

► **DELIVERABLES**

- An electronic report (at least 120 pages) delivered in Microsoft Word® with six detailed country profiles that include:
 - Healthcare market trends with a focus on drugs
 - Executive summary, interview analysis, and interview extracts
- Comparative cross-country analysis presented in Microsoft PowerPoint® (approximately 50 slides)

► **QUALITY CERTIFICATION**

IHS GLOBAL INSIGHT FRANCE was acquired by IHS in late 2008.

GLOBAL INSIGHT FRANCE commits itself to due care and to the ethical standards (confidentiality, exclusivity) of the industry. As a member of « Syntec études marketing et opinion », GLOBAL INSIGHT FRANCE applies and requires application of:

- The ICC ESOMAR international code
- The ICC ESOMAR international guidelines
- The French legislation n° 78-17 of 6 January 1978



DAFSA products of GLOBAL INSIGHT FRANCE are certified ISO 20252 (certificate N°QUAL/2008/33149, 15 December 2008, delivered by AFNOR CERTIFICATION). DAFSA was previously certified NF « Qualité des études de marché et d'opinion ».

► **ABOUT IHS GLOBAL INSIGHT'S HEALTHCARE PHARMA PRACTICE**

IHS Global Insight's Healthcare & Pharmaceutical practice provides a portfolio of intelligence solutions to optimize the performance of companies and organizations across the pharmaceutical, biotech, and generics sectors. Our key focus is to provide actionable insights to support strategic decision making, particularly in the fields of market access, pricing and reimbursement (P&R), emerging markets, generics strategies, therapeutic development pathways, and general competitive intelligence. We deliver high-value subscription and consultancy services to address daily healthcare information needs, highlight important market trends and obstacles, and maximize product lifecycles. These services include our Same-Day Analysis—providing the latest global analysis on fast-paced developments in the sector on a daily basis—multi-client studies, special reports, country reports, global pricing data, and market access consultancy. Our expertise is based on the unparalleled geographic and therapeutic specialties of our in-house data and specialized analysts.

For more information, please visit www.ihsglobalinsight.com/healthcare.



**MAXIMIZING OPPORTUNITIES
IN THE BRIC-MT BLOC:
MARKET ACCESS STRATEGIES IN THE
WORLD'S FASTEST GROWING MARKETS**



THE POWER OF PERSPECTIVE

ABOUT IHS GLOBAL INSIGHT: IHS Global Insight (www.ihsglobalinsight.com) provides the most comprehensive economic and financial information on countries, regions, and industries available from any source. IHS Global Insight's immediate and insightful analysis of market conditions and key events enables innovative and successful decision making for clients around the world. IHS Global Insight employs approximately 700 employees in 13 countries.

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IHS Global Insight's latest multi-client study provides a comprehensive overview of the drug markets and associated regulations in BRIC-MT countries (Brazil, Russia, India, China, Mexico, and Turkey).

Our primary research and market analysis helps organizations explore the opportunities for pharmaceutical and biotech firms in these markets.

Emerging markets are increasingly attractive to pharmaceutical companies, presenting strong opportunities for expansion and diversification; however, the challenging regulatory landscapes can pose investment risks.

In order to invest successfully, organizations need to develop greater insights into the emerging healthcare systems and regulatory environments within these markets.

▶ **A NEW STUDY FROM IHS GLOBAL INSIGHT**

In our new multi-client study, *Maximizing Opportunities in the BRIC-MT Bloc: Market Access Strategies in the World's Fastest Growing Markets*, we explore the opportunities presented by these pharmaceutical markets and delve into their regulatory environments.

Additionally, we examine the role of public and private healthcare insurers, and pricing and reimbursement policies for drugs developed in BRIC-MT countries.

For each country the study answers key questions such as:

- What are the business opportunities for the pharmaceutical industry? For which therapeutic areas?
- How is the statutory health insurance system organized?
- What are the procedures and timings for drug marketing approvals, as well as pricing and reimbursement?
- What is the best way to negotiate with relevant authorities?
- What are the time-to-market trends?
- What role does the private health sector play?
- What are the price trends for drugs in each country, including innovative drugs?

▶ **METHODOLOGY**

Using primary and secondary research, the report provides in-depth insight into major emerging markets. It offers unique analysis based on detailed interviews with regulatory authorities, investigating their knowledge and perspectives on the market.

We encourage clients to review and provide input into the interview guidelines and the scope of the analysis to ensure we accommodate specific business needs. The report is supported by our healthcare and pharmaceutical team of experts and resources, providing a solid basis for analysis and forecasts.

Interview guidelines and other documents are drafted in English and then translated into the local language and reviewed by a professional translator. *Curriculum vitae* and the translated interview guides are made available to clients upon request.

The report includes:

- Details of the legal and regulatory framework for drugs in each country
- An overview of the current pharmaceutical market

▶ **PRIMARY RESEARCH: A QUALITATIVE APPROACH USING IN-DEPTH INTERVIEWS**

- Telephone interviews of approximately 45 minutes
- Recorded interviews with the consent of the interviewee or written summary of the interview sent for final approval to the interviewee
- E-mail exchanges following the interview for further information

The telephone interviews are conducted by a qualified consultant and then reviewed by the IHS Global Insight project manager. A two-step process is implemented in order to avoid inconsistencies and maintain accurate results.

This report includes at least 15 interviews with regulatory authorities, investigating:

- The condition of the general healthcare system, with a focus on pricing and reimbursement policies
- The perception and condition of cost-containment policies for drug expenses
- The role of private health insurers and their impact on drug coverage
- Key therapeutic areas with unmet needs—hence, opportunities for drug development
- Expected trends and forecasts of pricing and reimbursement systems and healthcare market data

▶ **SECONDARY RESEARCH**

- Extensive research based on secondary sources and data, analyzing market trends and opportunities in the BRIC-MT countries
- Sources include research materials from national authority institutions, such as the Brazilian National Drug Approval Agency, the Chinese Ministry of Health, the Indian National Pharmaceutical Pricing Authority, and the Mexican Social Security Institute
- IHS Global Insight's Pharmaceutical and Healthcare Group and national pharmaceutical newspapers, such as *China Pharmaceutical News*, or specialised Web sites, such as www.pharmabiz.com in India.
- Extensive analysis of legal and regulatory frameworks
- Highlights on the main stakeholders and healthcare market data

TABLE OF CONTENTS

I Overview of the current healthcare system

- Healthcare organisation
 - Authorities and their roles
 - Primary and hospital care
 - Role of private healthcare insurance
 - Role of the wholesalers
- Healthcare data and expenses
- Focus on drugs
 - Main manufacturers
 - Drug expenses
 - Drug cost-containment policies

II Healthcare regulatory framework

- Marketing approval for drugs
 - Per type of drug (branded, generic, OTC)
- Pricing and reimbursement for drugs
 - Per type of drug (branded, generic, OTC)
 - Margin and pricing systems
 - Reimbursement system

III Trends and opportunities