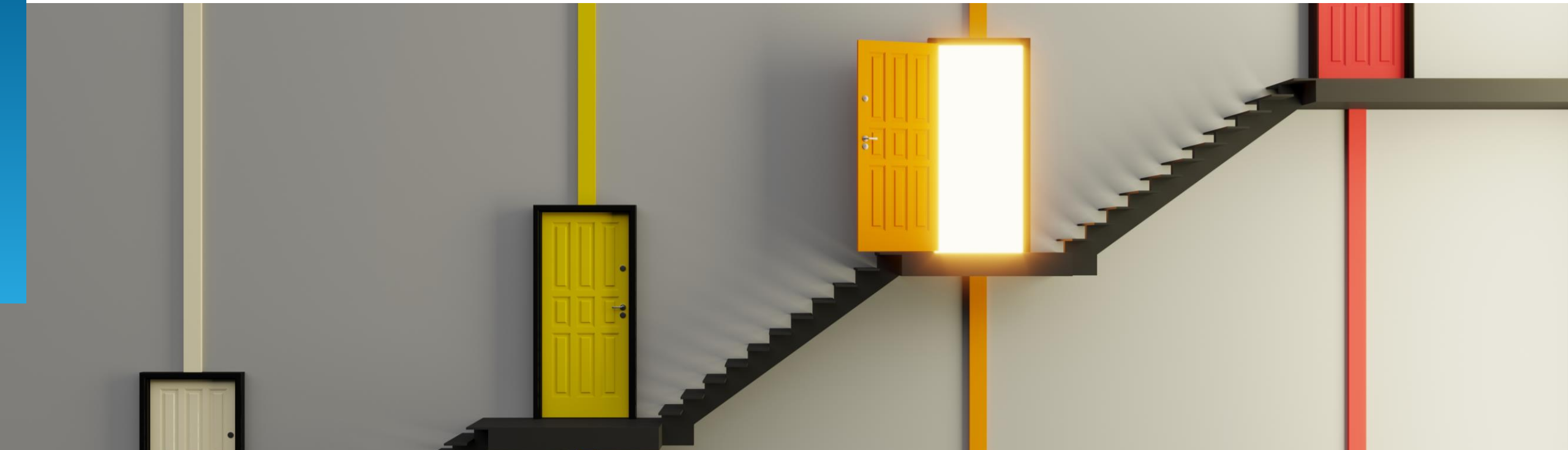


Decentralized Clinical Trial Platforms – Provider Compendium 2024

February 2024: Complimentary Abstract / Table of Contents



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This report is included in the following research program(s):

Clinical Development Technology

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- ▶ Retirement Technologies
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- ▶ Rewards and Recognition
- ▶ SAP Services
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Introduction

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.

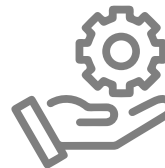
This report includes the profiles of the following 22 leading DCT platform provider featured on the DCT Platforms PEAK Matrix® Assessment:

- **Leaders:** Medable, Medidata Solutions, Science 37, and THREAD
- **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
- **Aspirants:** Aparito, Cliniv Health Tech, Huma, and Jeeva

Scope of this report



Geography
Global



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



Products
Decentralized clinical
trial platforms

Overview and abbreviated summary of key messages

This report examines the global decentralized clinical trial platform provider landscape and its impact on the DCT market. It focuses on platform providers' position and growth in the DCT market, changing market dynamics and emerging platform provider trends, and assessment of their DCT capabilities.

Some of the findings in this report, among others, are:

Changing market dynamics

- Platform providers are focusing on delivering a seamless hybrid trial experience through investments in real-world evidence generation, data interoperability, efficient data management, and the extraction of meaningful insights from the data
- In a funding-constrained environment, providers are strategically emphasizing client satisfaction, optimizing operational costs, and staying compliant with the regulatory landscape

Emerging platform provider trends

- Providers are streamlining the site experience by offering a unified platform with a single sign on, fostering adoption through training and support, and building collaborations with site networks
- Embracing patient centricity, providers are incorporating patient-centric trial designs, investing in tools for patient engagement and retention, and integrating remote patient monitoring solutions

Platform provider delivery capability

- Decentralized clinical trial platform providers can be categorized into Leaders, Major Contenders, and Aspirants on a capability-market-impact matrix
- Medable, Medidata Solutions, Science 37, and THREAD are the current leaders in the decentralized clinical trial platforms market. However, several platform providers are emerging as major contenders with expertise in areas such as patient engagement or Electronic Data Capture (EDC)

The Decentralized Clinical Trial Platforms Provider Compendium report has 22 provider profiles/buyer case studies/architecture of the survey questionnaire, etc.

Decentralized Clinical Trial Platforms – Provider Compendium 2024

Provider 1 profile (page 1 of 5) Overview

Company mission
Provider 1 is advancing research for everyone, everywhere. Its platform and scientific expertise that transforms research to be wants to strategically evolve the industry via enabling its customer generation research for the next-generation of patients.

Overview of the client base
Company provides services to 15 of the top 20 biopharma companies supported over 500 customers, 3,000 projects, and nearly 250

Decentralized Clinical Trial Platforms – Provider Compendium 2024

Provider 1 profile (page 2 of 5) Case studies

Case study 1 Patient data collection and remote m

Business challenge
The client (a biopharmaceutical company) was developing a n needed seizure data for central assessor endpoint manage and languages and should be compatible with both Android an

Solution
The solution is geared toward providing participants/caregiver a series of eCOA assessments and reduce the overall number capture to be later reviewed by the central rater. Video capture is triggered for seizure events and functional as participant companion mobile application (patient's home enviro within portal for remote central rater review and endpoint asse

Impact
The study solution is enabling early evidence of drug efficacy d can leverage with independent reviewers and authorities for d development.

Decentralized Clinical Trial Platforms – Provider Compendium 2024

Provider 1 profile (page 3 of 5) Offerings

Proprietary solutions (representative list)

| Solution | Details |
|------------|--|
| Solution 1 | All eCO license (i.e. Ma configu future t Modus to add |
| Solution 2 | Platform need to review, the plat Part 11 |
| Solution 3 | Stand health t current track pi that ea compli view h'd also inc |

Decentralized Clinical Trial Platforms – Provider Compendium 2024

Provider 1 profile (page 4 of 5) Features of key offerings

| | |
|---|---|
| eCOA/ePRO | ePRO functionali |
| eConsent | Multi-lingual eCons |
| TeleVisit | EHR/EMR agnost |
| Trial participant recruitment | Social media campa |
| Remote patient monitoring and integration with wearable technology and BYOD | Overview dashboar and analytics capabil |
| Patient engagement | Task list for all stakeh |

Decentralized Clinical Trial Platforms – Provider Compendium 2024

Provider 1 profile (page 5 of 5) Recent developments

NOT EXHAUSTIVE

Key events (representative list)

| Event name | Type of event | Details |
|------------|-----------------------|---|
| XYZ | Partnership | In 2023, company and SAS launched a proprietary offering that enables emerging biopharma and biotech companies to modernize their clinical research in a simple and cost-effective way. |
| XYZ | Partnership | In 2023, company partnered with ROM+ to power a new patient first medical device research offering and enable MedTech clinical research, manufacturers, sites, and patients to unlock the potential for personalized breakthroughs and a future of targeted therapies. |
| XYZ | Alliance | In 2023, The University of Pittsburgh CTSI selected company via a three-year enterprise agreement to accelerate the impact of translational research. This collaboration will empower The University of Pittsburgh CTSI to configure and launch its own studies using the no-code platform. |
| XYZ | Alliance | In 2023, Allucent selected company via a three-year enterprise agreement to power the patient direct trials offering. |
| XYZ | Partnership | In 2023, company and AWS expanded their multi-year partnership with XYZ launching in the AWS Marketplace, simplifying technology procurement for joint customers. |
| XYZ | Product release | In 2023, company launched new AI tools to derive patient insights for research design and retention. |
| XYZ | Alliance | In 2023, United Biosource LLC (UBC) renewed a three-year enterprise agreement with XYZ and jointly launched SitePlus, a flexible solution for fully decentralized, hybrid, and site-based trials. |
| XYZ | Alliance | In 2023, 3H Medi Solution selected company to expand the delivery of decentralized clinical trials in Japan. |
| XYZ | Alliance | In 2023, Sanofi selected XYZ in a five-year enterprise agreement as the sole DCT and eCOA provider to power the Integrated Patient Platform as a part of Sanofi's Act4Patient clinical transformation program as the largest DCT deal to date in the industry. |
| XYZ | Executive appointment | In 2022, Tracy Hervey joined the company Executive Leadership Team as the Chief Commercial Officer. |
| XYZ | Executive appointment | In 2022, Kim Boericke joined the company Executive Leadership Team as the Chief Operating Officer. |
| XYZ | Product release | In 2022, XYZ achieved over 500 researched, built, and pre-validated eCOA in a reusable configurable global library. |

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Research calendar

Clinical Development Technology

■ Published
 ■ Planned
 ■ Current release

| Reports title | Release date |
|--|----------------------|
| 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 |
| Life Sciences Decentralized Clinical Trial Platforms State of the Market 2023 | March 2023 |
| Life Sciences Clinical Data and Analytics (D&A) Platforms PEAK Matrix® Assessment 2023 | July 2023 |
| Life Sciences Clinical Data and Analytics (D&A) – Provider Compendium 2023 | November 2023 |
| A Unified Approach to Clinical Trials | November 2023 |
| Decentralized Clinical Trial Platforms PEAK Matrix® Assessment 2023 – Update | December 2023 |
| Decentralized Clinical Trial Platforms – Provider Compendium 2024 | February 2024 |
| Patient Engagement Trailblazers in Decentralized Clinical Trials | Q1 2024 |
| Decentralized Clinical Trials (DCT) Adoption Playbook | Q2 2024 |
| Life Sciences Clinical Data and Analytics (D&A) Platforms PEAK Matrix® Assessment 2024 | Q3 2024 |
| Life Sciences Electronic Data Capture (EDC) Platforms PEAK Matrix® Assessment 2024 | Q3 2024 |

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