



Everest Group PEAK Matrix™ for Clinical Trials Product Vendors 2019

Focus on Oracle Health Sciences
July 2019



Copyright © 2019 Everest Global, Inc.

This document has been licensed for exclusive use and distribution by Oracle Health Sciences

Introduction and scope

Everest Group recently released its report titled “[Life Sciences Clinical Trials Products PEAK Matrix™ Assessment 2019: Integrated Platforms Rise to the Challenge.](#)” This report analyzes the changing dynamics of the life sciences clinical trials products landscape and assesses vendors across several key dimensions.

As a part of this report, Everest Group updated its classification of 16 vendors on the Everest Group PEAK Matrix™ for Life Sciences Clinical Trials Products into Leaders, Major Contenders, and Aspirants. The PEAK Matrix is a framework that provides an objective, data-driven, and comparative assessment of clinical trials products vendors based on their absolute market impact and vision & capability. Everest Group also identified three vendors as the “2019 Clinical Trials Products Market Star Performers” based on the strongest forward movement demonstrated on the PEAK Matrix year-on-year.

Based on the analysis, **Oracle Health Sciences maintained its position as a Leader.** This document focuses on **Oracle Health Sciences’** life sciences clinical trials products experience and capabilities and includes:

- Oracle Health Sciences’ position on the Life Sciences Clinical Trials Products PEAK Matrix
- Oracle Health Sciences’ year-on-year movement on the Life Sciences Clinical Trials Products PEAK Matrix
- Detailed Life Sciences Clinical Trials Products profile of Oracle Health Sciences

Buyers can use the PEAK Matrix to identify and evaluate different vendor. It helps them understand the vendors’ 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 vendor capability for an ideal fit.

Background and methodology

Digital technologies have the potential to streamline and accelerate each stage of the clinical trials process – from matching eligible patients to studies, to data collection and monitoring adherence. However, the overall life sciences industry has been slow to digitize clinical trials, with even the most technologically advanced enterprises only piloting technologies in different areas of clinical development.

As the industry continues to struggle with its fundamental challenge of achieving faster time-to-market, organizations need to act immediately to devise a robust strategy to harness the full potential of digital in clinical development. In response, clinical trials product vendors have been making significant efforts around ramping up their proprietary solutions portfolio, with many now focusing on taking an end-to-end single vendor platform for clinical trials to the market. What remains to be seen is whether these investments and innovative offerings can now translate into positive business outcomes for enterprises.



In this report, we analyze the capabilities of 16 IT vendors specific to clinical trials 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 vision & capability and market impact. We focus on:

- Market trends for clinical trials and the associated products market
- The landscape of vendors for clinical trials products
- Assessment of the vendors on several vision & capability- and market impact-related dimensions

Scope of this report:



Geography
Global



Industry
Life sciences (pharmaceuticals, medical devices, biotechnology, and other life sciences¹)



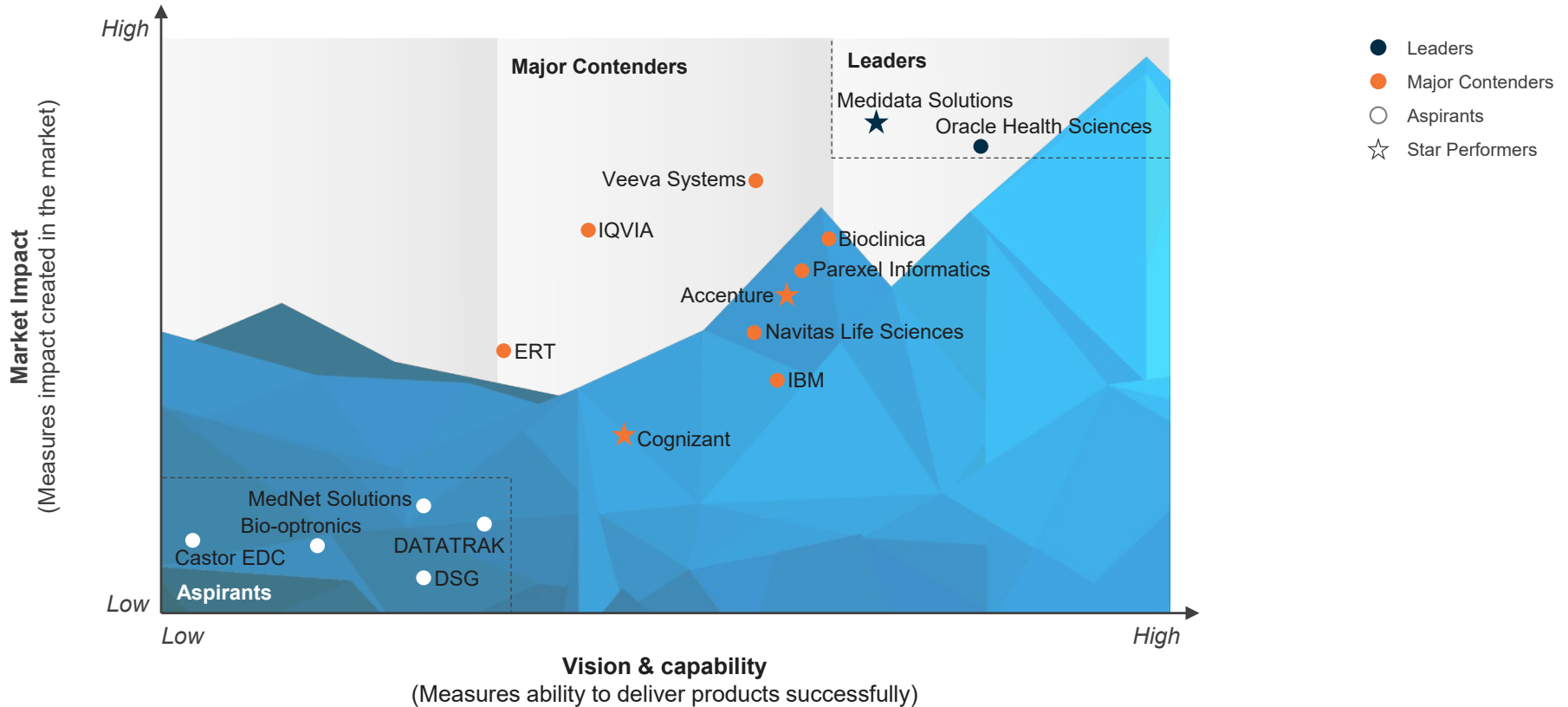
Vendor offering
Clinical trials software products

¹ Includes healthcare data & information services and medical products distribution

Everest Group PEAK Matrix™

Life Sciences Clinical Trials Products PEAK Matrix™ Assessment 2019 | Oracle Health Sciences positioned as Leader

Everest Group Life Sciences Clinical Trials Products PEAK Matrix™ Assessment 2019 ^{1,2}



1 PEAK Matrix specific to clinical trials software products for life sciences firms

2 Assessment for Bioclinica, ERT, IBM, IQVIA, Navitas Life Sciences, Parexel Informatics, Veeva Systems, Bio-optronics, Castor EDC, DATATRAK, DSG, and MedNet Solutions excludes vendor inputs and is based on Everest Group's proprietary Transaction Intelligence (TI) database, vendor public disclosures, and Everest Group's interactions with buyers

Clinical trials products PEAK Matrix characteristics

Leaders	Major Contenders	Aspirants
<p>Medidata Solutions and Oracle Health Sciences</p>	<p>Accenture, Bioclinica, Cognizant, ERT, IBM, IQVIA, Navitas Life Sciences, Parexel Informatics, and Veeva Systems</p>	<p>Bio-optronics, Castor EDC, DATATRAK, DSG, and MedNet Solutions</p>
<ul style="list-style-type: none"> • Leaders have established themselves as front runners to support life sciences firms looking to achieve digital transformation within clinical trials • These players have showcased: <ul style="list-style-type: none"> – An integrated end-to-end platform offering for processes across the complete clinical trial – A healthy mix of mid- and large-sized clientele, with accounts in many prominent life sciences firms – Technological expertise and the ability to incorporate digital technology themes within their products – Consulting pedigree to add to strong product functionality • Leaders continue to keep pace with market dynamics through continued investments in technology and capability development (internal IP / tools, M&A, partnerships, etc.) • However, they now face stiff competition from CROs and IT service providers, who are gaining traction in this market 	<ul style="list-style-type: none"> • While a few of these players have complete integrated end-to-end platform offerings, some have built meaningful capabilities to deliver a wide range of IT services across multiple clinical trial processes • Others are influential within specific areas, such as EDC, clinical operations, and clinical data management and analytics • Some of these players also have considerable focus on emerging markets, such as the Asia Pacific region, for clinical trials • Some of these vendors are making high-profile investments around the clinical trials business to bridge the gap with Leaders. For instance, Bioclinica’s acquisition of MDDX Research & Informatics and Navitas Life Sciences’ acquisition of DataCeutics Inc. 	<ul style="list-style-type: none"> • These vendors do not have balanced coverage across all clinical trials processes, with most of them offering a number of distinct point solutions • These players are limited by their scale and process coverage • Some of these players are trying to grow in the clinical trials IT market by addressing relevant demand themes. For example, Bio-optronics has partnered with Synexus with an aim to improve patient access to modern medicine and enhance overall clinical trial efficiency • Similarly, MedNet Solutions has partnered with Arivis to help provide clients with a single source of data and foster improved efficiency and quality in the clinical research process

Oracle Health Sciences | Life sciences clinical trials products profile

Overview (page 1 of 2)

Company mission/vision statement for clinical trials IT

To enable the pharmaceutical industry to adopt new technologies and methodologies for performing clinical trials through the new eClinical platform, Clinical One, while continuing to add innovation to existing eClinical products and platforms, allowing the industry to advance clinical trials and make significant progress in running faster, higher quality, and low-cost trials.

Strengths

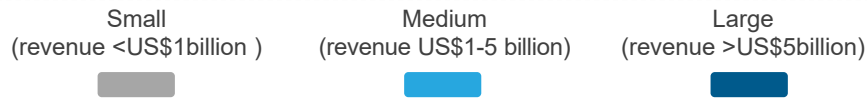
- Acquisitions and alliances across all phases of clinical trials to build a holistic set of offerings
- Integrated end-to-end vision and market messaging, having previously had a portfolio of numerous disparate solutions

Areas of improvement

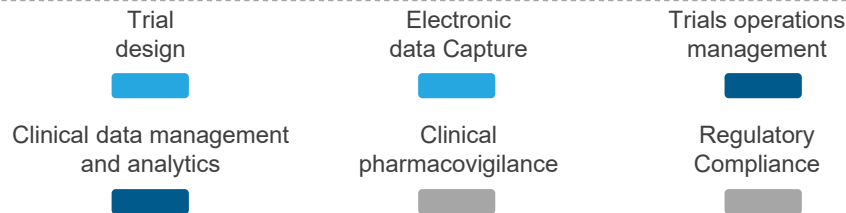
- Oracle Health Sciences needs to build differentiated offerings for smaller players and emerging markets
- Should now look at bringing in more next-gen technology themes into its offerings, such as AI for patient recruitment or advanced analytics for adaptive trials

Revenue contribution: ■ High (>30%) ■ Medium (10-30%) ■ Low (<10%)

Focus by customer segment



Focus by clinical trials coverage



Focus by subvertical



Clinical trials products revenue 2018



Overview of client base

Oracle Health Sciences 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.

Oracle Health Sciences | Life sciences clinical trials products profile

Offerings and recent developments (page 2 of 2)

Proprietary solutions for life sciences clinical trials products (representative list)

Solution	Details
Oracle Clinical One	A cloud-based integrated platform, with capabilities for randomization and supply management, data capture, data management, trial management, portfolio planning, budgeting and resource tracking, risk management, safety management, and safety signal detection
Oracle Siebel CTMS	It is a centralized clinical trial management system, which enables sponsors & CROs to collect and track data and perform site management activities and product monitoring trip reports
ClearTrial	SaaS solution for budgeting and scenario planning for clinical trial costs, leveraging embedded industry intelligence and industry proven algorithms for multiple therapeutic areas, labor rates for over 90 countries, and detailed clinical, cost, and resource reports
goBalto tools	<ul style="list-style-type: none"> • goBalto Select: Site Selection tool which uses a data-oriented approach to assess selection and performance data to identify investigator sites. It helps in site identification, site selection, site feasibility, and site sorting • goBalto Activate: Study Startup tool that helps study teams to complete and track specific documents and tasks required for any site, country or study. It ensures regulatory and customer SOP compliance in site activation, regulator collection and distribution, and site contracting • goBalto Analyze: Enables automated reporting module for sharing analytics with internal and external stakeholders
IRT	Manages patient randomization and global clinical trial supply management, designed for use on both web and telephone
InForm Suite	Integrated electronic data capture platform providing complete data capture capabilities including advanced query management, study design, coding, and IRT. Full self-service deployment capabilities and mid-study changes with no data migration. Support for risk-based monitoring and adaptive trials. Integrated with Siebel CTMS, CDA, and Argus

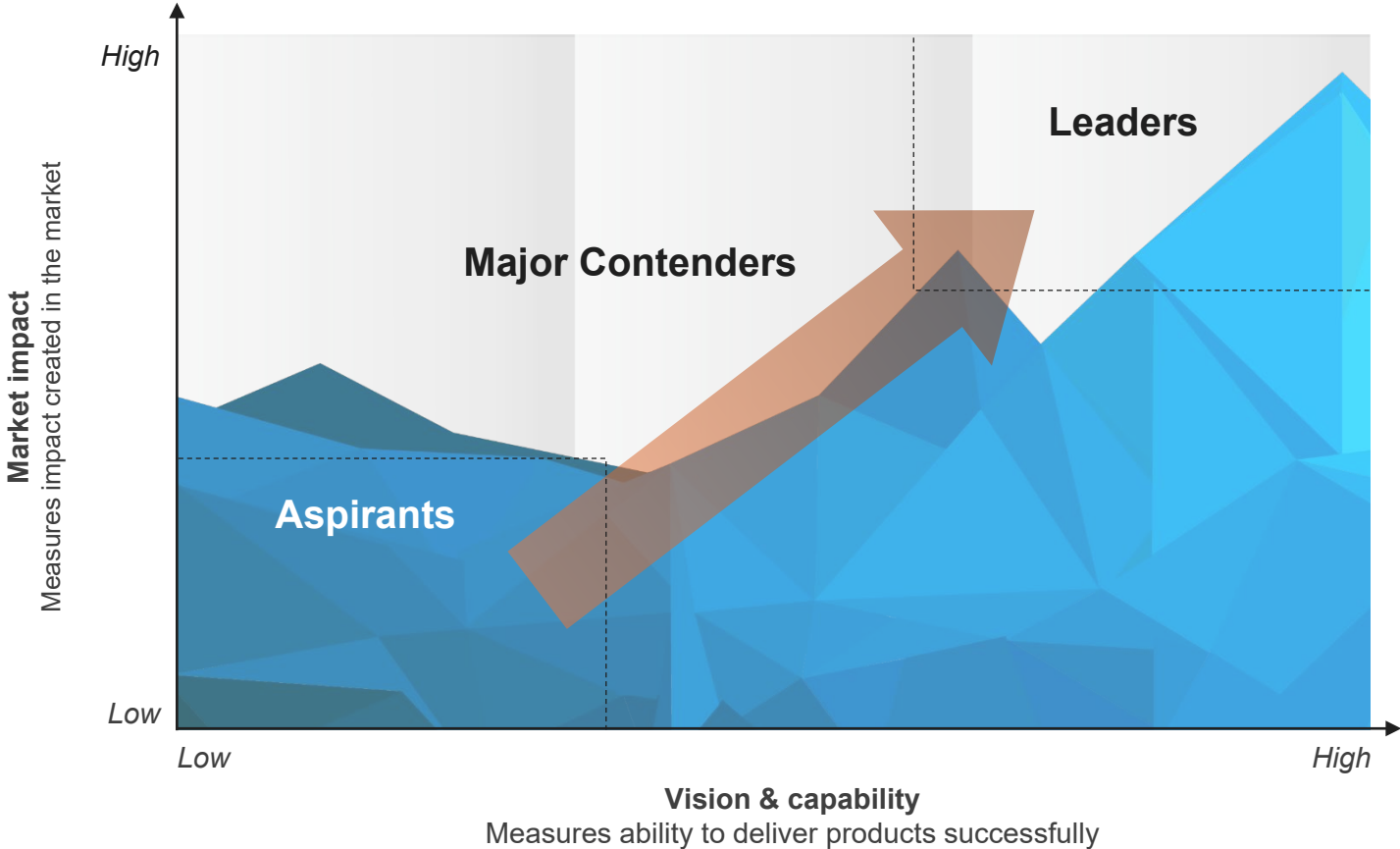
Key events (representative list)

Event name	Type of event	Details
Partnership with HCL	Alliance	April 2019: Oracle entered into an mHealth partnership with HCL technologies, introducing a key full service mHealth offering utilizing Oracle's mHealth Adapter
Oracle bought goBalto	Acquisition	October 2018: Oracle Health Sciences announced that it has entered into an agreement to acquire goBalto,
GSI alliances	Alliance	Oracle has Global System Integrator (GSI) partnerships with Accenture, Deloitte, Cognizant, HCL, and TCS
SI partnerships	Alliance	Oracle has Systems Integrator (SI) partnerships with Perficient, Navitas, Techsol, Pharmasol, Insife, and Arithmos
Consulting partnerships	Alliance	Oracle Health Sciences has a consulting partnership with Kinapse

Appendix

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

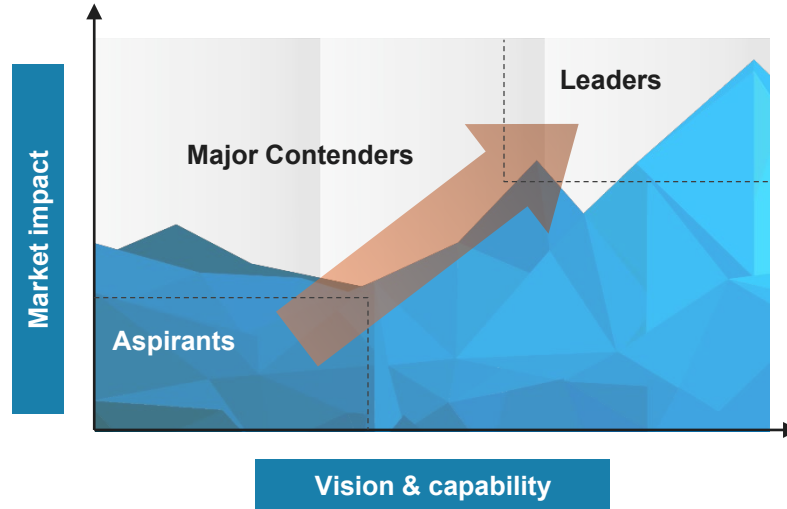
Everest Group PEAK Matrix



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/customizability, 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

Does the PEAK Matrix™ assessment incorporate any subjective criteria?

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

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

No. The PEAK Matrix highlights and positions only the best-in-class service providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and 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”?

A 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 particular providers/vendors for their specific requirements. It also helps providers/vendors showcase their strengths in specific areas

What are the incentives for buyers and providers to participate/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/vendors 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 / technology vendor to leverage their PEAK Matrix positioning and/or “Star Performer” status ?

- Providers/vendors can use their PEAK Matrix positioning or “Star Performer” rating in multiple ways including:
 - Issue a press release declaring their positioning. See [citation policies](#)
 - Customized PEAK Matrix profile for circulation (with clients, prospects, etc.)
 - Quotes from Everest Group analysts could be disseminated to the media
 - Leverage 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.

Does the PEAK Matrix evaluation criteria change over a period of time?

PEAK Matrix assessments are designed to serve present and future needs of the enterprises. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality as well as serve the future expectations of enterprises



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.

Dallas (Headquarters)

info@everestgrp.com
+1-214-451-3000

Bangalore

india@everestgrp.com
+91-80-61463500

Delhi

india@everestgrp.com
+91-124-496-1000

London

unitedkingdom@everestgrp.com
+44-207-129-1318

New York

info@everestgrp.com
+1-646-805-4000

Toronto

canada@everestgrp.com
+1-416-388-6765

Stay connected

Website



www.everestgrp.com

Social Media



@EverestGroup



@Everest Group

Blog



www.everestgrp.com/blog/