THE BIOPHARMACEUTICAL COMPETITIVENESS & INVESTMENT (BCI) SURVEY 2017

LATAM SPECIAL REPORT

About the Survey:

The survey measures the attractiveness of 10 countries in Latin America for investment by biopharmaceutical research-based companies. Countries

surveyed include: Argentina, Brazil, Chile, Colombia, Costa Rica, Dominican Republic, Ecuador, Mexico, Panama and Peru.

COMPETITIVENESS AND INVESTMENT ENABLING FACTORS AVERAGE SCORES IN LATIN AMERICA

Latin America Average Score

59%

Scientific Capabilities & Infrastructure

Market

Access &

Financing

559

58%

Clinical Research Conditions & Framework

Effective Intellectual Property Protections

earch & 62%

56%

The Regulatory System



BCI MAIN TAKEAWAYS FOR BUILDING SUSTAINABLE BIOECONOMIES



Value of Policy Implement comprehensive, consistent long-term policies that enable and support biopharmaceutical investment.



Long-Term Vision
Minimize budget cuts and keep focus on long-term vision of becoming a hub for biopharmaceutical investment.



Prioritizing Innovation
Prioritize innovation by
committing to investment
in R&D infrastructure



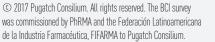
Strategic Budget Management Favor efficient and transparent management of healthcare budgets focused on beyond the pill and access-focused initiatives



Regulatory Upkeep
Ensure regulations are
aligned with scientific
advancements, especially in
the field of biotechnology
and medicines, to ensure
patient safety



Clinical Trial Infrastructure Attract clinical studies by investing in infrastructure and streamlining approval processes









BCI SURVEY - LATIN AMERICA PERFORMANCE IN COMPARISON TO OTHER REGIONS.

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Enabling Factors	Scientific Capabilities & Infrastructure	Clinical Research Conditions & Framework	The Regulatory System	Market Access & Financing	Effective Intellectual Property Protections	Overall scores
Middle East & Africa average	54%	61%	57%	53%	55%	57%
Latin America average	55%	62%	57%	58%	56%	59%
Asia Pacific average	62%	69%	59%	54%	63%	61%

Key Insights of Regional Comparisons

Focusing on a handful of areas of reform does not lead to a thriving biopharmaceutical sector; instead, a holistic and comprehensive approach is required that addresses variables across the entire biopharmaceutical ecosystem. Achieving and maintaining a successful healthcare system is not guaranteed by brute economic force or market size.



LATAM, AP and MEA still have room for improvement and collectively are more or less at the same level – around 60% of the total possible score.

LATAM, AP and MEA tend to face the most challenges in the areas of market access and regulatory systems – and in LATAM and MEA also in effectiveness of IP protections.

LATAM, AP and MEA on average have the greatest strength in the area of clinical trials





