Accenture Life Sciences

RETHINK RESHAPE RESTRUCTURE... FOR BETTER PATIENT OUTCOMES

PRACTICE OVERVIEW

BRAVE NEW ERA
The life sciences industry is experiencing an unprecedented confluence of socio-economic, scientific and technological change. In addition to more systematic collaboration among healthcare professionals, patients, payers and governments, we see scientific and technological advancements driving a profound transition from being product-centric to patient and health economic outcomes-centric. This transition is further fueled by new incentives for reimbursement, specialized therapeutics... and by consumer-oriented patients themselves.

**HELPING COMPANIES:**

**RETHINK** the role their organizations play in a broadly defined industry that is reassessing how it creates and rewards value, and even what “value” means.

**RESHAPE** business models, capabilities, operations, strategy and culture to drive future growth and performance.

**RESTRUCTURE** commercial, R&D and supply chain to be value-led and patient-centric, embracing change at strategic, operational, organizational, talent and technological levels.

**PATIENTS NEED THEM, GOVERNMENTS AND PAYERS ARE DEMANDING THEM AND LIFE SCIENCES COMPANIES ARE ESSENTIAL IN DEVELOPING AND DELIVERING THEM.**

**BETTER OUTCOMES**
At this catalytic moment, life sciences leaders must be value innovators that are brave enough to accelerate investments in digital technologies, restructure their operating models, embrace analytic-driven insights, rethink partnerships and put improved patient and economic outcomes at the front and center of their business models and cultures.

Accenture has also embarked on a new era building our capabilities across our five business areas. Our 15,000+ life sciences practitioners are dedicated to helping our clients successfully navigate this new healthcare ecosystem and build performance and value-focused business and operating models that deliver better outcomes and drive shareholder value.
IN R&D

• Built and operate the most advanced R&D cloud-based platform—the Accenture Life Sciences Cloud for R&D
• Created the Life Sciences Cloud Coalition—industry leaders who are shaping the future of R&D
• Leveraging cloud, mobility, and analytics to deliver integrated solutions across R&D
• Working with clients to speed R&D by up to 15 percent and lower costs by up to 30 percent

IN TECHNOLOGY

• Pioneered an unprecedented collaboration with SAP on SAP Business Suite 4 SAP HANA (SAP S/4HANA), the next-generation business suite built on the industry’s most advanced in-memory platform
• Reduced IT application costs as much as 60 percent in a three year period while improving quality
• Built the largest and most diversified group of strategy, digital, technology and operations professionals in the world

LEADING THE WAY
IN PATIENT SERVICES

- Built and operate the most advanced patient technology platform—the **Accenture Intelligent Patient Platform**
- Apply **Predictive Health Intelligence**—a set of analytics solutions to determine the precise combination of treatments and services that can lead to better patient, provider and economic outcomes
- Pioneered a leading patient care solution with **Boston Scientific** for chronic heart failure patients
- Leader in patient-based research on patient support needs

IN COMMERCIAL

- Delivering **Intelligent Commercial Solutions** with clients in more than 25 countries spanning 5 continents
- Digitally-enabled more than 50 brands
- Improved brand performance by 2–5 percent for more than 140 brands globally
- Delivered 15–30 percent in cost savings at 6 of the top 10 pharma companies
- Helped improve patient care for more than 20,000 patients

IN SUPPLY CHAIN

- Operate the **Accenture Supply Chain Academy**—the largest, most comprehensive course library available from any learning provider
- Helped a leading global pharmaceutical company reduce costs by nearly 9 percent with a global transportation control tower
- Created an unprecedented next generation Supply Chain X.0 planning framework
- Supply Chain Centers of Excellence providing industry expertise and innovation to deliver solutions and solve critical supply chain issues
15,000+ life sciences professionals in 50+ countries

ALL of the top 10 global biopharmaceutical companies

9 of the top 10 medical technology companies

ALL of the top 8 largest biotech companies

ALL of the top 10 global pharma markets

7 Life Sciences Centers of Excellence across the globe

3 Life Sciences Innovation Centers (Dublin, Murray Hill, Sophia Antipolis)

250+ medical professionals

21+ years of business process outsourcing experience

Deep expertise in 9 of the top 10 therapeutic areas

Helping 95% of Fortune 500 life sciences companies deliver improved outcomes for more than two decades

SERVING CLIENTS IN:

Pharmaceuticals
Biotechnology
Medical Technology & Devices
Global Health Authorities
Generics
Health Start-ups
Wholesalers/Distributors
Service Providers

UNEQUALED AROUND THE WORLD
Deep expertise in 9 of the top 10 therapeutic areas

SERVING CLIENTS IN:

We are pleased to team with Accenture to leverage SAP S/4HANA capabilities to provide global financial visibility as we reach new customers, drive growth and integrate acquired businesses.

| Paul W. Hoelscher, Executive Vice President, Chief Financial Officer, Horizon Pharma

Accenture is an important collaborator with TransCelerate. Accenture’s deep expertise in life sciences, technology, and clinical data-related services will be instrumental in delivering a data sharing solution.

| Dalvir Gill, Chief Executive Officer, TransCelerate Biopharma, after Accenture was selected to support TransCelerate in the first cross-therapeutic, multi-sponsor clinical data sharing initiative of its kind in life sciences.

Boston Scientific and Accenture designed this digital health platform to help providers standardize care, reduce overall length of stay and lower admission rates. The Care Pathway Transformation program is designed to enable healthcare professionals and patients to have more informed relationships, leading to better health outcomes and lower costs for health systems. Together, we are addressing an acute industry need for some of the most costly chronic conditions.

| Mike Mahoney, President and Chief Executive Officer, Boston Scientific

A RECOGNIZED LEADER IN THE LIFE SCIENCES INDUSTRY

<table>
<thead>
<tr>
<th>TOP IT SERVICES VENDOR</th>
<th>EUROPEAN LEADER</th>
<th>DIGITAL AND COMMERCIAL LEADER</th>
<th>R&amp;D LEADER</th>
<th>WINNER’S CIRCLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ranked as Top IT Services Vendor in the Life Science Industry for five years in a row by IDC Health Insights</td>
<td>Leader position on Everest Group’s PEAK Matrix for European Life Sciences ITO</td>
<td>Leader in all four IDC MarketScape Worldwide Life Science Sales and Marketing reports and in Everest Group’s Peak Matrix for Life Sciences Digital. Ranked by Ad Age as the Largest Digital Network Agency in the world</td>
<td>Leader in all four IDC MarketScape Worldwide Life Science R&amp;D reports and in Everest Group’s PEAK Matrix for Life Sciences Clinical and R&amp;D IT Services</td>
<td>As-a-Service Winner’s Circle for Pharma BPO R&amp;D and Commercial Services by HFS Research</td>
</tr>
</tbody>
</table>
IMPROVING CLIENT OUTCOMES

Accenture worked with a leading global pharma company to customize Salesforce Service Cloud to its precise need enabling its call center in Brazil to enroll and support nearly four million patients 20% faster while lowering its operating costs by 25%.

Accenture keeps a medical technology company’s business-critical internet technology running smoothly and securely to support $6 billion worth of its commercial transactions annually.

Accenture is working with Boston Scientific to provide an analytics-driven digital health solution to help improve patient outcomes and reduce the cost of treating chronic cardiovascular conditions. This solution is powered by the Accenture Intelligent Patient Platform.

Accenture worked with a top-five pharmaceutical company to develop a revolutionary clinical data aggregation and exchange platform to accelerate the clinical development process.

Accenture helped a leading global pharmaceutical company create an integrated global transportation management strategy doubling its cost savings and increasing operational control enabling the company to distribute its products globally with greater speed, consistency, responsiveness, and security.

Accenture worked with a large European-based pharmaceutical company to transform its IT systems, transitioning 118 applications across R&D, supply network and sales and marketing in just four months and reducing IT application costs as much as 60 percent while improving quality.

OUR CLIENTS INCLUDE
Abbott
Astellas
AstraZeneca
Baxter
Bayer
Becton Dickenson
Biogen
Boston Scientific
Cardinal Health
Gilead
GlaxoSmithKline
Horizon Pharma
McKesson
Merck & Co
Merck Serono
Novartis
Pfizer
Roche
Sanofi
Stryker
Takeda Pharmaceuticals
Teva
UCB
Vertex

OUR CLIENTS INCLUDE
Abbott
Astellas
AstraZeneca
Baxter
Bayer
Becton Dickenson
Biogen
Boston Scientific
Cardinal Health
Gilead
GlaxoSmithKline
Horizon Pharma
McKesson
Merck & Co
Merck Serono
Novartis
Pfizer
Roche
Sanofi
Stryker
Takeda Pharmaceuticals
Teva
UCB
Vertex

OUR CLIENTS INCLUDE
Abbott
Astellas
AstraZeneca
Baxter
Bayer
Becton Dickenson
Biogen
Boston Scientific
Cardinal Health
Gilead
GlaxoSmithKline
Horizon Pharma
McKesson
Merck & Co
Merck Serono
Novartis
Pfizer
Roche
Sanofi
Stryker
Takeda Pharmaceuticals
Teva
UCB
Vertex

OUR CLIENTS INCLUDE
Abbott
Astellas
AstraZeneca
Baxter
Bayer
Becton Dickenson
Biogen
Boston Scientific
Cardinal Health
Gilead
GlaxoSmithKline
Horizon Pharma
McKesson
Merck & Co
Merck Serono
Novartis
Pfizer
Roche
Sanofi
Stryker
Takeda Pharmaceuticals
Teva
UCB
Vertex

OUR CLIENTS INCLUDE
Abbott
Astellas
AstraZeneca
Baxter
Bayer
Becton Dickenson
Biogen
Boston Scientific
Cardinal Health
Gilead
GlaxoSmithKline
Horizon Pharma
McKesson
Merck & Co
Merck Serono
Novartis
Pfizer
Roche
Sanofi
Stryker
Takeda Pharmaceuticals
Teva
UCB
Vertex

OUR CLIENTS INCLUDE
Abbott
Astellas
AstraZeneca
Baxter
Bayer
Becton Dickenson
Biogen
Boston Scientific
Cardinal Health
Gilead
GlaxoSmithKline
Horizon Pharma
McKesson
Merck & Co
Merck Serono
Novartis
Pfizer
Roche
Sanofi
Stryker
Takeda Pharmaceuticals
Teva
UCB
Vertex

OUR CLIENTS INCLUDE
Abbott
Astellas
AstraZeneca
Baxter
Bayer
Becton Dickenson
Biogen
Boston Scientific
Cardinal Health
Gilead
GlaxoSmithKline
Horizon Pharma
McKesson
Merck & Co
Merck Serono
Novartis
Pfizer
Roche
Sanofi
Stryker
Takeda Pharmaceuticals
Teva
UCB
Vertex

OUR CLIENTS INCLUDE
Abbott
Astellas
AstraZeneca
Baxter
Bayer
Becton Dickenson
Biogen
Boston Scientific
Cardinal Health
Gilead
GlaxoSmithKline
Horizon Pharma
McKesson
Merck & Co
Merck Serono
Novartis
Pfizer
Roche
Sanofi
Stryker
Takeda Pharmaceuticals
Teva
UCB
Vertex

OUR CLIENTS INCLUDE
Abbott
Astellas
AstraZeneca
Baxter
Bayer
Becton Dickenson
Biogen
Boston Scientific
Cardinal Health
Gilead
GlaxoSmithKline
Horizon Pharma
McKesson
Merck & Co
Merck Serono
Novartis
Pfizer
Roche
Sanofi
Stryker
Takeda Pharmaceuticals
Teva
UCB
Vertex

OUR CLIENTS INCLUDE
Abbott
Astellas
AstraZeneca
Baxter
Bayer
Becton Dickenson
Biogen
Boston Scientific
Cardinal Health
Gilead
GlaxoSmithKline
Horizon Pharma
McKesson
Merck & Co
Merck Serono
Novartis
Pfizer
Roche
Sanofi
Stryker
Takeda Pharmaceuticals
Teva
UCB
Vertex

OUR CLIENTS INCLUDE
Abbott
Astellas
AstraZeneca
Baxter
Bayer
Becton Dickenson
Biogen
Boston Scientific
Cardinal Health
Gilead
GlaxoSmithKline
Horizon Pharma
McKesson
Merck & Co
Merck Serono
Novartis
Pfizer
Roche
Sanofi
Stryker
Takeda Pharmaceuticals
Teva
UCB
Vertex

OUR CLIENTS INCLUDE
Abbott
Astellas
AstraZeneca
Baxter
Bayer
Becton Dickenson
Biogen
Boston Scientific
Cardinal Health
Gilead
GlaxoSmithKline
Horizon Pharma
McKesson
Merck & Co
Merck Serono
Novartis
Pfizer
Roche
Sanofi
Stryker
Takeda Pharmaceuticals
Teva
UCB
Vertex

OUR CLIENTS INCLUDE
Abbott
Astellas
AstraZeneca
Baxter
Bayer
Becton Dickenson
Biogen
Boston Scientific
Cardinal Health
Gilead
GlaxoSmithKline
Horizon Pharma
McKesson
Merck & Co
Merck Serono
Novartis
Pfizer
Roche
Sanofi
Stryker
Takeda Pharmaceuticals
Teva
UCB
Vertex

OUR CLIENTS INCLUDE
Abbott
Astellas
AstraZeneca
Baxter
Bayer
Becton Dickenson
Biogen
Boston Scientific
Cardinal Health
Gilead
GlaxoSmithKline
Horizon Pharma
McKesson
Merck & Co
Merck Serono
Novartis
Pfizer
Roche
Sanofi
Stryker
Takeda Pharmaceuticals
Teva
UCB
Vertex

OUR CLIENTS INCLUDE
Abbott
Astellas
AstraZeneca
Baxter
Bayer
Becton Dickenson
Biogen
Boston Scientific
Cardinal Health
Gilead
GlaxoSmithKline
Horizon Pharma
McKesson
Merck & Co
Merck Serono
Novartis
Pfizer
Roche
Sanofi
Stryker
Takeda Pharmaceuticals
Teva
UCB
Vertex

OUR CLIENTS INCLUDE
Abbott
Astellas
AstraZeneca
Baxter
Bayer
Becton Dickenson
Biogen
Boston Scientific
Cardinal Health
Gilead
GlaxoSmithKline
Horizon Pharma
McKesson
Merck & Co
Merck Serono
Novartis
Pfizer
Roche
Sanofi
Stryker
Takeda Pharmaceuticals
Teva
UCB
Vertex

OUR CLIENTS INCLUDE
Abbott
Astellas
AstraZeneca
Baxter
Bayer
Becton Dickenson
Biogen
Boston Scientific
Cardinal Health
Gilead
GlaxoSmithKline
Horizon Pharma
McKesson
Merck & Co
Merck Serono
Novartis
Pfizer
Roche
Sanofi
Stryker
Takeda Pharmaceuticals
Teva
UCB
Vertex

OUR CLIENTS INCLUDE
Abbott
Astellas
AstraZeneca
Baxter
Bayer
Becton Dickenson
Biogen
Boston Scientific
Cardinal Health
Gilead
GlaxoSmithKline
Horizon Pharma
McKesson
Merck & Co
Merck Serono
Novartis
Pfizer
Roche
Sanofi
Stryker
Takeda Pharmaceuticals
Teva
UCB
Vertex
THE ACCENTURE GLOBAL DELIVERY AND INNOVATION NETWORK FOR LIFE SCIENCES

BERWYN, PA
- Accelerated R&D Services
- Intelligent Commercial Solutions

MURRAY HILL, NJ
- Life Sciences Innovation Center

PARSIPANncy, NJ
- Intelligent Commercial Solutions

LATIN AMERICA
- Intelligent Commercial Solutions
- Accenture Advanced Enterprise Solution (AAES)
- Compliance & Validation
- Enterprise Services

BRATISLAVA
- Enterprise Services
- Life Sciences Solution Factory

DUBLIN
- Life Sciences Innovation Center

LONDON
- Accelerated R&D Services

BASEL
- Life Sciences Center of Excellence

SOPHIA ANTIPOLIS
- Life Sciences Innovation Center

BARCELONA
- Distribution & Supply Chain Innovation Center—SAP and Oracle
- Life Sciences Center of Excellence

ROME
- Accenture Advanced Enterprise Solution (AAES)
- Compliance & Validation
- Enterprise Services

PRAGUE
- Accelerated R&D Services

WARSAW
- Intelligent Commercial Solutions
- Accelerated R&D Services

NCR
- Distribution & Supply Network
- Infrastructure Outsourcing

MUMBAI
- Accelerated R&D Services
- Intelligent Commercial Solutions
- Compliance & Validation
- Medical Distribution & Supply Chain Technology

PUNE
- Accelerated R&D Services
- Compliance & Validation
- Enterprise Infrastructure Outsourcing Services
- Life Sciences Solution Factory
- Life Sciences Center of Excellence—Testing
- Microsoft Hub

BANGALORE
- Accelerated R&D Services
- Intelligent Commercial Solutions
- Compliance & Validation
- Enterprise Services
- Life Sciences Solution Factory
- Life Sciences Center of Excellence—Cloud
- Innovation Infrastructure Outsourcing Center—SAP and Oracle

CHENNAI
- Accelerated R&D Services
- Intelligent Commercial Solutions
- Compliance & Validation
- Life Sciences Center of Excellence

KOLKATA
- Intelligent Commercial Solutions
- Enterprise Services
- Infrastructure Outsourcing
SHANGHAI
- Accelerated R&D Services
- Intelligent Commercial Solutions
- Life Sciences Center of Excellence
- Medical Technology

DALIAN
- Accelerated R&D Services
- Intelligent Commercial Solutions
- Compliance & Validation
- Life Sciences Solution Factory
- Life Sciences Center of Excellence

MANILA
- Accelerated R&D Services
- Intelligent Commercial Solutions
- Accenture Advanced Enterprise Solution (AAES)
- Compliance & Validation
- Enterprise Services
- Life Sciences Solution Factory
- Life Sciences Center of Excellence

TOKYO
- Accelerated R&D Services
ABOUT LIFE SCIENCES

Accenture's Life Sciences group is dedicated to helping companies rethink, reshape or restructure their businesses to deliver better patient outcomes and drive shareholder returns. We provide end-to-end capabilities within or across strategy, consulting, digital, technology and operations around the globe in all strategic and functional areas—with a strong focus on R&D, Patient Services, Commercial and the Supply Chain.

We have decades of experience working hand-in-hand with our clients to improve their performance across the entire life sciences value chain. Accenture's Life Sciences group connects more than 15,000 skilled professionals in over 50 countries who are personally committed to helping our clients achieve their business objectives and deliver better health outcomes for people around the world.

ABOUT ACCENTURE

Accenture is a leading global professional services company, providing a broad range of services and solutions in strategy, consulting, digital, technology and operations. Combining unmatched experience and specialized skills across more than 40 industries and all business functions—underpinned by the world's largest delivery network—Accenture works at the intersection of business and technology to help clients improve their performance and create sustainable value for their stakeholders. With more than 394,000 people serving clients in more than 120 countries, Accenture drives innovation to improve the way the world works and lives. Visit us at www.accenture.com.