

Global EClinical Solutions Market Size Study & Forecast, by Product (EDC and CDMS, CTMS), Clinical Analytics Platforms, RTSM, Clinical Data Integration Platforms, eCOA, Safety Solutions, eTMF), by Delivery Mode (Web and Cloud based, On- Premise), by Development Phases, by End-use (Hospitals/Healthcare providers, CROs, Academic Institutes, Pharma & Biotech Organizations, Medical Device Manufacturers), and Regional Analysis, 2023-2030

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Abstracts

Global EClinical Solutions Market is valued at approximately USD 8.06 billion in 2022 and is anticipated to grow with a healthy growth rate of more than 14.1% over the forecast period 2023-2030. EClinical Solutions encompass a range of technology-driven tools, including electronic data capture and clinical data management systems, clinical trial management systems, and randomization and trial supply management. These solutions play a crucial role in the streamlined and enhanced management of clinical trial data. They provide a comprehensive set of tools for planning, overseeing, and monitoring clinical study portfolios by effectively organizing and integrating data generated during clinical trials. These solutions contribute to achieving favorable clinical research outcomes and ensuring compliance in submissions through the integration of contact management, calendars, monitoring, and document management. They facilitate efficient data entry, storage, and regulation, while also ensuring the authentication of data integrity and reliability. The implementation of eClinical Solutions contributes to expediting drug development timelines and enhancing the overall patient

experience in the clinical research process. The rising externalization of clinical trial studies by large pharmaceutical and biopharmaceutical companies, the growing advantages of eClinical solutions, coupled with the presence of a strong range of products in the pipeline are the key driving factors for market growth across the globe.

In addition, the growing incorporation of software solutions in clinical trials is the most prominent factor that is propelling the market demand over the estimated period. The globalization of clinical trials, involving multiple sites and geographies, requires centralized and standardized data management systems. According to Statista, in 2019, there were approximately 325,776 clinical studies were registered worldwide, which is continuously rising and reaching 409,300 as of March 2022. eClinical Solutions enables seamless collaboration and data sharing across different locations, which is fueling the market demand globally. Moreover, the growing outsourcing of clinical trial processes to CROs, as well as the gradual shift from manual data interpretation to real-time data analysis presents various lucrative opportunities over the forecast years. However, the scarcity of skilled research professionals and lack of recognition are hindering the market growth throughout the forecast period of 2023-2030.

The key regions considered for the Global EClinical Solutions Market study include Asia Pacific, North America, Europe, Latin America, and Middle East & Africa. North America dominated the market in 2022 owing to the growing target population and an increase in the prevalence of lifestyle-related conditions such as diabetes and cardiac disorders. The market is further propelled by the introduction of new products from eClinical solution providers and rising government grants within the region. Additionally, the presence of major industry players and access to advanced infrastructure are anticipated to contribute significantly to the regional market's expansion. Whereas, Asia Pacific is expected to grow at the highest CAGR over the forecast years. Substantial unmet medical needs and a rising incidence of chronic diseases such as cancer, cardiovascular conditions, and infectious diseases are significantly propelling the market demand across the region. A growing trend involves outsourcing a considerable number of clinical trials to countries such as China, India, Korea, and Japan, given their substantial patient populations and cost advantages. This outsourcing practice has significantly fueled the adoption of eClinical solutions in these regions. The APAC market's growth is further propelled by its status as an emerging economy, with government funding directed toward research and drug discovery, expected to bolster its expansion in the foreseeable future.

Major market players included in this report are:

Datatrak International, Inc.

Oracle Corporation

Parexel International Corporation

Dassault Systemes

Bioclinica

CRF Health

ERT Clinical

eClinicalWorks

IBM Watson Health

Anju Life Sciences Software

Recent Developments in the Market:

In June 2023, Syneos Health entered a collaboration with uMotif Limited, leveraging an advanced digital platform that integrates powerful Electronic Clinical Outcome Assessment (eCOA) and Electronic Patient-reported Outcomes (ePRO) capabilities. The objective of this partnership is to expedite clinical trials, enhancing the efficiency of delivering innovative medications to patients.

In May 2023, eClinical Solutions LLC. unveils the development of its Artificial Intelligence (AI) and Machine Learning (ML) capabilities within the Elluminate IQ offering. This advancement enables data management teams to conduct data reviews with increased efficiency and scalability, offering ML and AI features.

Global EClinical Solutions Market Report Scope:

Historical Data – 2020 - 2021

Base Year for Estimation – 2022

Forecast period - 2023-2030

Report Coverage - Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Segments Covered - Product, Delivery Mode, Development Phases, End-use, Region

Regional Scope - North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope - Free report customization (equivalent up to 8 analyst's working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values to the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within countries involved in the study.

The report also caters detailed information about the crucial aspects such as driving factors & challenges which will define the future growth of the market. Additionally, it also incorporates potential opportunities in micro markets for stakeholders to invest along with the detailed analysis of competitive landscape and product offerings of key players. The detailed segments and sub-segment of the market are explained below:

By Product:

Electronic Data Capture (EDC) and Clinical Data Management Systems (CDMS)

Clinical Trial Management Systems (CTMS)

Clinical Analytics Platforms

Randomization and Trial Supply Management (RTSM)

Clinical Data Integration Platforms

Electronic Clinical Outcome Assessment (eCOA)

Safety Solutions

Electronic Trial Master File (eTMF)

By Delivery Mode:

Web and Cloud based

On- Premise

By Development Phases:

Phase I

Phase II

Phase III

Phase IV

By End-use:

Hospitals/Healthcare providers

CROs

Academic Institutes

Pharma & Biotech Organizations

Medical Device Manufacturers

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

ROE

Asia Pacific

China

India

Japan

Australia

South Korea

RoAPAC

Latin America

Brazil

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