

Decentralized Clinical Trial Platforms Provider Compendium 2023

December 2022: Complimentary Abstract / Table of Contents



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Benchmarking

Contract assessment

Peer analysis

Market intelligence

Tracking: providers, locations, risk, technologies

Locations: costs, skills, sustainability, portfolios

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Introduction

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 Decentralized Clinical Trial Platforms PEAK Matrix® Assessment 2023](#), 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

The decentralized clinical trial platforms provider compendium has over 24 provider profiles/buyer case studies/architecture of the survey questionnaire, etc.

Decentralized Clinical Trial Platforms Provider Compendium 2023

Provider | decentralized clinical trial platforms provider profile (page 6 of 6)
Recent developments

Event/company name	Type of event	Details
Event 1	Investment	Invested in XX, as participants who n
Event 1	Acquisition	Acquired XX, a m acquisition extend
Event 1	Acquisition	Acquired XX, an d its XX offering to g improving patient
Event 1	Acquisition	Acquired XX, a m
Event 1	Acquisition	Acquired XX, a la institutions, and c and clinicians to s
Event 1	Industry Alliance	XX joined an allia
Event 1	Partnership	XX is the XX of th decentralized clin

Decentralized Clinical Trial Platforms Provider Compendium 2023

Provider | decentralized clinical trial platforms provider profile (page 5 of 6)
Features of key offerings

eCOA/ePRO	ePRO functionality
eConsent	Multi-lingual eConsent
TeleVisit	EHR/EMR-agnostic
Trial participant recruitment	Social media campaigns
Remote patient monitoring and integration with wearable technology & BYOD	Overview dashboards and analytics capabilities
Medication adherence	Available to download on patient phone (BYOD format), Android/iOS support

Decentralized Clinical Trial Platforms Provider Compendium 2023

Provider | decentralized clinical trial platforms provider profile (page 4 of 6)
Offerings

Solution	Details
Product 1	A platform which is enabled direct
Product 2	A platform that is based on electro remotely in a web-based BYOD m
Product 3	A HIPAA-compliant, secure two-w patients access without having to
Product 4	A sensor cloud which provides dat
Product 5	A solution which is based on XX w live two-way interaction between s
Product 6	A solution which supports Direct-t ship study drug and supplies direc
Product 7	A solution which review provides s Associates (CRAs) to work remote

Decentralized Clinical Trial Platforms Provider Compendium 2023

Provider | decentralized clinical trial platforms provider profile (page 3 of 6)
Case studies

Case study 1 Accelerate clinical development to bring a vac

Business challenge
The client wanted to accelerate clinical development to bring a vaccine to also wanted to collect data of 30,000 participant with remote data capture capabilities.

Solution
Leveraged eCOA for pre-built instruments, XX for capturing direct patient reported outcomes (ePRO), Safety Gateway to automate AE & SAE data into the sponsor safety system and to eliminate multiple data entry and SI improve patient safety, and save time, Trial Assurance to consolidated al report. Insights from the report enable the sponsor to take preventative a data anomalies, procedural deviations, and other issues.

Impact
The engagement helped in 1200% faster delivery of vaccine to the public

Decentralized Clinical Trial Platforms Provider Compendium 2023

Provider | decentralized clinical trial platforms provider profile (page 2 of 6)
Overview

Company mission/vision statement for decentralized clinical trial pla
XX's vision is to power smarter treatments and healthier people. XX's str technologies through the patient cloud and the XX platform on top of clinic begins with a foundational layer of a unified platform of tools that connect partners access to the broadest set of clinical trial data available in the inc

Overview of the client base
XX has been involved in XX decentralized clinical trials that capture some from patients outside of a site visit. This collective effort has touched over 50 sponsors (including all the top 10 pharmaceutical companies and all th disease TAs, countries, languages and clinical trial phases of research.

Decentralized Clinical Trial Platforms Provider Compendium 2023

Provider | decentralized clinical trial platforms provider profile (page 1 of 6)
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 XX for the quality of its resources related to XX, XX, and XX around running DCTs
- Clients mention that XX has good project management capabilities and that project manager and the team stay with clients throughout the duration of the project
- Its partnership with XX 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
- XX looks to integrate and standardize sensor data from disparate sensors and unify reporting from a single data platform
- Its solutions are rated highly on XX – clients have reported no issues with XX

Limitations

- The XX solution has high brand recall among enterprises as compared to the XX solutions
- Clients mention that the XX solution can be improved – better programming and testing
- Clients mention that XX face complications during data entry, and patients go through multiple logins to reach the screening page
- Its XX have been deemed to be higher than other providers in this space
- Clients expect XX to reduce XX with quicker setups and smoother applications – making it easy to handle for patients

1 All the revenue components add up to a total of 100%
2 Based on analyst estimates

Decentralized Clinical Trial Platforms Provider Compendium 2023

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Research calendar

Life Sciences Information Technology

Published Planned Current release

Reports title	Release date
Increasing Diversity in Clinical Trials	October 2020
Clinical Development Platforms Market Overview	November 2020
Veeva Services PEAK Matrix® Assessment 2021	March 2021
Veeva Services Market Overview	July 2021
Decentralized Clinical Trial Products PEAK Matrix® Assessment 2021	July 2021
Decentralized Clinical Trial Products Market Overview	September 2021
Decentralized Clinical Trials Adoption Playbook	December 2021
Accelerating the Value of Data in Life Sciences	January 2022
Clinical Development Platforms Products PEAK Matrix® Assessment 2022	July 2022
Remote Patient Monitoring (RPM) in Decentralized Clinical Trials (DCT)	November 2022
Decentralized Clinical Trial Platforms PEAK Matrix® Assessment 2023	November 2022
Decentralized Clinical Trial Platforms Provider Compendium 2023	December 2022
Preparing the Landscape for the Next-gen Decentralized Clinical Trials (DCT)	Q4 2022
Life Sciences Decentralized Clinical Trial Products – State of the Market	Q1 2023
Increasing Site Preparedness for Implementing Decentralized Clinical Trials	Q2 2023

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