



Decentralized Clinical Trial Platforms PEAK Matrix[®] Assessment 2023

November 2022

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01

Introduction and overview

- Research methodology
- Key information on the report
- Background of the research
- 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 IT services (ITS) contracts (updated annually)

Year-round tracking of all major life sciences IT service providers

Dedicated team for life sciences outsourcing research, spread over three continents

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 four key sources of proprietary information

- Proprietary database of IT services contracts of major IT service and platform providers, with life science IT services in the 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 and platform providers (updated annually)
- The database tracks the following for each service/platform providers:
 - 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
- Service/platform providers briefings
 - Vision and strategy
 - Annual performance and future outlook
- Buyer reference interviews, ongoing buyer surveys, and interactions
 - Drivers and challenges for adopting workplace services
 - Assessment of provider performance
 - Emerging priorities
 - Lessons learned and best practices
 - Key strengths and improvement areas
 - Emerging areas of investment

Providers assessed^{1,2}



1 Assessments for IQVIA, Aparito, YPrime, and REDCap Cloud 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 Analysis for Clinpal is based on capabilities before eClinicalHealth got acquired by Cambridge Cognition

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) include collecting data through sensors or remote monitoring devices carried by a patient without the need to visit a site. These trials can deliver many benefits to pharmaceutical companies including cost savings, better patient recruitment and retention, flexibility in operation, and improved data quality. Before the COVID-19 pandemic, although the technology and literature to support DCTs existed, there were only a few pilots being conducted as enterprises grappled with regulatory uncertainties, upfront capital investment in sensors and products, and limited functionalities to decentralize clinical trials. The increasing need for remote patient- and site-centric trials increased the investments in DCTs. Desired patient experience, smooth onboarding of the diverse patient population, seamless technological execution during trials, and hassle-free logistics at the site have been the focus for enterprises. The momentum is expected to accelerate as we move beyond 2022, indicating that DCTs are here for the long term. Technological advancements (cloud, AI/ML, NLP, etc.), innovative business models, increased wearables support, FDA's push to the industry to adopt DCT, and a holistic approach to clinical trials have proliferated the landscape.

The accelerated virtualization in both consumer and trial contexts caused numerous start-ups to come up with innovative and flexible offerings, changing the landscape. DCT platform providers are taking an ecosystem approach to address challenges in the DCT space through various partnerships and M&As. Through co-innovation, continuous product improvement, and market education, DCT platform providers are focusing on increasing trust, speeding up trial timelines, and delivering a smooth experience in running DCTs.

In this report, we assess the capabilities of 24 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))



Provider offerings
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

Mode of conduct				
Completely virtual		Hybrid (digitally-enabled trials)		
Core modules (technology products)				
Trial participant recruitment (screening and enrollment)	eConsent	Wearable technology with BYOD integration + Remote patient monitoring	Medication adherence	Televisit
eCOA/ePRO				
DCT platform capabilities				
Unified data platform	Integration of devices and workflows with existing clinical development systems	User training and support	Data security, privacy, and compliance	RWD collection and analysis
Site support and enablement	Single sign-on, user-friendly UI, smooth operations, multilingual offering, and support	Collaboration workflows for all stakeholders	Enterprise-wide scalability (geography and therapeutic areas)	DCT analytics (KPIs, next-best actions, and actionable insights)
Patient engagement (information exchange, feedback, training, and support)				
Enabling services (in-house/partnerships)				
Home nursing services	Patient concierge services	Medical record review services	Drug and device provisioning	Remote CRA

Inclusion criteria for the assessment: platform providers offering at least **eCOA/ePRO, eConsent, and televisit capabilities** (out of the core modules) will qualify for this assessment

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

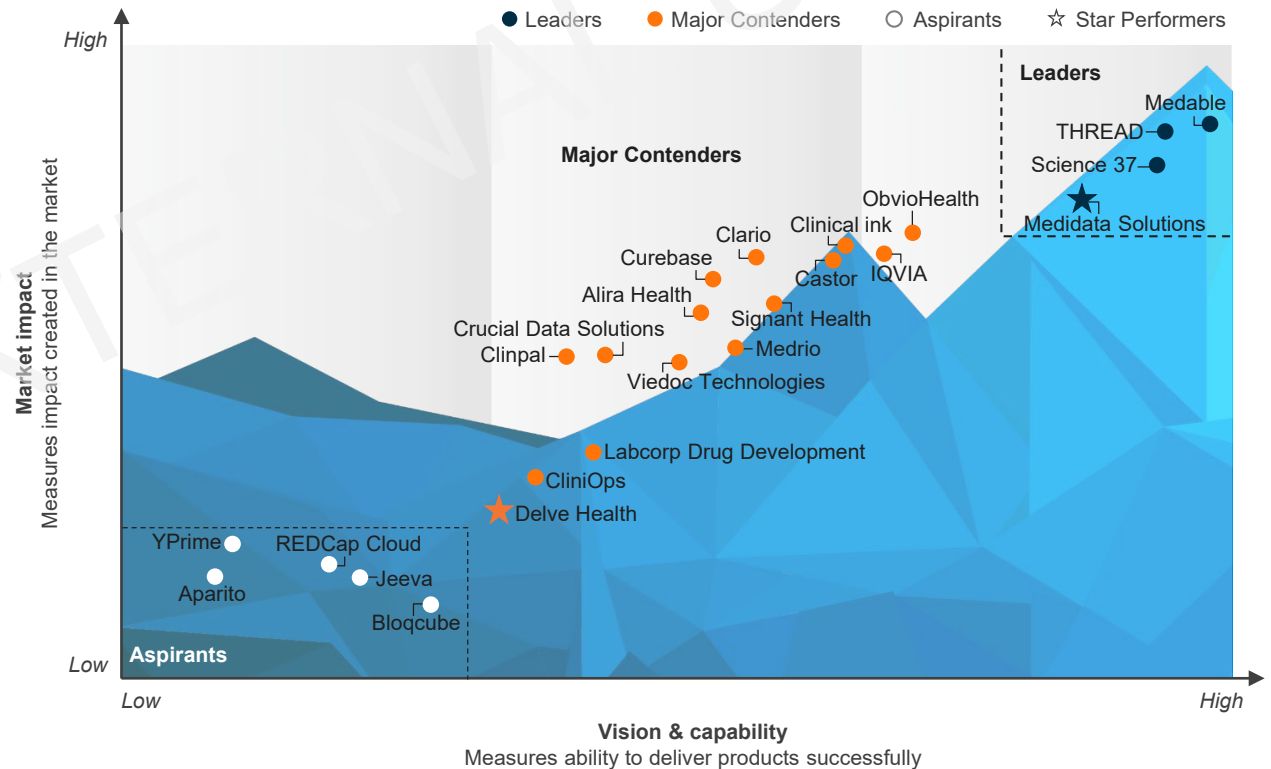


Everest Group PEAK Matrix® for decentralized clinical trial platforms

Everest Group classified 24 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 fifteen DCT platform providers – Alira Health, Castor, Clario, Clinical ink, CliniOps, Clinpal, Crucial Data Solutions, Curebase, Delve Health, IQVIA, Labcorp Drug Development, Medrio, ObvioHealth, Signant Health, and Viedoc Technologies
- **Aspirants:** There are five DCT platform providers in the Aspirants category – Aparito, Bloqcube, Jeeva, REDCap Cloud, and YPrime

Everest Group Decentralized Clinical Trial Platforms PEAK Matrix® Assessment 2022^{1,2}



1 Assessments for Aparito, IQVIA, REDCap Cloud, and YPrime 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

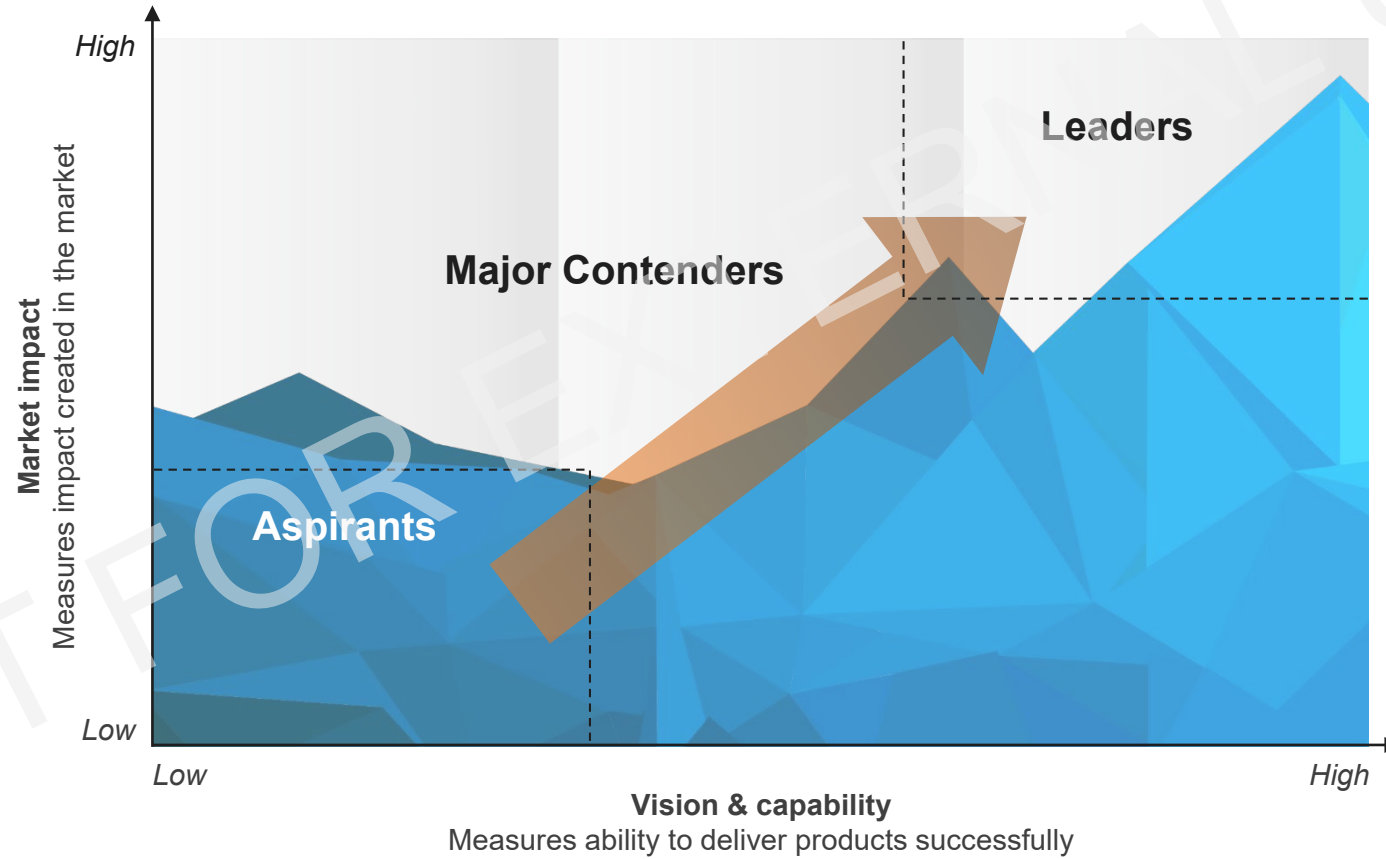
2 Analysis for Clinpal is based on capabilities before eClinicalHealth got acquired by Cambridge Cognition

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



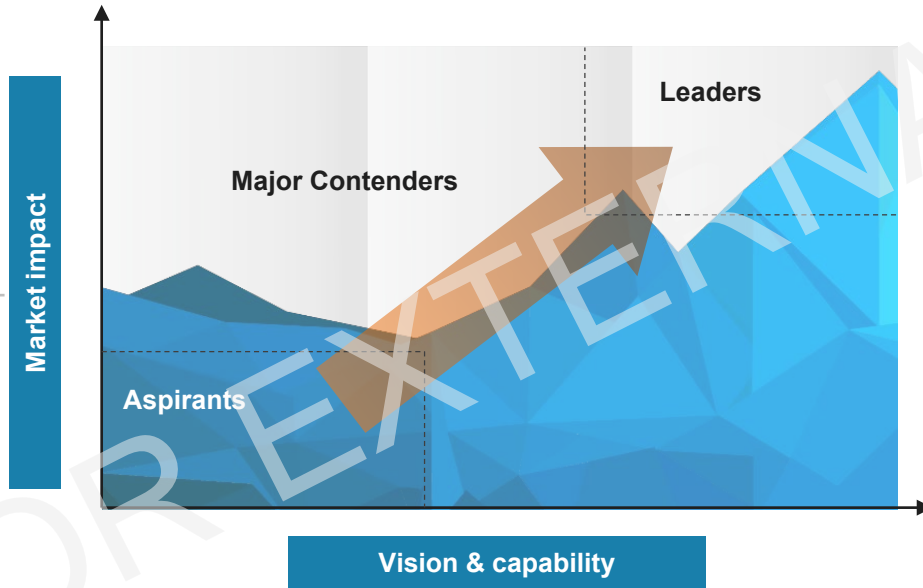
Everest Group PEAK Matrix



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



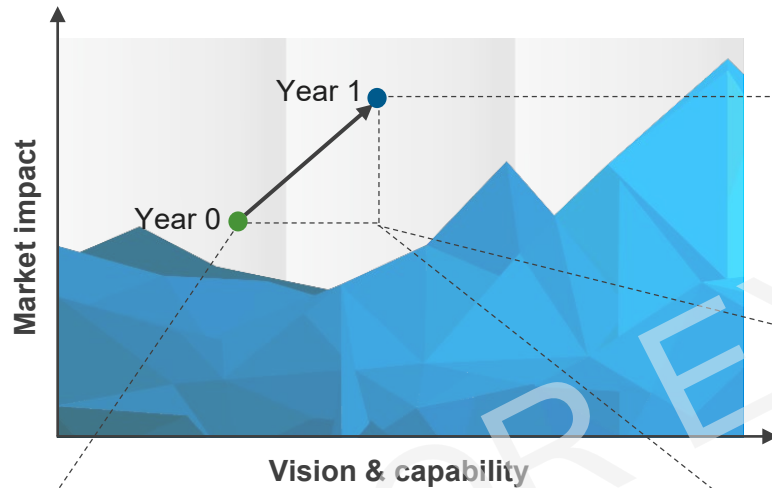
Measures ability to deliver products successfully. This is captured through five subdimensions

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

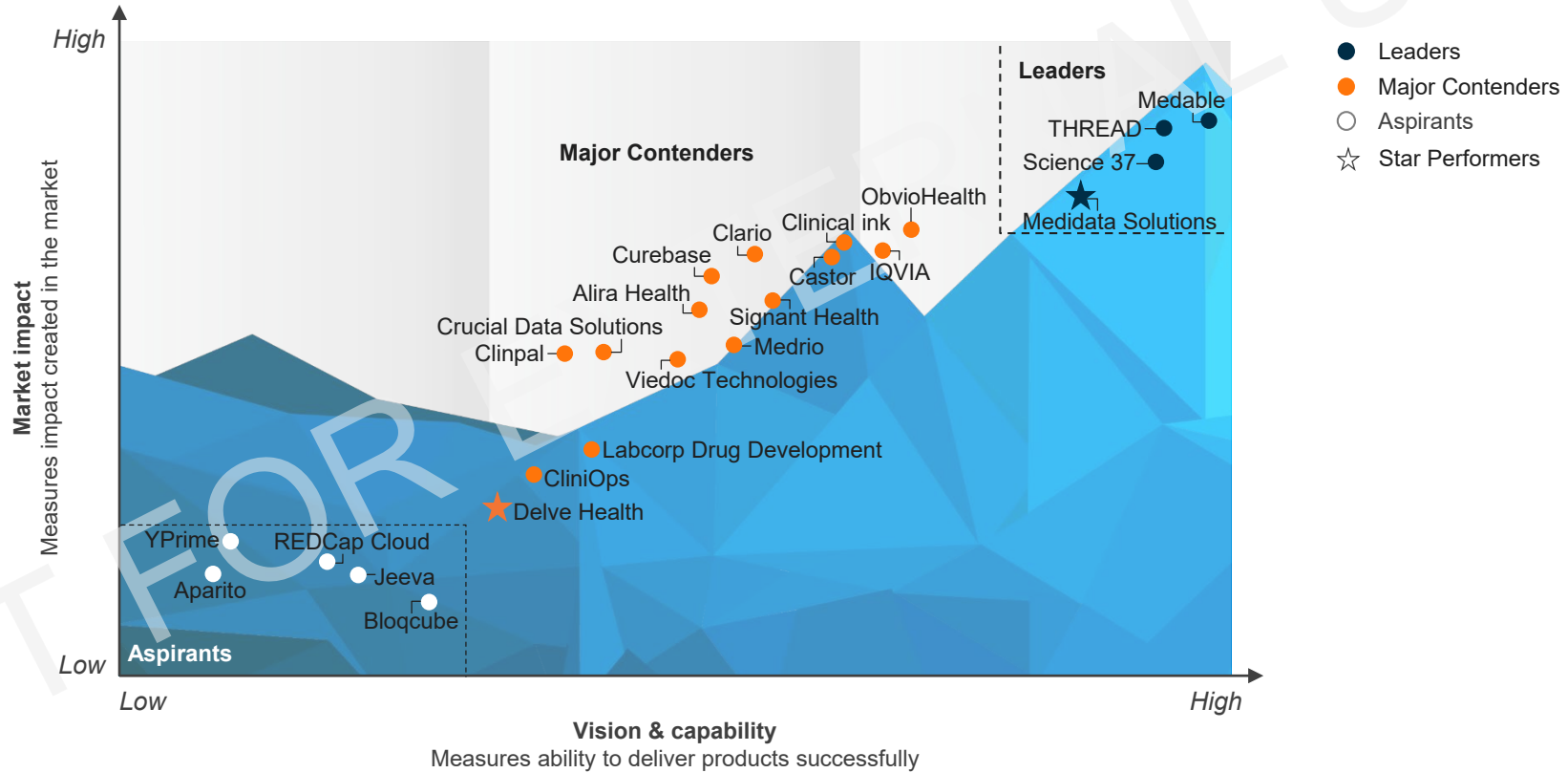
The Star Performers title relates to YoY performance for a given vendor and does not reflect the overall market leadership position, which is identified as Leader, Major Contender, or Aspirant.

Everest Group PEAK Matrix®

Decentralized Clinical Trial Platforms PEAK Matrix® Assessment 2022



Everest Group Decentralized Clinical Trial Platforms PEAK Matrix® Assessment 2022^{1,2}



1 Assessments for Aparito, IQVIA, REDCap Cloud, and YPrime 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 Analysis for Clinpal is based on capabilities before eClinicalHealth got acquired by Cambridge Cognition

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Decentralized clinical trials platforms PEAK Matrix® characteristics

Leaders:

Medable, Medidata Solutions, Science 37, and THREAD

- Leaders offer clients an end-to-end modular platform with a unified data model that allows all patient data to be in a single repository, eliminating data silos
- Leaders offer not only the DCT platforms but also the auxiliary services required to run a DCT. Science 37 offers all the auxiliary services in-house whereas Medable and THREAD partner with home health nurse networks and other service providers to offer clients complete coverage where internal capabilities do not exist
- Leaders' DCT platforms are ranked high on user and patient experience, and they offer advanced use cases to clients (such as advanced analytics and patient recruitment campaigns) to enable them to run their DCTs
- Leaders work proactively toward building market awareness and stakeholder education via various forums and enjoy high mindshare and brand perception

Major Contenders:

Alira Health, Castor, Clario, Clinical ink, CliniOps, Clinpal, Crucial Data Solutions, Curebase, Delve Health, IQVIA, Labcorp Drug Development, Medrio, ObvioHealth, Signant Health, and Viedoc Technologies

- Some of the Major Contenders do not have an end-to-end platform for enabling DCTs as, clients cite, they lack a unified data layer. However, they offer all-point solution capabilities to run DCTs, and those who have been in the space for a long time, aspire to become Leaders (such as ObvioHealth)
- Most Major Contenders lack the complete spectrum of auxiliary support services, and even though they are trying to offer all the modules of DCTs, they struggle with desired patient experience
- Major Contenders have DCT coverage limited to certain therapeutic areas and focused majorly on the North American market with some presence in the UK and APAC region

Aspirants:

Aparito, Bloqcube, Jeeva, REDCap Cloud, and YPrime

- While Aspirants may have platform for running DCTs, the solutions are relatively new or undergoing pilots; very few therapeutic areas are covered and lack in desired UI/UX
- Aspirants do not offer clients the complete suite of DCT platforms and lack capabilities such as patient recruitment and medication adherence. Individual solutions also currently lack advanced features as offered by Major Contenders and Leaders. Some Aspirants are trying to give auxiliary services through partnerships such as remote nursing

Everest Group has identified following platform provider as the Star Performers 2022

Decentralized Clinical Trials Platform Star Performer



Distinguishing features of market impact in 2022

- Medidata's Circuit Clinical strategic partnership (\$ 27Mn) and investment includes DCT sites standardized on Medidata technology, rating & reviewing the trial journey for stakeholders with 90 doctors, 30+site locations resulting in a better ecosystem
- It is constantly building on sensor cloud technology solving challenges related to sensor integrations, standardization of sensor data, and the development of digital biomarkers and algorithms
- It focused on eSource such as connecting EHR-EDC offering to decrease the data entry monitoring through RAVE
- It is investing in the growth strategy for DCTs by
 - R&D Expenditure
 - Growth of Team
 - Roadmap & inorganic strategies around decentralization

Distinguishing features of capability advancements in 2022

- Enhanced RWD collection and analysis (Medidata AI) & DCT Professional services consulting and enablement
- Creation of head of DCTs professional services role & EMR integration, and eSource
- Significant growth of the patient insights program to develop patient-centric capabilities including patient insights workshops and focus on diversity
- New programs in DCT certifications for sponsors and sites
- Medidata eSource app: DCT/eSource Site data capture for bedside, home health nursing
- myMedidata patient EHR integration: Allow patients to self-initiate EHR data into their profile

Change in PEAK Matrix® positioning for DCT platforms

Entered the Leaders category



- Delve Health integrated with other platform vendors like Medidata RAVE, EHR/EMR sources for expanded DCT services
- It increased the focus on improving the in-home patient experience by having the wearables, devices, etc.
- Partnered with Afortiori Development to expand access to clinical studies through increased adoption of decentralized clinical trials
- Number of hybrid and DCT trials conducted has increased over previous years

- Platform is focused on the integration of data and analytics and has implemented certain use cases
- Randomization features for on-site logistics improved the experience for stakeholders
- UI/UX has been improved in terms of browsing and processing









































Entered the Major Contenders category

Source: Everest Group (2022)

Summary dashboard | market impact and vision & capability assessment of providers for decentralized clinical trials platform 2022

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										
CliniOps										
Clinpal										
Crucial Data Solution										
Curebase										

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
Delve Health										
IQVIA										
Labcorp Drug Development										
Medrio										
ObvioHealth										
Signant Health										
Viedoc Technologies										

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										
Bloqcube										
Jeeva										
REDCap Cloud										
YPrime										

03











Enterprise sourcing considerations

- Major Contenders
 - 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 offers an end-to-end DCT solution, combining technology products and auxiliary services in a unified manner. Clients have appreciated the modular nature of the platform
- Clients have rated Medable highly on the quality of its products and the user experience of the platforms from patients', sites', and sponsors' perspective
- It has an extensive partnership network collaborating with players for system integration, technology, data, direct-to-patient concierge, remote sites, and retail pharmacies
- Clients appreciate Medable for incorporating feedback and providing quick and responsive support services
- Its enterprise-level deals (such as with GSK) and expansion in European countries have increased clients' confidence in the scalability of its solutions
- Medable offers digital certifications (Medable Academy) empowering professionals to design and build DCT studies on the Medable platform, increasing DCT adoption at research sites











Limitations

- Medable is perceived as a premium-priced DCT platform provider
- Clients cite internal knowledge management as an area of improvement so that domain expertise does not remain limited to a handful of people in a certain project
- Testing and delivery of solutions can become more robust and error-free, especially in China and the APAC regions, as per clients' feedback
- Clients mention that sometimes they face challenges when it comes to integration with existing clinical systems and/or wearables and sensor devices

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 appreciate Medidata Solutions for the quality of its resources related to software, technology, and domain expertise around running DCTs
- Clients mention that Medidata Solutions has good project management capabilities and that project managers and the team stay with clients throughout the duration of the project
- Its partnership with Circuit Clinical will standardize site operations, increasing the ease-of-use for its platforms, expanding access to clinical trials, and enhancing its domain expertise across multiple therapy areas
- Medidata Solutions sensor cloud looks to integrate and standardize sensor data from disparate sensors and unify reporting from a single data platform
- Its solutions are rated highly on governance, security, and compliance – clients have reported no issues with security or any data breach











Limitations

- The EDC solution has high brand recall among enterprises as compared to the DCT solutions, reducing some enterprise mindshare in the DCT ecosystem
- Clients mention that the eCOA solution can be improved – better programming and testing to reduce system bugs, include all the standard reports, and shorten the patient guide. Overall clients desire the eCOA solution to be as mature as the EDC module
- Clients mention that sites face complications during data entry, and patients go through multiple logins to reach the screening page. Clients desire a simplified experience with single sign-on and a user-intuitive DCT solution
- Its price points have been deemed to be higher than other providers in this space
- Clients expect Medidata Solutions to reduce timelines on study build and migrations with quicker setups and smoother applications – making it easy to handle for patients

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 provides an end-to-end SaaS platform with workflow automation, creating a unified experience for all users – patients, sites, and sponsors
- Clients appreciate the team for its expertise in DCT technology, enabling a smooth transition for enterprises new to this landscape
- It offers a user-friendly platform (website) with easy navigation and intuitive UI complemented with appreciable patient assistance for platform-related issues
- The provider is competitively priced and flexible during negotiations
- Science 37 has a wide partnership network including technology providers, CROs, and academic institutes
- Clients mention that it is challenging to find suitable patients for rare disease trials and appreciates Science 37’s efforts in meeting the expected timelines for patient enrollment











Limitations

- It can look to improve its domain expertise in multiple therapy areas and develop consultative abilities to advise clients on how to decentralize trials
- Some clients mention that the platform took longer to get started and running as compared to the expected timelines set by the Science 37 team
- Clients mention that the mobile application needs improvement as it frequently crashes and has an inefficient notification system
- Clients quote that Science 37 can improve on its market education initiatives and bring in robust change management support for seamless adoption

THREAD

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

- THREAD offers a unified platform with an integrated data layer. It also offers auxiliary services (such as recruitment, concierge, and home health services) through partnerships, creating an end-to-end DCT platform offering
- Clients share that the platform comes with multiple pre-included device integrations with wearables accelerating the study build timelines
- It is rated high for its technical and domain expertise, training and educational content, and project management abilities, resulting in superior customer interactions
- Clients appreciate the investments made toward the usage of next-generation technology, for example, acquisition of InVibe for voice analytics and usage of AI/ML models to understand skin health
- Clients state that the enterprise-level deals increase the confidence in the scalability and maturity of the DCT platform

Limitations

- Clients mention that the user interface and navigation of the patient-facing application can improve. Patients are spending a lot of time understanding and coming to speed with the platform
- Sites are facing challenges with specific products such as eCOA/ePRO. They desire to have simplified operations – fewer clicks for report generation, easier navigation, and better guidance
- It should look to increase the strength of its client-facing people from both sales and delivery perspective
- Clients state that the solutions are priced higher than competitors

03

Enterprise sourcing considerations











- Major Contenders

- Alira Health
- Castor
- Clario
- Clinical ink
- CliniOps
- Clinpal
- Crucial Data Solution
- Curebase
- Delve Health
- IQVIA
- Labcorp Drug Development
- Medrio
- ObvioHealth
- Signant Health
- Viedoc Technologies

Alira 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

- Alira Health offers a user-friendly and intuitive platform with easy navigation and flexible customizations. Clients mention that all stakeholders have a consistent experience with the platform
- Clients rate Alira Health high for its integration capabilities with external systems and devices - wearables, sensors, and chatbots
- It is part of multiple patient advocacy organizations across different therapy areas, enhancing its domain knowledge and insights into patients' challenges and expectations
- It is adaptive to client requirements and brings in good support services











Limitations

- While integration with external devices is smooth, clients have faced challenges in transferring data to the eCRFs from its platform
- It can look to partner with specialist providers to offer auxiliary support services (beyond home nursing) to enhance the end-to-end DCT play
- Clients desire more training and change management support from Alira Health (for patients and sites), increasing the ease of use for its solutions
- Its patient recruitment and televisit solutions have lower adoption compared to the other solutions

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 the speed of eConsent build and integrating this with existing EDC solutions, resulting in a reduction in trial timelines
- Castor has partnered with providers for patient recruitment (Trialbee and 1nhealth) and home health testing (Let's Get Checked and ixLayer), strengthening its play in the delivery of auxiliary services, enhancing the value proposition for an end-to-end DCT solution
- It is responsive and offers quick resolutions to queries. Clients appreciate the training provided for patients and sites to increase usability and adoption
- Castor has strong expertise and previous experience to run Software-as-a-Medical Device (SaMD) trials on its suite of products
- Clients mention that Castor has a very competitive pricing model and is always flexible in incorporating the desired features and customizations











Limitations

- Clients cite that the solutions (eConsent and EDC) need some improvement on the UI/UX front – they desire a single login across solutions and better visualization (font size and color palette) to enhance the readability and usability of these solutions
- Clients mention that extracting and exporting data using API is limited to metadata while they desire to have project progress data as a standard feature with easy accessibility all the time
- Clients cite that there is room for improvement in the analytics and next-generation tech-related offerings. They also note that Castor has taken efforts in this direction, planning to add advanced analytics features in the future releases
- Its remote patient monitoring solution has lower adoption compared to similar solutions from competitors in this space

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

- Clario has good expertise in eCOA solutions and is capable of handling complex requirements across various therapeutic areas
- It enhances RWE by integrating RWD from multiple sources and leverages AI for predictive analytics, improving on its AI capabilities for imaging solutions with the recent acquisition of Saliency
- Clients rate Clario highly for its domain knowledge and support services, and appreciate it for meeting project timelines
- Clients mention that it has good APIs (develops custom ones as well) to manage integrations with existing or third-party systems
- Its solutions are competitively priced and result in cost savings











Limitations

- Clario can look to partner with niche providers to offer clients access to auxiliary support services in DCTs
- While clients desire a shortened device training schedule and better change management capabilities, they acknowledge that it is making efforts in the right direction
- Its virtual visit solution is comparatively new; clients expect it to improve (majorly UI/UX) and be at par with the leading solutions in this space
- Clients expect Clario to improve its dashboarding and reporting capabilities with more standardized and user-intuitive reports, KPIs, and queries

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

- Clinical ink offers its platform as an eSource solution that facilitates Direct Data Capture (DDC) from patients supporting complex workflows and a unified data repository
- Clients appreciate its deep expertise in designing eCOA solutions and its ability to handle complex eCOA requirements
- It has been rated highly for the flexibility of its platform, responsiveness to queries, and agility in solution delivery
- Clients have rated Clinical ink highly on domain expertise across multiple therapy areas. It is well-versed in clinical operations and their complex nuances
- It is focusing its investment efforts on leadership hiring to improve product portfolio and improve patient experience











Limitations

- Clinical ink is perceived as a premium-priced provider
- It can look to refine the existing products – leveraging AI/ML capabilities to automate processes and increase efficiency (for example, capturing data through voice and incorporating voice analytics)
- It can look to bring in the right mix of business- and technology-focused people during deal solutioning. This would reduce gaps between client requirements and tech feasibilities, avoiding unnecessary confusion and delays
- Clients desire better support at the site level to increase adoption while the platform can look to improve on the reporting and visualization capabilities at the sponsor end
- While clients appreciate the helpdesk support for sponsors, they expect the support services to be more responsive and prompt for patients and sites

CliniOps

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 cited that CliniOps’s platform is seamless for data movement and operates smoothly
- Pre-configured settings of the platform allow clients to run a trial without building the platform from scratch, saving time
- Clients believe that CliniOps is a flexible platform and accommodates changes on the go and has good responsiveness in terms of conveying the updates
- UI/UX of the platform is rated good and has a separate platform for patients (Connect) and site (Edge)











Limitations

- The majority of the client base is based out of North America and has a little presence in the European and APAC markets, which can be expanded
- It can improve the ability to have support relationships in every time zone as clients faced some challenges in terms of time zone difference and on-time support
- CliniOps currently lacks the medication adherence capabilities and can look at developing a solution around this

Clinpal

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

- Clinpal has good experience in conducting DCTs (Clinpal platform) across therapy areas in a wide range of geographies
- It is responsive to client feedback, requests, and suggestions – co-developing with the clients, designing and implementing tailor-made solutions
- It has partnered with providers, such as Patient RM, MRN, and Cambridge Cognition, to augment the delivery of auxiliary services (patient concierge, home nursing, and logistics)
- Clients appreciate the face time with senior leadership and commend Clinpal for its expertise on clinical regulations and proactive problem-solving abilities











Limitations

- Clients desire improvements on the UI/UX of the Clinpal platform, expecting it to become more user-intuitive and sophisticated
- Clients cite difficulties when it comes to integration with existing systems or other third-party platforms
- While clients acknowledge its efforts around query resolution, they expect it to increase the team size for smoother, faster, and uninterrupted support services
- Clients desire more out-of-the-box solutions from Clinpal, requiring minimal customizations, so that they can reduce study timelines

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 an end-to-end platform (TrialKit) capability for conducting both hybrid and fully-decentralized trials
- Clients mention that it leverages emerging tech solutions in its platform, for example, AI to unearth insights from unstructured data, blockchain for security and compliance, and OCR for reading data from pdfs
- It is adaptive to client requirements, provides quick resolutions of support issues, and ensures that clients have enough face time with senior leadership
- Clients appreciate the speed of study build with the TrialKit platform; accelerated by the pre-built templates and existing libraries
- Its mobile-native (not a rendered version of the website on mobile) application is easy to customize and is rated high on ease of use for patients and site users











Limitations

- It can look to visually enhance the platform. Clients desire an attractive and intuitive user interface for the platform
- Clients mention that it can augment platform capabilities by enabling data extraction and integration from additional sources
- While clients acknowledge that it does a good job with change management, sometimes it becomes difficult to roll out a change on all the platforms (iOS and android)
- It can look to improve the content of the help topics and explanations on the patient app. Clients mention that sometimes patients find them to be ambiguous and generic

Curebase

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

- Curebase tries to adopt an end-to-end approach by offering its own technology products while partnering for some of the auxiliary services (mobile nursing and patient recruitment)
- Clients mention that it has a better understanding of the digital health and therapeutics (DTx) space as compared to some of the large CROs
- It has been rated highly for its support services, project management abilities, and competitive pricing models that have resulted in cost savings for clients
- Clients mention that they saw a very low patient drop-out rate compared to traditional trials after adopting Curebase solutions











Limitations

- Clients mention that they faced challenges while implementing the solutions, especially while integrating wearables and sensors with the Curebase platform
- While patients had a good experience with the platform, sites and sponsors experienced performance lags and difficulties in extracting large data sets, and expect Curebase to improve the reporting capabilities
- Clients mention that Curebase lacks domain expertise but also appreciate the fact that it is putting efforts into building that expertise
- It can look to increase partnerships to offer the complete array of auxiliary support services, strengthening the value proposition of an end-to-end DCT solution

Delve 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

- Delve Health has partnerships for in-home nursing and patient screening to provide auxiliary support services to clients
- It has a good solution for integrating the wearables and pulling data from multiple providers
- It provides more detailed eCOA outcomes by providing capabilities to measure ePerfO, eClinRO, and eObsRO
- It has good domain expertise when it comes to serving medical device clients











Limitations

- It does not have adequate capabilities for patient recruitment and medication adherence, some of which has been launched recently
- Clients cited a few challenges in terms of on-time support due to less bench strength of the people on the project
- Delve Health can look at incorporating multilingual capabilities to cater to diverse clients as well as a different section of the population across the globe
- Currently it lacks the expertise specific to life sciences clients in broader therapeutic areas such as Oncology and respiratory diseases, and focuses more on the medical devices space

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 orchestrates decentralized trials through its Orchestrated Clinical Trials (OCT) suite, which is a wide combination of technology products and auxiliary service offerings
- It leverages its CRO heritage to gain enterprise mindshare and can support clients in conducting DCTs globally across multiple therapy areas
- It has made good investments around data analytics, BI, AI, ML, and emerging tech capabilities through the Clinical Data Analytics Suite (CDAS) offering
- Clients have appreciated the responsiveness of IQVIA’s 4-tier support model
- It has good domain expertise and engages in consultative activities, helping clients with trial designs











Limitations

- IQVIA’s CRO heritage sometimes creates skepticism in enterprise minds about its abilities as a DCT platform provider
- Clients mention that the user experience of the product suite can improve. While it is well-designed, it keeps crashing, is slow, and clunky
- Clients cite challenges with the software updates – often come with glitches and are time-consuming to correct and implement

Labcorp Drug Development

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

- Labcorp takes an end-to-end approach by offering tech products through the snapClinical® DCT Platform and auxiliary services through its CRO heritage
- Its partnership with Circuit Clinical provides access to a wide network of physicians and clinical research professionals, accelerating the adoption for DCT solutions
- It brings in gamification with the DCT platform to increase patient engagement in clinical trials
- Clients appreciate the support services for patients and sites – both for technical requirements and clinical protocol-related issues











Limitations

- The CRO heritage and a heavy focus on services might eclipse its capabilities as a DCT platform provider
- It has limited thought leadership content or consultative capabilities to help clients design and deploy decentralized trials
- It can look to focus on leadership hiring to improve product portfolio and patient experience

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

- Medrio has an intuitive, easy to set up, and easy-to-use platform. Clients mention that sponsors and sites could use the solutions with little product or tech knowhow
- Clients appreciate Medrio for its responsive support services and the practice of continuously upgrading its products based on end-user feedback
- Its price points are competitive and transparent, and clients have realized cost savings in the engagements
- It has an online customer community where end users can connect, share feedback, and gain access to product knowledge and educational materials











Limitations

- Clients mention that the platform is not DCT-native (rather designed for on-site data collection and has been tweaked to accommodate decentralized trials); hence, patients' experience is not smooth and seamless, causing a delay in patient recruitment
- It can look to improve the UI/UX on the ePRO platform. Patients often find the instructions ambiguous and mention interface inconsistencies between sections
- Clients desire more flexibility on the ePRO platform (easily customizable forms) and lesser time for the overall database build
- Clients expect Medrio to improve its dashboarding and reporting capabilities with more standardized and user-intuitive reports, KPIs, and queries

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 has good knowledge and expertise in the consumer health industry. Clients mention that they do not adopt a tech-first approach but bring in business-oriented focus during deal solutioning
- Clients appreciate the speed of study built and the time taken to start patient recruitment. This has resulted in a significant reduction in trial timelines
- It is appreciated for its responsiveness to queries, project management abilities, and CRO services such as regulatory support
- While it focused on the APAC market during the initial days, clients now acknowledge its efforts in conducting global studies
- It has been rated high on the user experience of its products and solutions along with its training modules and services











Limitations

- While it is responsive to queries, clients mention that implementing new changes can become faster and more streamlined
- Some clients cite difficulties while exporting data from ObvioHealth’s system to their existing clinical development platforms
- It can improve on its speed of delivery as clients expect that the speed of operations should match the client governance expectations and that the results are communicated on time
- The patient screening process can become more robust and secure, preventing pretentious participants from taking part in trials. Clients acknowledge that ObvioHealth is already working on this

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

- Signant offers a unified DCT experience through the SmartSignals platform suite (eConsent, eCOA, telemedicine, RTSM, analytics, and consulting services)
- The eCOA solution comes with an easy, drag-and-drop feature to build the workflows, requiring no/minimal programming, and supports multiple languages
- Clients rate Signant highly on the user experience, security, and privacy of the platform
- It offers a patient-friendly, intuitive, and easy-to-use eCOA solution complemented with quality educational content
- It is rated high on security and privacy. Clients mention that the platform meets all regulatory and compliance standards











Limitations

- Clients mention that sites often face difficulties with the platform as it requires separate logins for the individual modules, missing on single sign-on feature
- Clients desire that Signant expand its domain expertise to a broad range of therapy areas and mention that they are moving in the right direction with the centers of excellence and industry memberships (like DTRA)
- It can improve its change management capabilities, communicating the right timelines, and enhancing its training modules to enable a smooth transition for clients
- It has a CRO partner program but can expand its partnerships with service providers for providing auxiliary services

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

- Viedoc Technologies has a user-friendly system and good UI/UX design as cited by clients
- It is competitively priced as the license fee is acceptable as per their clients
- The setup time of the platform for decentralized clinical trials is less
- Good at change management by providing all the necessary guidance for the execution
- Platform supports 35 different languages for connecting the diverse patient population

Limitations

- It can develop a good technology solution for eSignature that is accepted by authorities
- It only provides tech solutions and not services and can look at partnering with service providers to provide auxiliary services
- It can improve on building the social media presence, and patient and sponsors education via frequent webinars, podcasts, conferences, blogs, etc.
- It can look at increasing the mindshare for pharma enterprises beyond med tech and consumer health

03











Enterprise sourcing considerations

- Aspirants
 - Aparito
 - Bloqcube
 - Jeeva
 - REDCap Cloud
 - YPrime

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 the clinical trial platform that offers video assessments, PROs, telemedicine, EDC, and eConsent, all via one smartphone app
- Aparito covers clients from biotech, pharmaceutical, CROs, and academic groups
- It incorporates computer vision, image & signal processing, and time-series analyses combined with machine learning to generate clinical data analysis











Limitations

- Aparito does not provide the capabilities for patient recruitment and medication adherence
- It can partner for auxiliary services, such as home nursing, and patient concierge, as it currently provides only tech capabilities
- It needs to improve market awareness through webinars, conferences, summits, blogs, etc.
- Thought leadership can be improved as other major players in the space are building a brand image via various forums and expertise on board

Bloqcube

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

- Bloqcube offers remote trial participation, data collection, monitoring (via BYOD), and the proprietary C2TA™ module for tracking resource consumption and financial spends
- Clients appreciate Bloqcube for its investment in technology – using audio for consent process, blockchain to enhance data integrity and security, enabling recommendation systems based on machine learning, etc.
- It is rated high for the user experience of the platform – smooth UI, easy navigation, and seamless integrations – with existing software and third-party applications
- Clients appreciate Bloqcube for its responsiveness in query resolutions











Limitations

- Bloqcube can look to develop in-house solutions for patient screening and enrollment, medication adherence, and telehealth
- Presently, it does not offer all the auxiliary support services, such as home nursing, patient concierge, and medical review services, which are valuable to run DCTs
- It can look to partner with CROs and SIs for geographic expansion beyond the North American region
- It should augment efforts around market education (for patients, sites, and sponsors) beyond the regular training sessions (certifications, webinars, and podcasts)

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 offers eClinical Cloud – an integrated and modular platform for conducting decentralized trials
- Clients rate Jeeva highly on domain knowledge, especially in the field of rare diseases and genetic disorders
- It has partnered with CROs (Metflux, Farmacon, and Actu-Real) for expanding its geographic reach into the APAC and LATAM regions
- It offers an easy-to-use platform and clients mention that patients with mid/low levels of digital literacy can use the solutions seamlessly
- Clients appreciate its competitive pricing models and responsive customer service











Limitations

- Jeeva can enhance the user experience by improving the UI/UX of the solutions and allowing clients to easily customize the ICFs without going through the lengthy process of programming and enabling the function
- It can look to bring in open APIs to enable smooth integrations with wearables and sensors
- While clients appreciate its expertise on rare diseases, they desire Jeeva to build domain knowledge on therapy areas beyond rare diseases
- The patient enrollment, televisit, and adherence solutions are new compared to its other solutions and has limited maturity and brand recall

REDCap Cloud

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

- REDCap Cloud uses Redcap’s technology suite, which is good in maturity for clinical data aggregation, reporting, and dashboarding
- It has a unified data management cloud-based platform integrating eConsent, EDC, eCOA, and ePRO modules in a single place
- It works with a diverse set of clients such as academic research centers, non-profit organizations, and government agencies











Limitations

- It can look to expand its relationship with core pharmaceutical enterprises or CROs along with the existing client base
- REDCap Cloud does not have adequate capabilities for medication adherence and wearable integration
- It can build partnerships to provide patient concierge services and other auxiliary services along with DCT tech capabilities

YPrime

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

- YPrime provides eClinical consulting and statistical consulting to their life sciences customers for clinical trial design and analysis
- It provides a summary view of data for better-summarized insights and its data science team works on building such insightful dashboards
- It provides strong eCOA capabilities in addition to advanced analytics

Limitations

- It lacks the adequate capabilities for managing televisits and telemedicine along with patient recruitment
- Advanced analytics use cases are applicable only in the case of eCOA that can be expanded to other DCT capabilities
- It does not have partnerships with CROs or auxiliary service providers such as home nursing

04

Appendix

- Glossary

NOT FOR EXTERNAL USE

Glossary of key terms used in this report

AI	Artificial Intelligence is the simulation of human intelligence and decision-making capability by machines
Aspirants	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
BYOD	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
CRO	A Contract Research Organization is an organization that provides research services to firms in the life sciences industry on a contract basis
DCT	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
eCOA	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
eConsent	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
ePRO	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
IoT	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
ITS	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
Leaders	Leaders are the highest rated platform providers, according to Everest Group's proprietary scoring methodology, with top-quartile performance across market success and capability
LS	Life Sciences – Everest Group defines the life sciences industry to include organizations in the fields of pharmaceuticals, biotechnology, and medical devices
Major Contenders	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
Televisits	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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