Strengthening the Life Sciences Sector in Mexico

International Best Practices, Lessons Learned and Evidence from the Field

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Building a competitive biomedical sector: A global race

- Building strong biotech/biomedical sector is strategic priority – LatAm, BRICs, CIVETs, established OECD economies: **the competition is fierce**

- Manufacturing = decreasing portion of biopharma FDI – countries need to **focus on factors/incentives that attract/build R&D capacity**

What is the best way to encourage innovation and attract investments?
Seven enabling factors for biotech innovation

- Intellectual property
- Infrastructure for R&D
- Human capital
- Regulatory environment
- Technology transfer frameworks
- Market & commercial incentives
- Rule of law
IP protection and growth of the dynamic economy

IP protection is critical for greater investment in cutting-edge clinical research

Development of biological therapies is closely linked to IP protection

International IP Index 2017: Overall scores
Biopharma competitiveness: What do the experts say?

**Key challenge 1: Market access**
- Patient access hampered by P&R delays
- Gap between product registration and actual MA a key concern

**Key challenge 2: Effective IP protection**
- IP environment viewed as relatively strong
- Concerns persist over lack of RDP (biologics) and patent linkage mechanism
Improving the policy environment: what Mexico stands to gain?

Conservative scenario
- Clinical trials: +47 / year
- Economic gains: $182.8 - $230 ml direct monetary gains
- Total economic gains: $457 - $574.9 ml

Optimistic scenario
- Clinical trials: +94 / year
- Economic gains: $218.2 - $312 ml direct monetary gains
- Total economic gains: $545 - $781 ml

Pessimistic scenario
- Clinical trials: -59 / year
- Economic gains: -$44.2 - -$103 ml direct monetary gains
- Total economic gains: -$110 - -$258 ml

The economic and Societal value of Regulatory Data Protection to Mexico's Life Sciences Sector and Mexican Patients

- Hospitals: up to $230 ml
- CROs: up to $258 ml
- Payers: up to $86.2 ml
- Patients: up to $86.2 ml
- Hospitals: up to $312 ml
- CROs: up to $351 ml
- Payers: up to $117 ml
- Patients: up to $117 ml

Clinical trials: $182.8 - $230 ml direct monetary gains
- Total economic gains: $457 - $574.9 ml

Clinical trials: $218.2 - $312 ml direct monetary gains
- Total economic gains: $545 - $781 ml

Clinical trials: -$44.2 - -$103 ml direct monetary gains
- Total economic gains: -$110 - -$258 ml
Thank you!