

Veeva Services 2025 Market Insights™

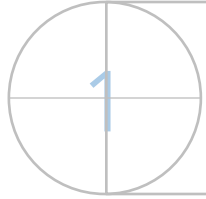
Enabling life sciences companies
to accelerate digital transformation
through the Veeva platform

April 2025

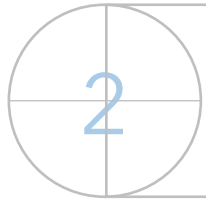
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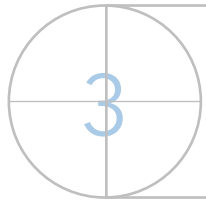
About Veeva Services 2025 RadarView



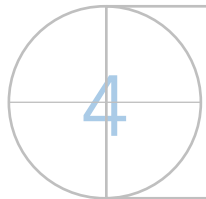
Life sciences companies are leveraging integrated, cloud-based platforms to accelerate their solutions' time to market by unifying R&D processes, streamlining trial management, and enabling real-time collaboration across clinical, data, and regulatory teams.



Avasant evaluated 63 service providers using a rigorous methodology across the key dimensions of practice maturity, partner ecosystem, and investments and innovation in the Veeva services space. Through our analysis, we recognized 11 providers that brought the most value to the market over the past 12 months.



The *Veeva Services 2025 RadarView* aims to provide an in-depth capability assessment of the leading service providers offering services to life sciences organizations. Based on our methodology, we have categorized the service providers into four broad segments: leaders, innovators, disruptors, and challengers.



To enable decision-making for enterprises, Avasant has provided an overview of the major service providers in the industry. This includes details of their practice size, key IP assets/solutions, partnerships, sample clients, subindustry focus, and case studies. This is supported by an analyst's take on the providers across the three key dimensions defined in the second point above.



Executive summary

Veeva services: Scope

The report focuses on service providers delivering Veeva services across the full spectrum of Veeva solutions, catering to commercial businesses operating within the pharmaceutical, life sciences, and medical devices sectors:

Type of coverage	Description	Enterprise illustrative examples
IT service providers	IT services companies offering Veeva services to pharmaceutical, life sciences, and medical devices clients to enable streamlined operations, enhanced compliance, and optimized engagement.	
Niche or boutique service providers	Niche or boutique providers specializing exclusively in Veeva services, delivering highly tailored solutions solely for pharmaceutical, life sciences, and medical devices clients.	

Veeva services definition: Veeva services for the life sciences industry require deep expertise in CRM, content management, quality, and regulatory processes. Veeva specialists deliver efficient implementation, integration, customization, and support across the Veeva value chain. Their offerings span consulting, data migration, configuration, system integration, development, and managed services, driving operational efficiency, regulatory compliance, and innovation.

We will assess service providers’ offerings across the Veeva value chain components:

Development Cloud				Commercial Cloud		Data Cloud
Clinical	Regulatory	Quality	Safety	Customer Engagement	Medical Affairs	Data Cloud
Vault eTMF	Vault RIM	Vault QualityDocs	Vault Safety	Veeva CRM	Vault MedComms	Veeva Nitro
Vault CTMS	Vault Submissions	Vault QMS	Vault SafetyDocs	Veeva Vault CRM	Vault MedInquiry	Veeva Compass
Vault EDC	Vault Submissions Archive	Vault Product Surveillance	Vault Signal Detection	CRM MyInsights	Medical CRM	Veeva Crossix
Vault CDMS	Vault Registrations			CRM Engage		Veeva OpenData
SiteVault				Vault PromoMats		Veeva Link
				Veeva Claims		

Executive summary: Key life sciences trends shaping the Veeva market

Key drivers



Bringing innovative therapies to market quickly requires unified, agile development platforms that enhance collaboration across R&D processes



Aligning commercial strategies to boost engagement with customers and expand market access



Need to streamline quality processes, enhance product safety, and support real-time, risk-based decision-making across global operations

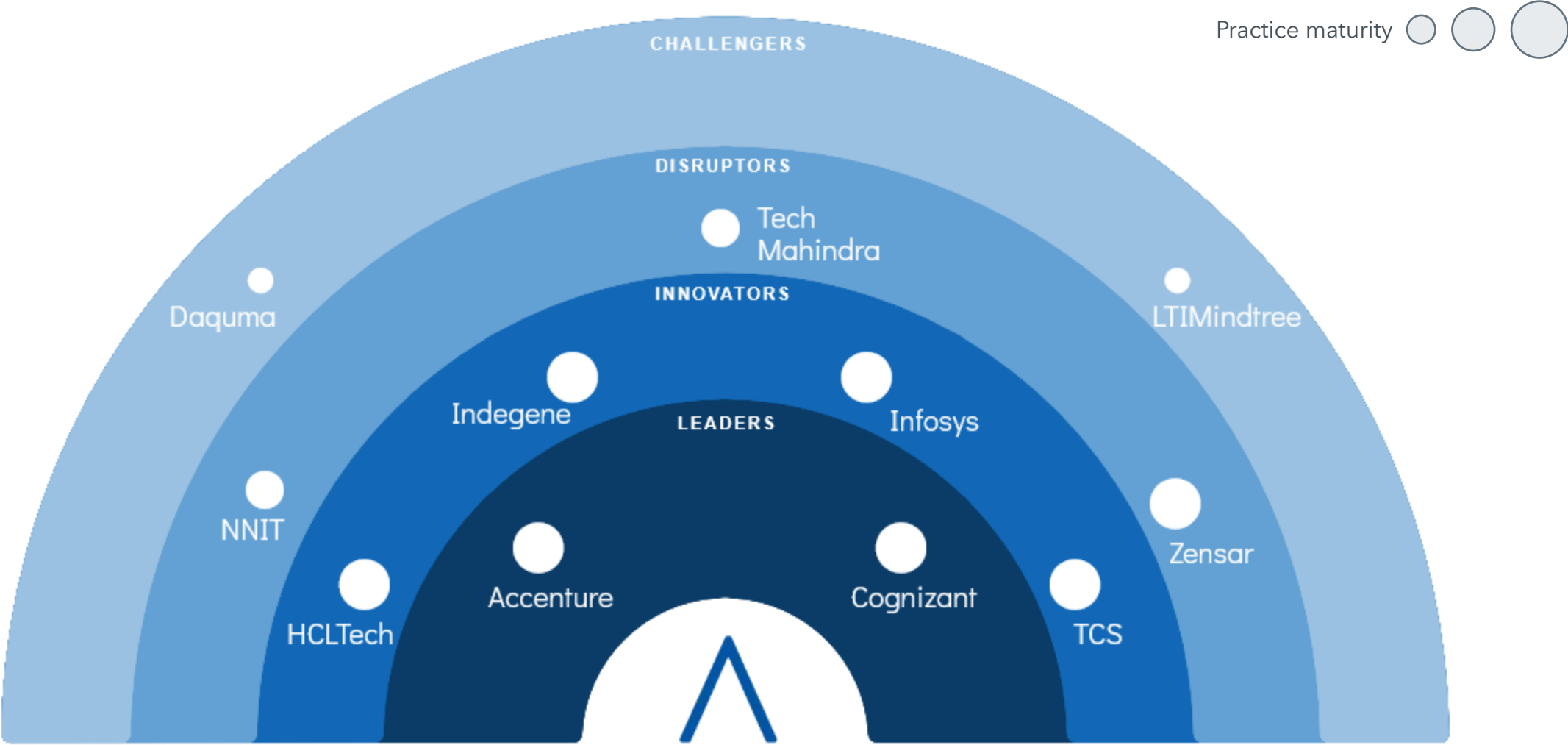


Stringent global regulations require life sciences companies to manage data, documents, and processes in a compliant, auditable, and consistent manner

Enterprise response

- Life sciences companies are adopting integrated clinical platforms to centralize trial management, streamline data collection, and eliminate silos between clinical operations, data management, and regulatory teams.
- They are accelerating the move to cloud-based R&D solutions by consolidating legacy systems into agile platforms, which will enable faster trial startup, real-time collaboration, and improved protocol compliance.
- Life sciences organizations are reimagining commercial processes to enable more patient-centric engagement, support personalized adherence programs, and scale direct-to-consumer outreach through integrated digital health tools and telehealth channels.
- They are tweaking their digital commercial strategies for AI-driven engagement, omnichannel orchestration, and real-time analytics to deliver personalized, data-informed experiences to healthcare professionals and patients.
- Life sciences organizations are utilizing integrated digital quality management systems (QMS) to streamline quality events, automate document control, and maintain global consistency across audits, training, and change management.
- They are leveraging cloud-based safety systems and centralized data platforms to improve signal detection, streamline adverse event reporting, and enable faster, more accurate safety assessments across the product life cycle.
- Life sciences organizations are digitizing regulatory document workflows with secure, compliant platforms that support version control, audit trails, and streamlined collaboration for submission preparation and health authority interactions.
- They are implementing cloud-based regulatory information management (RIM) systems to centralize regulatory operations, ensure timely submission tracking, and maintain consistent global product registration data.

Avasant recognizes 11 top-tier Veeva service providers supporting the digital transformation of life sciences enterprises








Note: Please refer to Avasant’s Veeva Services 2025 RadarView for a detailed analysis of the service providers and supply-side trends.

Life sciences companies are adopting cloud-based clinical platforms to centralize trial management, streamline data, and replace legacy systems, thus accelerating trial startup, enhancing collaboration, and improving compliance across teams

IT service providers support this shift by delivering cloud-based clinical platform implementation, integration, and managed services to help life sciences companies modernize R&D operations and improve trial efficiency.



Life sciences R&D use cases

				
Smith+Nephew implemented Veeva Vault eTMF to transition from manual, Excel-based processes to a unified digital platform, enhancing transparency and speeding up study timelines. This move improved audit readiness and streamlined document quality control and creation.	Boehringer Ingelheim has launched the 'One Medicine Platform' in collaboration with Veeva Systems, integrating clinical, regulatory, and quality data to streamline product development. This unified approach enhances trial efficiency and collaboration with research sites, accelerating the delivery of treatments for currently incurable diseases.	CG Oncology modernized its clinical trial management by implementing Veeva Vault CTMS, enabling a lean team to centralize planning, track performance, and streamline oversight. This reduced manual work and improved trial efficiency and data quality.	B. Braun transformed its global clinical trial management by implementing Veeva's eTMF, CTMS, and Payments solutions. This integration unified diverse processes into a single source of clinical information, enabling real-time data access, standardization, and enhanced study coordination across divisions and regions.	Jazz Pharmaceuticals adopted a hybrid model by integrating Veeva Vault eTMF and CTMS, enabling greater flexibility, improved visibility, and faster clinical trial execution. This unified approach enhanced collaboration across teams while supporting both internal and outsourced trial models.

Life sciences firms are enhancing commercial strategies by integrating digital health tools, telehealth, and AI-driven engagement to offer personalized experiences to patients and healthcare personnel

IT service providers help life sciences organizations by integrating digital tools, telehealth, AI, and real-time analytics to enable personalized engagement with patients and healthcare professionals.



ADVANZ PHARMA is standardizing its commercial operations across Europe by implementing Veeva Commercial Cloud, aiming to enhance field engagement with healthcare professionals (HCPs) and streamline its expansion into new markets.

CSL Behring

CSL Behring leverages the ON24 platform to enhance digital engagement with HCPs, gaining valuable insights into content interactions and attracting new potential customers. By integrating with Veeva CRM, the platform enables real-time data capture, optimizing follow-up strategies and strengthening HCP relationships across 40 countries.



ANI Pharmaceuticals adopted Veeva Commercial Cloud to enhance its support for rare disease patients, enabling agile, data-driven, and efficient operations. Leveraging Veeva's unified platform, ANI launched its FDA-approved Purified Cortrophin® Gel in just 75 days, streamlining processes and accelerating time-to-market for critical therapies.



Bayer has globally committed to implementing Veeva Vault CRM and Veeva OpenData, aiming to harmonize customer data and enhance engagement across regions and therapeutic areas. This strategic move positions Bayer to leverage AI-driven engagement and streamline commercial operations worldwide.



Boehringer Ingelheim has selected Veeva Vault CRM as its commercial foundation to streamline processes, enhance customer experiences, and accelerate product launches. This transition aims to unify data across Veeva Commercial Cloud, supporting the company's goal of delivering up to 25 new treatments by 2030.



Sanofi has enhanced its omnichannel marketing by integrating Veeva Crossix, enabling unified data analysis across HCP and direct-to-consumer campaigns. This integration facilitates coordinated strategies, leading to improved engagement and optimized marketing efforts.

Enterprises are using automation and cloud-based systems to improve quality and safety monitoring and enable real-time decision-making

IT service providers are helping life sciences implement cloud QMS, automate processes, and integrate data for real-time, compliant, and efficient quality and safety management.



LTS LOHMANN Therapie-Systeme AG has partnered with Veeva MedTech to implement Veeva Vault QMS, aiming to unify and enhance its global quality management processes. This collaboration will improve process control, increase audit readiness, and ensure compliance across LTS's international production sites.



Sanofi partnered with Veeva Systems to modernize its quality management processes by implementing Veeva Vault QMS and Vault QualityDocs. This initiative aims to standardize quality management across all divisions and sites on a modern cloud platform, supporting Sanofi's digital transformation efforts.



Recipharm has harmonized its quality operations across multiple sites by implementing Veeva Vault Quality applications. This integration of Vault QMS, Vault QualityDocs, and Vault Training aims to standardize quality processes, enhance GxP documentation management, and improve inspection readiness.



LEO Pharma has implemented Veeva Vault Safety to enhance its safety operations. This solution enables seamless integration of affiliates into safety workflows, providing real-time visibility into adverse events and improving data transparency across global pharmacovigilance teams.



Biomapas adopted Veeva Safety to streamline drug safety operations, enabling real-time access to safety data for internal teams and clients. This cloud-based platform enhances collaboration, improves case processing, and ensures regulatory compliance in pharmacovigilance.

Life sciences companies are using cloud-based RIM systems to centralize regulatory operations, ensure compliance, and streamline submissions through consistent data management and efficient collaboration

IT service providers help life sciences companies adopt cloud-based RIM systems by managing implementation, data migration, integration, validation, and ongoing regulatory support.

DNAexus®

DNAexus is expanding its collaboration with Veeva to integrate Veeva RIM with DNAexus Trusted Regulatory Spaces (TRS), creating a secure, cloud-based platform for global regulatory collaboration. This will streamline submission processes and enhance compliance across jurisdictions.

HUTCHMED

HUTCHMED transitioned its regulatory submissions from a fragmented, outsourced model to an in-house system using Veeva Submissions Publishing. This shift enabled continuous publishing, improved efficiency, and enhanced control over submission processes, allowing the company to manage multiple submissions simultaneously and identify issues earlier in the workflow.

sobi

Sobi adopted Veeva Vault RIM to modernize its regulatory operations and support global growth. The platform streamlined processes, reduced manual work, and ensured readiness for evolving compliance needs such as IDMP and eCTD 4.0.

SERVIER moved by you

Servier is adopting Veeva Vault RIM to unify its global regulatory data, documents, and processes. This initiative aims to streamline operations, enhance regulatory oversight, and accelerate patient access to new medicines by improving submission timelines and cross-functional collaboration.

Mersana THERAPEUTICS

Mersana streamlined its regulatory operations by adopting Veeva RIM, consolidating all regulatory information into a single, validated source of truth. This integration reduced risk, improved workflow timelines, and enhanced cross-organizational quality control processes.



AVASANT

Cognizant profile

Cognizant: RadarView profile



- Practice maturity ★★★★★
- Partner ecosystem ★★★★★
- Investments & innovation ★★★★★

Fosters agility in Veeva through certified professionals, AI solutions, and strategic partnerships, ensuring smooth implementations and optimized results.

Practice overview		Client case studies			
<ul style="list-style-type: none">Practice size: 875+ Veeva professionalsCertified/Trained resources: 600+ Veeva-certified professionalsActive clients: 50+Delivery highlights: N/A		<ul style="list-style-type: none">Delivered a unified technology ecosystem for a German pharmaceutical company by replacing over 20 legacy systems with Veeva Development Cloud. This streamlined medicinal development processes and enhanced collaboration across clinical, regulatory, and quality functions.Provided Veeva Vault support, maintenance, and governance to a French pharma company. Cognizant managed business enhancement releases, product updates, and operational change management to drive continuous improvement. It also implemented a product-oriented delivery factory model for release management, transitioning to a full DevOps approach by 2025.Migrated a US pharma company's legacy systems, onboarding 80 global sites into Vault QualityDocs. Cognizant optimized API integration, assessed risks, planned migration, and ensured GxP compliance.			
<div><div>>\$50M Revenue from Veeva services, FY 2024</div><div>>10% Veeva revenue growth rate in FY 2024</div></div>					
Key IP and assets		Key partnerships		Veeva services coverage	
<ul style="list-style-type: none">Cognizant RapidPro®: A Veeva Vault-certified solution for seamless enterprise migrations across clinical, regulatory, quality, and safety modulesVeeva CloneProd: A solution that automates the cloning of objects and documents from production to sandbox environments for testing, impact assessments, and data remediationVeeva Vault Extraction Tool: A solution that enables bulk document and metadata downloads for site divestiture, acquisition, and demerger		<div><div> </div><div> </div></div>		<div>Strategy and consulting</div> <div>Discovery and planning</div> <div>Configuration and customization</div> <div>Data migration</div> <div>Integration</div> <div>Testing</div> <div>Training and change management</div> <div>Go-live</div> <div>Post-implementation support</div>	
		Sample clients		Veeva stack coverage	
		<ul style="list-style-type: none">A Germany-based pharmaceutical companyA France-based pharmaceutical companyA US-based pharmaceutical company		<div>Clinical</div> <div>Regulatory</div> <div>Quality</div> <div>Safety</div> <div>Customer engagement</div> <div>Medical affairs</div> <div>Data</div>	

Darker color indicates higher industry coverage through digital services

Cognizant: RadarView profile

Analyst insights

Practice maturity



- Cognizant's Veeva CoE comprises over 600 certified professionals, including more than 350 Vault-certified, 150 CRM-certified, and 100 module-specific Veeva-certified experts, with 60-70 new certifications added annually. This ensures deep expertise across Veeva R&D and Commercial Cloud services, spanning implementation, migration, integration, and managed support.
- It drives automation within the Veeva ecosystem through innovative solutions that enhance operational efficiency. Its RapidPro toolset simplifies complex Veeva Vault migrations, while Veeva CloneProd and the Vault Extraction Tool optimize data movement. Additionally, its Smart Discovery solution reduces discovery time by 70%, and the Vault Report Migrator automates CRM report transfers, cutting manual efforts by 30%-50%.
- It prioritizes the development of AI solutions through initiatives such as Veeva Copilot, enabling cognitive automation for faster decision-making and streamlined operations. It introduced AI-powered mapping and automated study data tabulation model (SDTM) dataset creation, enhancing efficiency and cost savings. Additionally, its generative AI validation for Veeva Electronic Data Capture (EDC) automates study design, improving accuracy and accelerating study builds.

Partner ecosystem



- Cognizant is a Premier Services Partner for Commercial Cloud, assisting life sciences organizations in enhancing customer engagement, implementing omnichannel marketing strategies, and making data-driven decisions. Additionally, as a Veeva-certified Preferred Services Partner for Development Cloud, Cognizant demonstrates its expertise in optimizing and implementing Veeva solutions across clinical, regulatory, and quality domains.
- Cognizant is enhancing its partner ecosystem by strengthening collaborations with technology partners such as Yseop to codevelop generative AI-powered insights and compliance tools. This improves its ability to deliver AI-driven solutions and facilitate regulatory automation and streamlined Veeva implementations.

Investments and innovation



- Cognizant is focusing on strategic acquisitions of regional implementers and local partners to expand its presence in emerging markets such as LATAM and APAC. This approach aims to accelerate growth, improve managed services, and increase market share in these high-potential regions.
- It focuses on developing human capital to ensure that its workforce remains skilled in the latest Veeva technologies. It prioritizes certifications in the Vault Platform and offers training in validation modules. Over 300 associates have participated in structured learning programs. It also has an internal Java training framework that supports Vault CRM.



Appendix: About RadarView

The Veeva Services 2025 RadarView assesses providers across three critical dimensions

Practice maturity

- This dimension evaluates the type, market acceptance, and quality of offerings in the Veeva services space. It also assesses the strength of the overall practice with respect to its size, certified employees, embedded expertise in emerging technologies, and value chain coverage.
- The width and depth of the client base, practice revenues, the use of proprietary/outsourced tools and platforms, and future strategy are important factors that contribute to this dimension.

Partner ecosystem

- This dimension assesses the nature of the provider's partnerships and ecosystem engagement. It evaluates the partnership objectives (codevelopment or co-innovation) and the provider's engagement with technology solutions or product vendors, startup communities, and domain associations.
- The kind of joint development programs around offerings, go-to-market approaches, the overall depth of partnerships, and their ability to deliver superior value to clients are this dimension's important aspects.

Investments and innovation

- This dimension measures the strategic direction of investments and resultant innovations in the offerings and commercial model and how these align with the future direction of the industry.
- The overall strategic investments, both organic and inorganic, in capability and growth, technology development, and human capital development, along with the innovations that the service provider develops, are critical aspects of this dimension.

Research methodology and coverage

Avasant has based its analysis on several sources:

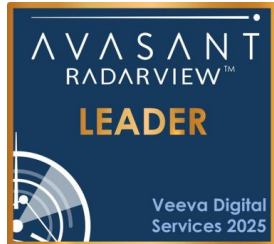
Public disclosures	Publicly available information from sources such as Securities and Exchange Commission filings, annual reports, quarterly earnings calls, and executive interviews and statements
Market interactions	Discussions with enterprise executives leading digital initiatives and influencing service provider selection and engagement
Provider inputs	Inputs collected through the service provider capability decks and structured briefings from February 2025 to April 2025

Of the 63 service providers assessed, the following are the final 11 featured in the Veeva Services 2025 RadarView:



RadarView Classifications

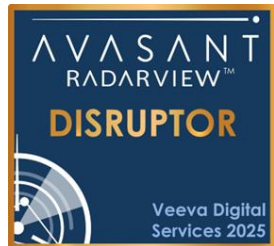
Avasant has recognized service providers in four classifications:



Leaders show consistent excellence across all key dimensions of the RadarView assessment (practice maturity, partner ecosystem, and investments and innovation) and have had a superior impact on the market as a whole. These service providers have shown true creativity and innovation and have established trends and best practices for the industry. They have proven their commitment to the industry and are recognized as thought leaders, setting the standard for the rest of the industry to follow. Leaders display a superior quality of execution and a reliable depth and breadth across verticals.



Innovators show a penchant for reinventing concepts and avenues, changing the very nature of how things are done from the ground up. Unlike leaders, innovators have chosen to dominate in a few select areas or industries and distinguish themselves through superior innovation. These radicals are always hungry to create pioneering advancements in the industry and are actively sought after as trailblazers, redefining the rules of the game.



Disruptors enjoy inverting established norms and developing novel approaches that invigorate the industry. These service providers choose to have a razor-sharp focus on a few specific areas and address those at a high level of granularity and commitment, which results in tectonic shifts. While disruptors might not have the consistent depth and breadth across many verticals like leaders or the innovation capabilities of innovators, they exhibit superior capabilities in their areas of focus.



Challengers strive to break the mold and develop groundbreaking techniques, technologies, and methodologies on their way to establishing a unique position. While they may not have the scale of the service providers in other categories, challengers are eager and nimble and use their high speed of execution to great effect as they scale heights in the industry. Challengers have a track record of delivering quality projects for their most demanding Global 2000 clients. In select areas and industries, challengers might have capabilities that match or exceed those of the providers in other categories.

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