

INSEAD Healthcare

Alumni Summit 2009

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 **MSD**

How to use the keypad?



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1. **Press on the key of your choice**
2. **Press “OK” to send the vote**

Are you affiliated with INSEAD?



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1 - Yes (alumnus / attended courses / faculty or staff)

2 - No



Are you affiliated with INSEAD?



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1 - Yes (alumnus / attended courses / faculty or staff)



2 - No



In which sector do you work?



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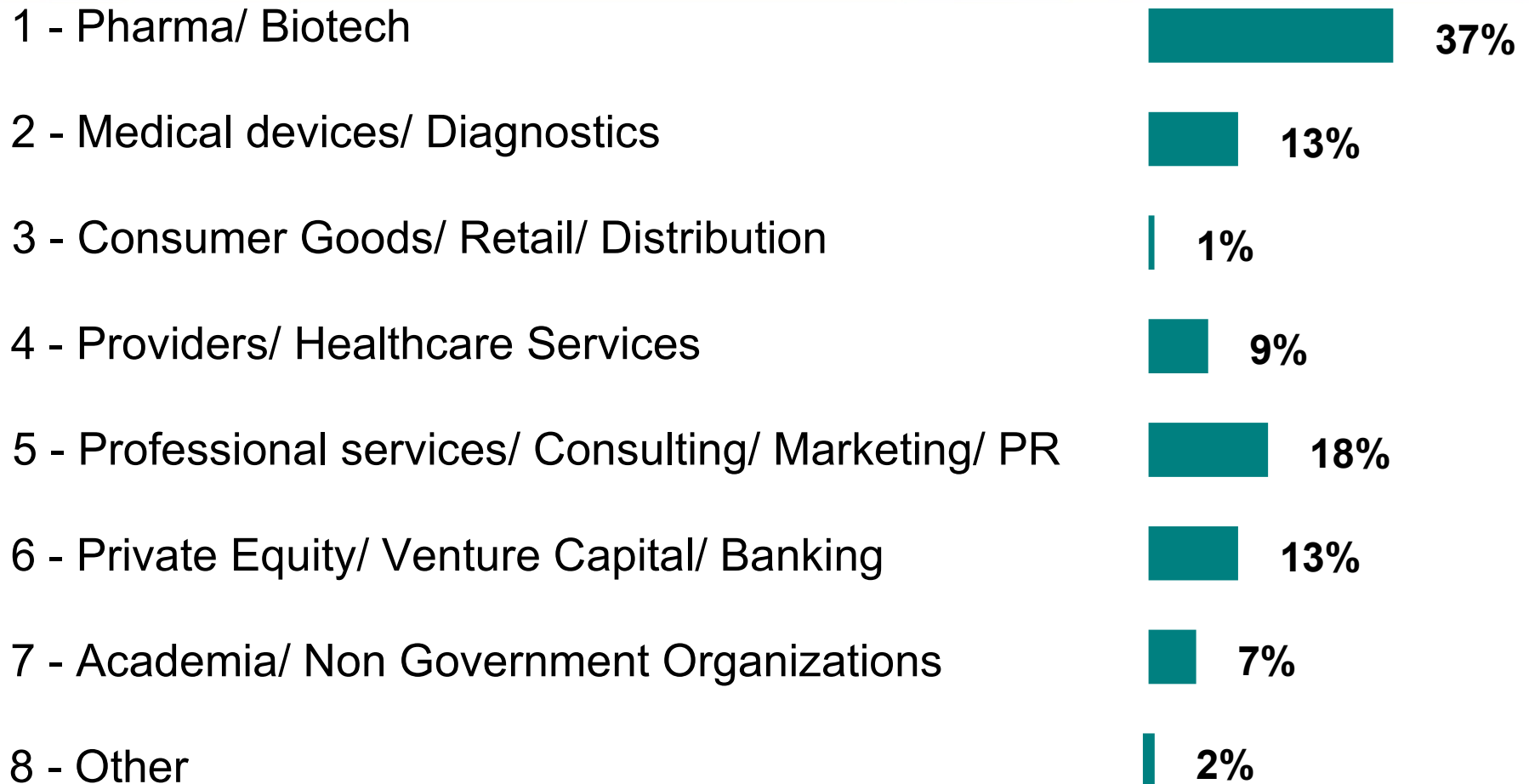
- 1 - Pharma/ Biotech
- 2 - Medical devices/ Diagnostics
- 3 - Consumer Goods/ Retail/ Distribution
- 4 - Providers/ Healthcare Services
- 5 - Professional services/ Consulting/ Marketing/ PR
- 6 - Private Equity/ Venture Capital/ Banking
- 7 - Academia/ Non Government Organizations
- 8 - Other



In which sector do you work?



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How many employees does your organization have?



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- 1 - 1-10 employees
- 2 - 11-100 employees
- 3 - 101-1,000 employees
- 4 - 1,001-10,000 employees
- 5 - More than 10,000 employees



How many employees does your organization have?



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What is the geographic scope of your organization's activities?



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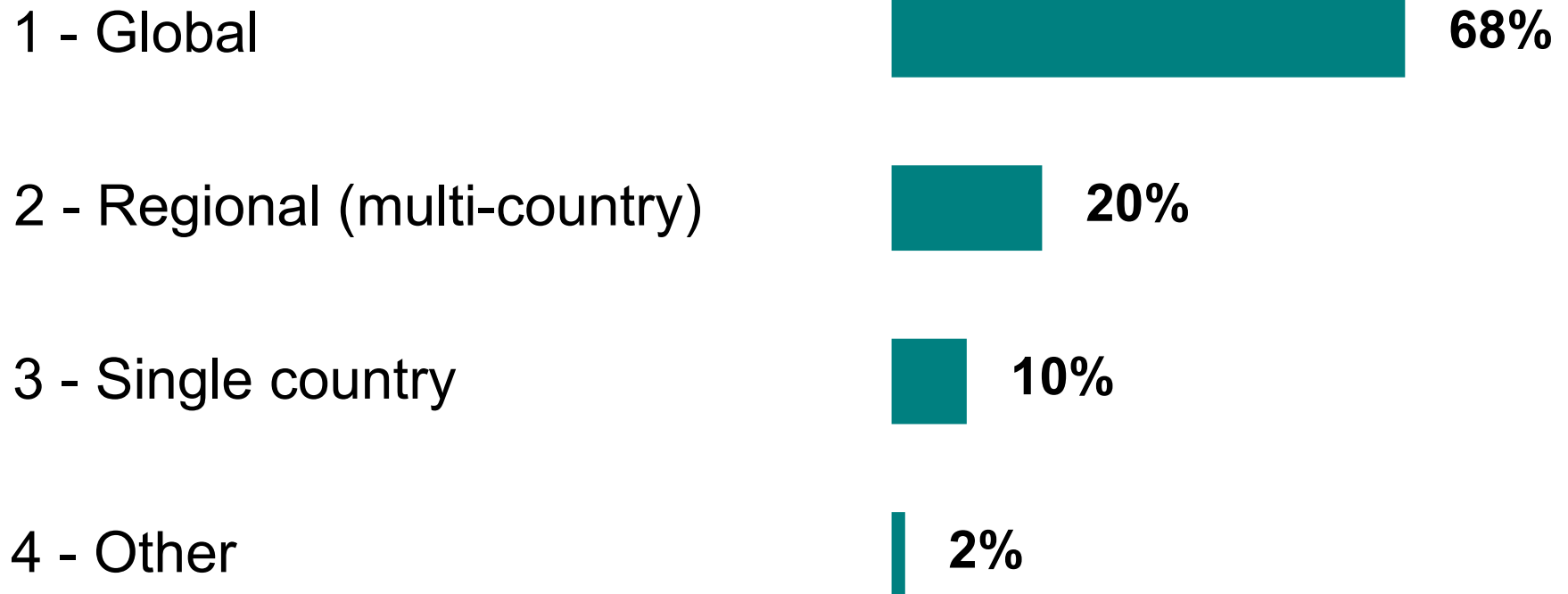
- 1 - Global
- 2 - Regional (multi-country)
- 3 - Single country
- 4 - Other



What is the geographic scope of your organization's activities?



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What is your main geographic responsibility?



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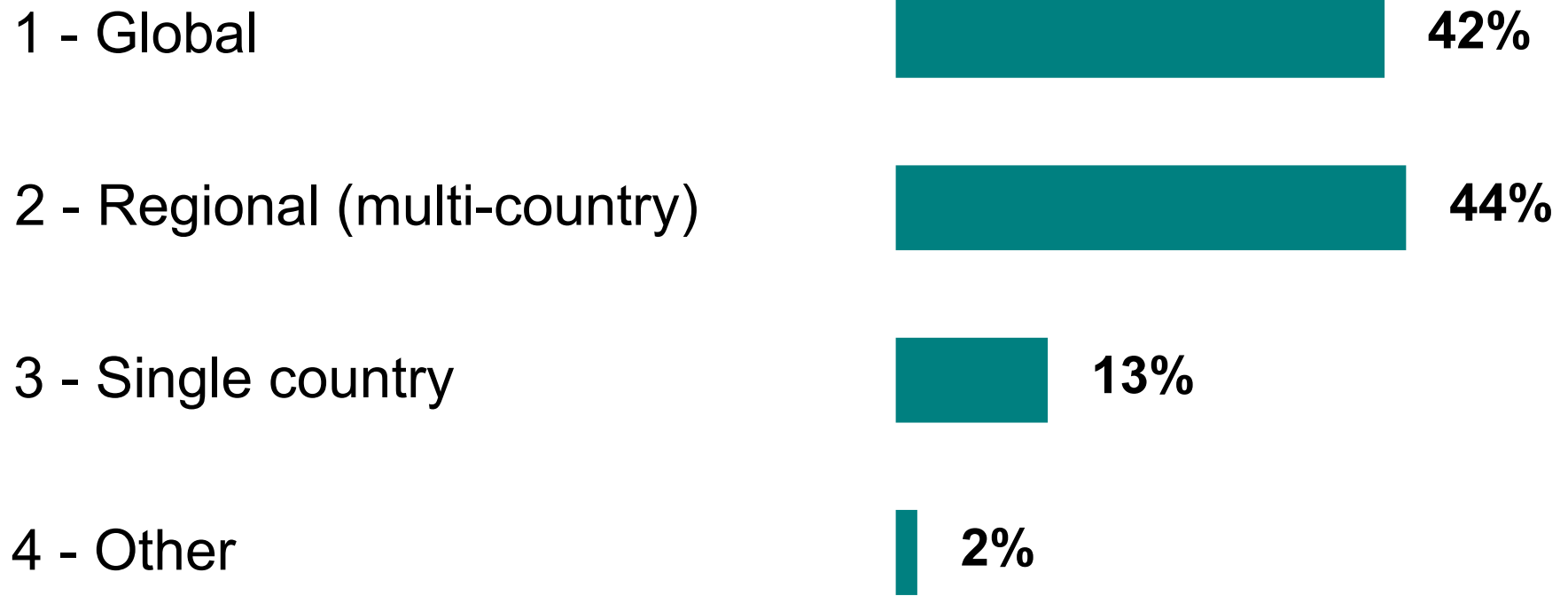
- 1 - Global
- 2 - Regional (multi-country)
- 3 - Single country
- 4 - Other



What is your main geographic responsibility?



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Innovation session – 10.20 to 12.00

Which strategy do you consider to be the most promising one for successful innovation?



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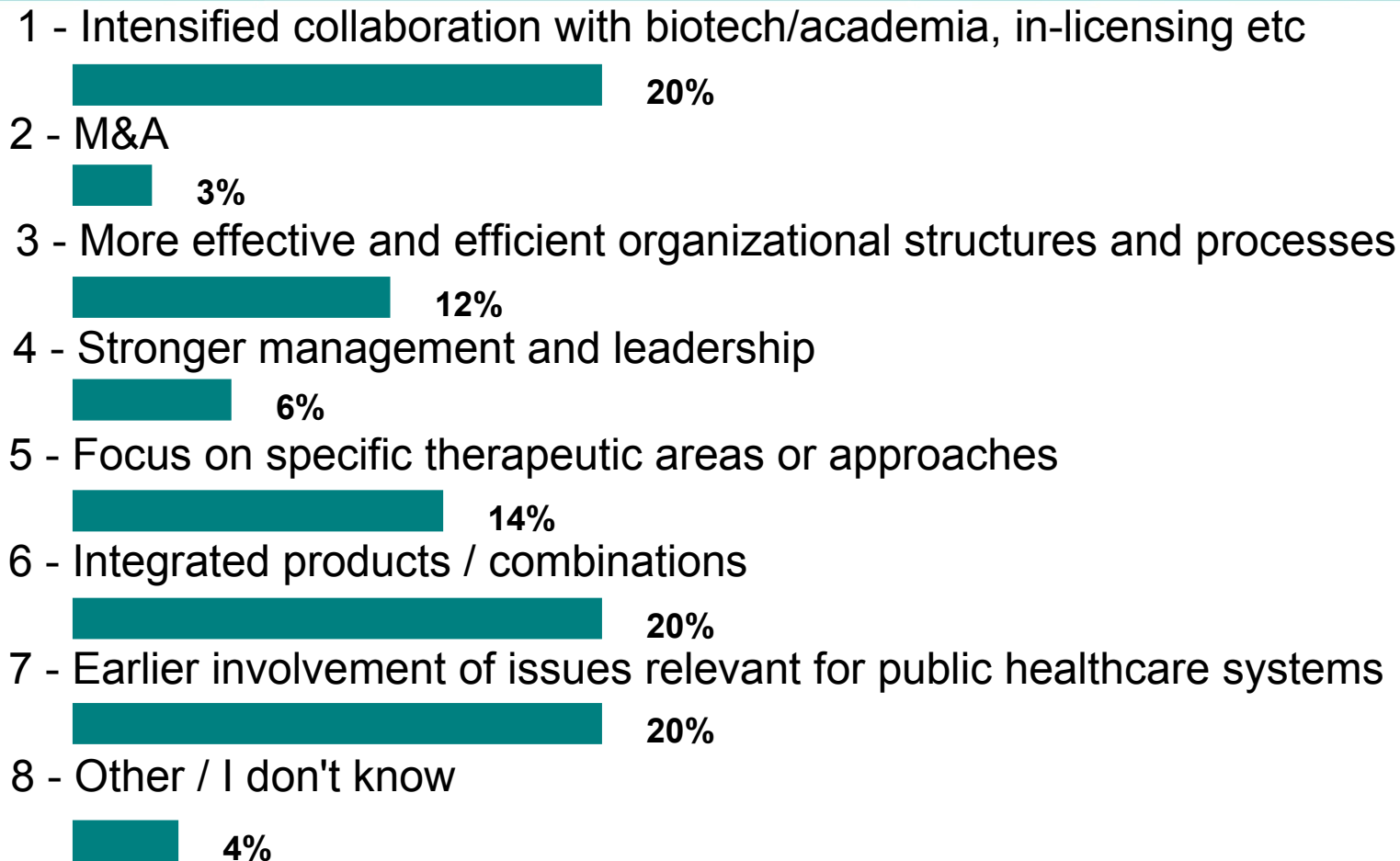
- 1 - Intensified collaboration with biotech/academia, in-licensing etc
- 2 - M&A
- 3 - More effective and efficient organizational structures and processes
- 4 - Stronger management and leadership
- 5 - Focus on specific therapeutic areas or approaches, such as biologics, stem cell therapies, personalized medicines, etc.
- 6 - Integrated products, such as combinations of pharmaceutical and diagnostic/medical devices products
- 7 - Earlier involvement of issues relevant for public healthcare systems, such as health outcomes, pharmaco-economics, etc.
- 8 - Other / I don't know



Which strategy do you consider to be the most promising one for successful innovation?



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To what extent do you feel the R&D model of the pharma industry is in danger?



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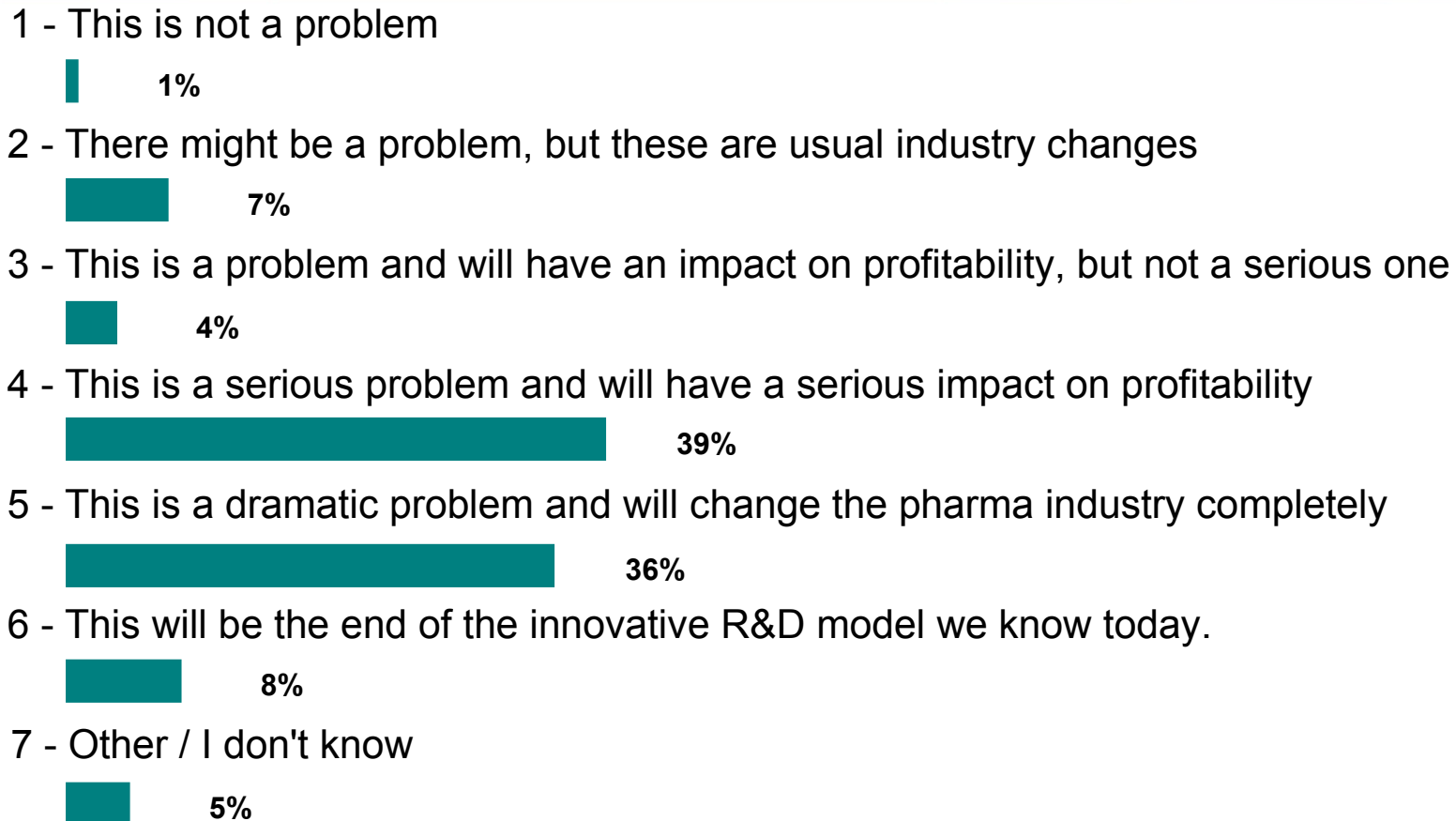
- 1 - This is not a problem
- 2 - There might be a problem, but these are usual industry changes and the pharma industry will find adequate answers to maintain profitability
- 3 - This is a problem and will have an impact on profitability, but not a serious one
- 4 - This is a serious problem and will have a serious impact on profitability, but the pharma industry will still remain more profitable than other industries
- 5 - This is a dramatic problem and will change the pharma industry completely, leading to a profit situation comparable to other mature industries such as automotive suppliers etc.
- 6 - This will be the end of the innovative R&D model we know today. Innovation will be limited to specific issues of exceptional interest to public welfare or will be handled by public-private partnerships
- 7 - Other / I don't know



To what extent do you feel the R&D model of the pharma industry is in danger?



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Which therapeutic area do you think will be of main strategic interest to the pharma industry in the coming years?



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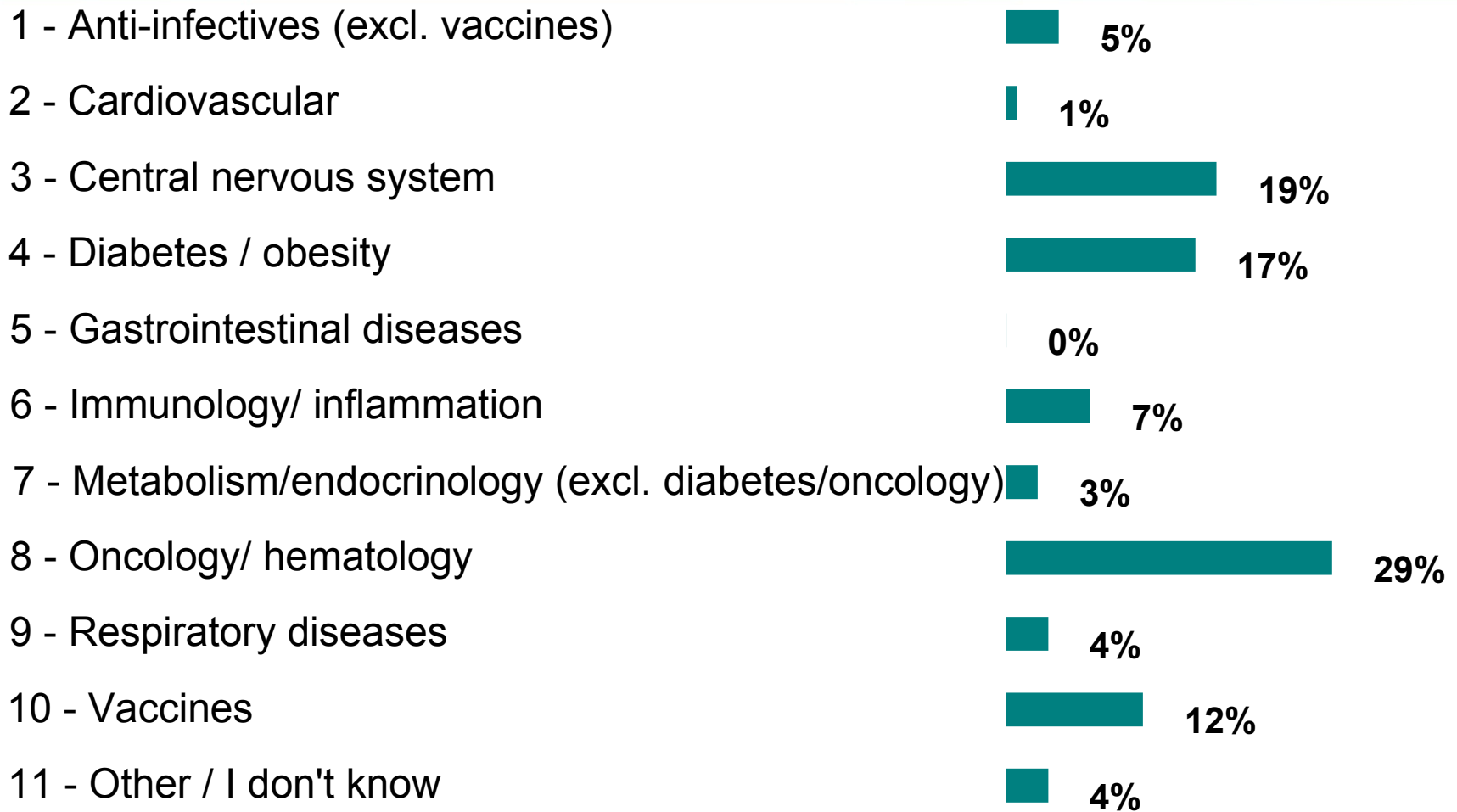
- 1 - Anti-infectives (excl. vaccines)
- 2 - Cardiovascular
- 3 - Central nervous system
- 4 - Diabetes / obesity
- 5 - Gastrointestinal diseases
- 6 - Immunology/ inflammation
- 7 - Metabolism/endocrinology (excl. diabetes/oncology)
- 8 - Oncology/ hematology
- 9 - Respiratory diseases
- 10 - Vaccines
- 11 - Other / I don't know



Which therapeutic area do you think will be of main strategic interest to the pharma industry in the coming years?



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Which therapeutic approach will be the most important one in the next 5-10 years?



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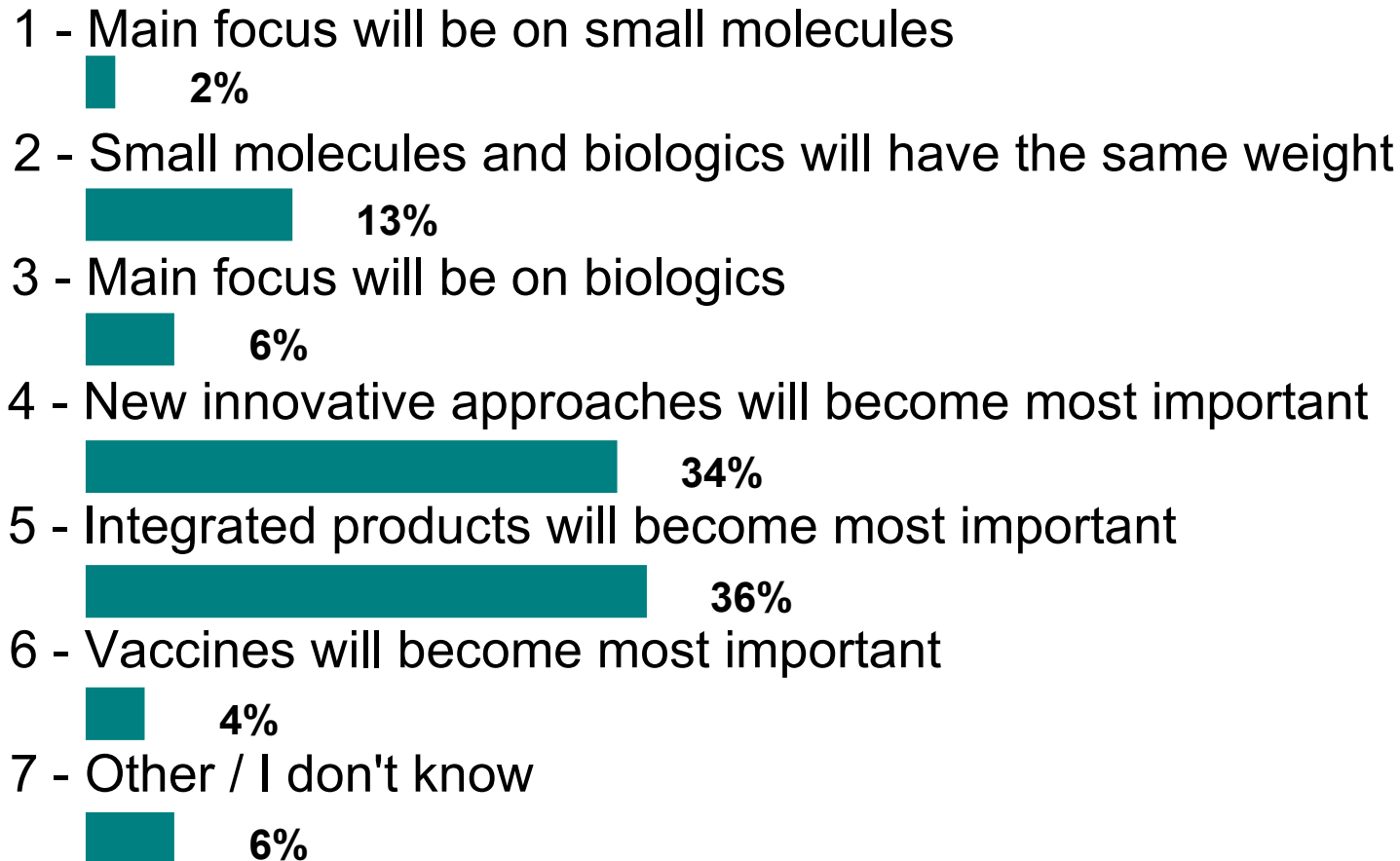
- 1 - Main focus will be on small molecules
- 2 - Small molecules and biologics will have the same weight
- 3 - Main focus will be on biologics
- 4 - New innovative approaches will become most important, such as stem cell therapeutics, gene therapy, peptide-based therapeutics, RNA-based therapeutics, personalized medicine, etc
- 5 - Integrated products will become most important, such as combinations of pharmaceutical and diagnostic/medical devices products
- 6 - Vaccines will become most important
- 7 - Other / I don't know



Which therapeutic approach will be the most important one in the next 5-10 years?



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Which type of organization will be the most important driver of healthcare innovation 10 years from now?



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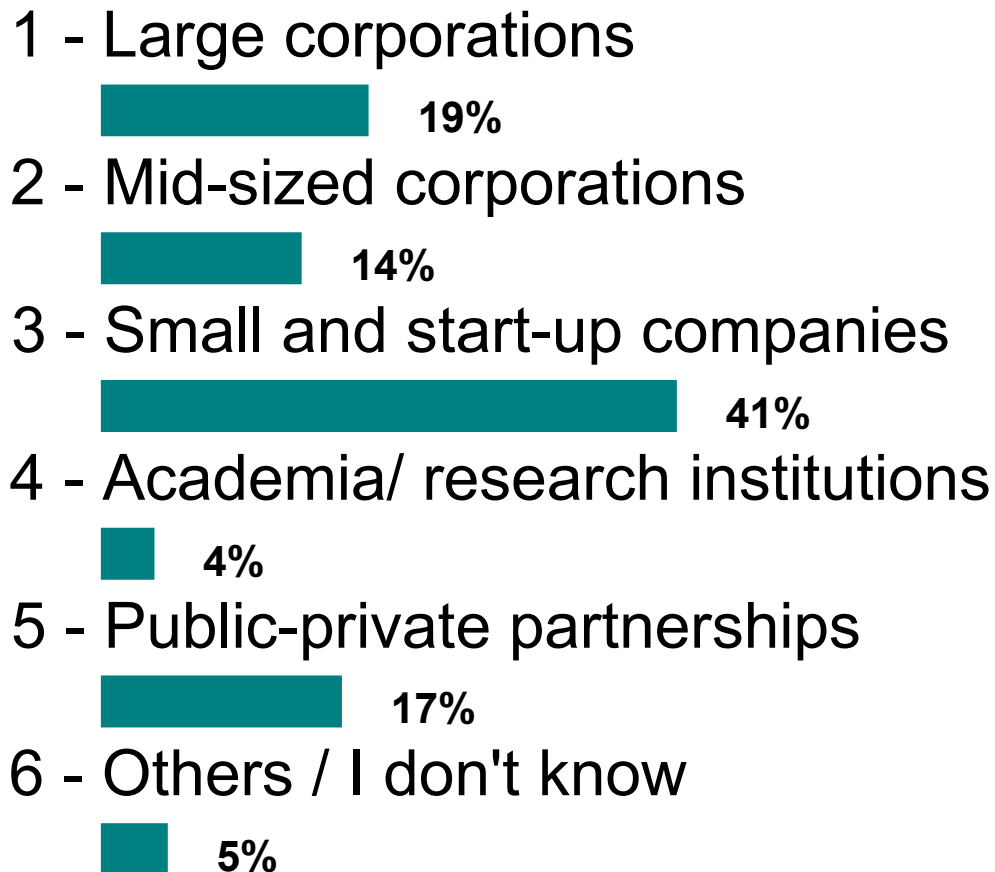
- 1 - Large corporations
- 2 - Mid-sized corporations
- 3 - Small and start-up companies
- 4 - Academia/ research institutions
- 5 - Public-private partnerships
- 6 - Others / I don't know



Which type of organization will be the most important driver of healthcare innovation 10 years from now?



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**Consumer Healthcare session – 13.00 to
14.40**

Will Google, Youtube and Twitter help consumers become the masters of their destiny and therefore of healthcare?



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1 - Yes, very much so

2 - Yes, a little

3 - I don't know

4 - No, probably not

5 - Definitely not



Will Google, Youtube and Twitter help consumers become the masters of their destiny and therefore of healthcare?



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1 - Yes, very much so



2 - Yes, a little



3 - I don't know



4 - No, probably not



5 - Definitely not



Do current specialists underestimate the power of the consumerist changes ahead of us?



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1 - Yes, very much so

2 - Yes, a little

3 - I don't know

4 - No, probably not

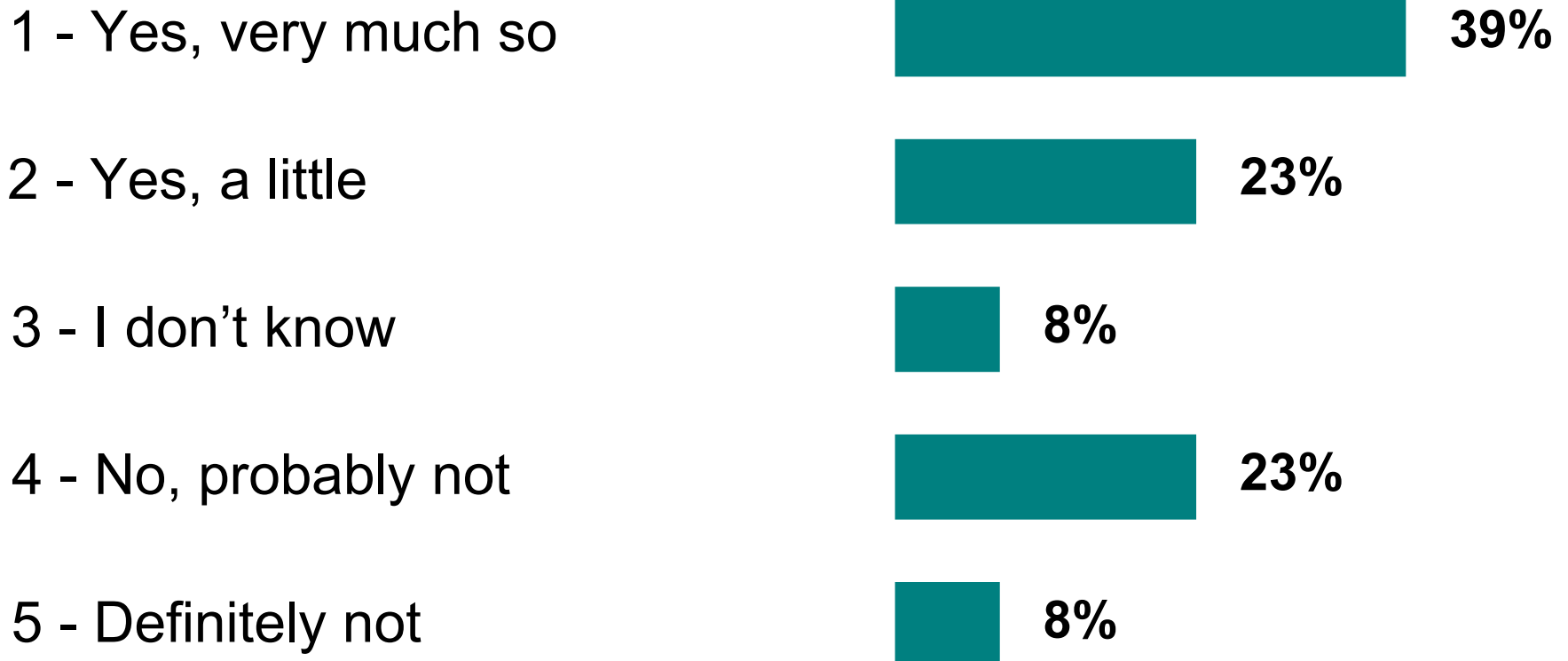
5 - Definitely not



Do current specialists underestimate the power of the consumerist changes ahead of us?



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Which panelist's company will profit most from the changes like personalization and consumerism?



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1 - Elizabeth Izard Apelles, CEO, GreaterThanOne

2 - Guy P. Eiferman, SVP & Managing Director France, Merck & Co.

3 - Klaus Gritschneider, Member of the Management Board, Europa Apotheek Venlo

4 - Dr. Flemming Ornskov, President Global Pharmaceuticals, Bausch & Lomb



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Which change will impact healthcare most



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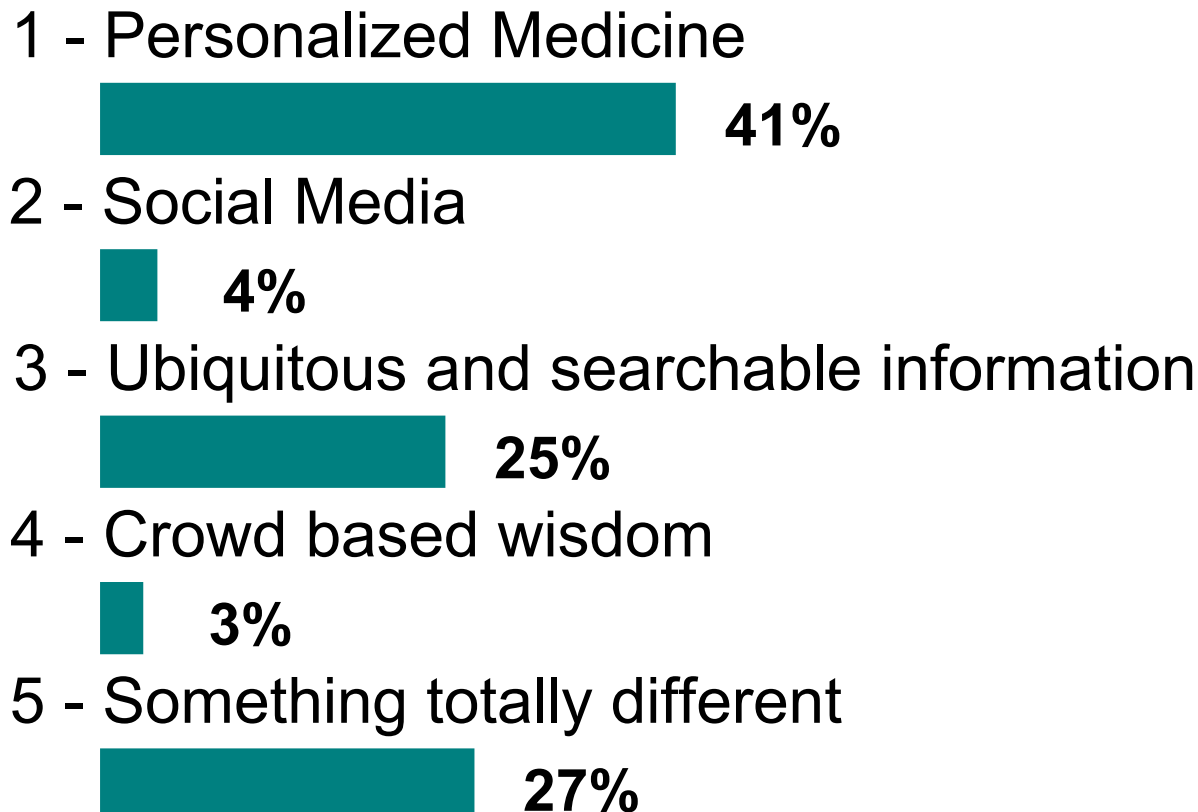
- 1 - Personalized Medicine
- 2 - Social Media
- 3 - Ubiquitous and searchable information
- 4 - Crowd based wisdom
- 5 - Something totally different



Which change will impact healthcare most



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Who will be the most potent player in healthcare in the future?



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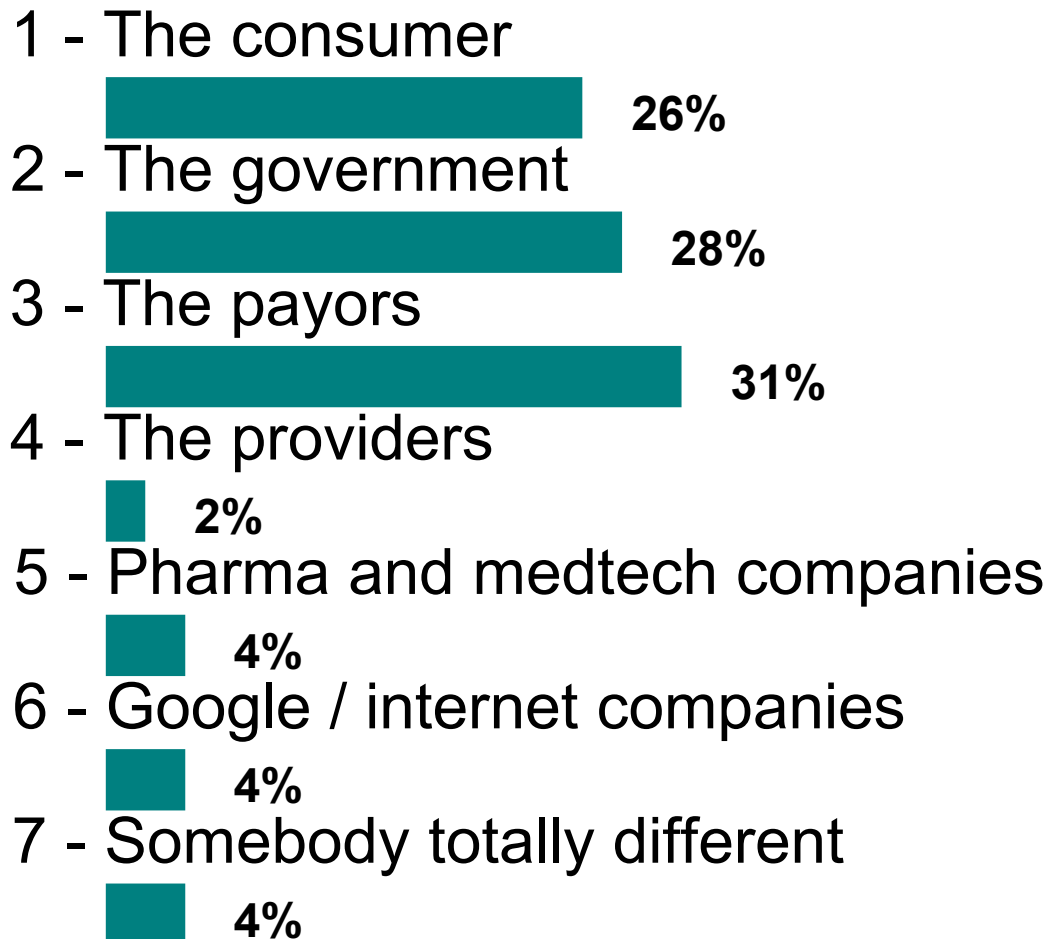
- 1 - The consumer
- 2 - The government
- 3 - The payors
- 4 - The providers
- 5 - Pharma and medtech companies
- 6 - Google / internet companies
- 7 - Somebody totally different



Who will be the most potent player in healthcare in the future?



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Globalization session – 15.00 to 16.40

Which geographic market is most important for your sector today?



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1 - US

2 - Europe

3 - Japan

4 - BRIC – Brazil, Russia, India, China

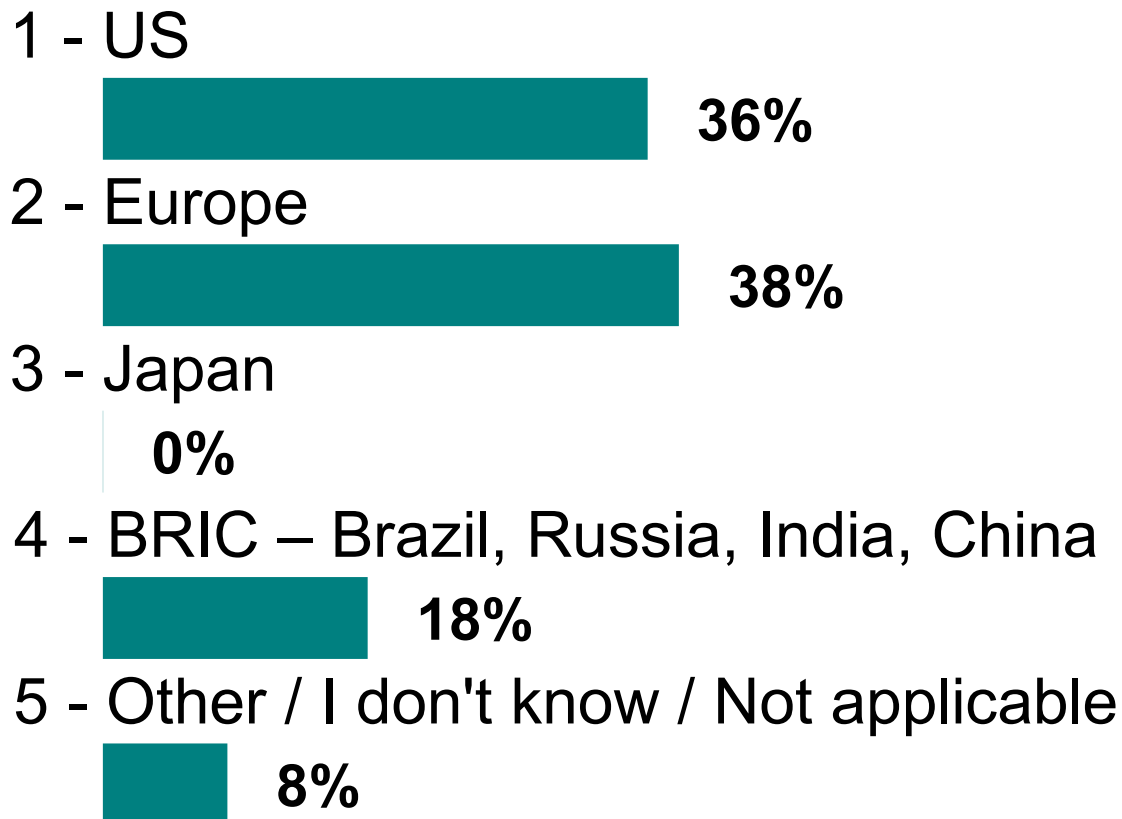
5 - Other / I don't know / Not applicable



Which geographic market is most important for your sector today?



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Which geographic market do you consider as most attractive by 2020 for your sector?



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1 - US

2 - Europe

3 - Japan

4 - BRIC – Brazil, Russia, India, China

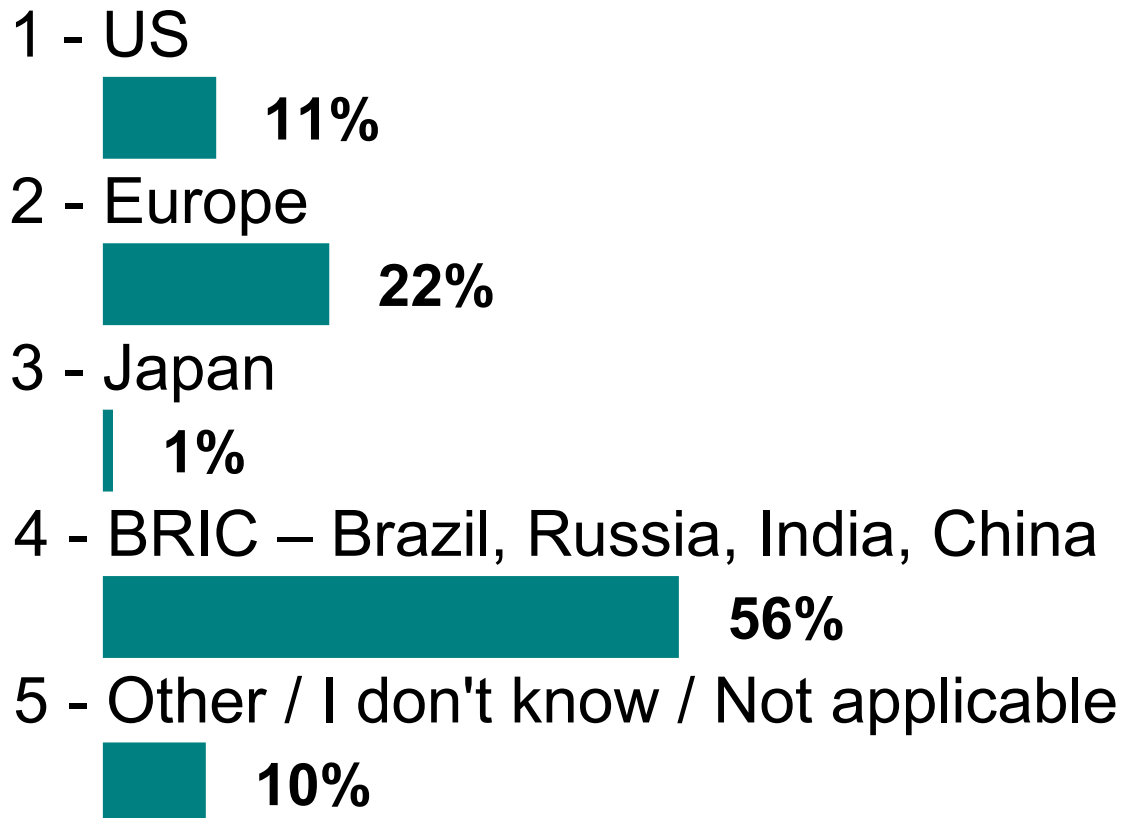
5 - Other / I don't know / Not applicable



Which geographic market do you consider as most attractive by 2020 for your sector?



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Where would you found a healthcare business today



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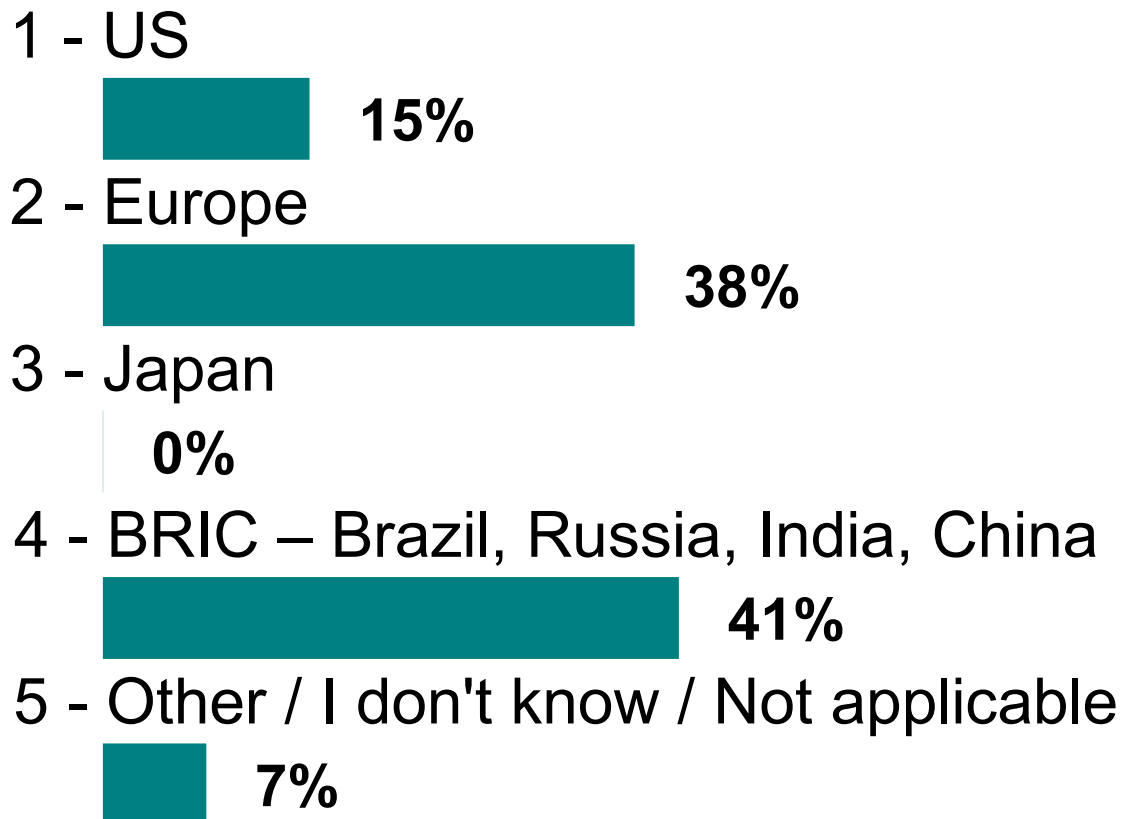
- 1 - US
- 2 - Europe
- 3 - Japan
- 4 - BRIC – Brazil, Russia, India, China
- 5 - Other / I don't know / Not applicable



Where would you found a healthcare business today



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Would you outsource healthcare/life sciences services to India?



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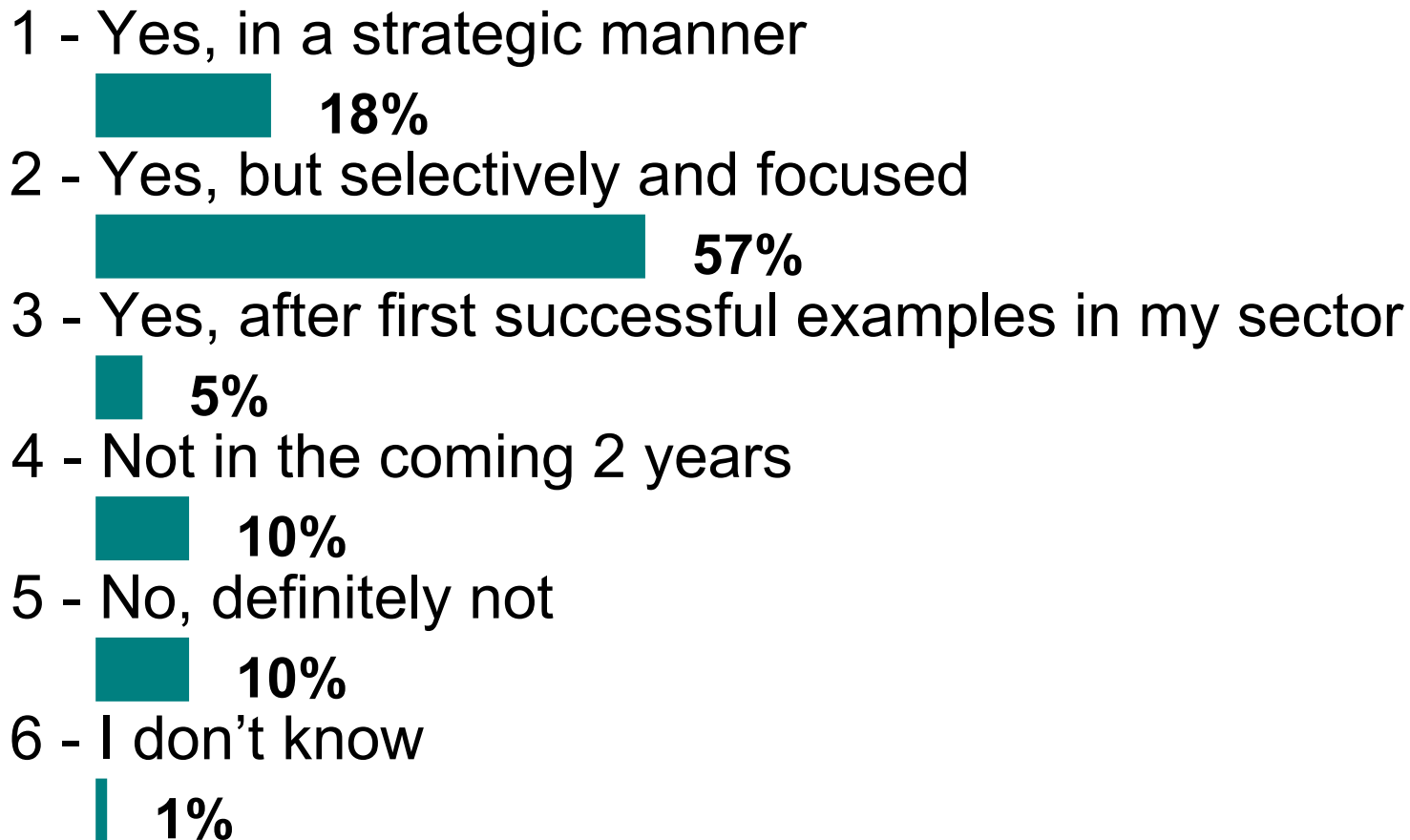
- 1 - Yes, in a strategic manner
- 2 - Yes, but selectively and focused
- 3 - Yes, after first successful examples in my sector
- 4 - Not in the coming 2 years
- 5 - No, definitely not
- 6 - I don't know



Would you outsource healthcare/life sciences services to India?



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Where will the globally leading healthcare providers come from by 2020?



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1 - US

2 - Europe

3 - Japan

4 - BRIC – Brazil, Russia, India, China

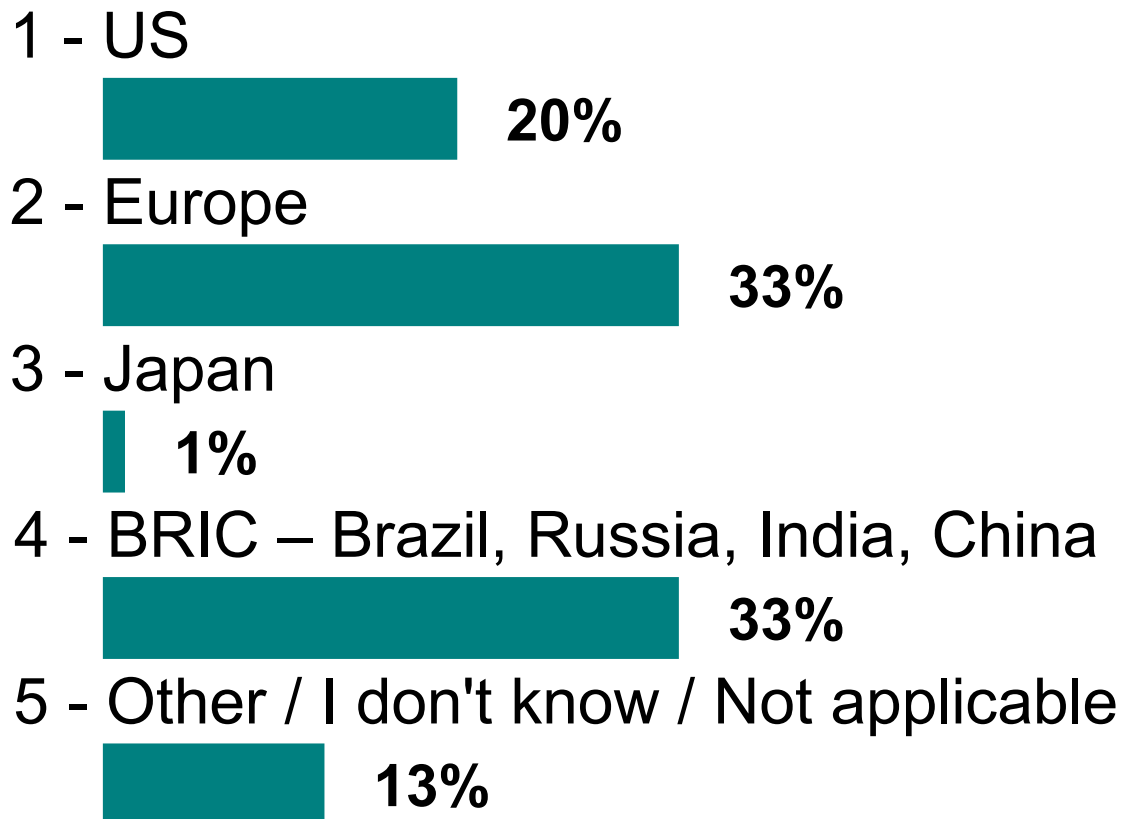
5 - Other / I don't know / Not applicable



Where will the globally leading healthcare providers come from by 2020?



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Which globalization trend will most shape healthcare by 2020?



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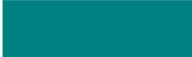
- 1 - Large fraction of absolute growth will come from Emerging Markets
- 2 - China/India will have the largest patient pools in many important diseases
- 3 - Patients will seek for best care globally, starting in highly regulated areas first
- 4 - Developed countries will source significant part of healthcare staff from migration
- 5 - Healthcare providers will consolidate specialty disease areas on a global basis
- 6 - Healthcare value chain specialists will outsize the largest captive providers, e.g. CROs, teleradiology services providers
- 7 - Other / I don't know



Which globalization trend will most shape healthcare by 2020?



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- 1 - Large fraction of absolute growth will come from Emerging Markets
 **23%**
- 2 - China/India will have the largest patient pools in many important diseases
 **26%**
- 3 - Patients will seek for best care globally, starting in highly regulated areas first
 **9%**
- 4 - Developed countries will source significant part of healthcare staff from migration
 **4%**
- 5 - Healthcare providers will consolidate specialty disease areas on a global basis
 **16%**
- 6 - Healthcare value chain specialists will outsize the largest captive providers
 **12%**
- 7 - Other / I don't know
 **10%**