

2008 North American Market Leadership of the Year Award**Oracle**

The 2008 Market Leadership of the Year Award for the Clinical Trial Management Systems market is presented to Oracle. This Award is in recognition of the company's leadership initiatives and aggressive growth and business development strategies. These initiatives have enabled Oracle to sustain its position of strength and expand upon a strong foundation, resulting in exemplary leadership in the marketplace.

Market Overview

The Clinical trial management systems (CTMS) market refers to the integration of planning, execution and management of clinical trials across the different organizations and partners involved with the processes.

The major data points that are captured and integrated by CTMS include:

- Patient data
- Budgeting
- Billing
- Trial Protocol
- Regulatory forms and Research

CTMS products are designed to help in management of the following functions and drive the convergence of:

- Trial Management
- Site Management
- Investigation Management
- Clinical supply management

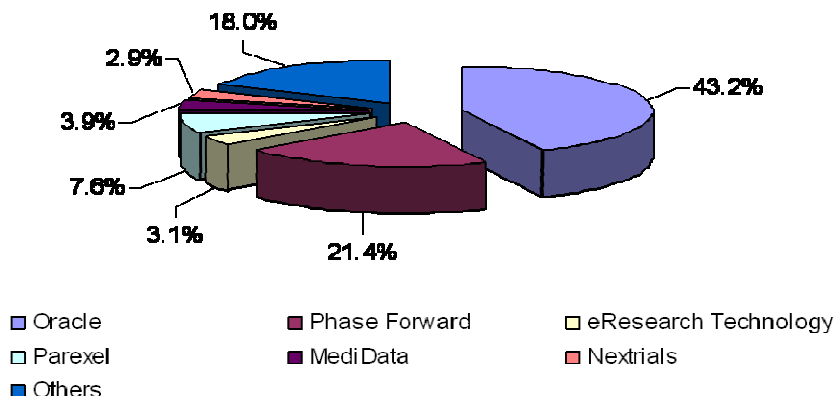
CROs are increasingly looking to technology as a means to shorten project times, improve data quality, and thus, differentiate services in a highly competitive environment. Many firms are now embracing systems whereby clinicians in different locations can simultaneously view and discuss data. This allows CRO staff to collaborate with clients, quicken the testing process, and sometimes contribute key information that enhances data quality. This helps in improving overall efficiency and shortening trial timelines, thus lowering overall cost through better utilization of resources.

Oracle: Leadership through Aggressive Growth & Business Development Strategies

Oracle is a leading software firm that provides a variety of products and services across industry verticals and business functions. Oracle has been a trend-setter in the industry through its leadership initiatives that are backed by a strong and aggressive growth and business development strategy. Oracle has a broad suite of applications that are designed to address the needs of a range of customer requirements. These applications have been built keeping several factors in mind that make it a highly customizable and comprehensive solution tool kit.

Oracle’s application portfolio is highly flexible and offers customers the option to implement a comprehensive suite of applications or build upon layers of applications as the company grows and expands. These applications have been carefully integrated around Oracle’s clinical management system through both internal development and acquisitions. The acquisition of Siebel in 2006, for example, continued Oracle’s development of its CTMS offerings.

Chart 1.1 shows the market share of major market participants in the U.S. CTMS markets in 2007.

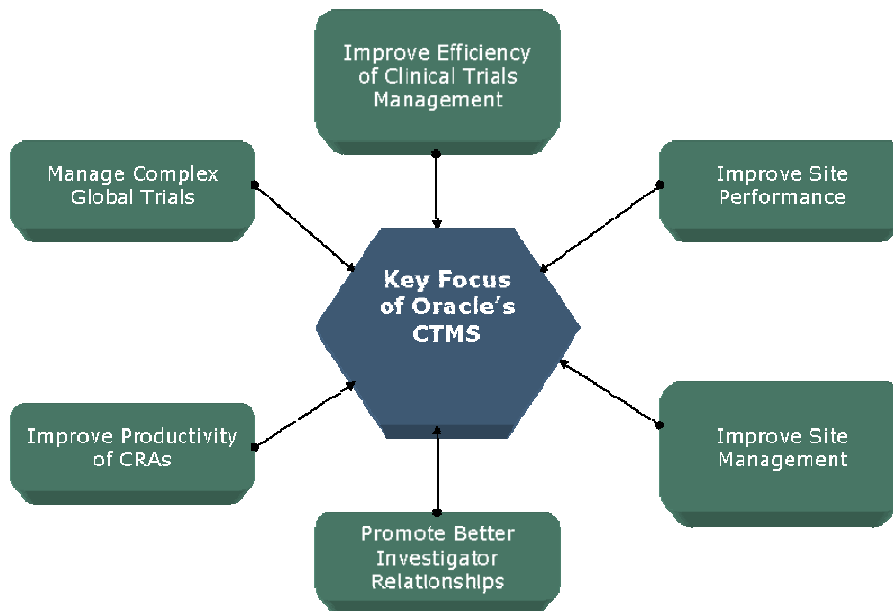


Source: Frost & Sullivan

Oracle has been able to establish and sustain its leadership position in the CTMS market by a significant margin. In 2004, Oracle’s share was 27.0 percent, closely followed by Phase Forward at 23.0 percent. However, through the Siebel acquisition, Oracle ensured market share growth through a strategic leveraging of synergies that existed between the two companies.

Innovative Offering Built Around Core Strengths

Chart 1.2 shows the key focus areas of Oracle's CTMS platform:



Oracle's CTMS platform is based on customer relationship management (CRM) solutions that manage various aspects of the clinical trials process, which is primarily the core strength of Oracle. Since it has built this product offering around its strength, Oracle has managed to establish and sustain its leadership in this market by continuing to focus on its core business. Since CRM involves managing the relationships between various people involved in the process, the approach offers an easy way to integrate and manage global trials.

In addition to CTMS, this software platform integrates seamlessly into Oracle's other applications for clinical development and feeds data into the Life Sciences Hub (LSH), which can then be used for analysis and reporting that companies are increasingly interested in. This highly flexible and customizable platform offers customers an easy choice when they scale up their business and addresses a variety of new challenges that might arise out of organic or inorganic growth strategies.

Conclusion

Oracle's product portfolio of electronic data capture (EDC), CTMS and clinical data management (CDM) is one of the most extensive and versatile offerings available in the market. This combined with Oracle's experience in handling a variety of customer challenges proves to be extremely valuable during product implementation and deployment.

Overall, Oracle is clearly distinguished from other CTMS vendors that either cater to a niche market or provide applications only for a fixed market segment such as big pharmaceutical companies, biotechnology or CROs. A testament to Oracle's success in the clinical development and pharmaceutical industry is the fact that 10 of the top 10 CROs and pharmaceutical companies run Oracle applications. Therefore, in recognition of Oracle's leadership in clinical trial management systems, Frost & Sullivan is pleased to present the organization with the 2008 Market Leadership of the Year Award.

Award Description

The Frost & Sullivan Award for Market Leadership of the Year is given to the company that has exhibited market share leadership through the implementation of market strategy. The recipient has displayed excellence in all areas of the market leadership process, including the identification of market challenges, drivers and restraints, as well as strategy development and methods of addressing these market dynamics. Furthermore, the Award recipient has continually demonstrated solutions for monitoring market changes and for implementing superior market strategies. By utilizing these strategies for success, the company has established itself as the market share leader in its respective industry.

Research Methodology

To choose the recipient of this Award, the analysts track competitor revenue and market share within the industry. This is achieved through interviews with market participants and extensive secondary research of proprietary data sources. Frost & Sullivan then presents the Award to the company that achieved the highest market share.

About Best Practices

Frost & Sullivan Best Practices Awards recognize companies in a variety of regional and global markets for demonstrating outstanding achievement and superior performance in areas such as leadership, technological innovation, customer service, and strategic product development. Industry analysts compare market participants and measure performance through in-depth interviews, analysis, and extensive secondary research in order to identify best practices in the industry.

About Frost & Sullivan

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