

Disease Landscape & Forecast Overview

Quick Start Guide

February 2022



What is Disease Landscape & Forecast?

Disease Landscape & Forecast is part of a suite of Clarivate DRG applications and provides market intelligence and detailed market insights for the Biopharma and Biotech industries supported by detailed primary and secondary research. Report highlights:

- ✓ 10-year, annualized forecasts of drug-level sales and patient shares of key therapies segmented by brands/generics. Updated monthly.
- ✓ Disease-specific top-to-bottom epidemiology background, including etiology and pathophysiology, key populations, current and future therapeutic landscape and the market trajectory
- ✓ Supported by primary research interviews of KOLs and providers across G7 countries as well as by secondary research by in-house experts

Disease Landscape & Forecast Key Benefits and Uses

- ✓ Evaluate market potential for your pipeline assets and those of your competitors
- ✓ Gauge the commercial outlook and impact of key market events on currently marketed drugs and those in R&D
- ✓ Optimize your long-term disease and development strategy, including drug lifecycle management
- ✓ Understand a disease from top to bottom, including etiology and pathophysiology, key populations, current and future therapeutic landscape and market trajectory

Clarivate DRG Platform Login

To login to the DRG Clarivate platform, click on - <https://authentication.decisionresourcesgroup.com/login/Solutions>

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Welcome to Clarivate DRG

Whether you are a new or existing user, enter your email address

Having problems? Email DRG.support@clarivate.com

***You may be asked for a password if your company is not integrated with the DRG platform**

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Get started using Disease, Company & Drug Insights Platform

Clarivate | DRG About Us Contact Us

Welcome [redacted] from Clarivate

Hover over any link to learn more about each product platform. Green check marks indicate partial or full content is available to you as part of your current subscription.

Have a question? **2** Please contact us

Understand the Market

- Disease, Company & Drug Insights**
 - ✔ Disease, Company & Drug Insights Platform
 - Disease Insights
 - Epidemiology
 - Biosimilars
 - Company and Drug Insights
- Medtech
 - ✔ Medtech Insights Platform
 - Market Insights (Medtech 360)
 - Brand Tracking (Pricetrack & Marketrack)
 - US Medical Supply Distribution
- US Market Access Insights
 - ✔ US Market Access Insights Platform
 - Health Plan Analysis
 - Market Overviews
 - Market Overview Interactive Database
 - National MCO Analyzer
 - Power Profiles

Optimize Access

US Formulary Data & Analytics
By Fingertip Formulary

- ✔ Account Management Dashboard
- ✔ Fingertip Accounts
- ✔ Fingertip Alerts
- ✔ Fingertip Analytics
- ✔ Fingertip Home Page (Legacy Platforms)
- ✔ Fingertip Restrictions
- ✔ Fingertip Validation Tool
- ✖ Fingertip PolicyTrack

US Lives Data & Analytics

- ✔ Employer Vantage (2020 Data)
- ✔ Employer Vantage (2021 Data)
- ✔ Integrated Payer Platform
- ✔ Managed Market Surveyor Suite (Including Pharmacy Benefit Evaluator)

Global Market Access

Engage Customers

Sales Enablement

- ✔ Fingertip Publisher

Commercial Targeting

- ✔ Healthbase
- ✔ Medtech Insights Platform
 - Commercial Targeting (Procedure Finder)
- ✖ Field Force Navigator (FFN)

Digital/Multichannel Stakeholder Engagement

- ✔ Digital Insights Platform
 - Multichannel Physician Engagement
 - Multichannel Patient Engagement
 - Multichannel Payer Engagement

1.
Go to:
<https://authentication.decisionresourcesgroup.com/login>

2.
Upon login screen, use your work e- mail address and password to login. If you experience any issues, please contact DRG.support@clarivate.com

3.
Click on the “Disease, Company & Drug Insights” link.

Disease, Company & Drug Insights Home Page

The screenshot shows the Clarivate DRG website interface. A modal window titled "Disease Landscape & Forecast" is open, displaying the following content:

Disease Landscape & Forecast
Comprehensive market intelligence and actionable insights help you optimize your long-term disease strategy

Geographic Coverage: U.S., EU5, Japan

Forecast: 10-year, annualized, drug-level sales and patient share

Primary Research: Country-specific KOL interviews supplemented with survey data

Epidemiology: Diagnosed prevalent and drug-treated cases by country

Emerging Therapy Coverage: Key Phase II, III and PR products and select preclinical and Phase I products

Recently Viewed | Clear

- Psoriasis
- Non-Small-Cell Lung Cancer
- Neuropathic Pain
- Breast Cancer
- Obesity/Overweight
- Rare Diseases and Orphan Dr...
- Systemic Lupus Erythematosus
- Axial Spondyloarthritis
- Ulcerative Colitis
- Asthma

[Browse diseases and topics](#)

The background page features a search bar with the text "you looking for today?" and a search icon. Below the search bar is a "Multichannel Engagement" section. On the left, there is a navigation menu with the following items:

- Disease Landscape & Forecast [Learn more](#)
- Niche & Rare Disease Landscape & Forecast
- Biosimilars
- China In-Depth
- Company & Drug Insights
- Cortellis Supply Chain Network

On the right, there are two main sections:

- Patient Populations**
 - Epidemiology
 - Epidemiology Data Slicer
- Treatment Analysis**
 - Current Treatment Physician Insights
 - Unmet Need
 - Treatment Algorithms Claims Data Analysis

A blue question mark icon is located in the bottom right corner of the page.

1. Hover over "Disease Landscape & Forecast / Learn more" link to view product highlights as well as links to recently viewed reports. Select Browse diseases and topics to jump to Disease Landscape & Forecast landing page

Disease Landscape & Forecast Filters Page

The screenshot displays the Clarivate DRG interface for the Disease Landscape & Forecast filters page. The page is annotated with four numbered callouts:

- 1:** Ownership, Product type, and Geography filters.
- 2:** Recently viewed section, specifically highlighting 'Non-Small-Cell Lung Cancer'.
- 3:** The search bar labeled 'Type a disease or topic'.
- 4:** The 'What's covered?' dropdown menu, which is open to show a list of content items. The items are categorized by ownership status: 'At a Glance', 'Landscape & Forecast', 'Epidemiology', 'Current Treatment', 'Unmet Need', 'Access & Reimbursement', and 'Geographic Focus: China' are marked with green checkmarks (owned), while 'Overview' and 'Disease Landscape & Forecast' are marked with red padlocks (not subscribed).

Search Options:

1. Add Ownership, Product Type or Geography filters to narrow your search

2. Select recently viewed disease topic or select from directory

3. Type in partial word search to bring up possible matches

4. Select "What's covered?" to see what content is owned (green checks) vs not subscribed (red padlocks)

Disease Landscape & Forecast Report

The screenshot shows the Clarivate DRG interface for a Disease Landscape & Forecast Report on Non-Small-Cell Lung Cancer. The interface is divided into several sections:

- Navigation:** A top navigation bar with "Home / Diseases / Non-Small-Cell Lung Cancer" and a "Notifications Off" indicator. Below this is a secondary navigation bar with tabs: "At a Glance", "Landscape & Forecast" (selected), "Epidemiology", "Current Treatment", "Unmet Need", "Access & Reimbursement", "Geographic Focus: China", and "Meet The Team".
- Table of Contents (3):** A sidebar on the left with a search bar and a list of sections. The "Disease Landscape & Forecast" section is highlighted with a green checkmark and a blue box labeled "1". Other sections include Key Updates, Key Findings, Market Outlook, Forecast, Etiology and Pathophysiology, Epidemiology, Current Treatment, Unmet Need Overview, Emerging Therapies, Access and Reimbursement Overview, Methodology, and Appendix.
- Key Updates:** The main content area features a "Key Updates" section, last updated on 17 January 2022. It includes a "Q1 2022" sub-section with three bullet points:
 - Clarivate updates its NSCLC market forecast to include news on clinical data, important regulatory announcements, and new agents that have entered the late-phase development pipeline for NSCLC.** The market impact of these clinical, developmental, and regulatory events is further discussed in the "Current Treatment," "Emerging Therapies," and "Market Outlook" sections.
 - Keytruda shows efficacy as adjuvant treatment for resectable stage IB-IIIa NSCLC, regardless of PD-L1 expression.** The Phase III KEYNOTE-091/PEARLS trial is evaluating Keytruda as an adjuvant therapy for stage IB-IIIa NSCLC after complete resection. DFS in the overall population and in NSCLC with TPS, PD-L1 ≥ 50% are the dual primary endpoints of this European trial, for which Merck & Co. is collaborating with ETOPE and EORTC. In January 2022, Keytruda met one of its dual primary endpoints of DFS among resectable stage IB-IIIa NSCLC, regardless of PD-L1 expression. Interestingly, the primary endpoint of DFS in NSCLC patients whose tumors are PD-L1-high (TPS, PD-L1 ≥ 50%) was not met. The company announced that the results will be presented at an upcoming medical conference and will be submitted to regulatory authorities.
 - The EC grants conditional marketing authorization to Amgen's Lumykras for the treatment of previously treated metastatic NSCLC with a KRAS p.G12C mutation.** Lumykras is a selective small-molecule inhibitor of the KRAS G12C oncoprotein. This approval is based on data from the Phase II CodeBreak-100 trial. The KRAS p.G12C mutation occurs in approximately 11-13% of NSCLC adenocarcinoma patients and is believed to be the most common KRAS mutation (Dunnet-Kane V, 2021; Scheffler M, 2019). Lumykras is the first-in-class targeted therapy for the treatment of KRAS p.G12C-positive NSCLC in Europe.
 - The FDA grants RTD status to AbbVie's anti-c-MET ADC telisotuzumab vedotin for previously treated EGFR wild-type metastatic nonsquamous NSCLC patients with high tumor MET expression whose disease has progressed on or after platinum-based chemotherapy.** This designation was based on encouraging interim analysis safety and efficacy data from the Phase II LUMINOSITY trial. The company plans to initiate the pivotal Phase III TeliMET NSCLC-01 trial evaluating telisotuzumab vedotin versus docetaxel in previously treated EGFR wild-type metastatic nonsquamous NSCLC with high tumor MET protein expression.
- Downloads (2):** A sidebar on the right titled "Downloads" with two sections: "MAIN CONTENT" and "ADDITIONAL FILES". The "MAIN CONTENT" section lists:
 - Disease Landscape & Forecast Full Report
 - NSCLC - Key Findings Attachment
 - Market Forecast Assumptions Attachment
 - Market Forecast Dashboard Attachment
 The "ADDITIONAL FILES" section lists:
 - Disease Landscape & Forecast Table of Contents
 - All Figures
 - All Tables
- Meet the Team:** A section at the bottom right with a profile for Arman Esfandjari, including a question mark icon.

1. DL&F Table of contents

2. Reports can be downloaded by selecting the files of interest. The accompanying PowerPoint diagrams and Excel tables can be downloaded as separate documents.

3. Type in partial word search to bring up possible matches in the report (word matches highlighted in yellow in report)

Market Forecast Dashboard & Assumptions

Clarivate™ | DRG Biopharma Search within Biopharma

Home / Diseases / **Non-Small-Cell Lung Cancer** Notifications Off

At a Glance Landscape & Forecast Epidemiology Current Treatment Unmet Need Access & Reimbursement Geographic Focus: China Meet The Team

Table of contents Expand all

Search within Content

- Overview
- Disease Landscape & Forecast**
 - Key Updates
 - Key Findings
 - Market Outlook
 - Forecast
 - Etiology and Pathophysiology
 - Epidemiology
 - Current Treatment
 - Unmet Need Overview
 - Emerging Therapies
 - Access and Reimbursement Overview
 - Methodology
 - Appendix

Key Updates

Last updated 17 January 2022

Q1 2022

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Downloads

MAIN CONTENT

- Disease Landscape & Forecast Full Report
- NSCLC - Key Findings Attachment
- Market Forecast Assumptions Attachment**
- Market Forecast Dashboard Attachment**

ADDITIONAL FILES

- Disease Landscape & Forecast Table of Contents
- All Figures
- All Tables

Meet the Team

Arman Esfandiari

1. Click on “Market Forecast Assumptions” (MFA) and “Market Forecast Dashboard” to view forecast reports. MFA is a great resource for understanding all the assumptions that went into the forecast.

Market Forecast Assumptions

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Welcome to Clarivate's Market Forecast Assumptions file for NSCLC!
 This flat file provides a comprehensive view of Clarivate's 10-year, annualized, patient-based market forecast assumptions for NSCLC, including epidemiology, drug-treatable and drug-treated estimates, cycles, compliance, patient share, pricing, generic / biosimilar erosion, and resulting drug sales for all countries and populations included in this study. The data underlying this tool are identical to those found in the corresponding Market Forecast Dashboard Excel deliverable that accompanies this *Disease Landscape & Forecast* title.

About Our Bottom-Up, Patient-Based Market Forecasts
 Disease- and therapy-area-aligned analysts at Clarivate create each *Disease Landscape & Forecast* market model. We build our patient-based model upon our gold-standard epidemiology, which is provided by Clarivate's dedicated team of in-house epidemiologists. We update our bottom-up market forecasts as needed during a 12-month report cycle as important drug development and market events unfold.

How to Navigate the Geography Tabs
 Each country / region tab presents key data from our forecast.
 - Scroll horizontally to see the assumptions for all forecast variables that generate sales at the drug and class level.
 - Scroll vertically to see our forecast in each clinically and commercially relevant patient population / segment.
 - Use the grouping tool to expand or collapse for easier navigation and viewing.

Forecast Data By Drug											
Sales (\$M)											
Total Indication	Y0	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
	1,675.4	1,623.2	1,663.9	1,729.8	1,860.8	2,058.4	2,189.0	2,258.6	2,290.3	2,319.6	2,347.7
Drug Class 1	480.6	484.0	501.7	548.9	665.9	846.4	958.8	1,011.1	1,026.7	1,040.1	1,053.7
Drug 1	1.4	1.4	1.4	1.4	1.4	1.4	1.5	1.5	1.5	1.5	1.5
Brand	-	-	-	-	-	-	-	-	-	-	-
Generic	1.4	1.4	1.4	1.4	1.4	1.4	1.5	1.5	1.5	1.5	1.5
Drug 2	153.2	148.1	150.4	152.0	157.2	160.6	165.5	167.8	169.7	171.7	173.6
Brand	31.8	21.5	21.8	22.1	22.8	23.3	24.0	24.4	24.6	24.9	25.2
Generic	121.4	126.6	128.5	129.9	134.3	137.3	141.5	143.5	145.1	146.7	148.4
Drug Class 2	1,194.7	1,139.2	1,162.3	1,180.9	1,194.9	1,212.0	1,230.2	1,247.5	1,263.6	1,279.5	1,293.9
Drug 3	630.6	643.9	656.9	667.6	675.7	686.3	697.0	706.9	716.0	724.9	733.0
Brand	381.4	389.4	397.3	403.7	408.7	415.1	421.5	427.5	433.0	438.4	443.3
Generic	249.2	254.5	259.6	263.8	267.1	271.2	275.5	279.4	283.0	286.5	289.7
Segment 1	97.1	96.5	98.8	149.9	333.0	552.4	690.4	819.6	962.5	1,016.9	887.1

Patient Share								
Total Indication	Y0	Y1	Y2	Y3	Y4	Y5	Y6	Y7
	110.3%	110.6%	110.9%	110.9%	110.7%	110.4%	110.4%	110.4%
Drug Class 1	39.9%	39.9%	39.8%	39.8%	39.8%	39.7%	39.7%	39.7%
Drug 1	5.6%	5.6%	5.6%	5.6%	5.5%	5.4%	5.4%	5.4%
Brand	-	-	-	-	-	-	-	-
Generic	5.6%	5.6%	5.6%	5.6%	5.5%	5.4%	5.4%	5.4%
Drug 2	34.3%	34.3%	34.3%	34.2%	34.3%	34.3%	34.3%	34.3%
Brand	0.3%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%
Generic	34.0%	34.1%	34.1%	34.0%	34.1%	34.0%	34.1%	34.1%
Drug Class 2	70.4%	70.8%	71.0%	71.1%	70.9%	70.7%	70.7%	70.7%
Drug 3	35.6%	35.7%	35.9%	35.9%	35.8%	35.8%	35.9%	35.9%
Brand	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%
Generic	33.8%	33.9%	34.1%	34.1%	34.1%	34.0%	34.1%	34.1%
Segment 1	105.0%	107.0%	109.0%	107.0%	103.0%	103.0%	103.0%	103.0%

1. Market Forecast Assumptions consists of 5 informational tabs (Contact Us, Introduction, Recent Forecast Changes, Methodology and Approach, Key Events and Assumptions) and 9 report tabs (US, France, Germany, Italy, Spain, UK, Europe, Major Markets)

Use the grouping function to collapse / expand data

Scroll horizontally to see all forecast variables at the drug and class level

Scroll vertically to see forecasts for each DRUG

1

Market Forecast Assumptions

1

1 2 3 4

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** Scroll to our "Forecast by Regimen" section for Cycles, Compliance, and Price per Cycle data.

Forecast Data By Drug												
Sales (\$M)												
	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	
Total Non-Small-Cell Lung Cancer	12,507.49	15,020.42	16,845.22	18,688.17	20,822.96	22,999.83	24,950.51	26,350.39	27,099.09	27,131.94	26,803.76	
Adeno stage IB and II	35.60	51.93	90.11	184.96	335.74	519.26	707.99	865.68	1,003.10	1,072.09	1,133.79	
Adeno stage III	566.50	605.20	677.48	796.47	939.80	1,166.38	1,320.07	1,503.74	1,631.69	1,625.08	1,610.49	
Adeno stage IV 1st line	5,763.69	7,200.51	8,081.80	8,773.31	9,383.14	9,931.17	10,501.31	10,798.67	10,806.16	10,620.72	10,312.14	
Adeno stage IV 2nd line	1,108.26	1,205.49	1,279.04	1,424.89	1,707.40	1,974.31	2,159.01	2,355.88	2,484.33	2,589.08	2,641.09	
Adeno stage IV 3rd line	200.02	222.16	245.36	294.84	408.17	562.82	697.05	749.95	855.16	933.38	983.50	
LC/O unverified histology stage IB and II	10.85	15.99	27.25	55.55	100.19	154.37	209.36	254.90	293.75	312.38	329.24	
LC/O unverified histology stage III	194.84	207.08	230.67	269.66	316.50	391.01	440.52	499.80	539.38	535.83	529.68	
LC/O unverified histology stage IV 1st line	2,010.17	2,490.02	2,775.57	2,993.18	3,184.65	3,352.93	3,528.61	3,610.99	3,596.04	3,522.56	3,407.52	
LC/O unverified histology stage IV 2nd line	386.44	416.87	439.27	486.35	579.50	666.56	725.46	787.79	826.73	858.72	872.72	
LC/O unverified histology stage IV 3rd line	69.84	76.92	84.33	100.63	138.55	190.13	234.33	250.88	284.68	309.67	325.07	
SQ stage IB and II	5.88	9.68	24.52	52.08	106.51	158.93	216.85	294.21	339.44	374.52	394.60	
SQ stage III	316.08	330.51	361.38	427.57	486.76	567.82	662.41	767.85	818.49	808.79	793.68	
SQ stage IV 1st line	1,387.86	1,734.87	2,065.08	2,344.27	2,541.37	2,685.30	2,767.31	2,820.46	2,836.35	2,785.07	2,711.27	
SQ stage IV 2nd line	373.52	375.84	380.92	395.27	482.22	534.51	595.71	599.95	592.69	590.24	572.10	
SQ stage IV 3rd line												

Forecast Data By Regimen													
Sales (\$M)													
	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030		
Total Non-Small-Cell Lung Cancer													

Contact Us | Introduction | Recent Forecast Changes | Methodology and Approach | Key Events and Assumptions | **United States** | France | Germany | Italy | Spain | United Kingdom | Japan | Europe | Major Markets

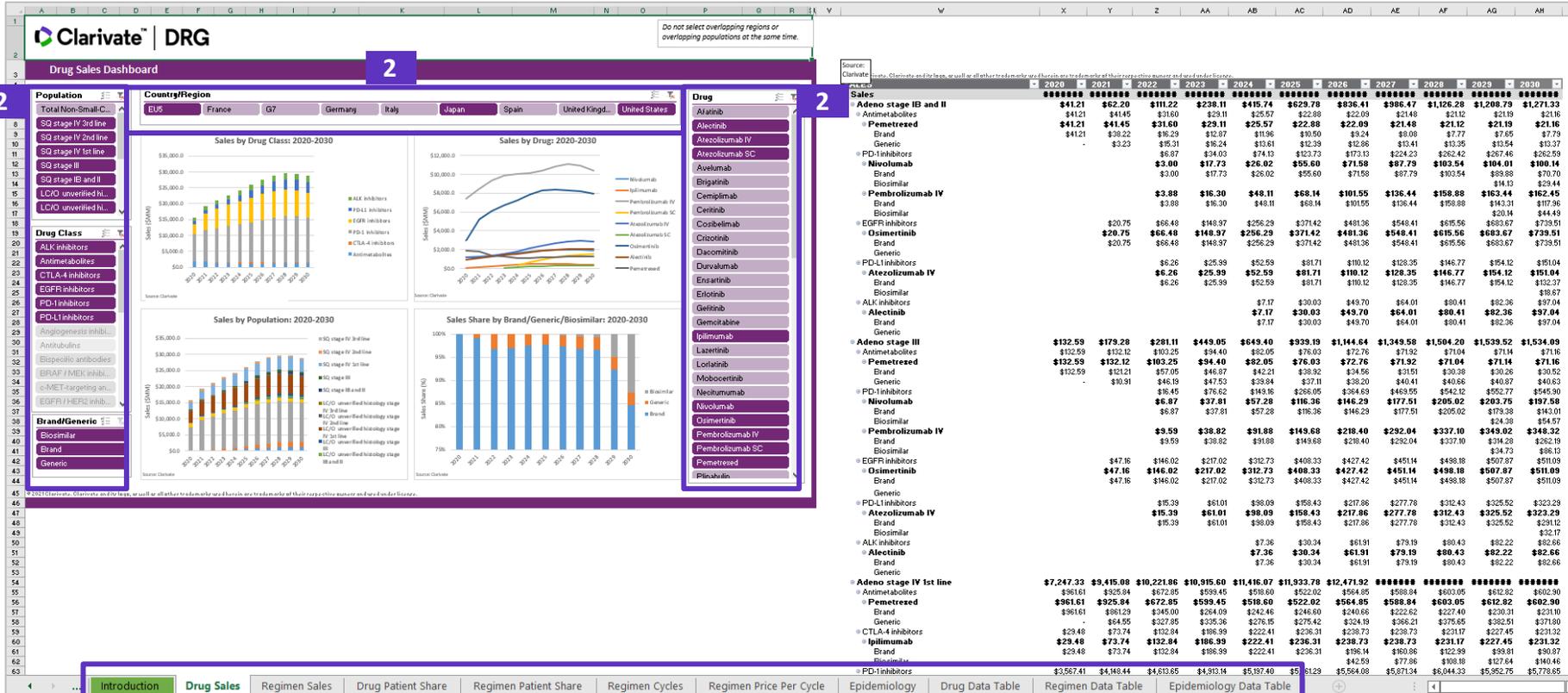
Country report includes drug forecasts by:

- Drug sales
- Patient share
- Treatment regimen (oncology)
- Treated population
- Compliance
- Price per treatment cycle

1. Use pivot buttons to expand views to include:

- 1 - Sales by drug treatable sub populations
- 2 - Drug classes
- 3 - Specific brands/molecules
- 4 - Generic and biosimilar erosion

Market Forecast Dashboard



1. The Dashboard report is based on the data in the Market Forecast Assumptions report. The Dashboard has 2 informational tabs and 10 report tabs:

- Drug sales
- Regimen sales
- Drug patient share
- Regimen patient share
- Regimen cycles
- Regimen price per cycle
- Epidemiology
- Drug data table
- Regimen data table
- Epidemiology data table

2. Click on country/region, population, drug filters as indicated. Hold down CTRL button to select multiple filters. Do not select overlapping country/regions



Alerts Request

The screenshot shows the Clarivate DRG interface. At the top, there is a navigation bar with the Clarivate logo, 'DRG', a dropdown menu for 'Biopharma', and a search bar. On the right, there are icons for 'Browse All', a notification bell (highlighted with a '1'), a chat icon, and a user profile icon. Below the navigation bar is a purple header with 'Home / My Favorite Topics' and a link to 'View My Notifications'. The main content area is divided into two sections: 'Diseases & Other Topics' and 'Medtech'. Under 'Diseases & Other Topics', there is a search bar and a list of medical conditions under three categories: 'Autoimmune & Inflammation', 'Respiratory', and 'Rheumatology'. A callout box with a '2' highlights the 'Email Preferences' section, which contains a checkbox for 'Email me when there is updated content or new content published matching my favorites' and a green 'Save Settings' button. A question mark icon is also present in the callout box.

1. To request email alerts of Disease Landscape & Forecast report key updates, select the bell icon

2. Select the disease markets that you are subscribed to, select the “Email Preferences” checkbox, then select the “Save Settings” button.

Support Requests

Clarivate™ | DRG Medtech Search within Medtech

Home / Devices / **Peripheral Vascular Devices** Notifications Off

At a Glance Market Insights Commercial Targeting Brand Tracking Meet The Team

Table of contents Expand all

Search within Content

GEOGRAPHIES

- Global Market Trends
- United States
 - Abstract
 - Executive Summary
 - COVID-19 Updates
 - Market Highlights
 - Competitive Highlights
 - Key Report Updates
 - COVID-19 Analysis
 - Peripheral Vascular Device Market
 - Peripheral Vascular Stent Market
 - PTA Balloon Catheter Market
 - Atherectomy Device Market
 - Embolic Protection Device Market
 - Chronic Total Occlusion Crossing Device Market
 - Peripheral Vascular Accessory Device Market
 - Thrombectomy and Thrombolysis Device Market
 - Surgical Graft Market

Executive Summary

Last updated 30 December 2021

COVID-19 Updates

The market forecast and qualitative analysis in this report incorporate the impact of the COVID-19 pandemic. In addition to updates to standard report content, this report contains a COVID-19 Analysis chapter that centralizes key insights related to pandemic's impact on the market and competitive landscapes.

Market Highlights

Factors Impacting the PV Device Market, by Product Type, US

Factor	Impact on Market								
	PV Stents	PTA Balloon Catheters	Atherectomy Devices	EPPDs	CTO Crossing Devices	PV Accessory Devices	Thrombectomy and Thrombolysis Devices	Surgical Grafts	Total Market
Positive Clinical Data	High	High	High	Medium	Low	Low	Medium	Low	High
Reimbursement	Low	High	High	Low	Low	Low	Medium	Low	High
Adoption of Premium-Priced Technology	High	High	Medium	Low	Medium	Medium	Medium	Low	Medium
Favorable Demographics	High	High	High	Low	Low	Low	Medium	Low	Medium

Downloads

MAIN CONTENT

- United States Full Report
- COVID-19 Methodology Attachment

ADDITIONAL FILES

- United States Table of Contents
- All Figures
- All Tables

Meet the Team

Xi Chen, PhD
Manager

Ask the Expert View Bio

1. If you have additional questions or training/support requests, select “Ask the Expert” or “Contact Us” located under the “?” (Resources & updates) icon.



Have a Question?

DRG.support@clarivate.com
clarivate.com

About Clarivate

Clarivate™ is a global leader in providing solutions to accelerate the lifecycle of innovation. Our bold mission is to help customers solve some of the world's most complex problems by providing actionable information and insights that reduce the time from new ideas to life-changing inventions in the areas of science and intellectual property. We help customers discover, protect and commercialize their inventions using our trusted subscription and technology-based solutions coupled with deep domain expertise. For more information, please visit clarivate.com.

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