology is advancing faster than ever. Internally, organisations are grappling with the need to modernise legacy systems, streamline operations, and foster innovation while managing cost pressures. It's a complex mix, and it means the old ways of working don't cut it anymore. The new world demands agility, collaboration and a willingness to rethink the entire value chain."

"In terms of the legal landscape, it's as global, fast-moving and complex as the science and technology driving this sector. But it's more fragmented. From navigating evolving regulations and resolving high-stakes disputes to structuring cross-border deals and managing risk across jurisdictions, our Life Sciences team provides the clarity and confidence innovators need to move boldly into the future. We're here to help them stay agile and connected across markets, turning legal complexity into strategic advantage, so that they can focus on delivering the next breakthrough innovation to the people who need it the most."

Key contacts



Marco de Morpurgo
Global Co-Chair,
Life Sciences
marco.demorpurgo@dlapiper.com



Emilio Ragosa
Global Co-chair,
Life Sciences
emilio.ragosa@us.dlapiper.com



Dr Lyndsey Hudson
Head of Strategic Delivery,
Life Sciences
Author of Life Sciences Index 2026
lyndsey.hudson@dlapiper.com

About us

Our award winning lawyers combine subject matter expertise with deep sector knowledge to support all your legal needs. We provide comprehensive advice and representation across the full product lifecycle, including regulatory and strategic advice, corporate and commercial transactions, and disputes.

Our clients span the full life sciences ecosystem, from the largest pharmaceutical and medtech innovators, biotech and healthtech trailblazers, suppliers and distributors, to contract research organisations, diagnostic companies, care providers, investors and payers.

Working across more than 40 jurisdictions and always exposed to the latest innovations – including mRNA vaccines, cell and gene therapies and cutting-edge healthtech – our global team can help you succeed.

dlapiper.com