



WORKFORCE OF THE FUTURE

IN INDIAN PHARMA INDUSTRY



FOREWORD

Rapid digital transformation, an evolving regulatory landscape and the rising wave of consumerism continue to play a pivotal role in shaping the future of the pharmaceutical industry. The implications of these demographic and technology trends on the workforce are profound. Today's pharma workforce needs to radically change to create different careers, mindsets, skills and expectations. The pharma leaders of tomorrow require new skills and flexibility to respond to these changes and lead effectively.

What does it take to build the workforce of the future? What will be the key drivers of performance and productivity?

The Organisation of Pharmaceutical Producers in India (OPPI), along with Accenture, put together this thought leadership report that captures the key talent themes and proactive strategies pharma companies need to be mindful of to prepare for the future, today. The report presents a perspective on the factors shaping the future of the pharma industry in India, identifies essential skills that pharma companies must integrate into their workforce, and illuminates potential strategies that can help these companies plan and build the workforce of the future.

We would like to sincerely thank all industry participants who contributed to the report. Their ideas and insights have ensured that the focus remains on the most relevant themes.

We realize that creating a workforce that can enable future success will require a concerted, well-thought-out and sustained effort. We sincerely hope that the report will serve as a stimulus in furthering meaningful discussions for all our leaders focused in this endeavor.



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EXECUTIVE SUMMARY

The Indian pharma industry is undergoing unprecedented disruption, and it continues to evolve every day. There are a multitude of factors that will drive these changes.



SOCIO-ECONOMIC DYNAMICS

The growth in per capita income is driving affordability, thus giving way to higher healthcare inclusion. Further, the number of lifestyle-related ailments will drive greater demand for specific chronic therapies. Engaging millennials, the largest demographic group in India, as the target customers, doctors and resource pool will be critical.



REGULATORY AND POLICY ACTION

Government focus and increased spending on healthcare will have a multiplier effect on the industry and create new opportunities for pharma companies. Regulatory and policy interventions concerning over-the-counter (OTC) products, the Uniform Code for Pharmaceutical Marketing Practices (UCPMP) and e-pharmacies are expected to materially impact the commercial dynamics in the domestic market.



DIGITAL DISRUPTION

Healthcare consumerization is shifting power to patients, who are aspiring to lead a healthier lifestyle by embracing technology. Further, healthcare and digital ecosystems are converging, with pharma companies investing heavily in digital technologies and sales tools to help their sales organizations improve overall effectiveness and optimize cost to serve. The use of advanced analytics will act as a differentiator by helping pharma companies drive efficiencies and productivity.

To retain and build their competitive advantage in a fast-changing market, pharma companies will need to respond to or lead the way in these three areas. These “forces” of disruption will impact the operating model of pharma companies at three different levels.



PORTFOLIO MIX

The market will see a shift from acute to chronic conditions (e.g., cardiac, anti-diabetic and derma), and this will drive the share of specialty drugs.. Moreover, innovator products will become more significant on the specialty side. Wellness (e.g., nutraceuticals, herbal and OTC segments) will emerge as significant contributors.



GO-TO-MARKET STRATEGIES

Pharma companies will need to build capabilities to ensure relevance with the existing channels, such as institutional sales, and leverage the evolution of newer channels such as e-pharmacies. Doctor engagement will increasingly become omni-channel, with companies focusing on tools beyond in-clinic detailing to reach the doctor. Greater use of technology in the rep-doctor channel engagement would make linking rep performance to actual sales outcomes possible.



PIVOT TO THE PATIENT

Pharma companies will increasingly leverage evolving digital health ecosystems to move from being pill providers to health solution partners for patients. As healthcare becomes an important policy agenda for the government, the need to treat more and more patients for less money would create demand for outcome-based measures.

To prepare themselves to respond to the changes in their business model, companies need to consider the impact those changes will have on the job mix, skills required and workforce mindset, and employee practices or value proposition. Through our discussions with industry leaders, we identified six distinct talent themes that broadly cover the skills pharma companies need to become future-ready. These include skills that are already present in the organization but need to be significantly adapted (evolutionary) as well as those that are currently nascent and need to be advanced (emerging).

THE TALENT THEMES



THE REP RENAISSANCE

The company representative's role is transforming into a "relationship" manager for the doctor—someone who helps the doctor provide better services to patients through better engagement, training, product availability and compliance. Digital tools will help augment the efforts of medical representatives. As the productivity of doctors increases, they will be able to spend more time engaging with channel partners and patients.



CONTENT TO CUSTOMER EXPERIENCE

Brand managers, who have traditionally focused on incrementally improving the content to be delivered to doctor, will now focus on enhancing the brand experience for doctors.



KEY ACCOUNT MANAGEMENT (KAM) 2.0

With the increasing rise of the institutional segment, certain new KAM skills will become critical—the ability to price strategically, and engage and influence the accounts to ensure empanelment.



BEYOND THE PILL

With the advent of modern digital technologies, the cost of engaging with patients is significantly decreasing, especially when it comes to chronic therapies such as asthma and diabetes. Patient engagement will emerge as an important function of the new commercial organization as companies look to differentiate themselves.



EMBEDDING DIGITAL THOUGHT

The real power of digital is unleashed only when it cuts across functions within the organization. To unleash the power of digital, pharma companies need to enable it to cut across functions and ensure digital initiatives are close-looped. As a native digital-pharma experience does not exist, companies will need to employ a hybrid approach—a digital center of excellence (CoE) and individual digital champions.



ANALYTICS AT THE CORE

Data, which will be key to enabling leaders and individual employees to make the best decisions at the optimal speed, will need to flow seamlessly across business models, functions and project teams, and centrally facilitated.

We went a step further and delved on these talent themes with a focus on what's new, the skills required to fill the gaps and how organizations can imbed new skills.

While these are just broad categorizations of the key skills the industry needs to focus on, what is clear is the new leadership imperative: Create the future workforce, Now!

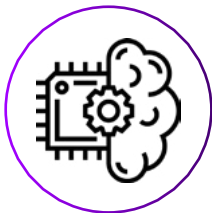
The good news? Many leaders are already acting on these imperatives. The bad news? The clock is ticking, and it is ticking fast.

Through our interactions with pharma industry leaders, we identified the top three immediate actions needed by leaders to shape and prepare this future workforce. Companies need to:



Reimagine the future organization

As pharma companies respond to a continuously shifting industry landscape, they need to challenge the assumptions on which their operating model is constructed.



Accelerate the reskilling of people

Reskilling will be central to the industry's workforce agenda if they want to stay relevant and succeed.



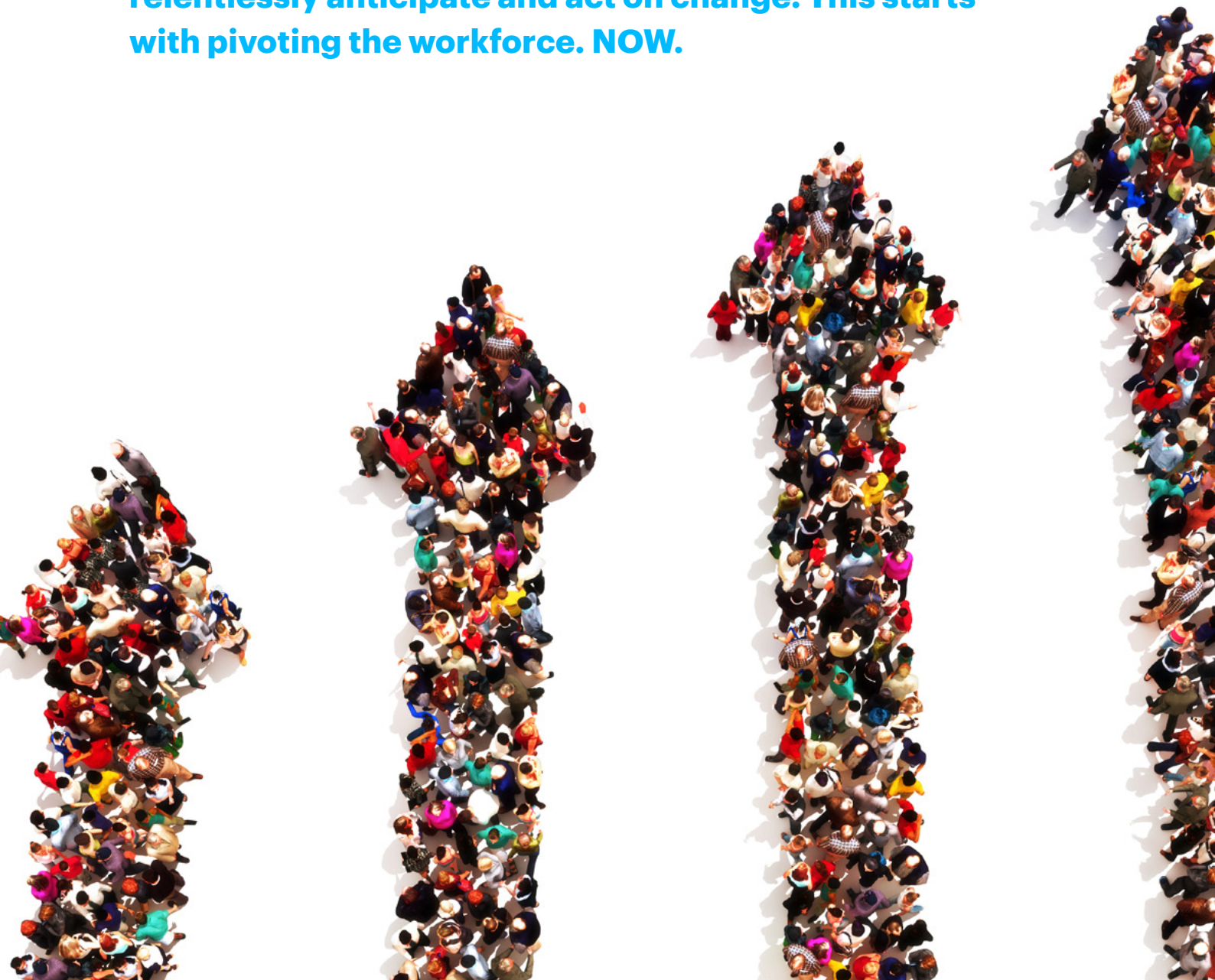
Strengthen the talent pipeline

Pharma companies in India need to look for talent beyond the pharma industry, leverage global capabilities and collaborate with academia.

Many leaders are already creating focused strategies around these imperatives, but how fast they are able to execute their strategies will make all the difference. For responsive and responsible leaders, the need of the hour is to harness the power of these structural shifts for long-term advantage and shareholder value. Reshaping their organization will enable workers to flourish in a future augmented by new tools and technologies in a way that drives real business value—labor productivity, talent acquisition and retention, and innovation and creativity.

To create a path to greater productivity and innovation via talent, organizations must take stock of change gaps, make every leader a digital leader, cultivate development and reskilling as currency, and become good stewards of the future.

Leaders can leverage human ingenuity and technology to ready their organizations for growth and innovation, but they need to move fast. They must relentlessly anticipate and act on change. This starts with pivoting the workforce. NOW.





RIDING THE DISRUPTION WAVE

The Indian pharma industry is undergoing unprecedented disruption, and it continues to evolve every day. Driving this change are three broad forces—socio-economic dynamics, regulatory and policy action, and digital disruption. To retain and build their competitive advantage in a fast-changing market, pharma companies need to respond to or lead the way in these three areas.

The socio-economic dynamics include the rise of millennials, increasing affordability and increasing prevalence of lifestyle-related diseases. On the regulatory front, major efforts are underway to draft comprehensive guidelines for several growth areas such as OTC (over the counter) products and distribution channels. Steps are also being taken to ensure stricter enforcement of existing guidelines such as the Uniform Code for Pharmaceuticals Marketing Practices (UCPMP). The third force encompasses digital disruption, which is revolutionizing the way pharma companies engage with patients and doctors. They need to invest in digital tools and portals to not only improve their salesforce effectiveness but also optimize their costs to serve. Investing in analytics capabilities will further allow companies to harness all the data available in digital sources and synthesize them to derive objective insights.

This section delves into these disruptive forces and their impact on the business models of pharma players in India—from changes in the portfolio mix and go-to-market strategies to a shift in mindset from being drug product suppliers to companies that offer value add.



SOCIO-ECONOMIC DYNAMICS

Rise of the millennials

Tech-savvy, digitally enabled and discerning millennials are the largest living generation in India. They also comprise the biggest group in three key segments of the healthcare market – target patients, target doctors and target workforce (see Figure 1). This signifies a huge opportunity for the industry. But to capitalize on it, companies need to change their strategies and the way they work. Failure to engage this large and growing segment, will have a negative impact on consumer loyalty and revenue growth.

Patients are increasingly interacting with hospitals through websites and reporting data through wearables, which are growing in popularity among millennials. Companies can use the incredibly rich pool of objective data from wearables as design inputs for a range of products and services. Millennial patients are also active consumers of online medical literature. They proactively self-diagnose by googling their symptoms or search for patient recommendations on doctors.

Further, the number of medical millennials in India is also growing—the country has approximately 7 lakh active doctors (see Figure 2). Of this, 13–15 percent are estimated to be millennials. By 2025, this figure is expected to rise to 40–45 percent.^{1&2}

Figure 1: Millennials are the largest living generation in India.

2/3

**Share of population
aged < 35 years**

>1 bn

**Expected workforce
strength by 2027**

Source: Census of India

Figure 2: With an ever-increasing number of young doctors, the acceptance of digital mediums is expected to rise.



~1 mn

**Number of registered
doctors (Jun 2016)**



~50,000

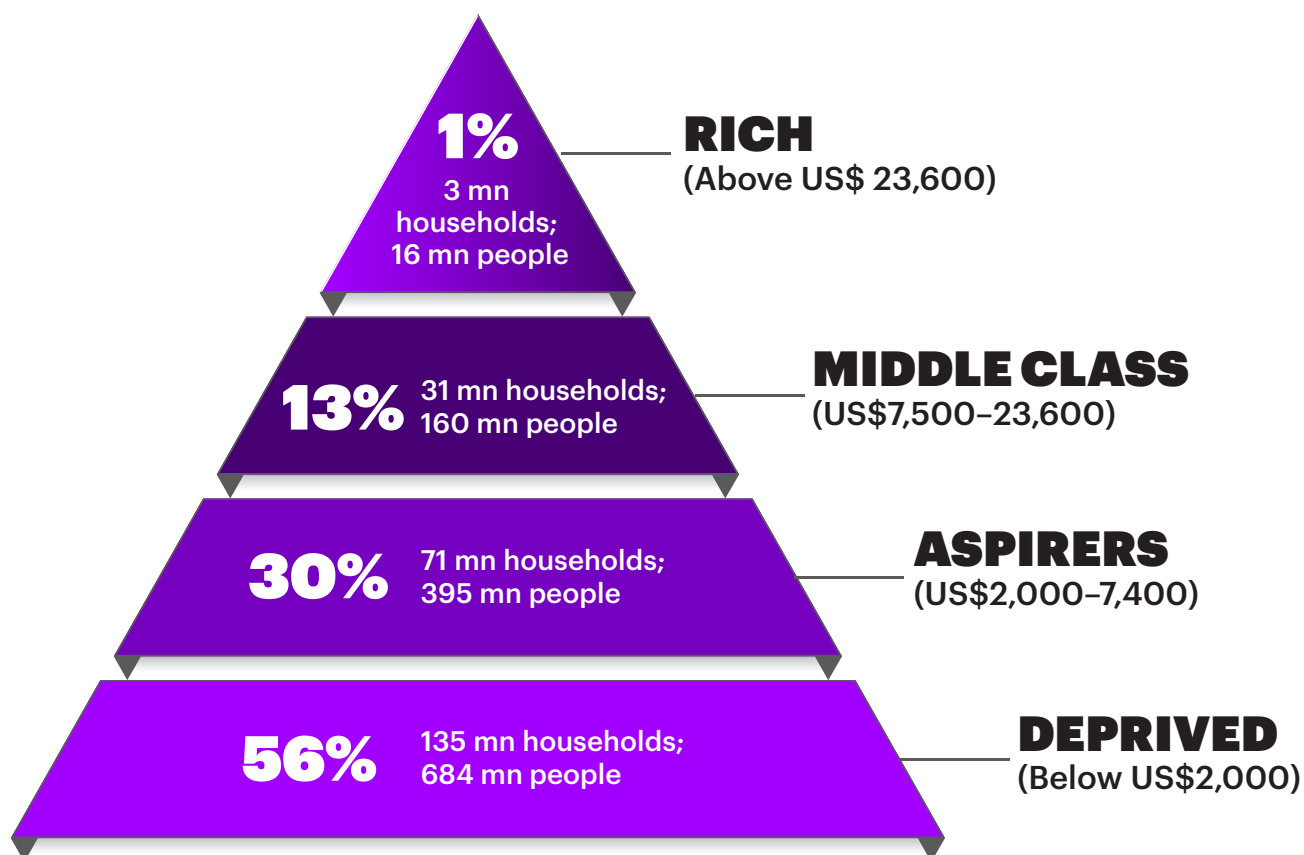
Number of MBBS graduations per year

Similarly, as the number of millennials in the salesforce at pharma companies grows, the way companies manage them will also undergo drastic change. For instance, the use of digital assistants such as apps is expected to go up. These assistants will help sales representatives plan their day better and record key doctor asks for further processing and redressal.

Increasing affordability

India's per capita income is growing, with close to 44 percent of households now reporting annual income of more than US\$2,083.³ As a result, the capability to shoulder out-of-pocket medical expense is also expected to improve (refer to Figure 3). In such a scenario, more people can afford branded generics and innovator segments.

Figure 3: Affordability is growing, giving rise to branded generics and innovator segments.

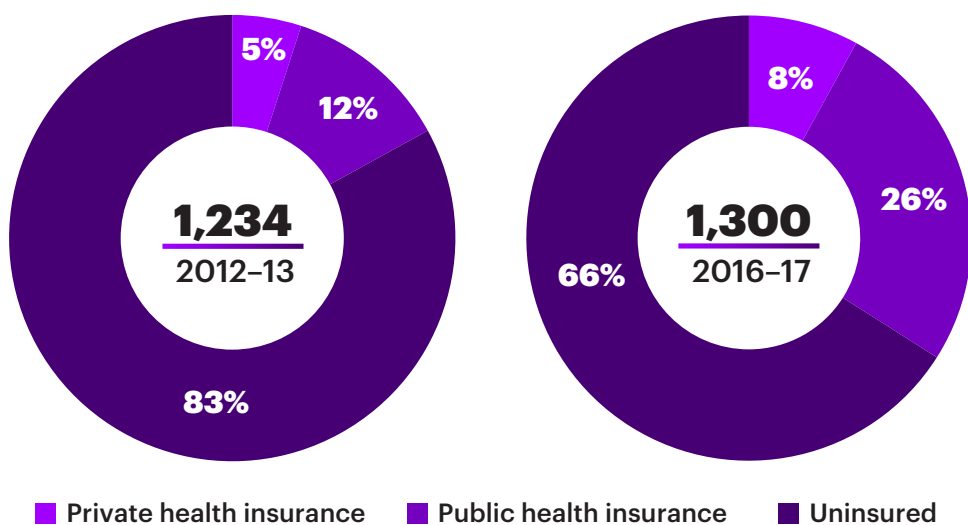


There is also greater focus on providing public insurance coverage for the population at the bottom of the pyramid, and this is expected to drive drug consumption (see Figure 4). Schemes by the Central and state governments, such as Ayushman Bharat, Rashtriya Swasthya Bima Yojna (RSBY) and Gopabandhu Sambadik Swasthya Bima Yojna (GSSBY), are driving affordable health cover.

Insurance coverage in India has shown a definite uptick in the last four to five years (Figure 4).

Figure 4: Insurance coverage in India has shown a definite uptick in the last four to five years.

Insured population in India (in million)



Source: IRDA Annual report 2017

Rising prevalence of lifestyle diseases

Chronic diseases are on the rise worldwide, and India is no exception. This shift in the pattern of disease from acute to chronic is taking place at an accelerated rate. Furthermore, the prevalence of these diseases is growing among the affluent as well as the poorer population groups.

According to a Confederation of India Industry (CII) study, each year, approximately 5.8 million Indians die due to heart and lung disease, stroke, cancer and diabetes.⁵ **So, it is estimated that one of four Indians is at risk of dying from a lifestyle disease before the age of 70, every year.**

This shift in disease pattern is expected to alter the industry, with chronic therapies accounting for a growing share of the market.⁴



REGULATORY AND POLICY ACTION

Thrust toward insurance coverage

Regulatory and policy interventions are expected to have a material impact on the commercial dynamics in the domestic market. Government focus and increased spending on healthcare will have a multiplier effect on the industry and create new opportunities for pharma companies.

Additional thrust on the Jan Aushadhi scheme, which aims to distribute low-cost generics through approximately 3,000 exclusive not-for-profit outlets, will also have a bearing.⁸

Robust regulatory frameworks

Regulatory efforts are also under way to define a clear segment for OTC products.

A Central Drugs Standard Control Organisation (CDSCO)-constituted committee has been tasked with carving out a separate schedule for OTC drugs.⁹ While the final guidelines are still awaited, clarity in classification will help pharma players introduce especially designed products and promote these products directly to patients.

Comprehensive guidelines are expected to help streamline the nascent e-pharmacy sector and open avenues to make pharma distribution more efficient and transparent in India.

While it is still early days for the industry, pharma companies need to keep an eye on the changing regulatory landscape and engage with budding e-pharmacies so that they can tap into this emerging landscape. When engaging with e-pharmacies, companies can leverage the skills of their key account management teams.

Policy push is driving stringent implementation of Uniform Code of Pharmaceutical Marketing Practices (UCPMP) and encouraging companies to discontinue the practice of giving doctors cash or kind incentives. Quite naturally then, science-backed selling and ethical promotion will gain centerstage and need to be the focus areas for pharma companies.

Any further legislative push to prescribe drugs by their generic names would provide additional thrust and hasten up this transition.

Healthcare spend is expected to increase from 1.2 percent of GDP in 2017 to 2.5 percent by 2025.⁶

Among the government's policy goals, setting up six new All India Institutes of Medical Sciences (AIIMS) with provisions for tertiary care and creating super speciality blocks in 70 medical colleges will be the key two drivers for speciality drugs consumption.⁷



DIGITAL DISRUPTION

Healthcare consumerization shifting power to patients

In the age of information, consumers are increasingly consulting digital sources such as Google instead of doctors.

Add to that, consumers are willing to spend more on healthy living and wellness. Medical technology companies have been quick to pick up on this trend and are offering a host of lifestyle products and related services that promote and support this kind of living, from fitness devices to sleep trackers.

These trends will ultimately change how healthcare is delivered, accessed, perceived and reimbursed. And it will open new opportunities for pharma companies. For example, aggregating personal health data enables better healthcare predictions, early prevention, greater personalization of care and more effective outcomes measurement.

The other important implication is on customer expectations. Ever-connected consumers will have higher expectations than ever before as combinatorial technology and new business models provide many ways for them to discover, purchase and engage. Pharma companies will need to step up patient engagement to live up to expectations.

Convergence of healthcare and digital ecosystems

The healthcare ecosystem has been gradually undergoing a digital transformation over the last decade, with providers increasingly focusing on enhancing patient experience and improving operations. Payors have looked at managing key processes such as claims management using artificial intelligence (AI). Patients are increasingly embracing technology through wearables, health apps and therapy-related searches. Pharmacies and stockists have started embracing management information system (MIS) solutions. The government is also propelling the digital agenda by developing a blueprint for health data exchange.

While these individual stakeholder journeys will continue, the megatrend would involve them joining forces with digital services companies to ultimately improve patient outcomes.

There are numerous global examples of such a convergence. Digital companies such as Google (Verily, DeepMind) and Microsoft are expanding their footprint in healthcare. Startups such as Flatiron Health, which recently raised funds from Google Ventures, are partnering with established players like Roche to bring personalized medicine in oncology to market.

Several digital healthcare companies are working on the intersection of stakeholder interactions. Examples are Practo (linking doctors to patients), Netmeds, 1mg (e-pharmacy), Curofy, Lybrate (doctor communities), Healthians (diagnostic aggregator) and Curefit (wellness support). Such companies will work closely in these ecosystems to create partnerships for mutual benefits (see Figure 5).

To fuel growth, pharma sales organizations are also working toward delivering an engaging omni-channel experience for doctors. These companies have already started investing in digital technologies and sales tools to improve sales effectiveness and optimize cost to serve.

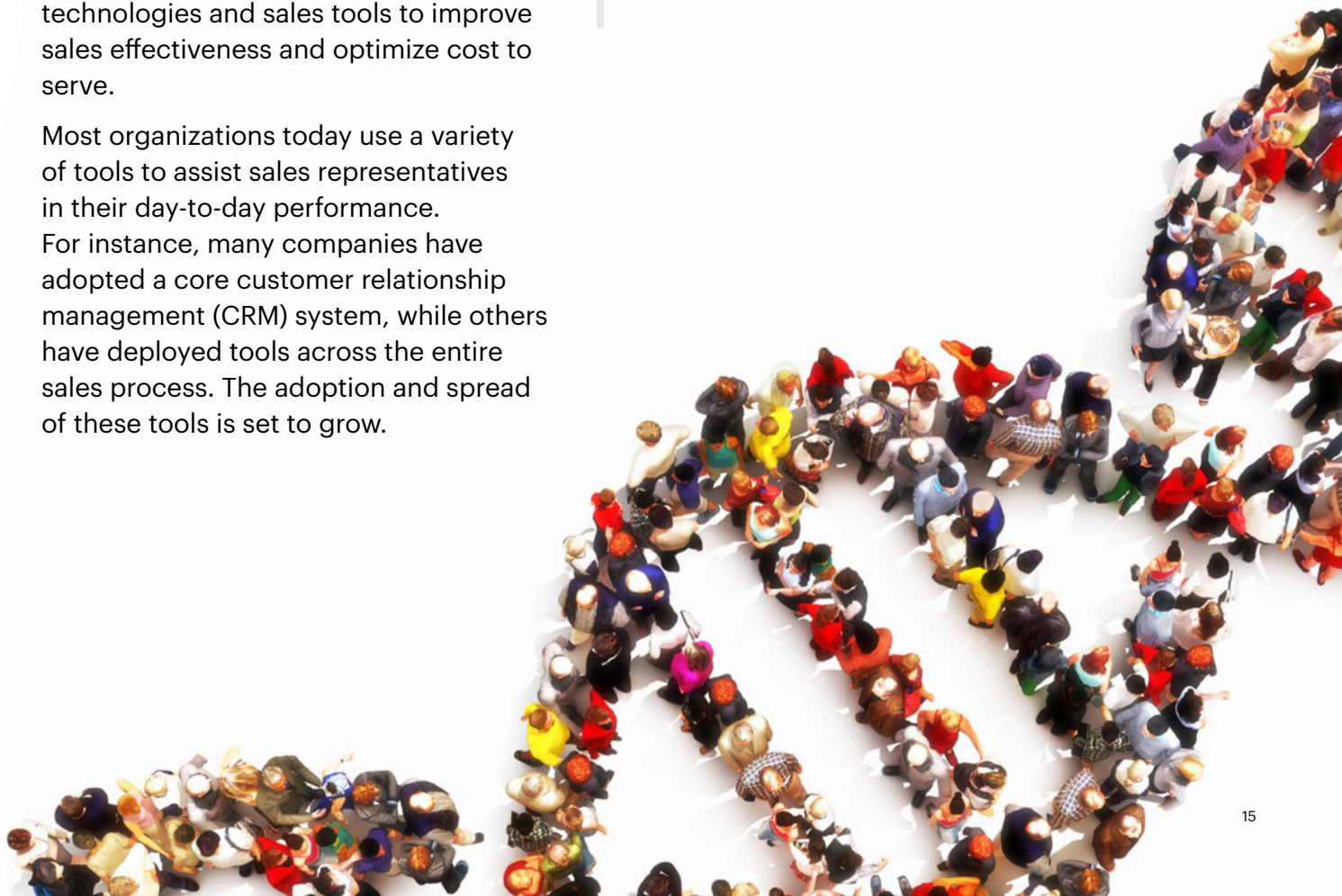
Most organizations today use a variety of tools to assist sales representatives in their day-to-day performance. For instance, many companies have adopted a core customer relationship management (CRM) system, while others have deployed tools across the entire sales process. The adoption and spread of these tools is set to grow.

Figure 5: Several digital healthcare startups are working on building stakeholder interaction.

Patients



Physicians



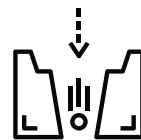
Further, as our research suggests, digital adoption will be influenced by two specific considerations:

- Digital will not be enough. Investments in sales tools and digitization should have a favorable impact on metrics such as target achievement, and companies' ability to retain and engage top sales talent. However, this is yet to be seen. Companies that can link outcomes to investments will create sustainable business cases for digitization.
- The next wave of change will be on making enabling tools simple, effective, personalized and relevant to specific selling moments and the needs of individual doctors, representatives and patients. While these tools have evolved to include more features, many customers and reps see tools as a barrier rather than a performance enhancer – those using them are not fully leveraging the tools. The ability to customize the tools and make them intuitive is what will drive effective usage and subsequently produce business outcomes.

Advanced analytics as a differentiator

Next to technology adoption, a data-driven mindset and analytical capabilities will be the key factors in determining future success. These are the building blocks that will enable pharma companies to leverage technology, understand customers and consumers, and drive internal efficiencies and productivity.

While few pharma companies dispute the importance of data, most have not yet become truly data-driven. **Future operating models will view and incorporate data as DNA, the fundamental ingredient for the entire organization, governed by a top-down mandate and actively supported by every employee.** As the pace of change accelerates, dramatically expanded and continually renewed data will become vital to survive. It will be key to enabling pharma leaders and individual employees to make the best decisions at optimal speed.



MINDING THE GAP

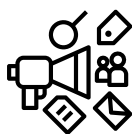
Many pharma companies are responding to these forces of disruption by creating forward-looking strategies around three broad areas—product mix, shifts in the go-to-market and focus on patients. **But a key question these companies need to ask themselves is, can their operating model support their strategies?** An effective operating model that considers these areas is critical to executing strategies successfully, overcoming the forces of disruption and creating value. In other words, to thrive, companies need to bridge the gap between their new strategy and their old business model.



Portfolio mix

With increase in affordability (through out-of-pocket and access-related measures) the number of innovator drug launches in the country is expected to increase. The trend is already evident. Take a look at the launch of patented drugs in India after 2012. **The average time between the global launch and the India launch has significantly decreased—most drugs are being launched in India within 18 months of their global launch.** In addition, specialized skills to conceptualize pricing mechanisms and design patient assistance programs that address both RoI investment and patient reach will drive success of the innovator segment. The increase in chronic disease prevalence is also going to drive the specialty market segment.

The portfolio mix will also see an increase in nutraceuticals, herbal and OTC products, with participation by not only legacy pharma companies but also new players, including conventional fast-moving consumer goods (FMCG) companies.



Shifts in go-to-market

Pharma companies will need to build capabilities to ensure relevance with the existing channels such as institutional sales and leverage the evolution of newer channels such as e-pharmacies.

With growth in institutional sales and e-pharmacies, companies will need to engage with them as key accounts.

The private and corporate hospitals (institutional) segment is also increasingly consolidating its procurement requirements, and the trend to procure centrally is only expected to increase. In addition, many public institutions (for instance, the Armed Forces and the Railways) are also expected to grow their procurement budgets. These shifts, accentuated by policy interventions aimed at more centralized, efficient procurement practices, will make it vital for pharma companies to have a dedicated team to engage with not only doctors but also the procurement and reimbursement staff at hospitals.

Another change is in how drugs are being distributed. e-Pharmacies, while still representing only a minuscule share of the overall market, have demonstrated strong growth over the past couple of years. With regulatory clarity and ever-increasing e-commerce penetration, the sector is expected to achieve significant growth in the future as well. Developing relevant e-commerce skills is key if they want to leverage this channel and engage with e-pharmacies early on in their life cycle.

The market is also seeing a growing need for omni-channel engagement. Doctors are increasingly taking to the digital medium to engage with pharma companies.

With increasing use of digital content, doctors expect medical representatives (MRs) to provide in-clinic detailing, supported by digital literature that is both current and visually more appealing.

In addition to in-clinic detailing, on-demand content hosted online—enabling doctors ease of access—is also gaining ground. This content is offered through dedicated apps and portals developed by medico-marketing teams at various companies to enable them to showcase their medical prowess.

Greater use of technology in the rep–doctor engagement would make linking rep performance to actual sales outcomes possible. The traditional metric of “call average” would be replaced by “quality of calls;” actual sales generated through a doctor would be measurable through focused sales audit; and tracking secondary sales on an ongoing basis would be made possible at least for the key distributors.



Pivot to the patient

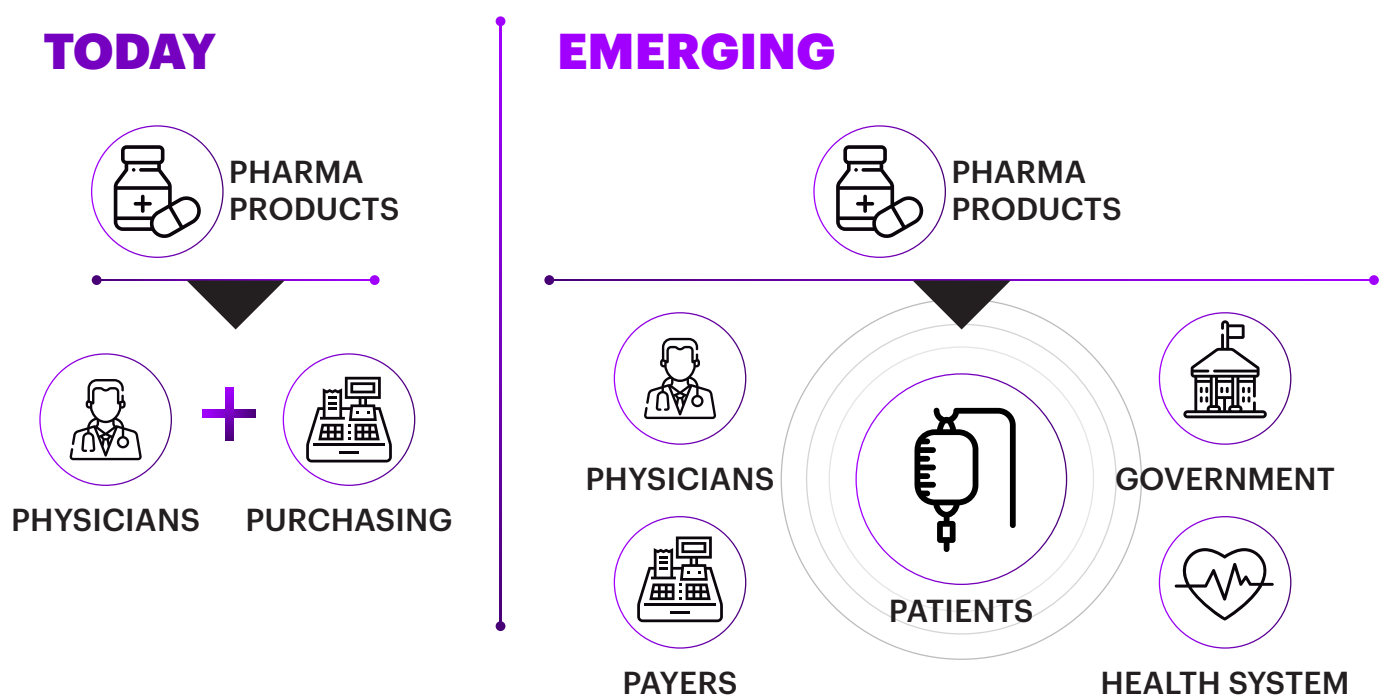
As mentioned, the digital future entails direct engagement between patients and pharma companies. Given the increasing prevalence of chronic ailments, the need for long-term interactions through the disease life-cycle will increase. In such a scenario, driving such interactions will create value for the patient and the company.

This may be something as simple as offering a mobile app that supports patients with compliance or drug administration. Or it may be adopting a sophisticated platform play that uses patient data to help in areas such as proactive clinical decision-making and patient support, treatment adaptations and proactive doctor consultations.

We have seen that healthcare will increasingly be an important policy agenda for the government, and both the central and state governments are acting as payors. However, this will also have a significant increase in healthcare budgets, especially given the increase in chronic diseases. Hence, the need to treat more and more patients for less money would create demand for outcome-based measures in the Indian healthcare system. To ensure that pharma companies remain relevant in this new scenario, companies will need to come up with innovative methods to track and measure patient outcomes (see Figure 6).

As a result, the role of pharma companies will shift from being “pill providers” to “disease managers,” i.e., they will work with patients to ensure overall well-being.

Figure 6: Pharma companies need to stay relevant by coming up with innovative methods to work with patients and ensure their overall well-being.





BRACING FOR CHANGE

Pharma companies need to proactively prepare themselves to respond to the changes in their business models—what products they offer, channels they offer them through and how they engage with patients. They then need to look at the impact those changes will have on the job mix, skills required and workforce mindset, and employee practices or value proposition. Through our discussions with industry leaders, we identified six distinct talent themes that broadly cover the skills pharma companies will require to become future-ready. These themes include skills that are already present in the organization but need to be significantly adapted (evolutionary) as well as those that are currently nascent and need to be advanced (emerging).

Evolutionary themes



The rep renaissance

The traditional role of the rep as the “communicator” of scientific and marketing content is increasingly losing relevance with digital tools offering a far more targeted and effective means to present content to doctors.



Content to customer experience

Brand managers, who have traditionally focused on incrementally improving the content to be delivered to doctor, will now focus on doctors’ experience of the company brand.



KAM 2.0

With the increasing rise of the institutional segment, certain new KAM skills will become critical: the ability to price strategically, and engage and influence the accounts to ensure empanelment.

Emerging themes



Beyond the pill

Patient engagement will emerge as an important function of the new commercial organization as companies look to differentiate themselves.



Embedding digital thought

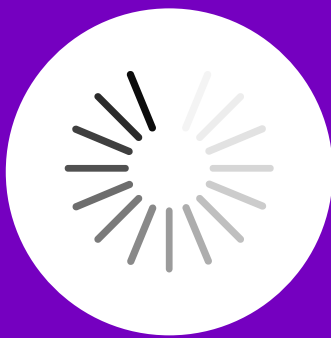
To unleash the power of digital, pharma companies need to enable it to cut across functions and ensure digital initiatives are close-looped.



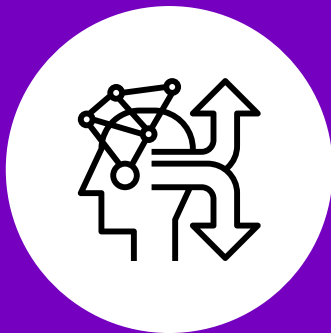
Analytics at the core

Data, which will be key to enabling leaders and individual employees to make the best decisions at the optimal speed, will need to flow seamlessly across business models, functions and project teams, and centrally facilitated.

The next section provides a deep dive into these talent themes and looks at them through the following guiding lenses:



THE NEW NORMAL:
What will change in the talent theme?



SKILL ENABLERS:
What key skills are required to fill the skills gap?



ORGANIZATIONAL SHIFT:
How can organizations embed the “New” skills in their workforce?

THE “NEW” ORGANIZATION

The growing industry disruptions are set to reinvent the overall work experience for employees across all levels of an organization, including the leaders. To succeed in this environment, organizations must reimagine work, pivot their workforce to new growth models and “new skill” their people to do more valuable work. By embracing the future of work, they can create a more adaptive, more relevant workforce.

The key skills pharma organizations need to focus on can be broadly bucketed under six themes. This section focuses on each of these themes, with a focus on what’s new, the skills required to fill the gaps and how organizations can imbed new skills.





MRs have formed the base of the traditional commercial salesforce. According to almost all the pharma leaders we spoke with as part of our research, MRs are critical to converting sales pitches. However, with the explosion in digital communication channels, the traditional role of the representative as the “communicator” of scientific and marketing content is increasingly losing relevance.

Digital tools offer a far more targeted and effective means to present content to doctors. Further, given the lack of objective reporting data, the role has for too long focused on descriptive metrics such as call average, rather than productivity metrics such as return on investment (RoI).



While the MR’s role will continue to be key over the next three to five years, we expect a significant transformation in the way the role is performed. The proposed changes will happen across three dimensions:

From company representative to doctor’s assistant

With the rise of digital, scientific content is already available with the doctor and the patient. To ensure they remain relevant, representatives need to move away from transactional selling to consultative selling and focus on two specific areas:

- See the world through doctors’ eyes to understand their needs, and solve problems by serving customers as individuals, not as numbers in a call roster.
- Help doctors provide better services to patients through better engagement, training, product availability and compliance. Technology such as apps and platforms will play the role of the digital assistant.

From intuition to preparation

One of the top objectives of sales representatives will be improving sales effectiveness as they move to a more collaborative, team-based and influence-centric selling approach. Technology will play an important role—armed with a digital assistant, the representative can effectively use insights to plan, deliver and report calls.



SKILL ENABLERS

Relationship management

MRs need to use their skills, tools and knowledge to create, communicate, evolve, grow and maintain customer relationships.

Digital awareness

They need to be open to new technology and tools, and integrate them in their daily work.

Analytical interpretation

To drive better outcomes, MRs need to be able to read trends and gain related insights.



ORGANIZATIONAL SHIFT

To ensure a successful transformation, organizations need to develop, execute and optimize the MR renaissance. Linking the entire representative journey, from recruitment to continuous improvement, would be key (see Figure 7). This will require extensive use of digital tools and a robust business intelligence layer to enable decision-making.

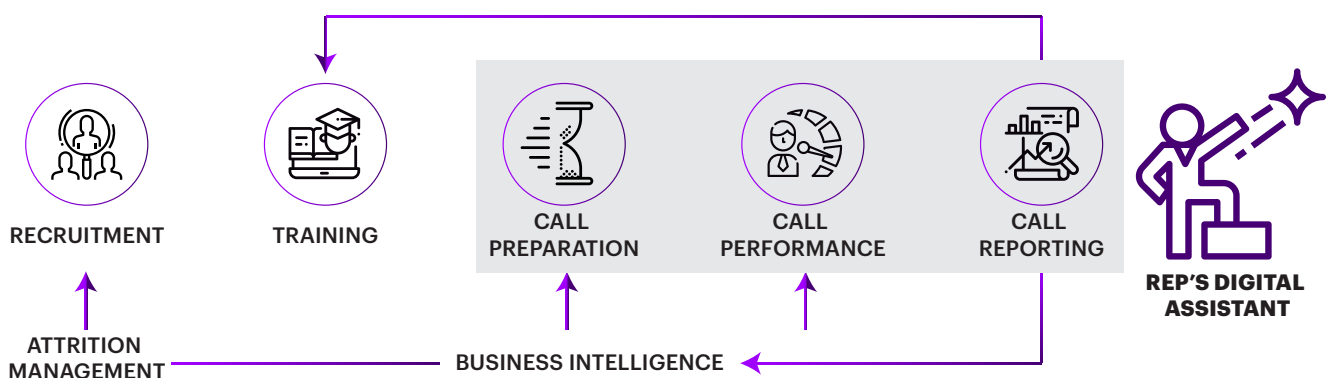
Reimagining work with the digital assistant.

The representative checks his smartphone in the morning to get a list of his appointments for the day. It mentions the three primary pain points of each of the doctors he will be visiting and directions to his office, pre-loaded into the GPS. Before the representative reaches the first address, he receives an update on the queries raised by the doctor in an online continuing medical education (CME) attended three days ago. The digital assistant extracts the answers from top trending news articles. Within seconds, the representative has the information he needs for the call, in-context market updates and a conversation starter—all of which surface automatically and are embedded in the CRM. After the appointment, the representative enters the meeting notes, and the AI sales coach says, “Great job!” The digital assistant automatically extracts action items from the notes, and sends a follow-up e-mail to the doctor.

From doctor to ecosystem

By reducing the time they spend in the doctor’s cabin, representatives can now spend more time engaging with channel partners and patients.

Figure 7: For a successful transformation, develop, execute and optimize the rep renaissance.





CONTENT TO CUSTOMER EXPERIENCE

For a very long time, brand managers have focused on improving the content they deliver to doctors instead of enhancing the brand experience for doctors. As the rules of engagement change, the ability to differentiate would no longer be driven by content but customer experience.



THE NEW NORMAL

The brand manager's role will no longer be limited to selecting templates and promotional items for the next cycle of communication. It will include understanding doctors and patients, and how they want to be engaged; building ecosystems to offer the right solutions; and continuously optimizing and adjusting as customer expectations change. Knowledge of customers and building engagement using that knowledge will be key. The process will include the following:

From company representative to doctor's assistant

Experience-led brand management centers on gathering a deep understanding of the doctor and, through analytics, turning that data into timely customer insight. Analytics enable pharma companies to identify customer behavior patterns, personalize customer interactions and anticipate future needs.

From intuition to preparation

Once pharma companies have a good understanding of doctors, they can begin to build relevant experiences that doctors value. After that, companies need to conduct user research to identify which opportunities to align, differentiate or disrupt. The underlying analytics must ensure the right message at the right time at the right place for doctors.

Uniform experience across channels

Doctors need a uniform experience across all divisions of the company and all mediums of interaction. This calls for a strong content management capability, where the core values of the "company as a brand" are retained.

Revisit

For signature experiences, the plan should be periodically revisited to ensure that the experience meets evolving customer expectations.



SKILL ENABLERS

Customer mapping

MRs should be able to identify key customer characteristics and pain points across the customer experience journey.

User experience

They need to design solutions that drive customer experience.

Content management

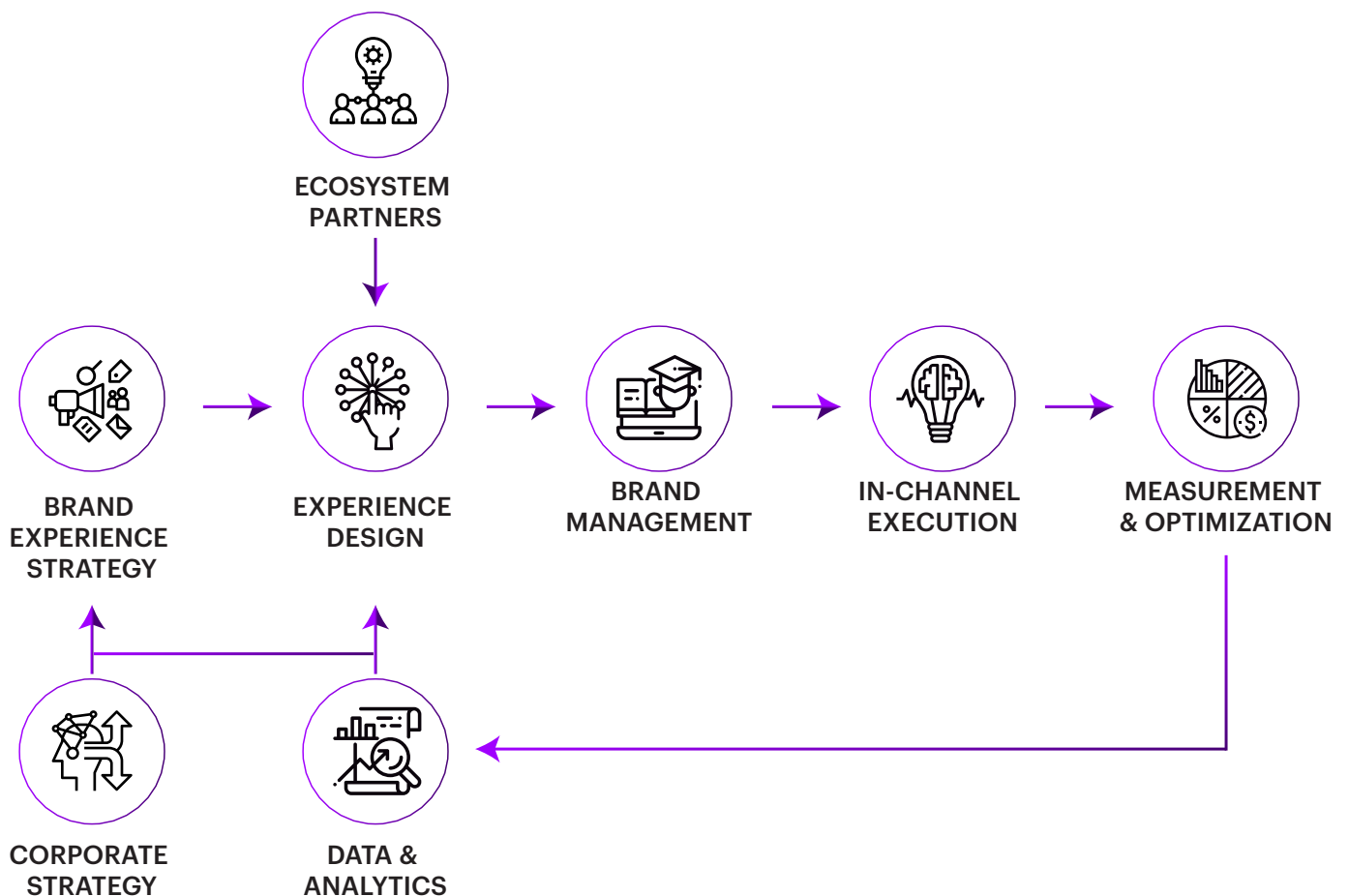
They must retain the core identity of the company and the brands across communication channels.



ORGANIZATIONAL SHIFT

Critical to a transformation is building an organization that can develop, execute and optimize the doctor experience. This can be achieved by using information gathered from the ecosystem partners and analyzing it to ensure process improvement (see Figure 8).

Figure 8: Building an organization that can develop, execute and optimize the doctor experience is critical to a transformation.





KAM 2.0

The institutional channel will increasingly become prominent—be it corporate or public hospitals, large public institutions or payors. As part of the structural shift, the buying process is expected to become more centralized and consolidated.



THE NEW NORMAL

The rules of engagement with these institutions will change, and the KAM function will need to transform. It will need to focus on:

Greater stress on advocacy

This is specifically relevant for public institutions. Customer advocacy to ensure early empanelment will enable value capture. Moreover, in a bid to create win-win propositions, a pharma company's ability to structure outcome-based deals (where reimbursement is linked to patient outcomes) can be a significant differentiator.

Strategic pricing

As the scale of institutional buyers increases, so will their bargaining power. To protect value, pharma companies will need to move the discussion away from the cost of the drug to the overall benefit or outcome for the patient. The pricing proposition will increasingly need to be health economics driven. Further, rather than episodic discussions on pricing, the focus would need to be on long-term contracts, where the gain in volumes can offset the discounts provided.



SKILL ENABLERS

Account management

KAMs must engage with the procurement function of key accounts, both public and private. With strong negotiation skills, they can advocate both for the portfolio and price.

Strategic pricing/Buyer access

KAMs must be able to design buyer access programs in partnership with payers and ensure the enlistment of the company's products in reimbursement programs.

Health economics/Outcomes management

They must quantify drug benefits in terms of overall gains for the patient, for example, the decreased likelihood of readmission.



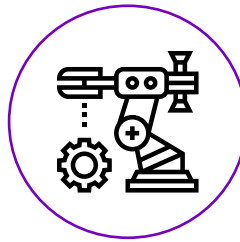
ORGANIZATIONAL SHIFT

While the KAM function exists in most pharma companies, the new skills required may pose certain challenges, specifically because skills relevant to health economics and outcome-based reimbursement are quite nascent in the country. However, pharma companies can strengthen themselves in the following manner:



Leverage global frameworks—customize to local context

While nascent in India, the skills required by health economists and pricing managers are available in global organizations. Indian pharma companies can leverage the existing frameworks and contextualise them to local requirements.



Leverage ancillary industries

Industries such as medical devices have had relatively strong KAM functions. Select FMCG companies also may be a potential source of talent as they have experience of working directly with manufacturers, a key skill KAMs will need to build.



BEYOND THE PILL

Given that the market is primarily that of branded generics, one area that has not got much focus is patient engagement, because RoI is difficult to determine or quantify. However, with the advent of digital technologies, the cost of engaging with patients is significantly decreasing, especially when it comes to chronic therapies such as asthma and diabetes.



THE NEW NORMAL

Patient engagement will emerge as an important function of the new commercial organization as companies look to differentiate themselves.

The components of the functions will comprise:

Patient awareness

Patients are increasingly referring to online resources to self-diagnose their conditions and find treatments. For pharma companies, ensuring patients have access to credible information online is imperative. Doing so would help them create a brand differentiation for patients early into the treatment.

Patient support

Helping patients cope with their disease is also going to be critical. This could be through direct means, such as by helping them procure medicine through e-pharmacy, or by providing tips on how to manage their disease better. A lot of pharma companies are already doing this through support-focused mobile apps.

Improving care quality

The main cost driver of patient care is not only the disease itself, but also the associated comorbidities. By detecting early-stage deterioration in a patient's health, the right measures can be taken to prevent the disease and the potential comorbidities. One method of patient engagement involves the use of monitoring devices such as wearables, glucometers and sphygmomanometers. These devices offer unique potential for patient data aggregation and the application of advanced analytics to anticipate prevention and precise therapy adjustments for better quality of care. They also help to enable clinical outcomes to be measured on an individual or population basis and reimbursements to be made accordingly.

Community support

Linking patients with similar conditions through physical or digital groups can help them manage their disease better.



SKILL ENABLERS

Disease awareness

MRs need to be able to understand the patient journey for specific diseases and appreciate the key gaps between patient experience and clinical outcomes.

Ecosystem management

Given that the role will require working with doctors, providers and payors, representatives should be able to work and manage partnerships across the healthcare ecosystem.

Digital literacy

They must understand the various digital engagement tools available to address the existing gaps in the patient journey.



ORGANIZATIONAL SHIFT

To achieve effective patient engagement, pharma companies need to work with the healthcare ecosystem and adopt a partnership mindset. If a company does not understand the stakeholders and their specific needs, it will never be able to build the trusted relationships needed to create a powerful, thriving patient engagement program. Success rests on attracting a broader range of participants than just physicians, labs or pharma companies, important as those relationships are. Of course, while developing these partnerships, pharma companies must remember one of the fundamental principles of every healthcare-related activity: ensuring data security and quality control are maintained at the highest possible level.



EMBEDDING DIGITAL THOUGHT

To unleash the power of digital, the transformation must cut across functions within organizations—the gains are maximized only when digital initiatives are close-looped.



THE NEW NORMAL

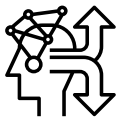
Embedding digital skills at a company level would be one of the most important tasks for pharma leaders. Here, two dimensions of change are necessary:

Human-centered design

Instead of taking a traditional technology-centered approach to solution development, pharma companies need to tailor designs to the needs of representatives as they engage with customers. The service should be easy to use, have an easy-to-access user interface and offer a seamless experience across stakeholder channels so that MRs can close sales without a hassle.

Leverage your ecosystem

While companies can build internal capabilities to enable digital thought process, they must also rely on a network of external partners to fill skill gaps. These partners can be ecosystem players (payors/providers) or start-ups. Through these partnerships, pharma companies can access innovations faster and expedite pilots.



SKILL ENABLERS

Business + technology

Companies' understanding of business will be based on a sound appreciation and understanding of technology benefits—they don't necessarily need to be "coding" experts.

Human-centered design

They should be able to customize tools to personal needs.

Program management

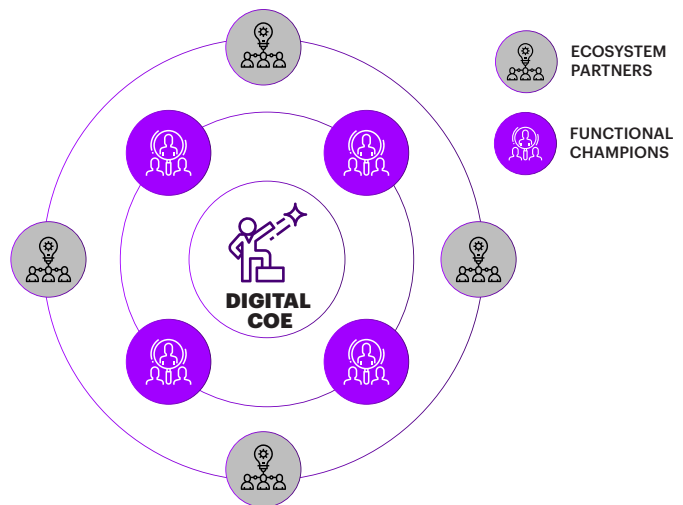
Organizations need to have the ability to ensure internal and external stakeholders and eco-system partners work together to implement digital initiatives.



ORGANIZATIONAL SHIFT

While a digital center of excellence (CoE) is desired, it will need to be supported by individual champions within functions (see Figure 9). This interaction between CoE and functions is necessary to ensure that digital solutions are firmly rooted in the organizational context. Finally, the role of an ecosystem as an extended arm of the company helps in creative disruption.

Figure 9: Interaction between the digital CoE and functions is necessary to ensure solutions are firmly rooted in the organizational context.



ANALYTICS AT THE CORE

Indian pharma companies are in the early days of advanced analytics adoption. Hence, there aren't significant differences in the business performance of leaders in this space versus the laggards. But there is no doubt that those that do not make advanced analytics a core business competency will perish.



THE NEW NORMAL

Pharma companies should seek to maximize the benefits of this technology by ensuring they acquire the requisite data and technology. The key initiatives required are:

Create a data warehouse: Two specific actions are required here:

- Gather all the data:
The larger the datasets, the more insights advanced analytics engines can infer. Pharma companies have been combining internal data from across the business. However, there are still opportunities to gather more transactional and unstructured data from areas such as channel partners and digital channels. Also, Indian pharma significantly lags behind other industries in the use of external data, including freely available web data and open datasets published by governments.
- Grow the organization's insight account:
The majority of corporate insights reside within desktop computers and laptops rather than data warehouses. As a result, most companies have information silos spread across each functional area. They also lose knowledge due to employee churn. It is crucial to maintain virtual analytical records that allow data scientists to recreate datasets across any time period and for any customer cohort.

Design analytics to enable rapid insight to action: There are three primary value drivers to consider when making technology choices:

- Deliver packaged insights:
Enable teams across the organization to develop insights by giving them restricted access to virtual analytical records through a modern visualization tool.
- Empower the end-user:
Use analytics apps to translate insights that can seamlessly reach the desired end-users.
- Ensure models deliver near-real time responses:
Increasingly, analytics outputs are automating decision-making in real time. The prime example of this is providing inputs to a representative before a doctor call. Pharma companies need to deliver near-real time responses through application program interfaces (APIs) on a cloud-based analytics technology platform.



SKILL ENABLERS

Data scientists	Organizations need skills to mine and analyze huge unstructured datasets to draw relevant insights and integrate multiple datasets from disparate sources.
Visualization engineers	With the ability to demonstrate the findings in an engaging and stakeholder-ready format, this team is critical in maintaining the engagement of the business.
Product owner	The product owner decides on the analytics priorities, has a deep understanding of the drivers of business value and the organization's strategic priorities, and has visibility into/understanding of what the end user wants.



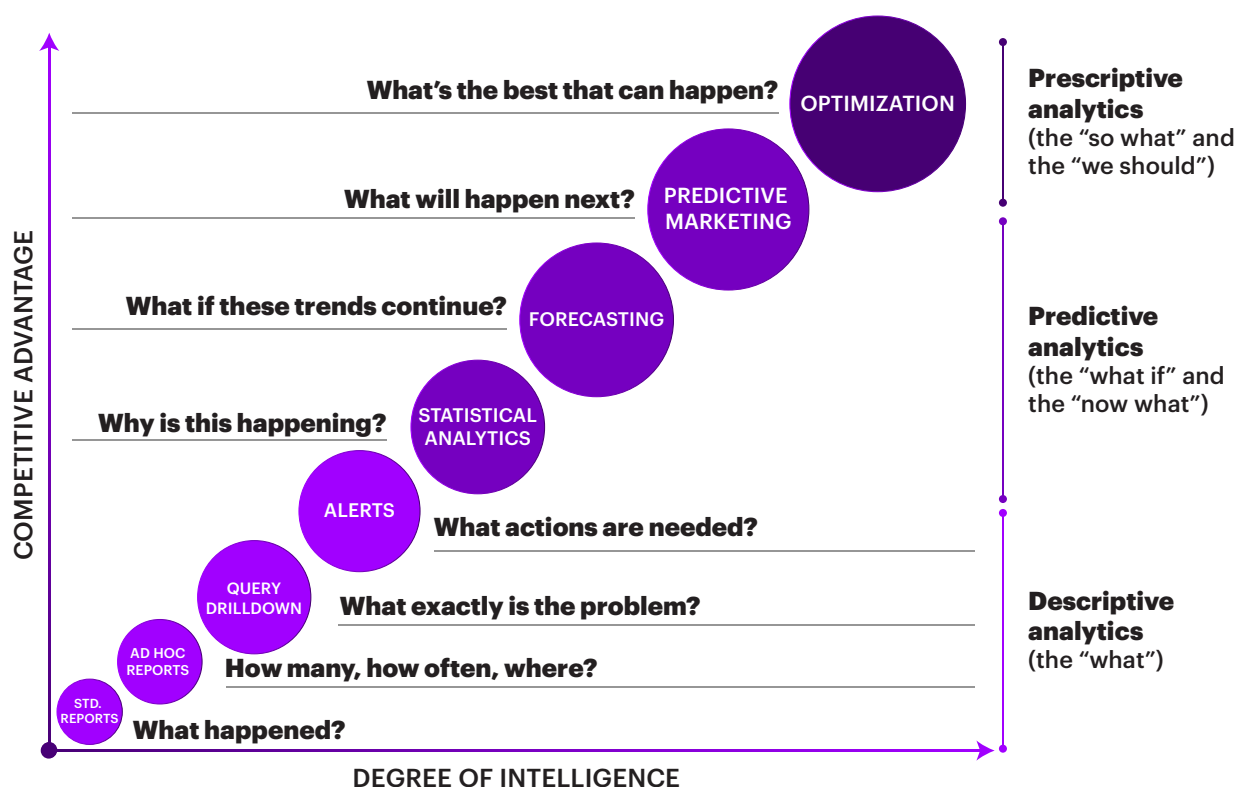
ORGANIZATIONAL SHIFT

As most pharma organizations are just starting their analytics journey, and given the specialized nature of the function, an analytics CoE is the recommended approach.

Geographic co-location is key—the data scientists, the visualization engineers and the product owners must work together in the same office as much as possible, to allow immediate interventions.

From an organization point of view, it is important that the analytics roadmap is established at the beginning of the transformation. As the analytics maturity of organizations increases, the journey from descriptive to predictive and finally prescriptive analytics will happen (see Figure 10).

Figure 10: Analytics roadmap: As organizations move up the analytical maturity curve, they go from descriptive to predictive and finally prescriptive analytics.



Pharma companies can create new business value and drive success by putting human skills at the heart of what they do. To build the workforce of tomorrow—today—companies need to reimagine the future, accelerate their focus on people skilling and strengthen their talent pipeline. Companies that do not invest in this area will not be able to unlock their full value potential or increase their competitiveness. While many leaders are already creating focused strategies around this imperative, how fast they are able to execute their strategies will make all the difference. The next section looks at the top three approaches leaders need to drive in their organizations to shape and prepare this future workforce: reimagine the future organization, accelerate people skilling and strengthen the talent pipeline.



CREATING THE FUTURE WORKFORCE, TODAY

The massive transformation of the pharma industry will give way to winners and losers—both organizations and individuals. The shifts that we detailed in the previous sections will wreak havoc at multiple levels across the industry. For pharma companies, the journey promises to be anything but easy.

It would be prudent for organizations to brand this revolution as a human resource (HR) issue.

Creating the future workforce—now—is the responsibility of the leaders in an organization because of the complexity and the urgency of the challenge and opportunity.

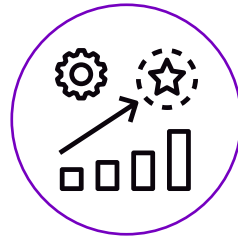
For responsive and responsible leaders, the need of the hour is to harness the power of these structural shifts for long-term advantage and shareholder value. Most of all, leaders need to be mindful about putting their people first—at the center of change.

Navigating the path toward the workforce of the future will require leaders to ask tough questions, such as how can they:

The new leadership imperative is clear: Create the future workforce. NOW.



Attract and develop the new talent they need



Scale and accelerate the pace of change



Ensure the people with them now don't get left behind

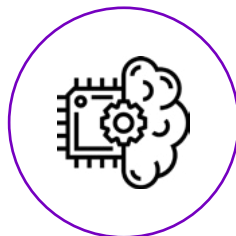


Secure the right amount and type of investment in their people to prepare them

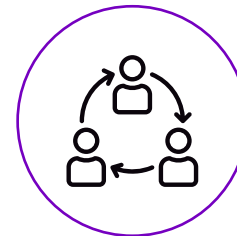
Through our interactions with industry leaders, we identified approaches leaders need to focus on to shape and prepare the workforce as well as the entire talent supply chain. These include:



1. Reimagine the future organization, today



2. Accelerate workforce reskilling



3. Strengthen the talent pipeline

The good news? A lot of leaders are already acting on these imperatives so that they can build their organizations with a workforce that is future-ready.

Reshaping their organization will allow workers to flourish in a future augmented by new tools and technologies in a way that drives real business value—labor productivity, talent acquisition and retention, and innovation and creativity.

The bad news? The clock is ticking. CEOs need to prioritize their people or risk leaving scores of workers behind.

1. REIMAGINE THE FUTURE ORGANIZATION

As pharma companies respond to a continuously shifting industry landscape, they need to challenge the assumptions their operating model is constructed on. It is imperative to articulate the blueprint for the workforce of the future. Doing so will help to clearly identify the people agenda and, hence, the call-to-action for reskilling and developing the talent pipeline. Here's is a look at how organizations of the future will function:



PUTTING CUSTOMERS AT THE CORE, EMPLOYEES AT THE FRONT

The future organizations will transform from “inside-out” to “outside-in.” They will pivot wisely, with a focus on creating and adding value for the patients and doctors they serve. They will also strive to provide superior experiences to drive employee engagement, retention and productivity, and ensure the career paths for the new roles are clearly drawn out.

A key step that organizations can take in this direction is using a digital workforce to augment their human workforce. Repetitive tasks (e.g., content management and call report generation) can easily be handled using a combination of RPA and AI. In this way, organizations’ productivity will no longer be driven by the number of hours worked but by the use of these innovative technologies to enable people to make more efficient use of their time.



DRIVING AN INNOVATION CULTURE

These organizations will foster a culture of innovation that will permeate across the ways employees engage and work with one another. A more collaborative, cross-functional setup between different enterprise functions will drive key initiatives aimed at delivering improved customer and end-user value, regardless of the function. Teams will employ an interactive, human-centered design approach to solving problems.



LEVERAGING PREDICTIVE INTELLIGENCE

Organizations will use predictive intelligence to understand the skills its workforce will require in the medium to long term and beyond. These insights will provide a valuable map to guide significant enterprise transformations and help them get answers to key questions:

1. How can they deliver their next product or service?

2. Do they have the workforce to deliver their growth agenda in a way that beats competition?

3. How are they prioritizing their people during this transformation?

While predictive intelligence can aid in planning for the future workforce, to remain effective, it must be continuous, iterative and remain a closed-loop process that involves all parts of the organization.

2. ACCELERATE WORKFORCE RESKILLING

As elaborated in the previous section, the roles primary to the pharma company are bound to undergo significant changes, such as that of MRs, who comprise approximately 80 percent of the commercial workforce.¹⁰ Reskilling will be central to the industry's workforce agenda.

Our research suggests that large numbers of the workforce realize they need to reskill to remain relevant. Hence, by increasing the pace at which workers build relevant skills, the skills gap can be bridged.

When designing their reskilling agenda, organizations need to remember to:



RESKILL AT THE TOP

The upper echelons of an organization also need new skills to lead in an era of disruption. They need to understand both business fundamentals and the power of new technologies. Specifically, they need to have the ability to manage horizontal organizations instead of hierarchical ones, demonstrate intellectual curiosity, and go beyond “measurement and management” to inspire creativity and new ways of thinking. They also need to be “digital architects,” equipped with a new set of attributes that enables them to succeed in a disruptive environment.



PROMOTE LEARNING AS A WAY OF LIFE

Today, the process and culture of learning is sequential—from primary and secondary education, through vocational training and higher education to job-specific training. This is no longer the case.

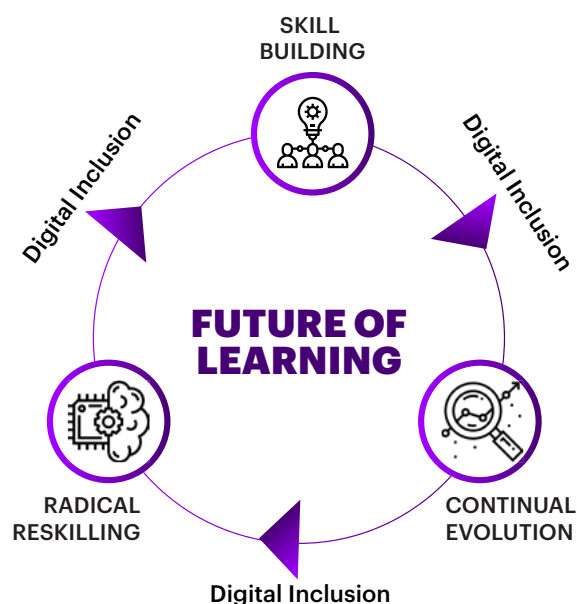
The future of upskilling involves a continuous cycle (see Figure 11) in which digital inclusion is achieved through:

Skill building: Equipping individuals with new skills through practical courses that combine academic and real-world experiences

Continual evolution: Reinforcing and advancing worker capabilities as the business evolves; supporting continuous learning as employees increasingly chart highly varied courses throughout the organization

Radical reskilling: Providing workers new opportunities as existing roles get displaced

Figure 11: The future of upskilling involves a continuous learning cycle.



3. USE DIGITAL TO DRIVE OUTCOMES

Using innovative digital learning methods, pharma companies can maximize training investment at speed and scale. There are a wide range of digital tools that can be paired with workers' learning styles, circumstances and environments, from online courses to wearable technologies that enable real-time learning. What's more, instructors can leverage predictive analytics for real-time student progress information. This would enable them to intervene before a struggling worker falls behind or an advanced worker disengages.



STRENGTHEN THE TALENT PIPELINE

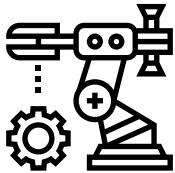
As the need for new skills grows, the talent shortage facing the pharma industry in India will also deepen. While the need for technical skills will continue to be critical, roles at all skill levels will require more than purely technical skills. Take for instance the “new” MR role—it requires creativity, collaboration and business acumen.

The root cause of the skills gap can be traced far back to primary and higher education—skills developed here can become irrelevant before reskilling can even happen. There are many reasons for this: from silos that exist in the talent pipeline to the inflexibility of the education system to change what and how it teaches. As a result, workers are left having to play catch-up with the system.



In fact, between now and 2020, the World Economic Forum (WEF) anticipates a growth in demand for cognitive abilities (52 percent), systems skills (42 percent) and complex problem-solving skills (40 percent).

Given the urgency of the requirement for skilling, we strongly feel that pharma companies in India need to look beyond the constraints of the “pharma experience.” Our research recommends that they focus on:



Exploring ancillary industries

Pharma companies need to be open to looking for talent in related companies that may be ahead vis-à-vis a skill. Interestingly, several companies have already initiated actions on this path. The key skills being looked at include:

Relationship management

Banking, insurance industry

Channel

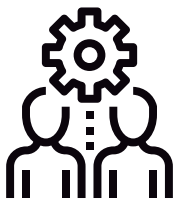
management

FMCG

Market access/KAM

Medical devices

However, such a movement requires cultural sensitivity to ensure that the new worker is well integrated into the pharma organization.



Partnering with the ecosystem

Organizations will create physical and virtual networks to facilitate community building, deliver access to valuable skills training, generate feedback and create access to potential new roles and projects. Ultimately, such ecosystems would allow companies to rapidly tap into new sources of talent when needed.

The startup ecosystem in healthcare is flourishing, with small entrepreneurs being seen as a rich source of innovation. Partnerships with such startups will make rapid scaling-up possible. The ability to work with carefully selected partners can help fill skill gaps in the short term.



Leveraging global capabilities

Skills required in the fields of market access and health economics are nascent in India. Leveraging global experience may be the best way to fill these gaps in the short term. However, given that the India healthcare context is unique, it is imperative that the global experience is provided in collaboration with an Indian domain expert.



Collaborating with academia

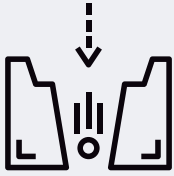
Pharma companies need to influence the academic agenda from the beginning—and not just in pharmacy programs. That includes higher education as well as vocational programs. Leaders need to work with other employers in their sectors to define common skill requirements and actively communicate them to local educational institutions.

CONCLUSION

To pave the way forward to a brighter future, pharma companies need to embrace the future of work, including changing how they are run. Our research found that pharma leaders agree there is work to be done on three key aspects: reimagine the future, accelerate the reskilling of their people and strengthen the talent pipeline from its source. By focusing on these as strategic priorities, leaders will be able to redefine competitiveness and gain an edge for decades to come.



To create a path to greater productivity and innovation via talent, organizations must:



Take stock of change gaps

Many pharma companies have changed dramatically in the recent past. But the workforce and talent practices at many of these firms have not changed in decades. Before going for a transformation, organizations need to first look at their business objectives and then assess how the imminent changes in the industry will impact their organization. Leveraging predictive intelligence will help them understand the skill needs now and over time. From identifying the traits and behaviors that make a successful leader to building a strategic partnership ecosystem, leadership teams must consider how to address the new reality.



Make every leader a digital leader

Reskilling should involve all levels of the organization—from the bottom to the top. Today's leaders need to understand both business fundamentals and the power of new technologies. They also need to be “digital architects,” equipped with a new set of attributes that will enable them to succeed in a disruptive environment.



Cultivate development and reskilling as currency

The war for talent is only going to become fiercer. To that end, training, mentoring, coaching and reskilling will become a currency—as critical as delivering a paycheck—and employers will be differentiated by their ability to deliver against that demand.



Become good stewards of the future

Developing tomorrow's talent needs to be a strategic priority for the business. Pharma companies need to take responsibility for the next generation of workers by collaborating with organizations, academia and governments to identify future talent needs and cultivate the workforce today. Leaders can reach further back into the talent pipeline to reframe education systems themselves by playing an active role in shaping curricula to make it suited to the world of work.

The good news is, human ingenuity and technology can help leaders ready their organizations for growth and innovation. But the pace of change will only accelerate, and leaders must anticipate and act on it just as relentlessly. This starts with developing the future workforce. NOW.

RESEARCH METHODOLOGY

OPPI and Accenture collaborated to write this thought leadership report. We conducted primary interviews with business leaders and chief human resource officers across pharma organizations in India. We augmented the insights with Accenture research on the workforce of the future and business trends. Finally, we held focused discussions with Accenture subject matter experts to plug any gaps and tie loose ends.

The OPPI HR taskforce guided the research team from conceptualization to completion through regular review and feedback sessions.

We would specifically like to thank the following for their valuable inputs through detailed discussions:

Organization Name	Interviewee Name	Designation
AstraZeneca Pharma India Ltd	Gagan Singh Bedi	Managing Director
Bayer Pharmaceuticals Pvt Ltd	Manoj Saxena	Country Division Head–South Asia
Bayer Group of Companies, India	K. S. Harish	Country Group HR Head, South Asia
Boehringer Ingelheim India Pvt Ltd	Sanjay Srivastava	Director–HR
Boehringer Ingelheim India Pvt Ltd	Sharad Tyagi	Managing Director
GlaxoSmithKline Pharmaceuticals Ltd	Annaswamy Vaidheesh	Vice President, South Asia & Managing Director, India
GlaxoSmithKline Pharmaceuticals Ltd	Meenakshi Priyam	Executive VP–HR
Glenmark	Sujesh Vasudevan	President–India Formulations, Middle East & Africa
Industry Expert	Deep Bhandari	Executive Coach & Consultant
MSD Pharmaceuticals Pvt Ltd	Vivek Kamath	AVP & Managing Director
MSD Pharmaceuticals Pvt Ltd	Sameer Tamhane	Sr. Director–HR
Nestlé Skin Health India Pvt Ltd	G. Sathya Narayanan	Managing Director, South Asia
Nestlé Skin Health India Pvt Ltd	Abhigyan Ghosh	Head–HR
Novartis India Ltd	Savitha Shivsankar	Country Head–HR
Novo Nordisk India Pvt Ltd	Melvin D’Souza	Corporate Vice President & General Manager
Roche Products (India) Pvt Ltd	Swati Yadav	Director–HR
Sanofi India Ltd	Gaurav Bahadur	Sr. Director–HR
Serdia Pharmaceuticals (India) Pvt Ltd	Georges Jabre	Chief Executive Officer
Takeda Pharmaceuticals India Pvt Ltd	Ashok Bhattacharya	Executive Director/Country Manager

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ABOUT OPPI

The Organisation of Pharmaceutical Producers of India (OPPI) was established 50 years ago and represents the research-based pharmaceutical companies in India. OPPI remains committed to supporting the nation's healthcare objectives and collaborating with all stakeholders to find sustainable solutions. OPPI believes the need for innovation must be balanced with the necessity for more accessible medicines, within a robust IP environment. A holistic approach is needed to expand healthcare in India and OPPI believes the pharmaceutical industry can form part of the solution.

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 459,000 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.

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