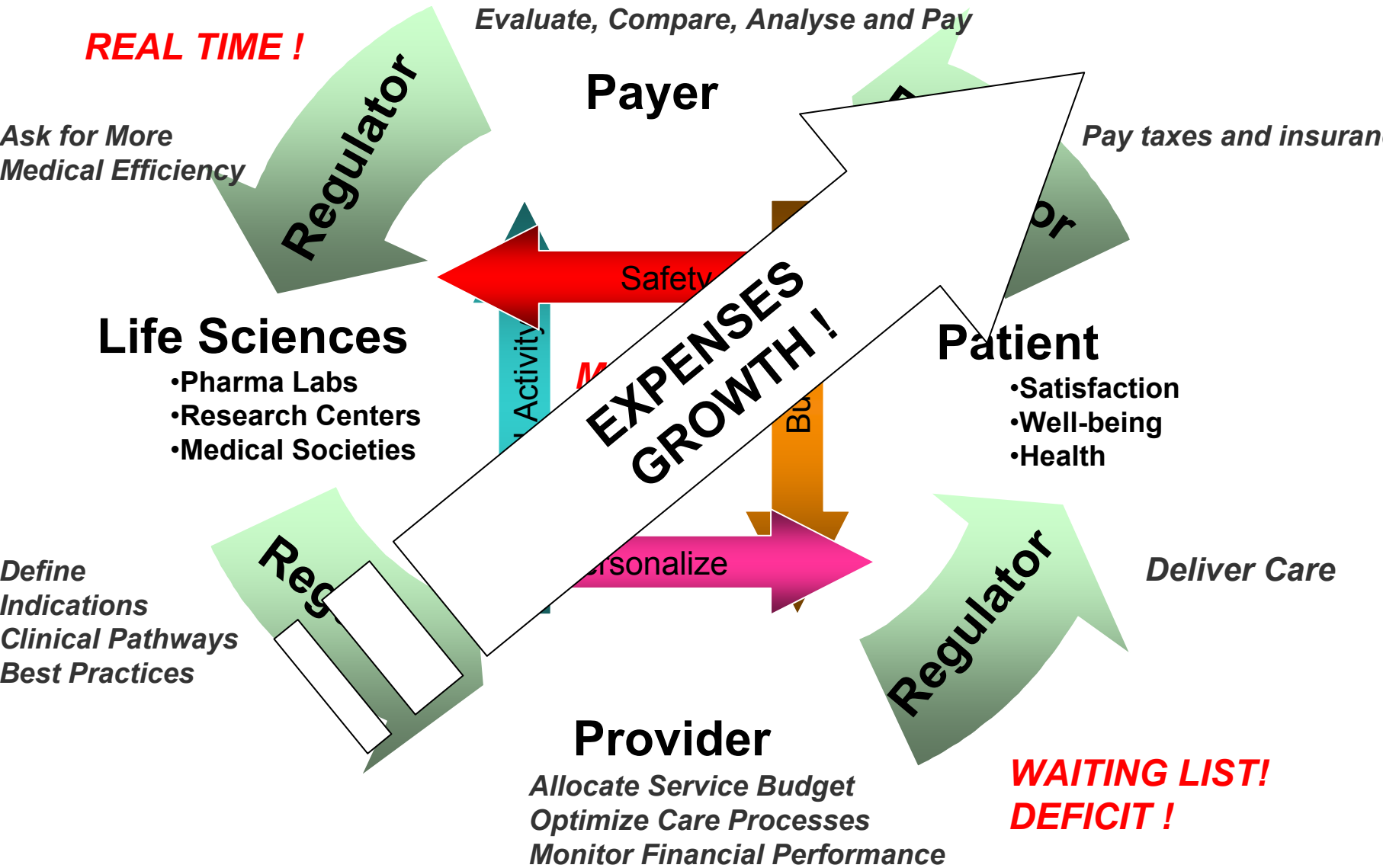# Jean-François Penciolelli

Director Business Development
Global Health Sciences
Oracle Corporation

Oracle in the Healthcare and Life Sciences Industry

Global Forum, Paris November 10th

Health & Life Sciences Ecosystem

REAL TIME !

Evaluate, Compare, Analyse and Pay

Payer

Ask for More
Medical Efficiency

Pay taxes and insurance

Regulator

Safety

EXPENSES GROWTH !

Life Sciences
- Pharma Labs
- Research Centers
- Medical Societies

Activity

M

Bu

Personalize

Patient
- Satisfaction
- Well-being
- Health

Define
Indications
Clinical Pathways
Best Practices

Reg

Deliver Care

Regulator

Provider

Allocate Service Budget
Optimize Care Processes
Monitor Financial Performance

WAITING LIST!
DEFICIT !

6 product families for the Healthcare & Life Sciences market

Business Intelligence: Analytics, Disco, OLAP

Third Party / Partner Applications
- **Clinical Suite**
- **Medication Management**
- **Chronic Disease Management**
- **Patient Safety alert**
- **Home care delivery**
- **HC transportation**
- **Public Health Reporting**
- **Health Insurance**

Oracle Payer Applications:
- **CRM**
- **Product definition**
- **Care purchasing**
- **Policy Management**
- **Claims processing**
- **Relationship Mngt**
- **Financials**

Oracle LifeSciences Applications:
- **CTMS**
- **CDR**
- **Oracle Clinical**
- **Adverse Event Reporting**
- **Thesaurus Management**
- **CRM**
- **Financials**
- **SCM**
- **Manufacturing**

Oracle Provider Applications:
- **Financial**
- **Human Resources**
- **Procurement, Order Mgt, SCM**
- **Sales**
- **Service**
- **Projects**
- **CRM**

Oracle Health Transaction Base (HTB)
- **Health Data Repository**
- **Application Development Platform**
- **Integration Platform**

Base technology
- **Database (incl. HC-specific options like DICOM support)**
- **Application Server (including Semantic Web)**
- **Collaboration Suite**
- **B2B integration (including HL7, DICOM)**

Oracle has a strong position in the Healtcare and Life Sciences market

- **Oracle is the leading worldwide database provider for payors and hospitals**

  – **In Europe 50% - 80% (depending on country) of all healthcare payors and providers use Oracle Technology**

- **More than 300 leading healthcare providers and more than 80 healthcare payors run Oracle applications**

- **Oracle is the leading provider of Clinical Trial Management Systems and Sales Force Automation in Life Sciences**

  – **15 of the top 20 Pharma companies use Oracle Clinical and Siebel CRM and SFA**

- **Oracle is the only company to offer a health data repository and integration platform based on the open standard HL7 v3 Reference Information Model (RIM)**
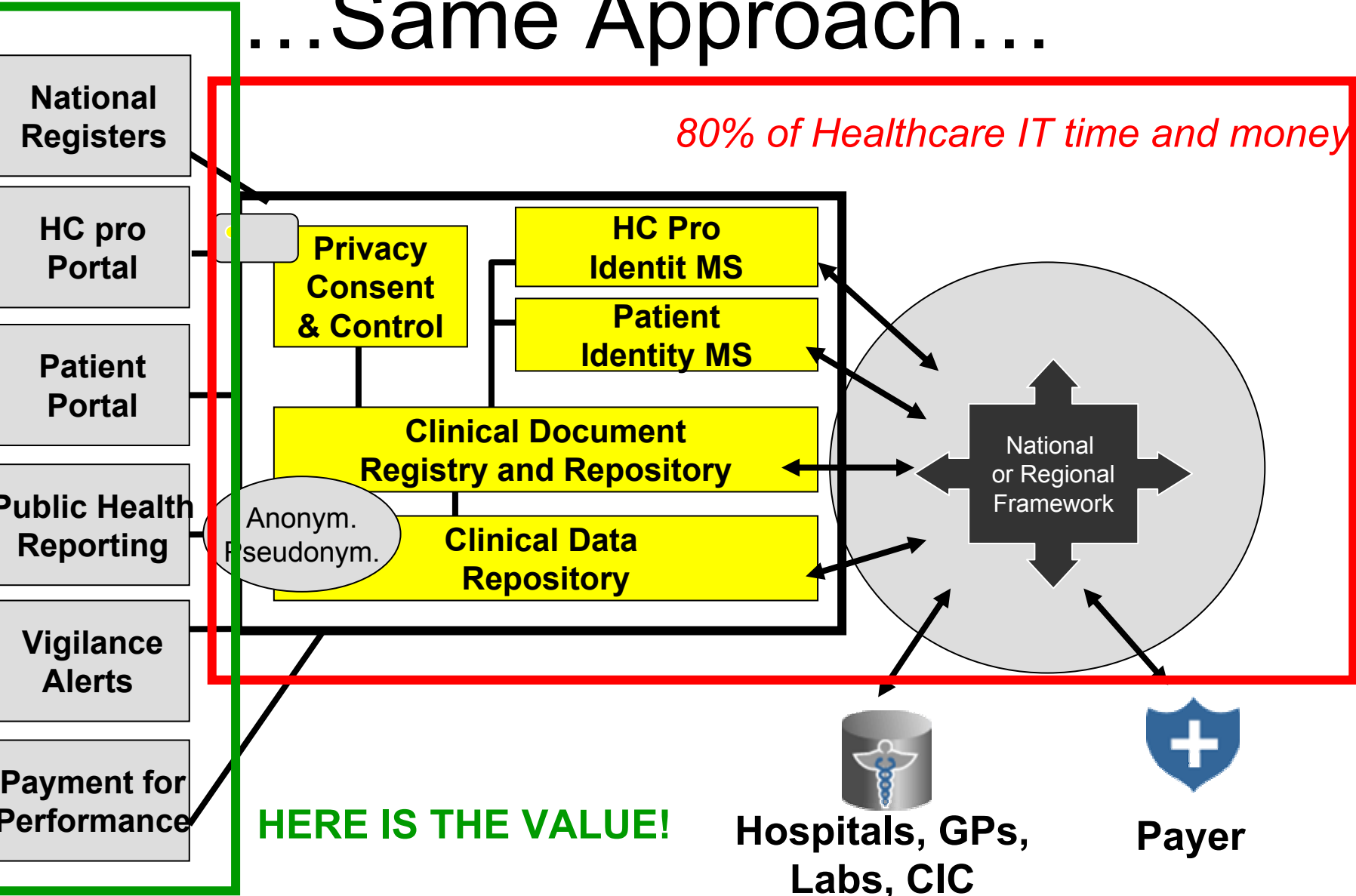
EMEA Provider Proof Points

- **Netherland** – E-Business Suite with Bussiness Flows
  - > 15 hospitals
    - OLVG
    - MC Haaglanden
- **France**
  - Hospices Civils de Lyon
  - CHU Montpellier
  - Montreuil
  - Claudius Regaud Institute
- **Belgium**
  - 4 hospitals
    - ZNA Antwerp
    - St Luc
    - La Citadelle

- **Italy**
  - > 30 Hospitals
    - ASL di Teramo, di Lodi, di Pavia, di Cantazaro....
    - AO Bianchi-Melacrino-Morelli, di Lodi, di Pavia….
    - OC di Legnano
    - Policlinica San Matteo di Pavia

- **United Kingdom Shared Services**
  - >200 Hospitals
    - Cardiff and Vale NHS Trust
    - University College London Hospital
    - Sandwell and City Hospitals
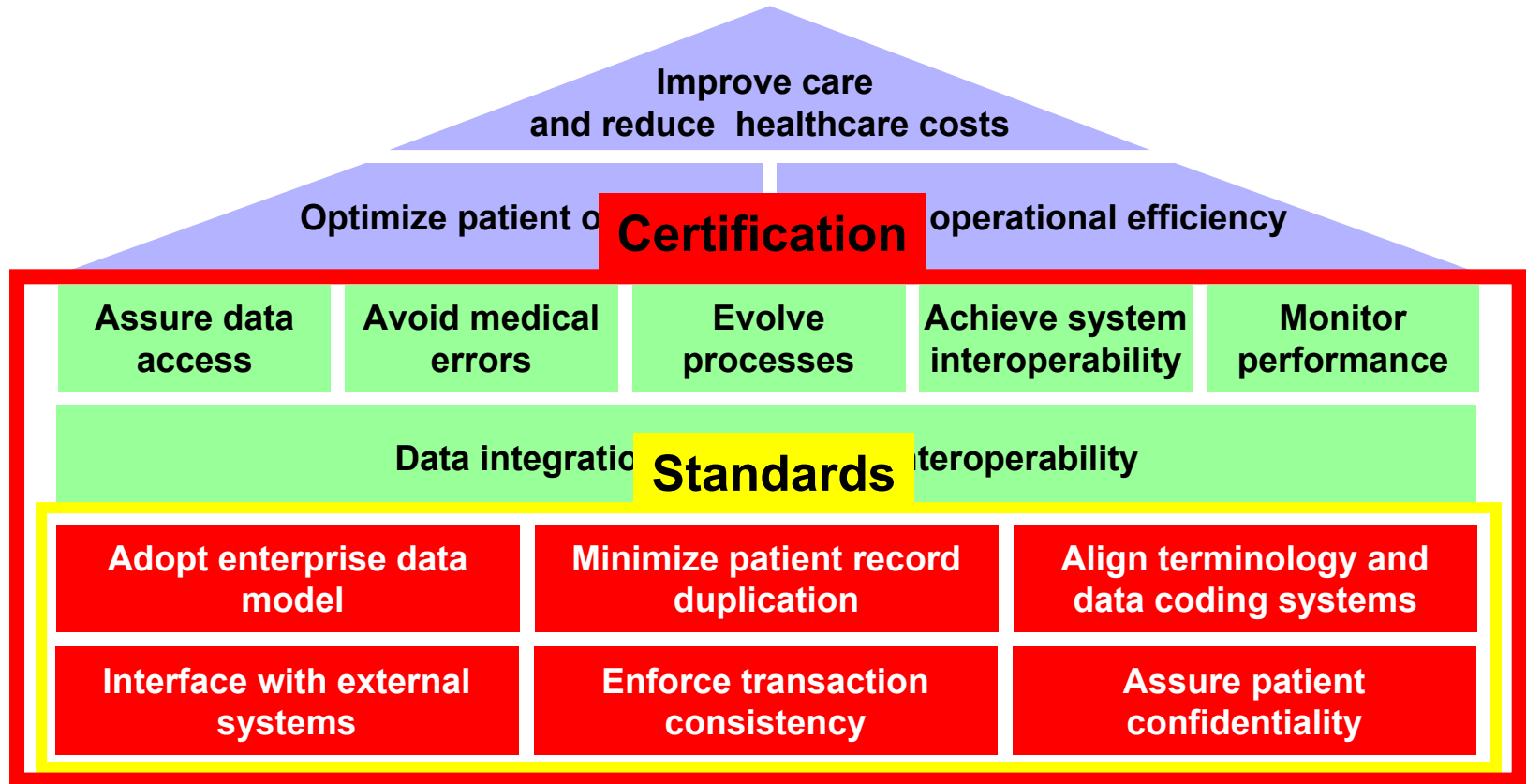 - NHS-ESR - 200 000 payrolls per month > 1.2 million payroll

…Healthcare Needs…

**Improve care
and reduce healthcare costs**

Optimize patient o [**Certification**] operational efficiency

Assure data access	Avoid medical errors	Evolve processes	Achieve system interoperability	Monitor performance

Data integratio [**Standards**] teroperability

Adopt enterprise data model	Minimize patient record duplication	Align terminology and data coding systems
Interface with external systems	Enforce transaction consistency	Assure patient confidentiality

…Industry Perspectives in EHR business…

An EHR is:

Portal/Security/Mobility

EMPI

Applications
Business Processes
Business Intelligence

Clinical
Data
Repository(ies)

Interface Engine
HL7/DICOM mapping

Terminology Services
Terminology loaders
Terminology mapping
Purchase terminologies

Message oriented middleware

WW EHR Proof Points

- **UK**
  - NHS-Connecting for Health
  - Biobank
  - Toumaz
- **France**
  - Accenture (DMP, DP)
  - Thalés/Cegedim (DMP, DP)
  - Indra (DMP)
  - Cerner (DMP)
  - Hippocad (HomeCare)
- **Germany/Austria**
  - T-Systems (bit4health, Vienna)
- **Sweden**
  - WM Data (Stockholm)
- **Spain/Portugal**
  - Indra (Diraya, Andalucia, Açores)
  - OrionHealth (Balearics)
- **Italy**
  - MoH
  - Lombardia Informatica
- **South Africa**
  - Arivia (National EHR)

- **Australia**
  - Health-e
- **Czeh**
  - Stapro (CEEQNet)
- **Croatia**
  - Ericsson (G1)
- **Lithuania**
  - HP
- **Hungary**
  - BT (HRFOP)
- **Greece/Malta/Cyprus**
  - Intracom
- **Slovenia**
  - Infonet/Marand
- **Canada**
  - Bell/Medisolution (Infoways)
  - Fujitsu/DMR (Infoways)
- **USA**
  - Cerner (Tennessee)
  - Accenture (Kentucky, Tennessee, West Virginia)
  - Northorp Grumman (Santa Cruz, Cincinnati, Cleveland)

ORACLE

Industry Expectations

- Learn about the others (US, Canada, Australia, UK, Belgium, Andalucia, Lombardia, Austria, Denmark) – highly replicable market

- Involve key decision makers (real buyers!) from Germany, Italy, Spain, UK, France because their decisions will shape the market

- Establish one set of EHR Certification Criteria (not like standards!)

- Adopt 2 or 3 technical frameworks worldwide compliant with these criteria

- These frameworks for EHRs will
    - increase the market size ($50Bn US, $8Bn EMEA in 2004) x2 by 2010
    - speed EHR implementation (average 10 years)
    - create a new HC IT industry on the top of these frameworks (existing like Cerner, McKesson, GE, Philips, Siemens, Isoft, Agfa and new players like Ocean Informatics, ScandiHealth, OrionHealth, Initiate, Custodix, Qmedit, Apelon, HealthLanguage, HealthOne, Healthe)

Jean-François Penciolelli

jean-francois.penciolelli@oracle.com

+33678416475