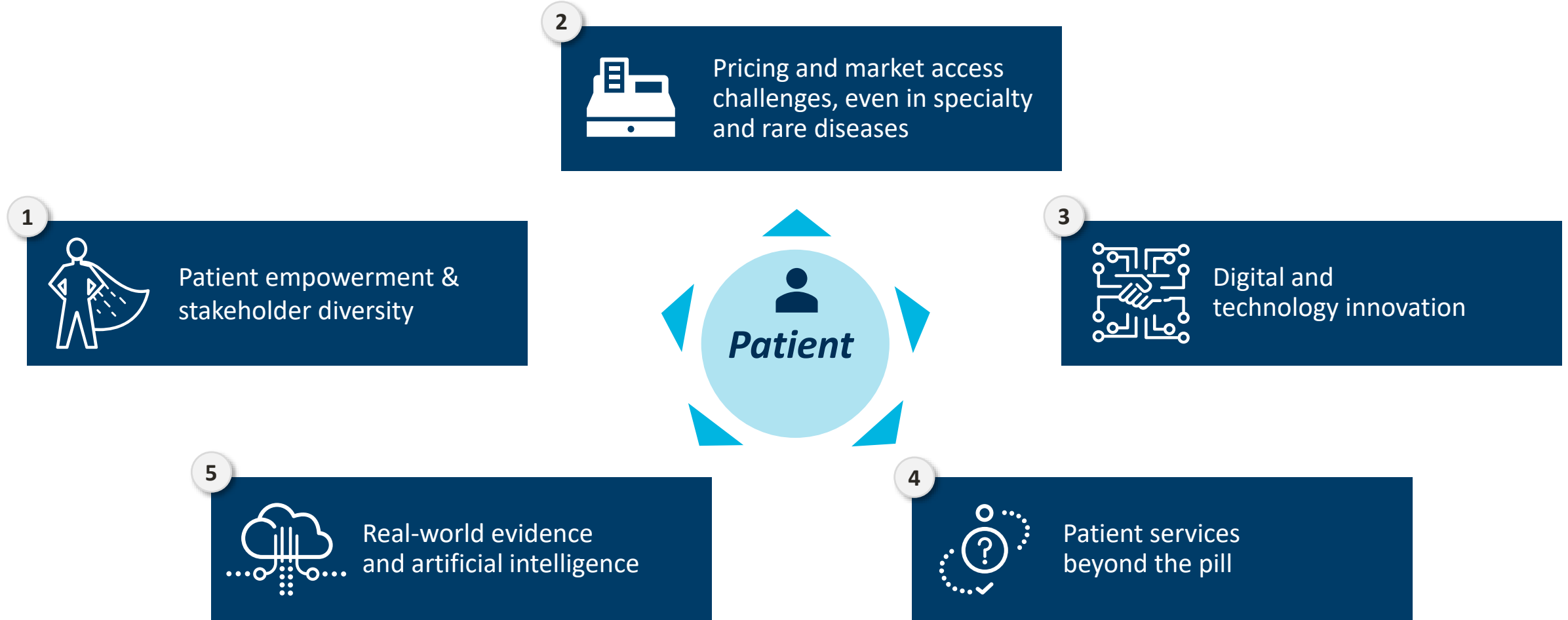




## The changing dynamics of the pharmaceutical industry

# The biotech and pharma fields are geared to adapt to new market drivers\*



# The HCP is no longer the sole decision maker

- Patients are more connected, informed and empowered to drive decisions
- A more complex ecosystem of stakeholders is centred around the patient
- Need to find way to connect with all stakeholders to ensure appropriate therapy use





# Growing patient demographics and Tx options drive price pressures

- Greater need for payers and prescribers to control product cost
- Rising cost of therapies becoming an issue even in specialty medicine and rare diseases
- Need to design and advocate for unique value and access approaches



# New technologies pave new avenues of interacting with customers

- New technologies offer support, connect the ecosystem, provide efficiencies and inform decision-making
- Need to overcome technology related limitations, and embrace new ways of delivering fast, relevant, appropriate information





# Patients are expecting more than just medicines

- Need for engagement across the patient journey
- Importance of exhibiting commitment to the therapy area and patient needs
- Need to provide *beyond the pill* support to patients





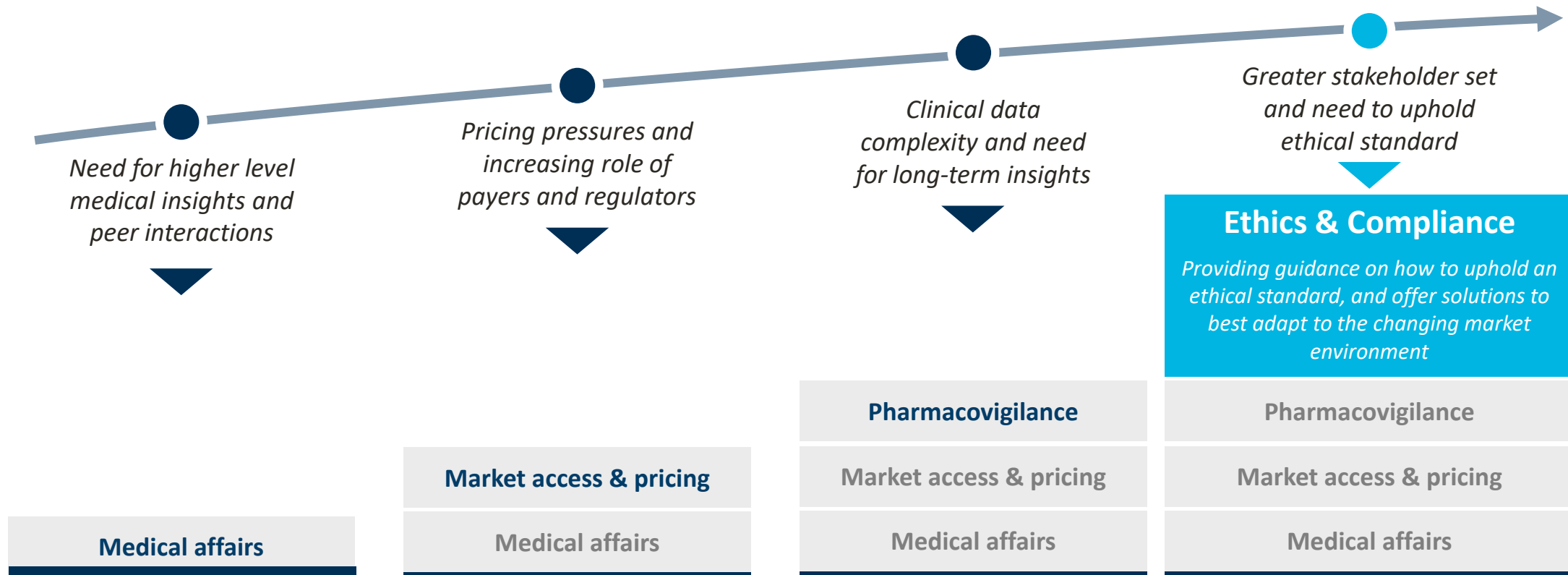
# Introduction of real-world evidence (RWE) and data

- HCPs, regulators and payers are seeking richer insights in real time
- RWE has changed the way data is captured and used
- Increased requirement to design better (faster, more informative) trials
- Need to extract and communicate insights from RWE and AI-based solutions



# Historically, changes in healthcare have impacted ways of working in the pharmaceutical industry

- As the industry is maturing over time, it became critical for key functions to get a more integral role





# 「Ethics & Compliance has matured and is now empowered to take a holistic viewpoint」

- Fully integrated across all functions, beyond commercial including HR, IT and analytics
- Related to organisational culture
- Important to be at the forefront of business decisions







What does this changing environment mean for the pharmaceutical industry?





We need to manage  
risks and stay  
competitive



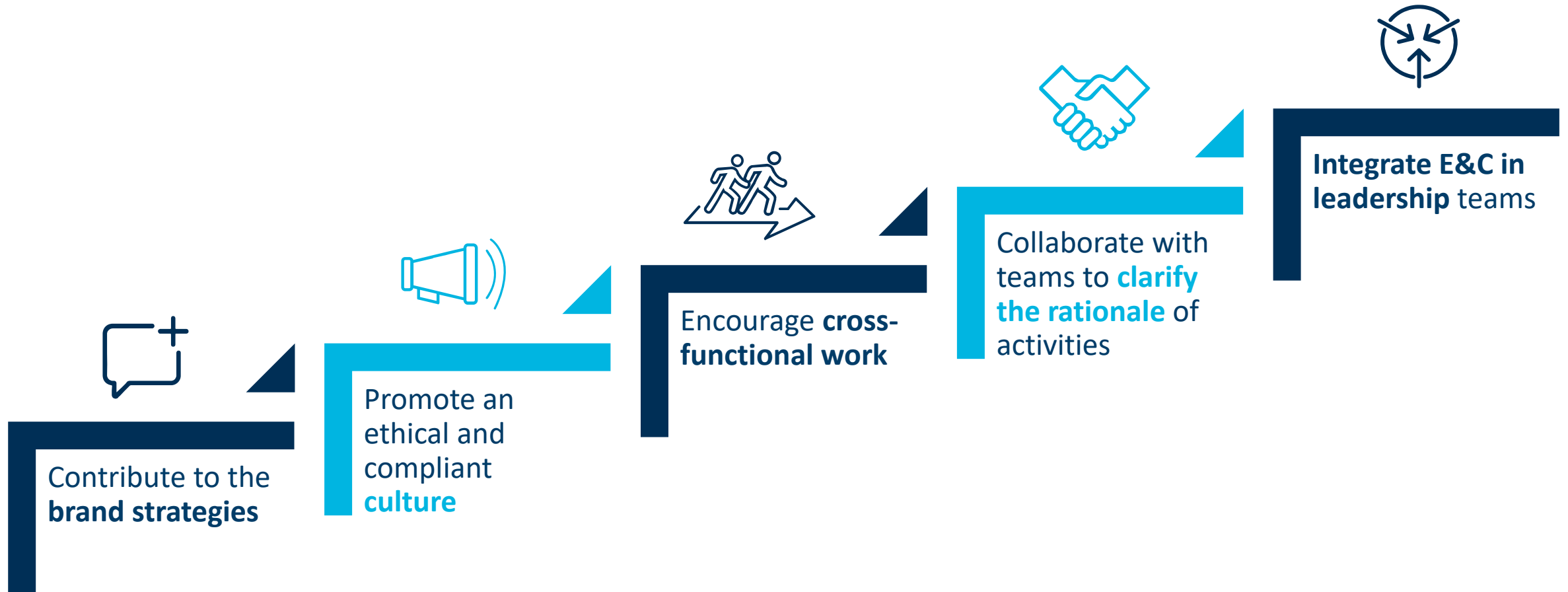




By embedding  
Ethics & Compliance  
in our DNA as a  
business



# How can ethics and compliance roles complement the needs of the new business model?





「With so many patients' needs unmet, there is still much to be done」



# Thank you

