



Creating New Valuable Working Model Through Strategic Partnership With Clients

以战略合作伙伴为导向，创造价值服务的新模式

Sally Sha

BD Director of Tigermed

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Current thread of demanding of Clinical trials

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Valuable service provided for clients

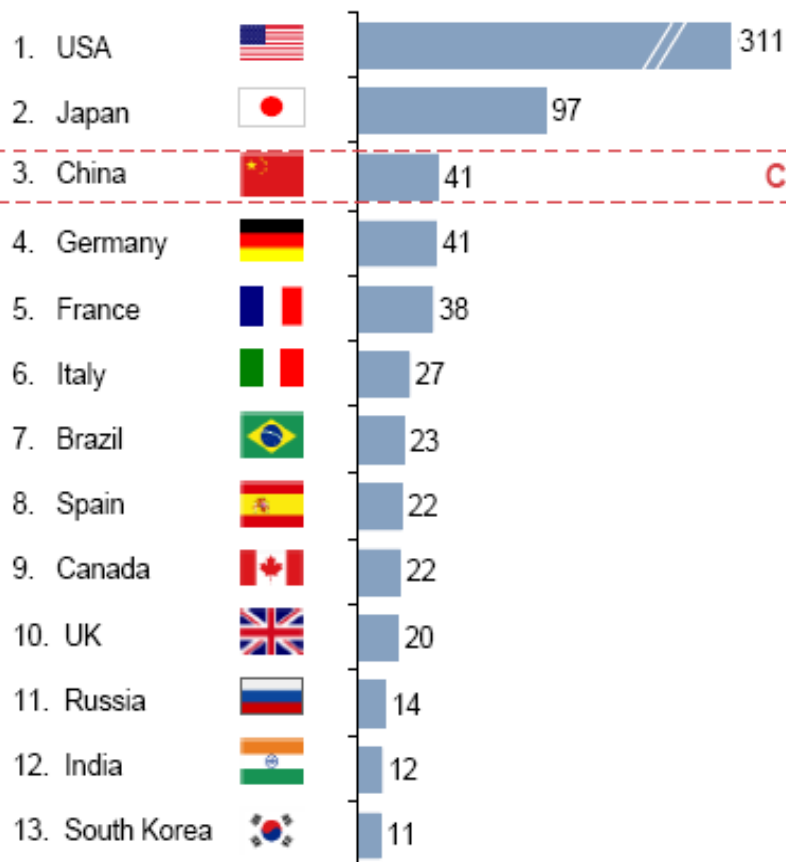
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Key challenges and learning

China growth as one of the largest pharma globally



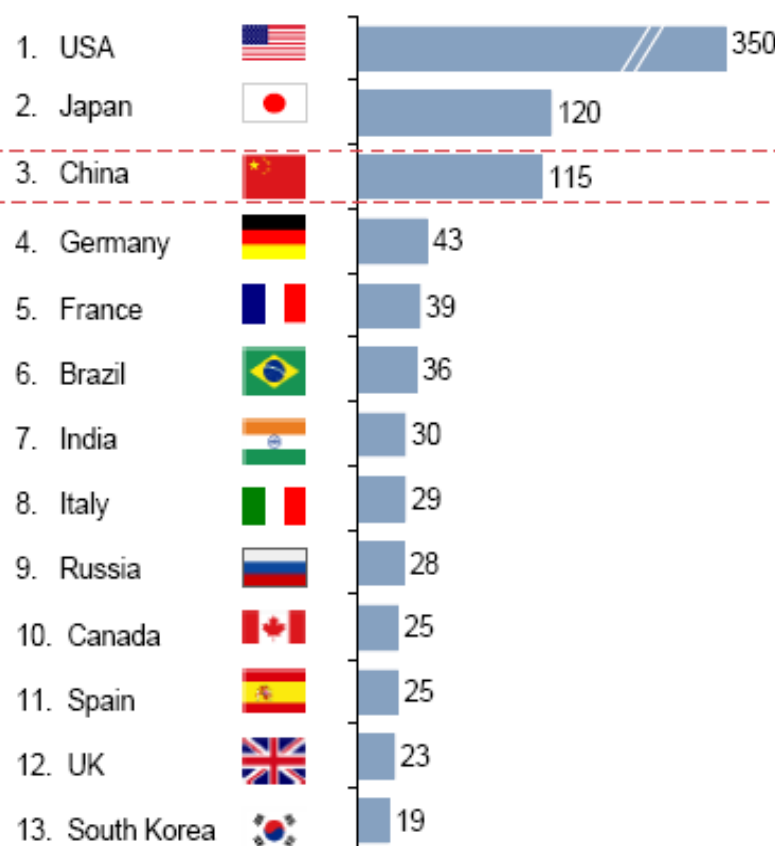
Top 13 pharmaceuticals market 2010 (USDbn)



Total: USD857bn

CAGR:5%

Top 13 pharmaceuticals markets 2015F (USDbn)



Total: USD1,095bn

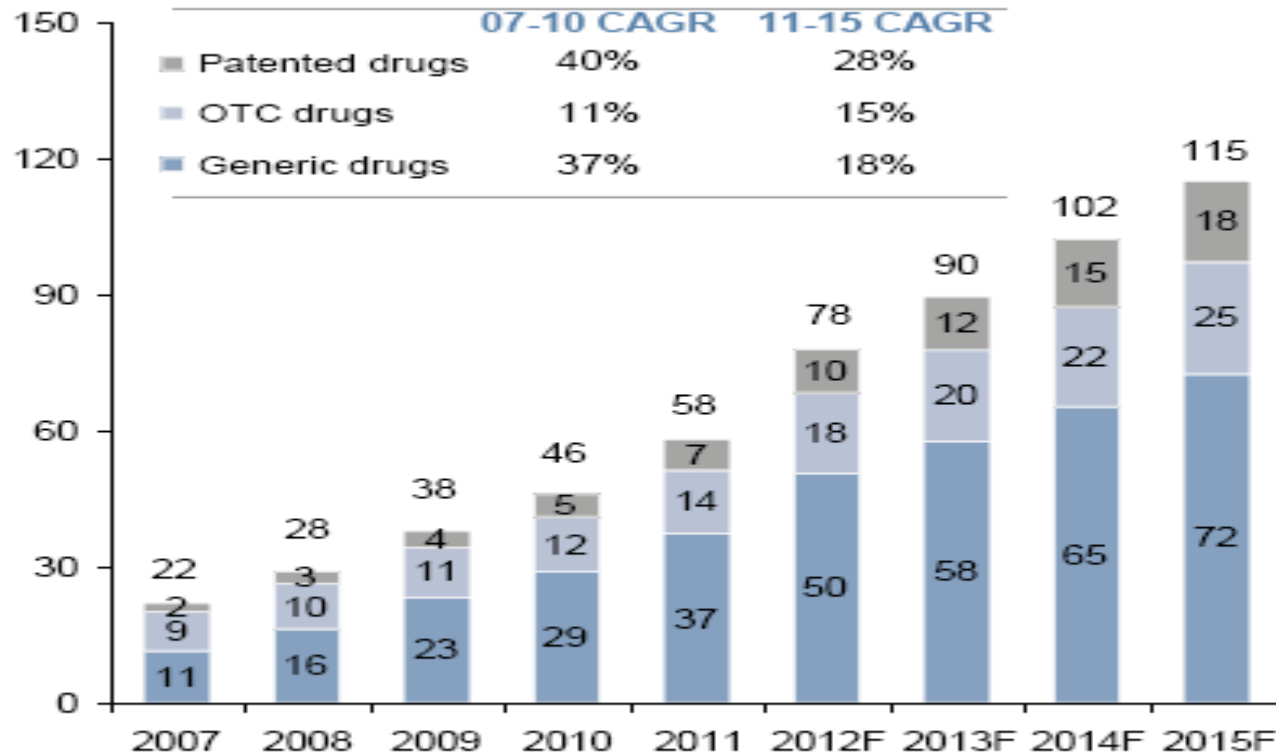
Source: IMS

China Pharmaceutical market size(USDm)

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China pharmaceutical market size (USDm)



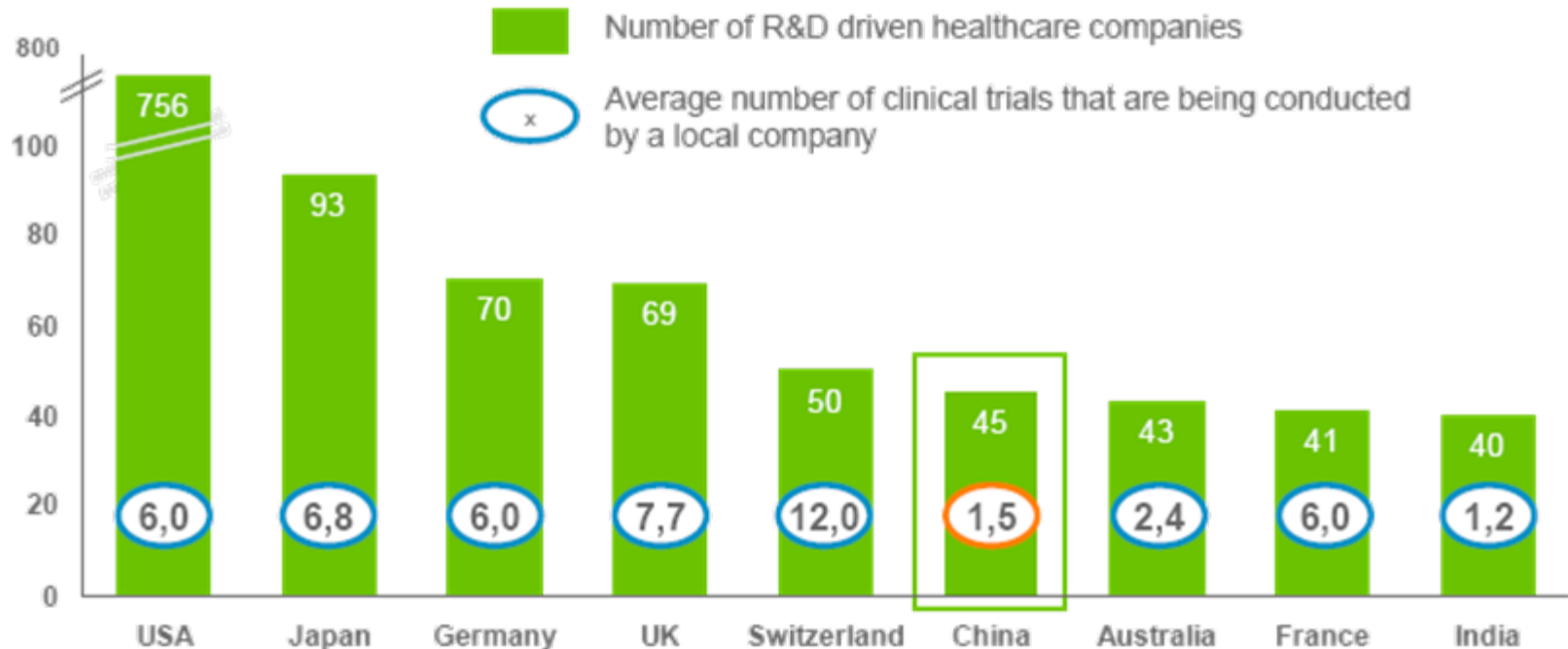
Source: BMI, IMS, broker research

R&D driven companies dominated clinical trials

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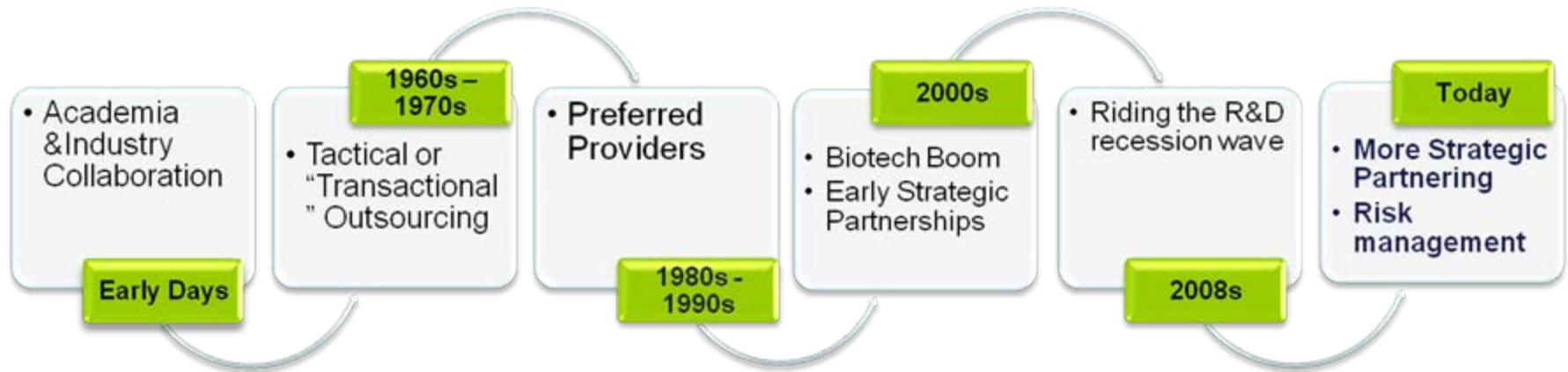


Healthcare companies with pipeline compounds by country of headquarter



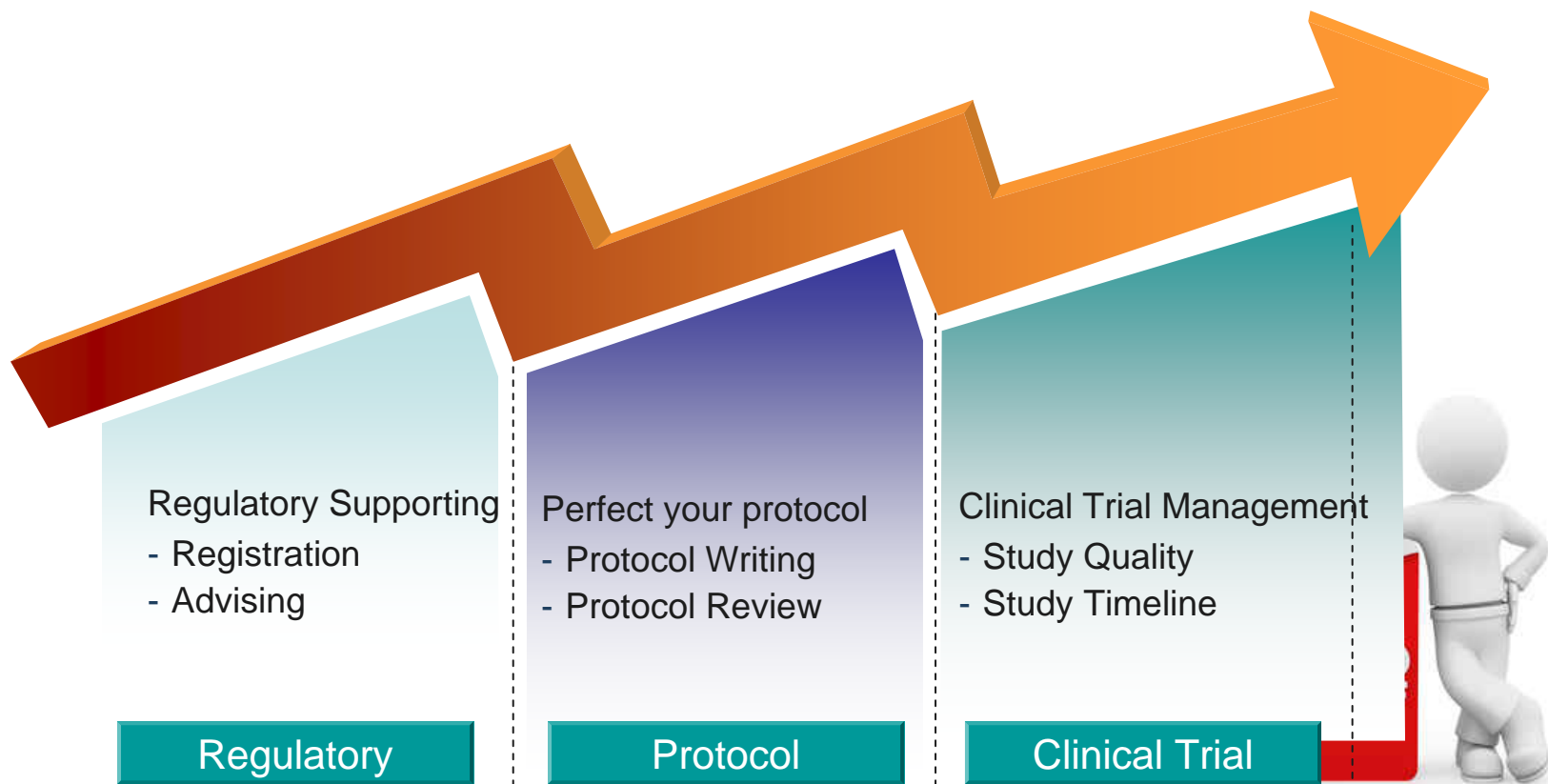
Source: MedTrack Pipeline Database, August 2011

The Trend of Partnering Models of Outsourcing



Service provided for clients in the Development of New Drug

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China's Innovation favorite for New Models

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China has a solid foundation for long term growth and is well equipped to become a leading presence in innovation

Increased funding

Government Substantial investment
Small but increasing VC funding

Improving infrastructure

Over 100 life science parks and incubators around China

Expanding Talent Pool

Sharp increase of returnees in recent years (CAGR=29%)
Large population of medical, life sciences and physical sciences students trained from domestic academic institutions (5 Mill graduates in China)

Strengthened IP regulation

Further strengthening of IP protection underway,
Industry players are placing IP protection as one of the top priorities

Big Pharma Unmet Needs

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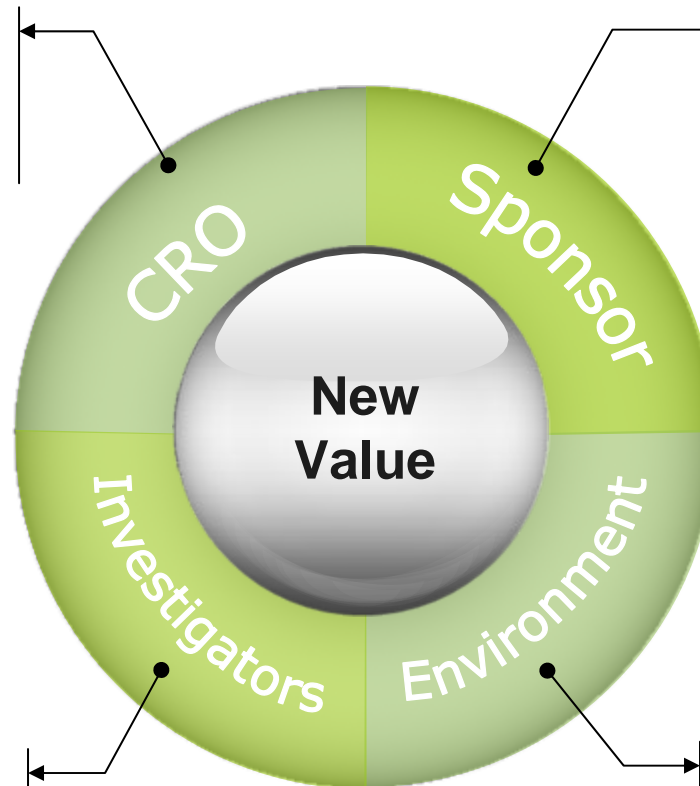
- ✓ Clinical stage products
- ✓ Preclinical candidates
- ✓ Platforms
- ✓ Unique expertise
- ✓ Therapeutic area alignment
- ✓ Biomarkers
- ✓ Compelling biology
- ✓ IP / Novelty
- ✓ Risk mitigation
- ✓ Access to emerging markets

How to Create New Value



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- Rich experience
- Strong team
- Acquaint with Sponsor's needs



- Specific need and strategy
- Budget
- Product pipeline

- Capability
- Infrastructure
- Communication
- Knowledge & patient pool

- Regulatory
- Government policies
- Founding

Successful case--Tigermmed



- **Board Geographic Coverage:** Up to Mar. 2012, Tigermmed operates 7 subsidiaries, 40 offices in China mainland and China Hongkong .
- **Strong Capability:** Specialized in providing Phase I-IV clinical trials, data management, biostatistics and regulatory services to healthcare products
- **Dedicated Team:** 620 employees in total

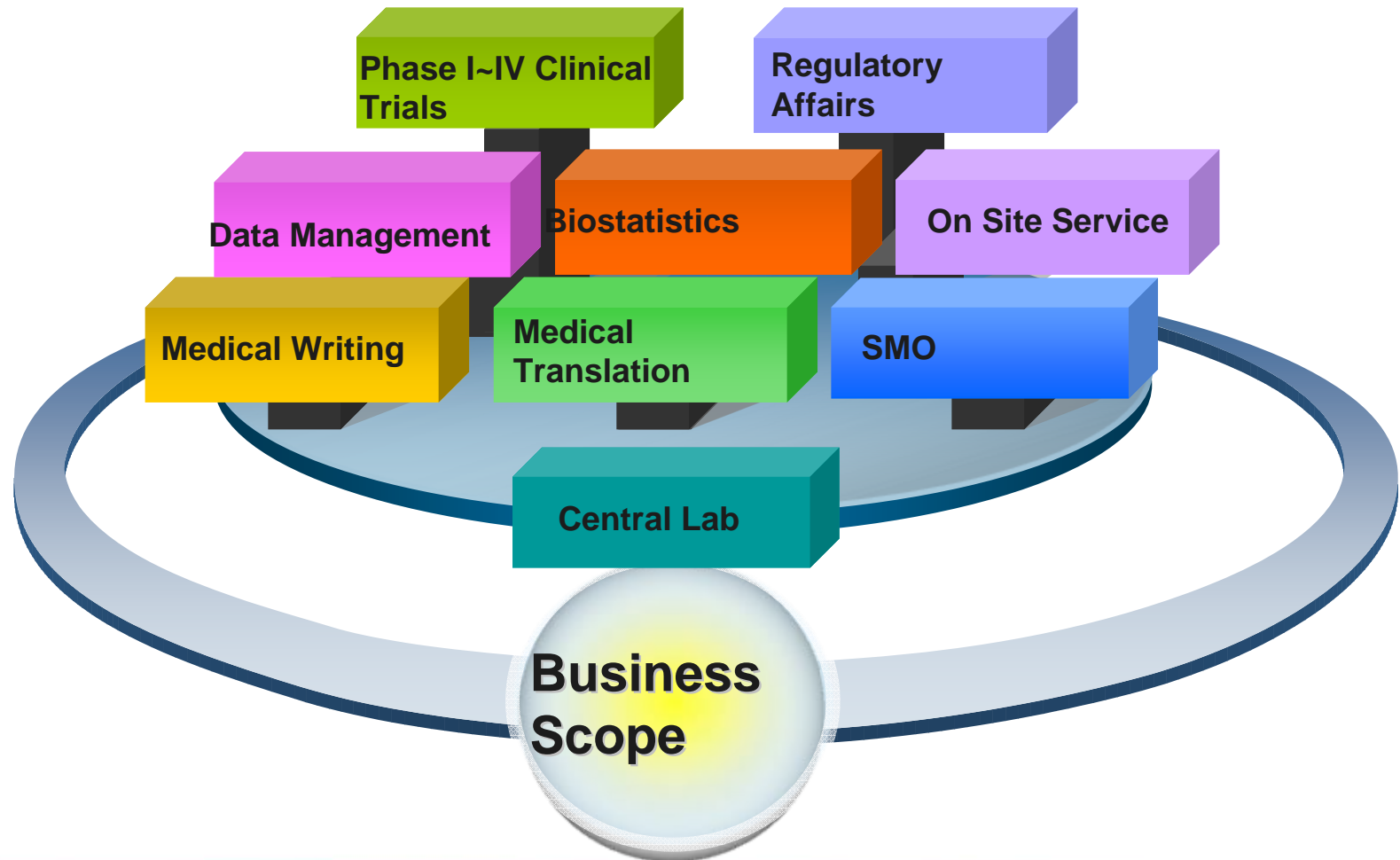
What are the value of CRO

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Solution packages instead of sole service

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Synergy the resource as partnership

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Sponsor

Scope of work

Timeline

Resource

Finance

SOP

CRO

Task list/Task forth

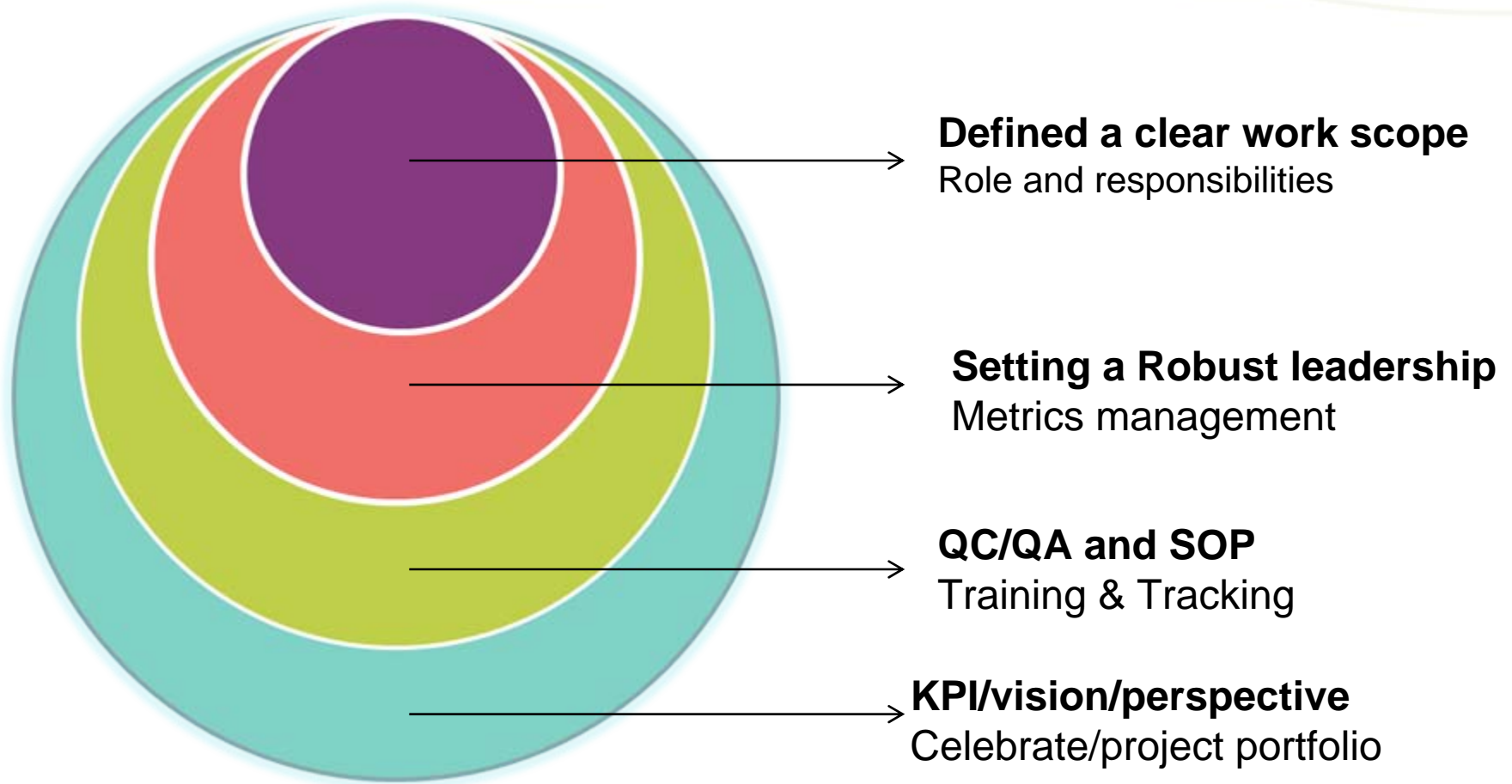
Agreement/contract

Time/quality

Management metrics of
RoI

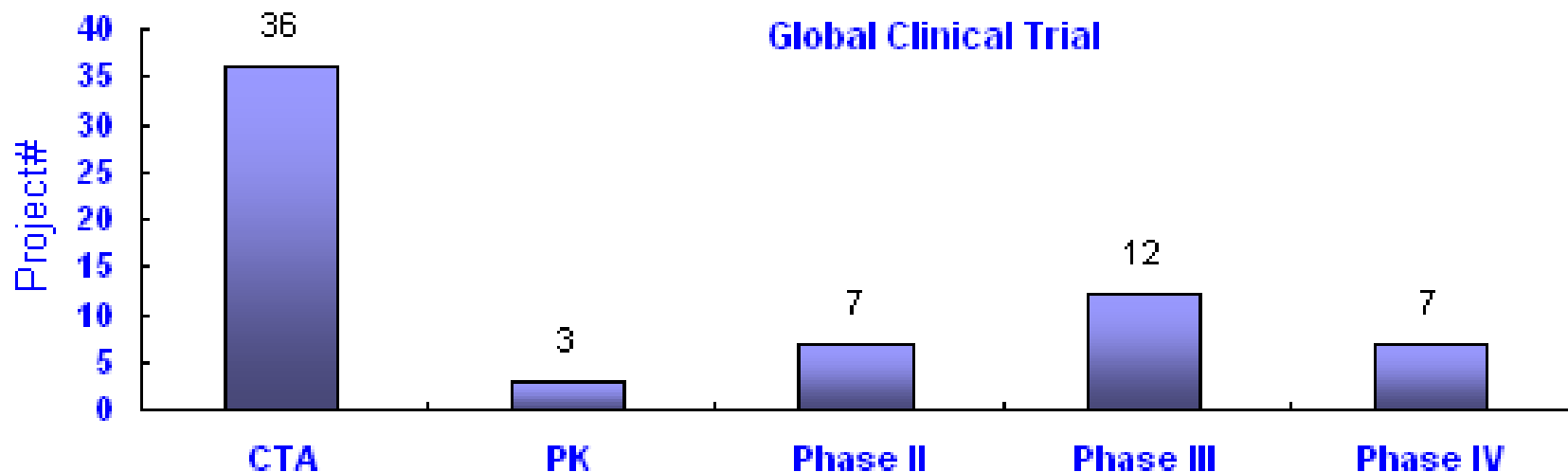
KSF for strategic partnerships

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Experience in Global Trials

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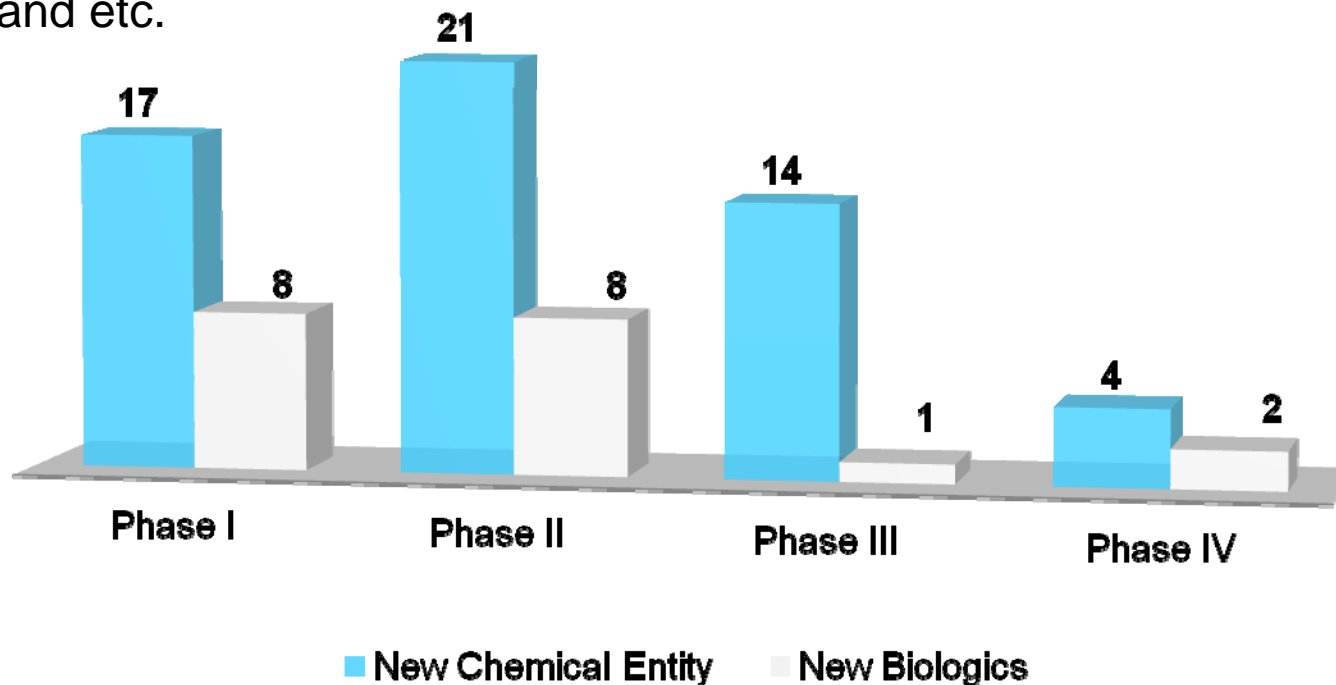


More than 65 MCT with 30 more clients in the several key therapeutic areas

Rich Experience in Innovative Drugs

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- Through our unmatched experience and outstanding achievements in the development of **36 innovative drugs (26 NCEs and 10 new biological products)**, 75 studies, Tigermed is recognized as “An Innovative CRO” in China.
- Therapeutic areas include: HBV, oncology, endocrine, cardiovascular, AIDS and etc.



Key Challenges CROs Faced



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- Higher professional standard and demanding request from clients
- Deliver effective but well RoI results for MCT
- Leadership in the industry and good rapport with sites/PI/investigators/authorities
- A stable but workable task forth
- Edging cutting knowledge
- Dynamic / fluid Environment
- Conflicts solving
- Ethical concerns



Key leanings of cooperation



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- Self-awareness of both parties
- Aligned strategic objectives
- Manage expectations around company culture differences
- Develop key relationships
- Close project management
 - Sensitivity to timelines, budget, reporting and deliverables
- Effective communication
 - Language, time zones, regional culture
 - Metrics risk management

Thanks! |  Tigermed

