



# EY Life Sciences Consulting

EY Strategy and Consulting Co., Ltd.



Building a better  
working world



# Contents

Life Sciences Leaders Message	03
Our Consulting Services	04
Representative Project Credentials in Japan	06
EY Life Sciences Differentiators	10
Providing Information for the Life Sciences Industry	11
Our Team	12
Thought Leadership Publications	14



# Life Sciences Leaders Message



## Tetsuro Sano

Japan Consulting Leader - Life Sciences Sector

The life sciences industry is currently in the midst of a wave of disruptive transformation. Skyrocketing costs of all varieties are jeopardizing the sustainability of not only certain companies in the industry but also the healthcare system itself. Reduction of healthcare costs has become a critical agenda for the government and it is seeking new ways of approach including incentives emphasizing value to patients' health. The progression of population aging, the rising presence of emerging markets and the increasing trend toward chronic illnesses are all creating an upward pressure on healthcare costs.

Meanwhile, digital health, with rapid evolution of mobile, big data and data analytics technologies, is making inroads into the industry, and various players continue to cross industry boundaries, creating new avenues for competition and collaboration.

We are now transitioning from the era of traditional healthcare focusing on the treatment of illnesses to a new era in which diverse actors take a central role in not only improving patients' health but also preventing diseases and providing real-time care.

We EY are here to help life sciences companies go ahead and continue growing in such a new era, and to create next social values together in the world of patient-centric, outcomes-driven, prevention-focused and cross-sector.



## Christian Boettcher

Asia Pacific Consulting Leader - Life Sciences Sector

Healthcare and life sciences have undergone many and major changes through the Covid pandemic. New advances through cell therapies, immune-oncology, and personalized / precision medicine using genome sequencing have brought hope to patients who previously had a grim future ahead of them. How to employ these new treatments in a way that avoids healthcare cost inflation is a key question we need to find an answer for. Japan, with the MHLW supporting innovative treatments we have a chance to help our clients bring these treatments to market. Japan with its rapidly aging society faces some serious funding issues for healthcare in the not so distant future. We can help to make healthcare access

and delivery more efficient and accessible. The challenges are many but alongside our clients, governmental agencies, and HCPs we can manage those challenges and improve healthcare in Japan.

At EY we are exposed to the cutting edge of global innovation in life sciences and healthcare. Our job is to take this to Japan and deploy those innovative systems and products. With our diverse and capable consultants working in teams we can be part of the change that is happening in Japan and even better lead some of those changes and innovations. We lead with passion, show compassion, and create an environment where our practitioners thrive and become a driving force in life science and healthcare innovation.

# Life Sciences Sector: Our Consulting Services

We bring all of our life sciences sector knowledge and expertise across the globe to provide the world-class consulting services, in terms of value creation as well as feasibility, for the entire value chain of the life sciences companies.

## Business

### Corporate Strategy

- Business growth strategy planning
- Corporate business plan development
- Corporate-wide DX strategy development
- Product portfolio analysis
- Strategic research and analysis
- Business model design
- Investment plan development
- Company-wide cost reductions
- Post merger integration

## R&D

- Clinical trials improvement and streamlining
- RWD strategy planning
- Open innovation strategy planning
- Portfolio management and governance
- Product life cycle management

## Supply Chain and Manufacturing

- Digital supply chain building
- Distribution management process building
- Pilot and optimization of commercial production
- CMO and CDMO management
- Product life cycle management
- Global operating model transformation
- Logistics strategy and network design

## Support

### Technology

- Operational improvements through ERP, CRM and BI implementation
- Operational improvements through RPA and AI implementation
- Cybersecurity management
- IT operational performance improvement
- Data life cycle management
- Implementation of ERP, CRM and BI tools
- Data protection and privacy

### Finance

- Finance strategy development
- Finance organization function enhancement
- Accelerated financial closing
- Shared service/global business service
- Business process outsourcing (BPO)





## Strategy

### Quality and Risk Management

- ▶ Enterprise risk management
- ▶ Compliance with regulations, standards and guidelines
- ▶ Quality management system rebuilding and DX promotion
- ▶ Assurance reports on a service organization's controls
- ▶ Internal audit outsourcing or co-sourcing (performing audit jointly)
- ▶ Internal controls establishing
- ▶ Sourcing and contract risk management
- ▶ Group governance enhancement
- ▶ Digital governance enhancement/improvement
- ▶ Business continuity management (BCM) enhancement/improvement
- ▶ Crisis management enhancement/improvement

### Medical

- ▶ Medical affairs business strategy development
- ▶ Medical Affairs DX strategy development
- ▶ Internal controls establishing
- ▶ PV strategy development
- ▶ PV operational improvement and automation

### Sales and Marketing

- ▶ New product launch strategy development
- ▶ Commercial excellence
- ▶ Commercial data analysis
- ▶ Omnichannel strategy development and execution
- ▶ Sales force effectiveness and ROI analysis
- ▶ Market access strategy
- ▶ Stakeholder analysis
- ▶ Patient and doctor journey analysis
- ▶ Patient strategy and adherence program development

## Functions

### Procurement

- ▶ Procurement performance management
- ▶ Category management and sourcing optimization
- ▶ Supplier strategy and relationship management
- ▶ Purchasing risk management

### Human Resources

- ▶ Organizational transformation
- ▶ Change management
- ▶ Organizational design
- ▶ HR costs and risk management
- ▶ HR system planning and implementation
- ▶ Leadership development
- ▶ Talent development and training



# Representative Project Credentials in Japan

## Corporate Strategy

**Support the establishment of a vision and the development of a management and business strategy for a new spin-out venture from a pharmaceutical company**

Business growth strategy planning

Client Challenge	Our Role	Our Value Added
<p><b>Promote innovation for new product development</b> Examine support relating to business strategy development and business startup for venture companies and entrepreneurs that have spun out from clients with the aim of promoting innovation and developing new products before competitors.</p> <p><b>Knowledge of venture company management</b> In order to establish and support the venture company, specialists with knowledge and experience of developing organizational structures and new business plans when starting up a business were needed.</p>	<p><b>Support the development of a strategy and vision for a venture company</b> Supported the development of a corporate strategy and medium-term business plan for a venture company, including establishing a vision and mission.</p> <p><b>Support the development of a management and business plan that maximizes the use of existing assets</b> Supported the development and implementation of a management and business designed to maximize results through the use of available assets such as existing patents and selective investment in R&amp;D.</p> <p><b>Support problem-solving in roadmap development and implementation</b> Developed a roadmap for venture company establishment to visualize progress, allowing for early detection of actual and potential issues and supported examination of improvement measures in order to minimize the risk of delays in implementation.</p>	<p><b>Providing best practices and EY's knowledge and insight relating to starting a business</b> Proposed best practices for sustainable venture company management and provided business preparation support relating to finance, legal, personnel and accounting issues while supporting business startup through the formulation of business strategies and operational policies based on EY's knowledge and insight relating to venture company management.</p> <p><b>Providing corporate management knowledge and know-how relating to venture company management</b> Improved soft and hard skills of management by providing learning opportunities relating to sustainable corporate management of venture companies.</p>

## Risk Management

**Support for business process reengineering to quality management system**

Reforming quality management systems

Client Challenge	Our Role	Our Value Added
<p><b>Rebuilding quality management systems that comply with applicable laws and regulations</b> With major regulatory changes, findings from external audits, and current trends in which more should be done for quality control, whose operations become stricter, the client was required to revisit their quality management systems so that they could improve their compliance and response to applicable laws and regulations. Therefore, they needed to rebuild a company-wide business process.</p> <p><b>Streamlining enlarged business process and improving governance</b> Business processes had been customized for each department and become very complicated. Client was asked to integrate these business processes while committing to governance across the company. In addition, they needed to remove inefficient processes such as physical document management.</p>	<p><b>Designed To-Be model and created implementation roadmap for the entire company</b> Reassessed issues of each department and reviewed the current standard operating procedures (SOP) and similar documents to define the quality management system. Based on the definition, created the To-Be model to explore solutions and designed a roadmap for the company-wide implementation of this model.</p> <p><b>Building cross-departmental project structure and supporting project management</b> Identified and involved internal and external stakeholders and supported coordinated among departments for alignment. Based on this coordination, rebuild a new business process.</p> <p><b>Detailing and improving on-site business processes</b> Based on the To-Be model, detailed specific business processes and reconfigured the SOP and operations manual. At the same time, supported the client in implementing computerized system validation and preparing required documents. After they adopted the new business process, prioritized issues and supported to improve the operational process.</p>	<p><b>Built To-Be model of quality management system</b> Created the To-Be model based on the defined quality management system. Using this model, succeeded in building a new business process that has improved a client's compliance, and resulted in more efficient work and digitization.</p> <p><b>Integrated and implemented business processes across the company</b> Systematically rearranged work descriptions and unified business processes that were previously customized for each department. Selected departments were asked to implement the integrated business process in advance of others to make agile improvements. After the implementation of selected departments, supported implementation to the entire company.</p> <p><b>Qualitative and quantitative analysis of improvements from the To-Be model</b> Assessed the impact of business reforms by qualitative and quantitative analysis of how business has improved. Identified and prioritized remaining issues and supported the client to develop an action plan for the future.</p>

## Risk Management

**Support for build of cybersecurity system**

Support for enhancing cybersecurity

Client Challenge	Our Role	Our Value Added
<p><b>Explaining to customers about the security of products</b> After a security incident at another company, the client received a flood of inquiries from medical institutions that are their customers asking about the security of medical devices connected to external networks. The situation was urgent, as with no in-house team dedicated to cybersecurity the sales reps were asked to provide quick explanations about products' network configurations and their security.</p> <p><b>Build of a company-wide cybersecurity system</b> With no dedicated cybersecurity team, and no system in place, the client needed to discuss how to tackle cybersecurity as a company while at the same time dealing with the immediate task of providing customers with explanations.</p>	<p><b>Develop materials for sales staff to use for explaining to customers, and provide training</b> Visualized the network configurations of key products and assessed their security. Created scripts for each inquiry from medical institutions for the sales reps who will deliver the explanation. Provided training at multiple sales offices to ensure sales reps understood the network configurations and security of the key products, and the scripts for explaining them.</p> <p><b>Develop roadmap and roles &amp; responsibilities for the cybersecurity system</b> Concurrently with handling immediate inquiries, held high-level discussions of the desired cybersecurity system, clarified the current situation, analyzed the gap between the to-be and the as-is situation, and developed a plan to narrow that gap.</p>	<p><b>Boosted sales reps' understanding of their company's products</b> Made it possible for sales reps to answer basic inquiries about the products' network configurations and security on their own, enabling a swifter response to medical institutions.</p> <p><b>Clarified the roadmap to building the cybersecurity system</b> Clarified the roadmap of actions that ensure the client's readiness of cybersecurity system; namely, from identification of information assets to risk assessment and risk mitigation planning, and also the provision of on-the-job training in all that.</p>

## R&D

### Support for the formulation of a development department strategy that makes use of data science

Clinical trials improvement and streamlining

Client Challenge	Our Role	Our Value Added
<p><b>Scope of data science measures</b> Possible measures making use of data science were being examined in order to maintain and strengthen competitiveness in terms of development with competitors who were engaging in extensive large-scale investment in this field.</p> <p><b>Realize utilization strategies that are consistent with in-house strategies</b> As the entry of technology companies and other businesses from different industries into the market was accelerating and life science solutions making use of data science were gaining prominence, rather than simply introducing technology, the company needed to focus on use that was consistent with its strategy in order to realize the benefits.</p>	<p><b>Identify opportunities for data science utilization</b> Specified opportunities for the utilization of data science based on business issues and needs identified through benchmarking surveys and interviews with internal and external experts.</p> <p><b>Evaluate and prioritize utilization opportunities</b> Clarified priority areas for future investment as a development department by prioritizing the specified opportunities for the utilization of data science based on EY's evaluation framework.</p>	<p><b>Introducing leading case studies and best practices</b> Supported the identification of opportunities for utilization of data science based on EY's knowledge of R&amp;D in the domestic and overseas pharmaceutical industries and in other industries.</p> <p><b>Providing optimal evaluation methods</b> Utilized EY's evaluation framework, including objective and strategic perspectives, to provide appropriate evaluation of opportunities for data science utilization that were suitable for the company and support the identification of priority areas for investment.</p> <p><b>Support for consensus building with overseas and domestic stakeholders</b> Supported communication between people involved in development, including at the overseas regional head office, and achieved accelerated implementation of the data science utilization strategy in Japan.</p>

## R&D

### Support for building data platform in R&D area

Data management strategy development and implementation

Client Challenge	Our Role	Our Value Added
<p><b>Building a platform utilizing RWD in R&amp;D area</b> The company had considered building a data platform to share and utilize data within the company to improve productivity in research and clinical development. However, there were not enough resources to resolve issues and to implement infrastructure, such as the use of RWD, and poor coordination between departments. There was an identified need to build a project management structure for these activities.</p> <p><b>Establishing rules for data utilization</b> Rules for handling new sensitive information had not been established within the company. Improvement to rules were required in conjunction with the platform build.</p>	<p><b>Formulating a framework for utilizing data in and outside the company as well as across divisions</b> Conducted interviews with each stakeholder regarding requests and issues related to data utilization. Formulated a data utilization framework based on compiled requests and issues.</p> <p><b>Supporting PMO for infrastructure development for data analysis</b> Conducted preliminary research for building data analysis infrastructure and supported for selecting vendors. Once vendor was selected, managed overall project progress and issues as a PMO.</p> <p><b>Supporting development and implementation of data governance</b> Supported risk identification and creating measures to establish rules including the response to new sensitive clinical information.</p>	<p><b>Formulated infrastructure development plan based on industry insight</b> Formulated data analysis infrastructure framework in line with client culture and features, based on EY's knowledge and experience of the life science industry. Additionally, through close coordination with each stakeholder for smooth project management, selected vendors for data infrastructure implementation.</p> <p><b>Created data governance framework plan</b> By leveraging knowledge and experience related to data governance development, created a data governance framework tailored to the client company.</p>

## Supply Chain

### Support for entry into the vaccine market

Supply chain design and execution to enter new market

Client Challenge	Our Role	Our Value Added
<p><b>New market entry into vaccine market new to the client</b> The client was required to develop an organization for prompt and stable vaccine supply that was a new market entry to the client. The client also needed to design a global supply chain and execute actual operations for quick delivery of the vaccine required from the market.</p>	<p><b>Creating internal systems</b> Designed internal and external systems for vaccine supply by collaborating with domestic and international parties both in- and outside the company. Managed specific actions and progresses.</p> <p><b>Responding to quality control issues</b> Identified quality control issues from production to logistics, and supported resolution through action to manage progresses.</p>	<p><b>Speed of creating internal systems</b> Involved internal departments, organized the project, and supported creation of a system for issues to be discussed and resolved by the project team.</p> <p><b>Vaccine delivery to market</b> Supported the market delivery process from production of substance and vaccine products by coordinating with parties domestically and internationally. Contributed to effective vaccine delivery in Japan.</p>

# Representative Project Credentials in Japan

## Medical

### Support for the development of a medium-term business plan for the medical department

Medical affairs business strategy development

Client Challenge	Our Role	Our Value Added
<p><b>Realize a management and operational plan to achieve a strategic vision</b> In order to realize the strategic vision of the client's medical department, it was necessary to develop a departmental management and operational plan while arranging the direction with management and promote activities for achievement.</p> <p><b>Need for a feasible plan that also has room for growth</b> After clarifying roles and responsibilities relating to regular and irregular operations based on the status of the departmental system, it was necessary to consider the feasibility of staffing for each measure while maximizing growth.</p>	<p><b>Define strategic goals and direction</b> Defined strategic goals and a direction for the development of a management plan to achieve the strategic vision.</p> <p><b>Verify the feasibility of the departmental management and operational plan</b> Refined the defined management and operational plan by visualizing the current work volume and verifying its feasibility, in addition to organizing the roles and responsibilities of each function manager in the medical department, which had not been clarified sufficiently in the past.</p>	<p><b>Making proposals based on EY's knowledge and case studies from other companies</b> Implemented objective recommendations by taking an overall view of the client's business when developing plans and setting KPIs, based on case studies from other companies and EY's knowledge and insight into medical department operations.</p> <p><b>Supporting planning that ensures feasibility</b> Held repeated discussions with stakeholders to clarify each function and the roles and responsibilities of those in charge while forming a common understanding within the company regarding the mission of the department.</p>

## Medical

### Support for strategic planning and execution of data platform in Medical Affairs department

Support for the formulation of strategies for the use of medical data

Client Challenge	Our Role	Our Value Added
<p><b>Boost presence regarding regional healthcare professionals and municipalities</b> The client was looking for ways to collaborate with municipalities and regional academia to create long-term corporate value and services in the region and boost brand recognition. As the Medical Affairs department, an objective approach detached from product strategy was required.</p> <p><b>Create guidelines for the use of medical data</b> Regional healthcare strategies based on medical data were under discussion but strategies for the use of data had yet to be established. The client was also seeking expertise in building connections with stakeholders involved in regional healthcare, and in the future roll-out of solutions utilizing medical data to the regional community.</p>	<p><b>Plan strategies and create roadmap</b> Via surveys of the business environment regarding regional healthcare and the use of medical data, and interviews with relevant stakeholders, examined hypotheses for medical affairs initiatives and the direction of future measures. Drafted future strategies and roadmap which included specific ways to collaborate with regional communities.</p> <p><b>Build collaborative relationships with regional stakeholders</b> Leveraging EY relationships, gathered "frank opinions" from stakeholders such as municipalities and organizations connected with central government agencies. Based on regional healthcare needs, established a committee structure and project coordination scheme involving stakeholders.</p>	<p><b>Establishment of analytical model and scheme leading to evidence generation</b> Leveraging EY capabilities, supported analysis to generate evidence. Implemented an effective analytical approach that went beyond mere strategy formulation by conducting analyses based on academic knowledge by specialists in AI-related fields.</p> <p><b>Got leading stakeholders in regional healthcare involved</b> Built relationships with diverse stakeholders such as regional municipalities, academia and public organization based on EY relationships. Generated momentum for measures by creating a system that involved parties which have a say in regional healthcare policies and the ability to get things done.</p>

## Sales and Marketing

### Design go-to-market model in rare disease area

Develop new drug launch strategy

Client Challenge	Our Role	Our Value Added
<p><b>Develop strategy based on challenges particular to the rare disease area</b> When moving into the rare disease area, the client needed to formulate go-to-market strategy based on particular challenges of the area and customer needs.</p> <p><b>Optimize sales resources</b> Needed to formulate sales strategies and design a sales system efficiently in order to respond to dramatic transformations in the external environment surrounding pharmaceutical companies, such as the COVID-19 pandemic and government measures to rein in medical costs.</p>	<p><b>Identify challenges in the rare disease area</b> Identified the particular challenges and customer needs of the rare disease area by interviewing internal and external experts, and explored actions to resolve those issues.</p> <p><b>Organize activities required to launch a product, and formulate action plan</b> Ran workshop involving stakeholders in the departments involved, discussed market launch activities in order of priority. Incorporated each activity into the action plan and created a work breakdown structure (WBS).</p> <p><b>Design organizational structure</b> Designed organizational structure to implement required actions. While designing it, explored how to optimize sales resources using digital technology.</p>	<p><b>Clarified required actions up to the market launch</b> Successfully clarified essential actions, R&amp;R and schedules when entering the rare disease area. Fostered shared awareness by involving stakeholders laterally across departments.</p> <p><b>Shaped sales system for new drugs</b> Shaped the to-be form of the sales system to launch new drugs on the market. Optimized sales resources by using digital technology and prioritizing actions.</p>



## Sales and Marketing

### Support for developing vaccine launch strategy

Strategy development to enter new market

Client Challenge	Our Role	Our Value Added
<p><b>Entry into uncertain vaccine market</b> The client needed to define a go-to-market approach for an uncertain market driven by prevalence of an infectious disease and government policies.</p> <p><b>Determining headcount for vaccine supply</b> The company needed to calculate the headcount and talent needed for stable product supply in uncertain vaccine market.</p> <p><b>Supply chain design</b> In terms of stable vaccine supply, the client had to reexamine the entire supply chain, to clarify ongoing issues and to define the direction of operational improvements.</p>	<p><b>Analyzing vaccine market and develop launch strategy</b> Conducted research on business environment with domestic and international case studies and expert interviews. Created and organized the launch strategies and the specific action plans.</p> <p><b>Developing commercial model for sales resource</b> Based on market research and qualitative research with physicians, conducted segment analysis of medical institutions responsible for vaccination and designed the logic behind calculation of the number of targeted institutions. Supported development of the model to calculate the required headcount for medical representatives.</p> <p><b>Identifying and resolving supply chain issues</b> Organized the entire supply chain by considering vaccine approval to delivery of vaccination. Identified business functions to be performed as a pharmaceutical manufacturer and analyzed gaps between the current state.</p>	<p><b>Developed launch plan from professional insights</b> Developed launch strategy based on deep understanding of vaccine business. Leveraged EY global network and knowledge and insight of overseas project experts and infectious disease specialists.</p> <p><b>Building a roadmaps incorporating uncertainties</b> Defined the ideal supply chain, assuming multiple scenarios for the period of time and demand until the end of the pandemic. A roadmap was created based on the identified issues and characteristics of the uncertain vaccine business.</p>

## Technology

### Support to optimize call centers by introducing chatbots

Increased work efficiency leveraging digital tools

Client Challenge	Our Role	Our Value Added
<p><b>Streamlining back-office work</b> Call centers for patients and healthcare professionals were flooded with inquiries. The client needed to reduce outsourcing costs and eliminate inefficient manual procedures.</p> <p><b>Selecting digital solutions and establishing know-how</b> The client had a strong tendency to depend on their vendors with current business relationship, and needed to clarify the selection method for new digital solutions and assessment criteria for new vendors.</p> <p><b>Developing internal DX talent</b> Employees did not possess sufficient DX knowledge and practical experience and were not able to lead DX that requires autonomy and creativity.</p>	<p><b>Analyzing current business and identifying issues</b> Interview project related departments, visualized current work, identified issues, and constructed hypothesis for how digital solutions could optimize current work and created workflows.</p> <p><b>Developing assessment criteria for DX adoption</b> Clarified procedures for RFP development, the assessment criteria and process for vendor solutions, and supported development of evaluation format when adopting DX in the company.</p>	<p><b>Creating DX learning content</b> By creating introductory internal learning materials regarding DX, and holding workshops, supported employees to acquire knowledges to move forward DX in the company.</p> <p><b>Visualization of work based on actual needs</b> Considered solutions based on disease areas and patient characteristics, analyzed work in detail by interviewing people involved, reorganized current and future workflow based on actual operations on the ground and on the needs of people in charge of issue identification.</p> <p><b>Establishment of highly reproducible DX</b> Clearly specified the assessment criteria and the considered procedure for vendor solutions as well as communication method among parties involved to establish vendor selection criteria usable by different departments.</p>

## Technology

### Support for IT operation integration in corporate mergers and acquisitions

IT operational performance improvement

Client Challenge	Our Role	Our Value Added
<p><b>Knowledge of business integration</b> The client was planning operational integration and needed to take an inventory of IT systems, then determine and implement the integration policy and timing for each IT system in addition to appointing personnel to take charge. This required specialists with the knowledge and experience to achieve smooth business integration.</p> <p><b>Collaboration with various stakeholders</b> Integration work required management of employees working in multiple locations, including overseas, and vendors from more than ten companies and it was imperative that the global project proceed without delay.</p>	<p><b>Support for planning and implementation of operational integration</b> Carried out work required for integration, from setting the scope to assigning personnel and identifying tasks in detail, developed an integration plan and supported consensus-building with the global head office.</p> <p><b>Support IT infrastructure integration</b> Carried out process management of the work required for integration, such as the actual switching of infrastructure. Supported the identification of possible issues and risks in advance in order to allow work to proceed without delay during implementation.</p> <p><b>Global stakeholder management</b> Provided timely and appropriate information to stakeholders at the global head office and supported rapid decision-making at the global head office level.</p>	<p><b>Smooth implementation of global projects</b> Carried out timely and precise communication with personnel involved in the project both within the country and overseas and implemented the project so that language and working environment did not cause interference, based on EY's global project implementation methodology.</p> <p><b>Proposals from experts in post merger integration (PMI)</b> Made recommendations based on best practices when developing the integration plan and supported implementation based on EY's knowledge and insight into domestic and overseas PMI. Streamlined business operations with a view to the future after integration.</p>

# EY Life Sciences Differentiators

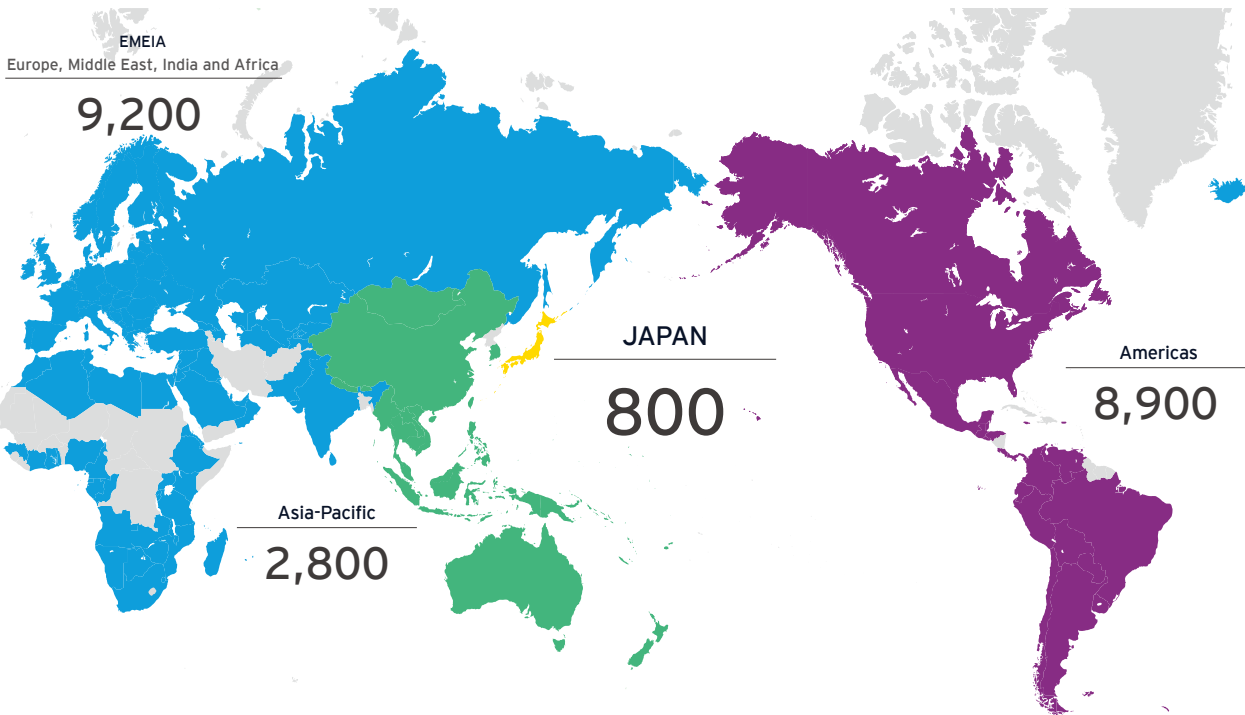
## Full service support offered with our 4 service lines

EY is primarily made up of the 4 core service lines: Consulting, Strategy and Transactions, Tax and Assurance. EY Life Sciences experts provide comprehensive support on client issues through close collaboration between the 4 service lines in Japan and overseas.



## Our Life Sciences Sector professionals network: over 800 in Japan and 21,000 globally

EY has a network of more than 21,000 professionals in the life sciences and healthcare industries worldwide. Through cross-border teaming and two-way sharing of knowledge, we provide optimum solutions matched to the project's challenges. In Japan, approximately 800 life sciences and healthcare industry professionals provide a full line of services to support problem solving for complex and diversified life science companies.





# Providing Information for the Life Sciences Industry

In addition to inviting experts from inside and outside the industry to hold seminars and symposiums that provide an insight into the latest trends, EY Life Sciences provides opportunities for discussions at the CxO level regarding how to conduct business in a rapidly changing market environment. Through these activities, the EY Group as a whole supports the entire life sciences industry, including medical care, pharmaceuticals, medical equipment, and wholesalers.

## Symposiums



Large-scale symposiums are held on a regular basis. A wide range of people involved in the life sciences industry are invited, providing an opportunity to describe the latest domestic and international trends in the industry and new regulations and systems. In addition to industry consultants, leading experts and specialists on various fields and issues are invited to share the latest information and insights and support you in promoting your business.

Topics covered:

- ▶ The latest trends in the shift to digital and case studies of applications in the life sciences industry
- ▶ Use of digital technology in global life sciences companies
- ▶ Next Wave Wellness: New trends for health promotion and in the industry
- ▶ ACCJ Healthcare X Digital 2022

## Executive Roundtables



The number of companies with new business models based on digital health and data utilization is increasing in the life sciences industry. These roundtables are held as an opportunity to invite executives from various companies to discuss the impact of this business environment on the present and future of the life sciences industry.

Topics covered:

- ▶ What can we learn from the global digital trends to accelerate the business growth in Japan?
- ▶ The latest trends in systemic reforms to promote digital health in Japan
- ▶ EY Life Sciences Executive Webcast - Firepower Report

## Seminars



A number of changes are affecting the business environment of life sciences companies, from the emergence of advanced technologies such as AI, robotics and blockchain, to evolving industry regulations and new entrants into the market from different industries. These seminars provide an opportunity to explore the latest information and trends relating to various specialized topics in order to enable people in charge of these areas to deepen their understanding of the impact of these changes on their company's business.

Topics covered:

- ▶ Healthtech/SUM 2022 Connect into a Spiral - Patient Centric Technology Integration -
- ▶ The evolution of life sciences businesses in ASEAN countries
- ▶ Learning from the forefront of digital strategies of life science companies in the US and Europe
- ▶ The mission of the life sciences industry in super-aged societies
- ▶ The latest trends and strategies in the shift to digital in Southeast Asia

# Our Team

## Life Sciences Sector Consultants



### Tetsuro Sano

Partner  
+81 70 3853 5548  
tetsuro.sano@jp.ey.com

Tetsuro Sano has extensive management consulting experiences for domestic and global life sciences companies. The range of his consulting expertise encompasses the complete value chain - from R&D to the supply chain and commercial domain.

With digital transformation in the life sciences industry moving forward, he has held a variety of seminars and speeches on life sciences and digitalization directed at companies and groups in this industry segment. Tetsuro is the Life Sciences Sector Consulting Leader for EY Japan.



### Christian Boettcher

Partner  
+81 70 8794 4741  
christian.boettcher@jp.ey.com

Christian has 20+ years experience in consulting and transaction advisory, focusing on supporting multi-national Pharmaceutical & MedTech organizations with their APAC and Japan operations. He has extensive experience in market entry strategy, growth strategy, M&A strategy, operating model assessment & design, product launch support, market access, cost optimization, Dx and cost optimization.



### Takashi Matsumoto

Partner  
+81 70 7771 1520  
takashi.matsumoto@jp.ey.com

Takashi Matsumoto has extensive consulting experience in the life sciences industry, including in relation to strategic planning, globalization, operational reform, organizational design, outsourcing, change management, inspections and digital transformation. In particular, he has a strong track record of numerous global projects in the fields of PV, MA, QA and R&D. He is also engaged in Thought Leadership through activities such as a range of benchmarking surveys.



### Takeshi Shimizu

Partner  
+81 70 8803 2823  
takeshi.shimizu2@jp.ey.com

Takeshi Shimizu has around 20 years of experience in consulting and business management field. Prior to joining EY, he had overall responsibility for management consulting and other businesses at a global healthcare solutions company. Accordingly, he has experience of business and organizational management, solution development and implementing M&A as a strategic buyer. In recent years, he has focused mainly on the health care and life sciences sectors, where he has delivered a wide range of projects related to various subjects such as asset/product strategy, go-to-market, portfolios, M&A/LA, and organizational strategy transformation. Since 2018, in particular, he has been involved in many digital health projects in Japan.



### Yusuke Murakami

Partner  
+81 90 1911 9495  
yusuke.murakami@jp.ey.com

Yusuke Murakami has experience in formulating a wide range of management strategies in life sciences and healthcare industry, including corporate strategies, business strategies, product strategies and new business strategies. He leverages his specialist knowledge and experience to provide stakeholders in the life sciences and healthcare industry with various recommendations. He has extensive experience in the medical device industry, including leading strategy and business development departments and supervising business department marketing. Most recently, he has been involved in launching business as the Japan country manager. In the life sciences sector, he is the med-tech and medical devices leader.



### Yuki Okamatsu

Associate Partner  
+81 90 3439 7817  
yuki.okamatsu@jp.ey.com

Yuki Okamatsu has over 17 years of experience as a consultant for pharmaceutical companies, with a particular focus on multi-national companies. Her special areas of expertise are growth strategy, digital transformation, sales organizational reform, and cost optimization.



## Subject Matter Experts



Customer Experience Transformation  
**Tsukasa Yoshimoto**  
Partner  
+81 80 5965 5881  
tsukasa.yoshimoto@jp.ey.com



Strategy  
**Hiroshi Nakamura**  
Partner  
+81 70 7607 3626  
hiroshi.nakamura@jp.ey.com



Customer Experience Transformation  
**Kazunori Kan**  
Director  
+81 70 4552 9953  
kazunori.kan@jp.ey.com



Strategic Impact  
**Toshifumi Kokubun**  
Partner  
+81 70 7512 5599  
toshifumi.kokubun@jp.ey.com



Technology  
**Osamu Shinsakaue**  
Partner  
+81 70 2495 5882  
osamu.shinsakaue@jp.ey.com



Supply Chain & Operations  
**Kenji Hirai**  
Partner  
+81 80 9367 9991  
kenji.hirai@jp.ey.com



Finance  
**Masashi Tanaka**  
Partner  
+81 70 7606 3217  
masashi.tanaka3@jp.ey.com



People Advisory Services  
**Akinori Mizuno**  
Partner  
+81 70 7789 8669  
akinori.mizuno@jp.ey.com



Cybersecurity  
**Naoshi Matsushita**  
Partner  
+81 70 7487 7241  
naoshi.matsushita@jp.ey.com



Data Science  
**Gen Kobayashi**  
Associate Partner  
+81 70 7539 8805  
gen.kobayashi@jp.ey.com



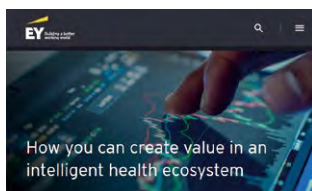
Strategy  
**Manabu Shinohara**  
Partner  
+81 70 7771 1526  
manabu.shinohara3@jp.ey.com



Enterprise Risk  
**Yusuke Koyama**  
Partner  
+81 70 7411 3060  
yusuke.koyama2@jp.ey.com

# Life Sciences

## Thought Leadership Publications



### The Intelligent Health Ecosystem

How you can create value in an intelligent health ecosystem

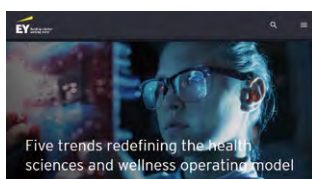
[https://www.ey.com/en\\_gl/life-sciences/how-you-can-create-value-in-an-intelligent-health-ecosystem](https://www.ey.com/en_gl/life-sciences/how-you-can-create-value-in-an-intelligent-health-ecosystem)



### Pulse of the industry

Medical technology report 2022

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### Five trends redefining the health sciences and wellness operating model

[https://www.ey.com/en\\_gl/life-sciences/five-trends-health-sciences-wellness-operating-model](https://www.ey.com/en_gl/life-sciences/five-trends-health-sciences-wellness-operating-model)



### How ecosystem participation drives more value for life sciences deals

2022 EY M&A Firepower report


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### Pharma Supply Chains of the Future

[https://www.ey.com/en\\_gl/life-sciences/how-can-greater-localization-increase-supply-chain-resilience](https://www.ey.com/en_gl/life-sciences/how-can-greater-localization-increase-supply-chain-resilience)



A close-up photograph of a human hand in a grey suit sleeve shaking a white robotic hand. The background is a blurred office setting. A yellow geometric frame is in the top left, and the EY logo is in the bottom right.

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Representatives	Akira Kondo, Representative Director and President Hidekazu Umemura, Representative Director Peter Wesp, Representative Director Masami Koike, Representative Director
Offices	<div>Tokyo Midtown Hibiya, Hibiya Mitsui Tower, 1-1-2 Yurakucho, Chiyoda-ku, Tokyo 100-0006 Tel: 03 3503 3500 (main)</div> <div>Osaka Osaka Umeda Twin Towers North, 8-1 Kakuda-cho, Kita-ku, Osaka-shi, Osaka 530-0017 Tel: 06 6940 0190 (main)</div> <div>Fukuoka Tenjin Bldg., 2-12-1 Tenjin, Chuo-ku, Fukuoka-shi, Fukuoka, 810-0001 Tel: 092 781 9500 (main)</div>
Date of Establishment	October 1, 2020
Paid-in Capital	450 million yen
Number of Employees	3,574 (as of March 2023)