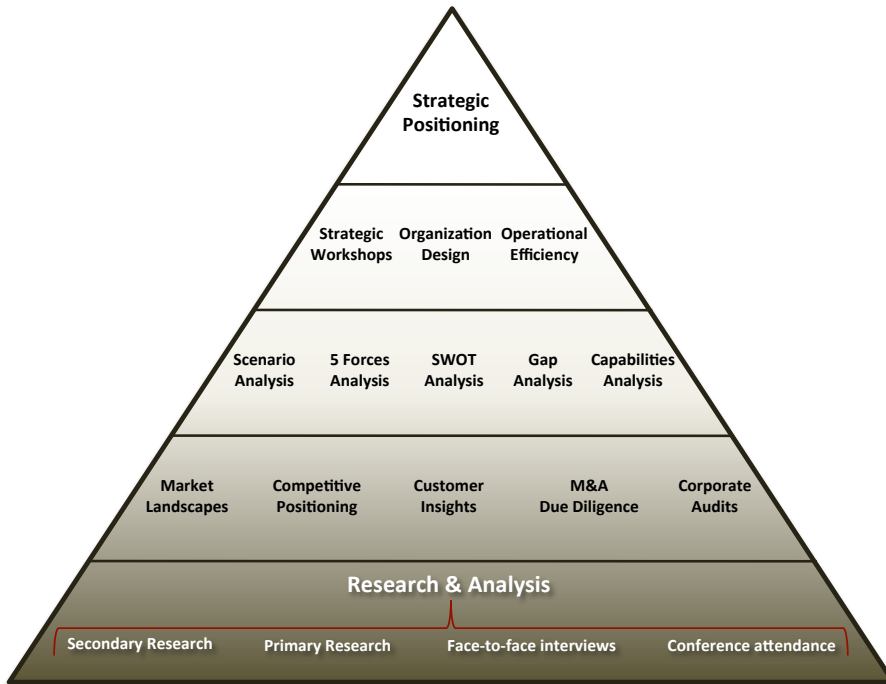




Introduction

ABE Associates Ltd [ABE] is a global strategic consulting firm that helps companies optimize their strategic position through evidence-based research and analysis. ABE was founded in 2006 by former blue-chip strategy consultants with deep industry knowledge and a multi-lingual network of research analysts. We have worked for a range of global clients, including Tier 1 and 2 Pharmaceutical companies, API manufacturers and medical device vendors.

Services



Life sciences experience

Therapy areas

- Oncology
- Endocrinology
- Respiratory
- Cardiovascular
- Gastroenterology
- Surgical
- CNS / Neurology
- Immunology
- Infectious Diseases
- Women's Health
- Hepatology
- Blood cancers

Types of projects

- Generics and biosimilars development
- OTC vs prescription
- Clinical trial development status
- Drug launch and marketing strategy
- New market entry strategy
- Supply chain logistics
- Medical device development
- Brand planning – situation analysis
- Regulatory strategy
- Sales force sizing and optimization



Global coverage





ABE has been conducting studies within life sciences since the early 90's, spanning corporate strategy, sales force sizing and optimization, portfolio planning, market entry strategy, competitive positioning, regulatory strategy and clinical trial status, as well as war gaming and scenario analysis. The following represent a small sample of our projects:

Case Study – Market overview & competitive landscape within Multiple Sclerosis

The Challenge: Develop an on-going global understanding of the key developments within MS treatment

▪The client, a serious contender within Multiple Sclerosis, wanted to evaluate the progress of competing MS treatments by reviewing their efficacy and safety profiles, as well as obtaining opinions from industry experts and KOLs. ABE were required to monitor and report on any breaking news, as well as attend ECTRIMS, ACTRIMS and AAN annually to provide comprehensive conference reports

Activities and Outcome:

▪ABE conducted a comprehensive review of the current treatment landscape, and initiated a global study to interview KOLs, company sources, financial analysts and other industry experts to obtain their views on the different MS treatments being developed
▪These findings were combined with attendance at MS-related conferences to corroborate and validate intelligence regarding filing and launch timelines, efficacy, safety and tolerability performance and general views on progress within the MS indication. Our regular reports enabled the client to keep track of the MS treatment landscape and adjust their marketing messages based on KOLs' views of their own drug relative to others

Case Study – Global review of biosimilars within the inflammation landscape

The Challenge: Global tracking of trial status and drug development for a range of biosimilars

▪In the highly competitive world of biosimilar development, our client needed to understand the global clinical trial and patient recruitment status of several competitor biosimilars for rheumatoid arthritis and other inflammation indications. In addition, ABE were required to establish the key issues in acquiring patients, such as lack of awareness, concern over biosimilars or low numbers of patients suitable for the trials. The main objective was to understand the challenges faced by companies in designing global trials for biosimilar development

Activities and Outcome:

▪ABE identified the global trial sites through secondary and primary research, and conducted interviews with principal investigators, trial coordinators and nurses as well as financial analysts, to understand the recruitment status and issues with acquiring suitable patients
▪The research provided valuable insight into how the trials were progressing, what issues each company was facing in marketing to physicians and hospitals and in acquiring suitable patients that met the inclusion criteria, as well as an understanding of the hurdles in meeting biosimilar regulatory guidelines

Case Study – War game to plan for different product launch scenarios

The Challenge: Develop a go-to-market and market access strategy in a highly competitive environment

▪Our client, the European headquarters of a global pharmaceutical company, was about to launch a new monoclonal antibody in a highly-competitive market. Several competitors were about to bring similar or alternative products to the market within a short time period of our client's planned launch, and so our client required a series of war games to assess multiple scenarios, with special focus on one competitor which was several months ahead

Activities and Outcome:

▪ ABE was tasked to help the client determine its go-to-market strategy in terms of sales force and medical field force deployment; primary visiting targets identification; and messaging. We also helped assess the client's market access strategies in terms of pricing, payor strategy, and patient support.
▪ ABE prepared and facilitated a series of two-day strategy workshops during which the client put on their main competitor's hats in order to evaluate their competition's most likely GTM and market access strategies; based on the findings we then developed the client's optimal strategy in order to counter all potential future threats to their new product. After each workshop ABE delivered an in-depth analysis of the findings and a detailed strategy plan.

Case Study – Establishing internal CI and Counter-Intelligence capability

The Challenge: Establish internal Competitive intelligence capabilities for a global healthcare company

▪The client was concerned about the lack of internal intelligence resources and capabilities and needed to establish a robust framework to gather and disseminate intelligence about their competitors and markets to key personnel with the company.
▪In addition, ABE was required to provide 'Counter Intelligence' training to their staff, enabling them to become aware of potential external CI activities

Activities and Outcome:

▪ABE conducted an initial audit and gap analysis of the client's CI capabilities, including interviews with key stakeholders throughout the organisation to assess whether their intelligence needs were being met.
▪An intelligence framework was developed and implemented, resulting in additional resources – full-time and part-time – and new processes which improved the flow of information using the client's Intranet
▪ABE also conducted training workshops to explain how competitors could acquire information about them, and how to prevent leaks occurring.

Contact ABE



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Case Study – Market entry strategy for Subsequent Entry Biologics

The Challenge: Understand the market entry strategy into Canada for new SEBs

- The client, a prominent Indian manufacturer of biosimilars, wanted to understand the process of gaining approval and entry of Subsequent Entry Biologics [SEBs] into Canada, as well as the opinions of KOLs, physicians and patient organisations on the acceptance of SEBs vs conventional drugs.
- The objective was to provide a market entry strategy report to prepare the client for SEB launch

Activities and Outcome:

- ABE conducted a comprehensive review of secondary sources to establish the key guidelines and structure of Canada's healthcare regulatory system plus identifying the main sources within the different provinces in primary care to interview
- ABE interviewed a range of sources within the Canadian regulatory environment, physicians, nurses and patient group to understand the general acceptance of SEBS, the likely launch time frames and potential hurdles facing biologic companies wanting to enter Canada
- The client was impressed by the level of detail and clarity in the findings, and adjusted their development programme accordingly

Case Study – Investigating a new technology for a medical device

The Challenge: Research an announced but yet unspecified new technology for a medical device

- The main competitor of our client, the medical devices division of a global healthcare company, announced at a trade conference that they would launch one of their key products with a "revolutionary new", but as of yet unspecified technology. Our client was interested in learning as much as possible about this new technology and the competitor's commercial plans for it prior to its market launch.

Activities and Outcome:

- ABE conducted a deep-dive competitive study, talking to all potential stakeholders. Based on these widely-cast primary research interviews, ABE was able to provide our client with an outlook on the technology the client's competitor was about to launch and on their commercial launch plans (including messaging and sales force line-up).
- ABE's client was able to anticipate an important change in the market place and adapt their own product, marketing, and sales strategy accordingly.
- *[Please note that all of ABE's competitive studies are strictly adhering to the SCIP Code of Ethics for CI Professionals.]*

Case Study – Global reimbursement market analysis for a medical device

The Challenge: An in-depth analysis of the reimbursement process for a medical device in key markets in Europe and the Americas

- ABE's client, the medical devices division of a global healthcare company, was about to launch a new type of medical device. They wanted to understand how the reimbursement process works in key countries in Europe and the Americas.

Activities and Outcome:

- ABE conducted an in-depth study using secondary and primary research in five different countries to understand the existing reimbursement process. During the course of this study, ABE also identified the key stakeholders in each country, and included a forward-looking analysis to evaluate whether the new device about to be launched by ABE's client could potentially change the reimbursement process.
- For each of the target countries, ABE delivered a step-by-step reimbursement process workflow to the client, pointing out all potential pitfalls and suggesting possible solutions to avoid delays. The client was able to plan its reimbursement strategy ahead of the product launch, and anticipate certain issues and adapt their product accordingly.

Case Study – Conference attendance for multiple indications

The Challenge: Understand the status of new drug development and opinions from KOLs and company sources

- Clients often need to attend medical conferences to review the latest treatments and results from clinical trials, as well as get an overview of what medical professionals think of each drug and competing company.
- In addition, conferences provide the opportunity to view competitors' booths and marketing messages, as well as understand their development pipeline.

Activities and Outcome:

- ABE has attended many conferences, such as ASCO, ESMO, EULAR, ELCC, ESC, EHA, ADA, EASD, ECTRIMS, ACTRIMS, AAN plus many more.
- In each case we have prepared a conference planner to identify which sessions to attend and key sources to interview, attended keynote symposiums and educational sessions to provide notes of the lectures plus pictures of key slides, and finally delivered a conference report summarizing the findings.
- During each conference, ABE is in regular communication with our clients, providing daily updates, meeting with the client sponsor and adjusting our research based on feedback from the client. These projects are often following up with further research based on the foundation of intelligence gathered.

Contact ABE