

Medical Affairs 2030:

Innovating the Medical Affairs
Model with New Roles,
Capabilities & Competencies

Best Practices, LLC
Medical Affairs Benchmarking Research



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BUSINESS ISSUE

The capabilities (and expectations) of Medical Affairs organizations have shifted rapidly over the last 5 years – and the organization in 2030 may look and function differently than how it appears today. These changes might take the form of new roles, technologies, organizational structure and competencies / expectations of all Medical functions.

This benchmark study examines how the current Med Affairs organization is innovating key capabilities to meet the needs of an ever-changing industry. With new technologies and roles at the forefront, Medical Affairs groups will be able to use these critical insights to continue adapting in this dynamic period. Ultimately, these benchmarks will support higher Medical impact and fulfillment of the organization’s goals in 2030.



RESEARCH METHODOLOGY

Best Practices, LLC engaged Medical Affairs leaders from 37 biopharma companies. The research team also conducted deep-dive interviews with select study participants to capture additional insights on the numerous innovations and advancements that Medical teams are undertaking for better impact over the next 5 years.

Key Questions probed in this study include:

- How do you predict the Medical Affairs function will most likely evolve over the next 5 years?
- What improvements need to be made to Medical Affairs to ensure maximum impact?
- What new technology/tools have you adopted to enhance Medical’s impact? What technology do you predict will be most important by 2030?
- What new roles (or competencies) are being developed within Medical Affairs to support your organization's changing objectives?
- How is innovation carried out throughout your organization? Do you have a standalone “innovation” group?
- How do you predict key Medical responsibilities / areas will evolve over the next 5 years?

Universe of Learning:

This study is powered by insights from 54 medical leaders from 37 biopharma companies

Medical Affairs Benchmark Study Partners

abbvie

ALEXION

arrowhead
pharmaceuticals

AstraZeneca

axsome

Alnylam

BAYER

Biogen

BIOMÉRIEUX

Boehringer
Ingelheim

Corcept
THERAPEUTICS

Daiichi-Sankyo

Eisai

EMD
SERONO

eurofarma

GRIFOLS

GUARDANT

INDIVIOR

Jazz Pharmaceuticals

Johnson&Johnson

MERCK

NOVARTIS

Opella.

ORGANON

Otsuka

SANDOZ

sanofi

Santen

Scholar
Rock

SERVIER

sobi

SPUR THERAPEUTICS

Takeda

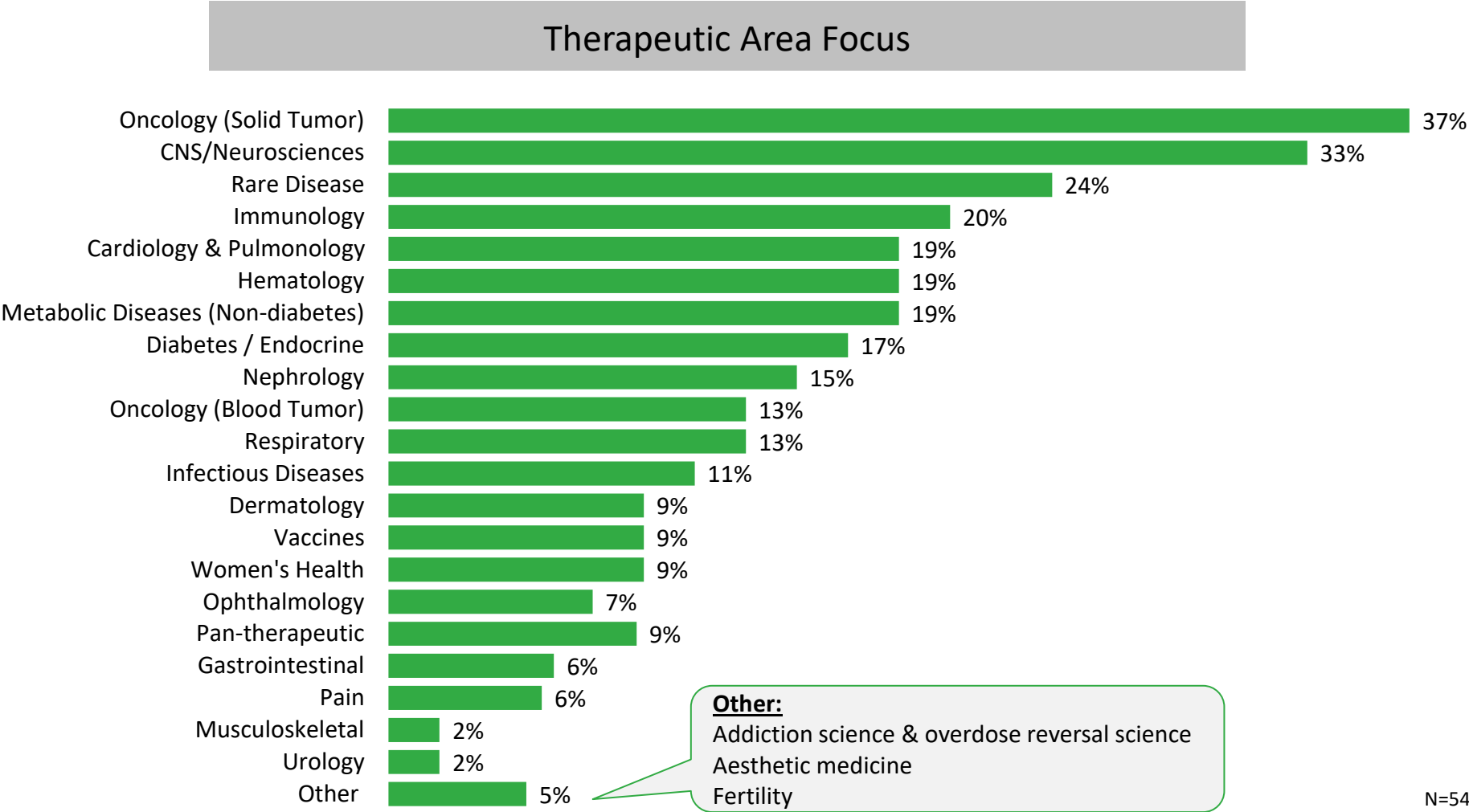
Vantive

VERASTEM
ONCOLOGY

VERTEX

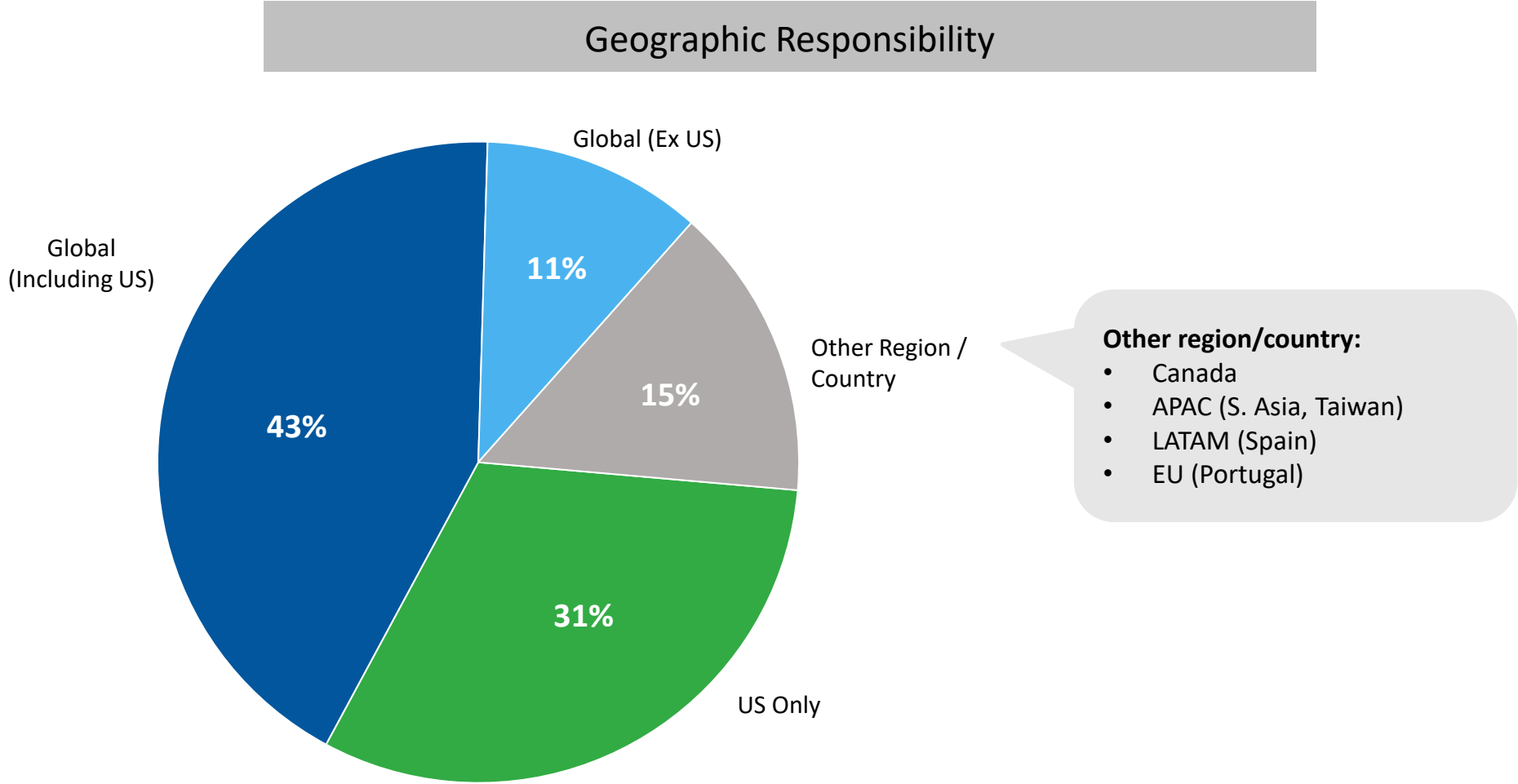
XENON

Therapeutic Areas: 1/3 of organizations focus on Oncology and CNS, with a variety of many other TAs represented throughout the report



Q. What therapeutic area(s) are you answering for today?

Geographic Responsibility: Most respondents have a US focus within Medical Affairs (74%), with over half overseeing Global activities



N=54

Q. What geographic area are you responsible for in your Medical Affairs role?

Sample Study Findings: Detailed findings are available in the full report

Medical's View of Success in 2025

- Top Medical Affairs success factors: People and Culture reign supreme as the most important factors for Medical Affairs' future success. Technology and Money/Investment are viewed as less critical for success, though they will continue to play a major role in Medical's development and ability to deliver future impact.
 - *"The people are what is going to create the success for Medical Affairs, and it's about getting the right people in the right positions"*

A 2030 Vision of Medical Affairs

- Becoming the evidence generator function: The highest number of respondents predict that the Medical function will evolve to support more evidence generation over the next 5 years (**43% of orgs**). Others predict Medical evolution toward customer service or care model expertise (**23%**). Some see Medical becoming "the KOL access function (**13%**)."
 - *"The emphasis has been on Evidence Generation with our outcomes projects, IIS' and now collaborative research"*

Predicted Changes in Medical Affairs by 2030

- Outsourcing is affected by resourcing & org structure: Of the activities which are expected to have stagnant growth, outsourcing is the most affected by resourcing (large pharma will do **45% less** than mid-sized orgs on average) and by the adoption of a standalone innovation group ("no innovation group" will outsource **28% more** on average than if an org has an innovation group).

Benchmark overview:

How well is Medical Affairs positioned for future success?

What factors exist today which will influence Medical Affairs success and innovation in 2030?

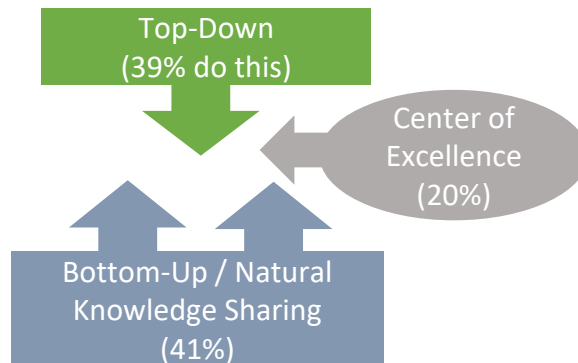
Most rank their Medical Affairs organization 4 out of 5 for ability to adopt new changes



People/Culture is still viewed as the most important factor for Medical's success



Innovation of Med Affairs is driven via different avenues within organizations

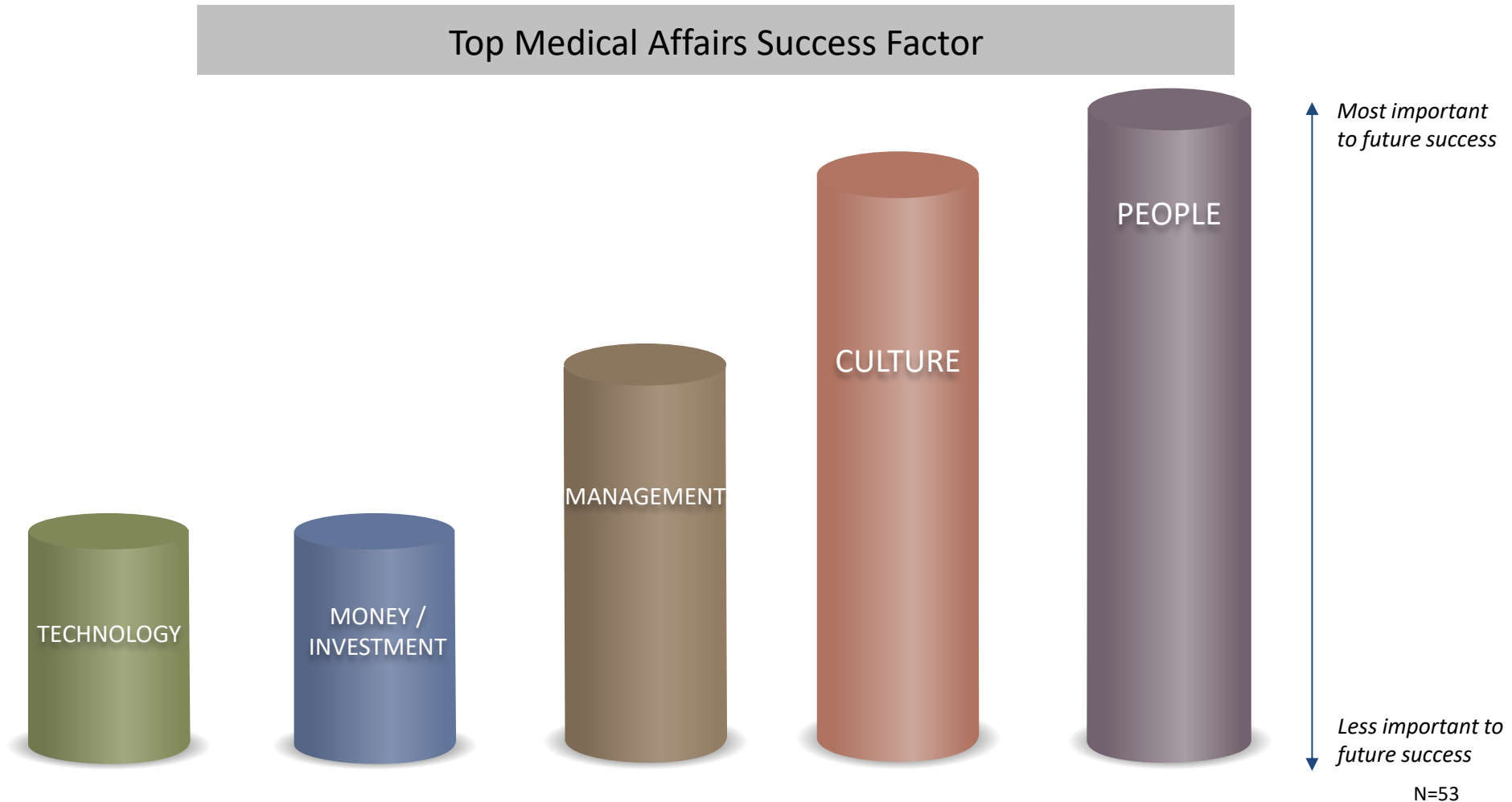


2030 Medical Affairs success will require:

- #1** Integrated MA mgmt. across org.
- #2** Efficient insight dissemination
- #3** Innovative customer engagement
- #4** Digital literacy
- #5** Cross-org data integration

Per benchmark survey and industry interviews

Top Medical Affairs Success Factors: Technology may be a large focus for Medical right now, but the people and culture are still the keys to its future success



Q. In your opinion, how important are each of the following factors in the future success of Medical Affairs?

Medical’s vision for 2030 impact: Many link Medical Affairs’ future value primarily to critical evidence generation & care model engagement activities

*% represents share of survey respondents

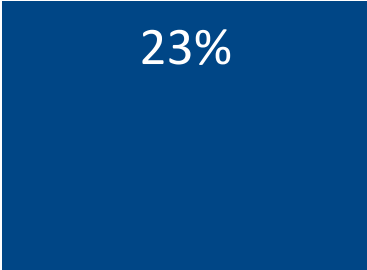
2030 Vision of Medical Affairs

“Evidence Generator”
Function



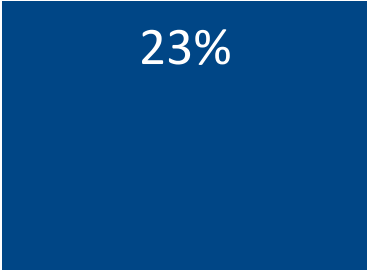
The developer, keeper and disseminator of critical scientific information in an increasingly evidence-focused market

“Customer Service”
Function



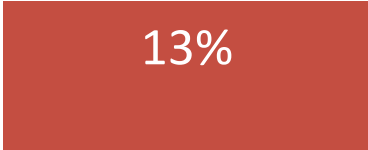
Provides problem-solving for better fulfilling clinical needs, customer/patient needs, Commercial needs, and other market needs

“Care Model”
Function



Medical is a sector-wide leader of scientific advancement and optimal clinical practice

“KOL Access”
Function



Acts as a bridge for Commercial and the key customer segments which determine success (e.g., KOLs, institutions)

N=40

Q. In which manner do you predict the Medical Affairs function will most likely evolve over the next 5 years?



Technology to compliment AI is also being adopted

Digital tools are being created/used for:

- Social media listening & digital communication
- Activity & impact tracking
- Customized KPI capture in dashboards & integrated data reporting
- Med-Legal support (Med info & insights review)
- E-labeling: access to product data directly from consumers/patients
- Better ingestion & centralization of data (data lakes)
- Specialized learning/training tools - to help with empathy, clinical burnout & meeting preparation

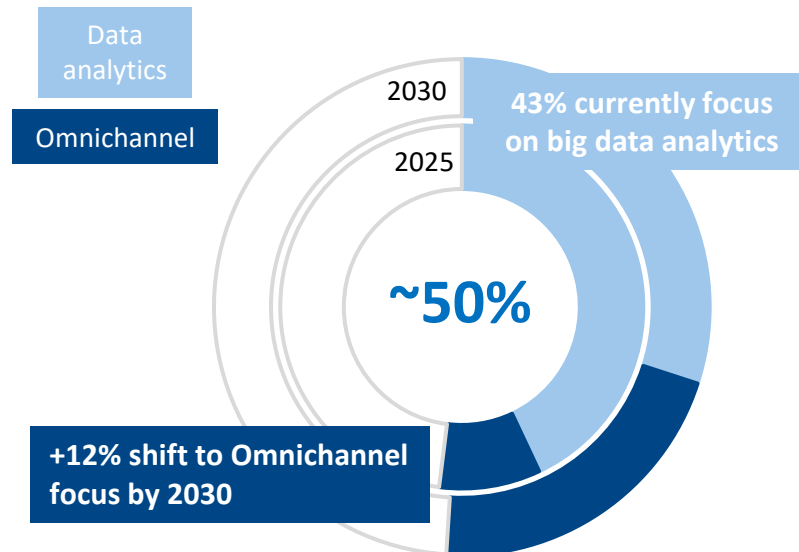
Omnichannel Initiatives

- Communication plan tailored to Medical expert profile
- Patient engagement
- Integrating genAI to understand next best action for supporting Medical strategy
- Use existing data sources as 'triggers' to predict potential customer behavior or decision making

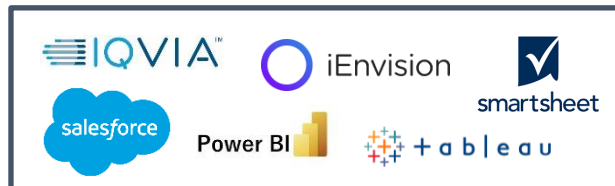
“Need insights sharing across the organization so that all members are up to date on what is being said in the field”

Responses from Best Practices' survey

Efforts currently spent on data analytics will shift to AI and more advanced omnichannel activities in 2030



Analytics tools in use:



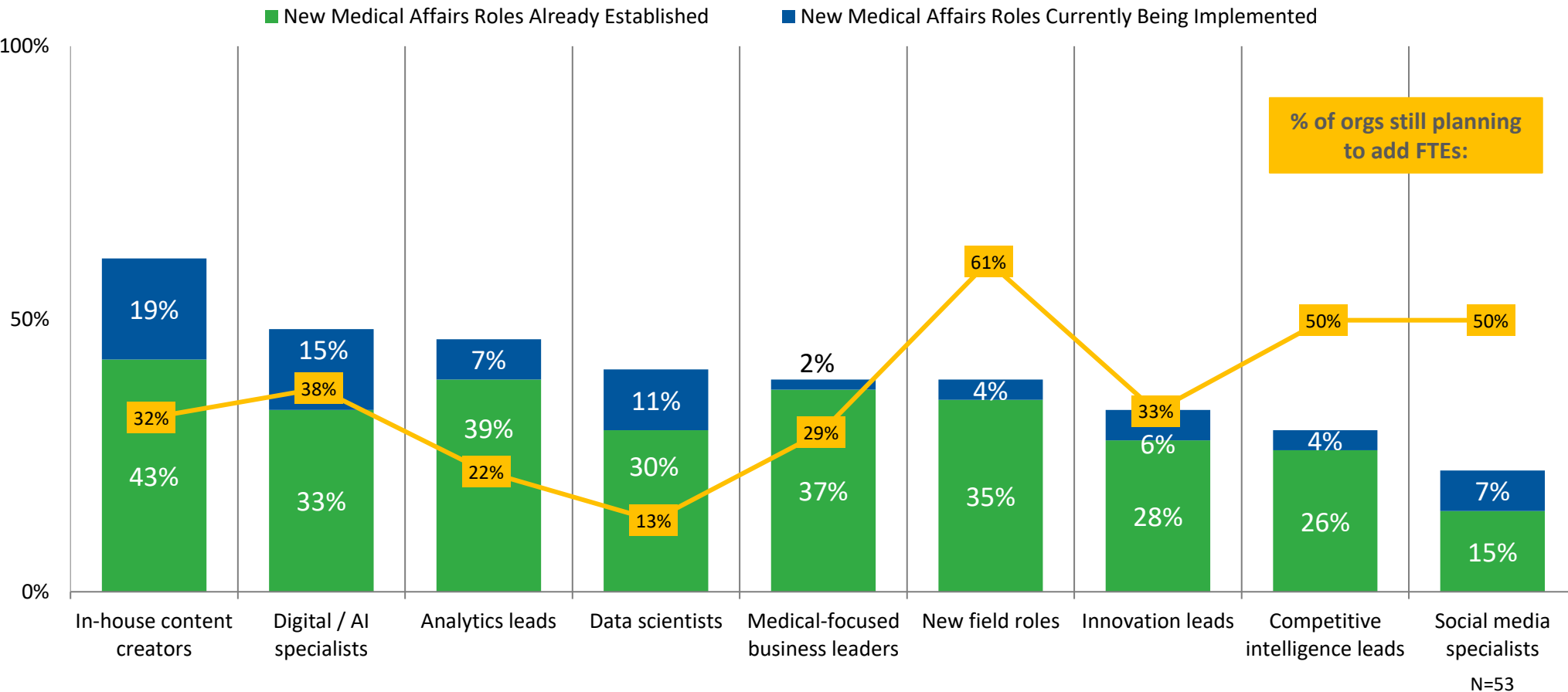
Q. What new technology, programs, systems, or tools has your Medical organization recently adopted to give you new capabilities?



Establishing new roles: The mid 2020s have seen Medical organizations add in-house content creators and many data-centric roles (analytics, digital/AI, data science)

New Roles Being Established

**Values represent the % selected by total respondents*

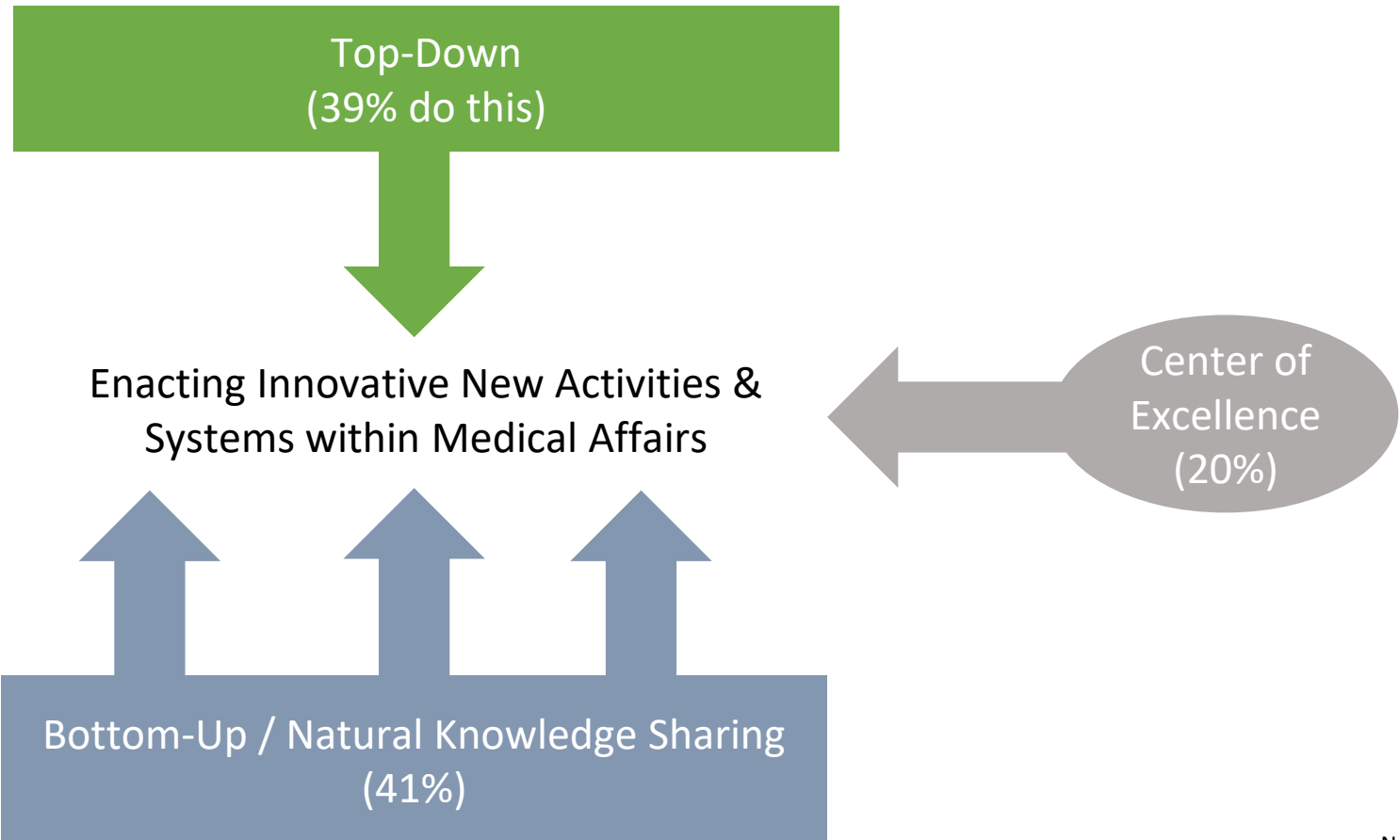


Q. What new roles (or competencies) are being developed within Medical Affairs to support your organization's changing objectives?



Drivers of Medical Affairs Innovation: The most innovative Medical Affairs organizations utilize a CoE to drive and enact change

How innovation is driven in Medical Affairs groups



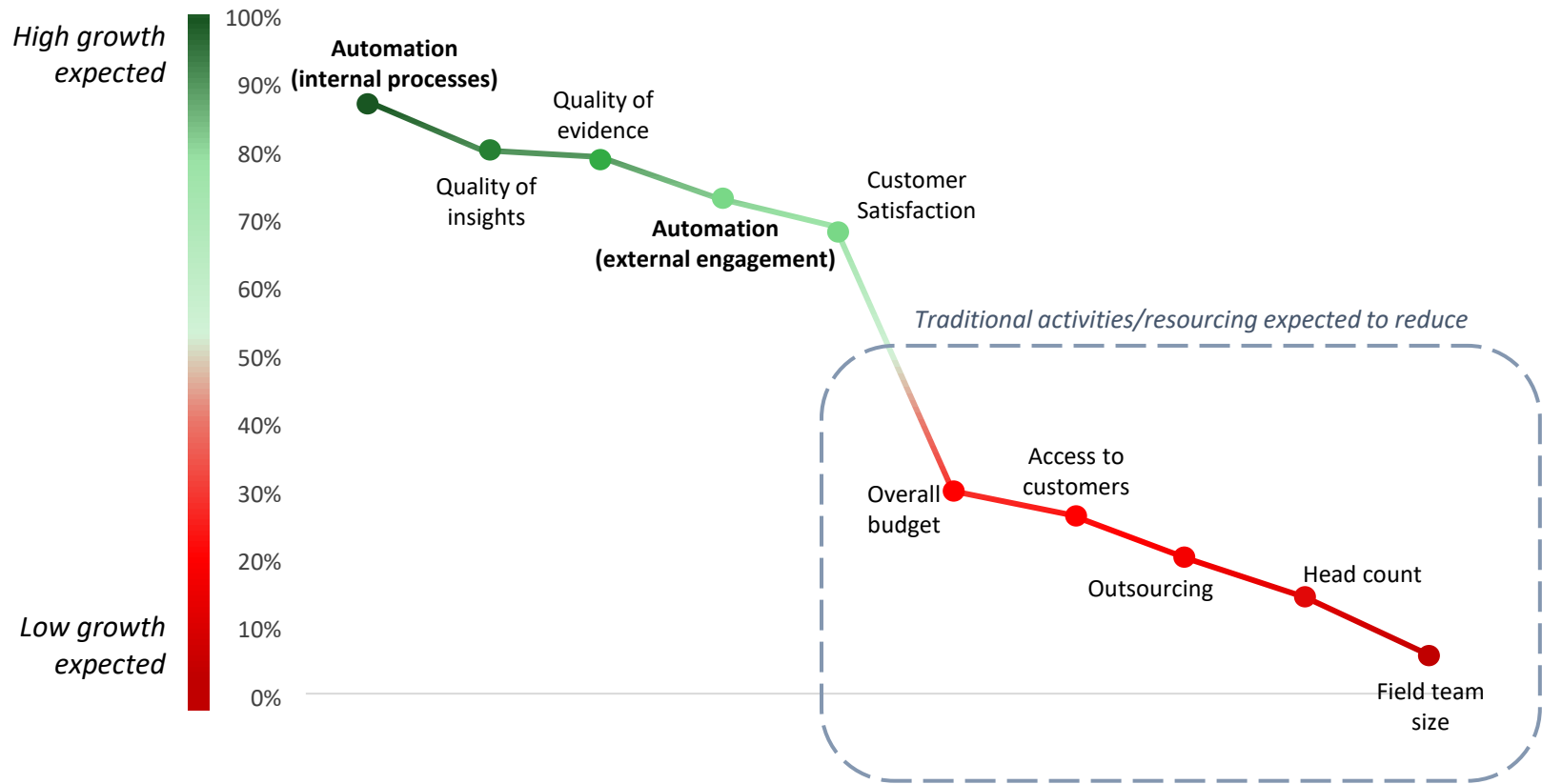
N=21

Q. At present, from which direction is Medical Affairs innovation (i.e., tools, tactics and strategies) being driven within your Medical Affairs organization?

Prioritizing Insights & Automation: New capabilities will ensure automation and insights thrive, though slower growth is expected for more “traditional” Medical activities by 2030

Predicted Changes in Key Areas by 2030

**Depicts weighted growth prediction for each Medical activity / responsibility*



N=39

Q. Compared to today, how do you predict the following key Medical responsibilities/areas will evolve over the next 5 years?



Our company is an internationally recognized thought leader in the field of best practice benchmarking. We provide research, consulting, benchmark database, publishing and advisory services to the biopharmaceutical and medical device sectors. We work closely with business intelligence groups. Our work is based on the simple yet profound principle that organizations can chart a course to superior economic performance by leveraging the best business practices, operating tactics and winning strategies of world-class companies.

Best Practices

6350 Quadrangle Drive, Suite 200, Chapel Hill, NC 27517

www.best-in-class.com

Phone: (919) 403-0251