

A New Partnership for the Innovative Medicines Sector in Algeria

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Overview

- “Why Algeria”?
- Innovative Industry Snap Shot
- Current Industry Perceptions
 - Good News
 - Challenges
 - Aspirations
- Opportunities for a New Partnership

Why Algeria?

- Algeria matters!
 - 36 million people
 - Unmet medical needs
 - Government invests in healthcare
 - Infrastructure to support investment
 - Fast-developing emerging market country
 - Government signals interest in developing sector

Why Algeria?

Industry sees opportunities in Algeria to:

- Address unmet medical needs through access to innovative medicines
- Work with Algerian policy-makers to develop a globally-competitive, innovative biomedical sector

Global Industry Snap Shot

- Biotechnology & research-based pharmaceutical companies developing innovative medicines & vaccines that save, extend, improve the quality of life.
- Thousands of projects, hundreds of cutting-edge products in the “pipeline”
 - e.g., cancer, diabetes, HIV/AIDS, geriatric diseases
- Total annual investment > USD 100 billion

Global Industry Snap Shot

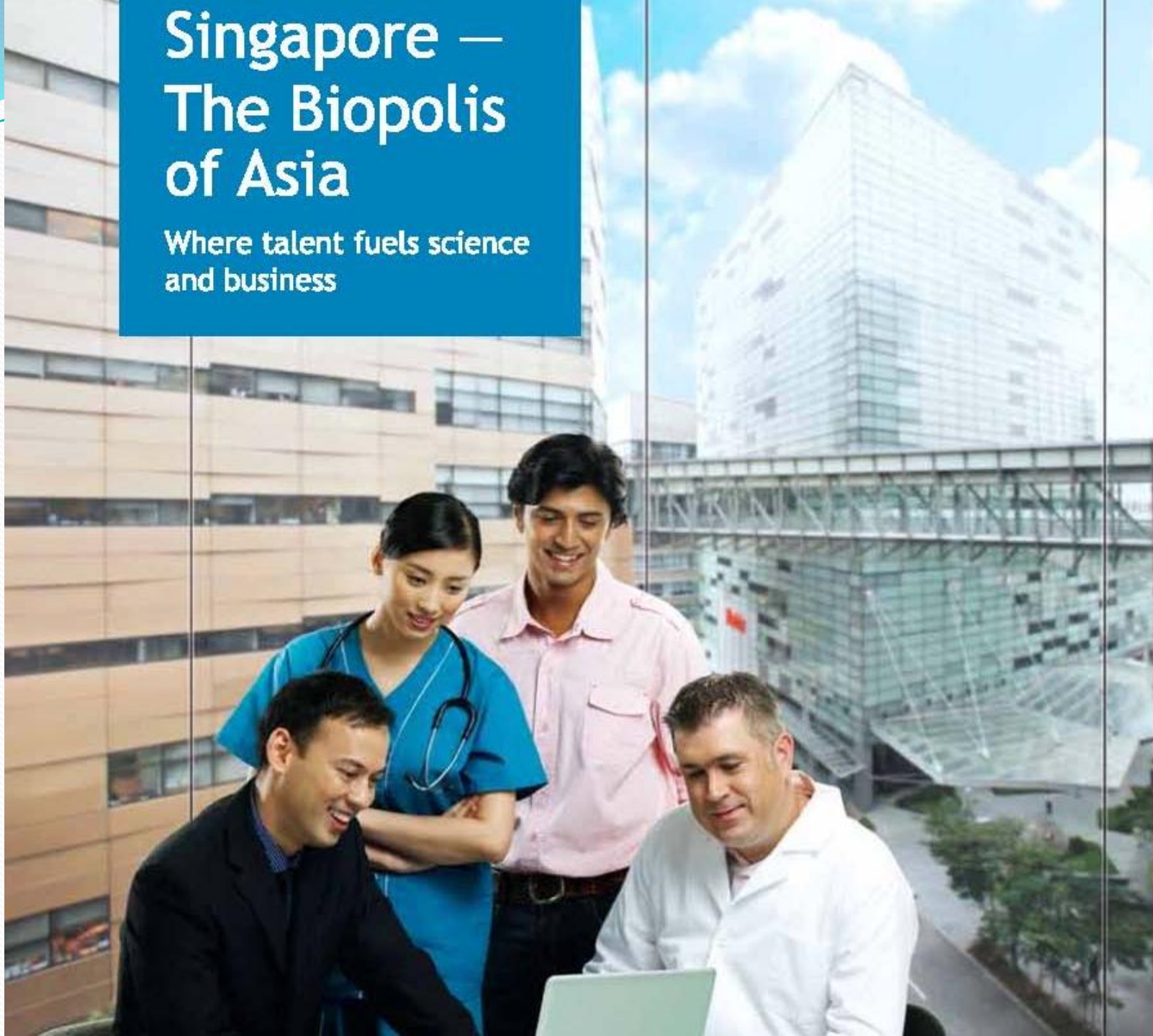
- Tens of thousands of scientists, technicians
- Thousands of R&D partnerships
 - 80,000 clinical trials per year (40K in USA)
- USD 100 Billion
 - USD 10 Billion for Capital Improvements
 - Manufacturing, facilities, equipment
 - USD 90 Billion for Research & Development (R&D)
 - Basic, pre-clinical, clinical, post licensure

Where does this investment go?

- Traditional bio-medical innovation centers
 - USA
 - Europe & Japan
- New competitors
 - Emerging markets
 - China, India...Russia?
 - Smaller “Tigers”
 - Singapore

Singapore — The Biopolis of Asia

Where talent fuels science
and business



Dynamic Bio-cluster in Singapore



Why Singapore?

Disadvantages:

- Small population
- No natural resources
- Limited geography
 - Imports sand from Malaysia!

Advantages:

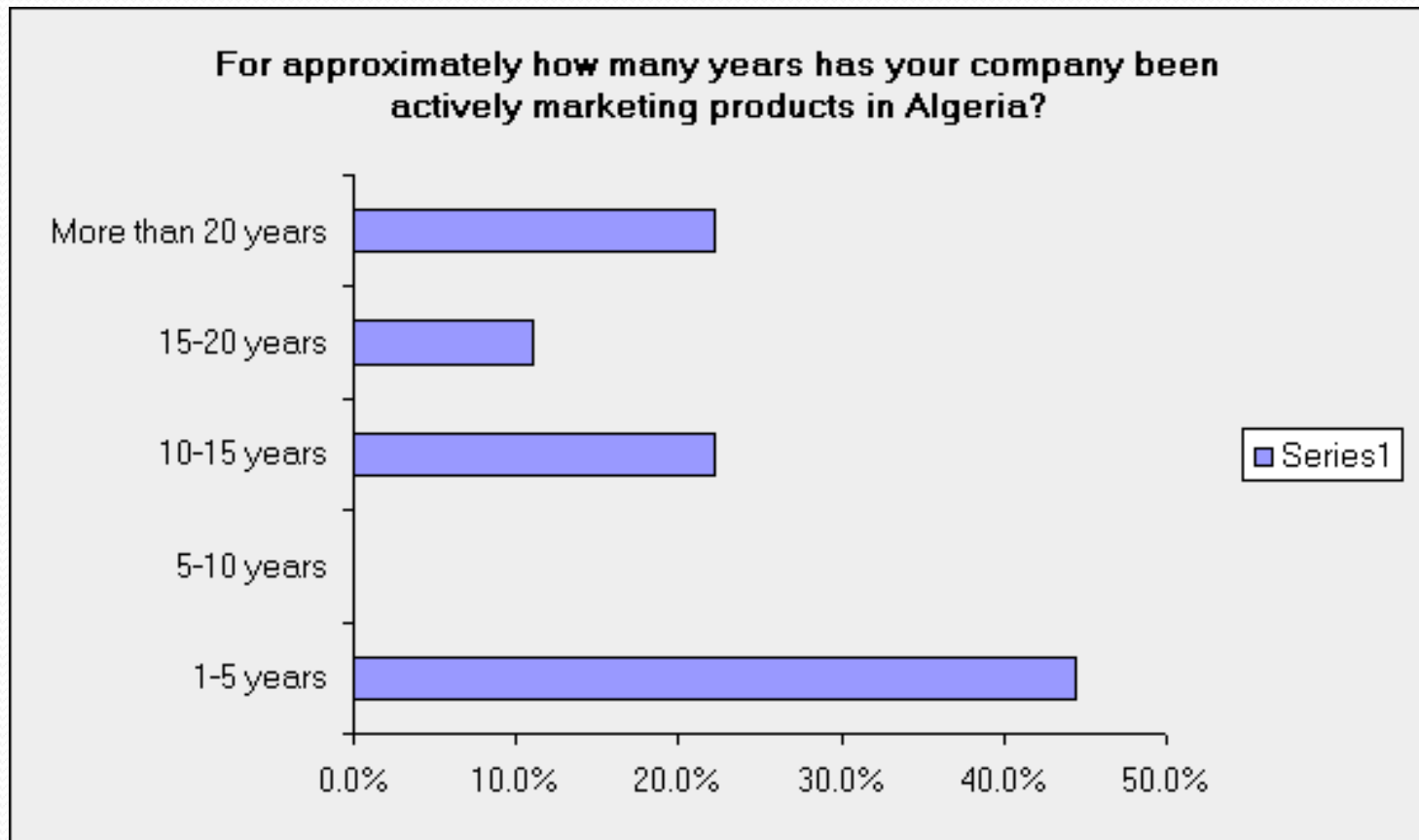
- Consistent dialogue
- Superior policies
 - Regulatory
 - IPR
 - Work visas
 - Taxation, etc.
- Benchmarks progress vs. competitors

Why not Algeria?

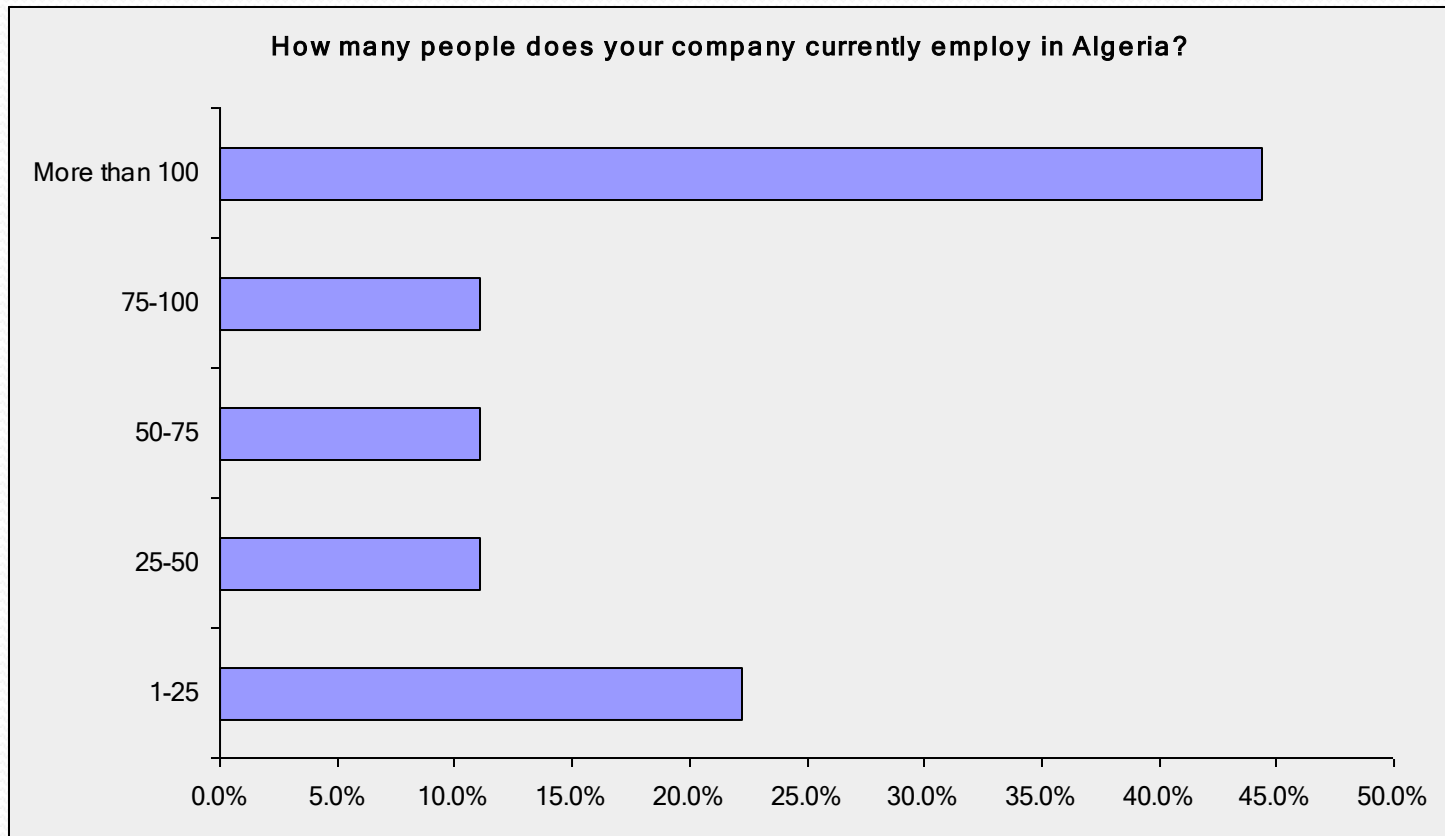
First, the Good News

Results from a recent industry survey of leading innovative medicines companies in Algeria

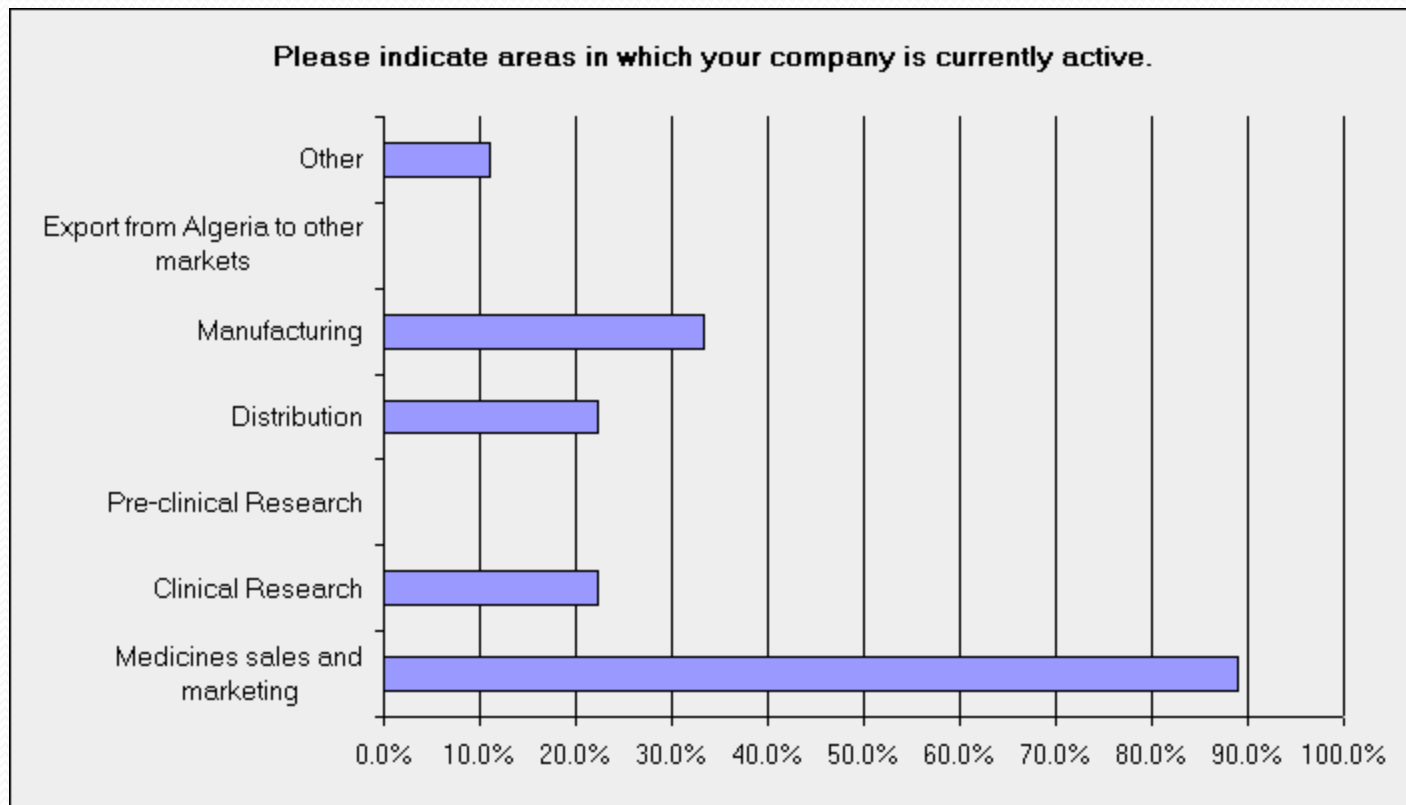
The innovative medicines industry is already present in Algeria



We employ lots of highly educated, skilled people

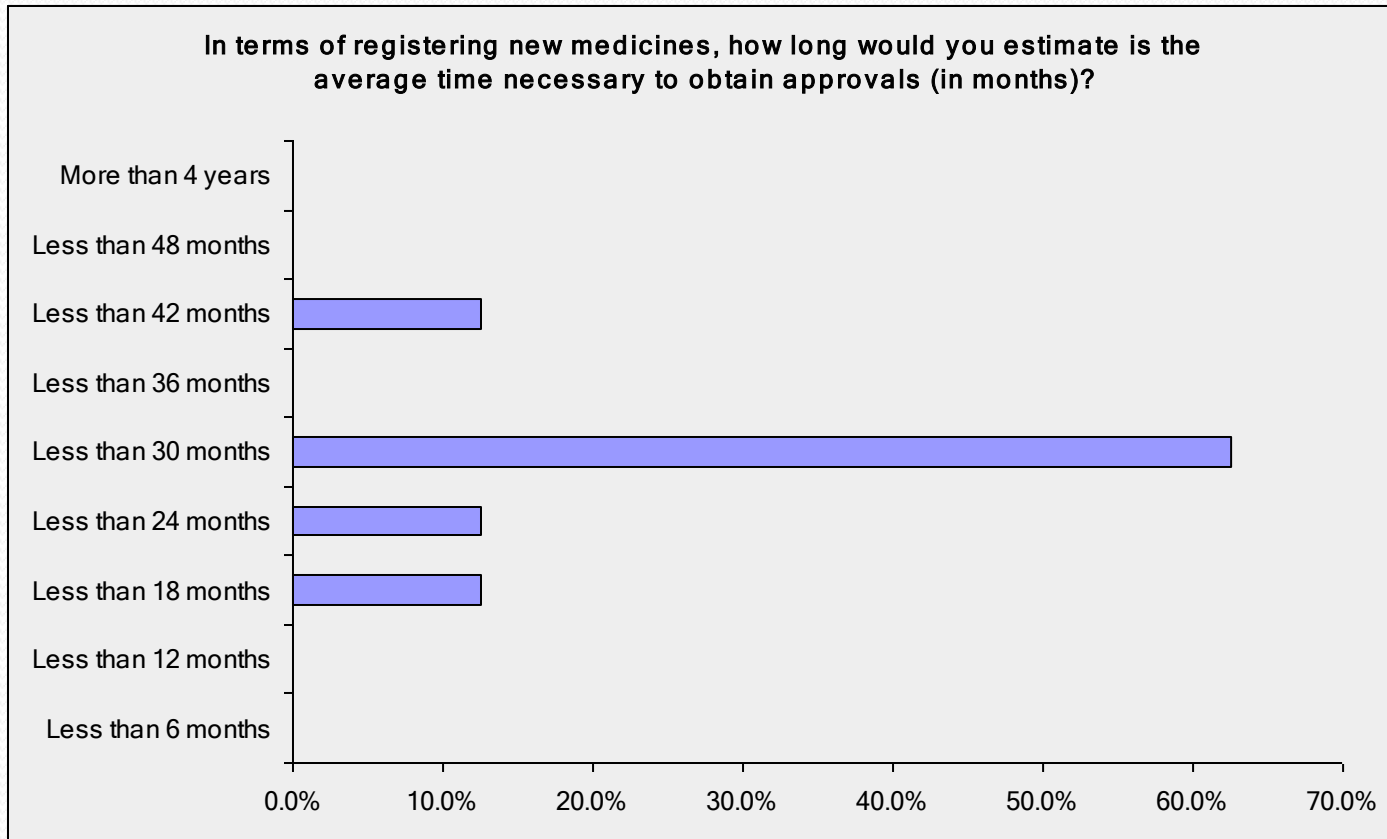


We are active in diverse areas, from research to manufacturing to marketing

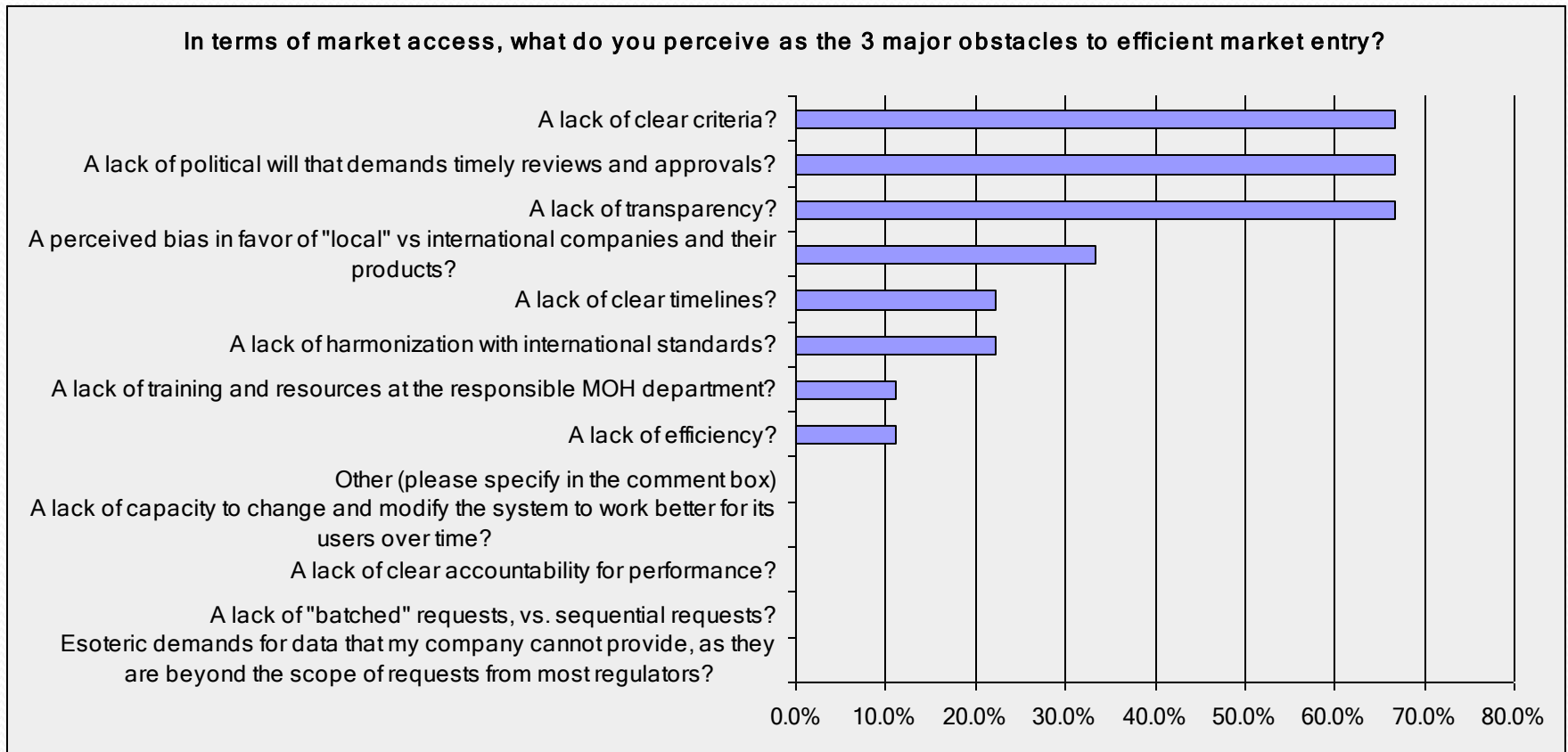


But, there are challenges, too

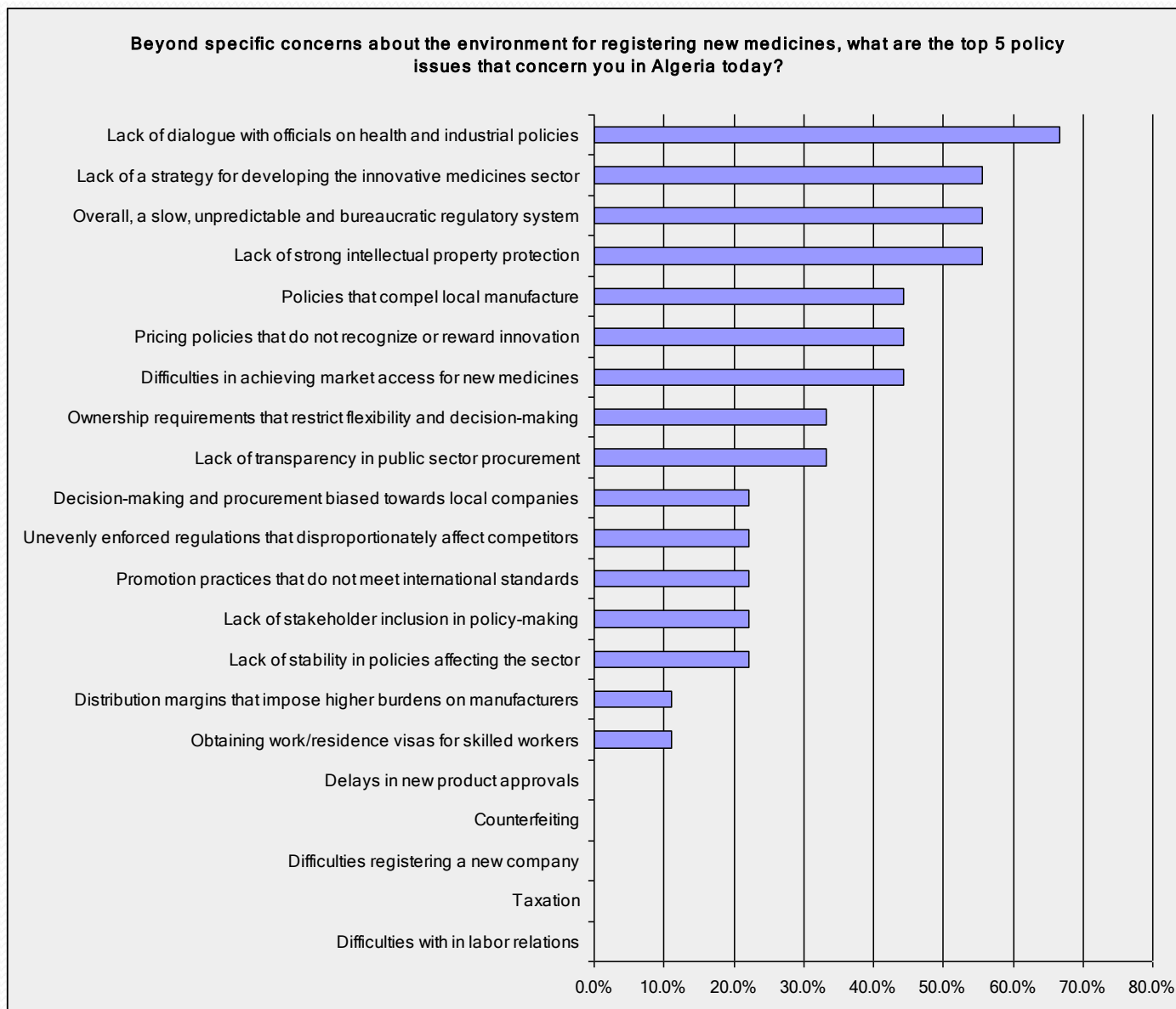
Long delays in new medicines registration



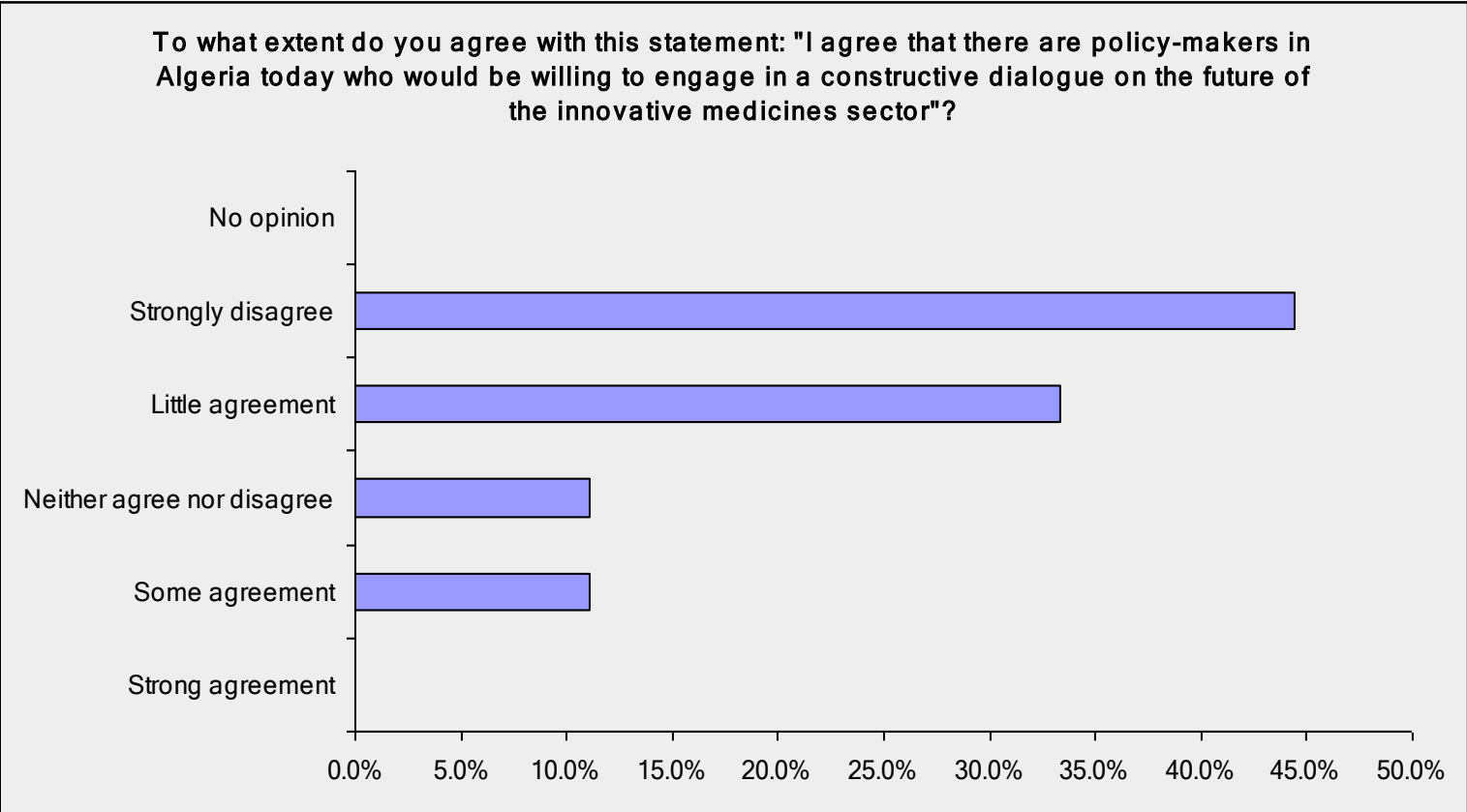
Regulatory barriers to introducing new medicines, patient access



A lack of dialogue, strategy & predictability for the sector



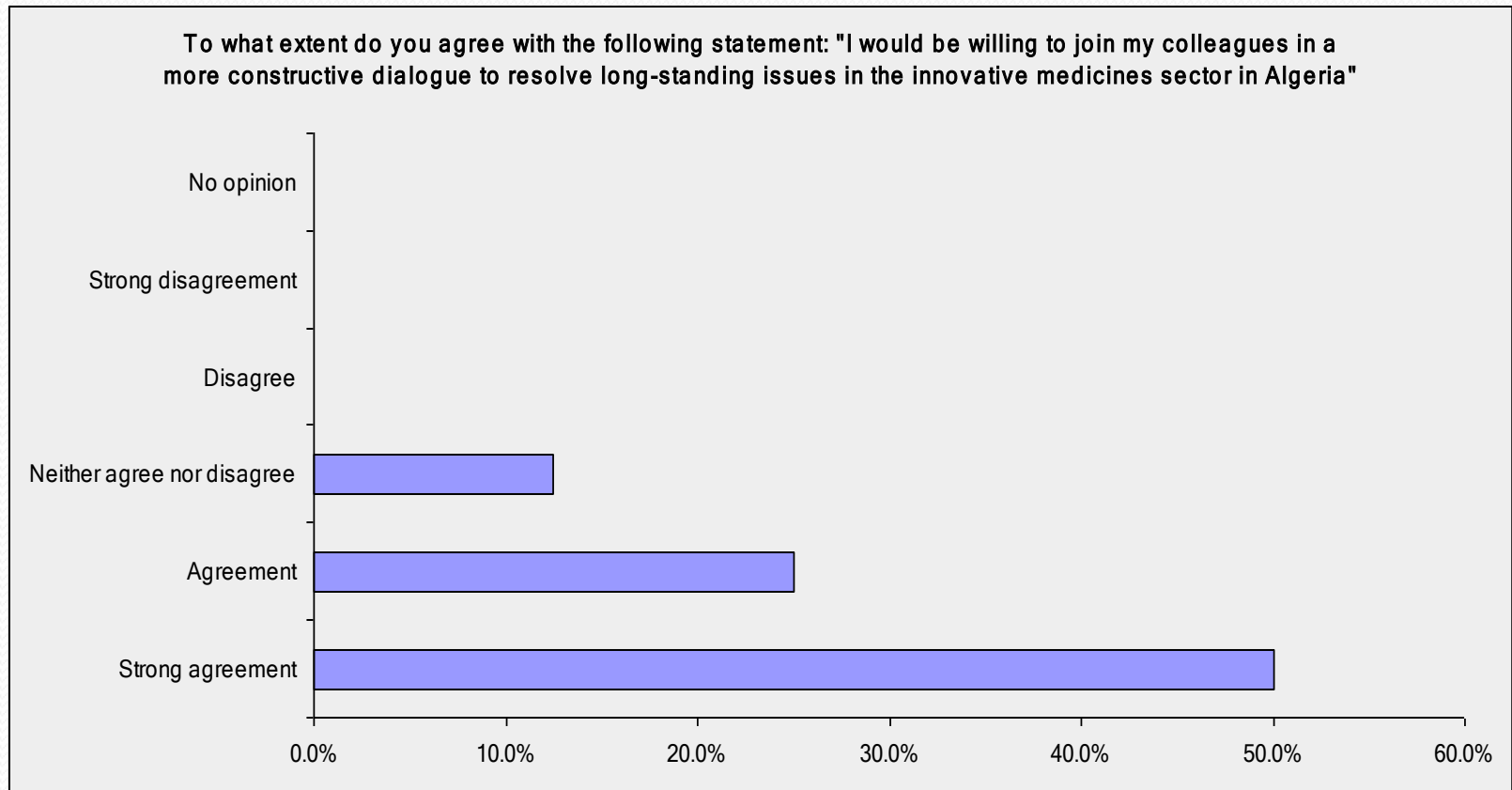
Today: Industry executives are mostly pessimistic about Government readiness for a dialogue on the future of the sector in Algeria



**But, companies are
cautiously optimistic
about the future!**

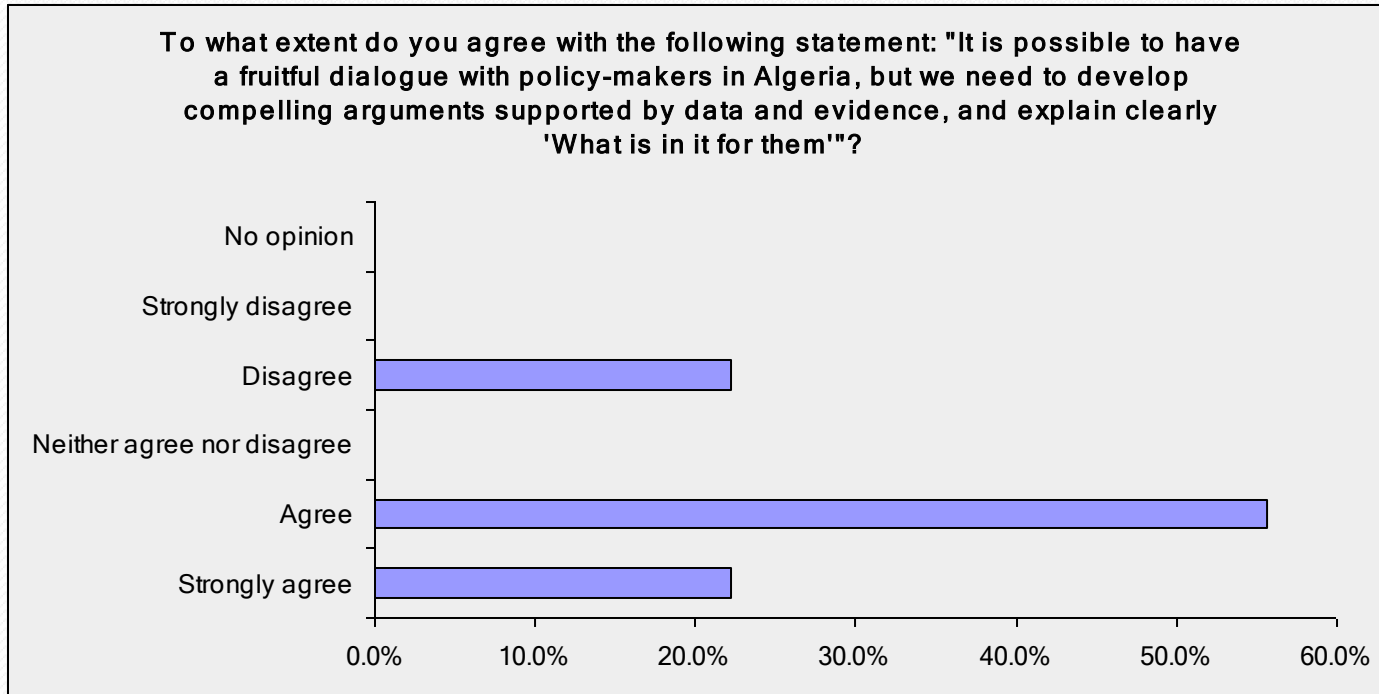
Tomorrow:

Industry executives are willing to invest in a new partnership based on constructive dialogue to resolve issues



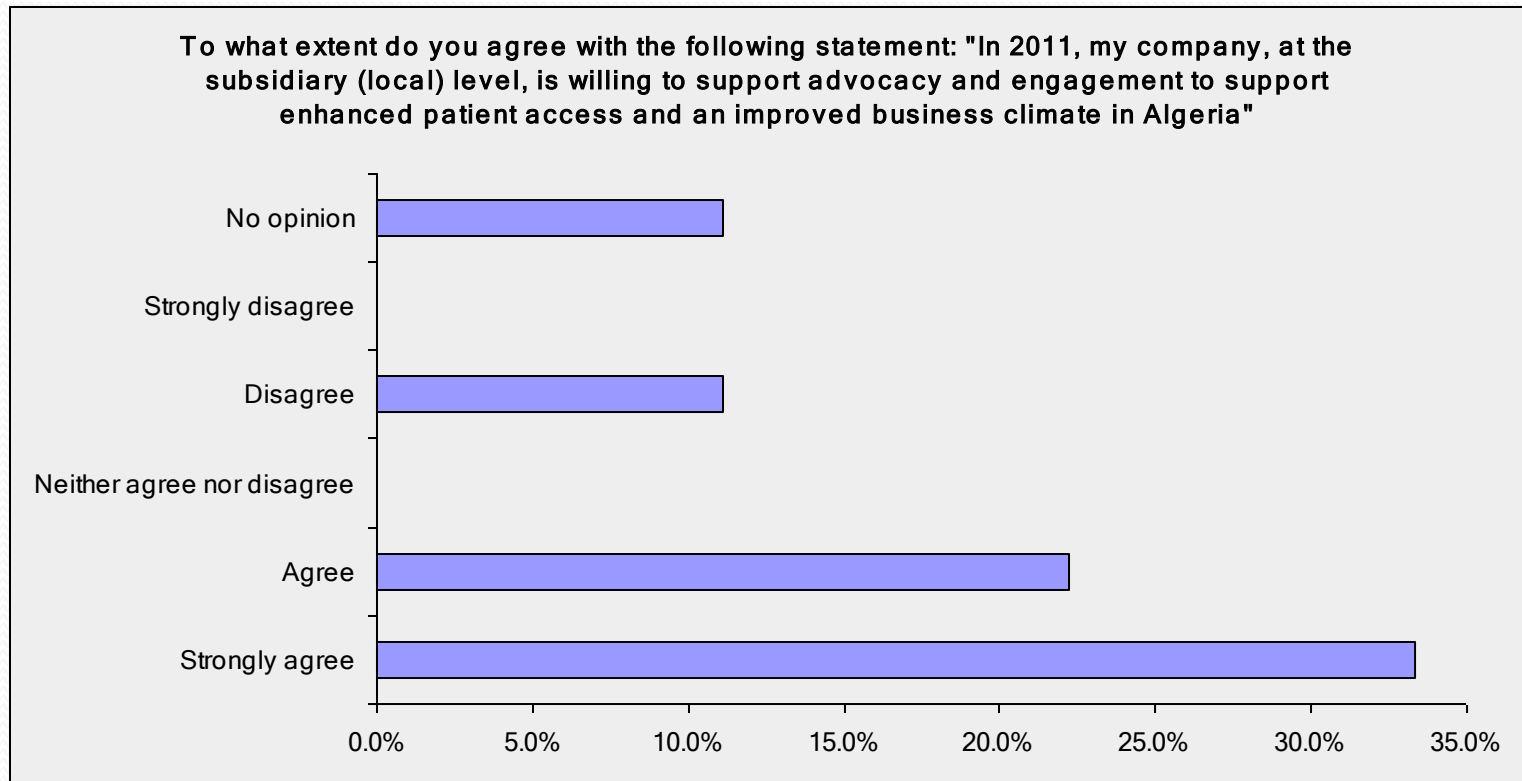
Optimism:

Industry executives are willing to invest in this partnership, and are committed to developing evidence & data to support policy-making



Optimism:

They will support a partnership that enhances patient access to innovative treatments and strengthens the investment climate





Outlook & Summary

What would a highly competitive Algeria look like?

Example:

Registration

- ❑ Fully harmonized with ICH standards
- ❑ New medicines approved/accessible to patients within 60-90 days
- ❑ Center of Regulatory Excellence for North Africa & Mediterranean region

What would a highly competitive Algeria look like?

Example:

Education

- Produces high quality university graduates
 - Sciences, engineering, medicine, business management
- Curricula tailored to meet needs of biomedical sector
- Regular industry-education ministry dialogue
- Work visas for highly skilled employees
 - to ensure technology transfer

Opportunities for Partnerships

- **Leverage new “Footprint, Vision, Policy Road Map” consultants’ report (September 2011)**
- **Initiate a new dialogue on the future of the innovative biomedical sector in Algeria**
 - Advantages
 - Challenges/Solutions
- **Establish long term policies & strategy**
 - To increase predictability, stability

Summary

- Algeria matters!
- Algeria could be a globally competitive player in the innovative biomedical sector
 - The new “Singapore” in the Mediterranean region?
- Industry wants to work with Government to create policies that support patient access to innovative treatments & strengthen the investment climate
- **Political Will + Dialogue = Good Policies**