



# Everest Group Veeva Services PEAK Matrix® Assessment 2025

Focus on TCS

August 2025



# Introduction

As life sciences enterprises continue to reimagine how they engage with patients, providers, and regulators, Veeva has emerged as a critical enabler of digital transformation across the value chain. Its modular cloud architecture, spanning clinical, regulatory, quality, safety, and commercial functions, is becoming central to how enterprises modernize business processes, unify data, and scale compliant operations globally. In particular, multi-cloud rollouts and transitions to vault-based platforms are accelerating the demand for specialized services in implementation, migration, validation, integration, and long-term managed services. Enterprises are also placing greater emphasis on partners that can deliver Good Practices (GxP)-aligned automation, domain-specific IP, and AI-enabled productivity enhancements, especially as they prepare for broader gen AI adoption and vault modernization. To support this evolution, service providers are doubling down on Veeva-specific capabilities: building accelerators, training certified resources, launching Centers of Excellence (CoEs), and driving innovation across regulated content, data flows, and engagement processes. This expansion is occurring in parallel with broader changes in biopharma Research and Development (R&D) and commercial models, increasing the strategic relevance of

Veeva as a unified platform. In this research, we present an assessment of 35 service providers featured on the [Veeva Services PEAK Matrix® Assessment 2025](#). The assessment is based on Everest Group's annual Request for Information (RFI) process for calendar year 2025, interactions with leading Veeva service providers, client reference checks, and ongoing analysis of the Veeva services market.

**The full report includes profiles of the following 35 service providers featured on the Veeva Services PEAK Matrix:**

- **Leaders:** Accenture, Cognizant, Conexus Solutions Inc., Infosys, NNIT, TCS, and USDM Life Sciences
- **Major Contenders:** Aqurance, Canopy Life Sciences, Capgemini, DAQUMA, Daelight Solutions, Deloitte, Epista Life Science, FocalCXM, Genpact, HCLTech, Indegene, IZERTIS, Jeev Lifeworks, Just in Time GCP, Prana Life Sciences, Prudentia Group, PwC, Slipstream, Spotline, Sycor, Tech Mahindra, BridgeView Life Sciences, and ZS
- **Aspirants:** CELITO TECH, MAIN5, PharmaLex, Pinnaxis, and Trueson

## Scope of this report

**Geography:** global

**Industry:** life sciences (biopharma, medical devices, and others)

**Services:** Veeva services

# Scope of research | Veeva Services PEAK Matrix® Assessment 2025

This assessment includes professional and management services around the entire suite of Veeva life sciences offerings.

<b>Veeva development cloud</b>	Clinical data management and ops Vault Clinical Suite	Regulatory Vault Regulatory Information Management (RIM) Suite	Quality Vault Quality Suite	Safety Vault Safety Suite
<b>Veeva medical cloud</b>	Medical CRM Veeva Medical Customer Relationship Management (CRM)	Scientific content management Vault MedComms	Inquiry management Vault MedInquiry	Key Opinion Leader (KOL) data and insights Veeva Link Suite
<b>Veeva commercial cloud</b>	Data management Veeva Network Veeva OpenData Veeva Compass	Customer engagement Veeva Vault CRM Veeva Align Vault Events Management	Analytics Veeva Nitro Veeva Crossix	Content management Veeva Vault PromoMats

Consulting and advisory



Custom app development



Implementation and integration



Maintenance and support

# Veeva Services PEAK Matrix® characteristics

## Leaders

Accenture, Cognizant, Conexus Solutions Inc., Infosys, NNIT, TCS, and USDM Life Sciences

- Leaders demonstrate end-to-end delivery strength in one or both Veeva clouds – development and commercial – combining scale, certified talent, and multi-Vault ownership
- Most hold Premier Tier recognition in one or both clouds and have developed platform-aligned accelerators for implementation, migration, and validation
- They are preferred by large pharma for their ability to manage complex global rollouts with cross-functional coverage and scalable managed services models
- Leaders also invest in CoEs, proprietary tools, and validation frameworks, with early traction in Vault CRM, Software Development Kit (SDK) migration automation, and GxP compliance innovation

## Major Contenders

Aqurance, BridgeView Life Sciences, Canopy Life Sciences, Capgemini, DAQUMA, Daelight Solutions, Deloitte, Epista Life Science, FocalCXM, Genpact, HCLTech, Indegene, IZERTIS, Jeev Lifeworks, Just in Time GCP, Prana Life Sciences, Prudentia Group, PwC, Slipstream, Spotline, Sycor, Tech Mahindra, and ZS

- Major Contenders show meaningful capability in specific Vault modules such as migration, validation, and commercial managed services, but are still maturing in scale or cross-cloud execution
- Major Contenders have focused delivery footprints, often centered on limited modules, and are actively building proprietary tools and repeatable implementation frameworks
- While some have demonstrated innovation in specific modules, such as regulatory or safety, they generally lack the scale, consulting maturity, or full-suite execution seen in Leaders

## Aspirants

CELITO TECH, MAIN5, PharmaLex, Pinnaxis, and Trueson

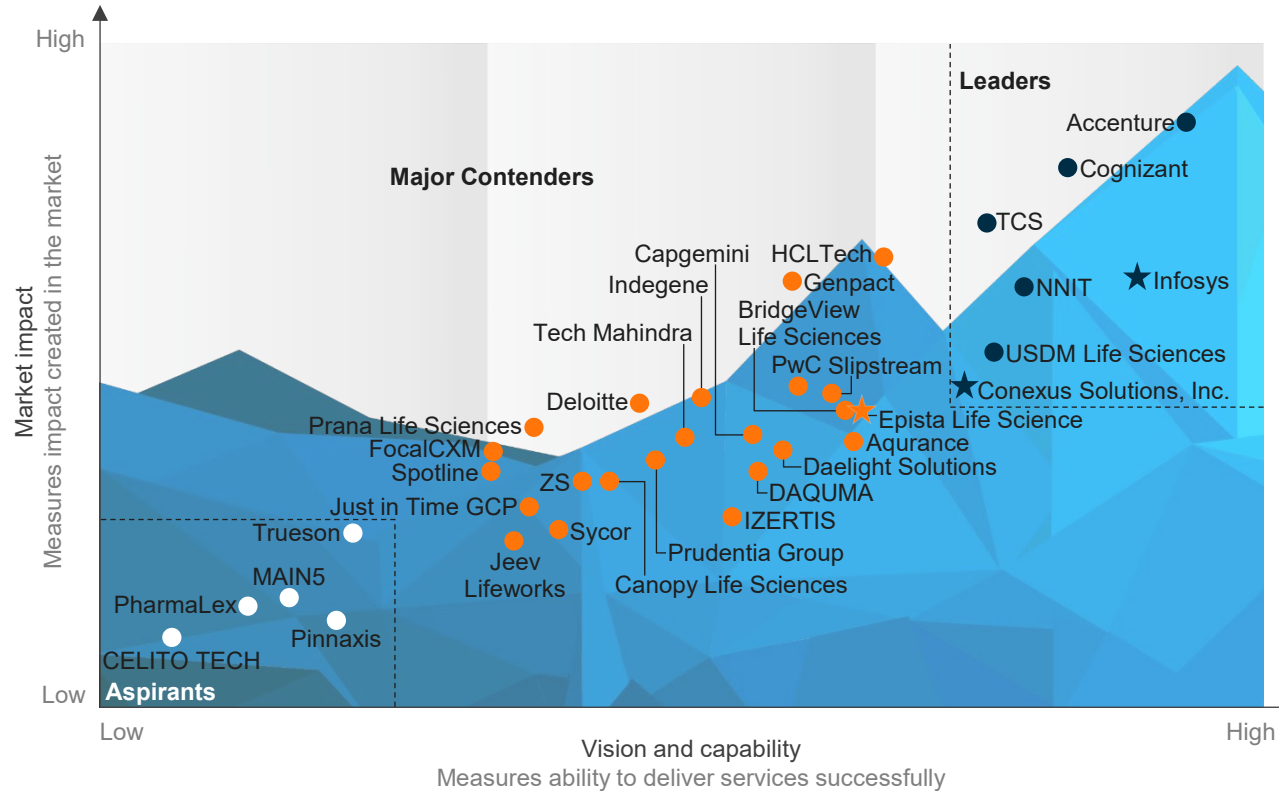
- Aspirants typically focus on targeted Vault capabilities or regional delivery, supporting small to midsize clients with CRM or safety-focused use cases
- While they offer implementation and support experience, they lack formal certifications, broad client validation, or scale across multiple Vault modules
- Their progression toward higher maturity will depend on strategic IP development, expanded FTE pools, and increased visibility in enterprise-grade transformation programs

# Everest Group PEAK Matrix®

Veeva Services PEAK Matrix® Assessment 2025 | TCS is positioned as a Leader

## Everest Group Veeva Services PEAK Matrix® Assessment 2025<sup>1</sup>

- Leaders
- Major Contenders
- Aspirants
- ☆ Star Performers



<sup>1</sup> Assessments for Canopy Life Sciences, Capgemini, CELITO TECH, Daelight Solutions, Deloitte, Epista Life Science, IZERTIS, Jeev Lifeworks, Just in Time GCP, MAIN5, PharmaLex, Pinnaxis, Prudential Group, PwC, Slipstream, Spotline, Sycor, Trueson, USDM Life Sciences, and ZS exclude provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with insurance buyers  
Source: Everest Group (2025)










# TCS

## Everest Group assessment – Leader

Measure of capability:  Low  High

### Market impact

### Vision and capability

Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
								

### Strengths

- TCS is designated as a Veeva preferred services partner for commercial and development cloud, signaling trusted delivery standards and alignment with Veeva best practices
- It offers one of the most extensive portfolios of custom solutions and accelerators, designed to shorten implementation timelines, simplify data migration challenges, and support clients through operational tasks
- Clients highlight TCS’ robust application-management practice that efficiently supports full release processes and ongoing monitoring
- TCS’ certified talent pool spans CRM, vault, and network, with practical deployment across clinical, quality, and commercial use cases, backed by both administrator- and associate-level credentials
- Clients highlight TCS for its strong client management capabilities, marked by proactive communication

### Limitations

- While it has good functional strength across regulatory and IT service management, exposure in strategic advisory and custom application development remains relatively low compared to peers
- While clients recognize TCS’ responsiveness, resource churn and short-notice movements have raised concerns around continuity and domain expertise
- While TCS has a sizable delivery footprint, it needs to improve user-facing engagement particularly among business analysts where communication gaps have led to delays in understanding and responsiveness
- Clients observe that, while pricing is competitive, delivery timelines tend to stretch longer than expected, reducing perceived value in DevOps engagements

## Market trends

Veeva services market sees strong growth amid rising demand for platform-wide delivery, automation, and outcome-driven engagement

### Market size and growth

Everest Group estimates the global Veeva services market to be ~US\$1.8 billion in 2025, driven by CRM migrations, cross-cloud transformations, and outcome-linked AMS growth

Everest Group estimates a 10-15% growth rate for the global Veeva services market in 2025, fueled by CRM migration demand, platform-scale delivery, and rising adoption of automation-led AMS models.

### Key drivers for Veeva services

**CRM migration at scale** The Veeva-Salesforce split is triggering large-scale CRM transitions. Demand is high for providers offering toolkits, dual-stack governance, and advisory on “what to retain vs. rebuild.”

**Cross-Vault, platform-based delivery** Enterprises are consolidating multiple Vault modules such as RIM, QMS, eTMF, and safety into unified programs. Service needs are shifting from single-module setups to interoperable, cross-cloud delivery models.

**Consulting-led service models** Enterprises want more than implementation – they seek business process redesign, user adoption strategy, and platform-value advisory. Providers who bring consulting plus execution are pulling ahead.

**Embedded AI and automation** Clients expect providers to deliver faster releases, smarter compliance, and better content reuse – not just configuration. Providers who offer baked-in gen AI and automation accelerators are winning on cost, time, and innovation

### Challenges

**Veeva badges alone do not win deals anymore** Premier or Preferred Veeva partner status no longer guarantees selection. Clients now prioritize demonstrated IP maturity, proactive road-mapping support, stable and specialized teams

**Maturity gaps in gen AI delivery** While many talk about gen AI, only a few providers deliver scalable, productized use cases with buyers raising the bar – expecting gen AI to be part of standard delivery, not a demo

**Pressure to own outcomes** AMS contracts are shifting from Time and Material (T&M) to Key Performance Indicator (KPI)-linked delivery. Providers must now track business metrics such as Vault release velocity, CR backlog reduction, and system adoption.

**Competing with scaled integrators** Specialists are now being compared to global SIs in complex rollouts. Providers must either scale up selectively or position clearly around where they add non-replicable value (e.g., niche accelerators, domain-led delivery).

# Provider landscape analysis

Accenture, Cognizant, and TCS lead overall market share, while emerging providers show the fastest YoY growth in Veeva services

## Provider market share analysis

2025; percentage of overall market of Veeva services



## Provider market share by YoY growth

2023-24; increase in percentage of Veeva services revenue



Note: Providers are listed alphabetically within each range

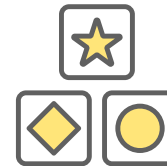
# Key takeaways for buyers

Buyers are prioritizing partners with deep functional expertise, cross-cloud delivery maturity, and the ability to drive value through automation, IP, and compliance-led transformation. As Veeva adoption matures, enterprise focus is shifting toward integrated Vault strategies, lifecycle enablement, and long-term support models across R&D and commercial domains.



## Shifts in provider capabilities

Multi-Vault rollouts, regulatory-aligned migration tools, and AMS maturity are becoming key criteria for sourcing globally scalable Veeva services



## Differentiation across provider types

Specialist firms excel in areas such as validation, safety, study build, PromoMats, and CRM; generalists offer scale and breadth for multi-Vault enterprise programs



## Key innovations

Buyers now expect built-in accelerators such as automated validation, content orchestration, and gen AI copilots to improve service lifecycle efficiency

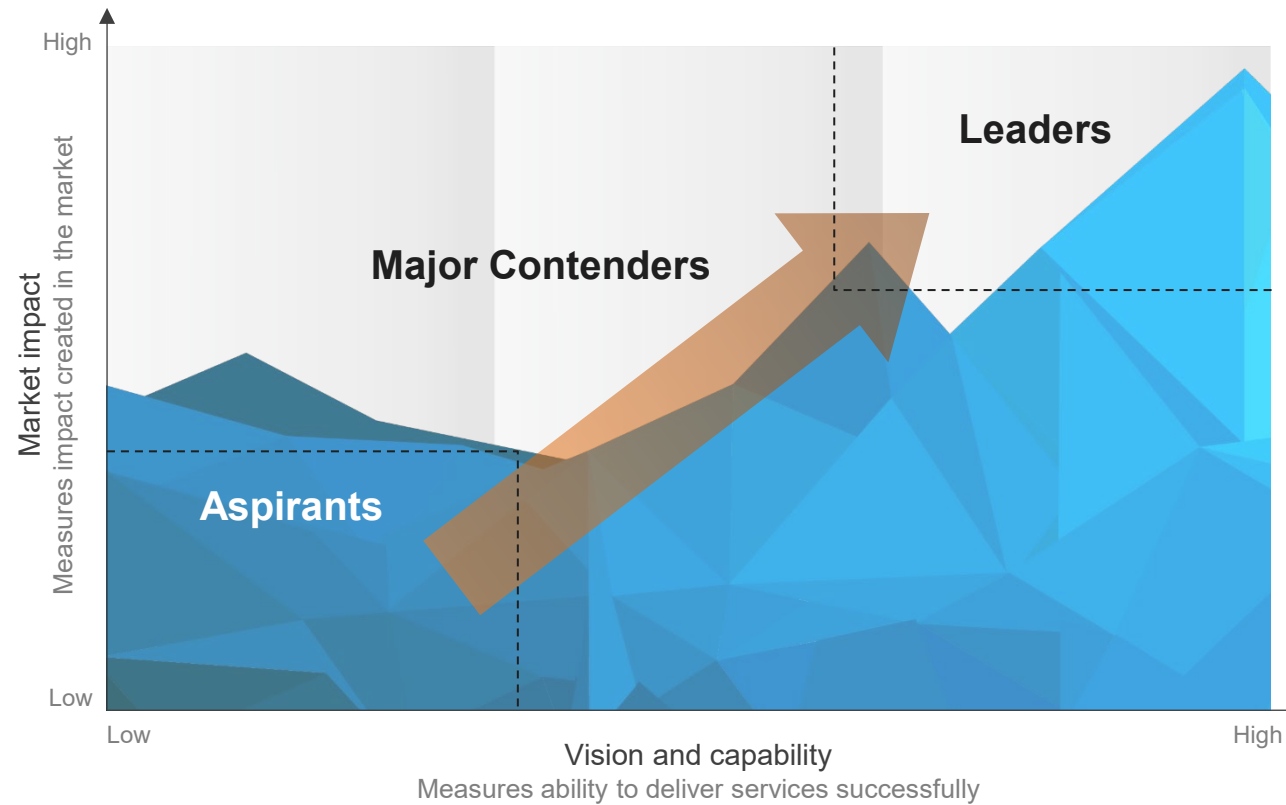
# Appendix

PEAK Matrix® framework

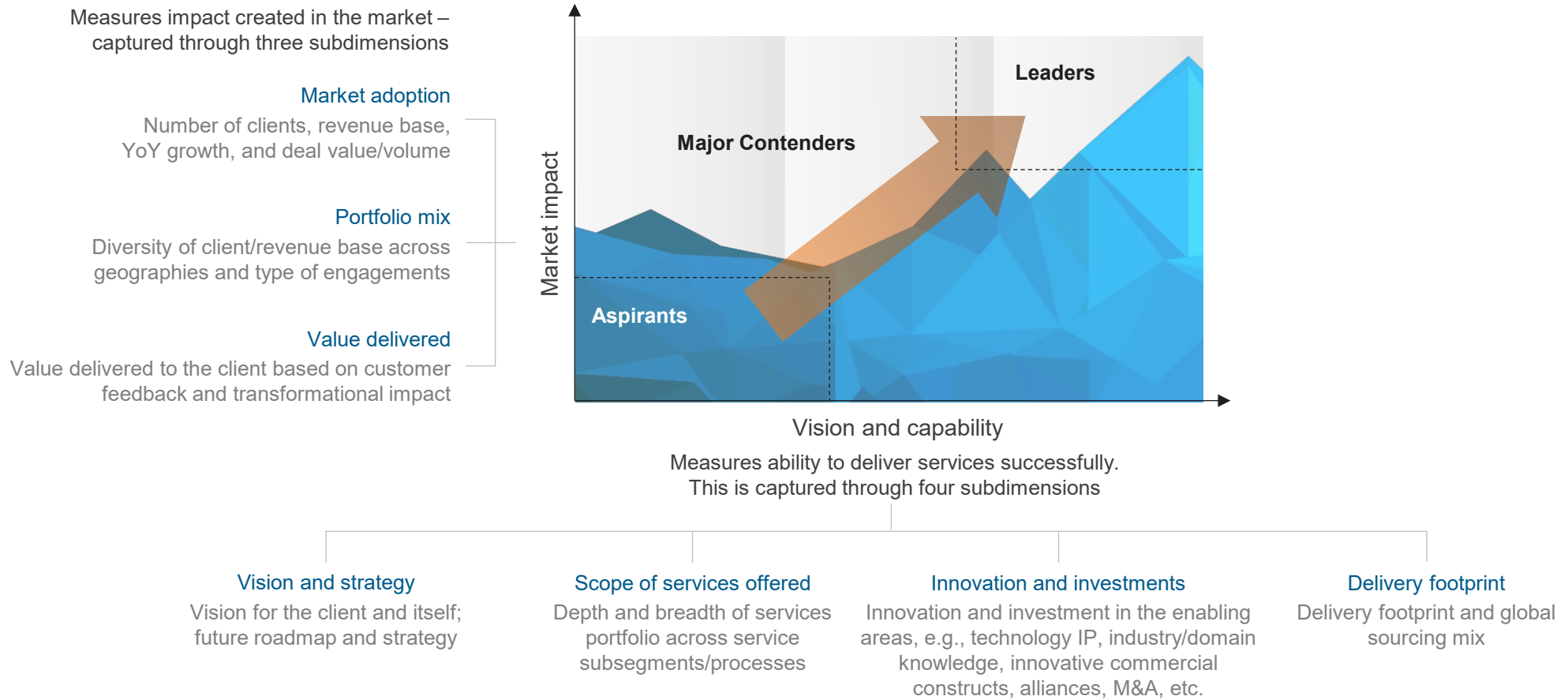
FAQs

# Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision and capability

Everest Group PEAK Matrix



# Services PEAK Matrix® evaluation dimensions



## FAQs

**Q: Does the PEAK Matrix® assessment incorporate any subjective criteria?**

**A:** Everest Group's PEAK Matrix assessment takes an unbiased and fact-based approach that leverages provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information. In addition, we validate/fine-tune these results based on our market experience, buyer interaction, and provider/vendor briefings.

**Q: Is being a Major Contender or Aspirant on the PEAK Matrix, an unfavorable outcome?**

**A:** No. The PEAK Matrix highlights and positions only the best-in-class providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition.

**Q: What other aspects of the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?**

**A:** A PEAK Matrix positioning is only one aspect of Everest Group's overall assessment. In addition to assigning a Leader, Major Contender, or Aspirant label, Everest Group highlights the distinctive capabilities and unique attributes of all the providers assessed on the PEAK Matrix. The detailed metric-level assessment and associated commentary are helpful for buyers in selecting providers/vendors for their specific requirements. They also help providers/vendors demonstrate their strengths in specific areas.

**Q: What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?**

**A:** Enterprise participants receive summary of key findings from the PEAK Matrix assessment

For providers

- The RFI process is a vital way to help us keep current on capabilities; it forms the basis for our database – without participation, it is difficult to effectively match capabilities to buyer inquiries
- In addition, it helps the provider/vendor organization gain brand visibility through being included in our research reports

**Q: What is the process for a provider / technology vendor to leverage its PEAK Matrix positioning?**

**A:** Providers/vendors can use their PEAK Matrix positioning or Star Performer rating in multiple ways including:

- Issue a press release declaring positioning; see our citation policies
- Purchase a customized PEAK Matrix profile for circulation with clients, prospects, etc. The package includes the profile as well as quotes from Everest Group analysts, which can be used in PR
- Use PEAK Matrix badges for branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)

The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with Everest Group; please contact your CD or contact us

**Q: Does the PEAK Matrix evaluation criteria change over a period of time?**

**A:** PEAK Matrix assessments are designed to serve enterprises' current and future needs. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality and to serve enterprises' future expectations.

# Stay connected

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