



Everest Group PEAK Matrix™ Assessment for Life Sciences Clinical Trials Products

Focus on Oracle
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Introduction and scope

Everest Group recently released its report titled “[Life Sciences Clinical Trials – PEAK Matrix™ Assessment for Products 2017](#)”. This report analyzes the capabilities of 12 product vendors specific to the life sciences clinical trials products market.

These vendors are mapped on the Everest Group PEAK Matrix, categorizing them into Leaders, Major Contenders, and Aspirants. The PEAK Matrix is a composite framework that provides an objective, data-driven, and comparative assessment of life sciences clinical trial vendors based on their absolute market impact and overall capability.

Based on the analysis, **Oracle emerged as a Leader**. This document focuses on Oracle’s life sciences clinical trials products experience and capabilities. It includes:

- Oracle’ position on the life sciences clinical trials products PEAK Matrix
- Detailed life sciences clinical trials products profile of Oracle

Buyers can use the PEAK Matrix to identify and evaluate different service providers. It helps them understand the service providers’ relative strengths and gaps. However, it is also important to note that while the PEAK Matrix is a useful starting point, the results from the assessment may not be directly prescriptive for each buyer. Buyers will have to consider their unique situation and requirements, and match them against service provider capability for an ideal fit.

Clinical trials products | Background of the research

Background of the research

The life sciences industry is undergoing a fundamental change in their business model. Shift from blockbuster drug model to precision medicine and specialty drugs has disrupted the life sciences ecosystem. Traditionally, drug discovery cycles took three to six years, whereas changed market dynamics demand enterprises to accelerate this cycle and bring it down to three to nine months. Therefore, life sciences enterprises are experimenting with innovative drug discovery models to tackle this situation.

Clinical trials form a key part of this overall transformation. Trial sponsors who earlier relied on Contract Research Organization (CRO) and technology service providers are moving to SaaS-based trial platforms. These platforms are not only agile and nimble, but also user-friendly and flexible. Everest Group's HLS IT research program realizes the change in the market situation and has come up with a research report that addresses this particular need.

In this report, we analyze the capabilities of 12 product vendors specific to the life sciences clinical trials products industry. These vendors 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:

- Market trends in clinical trials
- The landscape of technology vendors for life sciences clinical trials
- Assessment of the vendors on several capability- and market success-related dimensions

Scope of this report

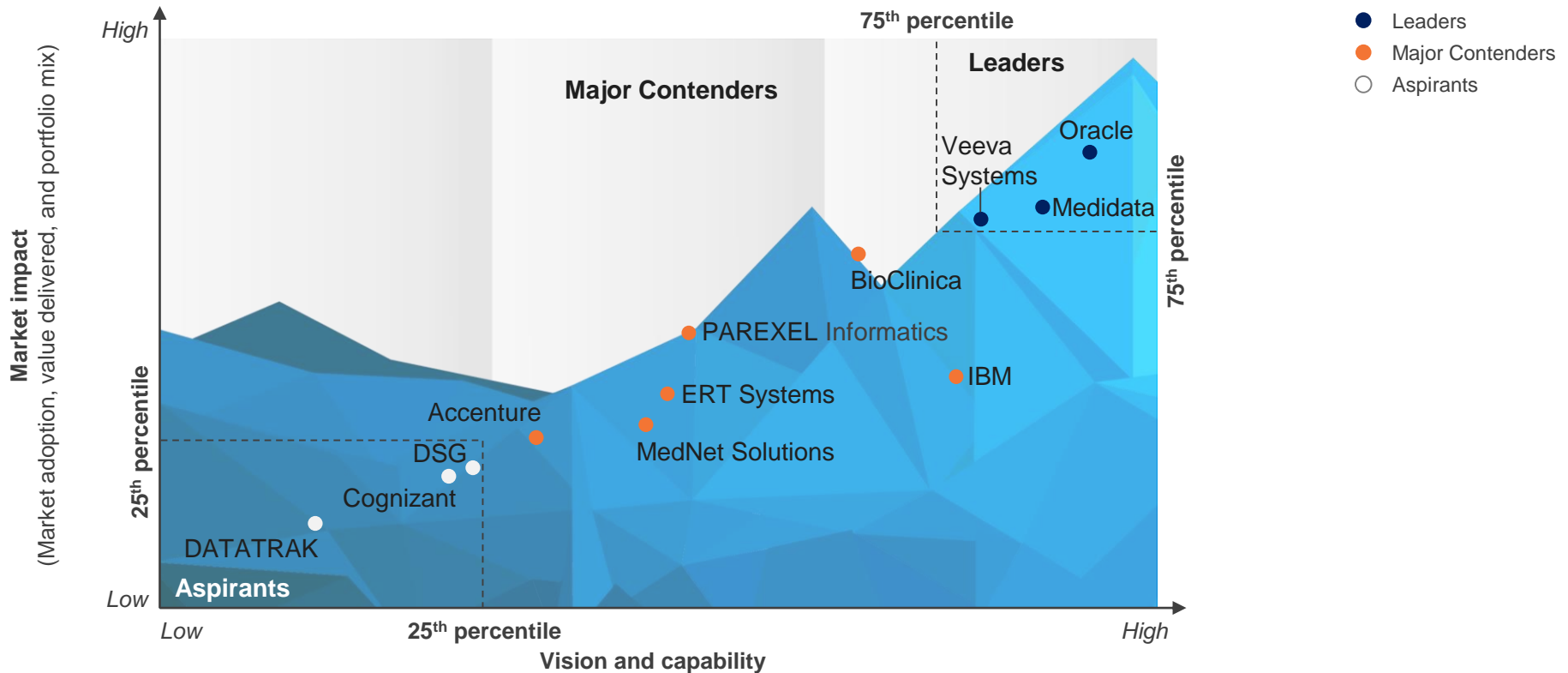
- **Industry:** Life sciences (pharmaceuticals, medical devices, biotechnology, and other life sciences¹)
- **Product:** Clinical trials
- **Geography:** Global

¹ Includes healthcare data & information services and medical products distribution

Everest Group PEAK Matrix™

Life sciences clinical trials products | Oracle is positioned as a Leader

Everest Group PEAK Matrix™ for Life Sciences Clinical Trials Products 2017



(Vision & strategy, functionality, flexibility and ease of deployment, engagement and commercial model, and support)

Note: Assessment for BioClinica, DATATRAK, DSG, Medidata, PAREXEL Informatics, MedNet Solutions, and Veeva Systems excludes service provider inputs on this particular study and is based on Everest Group's estimates, which leverage Everest Group's proprietary Transaction Intelligence (TI) database, ongoing coverage of BioClinica, DATATRAK, DSG, Medidata, PAREXEL Informatics, MedNet Solutions, and Veeva Systems service provider public disclosures, and interaction with buyers

Source: Everest Group (2017)

Everest Group PEAK Matrix™ for life sciences clinical trials products: Characteristics

Everest Group PEAK Matrix™ for life sciences clinical trials products: Characteristics

Leaders: Oracle, Medidata, and Veeva Systems

- Leaders in the clinical trials products space are characterized by their differentiated value proposition, comprehensive coverage, and the high levels of market impact
- Oracle's market messaging around "plug-and-play" systems in combination with horizontal capabilities such as analytics and automation has generated credible market interest among trials sponsors and service providers
- Medidata's flexibility and usability of solutions (alerting, automated workflows, and in-built templates) acts as a key differentiator
- Veeva Systems' strong capability in offering an end-to-end SaaS-based solution across R&D, clinical, and sales & marketing functions is resonating well with their clients
- Leaders have consistently displayed the ability to flex their commercial solutioning, deployment options, and support services based on sponsor requirements

Major Contenders: Accenture, BioClinica, ERT Systems, MedNet Solutions, and PAREXEL Informatics

- Major Contenders have substantial capabilities to deliver stand-alone platforms or add wrapper solutions in the clinical trial technologies market
- Developing customized offerings, improving modular functionalities, and improving market messaging of capabilities are some of the key priorities for these players
- They are also investing in next-generation technology capabilities such as analytics, cloud, and automation to improve end outcomes of clinical trials

Aspirants: Cognizant, DATATRAK, and DSG

- Aspirants are offering point solutions or are in the early stage of developing a comprehensive clinical trial product suite
- They need to expand the range of functionalities and offerings so that they can take up large-scale and complex deployments
- Creating differentiated value proposition for varying customer needs is a key priority for Aspirants

Summary dashboard | Delivery capability and market impact assessment of providers for Clinical Trials products 2017

Leaders

Measure of capability: Best-in-class Very high High Medium high Medium Medium low Low Not mature

| Service provider | Vision and capability | | | | | Market impact | | |
|------------------|-----------------------|---------------|------------------------------------|---------|---------------------------------|-----------------|---------------|-----------------|
| | Vision and strategy | Functionality | Flexibility and ease of deployment | Support | Engagement and commercial model | Market adoption | Portfolio mix | Value delivered |
| Medidata | | | | | | | | |
| Oracle | | | | | | | | |
| Veeva Systems | | | | | | | | |

Source: Everest Group (2017)

Summary dashboard | Delivery capability and market impact assessment of providers for Clinical Trials products 2017

Major Contenders

Measure of capability: Best-in-class Very high High Medium high Medium Medium low Low Not mature

| Service provider | Vision and capability | | | | | Market impact | | |
|---------------------|-----------------------|---------------|------------------------------------|---------|---------------------------------|-----------------|---------------|---------------------|
| | Vision and strategy | Functionality | Flexibility and ease of deployment | Support | Engagement and commercial model | Market adoption | Portfolio mix | Vision and Strategy |
| Accenture | | | | | | | | |
| BioClinica | | | | | | | | |
| ERT Systems | | | | | | | | |
| MedNet Solutions | | | | | | | | |
| PAREXEL Informatics | | | | | | | | |

Source: Everest Group (2017)

Summary dashboard | Delivery capability and market impact assessment of providers for Clinical Trials products 2017

Aspirants

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| Service provider | Vision and capability | | | | | Market impact | | |
|------------------|-----------------------|---------------|------------------------------------|---------|---------------------------------|-----------------|---------------|---------------------|
| | Vision and strategy | Functionality | Flexibility and ease of deployment | Support | Engagement and commercial model | Market adoption | Portfolio mix | Vision and Strategy |
| Cognizant | | | | | | | | |
| DATATRAK | | | | | | | | |
| DSG | | | | | | | | |

Source: Everest Group (2017)



Oracle | Clinical trials products profile

Areas of strengths

- Oracle offers a comprehensive platform for end-to-end clinical trials processes that integrates data across various clinical sites
- It also combines its horizontal capabilities such as hybrid cloud, data visualization, and analytics, while solutioning clinical trials offerings

Clinical trials value chain coverage

■□□ Low ■■□ Medium ■■■ High

| | | | |
|-----------------|-----|--------------------|-----|
| Pre-clinical | ■■■ | Pharmacovigilance | ■■■ |
| Clinical trials | ■■■ | Regulatory affairs | ■■■ |

Client focus segments

■□□ Low ■■□ Medium ■■■ High

| | |
|--|-----|
| Small (annual revenue < US\$1 billion) | ■□□ |
| Medium (annual revenue = US\$1-10 billion) | ■■□ |
| Large (annual revenue > US\$10 billion) | ■■■ |

Areas of improvements

- Oracle needs to reinforce their coherent brand strategy across life sciences offerings, as customers perceive that their current portfolio is complex and has multiple disparate solutions with varied business benefits
- Needs to adopt a flexible commercial model that resonates with mid-market

Geography coverage

■□□ Low ■■□ Medium ■■■ High

| | | | | | |
|----------|-----|--------|------|-----|--------|
| Americas | ■■■ | 40-50% | APAC | ■□□ | 10-20% |
| EMEA | ■■■ | 20-30% | | | |

Overview of client base

Oracle platforms are used by top-20 pharma firms, top-10 medical devices, and top-10 CROs. Key clients include Wyeth, Pfizer, Teva Pharmaceuticals, and Roche.

Overview of capabilities (representative list)

| Capability | Details |
|---|---|
| Randomization and supply management | Capabilities include design, data capture, site and depot management, report generation, and analytics |
| Electronic Data Capture (EDC) | Capabilities include data extraction, loading, and archiving from questionnaires, medical devices, mHealth sources, etc. |
| Data management | Capabilities include data validation, discrepancy testing, data standardization, and data transformation |
| Planning Budgeting Resourcing Tracking | Features include portfolio planning, resource tracking, study budgeting, payments, and regulatory submission and tracking |
| Clinical Trial Management System (CTMS) | Capabilities include site feasibility, trial performance monitoring, vendor management, training, review, eTMF, etc. |
| Risk management | Capabilities include risk assessment, operational key risk indications, and risk and issue management |

Overview of recent developments

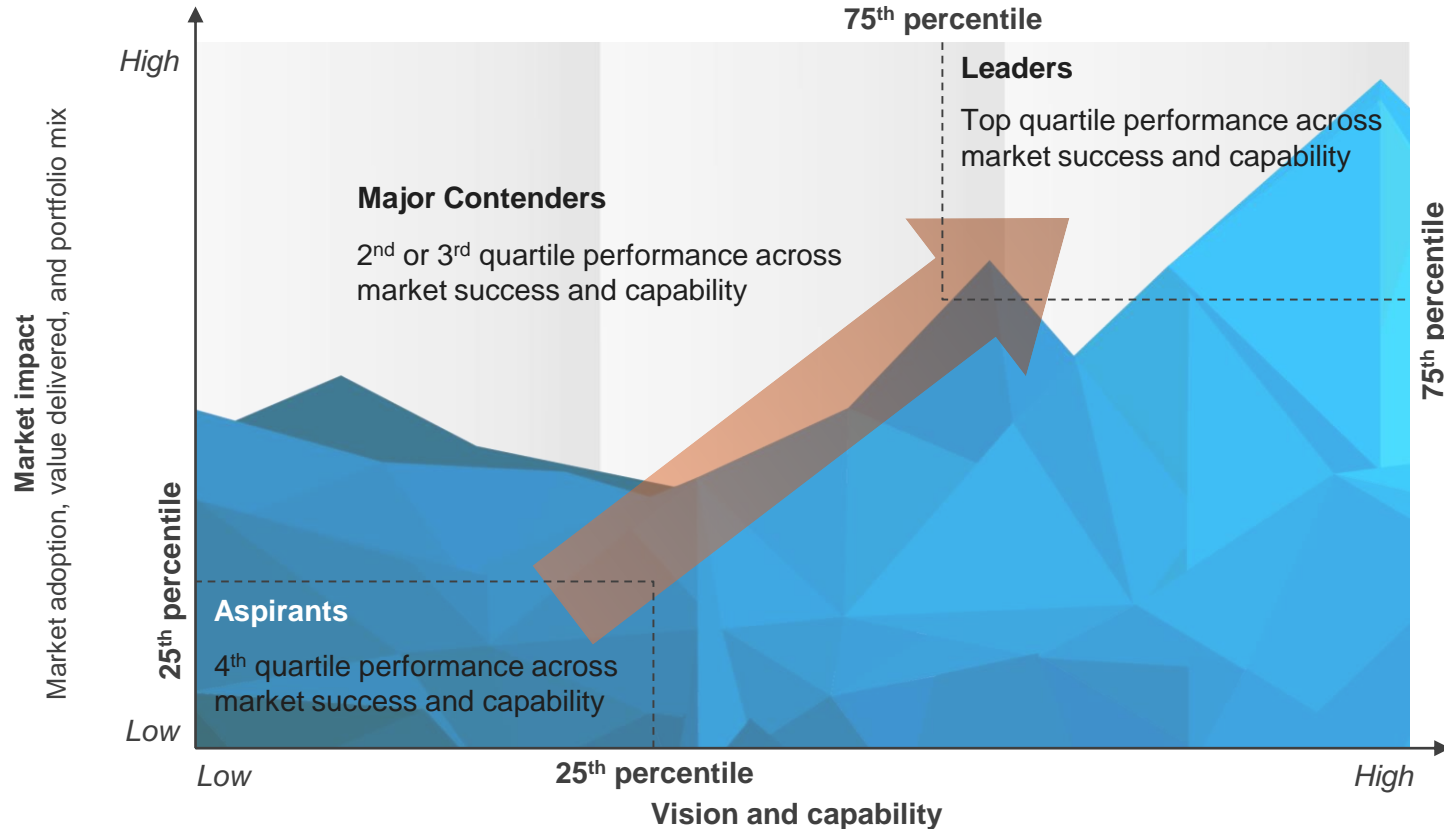
| Development | Details |
|--|---|
| Clinical One Platform | June 2017: Oracle introduced Clinical One Platform – a new cloud-based eClinical solution that unifies clinical development operations and information in a single environment with shared functions and interfaces for clinical sites and clinical coordinates |
| Oracle Health Sciences (OHS) Data Management Cloud Service | March 2017: Oracle introduced OHS Data Management Workbench Cloud Services, intended to reduce cost and increase traceability of clinical development data and processes |

Source: Everest Group (2017)

Appendix

Everest Group PEAK Matrix™ is a proprietary framework for assessment of a service provider's capability

Everest Group PEAK Matrix™ for life sciences clinical trials products

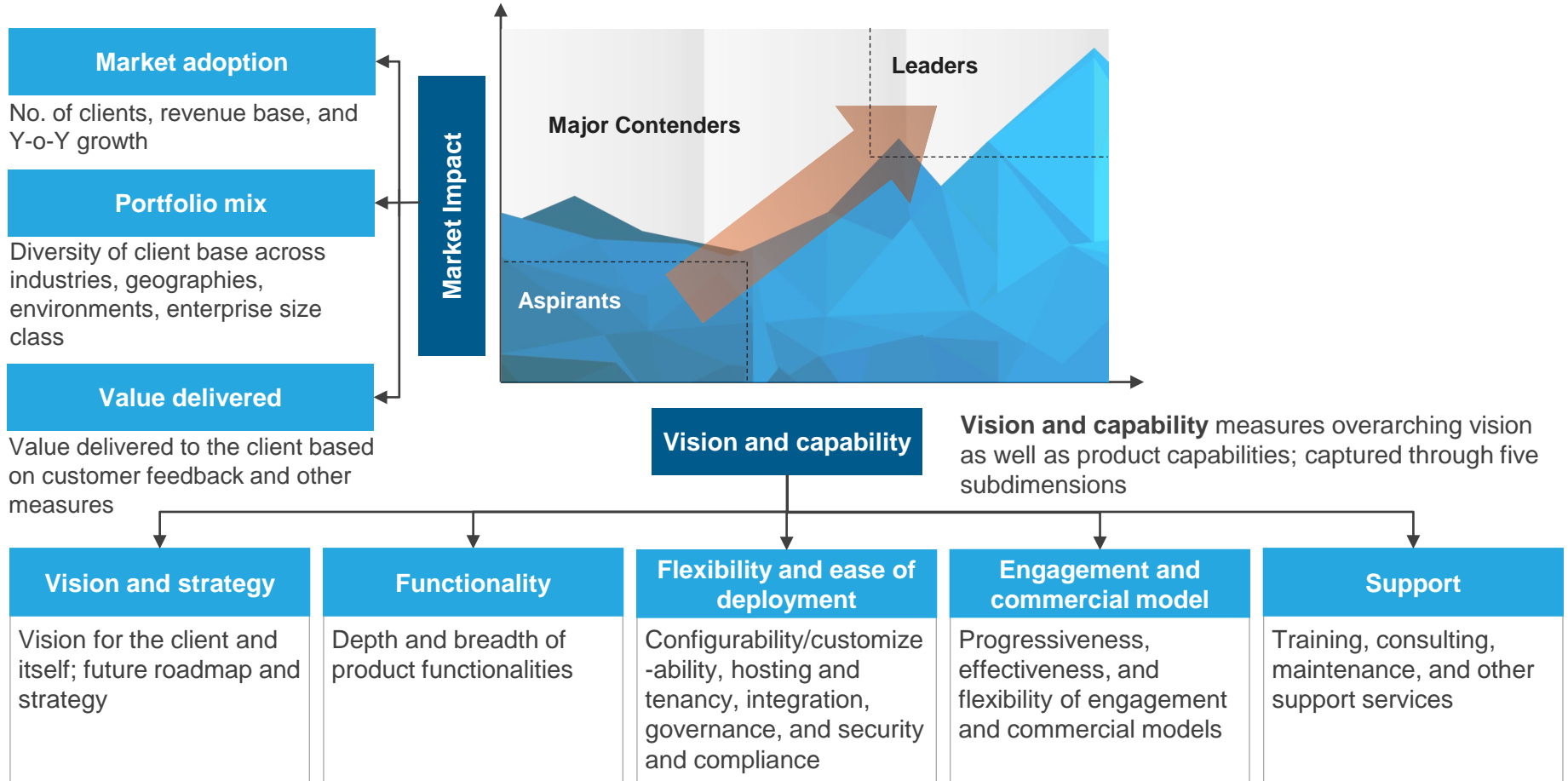


(Vision & strategy, functionality, flexibility and ease of deployment, engagement and commercial model, and support)

Everest Group PEAK Matrix™ for life sciences clinical trials products is a composite index of a range of distinct metrics related to a vendor's vision & strategy, functionality, flexibility and ease of deployment, support, and engagement & commercial model, and resultant market impact in terms of market adoption, value delivered, and portfolio mix in the context of clinical trials market

Dimensions of product vendor's capability and market success underlying the PEAK Matrix for products

Market Impact measures impact created in the market
– captured through three subdimensions



1 Subdimensions and associated weightage may vary by each market

Does the PEAK Matrix assessment incorporate any subjective criteria?

- Everest Group's PEAK Matrix assessment adopts an objective and fact-based approach (leveraging service provider RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information). In addition, these results are validated / fine-tuned based on Everest Group's market experience, buyer interaction, and provider briefings

Is being a “Major Contender” or “Aspirant” on the PEAK Matrix, an unfavorable outcome?

- No. PEAK Matrix highlights and positions only the best-in-class service providers in a particular functional/vertical services area. There are a number of providers in the global scenario that are assessed but do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition

What other aspects of PEAK Matrix assessment are relevant to buyers and providers besides the “PEAK Matrix position”?

- PEAK Matrix position is only one aspect of Everest Group's overall assessment. In addition to assigning a “Leader”, “Major Contender” or “Aspirant” title, Everest Group highlights the distinctive capabilities and unique attributes of all the PEAK Matrix providers assessed in its report. The detailed metric-level assessment and associated commentary is helpful for buyers in selecting providers for their specific requirements. It also helps providers showcase their strengths in specific areas

What are the incentives for buyers and providers to participate in / provide input to PEAK Matrix research?

- Participation incentives for buyers include a summary of key findings from the PEAK Matrix assessment
- Participation incentives for providers include adequate representation and recognition of their capabilities/success in the market place, and a copy of their own “profile” that is published by Everest Group as part of the “compendium of PEAK Matrix providers” profiles

What is the process for a service provider to leverage their PEAK Matrix positioning status?

- Providers can use their PEAK Matrix positioning rating in multiple ways including:
 - Issuing a press release declaring their positioning/rating
 - Getting customized PEAK Matrix profile for circulation (with clients, prospects, etc.)
 - Quotes from Everest Group analysts could be disseminated to the media
 - Leveraging PEAK Matrix branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)
- **The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with the designated POC at Everest Group**



About Everest Group

Everest Group is a consulting and research firm focused on strategic IT, business services, and sourcing. We are trusted advisors to senior executives of leading enterprises, providers, and investors. Our firm helps clients improve operational and financial performance through a hands-on process that supports them in making well-informed decisions that deliver high-impact results and achieve sustained value. Our insight and guidance empower clients to improve organizational efficiency, effectiveness, agility, and responsiveness. What sets Everest Group apart is the integration of deep sourcing knowledge, problem-solving skills and original research. Details and in-depth content are available at www.everestgrp.com.

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