Overview of the Oracle Life Sciences Market in Asia-Pacific

Dr. Letian Liu Sunil G. Singh DBMS Consulting 6 October 2009 Asia Pacific focus group Session 15 **Acknowledgements**

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- Many thanks to the OCUG Planning and Review Committee and OCUG APAC Focus Group Chairs for their infinite patience in receiving and expeditious review of this presentation.
- Many thanks to everyone who participated in the development of presentation.

History of OLS in APAC

- CTCLS was the first Japanese-based customer who had OC installed.
 - They are the development partners of Oracle for the Japanese NLS option.
 - Later came Takeda, a research-based global pharmaceutical company, headquartered in Japan.
 - Yamanouchi pharmaceutical.
 - Other Japanese CROs.

History of OLS in APAC- continued

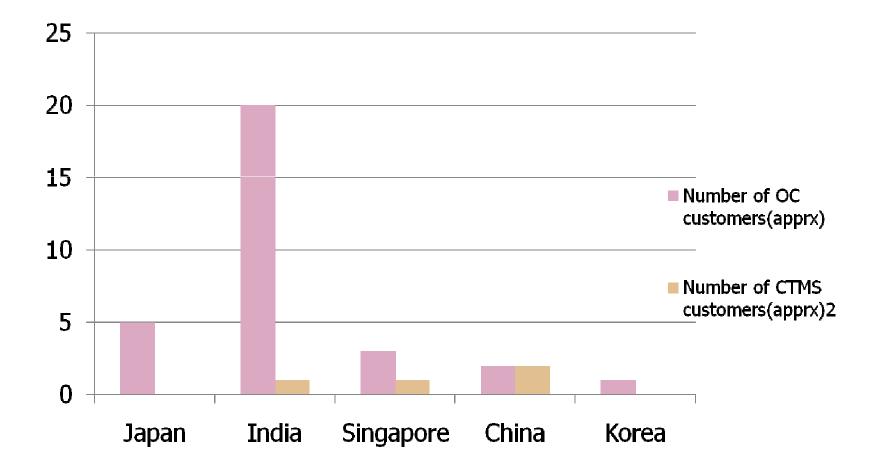
National Cancer Center of Singapore.

- Research purpose.
- Adapted the OC in 2000 with the OC 3.2.
- Migrated to the OC 4.5.3 in June 2009.
- Academia Sinica in Taiwan.
 - The first to use Chinese DE in RDC Classic Mode.
 - Some of the OC/RDC functionalty is not working, a detailed description was presented at OCUG 2005, which is also posted on the <u>www.clinicalserver.com</u> website.

History of OLS in APAC- continued

- Ranbaxy was the first OC customer in India.
 - Purchased OC by the end of the 2003 and implemented in 2004.
 - Leads to rapid growth OLS market in India.
 - Many OC experts in India now have prior experience and training from Ranbaxy.





Analysis

- General trend is for users to implement an Oracle Clinical (along with RDC/TMS in some cases) based solution first and then move to CTMS.
- The availability of CTMS Multi-language options makes it easier for non-English speaking customers to adapt a CTMS solution first.



- India experienced the fastest growth rate in the period of 2005 to 2008.
 - OC market is stabilized.
 - There is potential growth for CTMS space.

Healthcare reform in China

- China will spend \$124B USD on Healthcare reform in the next 3 years.
 - http://www.chinadaily.com.cn/bizchina/2009 -01/22/content 7418859.htm
 - About 8% of the \$124B will be spent in the clinical trial area.
 - There will be 26 GCP centers to be built and funded by the government.

The first GCP center adopted OLS

 With about 1 year of negotiation and business development. One of this 26 government funded GCP center has signed agreement to adopt Oracle Life Science solution.



Chinese version of RDC.

Though the RDC onsite CRF can be designed in Chinese and DE can be performed in Chinese, RDC onsite surround (what the site user sees) is still in English. This caused difficulties for the site user.

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OCUG 2009 New Orleans: APAC Focus Group; Overview of OLS in APAC

October 2009

PDR report can not displayChinese

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Immediate needs in China: AERS

- The direct submission module allows hospitals to log into the website to submit the ADRs
 - The new case triage can be published to the user with Chinese.
 - License structure need to be considered.
- General statistic analysis tool.
- Reporting in Chinese.

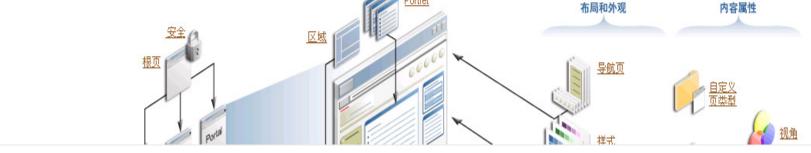
Immediate needs in China: AERS

- The current 10gAS architecture support the Chinese.
 - It is possible to develop the local language applications/tools in 10gAS.



Oracle 10g Portal in Chinese





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Oracle 10g Portal in Chinese

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AERS form is configurable in Chinese

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- India's OC market is the most mature in all of APAC, with high potential growth in the CTMS and AERS/ARGUS areas.
- Clinical solution (OC/TMS/RDC) will be quickly adopted amongst non-English speaking clinical research organizations following the introduction of local language support.
- With the introduction of local language support, AERS and ARGUS will experience rapid adoption in the government sector of emerging markets such as China, Taiwan, and Hong Kong.



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Biographies

Sunil G. Singh, President & CEO, DBMS Consulting, Inc.

 Sunil is a Global Oracle Health Sciences deployment expert for DBMS Consulting. He has been an active member of the OCUG community since 1996 and is extremely grateful for this opportunity to makes these presentations at OCUG 2009.

Dr. Letian Liu, VP, DBMS APAC, DBMS Consulting, Inc.

- Dr. Liu moved back after 16 years in the US to Shanghai in 2006, to head the Asia Pacific operations for DBMS Consulting. Dr. Liu brings in 20 years of experience with clinical trials and data-management, Pharmaceutical R&D and applied chemistry.
- Prior to joining DBMS Consulting, Dr. Liu was technical lead for Oracle Clinical/ePower with Covance, and Senior Architect for Oracle Clinical/TMS/RDC/ePower/AERS/IReview at Ingenix(i3); and as research scientist at REVLON. Dr. Lucy Liu holds a Ph.D. in Analytical Chemistry from The City University of New York, a BS degree in Engineering from Zhejiang University in China.

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