

• There is a growing trend towards stronger localisation, driven largely by global supply chain risks and disruptions •

October 1, 2026 | Opinion | By Narayan Kulkarni

Switzerland-based Tenthpin Management Consultants is expanding its Asia-Pacific footprint with India emerging as an important technology and talent hub for its global life sciences transformation business. With an established presence in Japan and a new Innovation Hub in Bengaluru focused on advanced therapies and digital transformation, the company is looking to connect capabilities across Asia while maintaining a globally integrated delivery model. In this interaction with BioSpectrum Asia, Michael Schmidt, Founder and Member of the Executive Board, Tenthpin, discusses how India and Japan fit into the company's APAC strategy, the role of SAP in market expansion, opportunities across advanced therapies and CDMOs, its approach to China, and why partnerships will be critical in navigating an increasingly localised and fragmented life sciences landscape.



How do you see the relationship between Tenthpin's India Innovation Hub and its established Japan operations, particularly within your APAC strategy?

We operate as a global company, with one global profit and loss structure and international teams working for international clients. At the same time, there are important market-specific differences.

Japan and India could hardly be more different from a cultural perspective and in terms of how businesses are established and operated. In Japan, many of the large corporations we work with are increasingly looking to grow internationally. They are hiring talent from outside Japan, moving functions overseas and transforming from locally focused businesses into truly global corporations. That creates a significant transformation agenda where we support them.

India, meanwhile, has been developing its own identity as a life sciences powerhouse. It may have started with production, particularly in the active pharmaceutical ingredient space for manufacturers outside India, but an enormous amount has changed over the last 10 to 15 years.

India and Japan will therefore collaborate in the same way that Germany and India, or the UK and the US, collaborate within our global network. Our clients operate across borders; decisions may be taken in one country while the actual work is delivered from another.

Asia-Pacific is clearly a growth market for us. We are currently developing our APAC growth strategy, including determining from which locations we can best serve individual countries. Singapore has developed a strong ecosystem, as has Malaysia, while Vietnam is attracting significant manufacturing activity. Our objective is to bring a global perspective while enriching it with local expertise, culture and language.

What is the scale of Tenthpin's Japan operation today?

If we consider the work we are undertaking for Japan, we currently have just under 30 people supporting the market. That is not a massive operation, particularly when you consider that we have around 650 people globally.

Japan is one of our more recent endeavours. We started there only about two years ago and continue to grow. We already have a significant number of customers because many Japanese companies also operate extensively in the US, Switzerland and other markets.

For example, companies such as Daiichi Sankyo and Takeda operate globally. Decisions may be taken outside Japan, while projects are executed in Japan, Europe or the US. We also support European companies operating in Japan.

One example involved a European pharmaceutical company that acquired a manufacturing site in Japan and needed a rapid SAP implementation to transition out of a transaction-services agreement with the seller. We supported that process.

South Korea is another market we are developing step by step. It has a very large and rapidly expanding CDMO market, and we receive requests from major systems integrators that have a broad presence in local markets but do not necessarily have the same depth of life sciences expertise.

How does Tenthpin serve clients across diverse APAC markets such as Singapore, Malaysia, Vietnam and the Philippines?

There are two broad situations. In some cases, the headquarters are located in Asia. In others, the headquarters are in Europe or the US, while significant decisions are still taken within Asian markets. As advisors, we need to strike the right balance. We bring headquarters intelligence into the country while also providing local knowledge around regulatory, tax, legal and statutory requirements.

Asia is particularly diverse. Even compared with Europe, markets across Asia can be highly distinct and relatively isolated from one another. That makes local understanding extremely important.

Our partnership with SAP is also an important market-entry mechanism. SAP has established account structures and account executives across these markets and often brings us directly into customer discussions. When entering a market such as South Korea, where customers may not yet know Tenthpin, getting that first meeting is critical.

SAP is therefore an important door opener for us. We participate in customer pitches and, in some cases, effectively manage the entire sales cycle, including pre-sales and supporting the SAP representative in selling licences. There are standard partner and reimbursement models for such arrangements, depending on the product and engagement.

How are the India and Japan hubs differentiated, and where do they collaborate?

There is full integration. Everything we do at Tenthpin is globally connected. For example, we have a bi-weekly call where we discuss the business pipeline with colleagues from Japan, India, the US, the UK and other locations. The same applies to recruitment. When we discuss which talent and profiles we need and where to hire them, everybody participates because we want to make those decisions collectively.

The difference is in the market capabilities. India has a much longer footprint in technology transformation, particularly around SAP, but not only SAP. Access to talent is also much stronger in India, particularly in locations such as Bengaluru, Pune, Hyderabad and Chennai.

When we started in India five years ago, the first 25 people we hired were individuals we had worked with previously, in some cases a decade earlier. They already knew us and trusted us. That core team helped us build the broader organisation.

Japan, by contrast, is more focused on transformation and local implementation work. Often, customers want a local Japanese face because language remains a challenge. Indian professionals are generally more flexible in terms of working across international projects. People in our Indian office work on projects in the US, UK and other markets. That makes India a much more global delivery workforce, while Japan is primarily focused on local transformation work.

Does Tenthpin plan to establish direct operations in other APAC markets, including South Korea or China?

Historically, we have followed our clients. If we have a significant assignment in a country, we use that opportunity to build an intensive local practice. If it is a one-off project lasting a year, it may not justify establishing a full practice. A good example is Eli Lilly. We have supported its Asia-Pacific rollout across almost all countries in the region. In some markets, however, we know the project is a one-off and therefore does not necessarily justify building a permanent local organisation.

China is obviously difficult to ignore. It is an extremely important and interesting life sciences market, but establishing a direct presence is challenging because of the evolving governance environment and increasing emphasis on local software, local companies and greater control over data.

We already undertake significant work in China for global companies headquartered in the US and Europe. The question is different when considering purely domestic Chinese companies. That is a highly competitive and cost-sensitive market, so we have to assess where our capabilities can create the greatest value. We do not necessarily need to be everywhere.

Which life sciences segments do you see generating the strongest opportunities across APAC?

I would highlight three areas- The first is traditional pharmaceuticals, from API manufacturing through drug product and finished products. I believe a significant transformation wave is coming because of new technologies and new distribution models. Many large pharmaceutical companies are also entering individualised therapies, which represents a completely different operating model.

The industry has traditionally been built around large batch sizes. It is now moving towards batch size one, which requires very different capabilities.

The second is advanced therapies. We work with early-stage biotechnology and pre-commercial companies that are in Phase II or Phase III clinical development and could potentially become the next generation of major pharmaceutical companies. We are already working with companies where commercial launches are expected within the next two years, helping them prepare technologically for those launches.

There is another interesting development here. Depending on the country and regulatory requirements, companies developing advanced therapies may need to provide evidence regarding the technology systems supporting their operations as part of their product submission. That brings technology considerations much earlier into the development process than we saw a decade ago.

The third is CDMOs. The CDMO market is growing rapidly because these organisations possess technical and manufacturing capabilities that some large pharmaceutical companies no longer maintain internally.

Many new therapies are being launched through CDMOs because they have the required capabilities and capacity. Manufacturing is one of the biggest constraints for several new therapies, creating a significant opportunity for countries such as India to address this capacity gap.

With APAC being so fragmented in terms of regulations and operating models, how do you help clients build a common transformation approach?

There is a growing trend towards stronger localisation, driven largely by global supply chain risks and disruptions. COVID-19 and geopolitical conflicts have exposed vulnerabilities in global supply chains. The challenge is finding the right balance between local resilience and maintaining connection with the global ecosystem.

I strongly believe that markets can learn from one another. Germany can learn from India just as India can learn from Germany. The same applies across almost every country combination. Even if companies pursue greater localisation, they should not lose sight of the fact that healthcare is fundamentally a global ecosystem concerned with human wellbeing.

One example is Roche and SAP's Intelligent Clinical Supply Management initiative. Roche could have developed a solution independently, but instead chose to build something from which the broader industry could benefit.

Companies including Eli Lilly, Merck, Amgen, Novartis, Roche, GSK, AstraZeneca and Boehringer participated in the broader innovation effort. The resulting product is now live at Novartis and Daiichi Sankyo, with implementations underway or planned at Roche, AstraZeneca, GSK and Gilead. This is an example of networked innovation rather than isolated innovation.

What is your current China strategy?

It depends to some extent on how the Chinese government continues to shape the market.

There is a strong push towards localisation, including local software and greater local control. For a non-Chinese company, establishing a direct presence under these conditions is increasingly difficult. At the same time, global pharmaceutical companies continue to reinvest in China, and we support many of them there. That will remain an important part of our business. For purely domestic Chinese companies using local software, however, the competitive environment is very different. We need to decide where our capabilities are most relevant.

Our approach is therefore selective. We want to grow India, the US and other strategic markets rather than trying to establish a presence everywhere. For Tenthpin, the emerging APAC model is therefore not simply about adding more country offices. It is about connecting specialised capabilities across markets—using India's technology talent, Japan's local market expertise and the scale of a global delivery network to support increasingly complex life sciences transformations.

Narayan Kulkarni

narayan.kulkarni@mmactiv.com