

Decentralized Clinical Trial Product Vendor Compendium 2021

August 2021: Complimentary Abstract / Table of Contents



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Tracking: service providers, locations, risk, technologies

Locations: costs, skills, sustainability, portfolios

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Background of the research

Decentralized Clinical Trials (DCTs), in which clinical trial data is collected through sensors or remote monitoring devices carried by a patient without the need to visit a site, can deliver many benefits to pharmaceutical companies, including cost savings, better patient recruitment and retention, 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. In recent times, DCTs have proved to be a saving grace to restart paused clinical trials. Additionally, recent technological advances, the proliferation of wearables, and FDA's push to the industry to adopt DCTs following the COVID-19 situation have made the DCT landscape ripe for disruption.

Numerous start-ups that address DCT requirements have recently emerged. The landscape has also experienced heavy fundraising and M&A activity. Through co-innovation, continuous product improvement, and market education, DCT vendors are focusing on increasing trust, speeding trial timelines, and delivering a smooth experience in running DCTs.

In this report, we assess the capabilities of 15 IT vendors specific to decentralized clinical trial products. These vendors are mapped on the Everest Group PEAK Matrix®, which is a composite index of a range of distinct metrics related to a vendor's capability and market impact. We focus on:

- The landscape of vendors for decentralized clinical trial products
- Assessment of the vendors on several capability and market success-related dimensions

Scope of this report:



Geography
Global




Industry
Life sciences (biopharmaceuticals, medical devices,
and Contract Research Organizations or CROs)

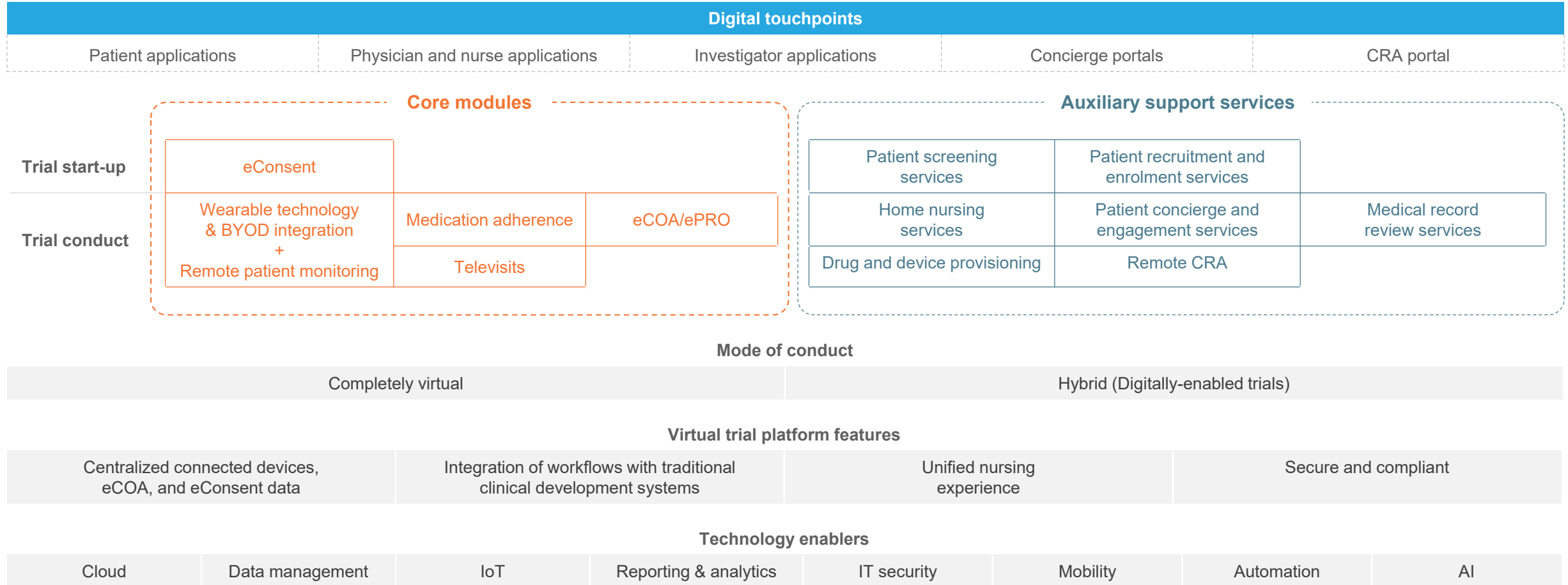


Vendor offering
Decentralized clinical trial products

Decentralized clinical trial products | Scope of the research

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

 Scope of assessment



Source: Everest Group (2021)

The decentralized clinical trial product vendor compendium has over 15 DCT product vendor profiles

Decentralized Clinical Trial Product Vendor Compendium 2021

XXX | decentralized clinical trial products profile (page 1 of 6) Everest Group assessment – Major Contender

Measure of capability: ● Low ● High



Strengths

- XXX's acquisition of YYY augments its DCT capabilities, and offers clients products from YYY and auxiliary services owing to XXX's CRO heritage
- YYY also provides clients additional capabilities such as patient randomization, patient diaries, BYOD support, and reporting and insights
- YYY has partnered with vendors such as Actigraph and Clincloud to augment remote patient monitoring capabilities for its products
- YYY focuses on deploying solutions faster and at lesser cost as compared to traditional solutions, thus allowing sponsors and CROs control of their delivery timelines

Limitations

- YYY's products are point solutions, and not an end-to-end solution
- XXX or YYY has limited thought leadership content on clients decentralize their clinical trials or provide insight case studies or success stories about its work with clients
- There are limited capabilities to check for patient adherence

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Decentralized Clinical Trial Product Vendor Compendium 2021

XXX | decentralized clinical trial products profile (page 2 of 6) Overview

Company mission/vision statement for decentralized clinical trial products

Decentralized clinical trial products are disrupting the life science ecosystem with the next generation of powerful self-service clinical science solutions. They are a single platform for any device, mobile, cloud, and operating system.

Therapy area coverage

XXX's decentralized clinical trial products cater to multiple therapy areas including oncology, women's health, and diabetes.

Overview of the client base

Through its acquisition of YYY, XXX serves pharma and medical device companies in their DCTs. There are no publicly listed clients available.

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NOT EXHAUSTIVE
■ High (>25%) ■ Medium (10-25%) ■ Low (<10%)



Decentralized clinical product offerings

eConsent	Available
eCOA/ePRO	Available

Decentralized Clinical Trial Product Vendor Compendium 2021

XXX | decentralized clinical trial products profile (page 5 of 6) Features of key offerings

NOT EXHAUSTIVE
□ Available □ Not available

eConsent features	Medication adherence	eCOA/ePRO features	TeleVisits	Remote patient monitoring and integration with wearables/BYOD
Multi-lingual eConsent	Available to download on patient phone; Android/iOS support	ePRO functionality	EHR-/EMR-agnostic	Overview dashboards and analytics capabilities
Available to download on patient phone; Android/iOS support	Weekly reminders	Question builder and analytics tools	Text, email, and appointment scheduling features	Data authentication and accuracy features
Reconsent capabilities	Facial recognition	Visualization functionality	Screening tools	Data management capabilities
Multimedia support (audio, video, etc.)	Sensor integration	Available to download on patient phone; Android/iOS support	Available to download on patient phone; Android/iOS support	Integration with multiple wearables such as phone and glucometers
Dedicated dashboards and visualization tools		ePerFO, eClinRO, and eObsRO capabilities	Usage analytics	

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Research calendar

Life Sciences IT Services

Published
 Planned
 Current release

Flagship reports

Release date

Clinical Development Platforms – Vendor Landscape with Products PEAK Matrix® Assessment 2020	September 2020
Clinical Development Platforms – Vendor Provider Profiles Compendium	October 2020
Clinical Development Platforms Market Overview	November 2020
Life Sciences Digital Services – Service Provider Landscape with PEAK Matrix® Assessment 2021	December 2020
Life Sciences Digital Services – Service Provider Profiles Compendium	February 2021
Veeva Services PEAK Matrix® Assessment 2021	March 2021
Veeva Services – Service Provider Profiles Compendium	May 2021
Veeva Services Market Overview	July 2021
Decentralized Clinical Trial Products PEAK Matrix® Assessment 2021	July 2021
Decentralized Clinical Trial Product Vendor Compendium 2021	August 2021
Connected Medical Device Services - Service Provider Landscape with PEAK Matrix® Assessment 2021	Q3 2021

Thematic reports

Release date

Effective Value-Based Contracting in Life Sciences	February 2020
Regulatory Overhaul of the EU Medical Device Market	April 2020
Future Readiness of Life Sciences Enterprise Supply Chains	June 2020
Connecting Life Sciences Manufacturing Using Industrial IoT	March 2021

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