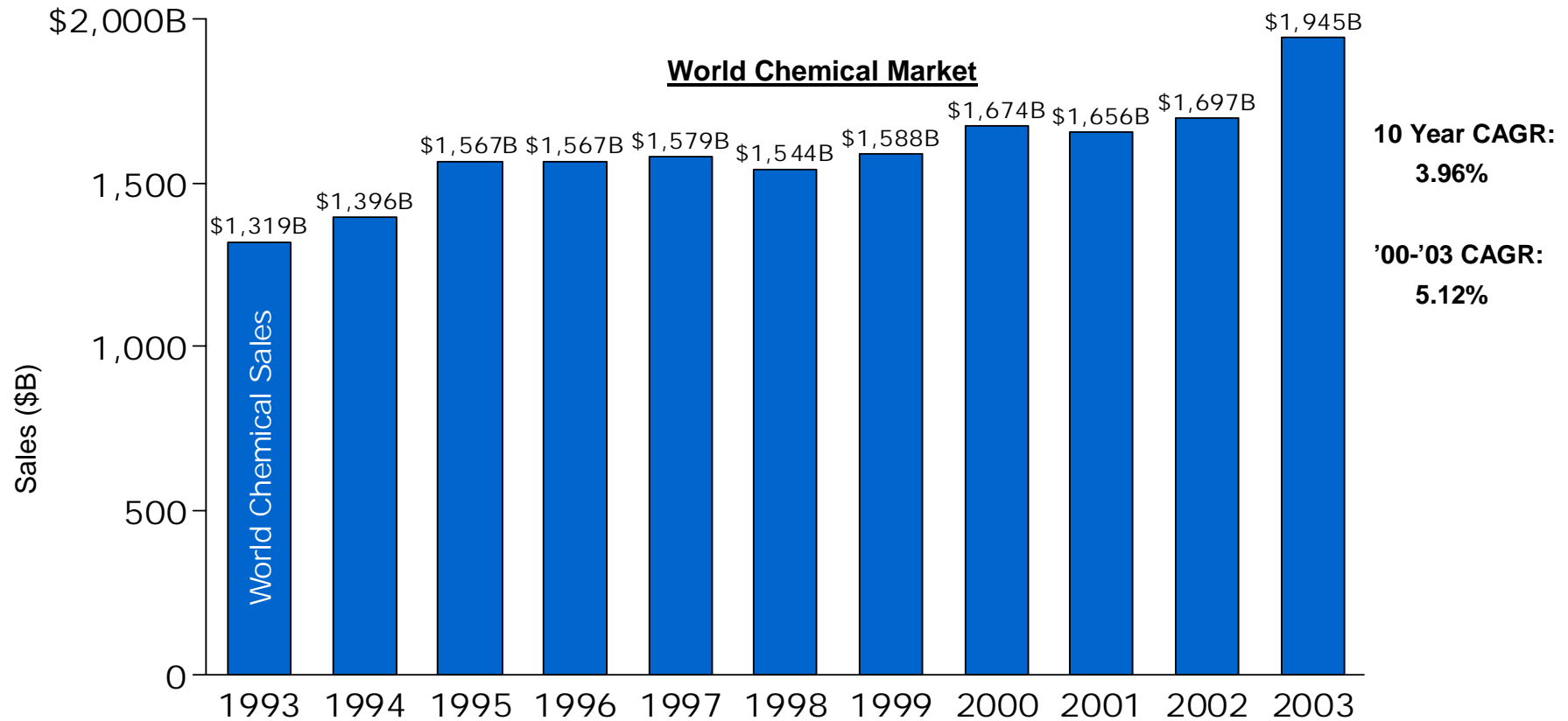


Islands in the stream or going with the flow

The relative merits of different
models for information dissemination
within chemical organisations

Market Overview - Size and Growth

Long – term growth in chemicals rests around 4%, although the industry is cyclical, as evidenced by the current upward trend.



Market Overview - Market Drivers

The chemical industry is recovering, and future growth looks promising.

Market Drivers

Product Demand / Sales – reliant on the health of the economy, specifically the manufacturing sector. Demand for consumer products drives demand for chemical raw materials.

Costs / Earnings – highly reliant on the price of oil & natural gas. These are used as both raw materials and as a source of energy in production.

Other Impacts – the regulatory environment in specific countries and in world-wide initiatives results in barriers or added costs for chemical manufacturers.

Trends

~2000 - 2002: Increases in energy prices lead to a margin squeeze in the chemical sector as chemical prices are relatively fixed.

~2003+: Chemical companies have more leverage over prices, which are increased as energy prices remain high, and margins recover.

~2000 - 2005: Countries with significant chemical production have fairly standard regulatory requirements.

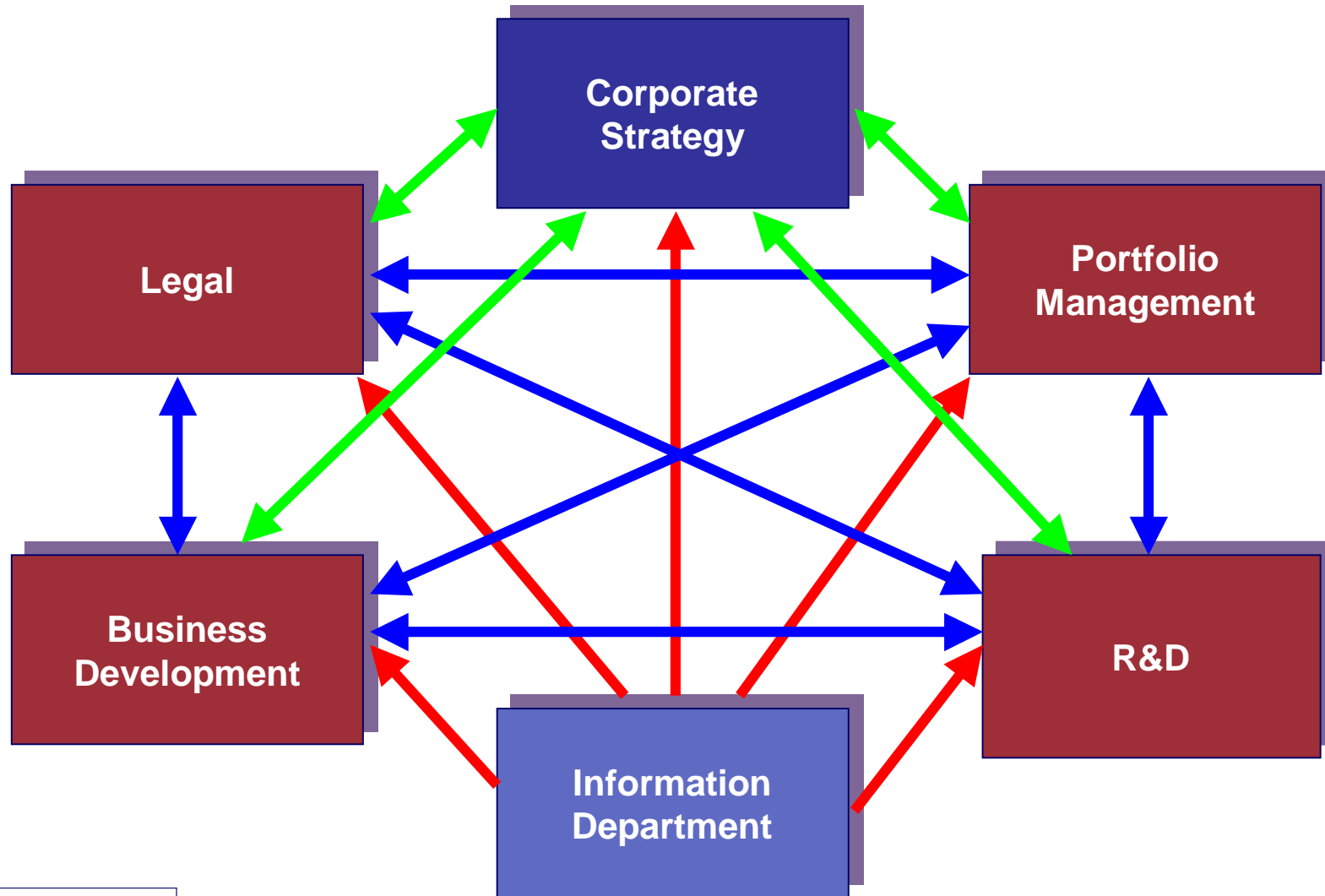
~2006+: The Kyoto Protocol will affect production and increase costs in chemical manufacturing.

Through 2002, the industry struggled with limited demand and/or constrained margins. Since that time, more leverage over pricing and a world-wide recovery/expansion has led to improvement in this industry. Future regulatory limitations will be more than overcome by expansion in developing countries and potential breakthroughs in specialty chemicals, particularly pharmaceuticals.

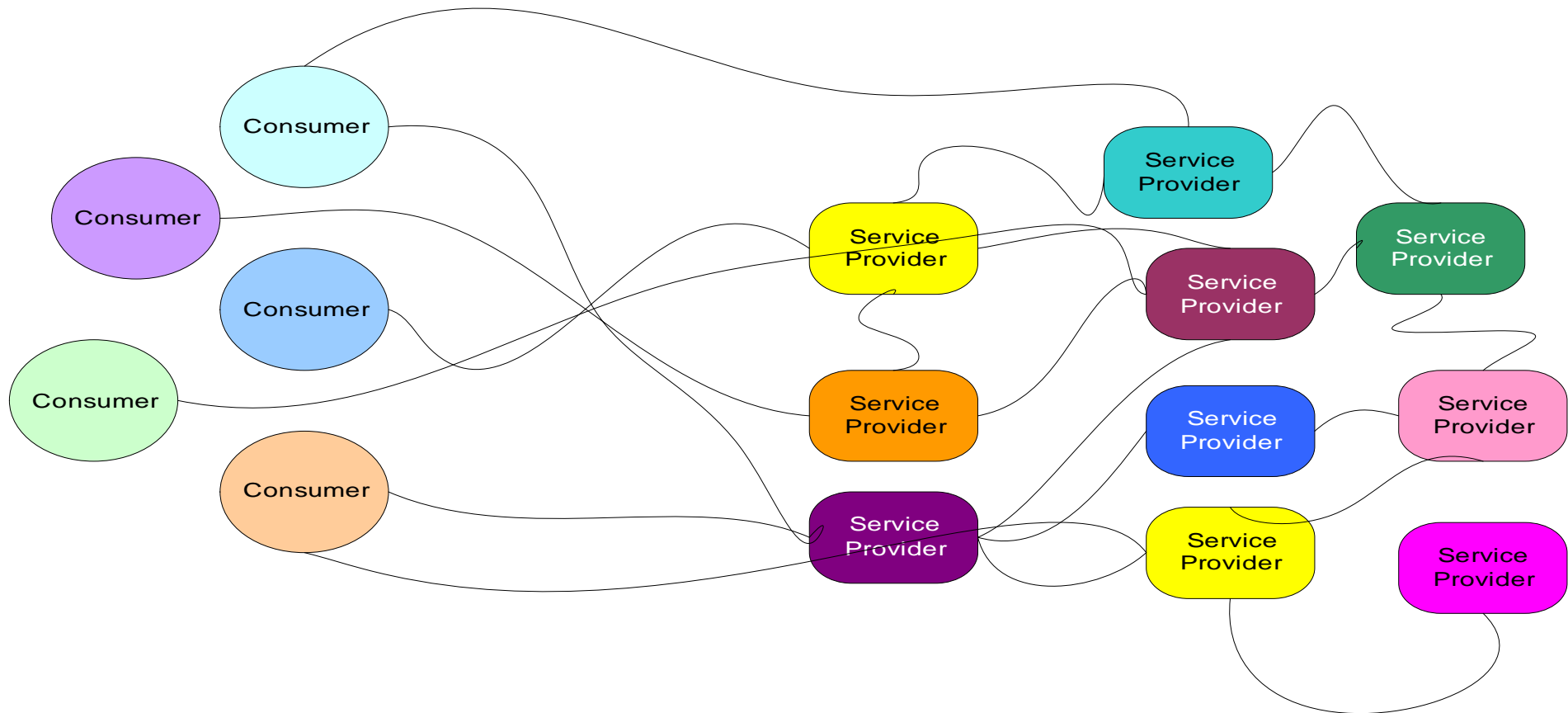
Information drives businesses forward

- **Protect IP and Avoiding Litigation**
- **Understanding new technology development and trends**
- **Licensing, acquisitions and spin-offs**
- **Tracking Competition**
- **New entries and gaps in the market**
- **R&D Strategy Development**
- **Reduce time to market for new developments**

Information Workflow Example



The N² Problem

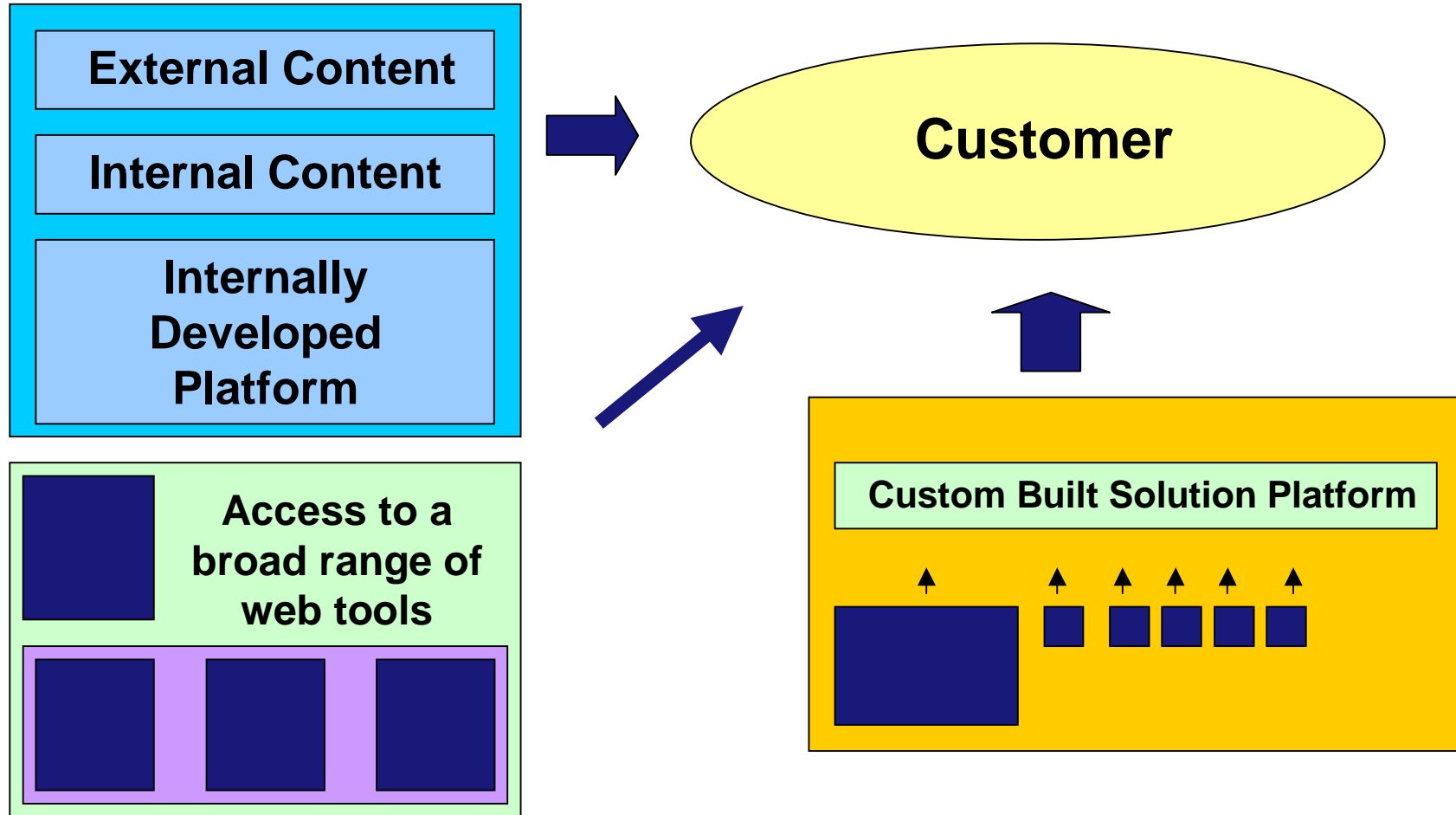


Challenges to information workflow processes

- Historically
 - Time to reach user
 - Ensuring maximum recall
 - Varying format types
- Today
 - Volume of information available
 - Relevancy vs. maximum recall
 - Managing multiple access points
 - Training both professionals and end user to access data

Options for delivering information solutions

In house



Case 1: In house design with external data feeds model

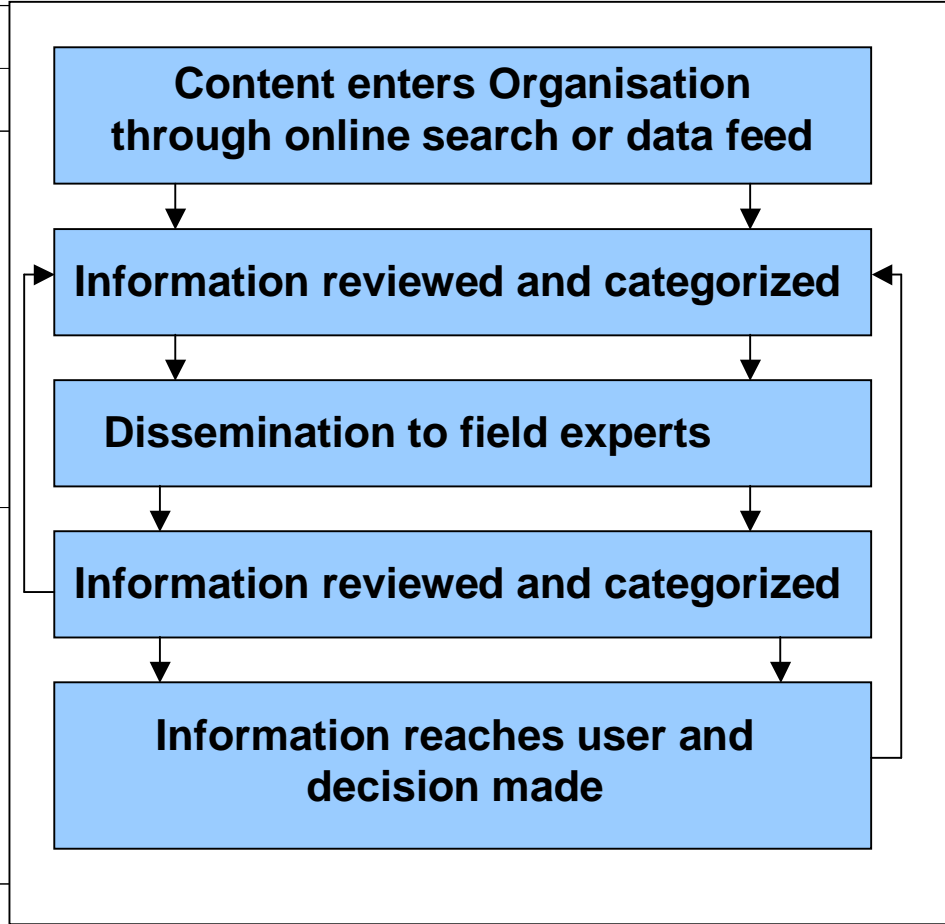
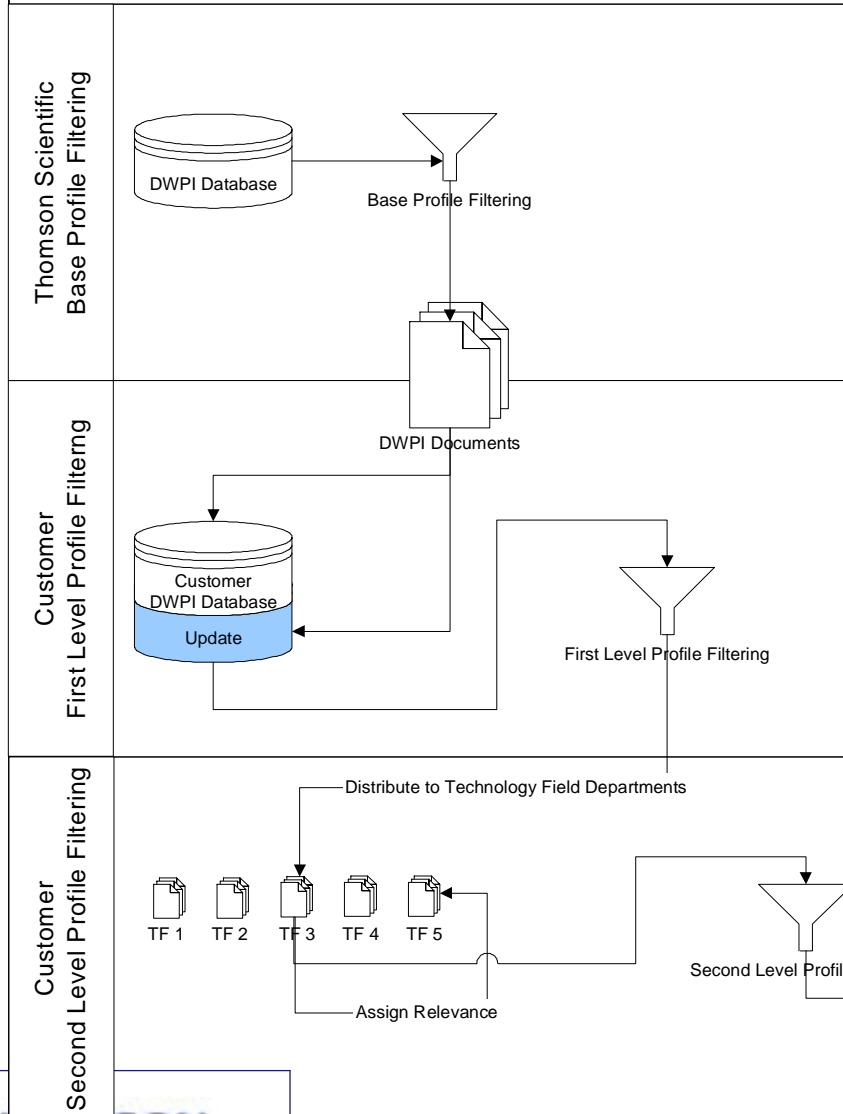
- Enabling seamless access for both the Professional and End User searcher's
- Driven by a core group of expert Information Professionals
- Comprehensive understanding of both a broad range of content sets and platform design essential
- Direct content feeds – less reliance on content provider platforms
- Developing long term partnerships with content vendors
- Great example of this model in operation is BASF AG

Maggots in Paridise – Work for Gardeners. Dr U. Schoch Grübler, BASF AG, IPI-ConfEx, March 2004.

Case 2: Custom solutions built to business requirements

- Enabling seamless access for both the Professional and End User searchers aligned into specific work groups
- Content decisions driven by a core group of Information Professionals
- Platform design and workflow system built in partnership directly with a content provider
- Delivery of content streamlined to the exact requirements of the business
- Challenge of integrating data from multiple vendors
- Resulting in:
 - Fast dissemination to relevant technology groups
 - Proactive management of patent portfolio
 - Rapid response to competitor activities

Sample Alerting Workflow in iEPROS Solutions



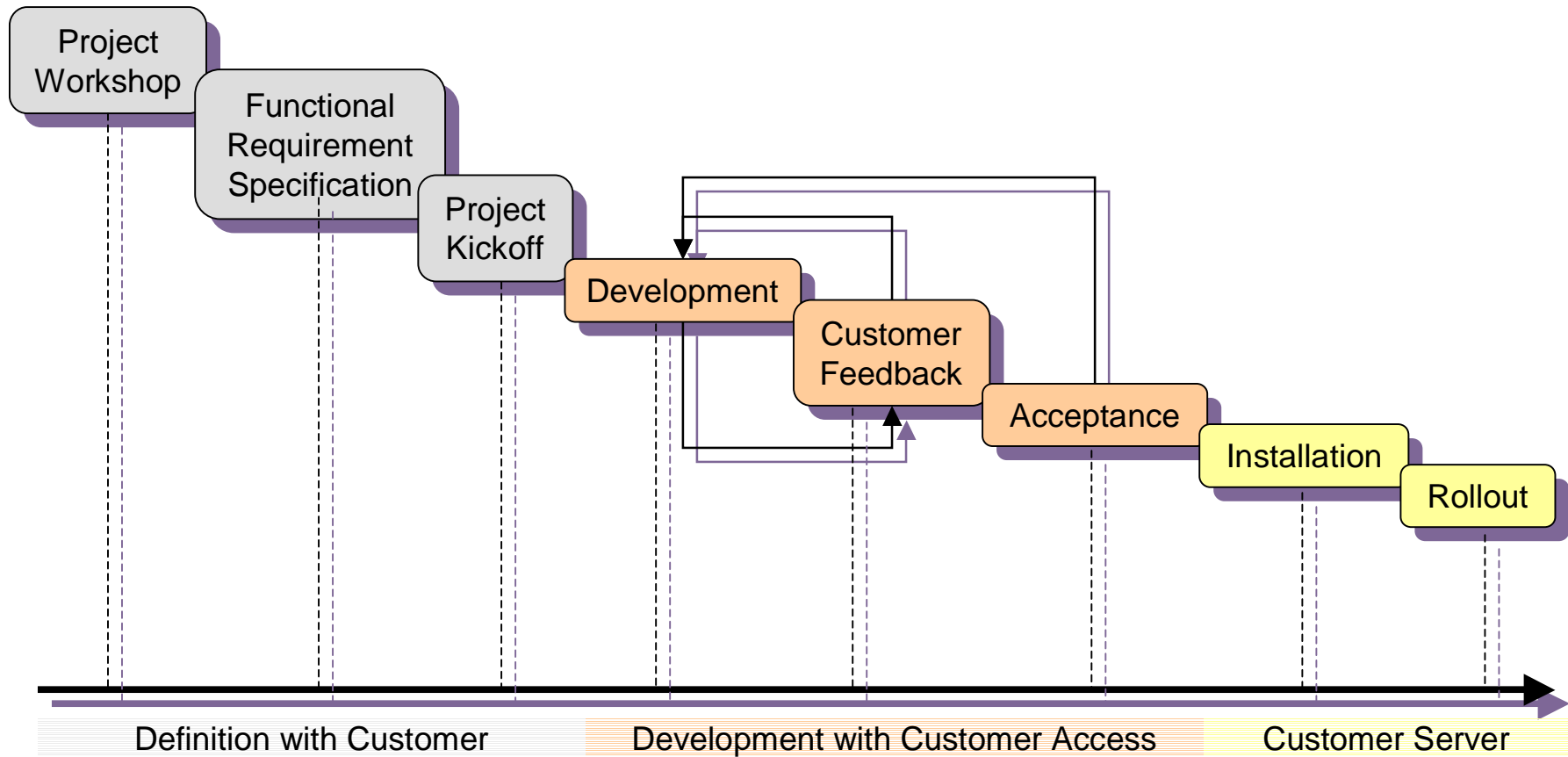
Increased visibility for the Information Professional

- The Information Professional role has never been more important
- Both Business and Research sections have a greater reliance on the Information Professional
- Budgets versus the volume of information
- Direct ability to drive information strategy forward based on organisational requirements
- Ability to inspire innovation within R&D through providing the right quantity of data in the right context.

How are vendors adapting to industry needs

- Greater collaboration with vendors to gain greater input on product design
- Customization in line with specific business requirements – solutions development
- Aggregation of data and expansion of coverage
- Relational linking across both Scientific, Legal and Financial data
- Evolving historical indexing in line with new technologies
- Continued investment in infrastructure

Customer Orientated Development Process



In Conclusion

- The challenges to effectively managing information are continuing to grow
- The emergence of the Information Tsar
- There are many different approaches to disseminating information to specific user communities
- A greater number of organisations are building custom solutions internally or through technology partnerships

Thank You!

Richard.neale@thomson.com