

# Decentralized Clinical Trial Platforms PEAK Matrix® Assessment 2023 – Update

December 2023



# Contents

<b>1. Introduction and overview</b>	<b>4</b>
• Research methodology	5
• Key information on the report	6
• Introduction	7
• Focus of the research	8
<b>2. Decentralized clinical trial platform PEAK Matrix® characteristics</b>	<b>9</b>
• Summary of key messages	10
• PEAK Matrix framework	11
• Everest Group PEAK Matrix for decentralized clinical trial platforms	14
• Characteristics of Leaders, Major Contenders, and Aspirants	15
• Platform provider capability summary dashboard	18
<b>3. Enterprise sourcing considerations</b>	<b>22</b>
• Leaders	22
– Medable	23
– Medidata Solutions	24
– Science 37	25
– THREAD	26
• Major Contenders	27
– Alira Health	28
– Castor	29
– Clario	30

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# Contents

• Major Contenders (continued)	
– Clinical ink	31
– Crucial Data Solutions	32
– Datacubed Health	33
– Delve Health	34
– Fortrea	35
– IQVIA	36
– Medrio	37
– ObvioHealth	38
– Signant Health	39
– Veeva Systems	40
– Viedoc Technologies	41
• Aspirants	42
– Aparito	43
– Cliniv Health Tech	44
– Huma	45
– Jeeva	46
<b>4. Appendix</b>	<b>47</b>
Glossary	48

# 01

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## Introduction and overview

- Research methodology

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- Key information on the report

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- Introduction

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- Focus of the research

# Our research methodology is based on four pillars of strength to produce actionable and insightful research for the industry

01

## Robust definitions and frameworks

Function specific pyramid, Total Value Equation (TVE), PEAK Matrix®, and market maturity

02

## Primary sources of information

Annual contractual and operational RFIs, provider briefings and buyer interviews, web-based surveys

03

## Diverse set of market touchpoints

Ongoing interactions across key stakeholders, input from a mix of perspectives and interests, supports both data analysis and thought leadership

04

## Fact-based research

Data-driven analysis with expert perspectives, trend-analysis across market adoption, contracting, and providers

Proprietary contractual database of life sciences (ITS) (updated annually)

Year-round tracking of major life sciences IT service providers

Large repository of existing research in life sciences (ITS)

Over 30 years of experience advising clients on strategic IT, business services, engineering services, and sourcing

Executive-level relationships with buyers, providers, technology providers, and industry associations

## This report is based on two key sources of proprietary information

- Proprietary database of IT services contracts of major IT providers with workplace services in scope of work (updated annually)
- The database tracks the following elements of each contract:
  - Buyer details including size and signing region
  - Contract details including provider, contract type, TCV & ACV, provider FTEs, start & end dates, duration, and delivery locations
  - Scope details including share of individual buyer locations being served in each contract, Line of Business (LOB) served, and pricing model employed
- Proprietary database of IT providers (updated annually)
- The database tracks the following for each provider:
  - Revenue and number of FTEs
  - Number of clients
  - FTE split by different lines of business
  - Revenue split by region
  - Location and size of delivery centers
  - Technology solutions developed
- Provider briefings
  - Vision and strategy
  - Annual performance and future outlook
  - Key strengths and improvement areas
  - Emerging areas of investment
- Buyer reference interviews, ongoing buyer surveys, and interactions
  - Drivers and challenges for adopting workplace services
  - Assessment of provider performance
  - Emerging priorities
  - Lessons learnt and best practices

### Providers assessed<sup>1,2</sup>



1 Assessments for Clinical ink, Fortrea, Signant Health, Aparito, and Huma excludes platform provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, platform providers' public disclosures, and Everest Group's interactions with decentralized clinical trial platform buyers

2 Assessments for Veeva Systems is based on partial primary inputs

The source of all content is Everest Group unless otherwise specified

Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any information we collect that is contract specific will only be presented back to the industry in an aggregated fashion

## Background of the research

Decentralized Clinical Trials (DCTs) represents a modern and patient-centric approach to conducting clinical research by leveraging digital technologies to facilitate remote participation. By allowing remote participation, DCTs address common barriers such as travel constraints, leading to increased patient engagement and retention. This not only benefits the patients but also contributes to more inclusive study results and reduced investigator workload. This has spurred the adoption of advanced technologies, including eConsent, ePRO, televisits, and wearable/sensor tech, revolutionizing patient monitoring and recruitment for a streamlined and robust remote clinical trial experience.

As we transition beyond the pandemic, the clinical trial landscape is evolving toward a hybrid model. This model seamlessly integrates the technological advancements that emerged during COVID-19 with established traditional site workflows, paving the way for a new era of hybrid trials that harness the strengths of both approaches. In response to this evolving landscape, DCT platform providers are strategically concentrating on delivering comprehensive solutions. These unified platforms for end-to-end DCT conduct place significant focus on harnessing real-world evidence, seamless integration with sensors and wearables, along with tools dedicated to enhancing patient engagement and retention throughout the trial process.

In this report, we assess the capabilities of 22 platform providers specific to the decentralized clinical trial platform. These platform providers are mapped on the Everest Group PEAK Matrix®, which is a composite index of a range of distinct metrics related to a provider's capability and market impact. We focus on:

- The landscape of platform providers for DCTs
- Assessment of the DCT platform providers on several capability and market success-related dimensions

### Scope of this report



**Geography**  
Global




**Providers**  
Life sciences  
(biopharmaceuticals,  
medical devices, and  
Contract Research  
Organizations (CROs))



**Products**  
Decentralized clinical  
trial platforms

## Decentralized clinical trial platforms | scope of the research

In this report, Everest Group focuses on platforms that enable decentralized clinical trials

 Scope of assessment 2023

Mode of conduct				
Completely virtual			Hybrid (digitally-enabled trials)	
Core modules (technology products)				
Patient screening & recruitment	eConsent	eCOA & ePRO	Televisit	Remote patient monitoring
Patient engagement				
Stakeholder-specific capabilities (in-house/partnerships) [Not-exhaustive]				
<b>Patient-facing core module functionalities</b> + <b>Patient-specific supporting functionalities</b> <ul style="list-style-type: none"> <li>• Milestone manager, gamification, and rewards</li> <li>• Patient support &amp; coaching</li> <li>• Access to patient data and trial-related information</li> <li>• Patient feedback collection</li> </ul>		<b>Site-facing core module functionalities</b> + <b>Site-specific supporting functionalities</b> <ul style="list-style-type: none"> <li>• Site enablement (site activation and setup, site training and onboarding)</li> <li>• Digital gateway for logistic management, drug serialization, and traceability</li> <li>• Site network management</li> <li>• Site feedback collection</li> </ul>		<b>Sponsor-facing core module functionalities</b> + <b>Sponsor-specific supporting functionalities</b> <ul style="list-style-type: none"> <li>• Oversight management, risk-based monitoring</li> <li>• Diversity in patient population</li> <li>• Support with regulatory compliance &amp; audit readiness</li> <li>• Trial performance analysis &amp; reporting</li> </ul>
DCT platform capabilities				
Unified data platform	Collaboration workflows for all stakeholders		Enterprise-wide scalability (geography, therapeutic areas)	Data security, privacy, and compliance
Single sign-on, user-friendly UI, smooth operations, multilingual offering and support		Integration of devices and workflows with existing clinical system	Clinical data review and analysis (clinical decision-making, oversight analytics, recommendation engine, descriptive & predictive analytics, AI/ML, business intelligence, reporting)	
Enabling services (in-house/partnerships)				
Home nursing	Patient concierge	Drug and device provisioning	Payment management (site & patient payment)	DCT consulting services



# 02

## Decentralized clinical trial platforms PEAK Matrix® characteristics

- Summary of key messages
- PEAK Matrix framework
- Everest Group PEAK Matrix for decentralized clinical trial platforms
- Platform provider capability summary dashboard
- Characteristics of Leaders, Major Contenders, and Aspirants

## Summary of key messages

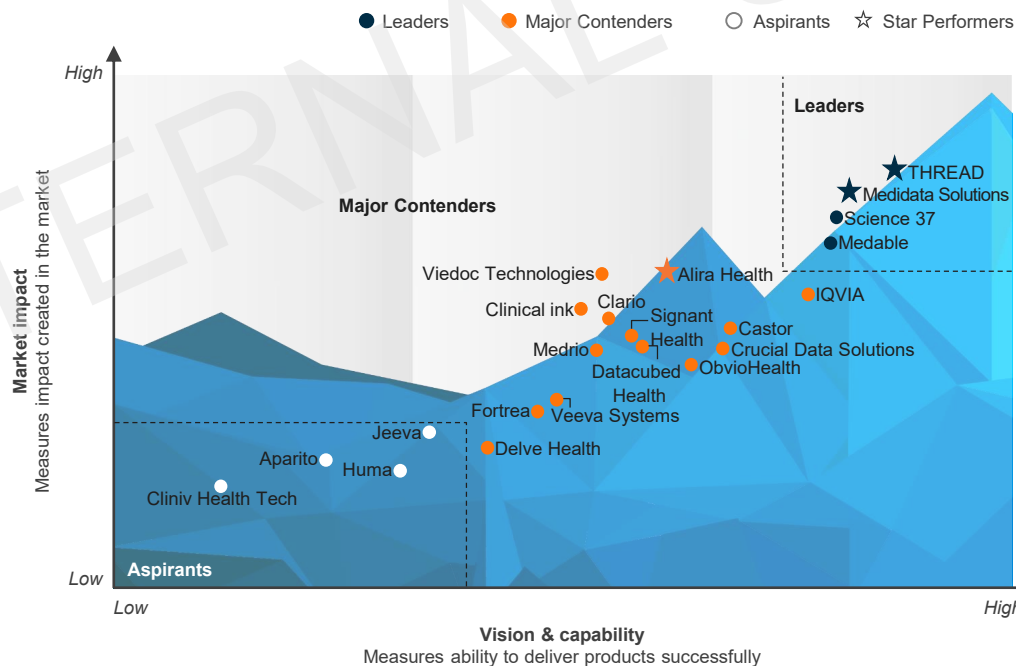
### Everest Group PEAK Matrix® for decentralized clinical trial platforms

Everest Group classified 22 DCT providers on the Everest Group PEAK Matrix® into the three categories of Leaders, Major Contenders, and Aspirants. The PEAK Matrix® is a framework to assess the overall vision and capability and market impact of platform providers.

- **Leaders:** There are four DCT platform providers in the Leaders category – Medable, Medidata Solutions, Science 37, and THREAD
- **Major Contenders:** The Major Contenders category has fourteen DCT platform providers – Alira Health, Castor, Clario, Clinical ink, Crucial Data Solutions, Datacubed Health, Delve health, Fortrea, IQVIA, Medrio, ObvioHealth, Signant Health, Veeva Systems, and Viedoc Technologies
- **Aspirants:** There are four DCT platform providers in the Aspirants category – Aparito, Cliniv Health Tech, Huma, and Jeeva



### Everest Group Decentralized Clinical Trial Platforms PEAK Matrix® Assessment 2023 – Update<sup>1,2</sup>



1 Assessments for Clinical ink, Fortrea, Signant Health, Aparito, and Huma excludes platform provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, platform providers' public disclosures, and Everest Group's interactions with decentralized clinical trial platform buyers

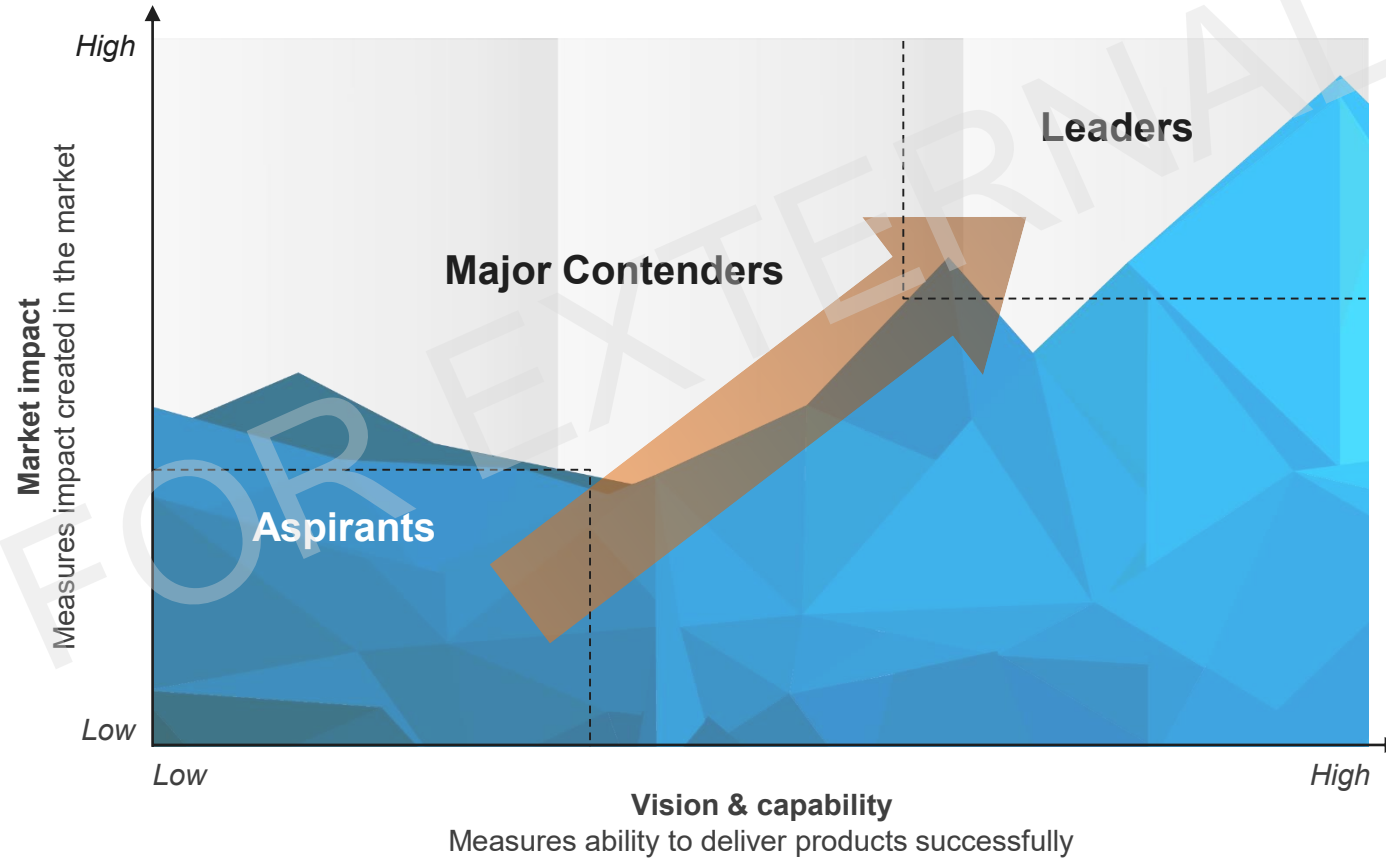
2 Assessments for Veeva Systems is based on partial primary inputs

Source: Everest Group (2023)

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



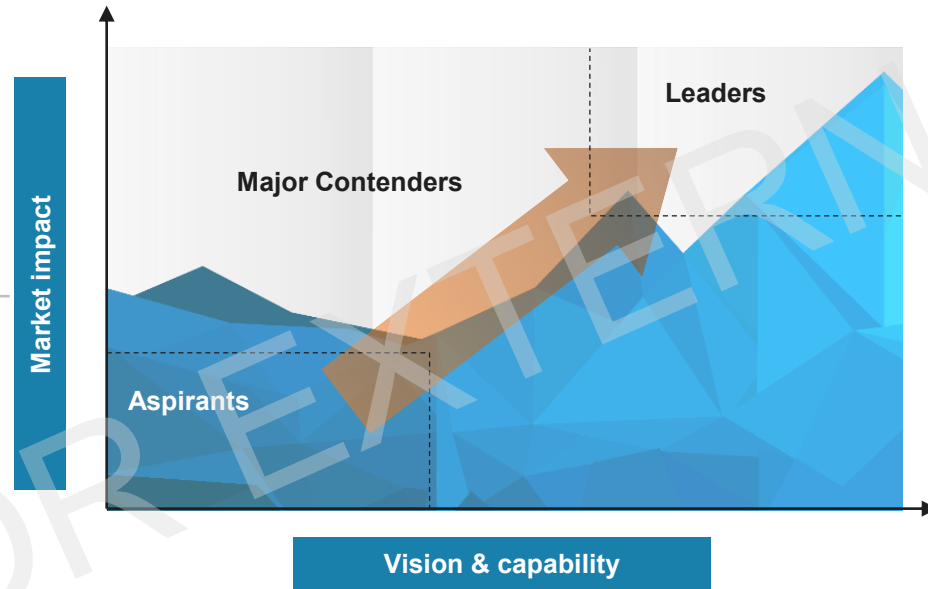
Everest Group PEAK Matrix



# Products PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

Market adoption
Number of clients, revenue base, and YoY growth
Portfolio mix
Diversity of client base across industries, geographies, environments, enterprise size class
Value delivered
Value delivered to the client based on customer feedback and other measures



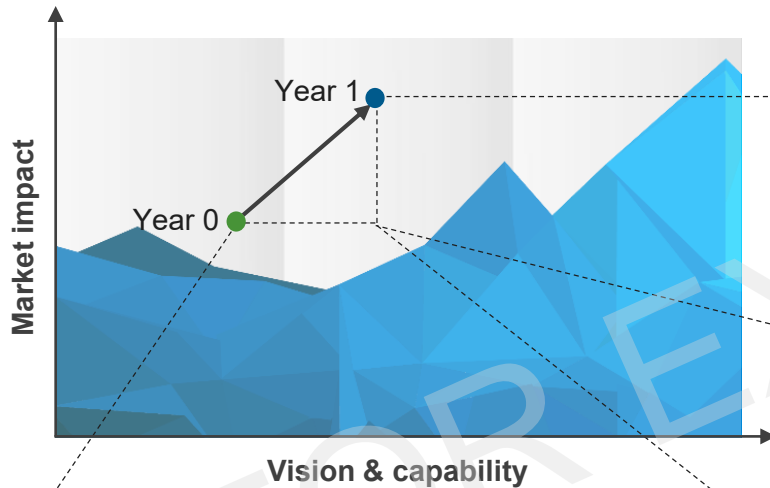
Measures ability to deliver products successfully. This is captured through five subdimensions

Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support
Vision for the client and itself; future roadmap and strategy	Technical sophistication and breadth/depth across the technology suite	Configurability/customize-ability, hosting and tenancy, integration, governance, and security and compliance	Progressiveness, effectiveness, and flexibility of engagement and commercial models	Training, consulting, maintenance, and other support services

# Everest Group confers the Star Performers title on providers that demonstrate the most improvement over time on the PEAK Matrix®

## Methodology

Everest Group selects Star Performers based on the relative YoY improvement on the PEAK Matrix



In order to assess advances on **market impact**, we evaluate each vendor's performance across a number of parameters including:

- Yearly YoY revenue growth
- # of new licenses and extensions
- Value of license signings
- Improvement in portfolio mix
- Improvement in value delivered

In order to assess advances on **vision and capability**, we evaluate each vendor's performance across a number of parameters including:

- Innovation
- Increase in product scope and functionality
- Expansion of product associated consulting, training, support, and maintenance capabilities
- Technology/domain specific investments

We identify the vendors whose improvement ranks in the top quartile and award the Star Performer rating to those vendors with:

- The maximum number of top-quartile performance improvements across all of the above parameters AND
- At least one area of top-quartile improvement performance in both market success and capability advancement

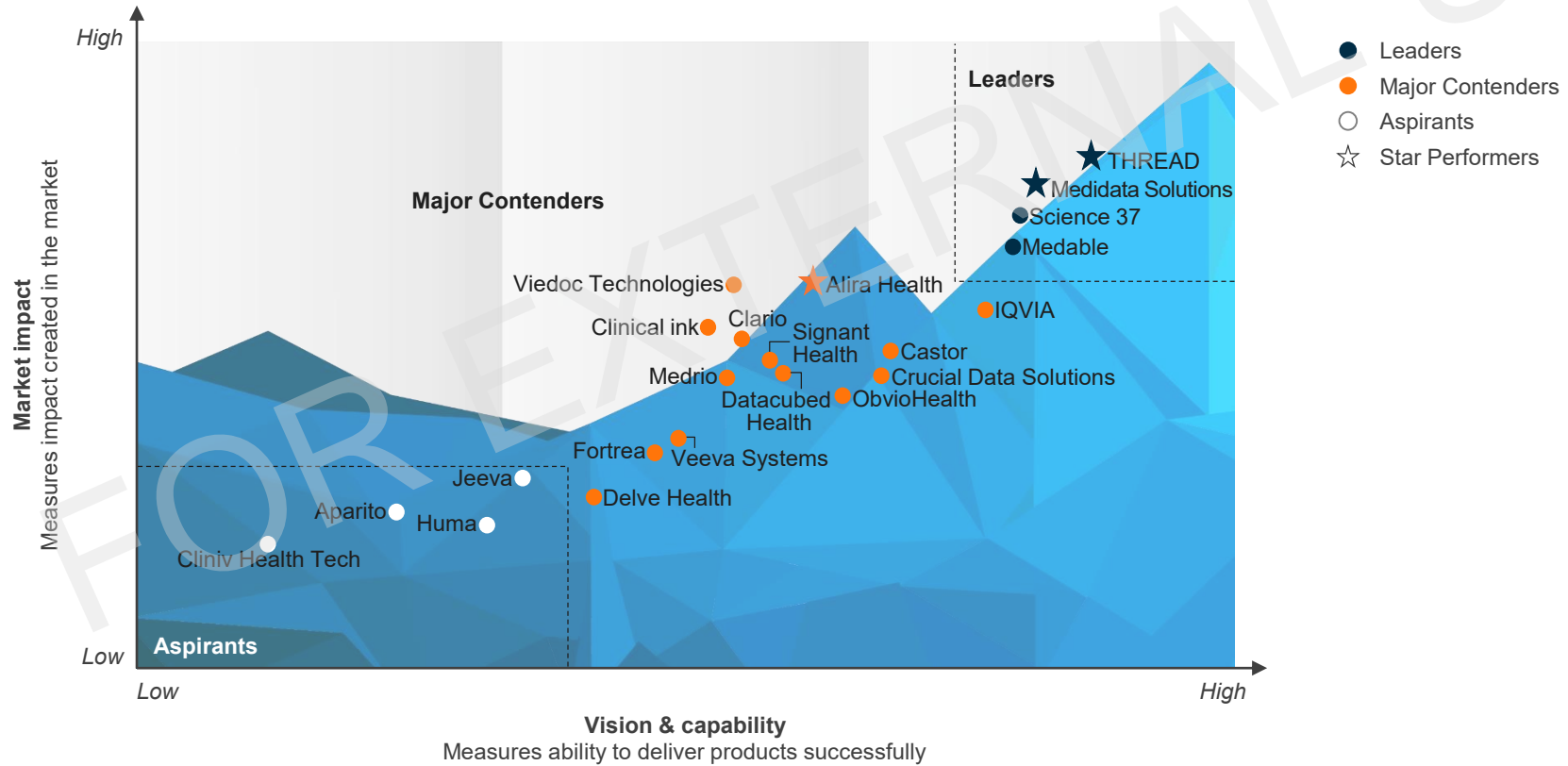
*The Star Performers title relates to YoY performance for a given vendor and does not reflect the overall market leadership position, which is identified as Leader, Major Contender, or Aspirant.*

# Everest Group PEAK Matrix®

## Decentralized Clinical Trial Platforms PEAK Matrix® Assessment 2023 – Update



### Everest Group Decentralized Clinical Trial Platforms PEAK Matrix® Assessment 2023 – Update<sup>1,2</sup>



<sup>1</sup> Assessments for Clinical ink, Fortrea, Signant Health, Aparito, and Huma excludes platform provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, platform providers' public disclosures, and Everest Group's interactions with decentralized clinical trial platform buyers

<sup>2</sup> Assessments for Veeva Systems is based on partial primary inputs

Source: Everest Group (2023)

## Decentralized clinical trial platforms PEAK Matrix® characteristics

### Leaders

Medable, Medidata Solutions, Science 37, and THREAD

- Leaders provide an end-to-end unified platform with modular capabilities, facilitating adaptability and scalability to diverse and evolving needs of clinical trials
- Leaders have established a diverse partnership network covering, technology, Real-World Evidence (RWE), sensors & wearables, services, and partnerships with CROs and site networks
- Leaders distinguish themselves through substantial investments in next-gen technologies, including AI/ML, RWE, and sensors and wearable devices
- Leaders are ranked high on domain expertise, user experience for patients and sites, and global capabilities to orchestrate DCTs

### Major Contenders

Alira Health, Castor, Clario, Clinical ink, Crucial Data Solutions, Datacubed Health, Delve Health, Fortrea, IQVIA, Medrio, ObvioHealth, Signant Health, Veeva Systems, and Viedoc Technologies

- Major contenders exhibit a distinctive understanding of specific Therapeutic Areas (TAs) and demonstrate agility in incorporating user input, enhancing both patient and site experience
- Few major contenders lack an end-to-end platform for conducting DCT trials, causing a fragmented user experience as users navigate multiple interfaces
- Some major contenders lack the requisite domain expertise and resources to effectively conduct trials for large pharmaceutical companies or provide support for studies spanning multiple countries
- Major contenders exhibit limited thought leadership on DCTs and are yet to establish a comprehensive partnership network capable of facilitating a wide range of services, including recruitment and home nursing for patients

### Aspirants

Aparito, Cliniv Health Tech, Huma, and Jeeva

- Aspirants in the field are comparatively new to DCT landscape and lack a mature platform, both in terms of the breadth of features and services offered, as well as the user interface and experience
- Aspirants do not possess robust partnership networks and lack the capability to scale and adequately support large-scale trials

## Everest Group has identified following platform providers as the 2023 Star Performers (page 1 of 2)

### Decentralized Clinical Trials Platform Star Performers



### Distinguishing features of market impact in 2023

- Collaboration with Walgreens and site networks to establish a robust DCT ecosystem
- Strategic acquisitions including BePatient, PatchAI, and Self Care Catalyst
- Launch of registries for lupus and Myasthenia gravis (MG)

### Distinguishing features of capability advancements in 2023

- Enhancements to its patient-centric platform, Health Storylines
- Investments in RWD and RWE solutions to enable direct to patient evidence generation
- Offers robust patient engagement tools and services

### Change in PEAK Matrix® positioning for DCT platforms

Strengthened its **Major Contenders** positioning



- Creation of the Medidata SiteTech Board powered by Society for Clinical Research Sites (SCRS), aiming to enhance collaboration among sites, sponsors, and CROs
- Launch of Medidata Diversity Program that facilitates diversity, equity and inclusivity in clinical trials
- Investments in DCT advisory services

- Release of a patient-facing app called myMedidata on iOS and Android
- Investments in site-facing tools that enable EHR integration with clinical data
- Launch of Clinical Data Studio, aiming to enhance data integration
- Introduced pre-trial and post-trial registries, featuring a nurse-enabled site matching offering

Strengthened its **Leaders** positioning

Source: Everest Group (2023)



## Everest Group has identified following platform providers as the 2023 Star Performers (page 2 of 2)

### Decentralized Clinical Trials Platform Star Performers

THREAD™

### Distinguishing features of market impact in 2023

- Partnerships with key CROs, including collaboration with UBC, introducing the central coordinating site model SitePlus, partnering with Allucent for Patient Direct Trials, and collaborating with RQM+ to deliver an end-to-end solution for MedTech
- Streamlined access to its patient-first research capabilities by launching on AWS Marketplace
- Continues to receive positive industry feedback amidst a challenging business environment

### Distinguishing features of capability advancements in 2023

- Enhancements to its eCOA offering, including an expanded global library
- Launch of artificial intelligence (AI) tools to further automate patient insight generation for customers
- Partnership with SAS, offering a proprietary solution combining SAS's AI and analytics with THREAD's DCT platform
- Collaboration with Datavant to provide Real World data (RWD) linkage
- Enhancements to training and support for sites









































### Change in PEAK Matrix® positioning for DCT platforms

Strengthened its **Leaders** positioning

# Summary dashboard | market impact and vision & capability assessment of providers for decentralized clinical trials platform 2023

## Leaders







































































Measure of capability:  Low  High

Providers	Market impact				Vision & capability					
	Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall
Medable										
Medidata Solutions										
Science 37										
THREAD										

# Summary dashboard | market impact and vision & capability assessment of providers for decentralized clinical trials platform 2023

## Major Contenders (page 1 of 2)







































































Measure of capability:  Low  High

Providers	Market impact				Vision & capability					
	Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall
Alira Health										
Castor										
Clario										
Clinical ink										
Crucial Data Solutions										
Datacubed Health										
Delve Health										

# Summary dashboard | market impact and vision & capability assessment of providers for decentralized clinical trials platform 2023

## Major Contenders (page 2 of 2)









































Measure of capability:  Low  High

Providers	Market impact				Vision & capability					
	Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall
Fortrea										
IQVIA										
Medrio										
ObvioHealth										
Signant Health										
Veeva Systems										
Viedoc										

# Summary dashboard | market impact and vision & capability assessment of providers for decentralized clinical trials platform 2023

## Aspirants

Measure of capability:  Low  High

Providers	Market impact				Vision & capability					
	Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall
Aparito										
Cliniv Health Tech										
Huma										
Jeeva										

# 03

## Enterprise sourcing considerations











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- Leaders
  - Medable
  - Medidata Solutions
  - Science 37
  - THREAD

# Medable

## Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall
									

### Strengths

- Medable provides a unified and modular platform for decentralized trials, offering flexibility
- Medable's Patient Caregiver Network (PCN) and dedicated Patient Success team provide a comprehensive suite of services to enhance patient engagement and contribute to patient-centered clinical trials
- It has good focus on sensor and wearable integration and is building standard sensor libraries for smoother integration
- It has established a robust partnership network encompassing diverse service categories, including Real-World Data, Sensors, and Services Partners
- It is making strategic investments in an integration platform to establish a foundation for all data partners, sensors, real-world data, and clinical system integrations
- Medable's extensive training programs and strategic workshops provide valuable educational resources and insights to clients helping build market awareness











### Limitations

- Clients have faced integration challenges with third-party Electronic Data Capture (EDC) systems and are encouraged to use Medable's proprietary solutions for data capture instead
- Medable is perceived to be a premium priced DCT product provider
- Clients mention that employee churn has had some impact on the quality and availability of support services

# Medidata Solutions

## Everest Group assessment – Leader and Star Performer

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall
									

### Strengths

- Clients mention that the team's expertise in Good Clinical Practice (GCP) and clinical trials sets Medidata apart
- Medidata is appreciated for its collaborative platform development, ensuring that the platform is tailored to specific needs of a client
- Medidata's Professional Services team offers industry expertise to support project evaluations, study development, implementations, user adoption, education, and support
- The use of Medidata Registry for long-term patient databasing improves patient engagement and recruitment
- Medidata stands apart with offerings like Rave Companion that enables data import from EHR into Rave EDC, reducing site effort in data entry and query resolution
- Access to the system through both web and mobile applications, utilizing the same login credentials provides a convenient and flexible user experience
- Medidata collaborates with a range of partners, focusing on sensor integrations, real-world data utilization, patient support, and strategic alliances with CROs

### Limitations











- Clients mention that the platform's navigational experience feels fragmented, lacking a cohesive flow and intuitive structure
- Users find the UI/UX of Medidata outdated and not in line with modern, user-friendly design
- The response times and turnaround times for assistance are often slower than desired, potentially causing delays in resolving issues or inquiries
- Clients, especially small pharma companies, perceive it as expensive and not competitively priced



# Science 37

## Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall
									

### Strengths

- Science 37 unifies trial components into a single, streamlined user interface eliminating the need for users to navigate multiple applications and devices
- It can independently partner with healthcare professionals or directly engage with patients, promoting broader trial access
- Science 37 has established a comprehensive and diverse partnership network, collaborating with various technology providers, CROs, and academic institutions
- Clients value its use of specialized clinical expertise and consultants, optimizing DCT implementation
- It offers strong support and effective client management for seamless trial operations











### Limitations

- Clients encountered challenges in meeting expected enrollment targets due to potential underestimation of recruitment needs and a slow ramp-up process
- Clients suggest that competition between sites and Metasite may have hindered access to specific patient pools, impacting the pace of recruitment
- Clients have raised issues with data quality, citing duplicated patient entries, and expressed dissatisfaction with the lack of desired diversity in the patient pool for studies
- Some concerns were raised around Science 37’s financial stability
- Clients have indicated that they perceive Science 37’s offerings as having a high cost relative to the Return on Investment (ROI)
- There are concerns around scalability of Science 37’s operations due to high revenue dependency on North America

# THREAD

## Everest Group assessment – Leader and Star Performer

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall
									

### Strengths

- THREAD offers a streamlined, end-to-end DCT solution, covering design, recruitment, and conduct
- It has comprehensive global capabilities, making it a suitable choice for multinational studies
- It boasts a strong partnership network covering technology, Real-World Evidence (RWE), auxiliary services, sites, and payments, highlighting a collaborative approach
- Clients praise THREAD's ability to quickly set up studies and adapt to diverse study designs through flexible configurations
- Clients value THREAD's extensive eCOA library and effective data collection/reporting, providing valuable insights throughout the clinical trial process
- It is rated highly for its domain expertise, client/project management, and robust support services
- Clients praise THREAD for demonstrating its platform's effectiveness through numerous case studies, boosting confidence in its ability to meet diverse study requirements

### Limitations

- It should look to simplify APIs for integrating with sensors and wearables and enhance frameworks to optimize data ingestion from wearables
- Clients call for better global support in the consent process
- In hybrid trials, the process of capturing and merging data in the system was somewhat cumbersome for a few clients
- Patients find the UI/UX strong, but sites and sponsors face usability challenges and desire improved engagement and functionality

## Enterprise sourcing considerations











- Major Contenders

- 
- Alira Health
  - Castor
  - Clario
  - Clinical Ink
  - Crucial Data Solutions
  - Datacubed Health
  - Delve Health
  - Fortrea
  - IQVIA
  - Medrio
  - ObvioHealth
  - Signant Health
  - Veeva Systems
  - Viedoc Technologies

# Alira Health

## Everest Group assessment – Major Contender and Star Performer

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall
									

### Strengths

- Alira Health offers seamless integration capabilities with wearables, biosensors, and external data sources
- The platform is highly adaptable, swiftly adjusting to the unique requirements of the study protocol
- The platform offers a consistent user-friendly and intuitive experience, facilitating easy navigation and customization
- Clients appreciate its notable efficiency in leveraging analytics for academic research, enabling rapid analysis and modifications
- It offers a patient-facing app and engaging patient content, enhancing patient involvement and feedback in trials

### Limitations

- Alira Health lacks a significant global presence and needs to establish more partnerships in various regions, alongside increased engagement with the medical community
- Clients have indicated a need for platform improvements, specifically in addressing the unique requirements of therapeutic areas like rare diseases, including better site identification for rare diseases
- The overall costs for running DCTs are perceived as high by clients
- There is room for improvement in the speed of support services and turnaround times

# Castor

## Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall

### Strengths

- Clients appreciate how easy it is to build studies on Castor and value the consulting services available for study building
- It offers smooth integration between eConsent and EDC
- Clients value the efficiency of reusing study components in other studies, saving time and effort on study setup
- Castor provides valuable support to sites by assisting them in their interactions with local Institutional Review Boards (IRB)
- Clients cite the incorporation of user feedback into frequent system updates, enhancing the platform based on user input
- It is considered reasonably priced in the DCT market
- It is highly rated for its domain expertise, support services, and client/project management
- It has an extensive portfolio of medical device clients, demonstrating specialized expertise in medical device trials











### Limitations

- Clients encountered challenges with data extract formatting and usability during the analysis phase, particularly regarding file naming systems
- Clients seek improvements in the intuitiveness of the ePRO to prevent user fatigue during form completion
- Castor can eliminate the need for separate accounts for consent and forms/surveys, and consolidating the eConsent process into a single form
- Clients recognize Castor primarily for its EDC and eConsent capabilities, but it is not as well-known for its eCOA/ePRO solutions

# Clario

## Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall
									

### Strengths

- Its eCOA capabilities are highly sophisticated, and it demonstrates a deep understanding of user needs while maintaining flexibility
- Clario demonstrates a high level of domain expertise in the areas of cardiac safety and respiratory assessments
- It is strategically investing in medical imaging solutions and wearable devices to augment its DCT offerings
- Clario's clients value the effectiveness of its training and deployment and its support services
- Clients mention that it stands apart from other competitors due to its expertise and advisory support
- Clients appreciate the quality they receive for the price paid and commend its flexibility in pricing











### Limitations

- The platform requires a separate interface for televisits, leading to a fractured navigation experience for users
- The patient-facing interface could benefit from improvements in terms of user interface (UI/UX) and user-friendliness
- Clients express a desire for monitoring data to be more meaningful and customized to meet the specific needs of sites, CRAs, and sponsors
- Clients have reported experiencing inconsistencies in their project management due to variations in the quality of expertise and management

# Clinical ink

## Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall
									

### Strengths

- Clients appreciate its flexibility, speed, and consistent adherence to study completion and delivery timelines, making it a dependable solution
- It is appreciated for its robust domain expertise and its commitment to delivering high-quality data
- Clinical ink is valued for its client/project management, demonstrating its responsiveness to sponsor needs and ensuring smooth project execution
- It is recognized for its direct data capture ecosystem, capable of seamlessly ingesting various forms of electronic data for comprehensive data collection and management











### Limitations

- User interface/user experience (UI/UX) from a patient's perspective could benefit from improvements to make it more user-friendly and engaging
- There is a need for an expanded and improved support system for patients and sites
- Clients desire more comprehensive reporting features to facilitate data analysis and visualization
- It can look to invest in next - generation technologies, such as data collection by incorporating voice technology, and leveraging AI and ML for process efficiencies and automation

## Crucial Data Solutions

### Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall
									

#### Strengths

- Crucial Data Solutions offers a comprehensive and flexible platform for conducting DCTs
- Clients appreciate its integration capabilities for wearables and other technologies for RWE collection
- The platform enables rapid setup through a low-code/no-code environment and drag-and-drop design features for study configuration
- Clients highlight the excellent customer service, and commend the product team’s receptiveness to their requests and their efficiency in swiftly incorporating those requests into releases
- It is appreciated for its competitive pricing and negotiation flexibility, enabling the development of specific product features to meet unique project requirements
- Crucial Data Solutions extends its service portfolio to include white-labeling options, allowing clients to rebrand the platform as needed

#### Limitations











- Clients mention that the UI/UX, especially for mobile devices, could be enhanced to be more modern, appealing, and user-friendly
- Clients desire more guidance and assistance regarding the legal landscape for eConsent
- There is a need for significant improvements in the report tab, as it currently lacks ability to generate custom reports and provide a more robust data output
- It can look to build a more robust partnership network by investing in partnerships for recruitment and site networks
- It has yet to establish a substantial presence among large pharmaceutical clients



# Datacubed Health

## Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall
									

### Strengths

- Clients appreciate the platform's focus on AI and behavioral sciences to enhance patient engagement
- It stands apart for its user-friendly UI/UX, interactive features for patients and an intuitive design
- The platform's analytics capabilities are impressive, providing valuable insights
- Clients appreciate the platform's receptiveness to feedback and their efficiency in incorporating user inputs into platform updates
- Datacubed Health excels in client/project management, and strategic/consultative partnerships, earning high ratings by clients











### Limitations

- Clients express the desire for a more integrated set of services, reducing the necessity to use multiple platforms (for logistics, travel expenses) during clinical trials
- Clients have concerns about the platform's scalability and the ability to handle large-scale trials
- It can strengthen its thought leadership by publishing more case studies to boost client confidence in the platform's track record of successful trial executions
- It can look to build a more robust partnership network by partnering with CROs and site networks

# Delve Health

## Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall
									

### Strengths

- The platform provides a comprehensive suite of solutions, covering screening, consent, ePRO, wearables, and a dedicated patient concierge team
- Platform flexibility allows for customization on a study-by-study basis, ensuring that studies can be adapted to unique requirements
- It is appreciated for its advanced device integration capabilities, allowing the incorporation of various devices with configurable options to enhance data collection
- Clients appreciate its competitive pricing and responsive customer support











### Limitations

- It should consider developing a stronger partnership network, encompassing collaborations for recruitment and site networks
- The company should consider expanding its product development team and focus on maturing its offering to meet the needs of large pharmaceutical clients

# Fortrea

## Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall
									

### Strengths

- Fortrea’s SnapClinical™ platform provides an end-to-end unified solution for DCTs
- Fortrea offers a comprehensive range of mobile clinical services, encompassing in-home mobile clinical services, central and local pharmacy services, and site support services
- SnapClinical™ offers Drag-and-Drop capabilities, simplifying the development of customized UI components
- It is appreciated for its web preview functionality, allowing users to simulate patient journey before deployment, helping improve user experience and trial design











### Limitations

- Fortrea's core business centers around its role as a CRO, and its level of maturity in the field of DCT products might not be as advanced
- It has low market awareness in DCT market due to limited availability of resources and case studies related to DCTs

# IQVIA

## Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall
									

### Strengths

- IQVIA offers a comprehensive suite of technologies facilitating various aspects of DCT complemented by a range of auxiliary services
- It offers extensive industry experience and demonstrates expertise in conduct of global trials
- It places emphasis on patient-centricity, incorporating patient feedback and perspectives throughout trial planning and execution
- Clients appreciate the easily accessible online resource guides and prompt support from the help desk
- IQVIA provides home nursing services through a global team of mobile research clinicians who actively engage with patients in their homes, thereby creating a patient-centric trial experience











### Limitations

- IQVIA has limited thought leadership in the field of DCTs, which affects its visibility in the DCT market
- Users have reported encountering issues related to saving passwords and eDiary submissions within the application
- While clients deem IQVIA's offering to be value for money, it is still considered a premium priced product

# Medrio

## Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall
									

### Strengths

- Clients cite high levels of user satisfaction among study coordinators, sites, and nurses, who found the platform user-friendly and efficient to work with
- Clients value the platform's simplicity and flexibility, enabling them to independently construct studies
- Medrio delivers strong technical support and effective client management
- Medrio is enhancing its domain and technical expertise by investing in a team of experts who can offer consulting on projects with intricate study protocols
- It provides access to an online community of customers that offers resources, training, and collaboration with professionals through user groups and forums
- Clients consider it to be a competitively priced offering in the DCT market











### Limitations

- The UI/UX of the ePRO system needs to be more intuitive and user-friendly
- Clients desire an application format for ePRO to eliminate the need for repeated sign-ins
- A more comprehensive and easily accessible collection of training materials on the website is needed
- Deployment was reported as time-consuming, requiring improvements to streamline the process
- Reporting capabilities require enhancement for a more robust user experience

# ObvioHealth

## Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall
									

### Strengths

- ObvioHealth offers full-service capabilities, covering aspects like consent, data capture, recruitment, and analysis, ensuring comprehensive support throughout the trial process
- It stands apart due to its experience in medical technology and wearable devices trials
- Clients appreciate its ability to execute trials quickly, demonstrating efficiency in trial management
- Clients mention seamless integration with existing enterprise solutions, ensuring a smooth deployment process
- It is rated high on domain expertise, client/project management and support services
- It remains invested in a strategic integration with Oracle's Clinical One EDC platform, and partnership with Dedalus, offering access to patient database, facilitating efficient patient recruitment











### Limitations

- The rigidity of the software posed a challenge, making it less user-friendly and adding to the time required for operations
- The patient interface requires enhancements in terms of UI/UX and navigation
- Clients express concerns about limited study configuration options, making it challenging to balance maintaining a standardized core system while tailoring it to specific study requirements

# Signant Health

## Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall
									

### Strengths

- The platform offers a comprehensive suite of solutions, including EDC/DDC (full form), eCOA, eConsent, RTSM, Participant Tracker, and TeleVisits
- It offers an extensive eCOA library with a focus on quality and rapid implementation, including standard scales for various therapy areas and computerized adaptive tests
- It is valued for its comprehensive range of services and expertise, including eCOA design, logistics, translation, scale management, and patient-facing support
- It offers a flexible service model, providing both self-service and full-service options based on the specific needs of each study











### Limitations

- Depending on the level of service and features required, the cost of using Signant Health's solutions can be relatively high
- Clients have noted limitations in the platform's maturity, particularly in terms of its eConsent, reporting capabilities, and configuration options
- It offers two separate apps for patient engagement and eCOA, which could be streamlined into a single app for enhanced efficiency

# Veeva Systems

## Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall
									

### Strengths

- Veeva offers a suite of unified clinical operations applications from study initiation to management, documentation, payments, and training on a single cloud platform
- Its dedicated patient app, MyVeeva, offers engagement and scalability
- The data flow between MyVeeva, Site Vault, and the sponsor portal enhances integration and data accessibility
- The platform is known for its ease of use, intuitive UI/UX design, and navigational simplicity
- It has established a strong partnership network that includes CROs and technology partners

### Limitations











- Veeva is primarily recognized as Development Cloud rather than a comprehensive DCT solution
- Its ePRO platform is currently in early stages of development and has experienced limited initial adoption
- Clients desire improved user experience in API integrations
- It currently does not provide an end-to-end solution. It lacks televisit capabilities, recruitment features, and robust patient engagement functionalities



# Viedoc Technologies

## Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall
									

### Strengths

- Its platform is praised for its flexibility and rapid study build, showcasing its agility in configuring trials efficiently
- Clients appreciate its strong integration capabilities and efficient data export functionalities
- It stands out for its user-friendly interface, highly appreciated by site staff
- It offers a cost-effective solution without compromising on quality and efficiency, making it a prudent choice in terms of cost
- It is valued for its project management capabilities and regular engagement with clients
- The platform offers highly responsive customer support, ensuring a smooth user experience

### Limitations

- It lacks a dedicated mobile application for patients, potentially limiting patient engagement and accessibility through mobile devices
- The platform has limited capability around integrating data recorded on paper into the system
- Clients desire enhancements for efficient handling of deviations and enabling CROs to complete forms for patients
- Clients report that the system slows down as the size of study increases or as new features are integrated
- Clients advocate for a low-code approach to building customizable reports without the need for extensive coding











## Enterprise sourcing considerations

- Aspirants
  - Aparito
  - Cliniv Health Tech
  - Huma
  - Jeeva

# Aparito

## Everest Group assessment – Aspirant

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall
									

### Strengths

- Atom5™ is an end-to-end clinical trial platform that supports Video Assessments, eCOA, Telemedicine, Wearables, and eConsent, all accessible through a single smartphone app
- The platform's ability to conduct Video Clinical Outcome Assessments (vCOA), provides a means to capture meaningful endpoints in disease progression
- It collaborates with patient groups to develop novel endpoints and digital biomarkers
- Atom5™ offers capabilities in areas such as ataxia, neurodegenerative diseases, rare diseases, and pediatrics











### Limitations

- It can look to establish thought leadership within the DCT market, which could enhance its brand visibility
- Lack of partnerships with CROs and site networks, may limit support for clinical trials
- It does not have demonstrated expertise in therapeutic areas beyond rare diseases
- The majority of the company's business comes from the UK and Europe, restricting its global reach

# Cliniv Health Tech

## Everest Group assessment – Aspirant

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall
									

### Strengths

- The platform offers cost-effective solutions for conducting DCTs
- The platform provides a suite of solutions for DCTs, covering e-recruitment, eConsent, televisits, remote monitoring, e-OA, e-PO, and direct data capture
- It enables real-time data flow from DCT platform to an integrated EDC system, ensuring data accuracy and efficiency











### Limitations

- The company's primary focus is on the Asia Pacific region, which may restrict its global reach
- The platform lacks partnerships with CROs, site networks, and recruitment partners, which can potentially limit its ability to support clinical trials effectively
- The UI/UX can benefit from improvements as it does not meet the contemporary industry standards
- The platform lacks comprehensive patient engagement features, potentially impacting the patient experience in clinical trials
- The company's size may limit its ability to scale up and handle larger studies

# Huma

## Everest Group assessment – Aspirant

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall
									

### Strengths

- The recent acquisition of Alcedis GmbH has enabled the creation of a clinical trials division offering digital solutions spanning early-stage to Phase IV hybrid and fully decentralized trials
- It is known for its patient monitoring capabilities, enabling real-time data capture and analysis
- Huma is valued for its investments in AI, including collaborations with AI partners to enhance clinical productivity











### Limitations

- Huma primarily specializes in remote patient monitoring in clinical settings, and its capabilities in conducting clinical trials may be relatively less mature
- The company's geographic presence is primarily concentrated in UK and Europe, limiting its global reach in the realm of DCTs
- Huma ranks low in thought leadership on DCTs due to the limited availability of public domain resources and case studies related to the conduct of DCTs

# Jeeva

## Everest Group assessment – Aspirant

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall
									

### Strengths

- Jeeva stands out for its efficient setup process and comprehensive data management, import, and export capabilities
- It is recognized for its domain expertise and high-quality support services
- Jeeva offers competitive pricing, making it a cost-effective solution for clients
- The platform showcases expertise in conducting rare disease trials, enhancing its capabilities in this specialized area

### Limitations

- Jeeva's presence within large pharmaceutical companies is currently limited
- Jeeva lacks a dedicated patient app and key patient engagement features (gamification, rewards), suggesting the need for potential investments in this area
- Clients express the desire for a feature that enables them to access and review specific forms within a record without the need to navigate through the entire record
- Jeeva lacks partnerships with sites, recruitment partners, and wearable device providers
- Its limited geographic presence is primarily focused on North America and the APAC region, limiting its potential scalability

# 04

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## Appendix

- Glossary
- Research calendar

## Glossary of key terms used in this report

<b>AI</b>	Artificial Intelligence is the simulation of human intelligence and decision-making capability by machines
<b>Aspirants</b>	Aspirants are the third set of platform providers rated by Everest Group, according to Everest Group’s proprietary scoring methodology. They have moderate experience and delivery capability
<b>BYOD</b>	Bring Your Own Device. Refers to being allowed to use one’s personally-owned device, rather than being required to use an officially provided device
<b>CRO</b>	A Contract Research Organization is an organization that provides research services to firms in the life sciences industry on a contract basis
<b>DCT</b>	Decentralized Clinical Trial. DCTs are defined as studies executed through telemedicine and mobile/local healthcare providers, using processes and technologies differing from the traditional clinical trial model
<b>eCOA</b>	Electronic Clinical Outcomes Assessment. eCOAs are a method of capturing outcomes data electronically in clinical trials. eCOA employs technologies such as handheld devices, tablets, or the web to allow trial participants, physicians, and caregivers to directly report information related to healthcare outcomes
<b>eConsent</b>	It is the use of electronic systems and processes that may employ multiple electronic media, including text, graphics, audio, video, podcasts, passive and interactive web sites, biological recognition devices, and card readers, to convey information related to the study to obtain and document informed consent
<b>ePRO</b>	Electronic patient-reported outcome. ePROs allow patients to answer questions and report on their health through an electronic device, such as a smartphone or tablet
<b>IoT</b>	Internet of Things refers to a system or a network and connected devices such as computers and sensors, which can interact through data exchange and use analytics algorithms to make decisions
<b>ITS</b>	Information Technology Services is the transfer of ownership of some or all information technology processes or functions to a service provider. This could include core, administrative, delivery, or management-related processes or functions
<b>Leaders</b>	Leaders are the highest rated platform providers, according to Everest Group’s proprietary scoring methodology, with top-quartile performance across market success and capability
<b>LS</b>	Life Sciences – Everest Group defines the life sciences industry to include organizations in the fields of pharmaceuticals, biotechnology, and medical devices
<b>Major Contenders</b>	Major Contenders are the second-highest rated platform providers, according to Everest Group’s proprietary scoring methodology, with second or third quartile performance across market success and capability
<b>Televisits</b>	Televisits are a safe and secure way for you to connect to a doctor remotely, via video and audio connection either on a smartphone or a computer





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