

Innovate2011

The Rational Software Conference

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Let's **build** a smarter planet.



Competitive intelligence: A strategic business driver

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Agenda

- **Background to company/trading environment**
- **Competitive Intelligence (CI) – A strategic business driver**
- **Our requirements & finding a software solution**
- **Overview of RFP CI workspace**



Company background

- Packaging for temperature sensitive pharma/biologicals
- Early market entrant (trading for 35 years)
- Operations in Europe, Asia & North America



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Trading environment

- Selling to highly regulated \$800bn pharma/healthcare sector
- Highly acquisitive sector & fragmented by specialism
- Regulatory pressure on drug producers (dev/manu/dist)
- High level of customer mobility (switching suppliers)
- 50+ regional competitors (packaging suppliers)
- Homogenous packaging product offerings

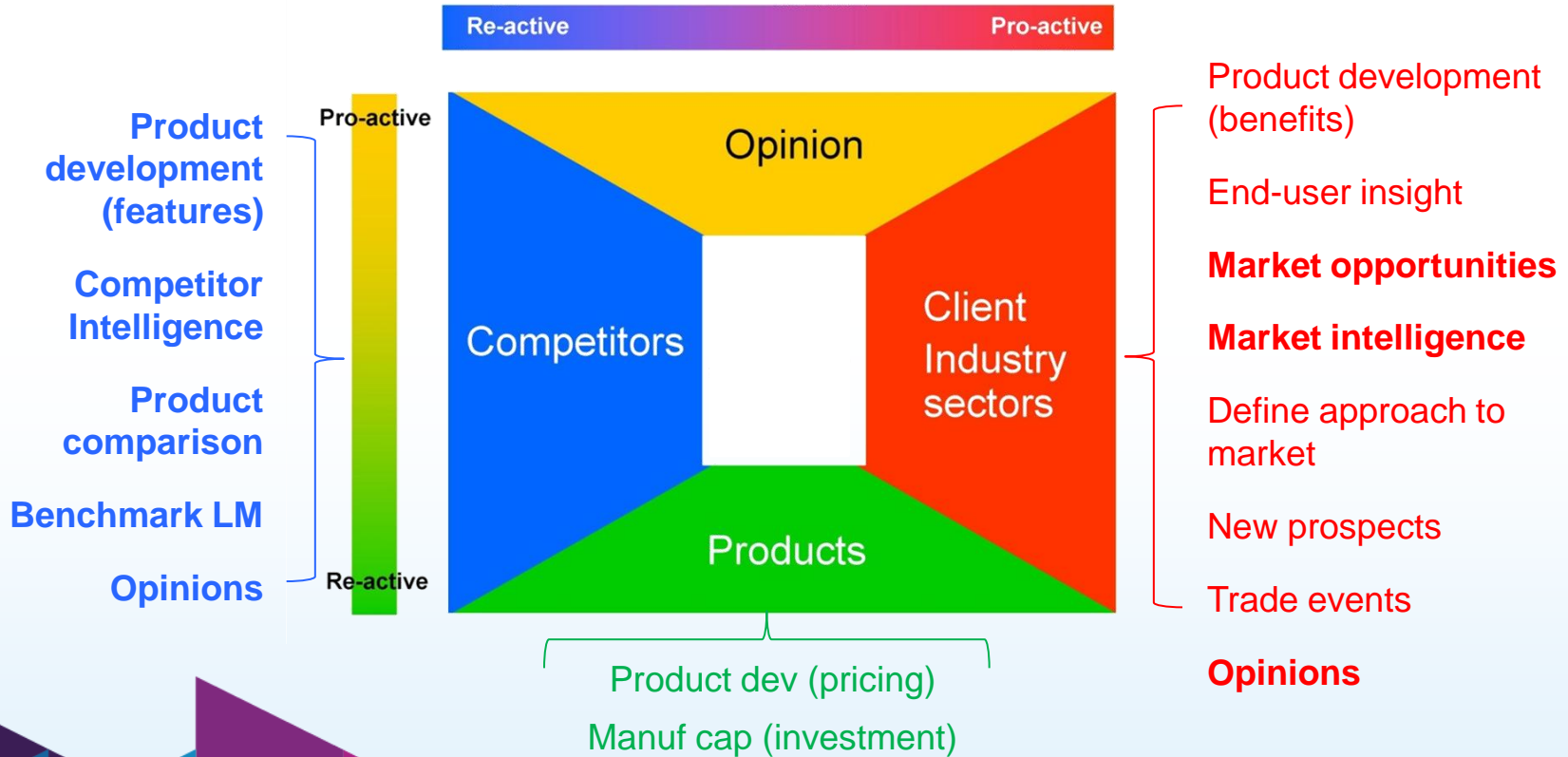


Trading environment (2)

- Growth of complex drugs being launched (temp sensitive)
- Approved supplier relationships (pre-qual, evidence based)
- Rising R&D costs to bring unique drugs to market
- Restricted market access (delivery costs/JIT local supply/QA&QC)
- Geographic expansion (drug R&D/patients)
- International healthcare reforms



Why do we need CI?



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CI – A strategic business driver

- **Closer to client markets & competitors to improve trading position**
- **Evidence to support NPD/marketing activities**
- **Instigate a more pro-active approach by considering opinions, trends, topics, issues**
- **View the whole market not individual competitors/prospects**



Why do we need a CI database?

- Repository to collate information
- Target info at key personnel
- Reveal pipeline opportunities/challenges (for our organisation/industry/marketplace)
- Collect & share industry/field knowledge
- 'Fast track' resource for new staff
- Perform multi directional analysis
- Understand our position in the marketplace



Why do we need CI database? (2)

- Establish/quantify competitive threat
- Benchmark against our peers
- Quantify trends/fads in the customer marketplace
- Transpose customer industry trends/against product features /benefits
- Pose questions impacting future strategy/direction
- Keep tabs on a complex trading environment (fast moving/technically diverse)



Identifying a software solution

- **Functional brief**
- **Review DIY & proprietary solutions**
 - **Degree of self-customisation**
 - **Value for money**
 - **System requirements**
 - **General 'ease of use'**



Identifying a software solution - brief



>Client industry
Segmentation
News
Industry issues/topics
Industry associations/bodies

Search

Compare

>Product
Categorisation
Product ranges
Specifications
Literature
Opinion of 3rd party

>Competitor
Corporate profile
Operational review
News/press/events
Opinion of 3rd party

Analyse

Identifying a software solution - options



Evaluated 3 options:

- Commercial web hosted CI solutions
- Bespoke solution ASP.net /SQL
- Bespoke solution MSAccess

3. Summary of database development options & suppliers

3.1 Summary of in-house software development proposals (external software programmers)

UJ's outline functional specification (see appendix A) provides a clear guide for the data, structure, relationships and platform for suppliers to follow and estimate project cost. This is reflected in the way suppliers have briefly referred to the clients' specification and not defined any specifications of their own in their proposals. In all instances, the suppliers had made contact on at least one occasion to clarify aspects of the design and functionality.

Appendix A – Review of in-house development proposals (external software programmers)

B1. In-house software development proposals (external software programmers)

B1.1. Ryland

Outline proposal that includes general statements about database functionality based upon the client's specification and options areas for further development.

Proposal content	✓	✗	Partial development options
Project timeline	✓	✗	Partial development options
Project cost	✓	✗	Company's expertise experience
Technical planning	✓	✗	Technical platform defined
Client information for supplier	✓	✗	Client's role

B1.2. Seave

General outline proposal that breaks down the in-house resources and project phases. A generic overview is also included about the project being based upon the client's outline functional specification.

Proposal content	✓	✗	Partial development options
Project timeline	✓	✗	Company's expertise experience
Project cost	✓	✗	Technical platform defined
Technical planning	✓	✗	Client's role
Client information for supplier	✓	✗	Company's role

B1.3. VWA

Detailed breakdown of costs, project phases and description of the technical parameters. The proposal is based upon the clients' outline functional specification and includes a series of additional functionality as outline areas.

Proposal content	✓	✗	Partial development options
Project timeline	✓	✗	Company's expertise experience
Project cost	✓	✗	Technical platform defined
Technical planning	✓	✗	Client's role
Client information for supplier	✓	✗	Company's role

Table summarising functionality of 0 solutions (including comparison with in-house solution)

Client Requirements	01 Ryland	02 Seave	03 VWA	04 In-house solution
Project timeline	✓	✓	✓	✓
Project cost	✓	✓	✓	✓
Technical planning	✓	✓	✓	✓
Client information for supplier	✓	✓	✓	✓
Company's expertise experience	✗	✗	✗	✓
Technical platform defined	✗	✗	✗	✓
Client's role	✗	✗	✗	✓
Company's role	✗	✗	✗	✓
Additional functionality	✗	✗	✗	✓
Overall score	3	3	3	4

B2. Summary of software developer proposals

UJ's outline functional specification (see appendix A) provides a clear guide for the data, structure, relationships and platform for suppliers to follow and estimate project cost. This is reflected in the way suppliers have briefly referred to the clients' specification and not defined any specifications of their own in their proposals. In all instances, the suppliers had made contact on at least one occasion to clarify aspects of the design and functionality.

B2.1. Ryland

Supplier	Dev Price	Annual Fees	Scalable	Additional features (eg. reports, etc. in excel)	Company's expertise experience	Options as outline areas
Ryland	£2000 (flat fee)	£100	Yes	Optional additional using excel. Based upon 7 system access design. Training on 2008.	✓	Yes based upon 2008. Training on 2008. 2008. 2008.
Seave	£1000 (flat fee)	None	Yes	Yes users (10) not included in price. Client's role as per project.	✓	Yes based upon 2008. Training on 2008. 2008.
VWA	£4000 (flat fee)	None	Yes	Cost based on 100 user requests. Based upon 7 system access design.	✓	Yes based upon 2008. Training on 2008. 2008.

B2.2. Seave

Supplier	Dev Price	Annual Fees	Scalable	Additional features (eg. reports, etc. in excel)	Company's expertise experience	Options as outline areas
Seave	£1000 (flat fee)	None	Yes	Yes users (10) not included in price. Client's role as per project.	✓	Yes based upon 2008. Training on 2008. 2008.
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B2.3. VWA

Supplier	Dev Price	Annual Fees	Scalable	Additional features (eg. reports, etc. in excel)	Company's expertise experience	Options as outline areas
VWA	£4000 (flat fee)	None	Yes	Cost based on 100 user requests. Based upon 7 system access design.	✓	Yes based upon 2008. Training on 2008. 2008.

Information held in RFP

Customer industry sectors

- News
- Current topics
- Trade bodies

Competitors

- Company profiling
- Product catalogue
- Ranking
- News
- Assessment/comparison
- Product (mkt. landscape)



News & industry issues



Competitive Intelligence



Key industry sector issues

Reset sorting.

Title	Issue Date	Industry Sector
Oil price retreats from highest point in 3 years	13/09/11	Other
European road tolls set to increase in 2012	09/09/11	Transport/logistics
EU plans changes to tachograph legislation	09/09/11	Novartis executive to join Gates foundation
Governments cut pharma prices to save money	09/09/11	Novartis executive to join Gates foundation
Drug developers facing complex global regulatory requirements	05/09/11	Drug delivery device sales will hit \$197B in 2014
Rising threats to security in the pharma industry	31/08/11	Diabetes - Pharma's fastest growing market
Airlines offset passenger losses with growth in cargo volumes	24/08/11	Diabetes - Pharma's fastest growing market
Global fake drugs hit \$200 billion according to the FDA	10/08/11	Vaxxas gets \$15m to develop needle/cold chain free vaccines
The Outlook for Pharmaceuticals in Brazil, Russia, India & China	05/08/11	Vaxxas gets \$15m to develop needle/cold chain free vaccines
Rising cost of commercial waste disposal	03/08/11	
Rise of biotechnology based drugs	29/07/11	
Thermostable vaccine development	26/07/11	
NHS Reform bill	22/07/11	
NPSA urges hospitals to follow guidance on vaccine storage	19/07/11	

Competitor news

Reset sorting.

Title	News Date	Competitor	Link to article	Local file link
US certifies Envirocooler RKN e1	14/09/11	Envirotainer	http://www.impactpub.com.au/aircargo/index.php?option=com_content&task=view&id=8411&Itemid=60	
SCA Cool Logistics Wins Gold Starpack Award	02/09/11	SCA Cool Logistics	http://www.packagingeurope.com/Packaging-Europe-News/42967/SCA-Cool-Logistics-Wins-Gold-Starpack-Award.html	
Active CC Boxes rebrands as Intelligent Thermal Solutions	05/08/11	Other competitors	http://www.digitaljournal.com/pr/378851#ixzz1Tru08TNX	
Whitepaper on ambient temperature profile development	05/08/11	Thermosafe		Thermosafe Whitepaper.pdf (896 KB)
Richard Peck appointed as Global Head - Strategic Projects & Quality	05/08/11	Softbox Systems Ltd		
Softbox patent for advanced type of air transport compatible shipper design	05/08/11	Softbox Systems Ltd		Softbox Systems Patent GB2470662.pdf (906 KB)
va-Q-tec start work on new factory in Germany	03/08/11	Va-Q-tec		vaQtec.pdf (98 KB)
Packaging manufacturer plans to expand, adding 80 jobs	02/08/11	Intelsius DGP	http://www.ibj.com/packaging-manufacturer-plans-to-expand-add-80-jobs/PARAMS/article/28644	DGP 020811.pdf (211 KB)

Customer industry news

Title	News Date	Industry Sector	Link to Article
Global generic drug revenues to reach \$137.6 billion in 2015, says Visiongain	15/09/11	Pharmaceutical	http://www.thepharmaletter.com/file/107317/to-reach-1376-billion-in-2015-says-visiongain
Novartis executive to join Gates foundation	14/09/11	Pharmaceutical	
Drug delivery device sales will hit	13/09/11	Pharmaceutical	http://www.pharmatimes.com/Article/11-09-12

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Trade bodies

The screenshot displays a software interface with a sidebar on the left containing a tree view of 'Modules' and 'Add' options. The main area is titled 'Laboratory' and shows a table with the following data:

ID	002
Title	Laboratory
Description	<p>(Pathology) Laboratories that study and diagnose disease, can be split into anatomical, clinical or veterinary pathology. (Microbiology) Laboratories that study microorganisms, like fungi, viruses and the immune system. (Bio chemistry) Laboratories that study of chemical processes in living organisms, information flow, signalling, energy, A study of bio molecules.</p> <p>(Haematology) Laboratories that study blood disorders, diagnosis and prevention. (Academic institute) Laboratories that are linked to a educational establishment. (Public health) Laboratories that are involved in protecting public health by providing support and advice to Government, local districts, healthcare sector and emergency services</p>
Organisations	<p>(HPA) Health Protection Agency (ESCV) European Society for Clinical Virology (FEMS) Federation of European Microbiological Societies (IDSA) Infectious Disease Society of America (ESCMID) European Society of Clinical Microbiology and Infectious Diseases (ISID) International Society for Infectious Diseases (IPS) Infection Prevention Society (IFIC) International Federation for Infection Control (ABSA) American Biological Safety Association (BIS) British Infection Society (BMA) British Medical Association (BMS) British Mycological Society (BSI) British Society for Immunology (CCRA) Clinical Contract Research Association (CDC) Centres for Disease Control and Prevention (CLSI) Clinical and Lab Standards Institute (EBSA) European Bio Safety Association (ECDC) The European Centre for Disease Prevention and Control (IEA) International Epidemiological Association (RCP) The Royal College of Pathologists (SGM) Society for General Microbiology (UKCRN) UK Clinical Research Network (UKCVN) UK Clinical Virology Network</p>

Overlaid on the right is a window titled '(BMA) British Medical Association - Mozilla Firefox'. It shows a form with the following details:

ID	007
Title	(BMA) British Medical Association
Description	The doctors' professional organisation established to look after the professional and personal needs of it's members and represents doctors in all branches of medicine all over the UK. They are the voice for doctors and medical students - in constant contact with ministers, government departments, members of the UK, Scottish, Welsh and Northern Ireland administrations and many other influential bodies. We are committed to keeping members in touch with the profession's collective views and policies and to being at the forefront of healthcare development.
Area of interest	News, issues, perspective on the pharma market
Comments	-
Industry sectors	<ul style="list-style-type: none">LaboratoryClinical trialsHospitalsPharmaceutical
Website	http://www.bma.org.uk

At the bottom of the window are 'Delete' and 'Close' buttons, and the text 'Done' is visible below the window.



Competitor profiling



- Competitors (2/15)
- Our Company
- Laminar Medica
- Cold Ice Inc.
- Global Cold Chain Solut.
- SCA Cool Logistics
- Intelsius DGP
- Va-O-tec
- Topa Verpakking
- Thermosafe
- Sofrigam
- Cold Chain Technology
- Emballiso
- Exam Packaging
- Softbox Systems Ltd
- Envirotainer**
- Other competitors

Envirotainer

Company Name Envirotainer

Company profile Offers flexible rental of advanced transport solutions for worldwide air cargo shipments of temperature-sensitive products. Founded in Sweden in 1995, it offers extensive cold chain management services,...

Address

Lagga Marma	Knivsta	Sweden
Irving	Texas	USA
Rockdale	Frankfurt	Germany
	New South Wales	Australia

Website <http://www.envirotainer.com>

News

Competitor news

- Accreditation of Envirotainer provider in Switzerland & France
- Emirates Air Cargo first airline to use new Envirotainer
- US certifies Envirocooler RKN e1

Competitor news table

Competitor news	News Date
Accreditation of Envirotainer provider in Switzerland & France	21/07/11
Emirates Air Cargo first airline to use new Envirotainer	28/07/11
US certifies Envirocooler RKN e1	14/09/11

Latest news http://www.google.co.uk/#client=psy&hl=en&rlz=1R2GGHP_en-GBGB426&tbm=nws&source=hp&q=Envirotainer&aq=f&aql=&aql=&oq=&pbx=1&bav=on.2,or_r_gc_r_pw.&fp=94ecf508344a317d8&iw=12628&bih=710

Customers Novartis Vaccines, Zuellig Pharma, Merck Serono, Janssen-Cilag, Roche

Company Personnel

Key personnel

- Berkley Stafford
- Bourjil Mourad Sr
- Gabriel Andersson
- Lars Johansson
- Niklas Lonkvist

Personnel Table

Personnel	Photograph	Position/region
Berkley Stafford		Global key account manager
Bourjil Mourad Sr		Head global partner management

Assets	Asset	Function/role	Location
	20 regional offices	Sales/customer service	Global
	Manufacturing facility	R & D, prod dev, supply	Sweden

Financial Performance	Sheets	Time Span	Time Interval
	Annual Performance	2007 - 2010	Year

Published accounts ENVIROTAINDER_Annual_Report_2008_ENG_web.pdf (695 KB)

Areas of added customer value RAPID Monitoring of shipment data

Product development Cold chain management team (shipment setup, load optimisation, qualification & training)

Product area	Description
RAP e2 container	Heating & cooling facility

Marketing activity

Activity	Description	Date
Exhibition	IQPC Rotterdam	Jan 2011
Exhibition	PDA Pharma CC man	March 2011

SWOT Analysis

Strengths Perceived as the pioneer and benchmark in the active solutions industry, believes that it has no significant competitors in the active solutions market, claims to have about 4,000 containers and...

Weaknesses Cannot offer tailored-made solutions in terms of payload, routing, offer an immediate solutions to fulfil unscheduled requirements. Containers that are leased (on a daily fee basis, including packing, transfers etc.) may not always be available for the shipment or may be expensive to obtain in less-populated areas.

Opportunities Implement clear product strategy to drive R & D activities on a global supply basis, targeting Envirotainers customers by offering a bespoke solution, enhanced service offerings incorporating respected third parties, opportunity to become the leading voice to counter pro-active system debates, publicity

Threats Customers increasingly using active solutions for their larger shipments, ability to heat and cool the product space, aggressive growth plans that target 10-15% p.a. to 2015

Market intelligence

Comment	Date	Source
Abbott has started using the E1 Envirotainer, and are extremely happy with the fact that they do not need any preparation for it. They are thinking of using it more and more compared with M14, we are counter attacking with the CTG1130, but operationally it is more challenging for them	May 09	BB
CSafe: Competitor to Envirotainer (US), launching Acutemp, their new active shipper. Main noted difference is that this works on a monthly rental basis, rather than a 1 off rental per journey. Again, raised interest from the market place	Oct 09	BB
Feedback from Abbott - Competition from Envirotainers is very strong, many affiliates prefer them to passive shippers as they do not have to dispose of the waste packaging. Mexico is a new destination where Envirotainers might be used.	Mar 10	BB
Cilag AG interested in CTG1130 due to increase cost of envirotainers and	Mar	CT



Competitor ranking

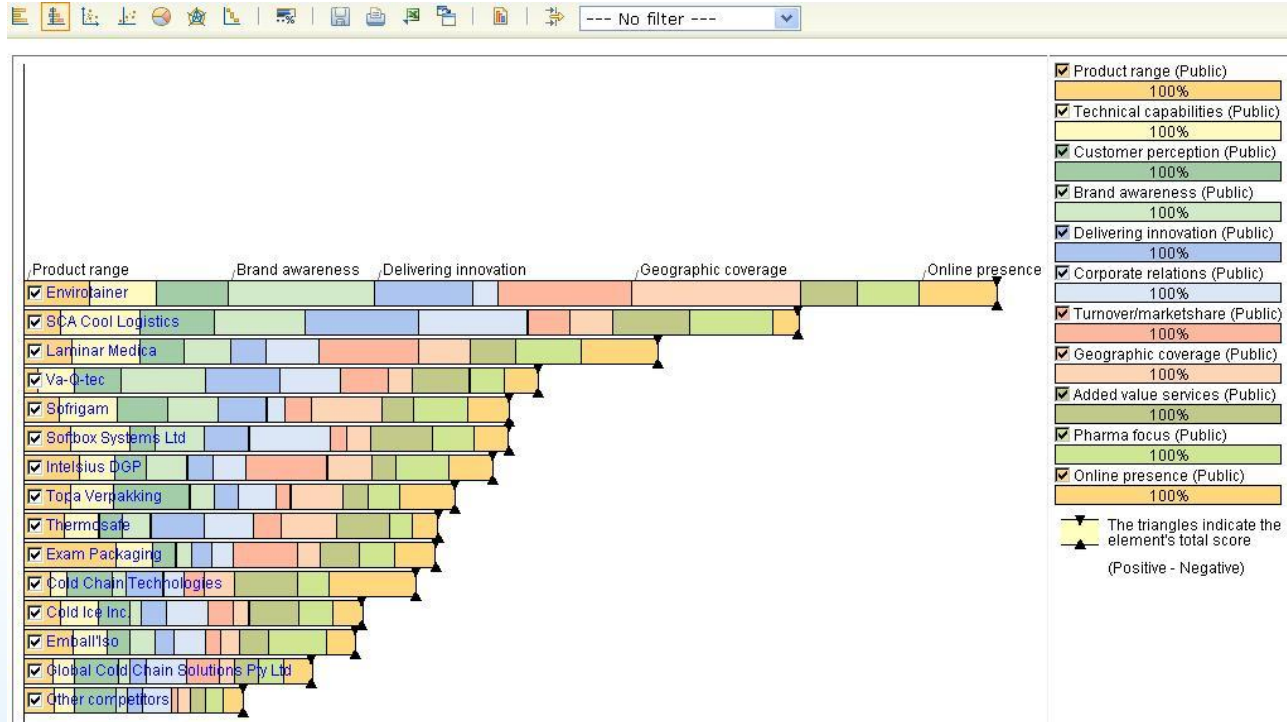


Who has the best technical capabilities

Global Cold Chain Solutions Pty Ltd	Emball'Iso
<p>Company Name Global Cold Chain Solutions Pty Ltd</p> <p>Company profile Provides cold chain shippers for food and Life Science applications, which are validated in a climatic chamber. They also provide wireless temperature monitoring systems to hospitals, art galleries...</p> <p>Address Tullamarine Victoria Australia</p> <p>Website http://www.globalcoldchain.com/</p> <p>News</p> <p>Company Personnel</p> <p>SWOT Analysis</p> <p>Strengths Much more than a packaging supplier, offering a range of consultancy services that do not relate directly to boxes. Strong presence in Australia</p> <p>Weaknesses Probably limited to serving Australasia region, rather than Europe/North America. Not certain what resources it has in terms of personnel</p> <p>Opportunities Implement clear product strategy to drive R & D activities on a global supply basis, targeting Envirotainers customers by offering a bespoke solution, enhanced service offerings incorporating respected third parties, opportunity to become the leading voice to counter pro-active system debates, publicity</p> <p>Threats</p> <p>Market intelligence</p>	<p>Company Name Emball'Iso</p> <p>Company profile Founded in 1990, it manufactures temperature controlled boxes from extruded polystyrene which are predominantly sold to the pharma market and catering industry. It has international manufacturing...</p> <p>Address HQ St. Georges de Reneins France M2 Products Ltd Leigh on Sea UK Isopor GmbH Neunkirchen Germany Barcelona Spain Philadelphia US Dubai UAE Singapore Shanghai China</p> <p>Website http://www.emballiso.com</p> <p>News</p> <p>Company Personnel</p> <p>SWOT Analysis</p> <p>Strengths Quick and easy to use systems are easy to assemble with built in spacers. Utilisation of slabs for greater ability to customise output, compared with mouldings. Extruded polystyrene gives better...</p> <p>Weaknesses Does not work exclusively with pharmaceutical</p>

Completed: 14 Required: 14 Recommended: 30 Number of elements: 15 Comparison: 15

Competitor ranking (2)



Product profiling




Products (84/809)

- Laminar Products
- Competitor Products
- Cold Ice
- Global Cold Chain S
- SCA Cool Logistics
- Intelsius DGP
- Va-Q-tec
 - va-Q-multipack
 - va-Q-Tcon3
 - va-Q-case
 - va-Q-bag
 - va-Q-tainer
 - va-Q-tainer E
 - va-Q-tainer L
 - va-Q-tainer X
 - va-Q-box
 - va-Q-pack
 - va-Q-sol
- Topa Verpakking
- Polartech
- Cold Chain Technol
- Exam Packaging
- Softbox Systems
- Envirotainer
- Thermosafe
- Softigam
- Emball'iso

va-Q-tainer Euro

ID	416
Product Name	va-Q-tainer Euro
Description	Universal passive transport container
Product Classification	Chilled
External dimensions	1423x1093x1580 (mm)
Product dimensions	1200x850x1220 (mm)
Product volume (Ltr)	1,224Ltrs
System Weight (Kg)	320Kg
Duration (hrs)	96Hrs
Unit price (€)	
Competitors	-
Competitor Products	-

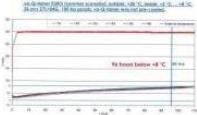
Image



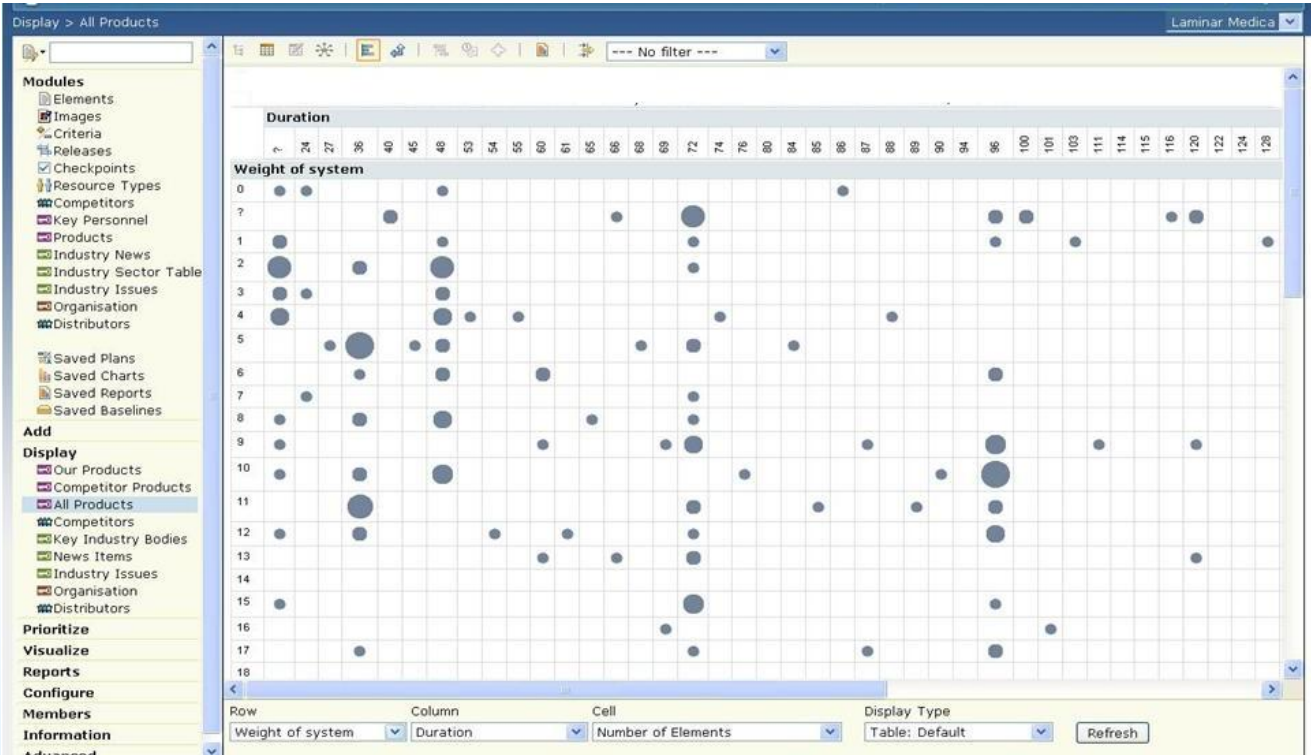
Document Link

Product literature [va-q-tainer_euro_pdb_en .pdf \(177 KB\)](#)

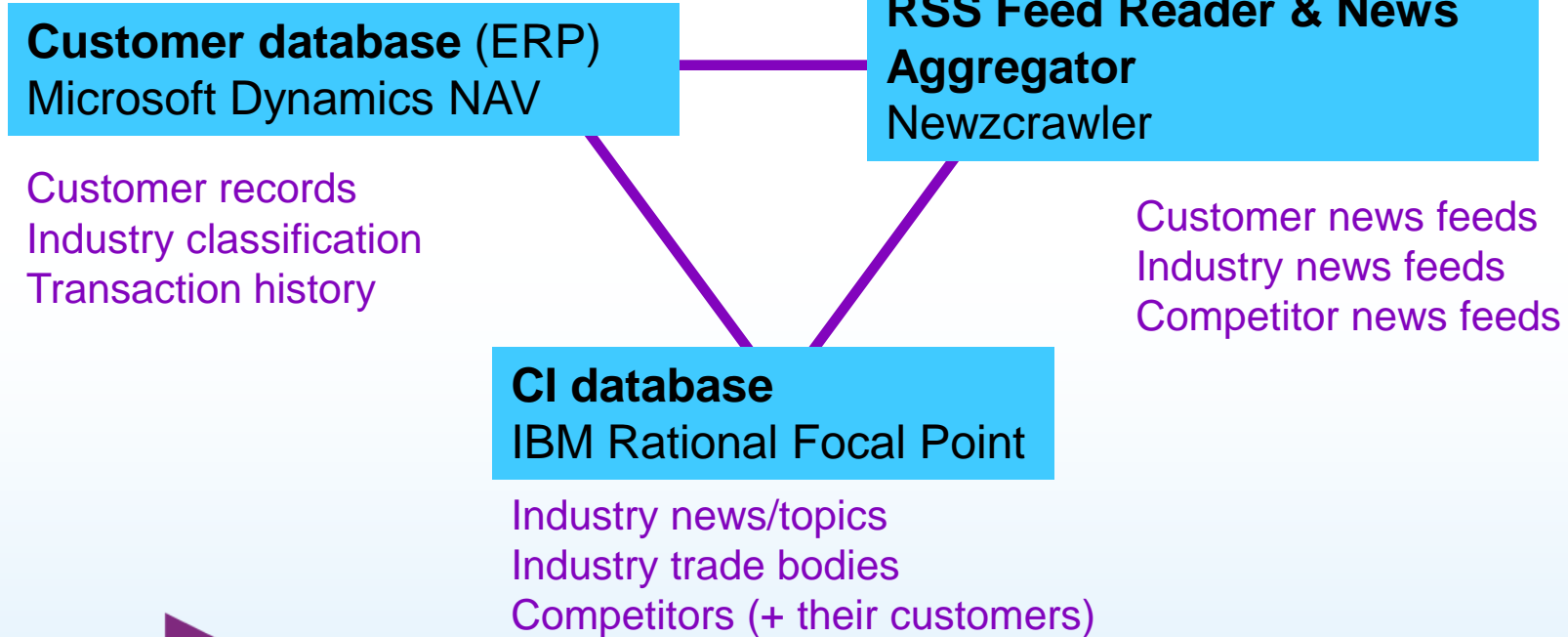
Ambient temp profile



Product market landscape



CI linkage to other resources



Summary

- **The company & complex trading environment**
- **CI – A strategic business driver**
- **Functional requirements & finding a software solution**
- **Overview of the RFP CI workspace**

