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BEST PRACTICES

2026
SOUTHEAST ASIAN CONTRACT RESEARCH ORGANIZATIONS
CUSTOMER VALUE LEADERSHIP

Prodia the CRO
YOUR RELIABLE PARTNER IN CLINICAL STUDIES

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Best Practices Criteria for World-Class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each recognition category before determining the final recognition recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. PT Prodia Diacro Laboratories excels in many of the criteria in the contract research organizations space.

RECOGNITION CRITERIA

Business Impact	*Customer Impact*
Financial Performance	Price/Performance Value
Customer Acquisition	Customer Purchase Experience
Operational Efficiency	Customer Ownership Experience
Growth Potential	Customer Service Experience
Human Capital	Brand Equity

Southeast Asia's Clinical Research Evolution: Creating New Opportunities for Customer-Centric CROs

The Southeast Asia (SEA) contract research organization (CRO) market is entering a new phase of growth as global pharmaceutical, biotechnology, and medical device companies diversify their clinical development strategies beyond traditional research hubs. Escalating drug development costs, more complex clinical protocols, and the rapid expansion of small- and mid-sized biopharmaceutical companies are driving demand for agile, high-quality CRO partners while prompting sponsors to seek more efficient clinical development destinations. Benefiting from the broader momentum across Asia-Pacific, where Frost & Sullivan projects the CRO market to grow at a compound annual growth rate of 17.2% from 2024 to 2030, SEA is increasingly emerging as a strategic hub for regional and global clinical research.[1] Its cost-competitive clinical development environment, maturing regulatory frameworks, large and ethnically diverse patient populations, and growing research capabilities continue to strengthen its appeal to multinational sponsors.

Within this dynamic landscape, Indonesia is establishing itself as a key driver of SEA's clinical research growth. As the region's largest economy and home to more than 280 million people, the country offers sponsors access to one of the world's largest and most diverse patient populations, providing significant advantages for studies requiring broad, representative patient cohorts. Backed by sustained investments

[1] *Pharmaceutical Clinical Contract Peripheral Services, Global, 2025–2030* (Frost & Sullivan, March 2025).

in healthcare infrastructure, digital health, and laboratory capabilities, Indonesia is strengthening its ability to facilitate sophisticated clinical research, including decentralized and hybrid trial models that extend research beyond urban centers. At the same time, ongoing regulatory reforms and regional harmonization initiatives, such as the ASEAN Common Technical Document and Joint Assessment programs, are improving approval predictability and study start-up timelines, further bolstering the country's appeal as a destination for regional and multinational clinical development programs.

Despite Indonesia's increasing prominence within SEA's clinical research landscape, structural challenges continue to shape the market. Clinical development expertise and infrastructure remain concentrated in Jakarta and a limited number of major urban centers, resulting in uneven site readiness and investigator capacity across the archipelago. Moreover, as clinical trial protocols become more complex, sponsors require broader investigator networks, more efficient regulatory pathways, and laboratory partners capable of delivering standardized sample management, specialized testing, and globally accepted quality standards. Growing demand for specialized outsourced services, including pharmacovigilance (PV), central laboratory support, and data management, is further raising expectations for CROs to provide both comprehensive end-to-end solutions and targeted functional expertise.

Meeting these evolving sponsor expectations has become a defining factor for success in the SEA CRO market. Cost competitiveness alone is no longer sufficient. Leading organizations must combine deep local regulatory expertise with international best-practice quality systems, integrated service delivery models, robust investigator and hospital networks, advanced laboratory infrastructure, and technology-driven operations that improve efficiency across the clinical development lifecycle. The ability to seamlessly support both comprehensive outsourcing engagements and specialized functional services is also becoming a critical competitive differentiator. Equally important is CROs' ability to augment local research ecosystems by increasing site capacity, developing investigator expertise, and enabling broader participation in regional and global clinical trials. Organizations that successfully integrate these strengths can simplify study execution, accelerate development timelines, and deliver greater long-term value for sponsors.

Against this backdrop, PT Prodia Diacro Laboratories (Prodia the CRO) stands out as a compelling example of how customer-centric CROs can build sustainable competitive advantage in the regional market. By combining deep local regulatory expertise with an integrated clinical research ecosystem and internationally recognized quality standards, the company is well equipped to support both end-to-end clinical development programs and specialized outsourced services, enabling it to address sponsors' changing requirements while supporting Indonesia's growing role in regional clinical development.

Prodia the CRO: An Integrated Clinical Research Ecosystem for Indonesia and Southeast Asia

Established in 2008 as a dedicated CRO within the Prodia Group, Prodia the CRO has played a pioneering role in shaping Indonesia's modern clinical research ecosystem. Its origins, however, extend much further. The company's foundation is built on decades of clinical laboratory expertise developed by the Prodia Widyahusada, whose clinical laboratory activities began in 1973. In 1997, Prodia expanded its capabilities by establishing a dedicated central laboratory services division for clinical trials. To further strengthen its clinical research capabilities, Prodia CRO was established as a dedicated contract research organization (CRO) in 2008, providing integrated laboratory and non-laboratory services for clinical research. This longstanding heritage has underpinned Prodia the CRO's evolution into one of Indonesia's leading independent CROs, providing the expertise, industry relationships, and operational depth needed to support increasingly complex clinical research for domestic and multinational sponsors.

As sponsor requirements became more sophisticated and the domestic clinical research ecosystem matured, Prodia the CRO evolved well beyond the scope of a traditional CRO. Recognizing the growing need for stronger site readiness, performance consistency, and specialized laboratory support, the company progressively broadened its capabilities to include site management organization (SMO) services, consumer product clinical assessment (CPCA), and PV, alongside continued investments in its laboratory and clinical trial management capabilities. As a result, Prodia the CRO addresses many of the operational challenges unique to Indonesia while strengthening the country's capacity to participate in regional and global clinical research.

> *"As evolving PV requirements demand robust safety monitoring and post-marketing surveillance, Prodia the CRO is developing a comprehensive in-house PV capability to supporting individual case safety reporting, signal detection, risk management planning, periodic safety reporting, and broader PV system implementation. By proactively investing in a capability that remains largely underserved within the Indonesian market, the company is broadening its end-to-end service offering and enabling sponsors to meet stringent compliance and patient safety requirements throughout the product lifecycle."*
>
> ***- Unmesh Lal***
> ***Vice President***

Today, the company distinguishes itself through a fully integrated, one-stop clinical research ecosystem that unifies regulatory consulting, clinical trial management, SMO services, central laboratory support through Prodia Laboratory, CPCA, and PV services. This end-to-end operating model allows sponsors to engage a single trusted partner throughout the clinical research lifecycle, combining comprehensive service delivery with the flexibility and responsiveness of an independent CRO. By minimizing vendor fragmentation and ensuring seamless coordination across functions, Prodia the CRO improves operational efficiency, enhances study consistency, and reduces execution risk.

A key differentiator of Prodia the CRO's integrated model lies in its ability to leverage the synergies across the Prodia Group. Through close collaboration with PT Prodia Widyahusada Tbk (Prodia Laboratory), Indonesia's largest clinical laboratory network and the country's only College of American Pathologists (CAP)-accredited clinical laboratory, the company provides standardized sample management, comprehensive and study-specific laboratory testing designed to meet the specific requirements of each study, and high-quality laboratory support across research sites nationwide. Combined with its established relationships with investigators, hospitals, research institutions, and regulatory authorities, Prodia the CRO strengthens this ecosystem through sustained investments in site development and Good Clinical Practice (GCP) training. Together, these capabilities enable the company to deliver globally aligned research standards while effectively supporting studies across diverse therapeutic areas and development phases.

The impact of this long-term commitment is reflected in measurable ecosystem outcomes. These investments have contributed to the development of more than ten clinical research units (CRUs), supported GCP certification for more than 5,000 physicians, and enabled over 110 clinical studies to actively recruit participants in Indonesia, underscoring Prodia the CRO's significant contribution to expanding the country's clinical research capacity.[2]

Together, these strengths position Prodia the CRO as more than Indonesia's leading independent CRO. The company serves as a strategic gateway for multinational pharmaceutical, biotechnology, and medical device sponsors seeking efficient access to the country's complex regulatory and clinical research environment. At the same time, by expanding international collaborations and regional partnerships, the company is extending this role beyond national borders, enabling sponsors to leverage Indonesia as a foundation for broader clinical research programs across SEA.

Extending Competitive Advantage Through Innovation, Strategic Partnerships, and Operational Excellence

As SEA's clinical research market continues to mature, Prodia the CRO remains focused on extending its competitive advantage by anticipating emerging sponsor requirements and investing in capabilities that support the next generation of clinical research. Rather than relying solely on its established integrated ecosystem, the company continuously broadens its service portfolio, strengthens strategic partnerships, and adopts internationally recognized best practices to ensure it remains aligned with evolving scientific, operational, and regulatory expectations.

> *"Building on Indonesia's growing attractiveness as a clinical research destination, the company has expanded industry partnerships in addition to actively engaging global sponsors, regulators, and industry leaders through international forums such as CRM Trial Connect and DIA events. These collaborations broaden access to multinational clinical development programs, support multi-country trial execution, and reinforce Prodia the CRO's role as a trusted regional partner capable of connecting international sponsors with opportunities across SEA."*
>
> ***- Sama Suwal***
> ***Best Practices Research Analyst***

One of the company's most significant recent initiatives has been the expansion of its PV capabilities in response to Indonesia's changing regulatory landscape and the growing emphasis on product safety throughout the clinical development lifecycle. As evolving PV requirements demand robust safety monitoring and post-marketing surveillance, Prodia the CRO is developing a comprehensive in-house PV capability to supporting individual case safety reporting, signal detection, risk management planning, periodic safety reporting, and broader PV system implementation. By proactively investing in a capability that remains largely underserved within the Indonesian market, the company is extending its end-to-end service offering and enabling sponsors to meet stringent compliance and patient safety requirements throughout the product lifecycle.

Alongside these capability-building efforts, Prodia the CRO continues to build its regional presence through strategic collaborations with international CROs and research partners. Building on Indonesia's growing attractiveness as a clinical research destination, the company has expanded industry partnerships in addition to actively engaging global sponsors, regulators, and industry leaders through international

[2] https://prodiathecro.com/about-us/who-we-are/

forums such as CRM Trial Connect and DIA events. These collaborations broaden access to multinational clinical development programs, support multi-country trial execution, and reinforce Prodia the CRO's role as a trusted regional partner capable of connecting international sponsors with opportunities across SEA.

The company is also investing in laboratory innovation to support increasingly complex and diverse requirements of clinical research. Prodia CRO collaborates closely with Prodia Laboratory, which continuously expands its laboratory capabilities beyond routine diagnostic testing through its dedicated Research Support Division, supporting study-specific laboratory requirements, while augmenting infrastructure for advanced laboratory services that address the growing demand for precision medicine and more sophisticated clinical trial protocols. These investments allow sponsors to conduct a broader range of specialized analyses within Indonesia, reducing reliance on overseas laboratories and improving turnaround times, operational efficiency, and data consistency.

Complementing these strategic investments is Prodia the CRO's commitment to continuous excellence through the adoption of international best practices. The company maintains a strong quality culture built around regularly updated standard operating procedures, continuous staff development, risk-based monitoring, corrective and preventive action (CAPA)-driven quality management, technology-enabled study oversight, and key performance indicator-based performance monitoring. Close coordination across its integrated CRO, SMO, CPCA, PV and laboratory functions further enhances operational consistency by enabling proactive issue identification and rapid resolution throughout study execution. The company also works closely with regulators, industry organizations, and international clinical research forums to continuously strengthen its operating model. These collaborations help Prodia the CRO stay aligned with changing regulatory expectations, including emerging ICH GCP E6(R3) standards, alongside improving site start-up processes, quality assurance, and study execution. Overall, these practices empower Prodia the CRO to consistently meet the expectations of multinational sponsors operating under global clinical research standards.

Through this combination of continuous capability expansion, regional collaboration, laboratory innovation, and disciplined operational excellence, Prodia the CRO is strengthening a competitive position that differentiates it from traditional CRO providers. Frost & Sullivan believes the company's commitment to anticipating market needs and continuously investing in quality, technology, and ecosystem development positions it to deliver sustainable customer value across SEA's dynamic clinical research landscape.

Delivering Superior Customer Value Through Integration, Quality, and Partnership

Prodia the CRO's integrated operating model translates directly into measurable customer value by simplifying study execution, improving operational efficiency, and delivering a compelling price-to-performance proposition. Instead of coordinating multiple vendors across the clinical development lifecycle, sponsors benefit from streamlined governance, faster decision-making, and reduced administrative complexity through a single coordinated partner. Coupled with Indonesia's cost-competitive clinical research environment and Prodia the CRO's globally recognized quality standards, this approach enables sponsors to optimize study costs and overall performance without compromising quality or regulatory compliance.

The value of this approach is reflected in consistent sponsor feedback. Customers frequently cite the efficiency improvements gained from a single point of coordination, which simplifies communication, reduces handoffs between multiple vendors, and enables faster decision-making throughout study execution. At the same time, the company's close integration with Prodia Laboratory provides sponsors with added confidence in sample management, laboratory testing, and data quality through CAP-accredited processes and standardized procedures across multiple research sites. For multicenter studies, Prodia Laboratory's nationwide network further enhances customer value by facilitating efficient sample logistics and consistent laboratory support regardless of study location.

"Although we conducted the study at a difficult facility, CRAs worked very hard to manage the study. We appreciate it so much!!"

- Japan Pharmaceutical Company[3]

In addition to its operational excellence, Prodia the CRO has developed a customer engagement model centered on proactive collaboration throughout the study lifecycle. The company works closely with sponsors from the earliest feasibility assessments, often before contract execution, to address specific requirements, identify potential risks, and accelerate study start-up.

Once studies are underway, structured cross-functional coordination, regular project reviews, transparent communication, and clearly defined performance indicators enable rapid issue resolution while ensuring sponsors maintain visibility into study progress. Complemented by post-study feedback mechanisms and a CAPA framework, this continuous improvement approach enables Prodia the CRO to refine its service delivery while fostering long-term customer trust and accountability.

"Cooperation with Prodia is going very well, all services performed in accordance with SOP, and the employees are communicative."

- Research Institution (Hospital)[4]

These capabilities have become increasingly important as sponsor expectations continue to evolve. Beyond scientific expertise, customers prioritize regulatory knowledge, execution speed, integrated service delivery, data quality, and the ability to consistently operate according to global standards. Prodia the CRO's combination of extensive clinical research experience, deep local regulatory expertise, a broad network of key stakeholders including regulatory authorities and principal investigators, internationally aligned quality systems, and integrated operating model enables the company to address these priorities effectively across interventional clinical trials, real-world evidence (RWE) studies, and a broad range of therapeutic areas, serving multinational pharmaceutical companies, biotechnology firms, and regional sponsors alike.

The company's customer-centric approach has also translated into sustained commercial momentum. Rather than focusing on individual transactions, Prodia the CRO emphasizes long-term strategic partnerships built on consistent delivery, transparency, and operational excellence. This approach has helped the company consistently convert initial project engagements into broader multi-program

[3] https://prodiathecro.com/
[4] Ibid.

collaborations, including exclusive partnerships with regional and global CROs that have designated Prodia the CRO as their preferred partner in Indonesia. These expanding relationships demonstrate the confidence sponsors place in the company's ability to consistently deliver high-quality execution, regulatory expertise, and integrated clinical research support, reinforcing its reputation as a trusted partner for clinical development across SEA.

Sustaining Growth Through Brand Strength, Strategic Expansion, and Long-Term Vision

The strong customer relationships and operational capabilities that underpin Prodia the CRO's success are also creating a solid foundation for sustained long-term growth. Since 2025, the company has experienced continued expansion in both project volume and complexity, driven by Indonesia's strengthening regulatory environment and rapid development of its clinical research ecosystem, which attracts increasing interest from multinational and regional sponsors. Beyond a growing pipeline of clinical studies, Prodia the CRO is supporting a larger proportion of complex global development programs requiring extensive clinical research experience especially in study management, integrated laboratory services, advanced regulatory expertise, and coordinated multicenter execution. This momentum reflects growing sponsor confidence in the company and reinforces Indonesia's increasing prominence as a clinical research destination within SEA.

To sustain this momentum, Prodia the CRO continues to pursue a balanced growth strategy that combines portfolio diversification with regional expansion. The company supports a wide range of clinical research programs spanning pharmaceuticals, biosimilars, vaccines, consumer health and personal care studies, RWE studies, and medical device research. At the same time, it is bolstering its regional ambitions by developing Prodia Laboratory as a referral center for specialized clinical trial testing and increasing participation in multi-country clinical development programs across SEA. This measured approach enables Prodia the CRO to diversify growth opportunities while remaining responsive to evolving sponsor requirements and emerging market trends.

Underlying this strategy is the company's long-standing commitment to strengthening clinical research capacity in Indonesia. Through continued expansion of CRUs, the development of thousands of GCP-certified investigators, and close collaboration with hospitals, research institutions, and regulatory stakeholders, Prodia the CRO is supporting its own competitive position and Indonesia's broader clinical research ecosystem. These investments enhance national research readiness and create a virtuous cycle in which stronger infrastructure attracts increasingly sophisticated clinical studies, further reinforcing sponsor confidence and supporting sustainable long-term growth.

Overall, these strengths have allowed Prodia the CRO to build strong brand equity founded on technical excellence, regulatory expertise, integrated service delivery, and enduring customer trust. Rather than pursuing opportunistic expansion, the company has consistently invested in capabilities that anticipate future market needs while maintaining the flexibility and responsiveness of an independent CRO. Frost & Sullivan believes this disciplined approach, coupled with Prodia the CRO's growing regional reputation and continued commitment to advancing Indonesia's clinical research ecosystem, positions the company to sustain long-term growth and further strengthen its standing as one of SEA's most trusted clinical research partners.

Conclusion

Customer-centricity has become the defining characteristic of successful contract research organizations (CROs) in Southeast Asia (SEA), but lasting leadership requires a genuine commitment to simplifying clinical research while continuously adapting to sponsors' evolving needs. PT Prodia Diacro Laboratories (Prodia the CRO) exemplifies this approach through its integrated, one-stop clinical research ecosystem, which combines comprehensive end-to-end service delivery with the flexibility and responsiveness of an independent CRO. Coupled with sustained investments in innovation, quality systems, strategic partnerships, and clinical research capacity, this customer-first strategy enables the company to consistently improve study execution, reduce operational complexity, and deliver long-term value for sponsors. Frost & Sullivan believes Prodia the CRO's ability to anticipate market needs while strengthening Indonesia's clinical research ecosystem reinforces its leadership position in the SEA CRO market and solidifies its reputation as a trusted partner for regional and global clinical development.

With its strong overall performance, PT Prodia Diacro Laboratories earns Frost & Sullivan's 2026 Southeast Asia Customer Value Leadership Recognition in the contract research organizations industry.

What You Need to Know about the Customer Value Leadership Recognition

Frost & Sullivan's Customer Value Leadership Recognition identifies the company that offers products or services customers find superior for the overall price, performance, and quality.

Best Practices Recognition Analysis

For the Customer Value Leadership Recognition, Frost & Sullivan analysts independently evaluated the criteria listed below.

Business Impact

Financial Performance: Strong overall business performance is achieved in terms of revenue, revenue growth, operating margin, and other key financial metrics

Customer Acquisition: Customer-facing processes support efficient and consistent new customer acquisition while enhancing customer retention

Operational Efficiency: Company staff performs assigned tasks productively, quickly, and to a high-quality standard

Growth Potential: Growth is fostered by a strong customer focus that strengthens the brand and reinforces customer loyalty

Human Capital: Leveraging innovative technology characterizes the company culture, which enhances employee morale and retention

Customer Impact

Price/Performance Value: Products or services offer the best ROI and superior value compared to similar market offerings

Customer Purchase Experience: Purchase experience with minimal friction and high transparency assures customers that they are buying the optimal solution to address both their needs and constraints

Customer Ownership Excellence: Products and solutions evolve continuously in sync with the customers' own growth journeys, engendering pride of ownership and enhanced customer experience

Customer Service Experience: Customer service is readily accessible and stress-free, and delivered with high quality, high availability, and fast response time

Brand Equity: Customers perceive the brand positively and exhibit high brand loyalty, which is regularly measured and confirmed through a high Net Promoter Score®

Best Practices Recognition Analytics Methodology

Inspire the World to Support True Leaders

This long-term process spans 12 months, beginning with the prioritization of the sector. It involves a rigorous approach that includes comprehensive scanning and analytics to identify key best practice trends. A dedicated team of analysts, advisors, coaches, and experts collaborates closely, ensuring thorough review and input. The goal is to maximize the company's long-term value by leveraging unique perspectives to support each Best Practice Recognition and identify meaningful transformation and impact.

		VALUE IMPACT	
STEP		WHAT	WHY
1	**Opportunity Universe**	Identify Sectors with the Greatest Impact on the Global Economy	Value to Economic Development
2	**Transformational Model**	Analyze Strategic Imperatives That Drive Transformation	Understand and Create a Winning Strategy
3	**Ecosystem**	Map Critical Value Chains	Comprehensive Community that Shapes the Sector
4	**Growth Generator**	Data Foundation That Provides Decision Support System	Spark Opportunities and Accelerate Decision-making
5	**Growth Opportunities**	Identify Opportunities Generated by Companies	Drive the Transformation of the Industry
6	**Frost Radar**	Benchmark Companies on Future Growth Potential	Identify Most Powerful Companies to Action
7	**Best Practices**	Identify Companies Achieving Best Practices in All Critical Perspectives	Inspire the World
8	**Companies to Action**	Tell Your Story to the World (BICEP*)	Ecosystem Community Supporting Future Success

*Board of Directors, Investors, Customers, Employees, Partners

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The Growth Pipeline Generator™

Frost & Sullivan's proprietary model to systematically create ongoing growth opportunities and strategies for our clients is fueled by the Innovation Generator™.

Learn more.

Key Impacts:

- **Growth Pipeline:** Continuous Flow of Growth Opportunities
- **Growth Strategies:** *Proven Best Practices*
- **Innovation Culture:** Optimized Customer Experience
- **ROI & Margin:** *Implementation Excellence*
- **Transformational Growth:** Industry Leadership

The Innovation Generator™

Our 6 analytical perspectives are crucial in capturing the broadest range of innovative growth opportunities, most of which occur at the points of these perspectives.

Analytical Perspectives:

- Megatrend (MT)
- Business Model (BM)
- Technology (TE)
- Industries (IN)
- Customer (CU)
- Geographies (GE)