



ORACLE®

Healthcare and Life Sciences

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France Healthcare Sector Director

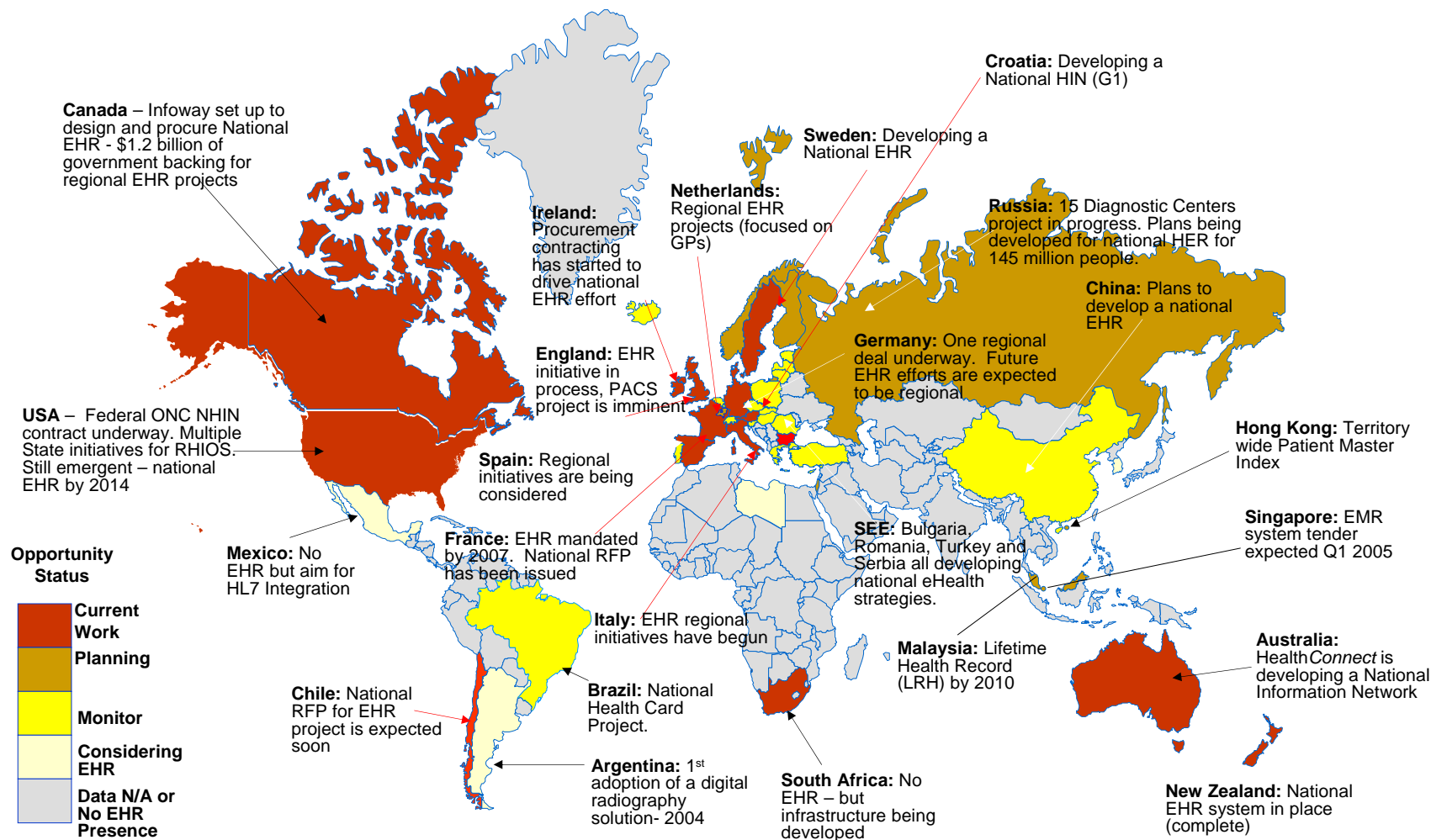
Global Business Development Director

Connected Health

Agenda

- National and regional EHRs
same old story
- Assistance Publique – Hôpitaux de Paris
a technology choice
- What IT industry could provide?

Globalisation...

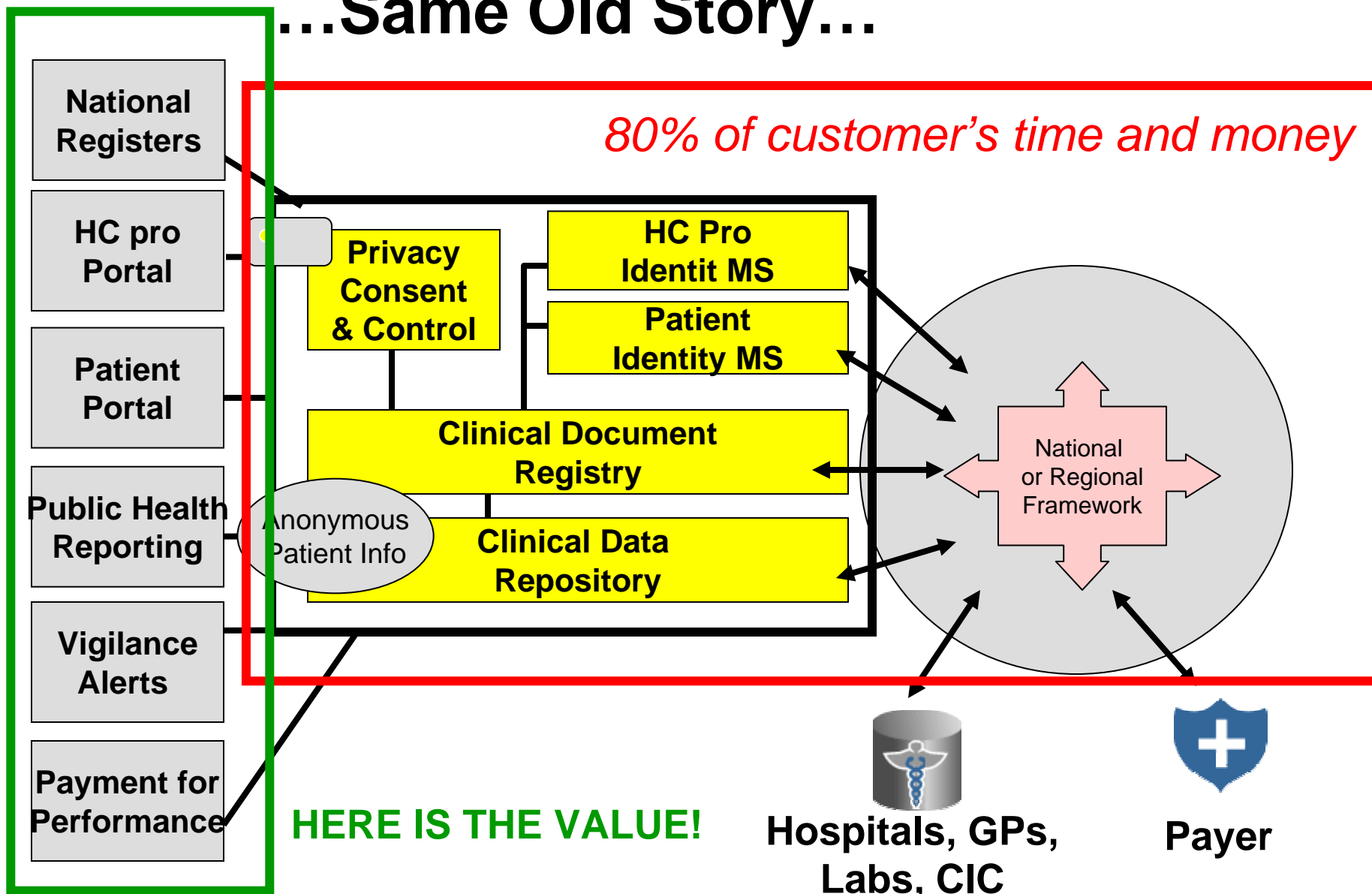


* Target opportunities identified by text in red

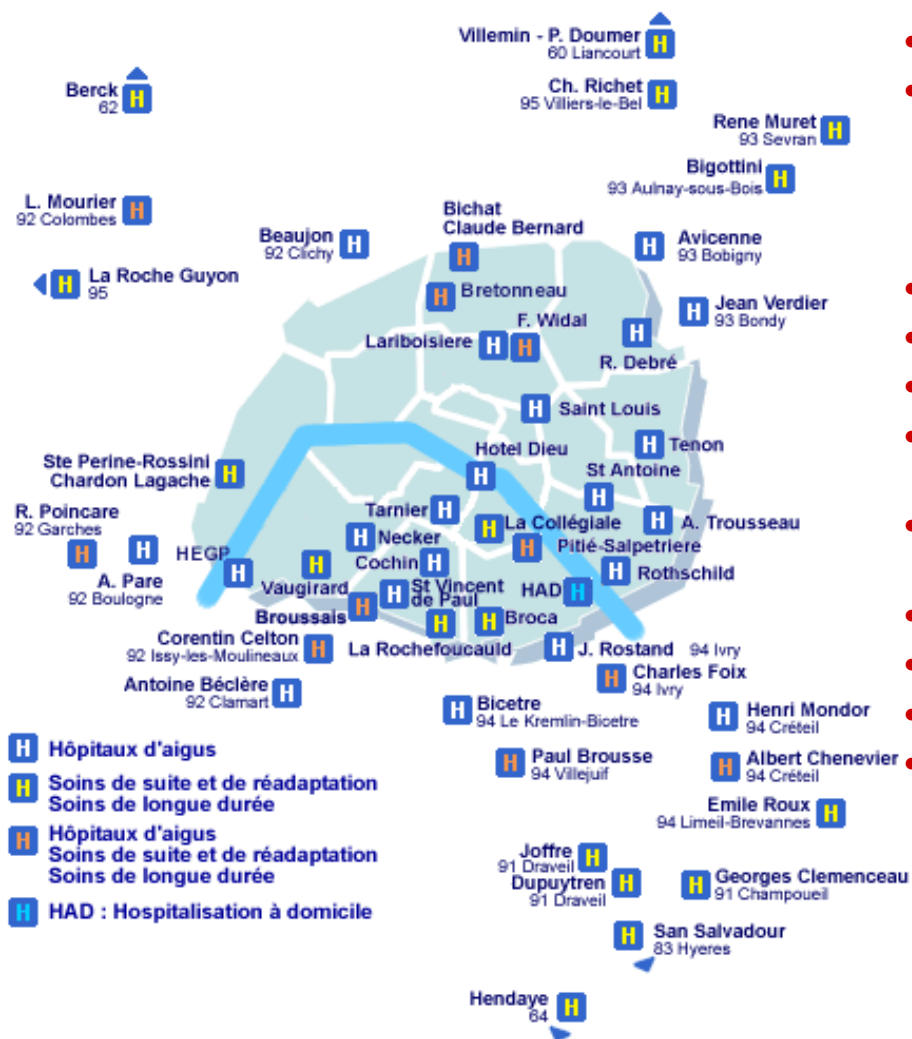
Source: Accenture + Oracle

...Same Old Story...

80% of customer's time and money



Assistance Publique – Hôpitaux de Paris



- First academic hospital group in the world
- One unique legal entity
- 39 Hospitals including 28 acute
 - 17 in Paris
 - 18 near Paris
 - 4 other places in France
- 23 000 beds + 1 400 ambulatory places
- 5,4 Million outpatients
- 1 Million inpatients
- 90 000 people including 20 000 physicians, 52 000 nurses, 16 000 administrative
- 600 ward units and 200 labs and radiology services
- 37 education centers (including nurse schools)
- 4 Emergency Medical Units (SAMU)
- Home care (1 000 places)
- 5 Billion Euros annual budget

*5 years IT Plan
250 million euros investment*

Technology choices in less than 6 months

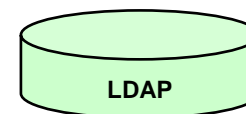


Consulting
Services

HERE IS THE VALUE!

Applications

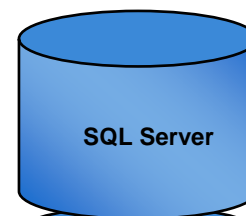
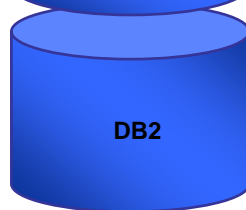
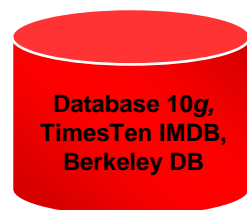
Development
Tools



Middleware
Suite



Database

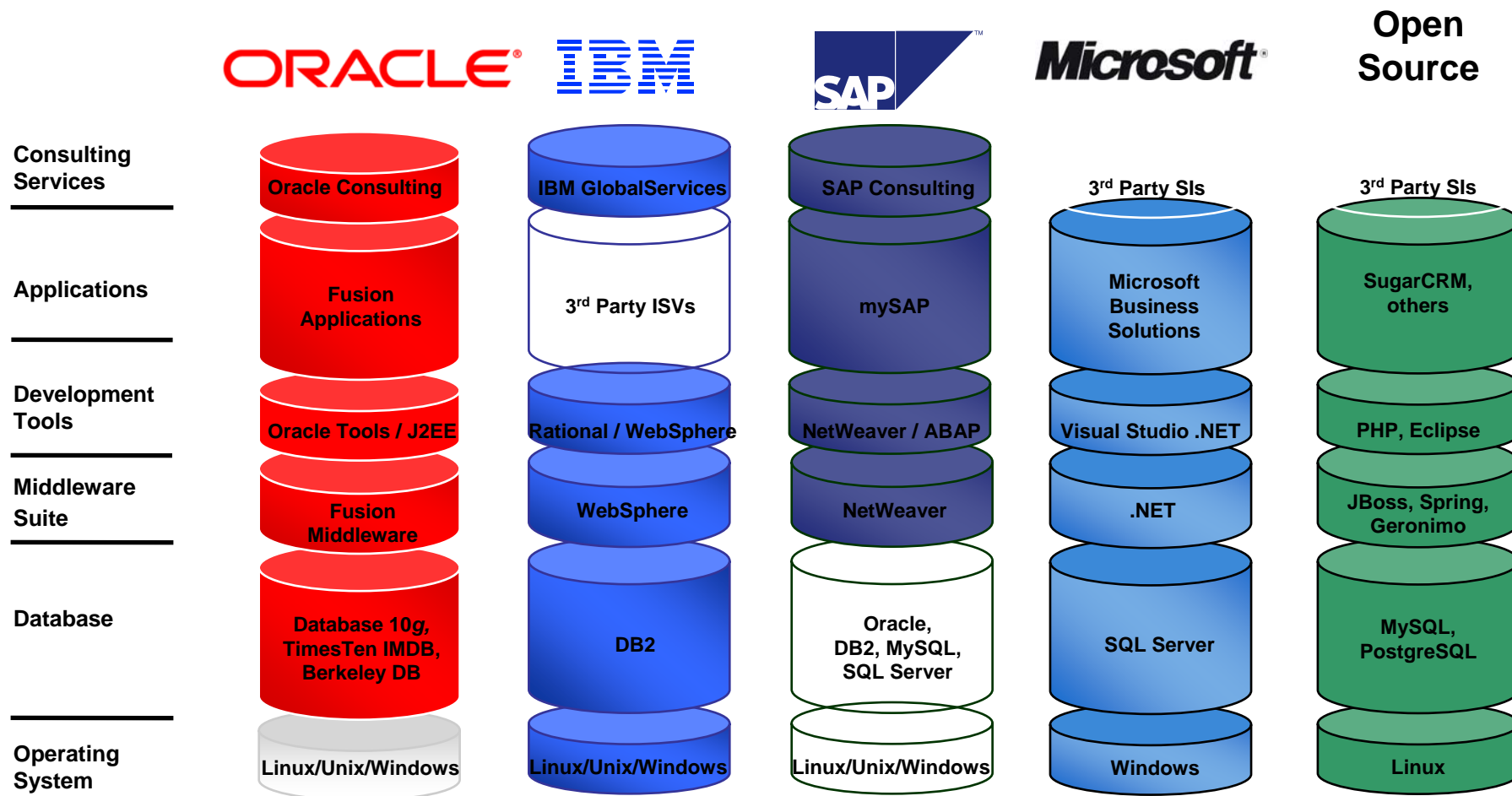


Operating
System



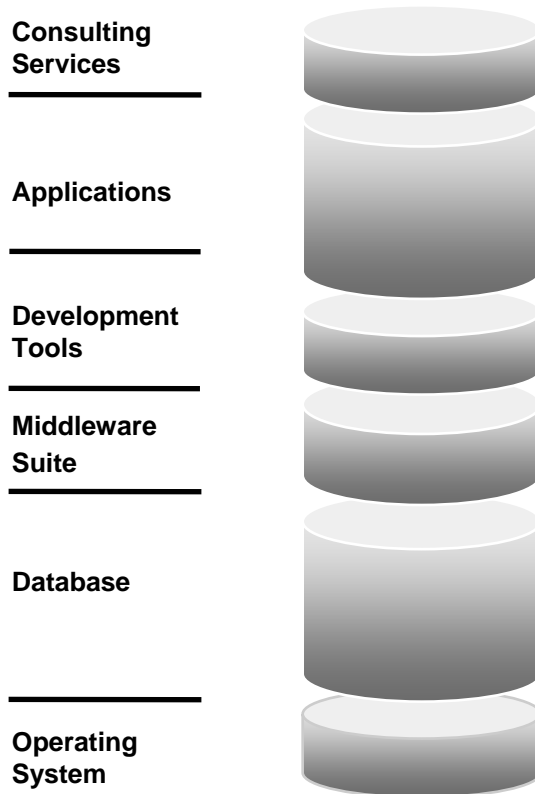
80% of customer's time and money

...ignoring IT Market Trends



Functional and Technological Consistency

a way to do more with less...



- Global consistency (Apps+Tech)
- Lower acquisition costs
- Increase project success
- Increase wall-to-wall security and disponibility
- Decrease of integration costs
- Decrease of operational costs
- Decrease of deployment delay
- Felxibility for the future
- Decrease of training costs

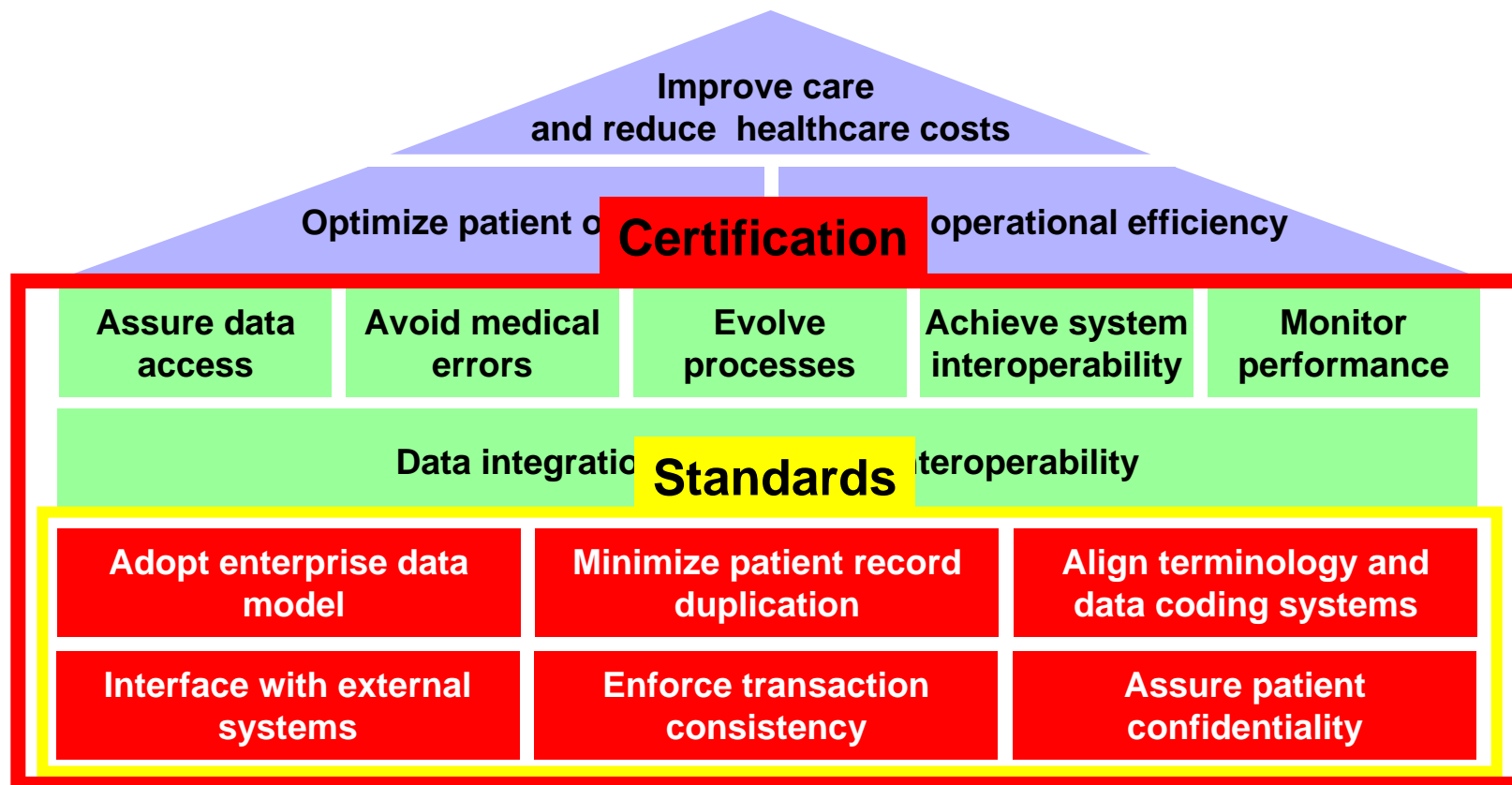
Competences and skills

- France, a 60 million citizens country
- 140 billion euros Healthcare expenses
- 800 000 people working in Healthcare

- 1.4 billion euros HC IT expenses (Bank is 12 bn - *IDC*)
- 6 000 people working in Health Care IT (Bank 10x)
 - 80% on integrating and running technology
 - Less than 20% on Apps development or implementation

- Smaller budget than other industries and concentrating on non-core business!

Healthcare Needs...



IT Industry Expectations

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