FROST & SULLIVAN

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2018 North American Real-World Evidence Enterprise Solutions Market Leadership Award

FROST & SULLIVAN

2018 BEST PRACTICES AWARD

NORTH AMERICAN
REAL-WORLD EVIDENCE ENTERPRISE SOLUTIONS
MARKET LEADERSHIP AWARD

2018
BEST PRACTICES
AWARDS

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Background and Company Performance

Industry Challenges

Within the past 5 to 7 years, real-world evidence (RWE) solutions have gained significant popularity and acceptance from healthcare industry stakeholders including payers, pharmaceutical companies, and regulatory agencies, as the digitalization of healthcare services makes care and patient data more available. Over the past couple of years, the industry has witnessed a number of mergers and acquisitions, as pharmaceutical or large healthcare IT companies looked to acquire or strengthen their real- word data (RWD) and RWE capability.

Data access and analytics for the generation of actionable insights are key aspects of RWE solutions. While Frost & Sullivan notes that data generation and access is no longer a challenge, data management, analytics, and insight generation are all bottleneck issues that the industry is trying to overcome. Traditionally, big pharmaceutical companies have focused on developing in-house capabilities for data management and analytics - although the task remains quite challenging for small and midsized companies (due to their limited budgets). Given the increasing complexity of new data sources and data sets, along with the shortage of data scientists receiving exposure to the life sciences industry, Frost & Sullivan observes how data management and analytics becomes even more daunting.

Pharmaceutical companies report to Frost & Sullivan that they are increasingly looking to partner with enterprise RWE solution providers that can support them in high-volume and complex data management, access, and analytics functions. External enterprise RWE solutions are even more critical for small and midsized pharmaceutical companies, due to their limited capability to manage this function and the strong pressure from regulators and payers to decrease product costs. In fact, in some countries RWE is now considered an important parameter for product approval and reimbursement decisions. As such, the demand for a reliable RWE solution vendor that offers end-to-end solutions has grown. Frost & Sullivan's recent research finds that total spend on RWE solutions from pharmaceutical companies will cross $2 billion by 2020.

Market Leadership

Accenture, a global IT and digital solutions leader, has been at the forefront of developing data integration, population health analytics, predictive health analytics, and patient insight platforms. The company's comprehensive RWE solutions enable pharmaceutical companies to create business models based on RWD outcomes. In addition to its analytics platform, the company provides a huge repository of more than 50 million patient records, which allows it to offer more comprehensive outcomes to clients.

Product Differentiation Focused on Clients' Applications

Frost & Sullivan recognizes how Accenture clearly differentiates itself by offering specific functions - such as gathering patient data and generating insights, identifying biomarkers for drug discovery, and providing predictive intelligence for drug discovery and trials. As outsourcing and partnerships are done at business and therapeutic category levels in this

market, it is simple for pharmaceutical companies to pick and choose applications that are specific to their needs.

While strong data management and analytics capabilities already differentiate Accenture from data service providers that offer RWE solutions, a strong, in-house electronic health record (EHR) database distinguishes it from core analytics vendors. The company's ability to manage and integrate a number of open source analytics tools fulfills a critical client demand: to supplement existing systems, rather than completely replacing them with new tools and platforms.

Leveraging Technology Expertise to Develop and Improve Solutions

Accenture is a well-known brand in life science IT and analytics solutions, and is widely recognized for its cutting-edge technology and functional expertise. The company has worked with nearly all of the top 10 global pharmaceutical companies and several leading biotechnology companies to support their RWE needs, and stays focused on providing innovative and reliable business-focused solutions. The company continually gathers insights about clients' existing and future business requirements to update its solutions and remain ahead of other competitors in the enterprise RWE solutions market.

The company recently focused on providing digital solutions for gathering and analyzing patient and clinical data. Accenture now plans to expand its reach in the genomics and multi-omics data segments to support precision medicine solutions.

Accenture is looking to apply its advanced IT expertise to develop digital research and development solutions, and support RWD data collection from remote patients by using sensors, wearables, and digital engagement methods.

The company is exploring artificial intelligence, machine learning, and cognitive tools for future RWE solutions, especially for analyzing digital pathology, medical imaging, and genomics databases. It has also forged partnerships with technology vendors including Oracle, Explorys, Predixion, and Liaison Technologies to integrate their tools in its solutions. Frost & Sullivan believes that such a futuristic perspective for product development is critical to staying competitive in this technology-focused market.

Strategic Positioning as an RWE Solutions Enabler and Superior Implemention Experience

Accenture has strategically positioned itself as the leading RWE solutions enabler. The company collaborates with different stakeholders and supplements their solutions with its own platform, technology, and industry expertise. For example, its recent deal with Roche is focused on digital data integration services for Roche's NAVIFY Tumor Board solution. In collaboration with Boston Scientific, the company is also providing actionable insights to hospitals to help them understand the patient population healthcare pattern and improve efficiency.

Frost & Sullivan feels that this positioning allows Accenture to truly bridge a gap between data analytics companies, database solution vendors, and clients. Since most big pharmaceutical companies are using a hybrid model to support RWE solutions, the role of the enabler becomes critical; in this market, Accenture stands apart from the rest of the competition.

Conclusion

Customer-focused solutions and innovative mind-sets are critical to success in the emerging data-driven and outcome-focused healthcare business model.

Accenture's abilities as a reliable and ever-evolving partner, along with its strong industry and functional background, position it as the clear leader in the RWE solutions market. Its commitment to address unmet needs and critical industry challenges makes it a valuable partner for pharmaceutical companies, which are experiencing a shift in their business model.

For its strong overall performance, Frost & Sullivan is proud to bestow the 2018 Market Leadership Award upon Accenture.

Significance of Market Leadership

Ultimately, growth in any organization depends upon customers purchasing from a company, and then making the decision to return time and again. Loyal customers become brand advocates; brand advocates recruit new customers; the company grows; and then it attains market leadership. To achieve and maintain market leadership, an organization must strive to be best-in-class in three key areas: understanding demand, nurturing the brand, and differentiating from the competition.

Understanding Market Leadership

Driving demand, strengthening the brand, and differentiating from the competition all play a critical role in a company's path to market leadership. This three-fold focus, however, is only the beginning of the journey and must be complemented by an equally rigorous focus on the customer experience. Best-practice organizations, therefore, commit to the customer at each stage of the buying cycle and continue to nurture the relationship once the customer has made a purchase. In this way, they build a loyal, ever-growing customer base and methodically add to their market share over time.

Key Performance Criteria

For the Market Leadership Award, Frost & Sullivan Analysts focused on specific criteria to determine the areas of performance excellence.

Criterion	Requirement
Growth Strategy Excellence	Demonstrated ability to consistently identify, prioritize, and pursue emerging growth opportunities
Implementation Excellence	Processes support the efficient and consistent implementation of tactics designed to support the strategy
Brand Strength	The possession of a brand that is respected, recognized, and remembered
Product Quality	The product or service receives high marks for performance, functionality, and reliability at every stage of the life cycle
Product Differentiation	The product or service has carved out a market niche, whether based on price, quality, or uniqueness of offering (or some combination of the three) that another company cannot easily duplicate
Technology Leverage	Demonstrated commitment to incorporating leading-edge technologies into product offerings, for greater product performance and value
Price/Performance Value	Products or services offer the best value for the price, compared to similar offerings in the market
Customer Purchase Experience	Customers feel they are buying the most optimal solution that addresses both their unique needs and their unique constraints
Customer Ownership Experience	Customers are proud to own the company's product or service, and have a positive experience throughout the life of the product or service
Customer Service Experience	Customer service is accessible, fast, stress-free, and of high quality

Best Practices Recognition: 10 Steps to Researching, Identifying, and Recognizing Best Practices

Frost & Sullivan Awards follow a 10-step process to evaluate Award candidates and assess their fit with best practice criteria. The reputation and integrity of the Awards are based on close adherence to this process.

STEP	OBJECTIVE	KEY ACTIVITIES	OUTPUT
1 **Monitor, target, and screen**	Identify Award recipient candidates from around the globe	• Conduct in-depth industry research • Identify emerging sectors • Scan multiple geographies	Pipeline of candidates who potentially meet all best-practice criteria
2 **Perform 360-degree research**	Perform comprehensive, 360-degree research on all candidates in the pipeline	• Interview thought leaders and industry practitioners • Assess candidates' fit with best-practice criteria • Rank all candidates	Matrix positioning of all candidates' performance relative to one another
3 **Invite thought leadership in best practices**	Perform in-depth examination of all candidates	• Confirm best-practice criteria • Examine eligibility of all candidates • Identify any information gaps	Detailed profiles of all ranked candidates
4 **Initiate research director review**	Conduct an unbiased evaluation of all candidate profiles	• Brainstorm ranking options • Invite multiple perspectives on candidates' performance • Update candidate profiles	Final prioritization of all eligible candidates and companion best-practice positioning paper
5 **Assemble panel of industry experts**	Present findings to an expert panel of industry thought leaders	• Share findings • Strengthen cases for candidate eligibility • Prioritize candidates	Refined list of prioritized Award candidates
6 **Conduct global industry review**	Build consensus on Award candidates' eligibility	• Hold global team meeting to review all candidates • Pressure-test fit with criteria • Confirm inclusion of all eligible candidates	Final list of eligible Award candidates, representing success stories worldwide
7 **Perform quality check**	Develop official Award consideration materials	• Perform final performance benchmarking activities • Write nominations • Perform quality review	High-quality, accurate, and creative presentation of nominees' successes
8 **Reconnect with panel of industry experts**	Finalize the selection of the best-practice Award recipient	• Review analysis with panel • Build consensus • Select recipient	Decision on which company performs best against all best-practice criteria
9 **Communicate recognition**	Inform Award recipient of Award recognition	• Present Award to the CEO • Inspire the organization for continued success • Celebrate the recipient's performance	Announcement of Award and plan for how recipient can use the Award to enhance the brand
10 **Take strategic action**	Upon licensing, company is able to share Award news with stakeholders and customers	• Coordinate media outreach • Design a marketing plan • Assess Award's role in future strategic planning	Widespread awareness of recipient's Award status among investors, media personnel, and employees

The Intersection between 360-Degree Research and Best Practices Awards

Research Methodology

Frost & Sullivan's 360-degree research methodology represents the analytical rigor of our research process. It offers a 360-degree-view of industry challenges, trends, and issues by integrating all 7 of Frost & Sullivan's research methodologies. Too often companies make important growth decisions based on a narrow understanding of their environment, leading to errors of both omission and commission. Successful growth strategies are founded on a thorough understanding of market, technical, economic, financial, customer, best practices, and demographic analyses. The integration of these research disciplines into the 360-degree research methodology provides an evaluation platform for benchmarking industry participants and for identifying those performing at best-in-class levels.

360-DEGREE RESEARCH: SEEING ORDER IN THE CHAOS

About Frost & Sullivan

Frost & Sullivan, the Growth Partnership Company, enables clients to accelerate growth and achieve best-in-class positions in growth, innovation and leadership. The company's Growth Partnership Service provides the CEO and the CEO's Growth Team with disciplined research and best practice models to drive the generation, evaluation and implementation of powerful growth strategies. Frost & Sullivan leverages more than 50 years of experience in partnering with Global 1000 companies, emerging businesses, and the investment community from 45 offices on six continents. To join our Growth Partnership, please visit http://www.frost.com.