



The Yaroslavl Oblast pharmaceutical industry and medical innovation cluster





Yaroslavl Oblast
Government

Cluster premises for success

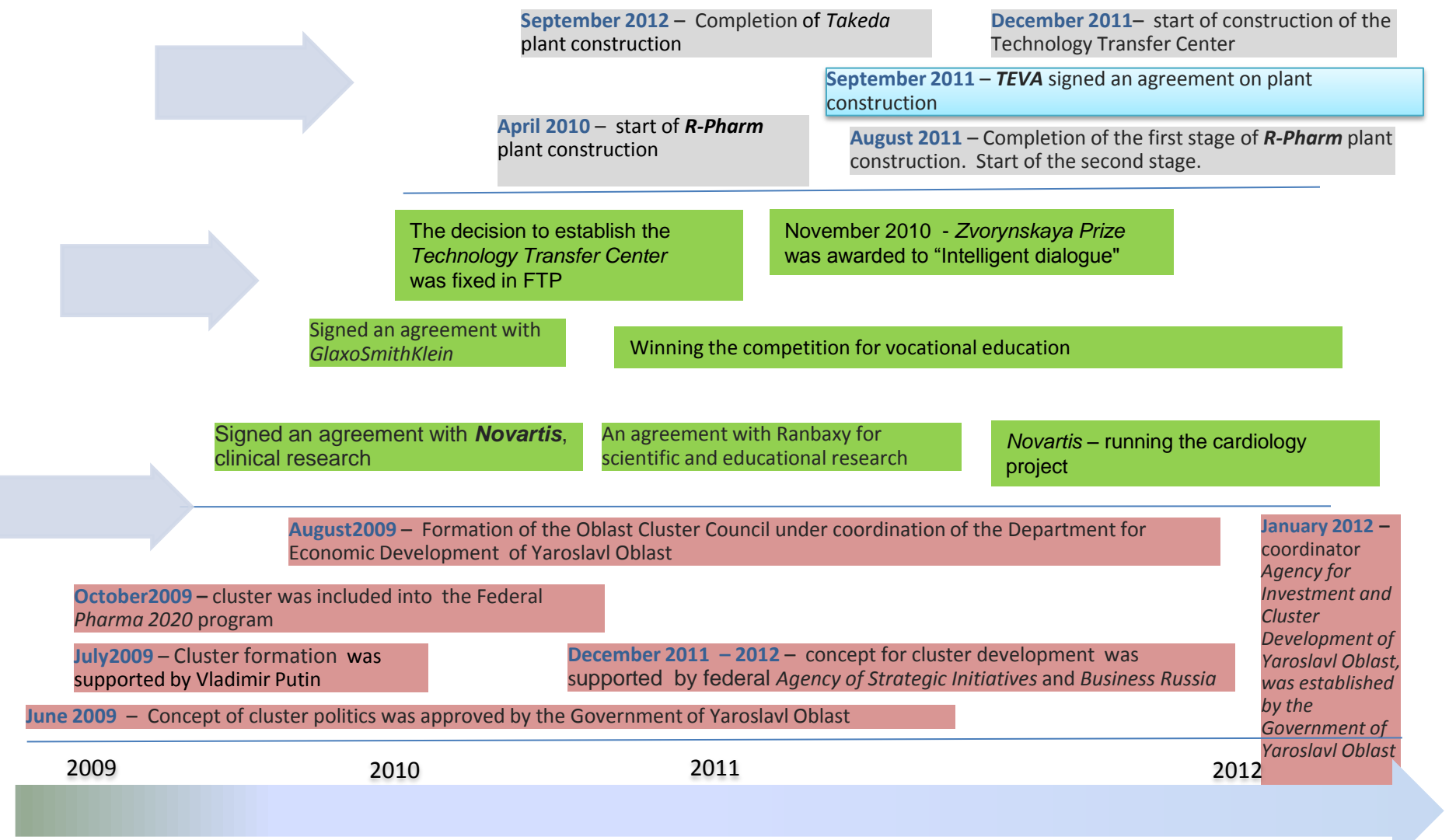
- 100 years experience in chemistry industry, with four generations of professionals
- 20 years of international R&D experience
- Partnership with medical schools in Russia and abroad
- Available and highly skilled workforce
- Location in the center of the largest domestic market
- Localization of leading pharmaceutical companies' plants
- Development of pharmaceutical production – a top priority in investment strategy of the Oblast
- Facilities of industrial sites
- Communal infrastructure resources
- Reasonable energy prices





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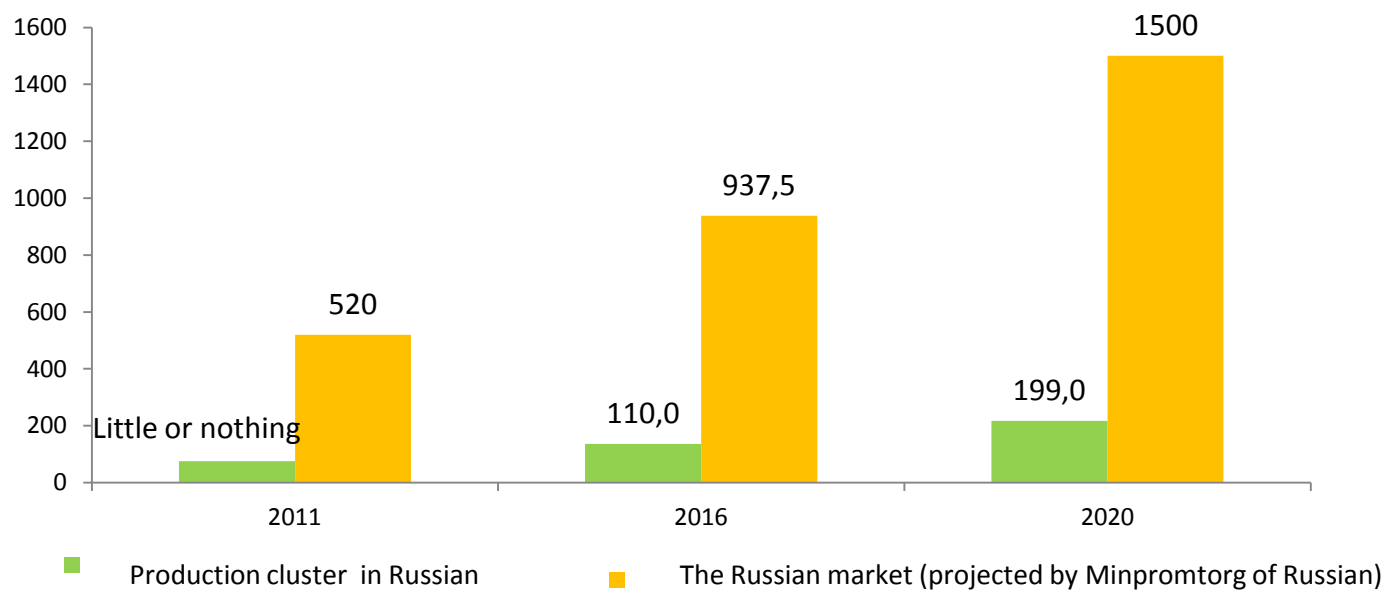
Key stages of formation and development of the cluster





Place of the Yaroslavl Oblast pharmaceutical cluster on the domestic market

**Growth of sales and production of the cluster(%)
in bln.RUR**



Share of the cluster on the domestic pharmaceutical market – over 13%





Pharmaceutical cluster sales localization



Industrial projects of the cluster

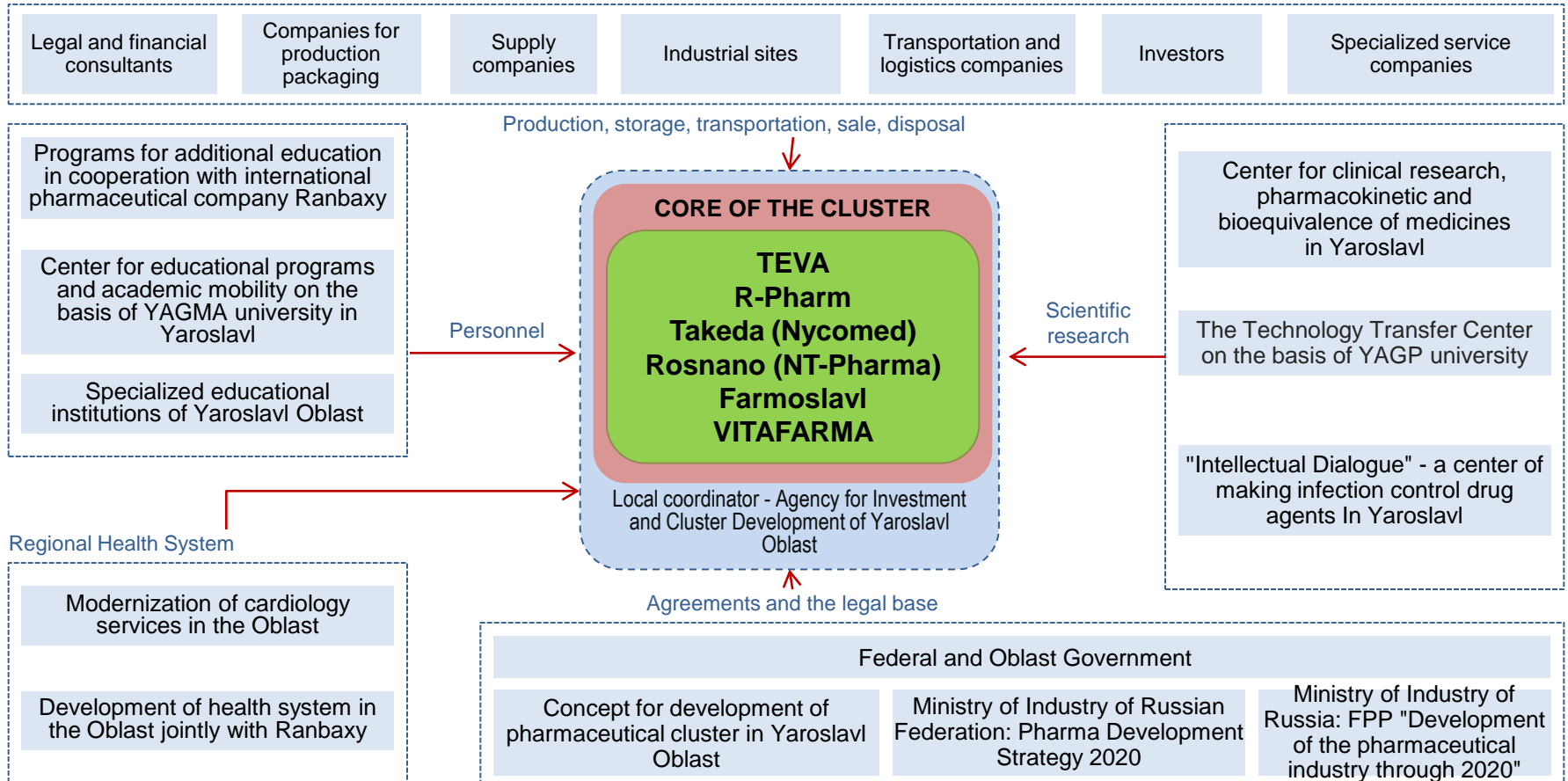
Total amount of investment – 25,7 billion rubles at the first stage

Projects	Amount of investment	The end of construction
 Teva 1) Plant for producing of various over-the-counter health products, Yaroslavl 2) R&D center 	10,5 billion rubles	1) 2014 year 2) 2018 year
 Nycomed Plant for producing of various over-the-counter medicine , Yaroslavl 	2,4 billion rubles	2012 year
 R-Pharm 1) Plant to produce various over-the-counter medicine in the way of pills/tablets/capsules , Yaroslavl 2) <i>Pharmoslavl</i> – chemical plant for production of active pharmaceutical ingredients of chemical origin 3) Plant for manufacturing of biotechnological substances 4) Logistical complex 	10,6 billion rubles	1) completed 2) 2013 year 3) 2013 year 4) 2013 year
 VitaFarma Plant for microbicides manufacturing	0,64 billion rubles	2013 year
 ROSNANO (NT-Pharma) Plant for vaccines manufacturing, Rostov, Yaroslavl Oblast	1,6 billion rubles	2014 year



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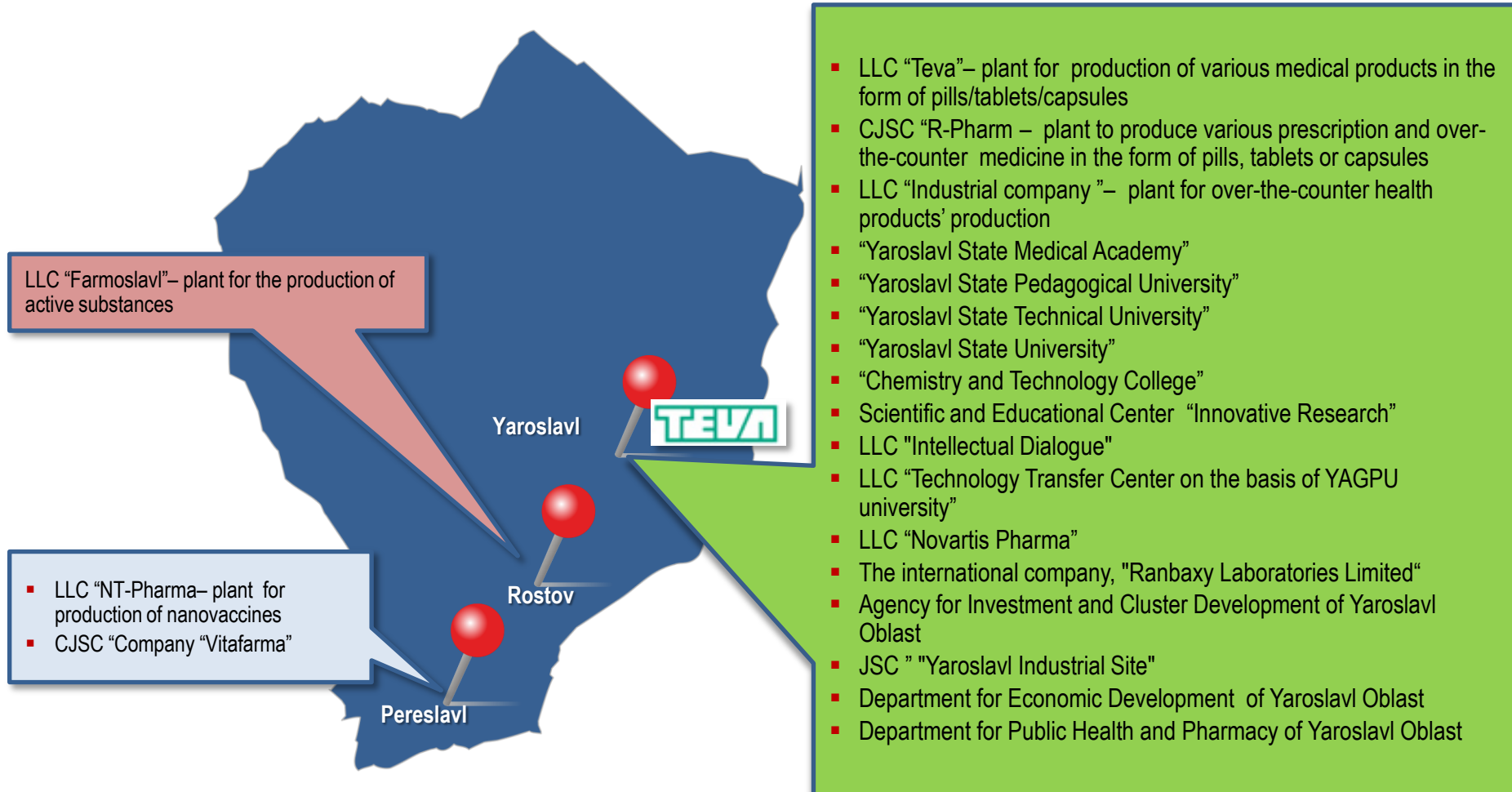
Structure of the pharmaceutical cluster of Yaroslavl Oblast





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Location of the cluster companies in the Oblast





Some general issues foreign companies may face when starting business in Russia

(with proposed solutions)

Issues? → We develop → Solutions!

Shortage or high cost of vacant sites for starting new business

?

Shortage of skilled personnel

?

Administrative barriers

?

Obsolete equipment

?



Program for investment sites development



Projects for personnel training in cooperation with cluster companies



Formation of Steering Council and Agency for Investment and Cluster Development



The implementation of projects under the Federal Program *Development of Medical and Pharmaceutical Industry of the Russian Federation for 2011-2020*





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Organizational framework

Governor of Yaroslavl Oblast
Steering Council



Coordinator of the cluster
(Agency for Investment and Cluster Development)



Management Company
(NPO Pharmaceutical Cluster of Yaroslavl Oblast)



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Major projects



Infrastructural projects in transport, energy, engineering, housing infrastructure

- Construction of water supply and treatment station in industrial sites Novoselki, Krasnoe, Construction of a thermal power plant Huadyan- Teninskaya CCGT -TPP”, power 440-490 MW, Construction of CCGT Rostov (26 MVA), CCGT Pereslavl (52MVA), CCGT Novoselki (52 MVA), CCGT for Farmaslavl company
- Reconstruction of *Tunoshna* airport (Yaroslavl)



Pharmaceutical industry

- Teva, R-Pharm, Takeda, Farmoslavl, NTpharma



Educational infrastructure

- *Institute for Innovation Medicine and Pharmacy* (jointly with YAGMA (Medical Academy)
- Center of post-graduate training for the pharmaceutical industry and innovative medicine (jointly with YAGTU (Yaroslavl State Technical University)
- Professional training for specialists in pharmaceutical sector : local universities and institutes



Innovation Infrastructure

Transfer Center for Regional Technology, development of medical products, clinical research jointly with YAGPU (Pharma Development Strategy 2020)

Center for Diagnosis of Micro-and Nanostructures jointly with *YarGU* and *FTIAN* (Yaroslavl branch)



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Scientific research and educational projects



YAGMA



YarGU



YAGPU



YAGTU

- Center for educational programs and academic mobility in association with Olympus Corporation and Medical University, Kazanava (Japan);
- Center for Clinical Pharmacology

- Center for additional professional education

- Professional training courses for the Oblast pharmaceutical cluster

Yaroslavl Chemistry and Technology College:

- laboratory for chemical analysis
- equipment for instrumentation and automation control
- compressors and pumps technological driver
- electrician-setter



Prospective sectors (greatest demand for skilled personnel):

- pharmaceutical engineering
- water and air treatment;
- logistics (pharmaceutical and medical);
- analytical chemistry (quality control, drugs, technology medical products);
- industrial ecology;
- medical insurance.



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Cooperation with leading international companies



Research and education project for pharmaceutical
safety



Project to optimize cardiology service in Yaroslavl
Oblast



Pulmonology project

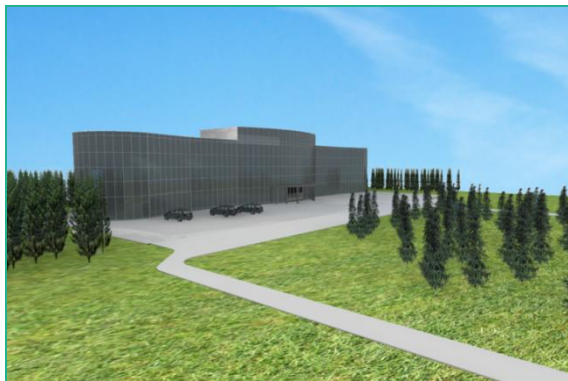


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Improving scientific, research and educational institutions

The project under the Federal Program *Development of Medical and Pharmaceutical Industry of the Russian Federation for 2011-2020*

- Foundation of research infrastructure for pharmaceutical industry in the Oblast, technology development of new highly effective, national innovative and import substituting drugs
- The development of training for pharmaceutical companies personnel with a particular focus on pharmaceutical high-tech
- Laboratory type business incubator with total area of 8600 sq. m.





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Yaroslavl Oblast Offers



- ✓ a place to enjoy a happy life
- ✓ qualified and skilled personnel
- ✓ developed infrastructure
- ✓ special institution to take investors through administrative barriers (*Agency for Investment and Cluster Development*)





Conclusion

1

Pharmaceutical cluster in Yaroslavl Oblast is the first pharmaceutical cluster formed in Russia (2009)

2

The cluster is formed and financed by private business

3

We suggest cooperation for better results

4

Major pharmaceutical companies choose Yaroslavl Oblast to locate their production facilities



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Thank you!

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