



Everest Group Life Sciences Electronic Data Capture (EDC) Products PEAK Matrix® Assessment 2024

Focus on Oracle

October 2024



Introduction

Electronic Data Capture (EDC) systems are an integral part of clinical research enabling the collection, storage, and management of clinical data. EDCs represent the major shift from paper-based Case Report Forms (CRFs) to digital and web-based trial data collection. The importance of EDC systems was further underscored during the COVID-19 pandemic, as the need for remote and decentralized clinical trials surged. The pandemic highlighted the necessity for robust, flexible, and secure data capture solutions that could support the rapid development and approval of treatments and vaccines.

In response to the evolving sponsor needs, EDC providers have constantly innovated and upgraded their offerings. It has transitioned from being a medium of data collection and stand-alone system to a comprehensive and well-integrated data management solution. Providers are investing in real-time data analytics, Artificial Intelligence (AI), and Machine Learning (ML) to improve data quality and trial efficiency. Providers are also emphasizing interoperability, ensuring their systems can seamlessly integrate with other clinical trial technologies such as Electronic Health Records (EHRs), Electronic Medical

Records (EMRs), and Laboratory Information Management Systems (LIMS). Integration with a larger number of Real-world Data (RWD) sources, investments in AI, analytics, and creating an intuitive user experience would help providers to stay competitive in this market.

In the report, we assess the capabilities of 20 EDC providers. The providers are mapped on the [Life Sciences Electronic Data Capture \(EDC\) Products PEAK Matrix® Assessment 2024](#) which is a composite index of a range of distinct metrics related to a provider's capability and market impact.

The full report includes the profiles of the following 20 leading EDC providers featured on the EDC products PEAK Matrix:

- **Leaders:** Medidata Solutions, Zelta (Merative), Oracle, Veeva Systems, and Viedoc Technologies
- **Major Contenders:** Castor, Cloudbyz, CRScube, Crucial Data Solutions, EDETEK, Emmes, Mednet, Medrio, OpenClinica, and REDCap Cloud
- **Aspirants:** Clinion, Cliniv, Jeeva Clinical Trials, JNPMEDI, and SyMetric

Scope of this report

Geography: Global

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

Products: Electronic Data Capture (EDC)

Life sciences EDC products PEAK Matrix® characteristics

Leaders

Medidata Solutions, Oracle, Veeva Systems, and Viedoc Technologies, Zelta (Merative)

- Leaders demonstrate comprehensive EDC capabilities—data ingestion, study design, mid-study changes, data management, review, and reporting. Their integration with devices, wearables, EMR/EHR providers, and RWD sources set them apart from competitors
- Clients appreciate them for their ease of use and low-code functionalities, enabling smooth operations with minimal/no technical and programming skills
- The majority of the Leaders stand out for their native SDTM transformation capabilities; offering a data ingestion pipeline, taking data from sources and directly converting them into SDTM standard formats
- Leaders are investing in AI and ML to enhance EDC capabilities within areas such as protocol generation, data extraction, remote SDV automation, and AI-based query management and anomaly detection

Major Contenders

Castor, Cloudbyz, CRScube, Crucial Data Solutions, EDETEK, Emmes, Mednet, Medrio, OpenClinica, and REDCap Cloud

- While they are investing toward improving the User Interface/User Experience (UI/UX), they need to equally focus on enhancing integration capabilities with RWD sources and incorporating more of AI and automation capabilities within the EDC product
- Major Contenders enjoy a good brand recall within the small and medium biopharmaceutical segment, while also being cost-effective EDC providers
- Most lack partnerships with System Integrators (SIs), opting for a self-service EDC deployment model, which can be challenging, particularly when scaling and expanding
- They need to augment their marketing efforts, showcasing features and success stories to increase brand recall and enterprise mindshare
- Major Contenders lag Leaders in certain EDC capabilities; especially within areas such as SDTM transformations, remote SDV, bulk query management, and reporting

Aspirants

Clinion, Cliniv, Jeeva Clinical Trials, JNPMEDI, and SyMetric

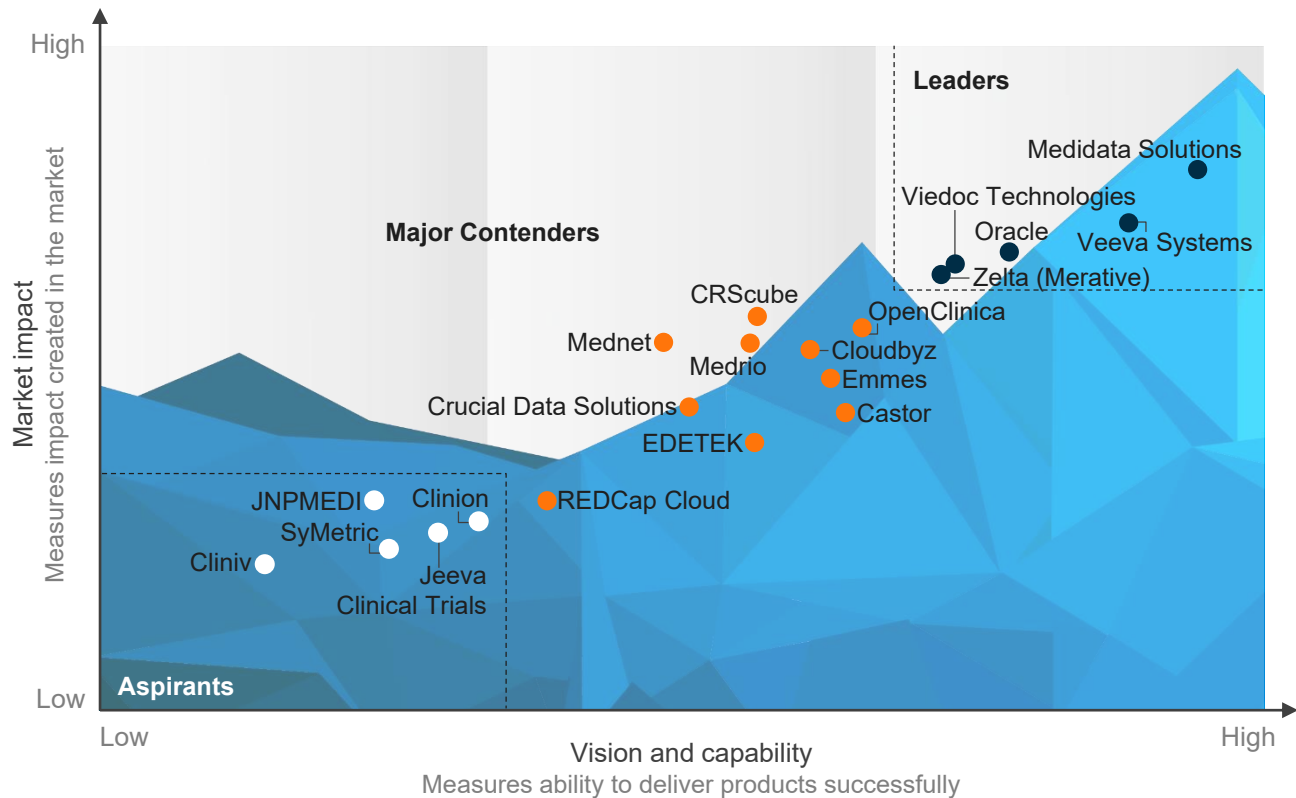
- Aspirants do not have a well-defined vision, focused on developing a comprehensive data management solution (covering data integrations, investments in AI/ML, and improving the UI/UX)
- They lack a robust partnership network – minimal collaboration with CROs, SIs, hospital and site networks, and industry consortia
- Clients mention about limited in-built reports and express desire to improve on capabilities such as implementing mid-study changes, data integrations, SDTM and remote SDV capabilities, and analytics and reporting capabilities
- They have very little investments around AI and automation capabilities within the EDC offering

Everest Group PEAK Matrix®

Life Sciences Electronic Data Capture (EDC) Products PEAK Matrix® Assessment 2024 | Oracle is positioned as a Leader

Everest Group Life Sciences Electronic Data Capture (EDC) Products PEAK Matrix® Assessment 2024^{1,2}

- Leaders
- Major Contenders
- Aspirants



¹ Assessments for Castor, Oracle, REDCap Cloud, and Veeva Systems excludes provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with insurance buyers
² Analysis for Medrio is based on partial primary inputs (no briefing and demo given)
 Source: Everest Group (2024)

Oracle profile (page 1 of 6)

Overview

Company mission/vision statement for life sciences EDC products

Oracle's vision is to transform clinical trials with its EDC solutions. Its approach streamlines workflows and unifies data collection from many sources, enabling life sciences businesses to accelerate study timelines, improve data accuracy, and create quicker, patient-centric innovations. It delivers secure and intuitive platforms that bridge the gap between clinical research and care.

Overview of the client base

Its clients include The National Institute of Allergy and Infectious Diseases (NIAID), ObvioHealth, WallabyPhenox, and more.

Life sciences EDC product revenue mix

● N/A (0%) ● Low (1-20%) ● Medium (20-40%) ● High (>40%)

By geography

- North America
- Asia Pacific
- United Kingdom
- Latin America
- Europe
- Middle East & Africa

By business lines

- Pharmaceutical
- Crop sciences
- Medical devices
- Animal health
- Consumer health
- Others

By buyer size

- Small (annual client revenue <US\$1 billion)
- Medium (annual client revenue US\$1-5 billion)
- Large (annual client revenue >US\$5 billion)

Oracle profile (page 2 of 6)

Case studies

CASE STUDY 1

Optimized hybrid clinical trials with Oracle Clinical One and enhanced data management and trial efficiency

Business challenge

The client faced a significant challenge with data management in hybrid clinical trials, which combine site visits and remote activities. The data from various sources such as electronic patient-reported outcomes, device data, site assessments, and EHRs was fragmented across different systems. This lack of integration created complexities in data consolidation and analysis, impeding effective trial management.

Solution and impact

The client chose Oracle Clinical One for its technology and centralized data management capabilities. By integrating data from multiple sources into a unified platform, Clinical One streamlined data capture and analysis. This approach provided real-time insights into patient conditions and reduced burdens on patients and clinical sites. As a result, the client enhanced trial efficiency and benefited from Oracle's CRO growth initiative, ensuring continued support and innovation for future studies.

CASE STUDY 2

Streamlined volunteer registration and screening for COVID-19 trials and enabled rapid global participation

Business challenge

The client faced a pressing need to efficiently register and screen volunteers for large-scale COVID-19 vaccine and monoclonal antibody trials. The challenge was to manage a vast number of participants quickly and accurately across numerous clinical trial sites, ensuring inclusivity and timely data collection.

Solution and impact

Oracle developed the CoVPN volunteer screening registry, a cloud-based system to streamline volunteer registration and screening. Within a week, over 100,000 people registered. This system supports hundreds of trial sites globally and is part of Oracle's broader effort, including the therapeutic learning system, to enhance data collection and accelerate the vaccine development process.

Oracle profile (page 3 of 6)

Summary of capabilities and features

Product features

Form (eCRFs) and survey builder	Integrations with other systems	Adaptive study design support
Real-time data validation and quality control	Study and site performance monitoring	Data management capabilities (such as storage, extraction, standardization)
Compliance with regulatory standards (such as HIPAA, GDPR, ISO)	Comprehensive reporting, analytics, and data visualization	Role-based access management and task interface

Product capabilities

Capability/feature available **Capability/feature not available**

Easy to use and intuitive designer interface (such as single sign-on, drag and drop form designer)	Library of reusable templates (supporting industry standards such as CDISC CDASH)	Data entry and collection in multiple languages (language and localization support)
APIs to connect lab data, eCOA/eDiaries, connected devices and wearables, CTMS, third party systems	Direct EHR/EMR connectivity	Data review and standardization (such as targeted SDV, CDISC ODM, SDTM mapping support)
Mobile compatibility (using native browser and app on smartphones or tablets)	In-built report templates and flexibility to create ad-hoc reports	Protocol amendments with zero downtime and no migrations
Privacy data masking to handle accidental privacy data entry	Alert and notification functionalities (such as email/SMS/webhooks)	Medical coding functionalities (manual, automatic / WHO-Drug, MedDRA)

Oracle profile (page 4 of 6)

Product capabilities and features

[NOT EXHAUSTIVE]

Product capabilities and features (representative list)

Product capabilities/features	Details
InForm	It provides a wide platform of integrated systems and workflows in the industry to boost productivity and improve data quality while cutting costs.
Clinical One	It is a standards-compliant, interoperable platform for data collection, randomization, and trial supply management. It allows for the creation and changing of studies without requiring deployments, tickets, or downtime; collects data from anywhere; accesses trial insights at any time; and manages all of the integrations in one location.

Oracle profile (page 5 of 6)

Recent developments

[NOT EXHAUSTIVE]











Key events (representative list)

Event name	Type of event	Details
Cerner	Acquisition	Acquired Cerner, a provider of digital information systems used in hospitals and health systems to help physicians treat patients and communities more effectively
Clinical One	Platform	Released the Clinical One cloud service for data collection
Clinixir	Partnership	Selected by Clinixir for its pharmacovigilance and clinical research solutions, including its eClinical platform; the Oracle Health Sciences Clinical One Cloud Service was selected by Clinixir due to its extensive range of applications and all-encompassing technological capabilities

Oracle profile (page 6 of 6)

Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact				Vision and 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

- Oracle has a robust integration network with patient data sources such as EHR database, claims and RCM data, access to healthcare providers, and site network
- It has a strong brand recall and familiarity with sites and sponsors due to its legacy in the EDC landscape
- Oracle is appreciated for its ease of eCRF creations, data validation checks, data loading, extraction, and other data management capabilities
- Clients rate Oracle’s products highly on their security, governance, and compliance abilities
- It is rated highly for the flexibility showcased in customizations and willingness to model offerings as per clients’ needs

Limitations

- Oracle needs to work on ease of customizations and expanding options for low-code/no-code functionalities
- Clients have expressed dissatisfaction because Oracle has stopped support services for inForm, which now incurs a separate cost and is cumbersome to manage
- It should refine the UI to make it more intuitive and user-friendly. The design and layout of the icons and buttons could be a starting point
- It can invest in next-generation technologies such as AI and ML for enhancing capabilities such as data extraction from protocols and removing SDV automation, medical coding, SDTM annotations, and query management

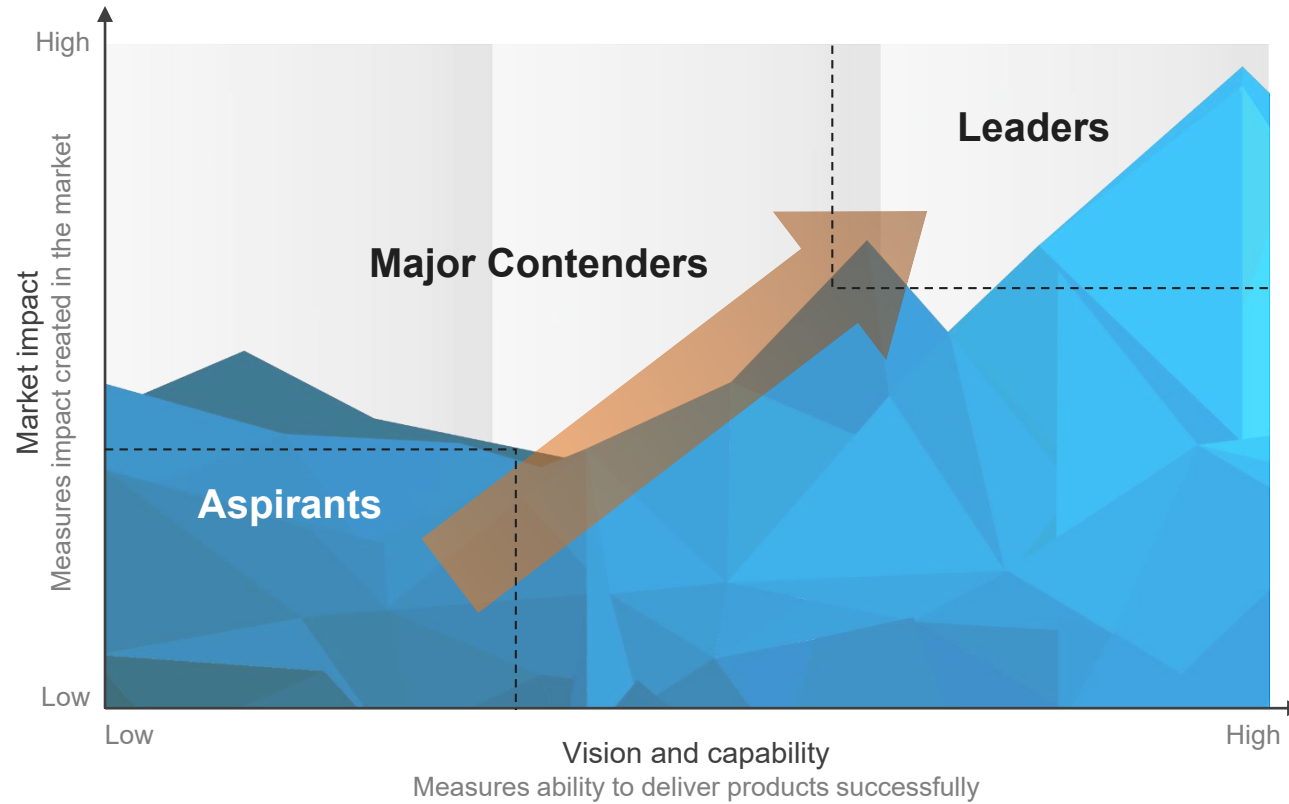
Appendix

PEAK Matrix® framework

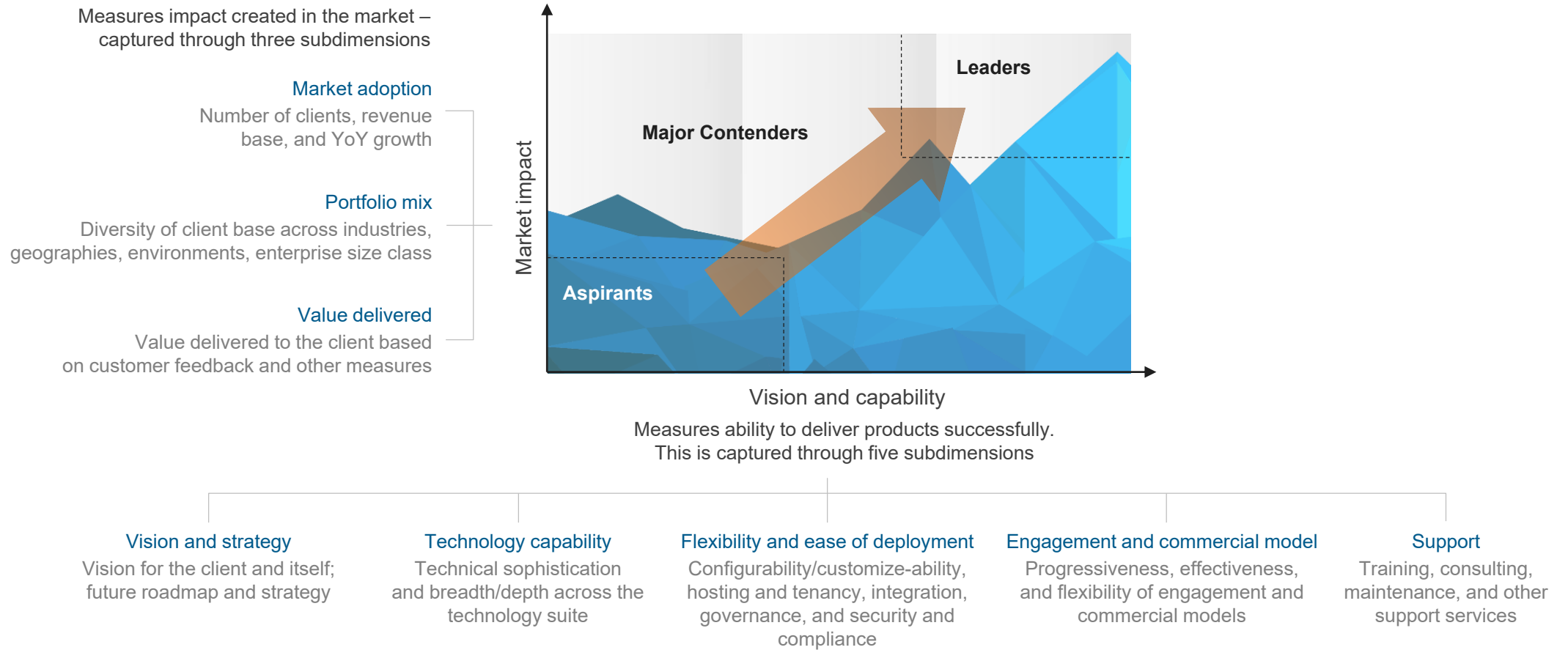
FAQs

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

Everest Group PEAK Matrix



Products PEAK Matrix® evaluation dimensions



FAQs

Q: Does the PEAK Matrix® assessment incorporate any subjective criteria?

A: Everest Group's PEAK Matrix assessment takes an unbiased and fact-based approach that leverages provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information. In addition, we validate/fine-tune these results based on our market experience, buyer interaction, and provider/vendor briefings.

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

A: No. The PEAK Matrix highlights and positions only the best-in-class 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.

Q: What other aspects of the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?

A: A PEAK Matrix positioning is only one aspect of Everest Group's overall assessment. In addition to assigning a Leader, Major Contender, or Aspirant label, Everest Group highlights the distinctive capabilities and unique attributes of all the providers assessed on the PEAK Matrix. The detailed metric-level assessment and associated commentary are helpful for buyers in selecting providers/vendors for their specific requirements. They also help providers/vendors demonstrate their strengths in specific areas.

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

A: Enterprise participants receive summary of key findings from the PEAK Matrix assessment

For providers

- The RFI process is a vital way to help us keep current on capabilities; it forms the basis for our database – without participation, it is difficult to effectively match capabilities to buyer inquiries
- In addition, it helps the provider/vendor organization gain brand visibility through being included in our research reports

Q: What is the process for a provider / technology vendor to leverage its PEAK Matrix positioning?

A: Providers/vendors can use their PEAK Matrix positioning or Star Performer rating in multiple ways including:

- Issue a press release declaring positioning; see our citation policies
- Purchase a customized PEAK Matrix profile for circulation with clients, prospects, etc. The package includes the profile as well as quotes from Everest Group analysts, which can be used in PR
- Use PEAK Matrix badges for 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 Everest Group; please contact your CD or contact us

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

A: PEAK Matrix assessments are designed to serve enterprises' current and future needs. 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 and to serve enterprises' future expectations.

Stay connected

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

Toronto

canada@everestgrp.com

+1-214-451-3000

Website

everestgrp.com

Blog

everestgrp.com/blog

Follow us on



Everest Group is a leading research firm helping business leaders make confident decisions. We guide clients through today's market challenges and strengthen their strategies by applying contextualized problem-solving to their unique situations. This drives maximized operational and financial performance and transformative experiences. Our deep expertise and tenacious research focused on technology, business processes, and engineering through the lenses of talent, sustainability, and sourcing delivers precise and action-oriented guidance. Find further details and in-depth content at www.everestgrp.com.

Notice and disclaimers

Important information. Please review this notice carefully and in its entirety. Through your access, you agree to Everest Group's terms of use.

Everest Group's Terms of Use, available at www.everestgrp.com/terms-of-use/, is hereby incorporated by reference as if fully reproduced herein. Parts of these terms are pasted below for convenience; please refer to the link above for the full version of the Terms of Use.

Everest Group is not registered as an investment adviser or research analyst with the U.S. Securities and Exchange Commission, the Financial Industry Regulatory Authority (FINRA), or any state or foreign securities regulatory authority. For the avoidance of doubt, Everest Group is not providing any advice concerning securities as defined by the law or any regulatory entity or an analysis of equity securities as defined by the law or any regulatory entity.

All Everest Group Products and/or Services are for informational purposes only and are provided "as is" without any warranty of any kind. You understand and expressly agree that you assume the entire risk as to your use and any reliance upon any Product or Service. Everest Group is not a legal, tax, financial, or investment advisor, and nothing provided by Everest Group is legal, tax, financial, or investment advice. Nothing Everest Group provides is an offer to sell or a solicitation of an offer to purchase any securities or instruments from any entity. Nothing from Everest Group may be used or relied upon in evaluating the merits of any investment. Do not base any investment decisions, in whole or part, on anything provided by Everest Group.

Products and/or Services represent research opinions or viewpoints, not representations or statements of fact. Accessing, using, or receiving a grant of access to an Everest Group Product and/or Service does not constitute any recommendation by Everest Group that recipient (1) take any action or refrain from taking any action or (2) enter into a particular transaction. Nothing from Everest Group will be relied upon or interpreted as a promise or representation as to past, present, or future performance of a business or a market. The information contained in any Everest Group Product and/or Service is as of the date prepared, and Everest Group has no duty or obligation to update or revise the information or documentation. Everest Group may have obtained information that appears in its Products and/or Services from the parties mentioned therein, public sources, or third-party sources, including information related to financials, estimates, and/or forecasts. Everest Group has not audited such information and assumes no responsibility for independently verifying such information as Everest Group has relied on such information being complete and accurate in all respects. Note, companies mentioned in Products and/or Services may be customers of Everest Group or have interacted with Everest Group in some other way, including, without limitation, participating in Everest Group research activities.