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02 Need of the Hour – Shift to Value-based Leadership

- Ms. Ruth D'Souza

Desperate times call for desperate measures; such is the case of the pharma industry today. The stakeholders' trust everywhere has hit an all-time low. It is important to reinvent how the different stakeholders are managed, be it speciality drug makers or generic manufacturers to capitalize on the possibilities that lie ahead.

On the
cover



08 Innovative Way to Reach the Indian Rural Markets

- Interlink Knowledge Cell

Business models for rural marketing will differ to a great extent as the rural scenario is also different from the urban one. Companies that want to exploit this opportunity need to bring in better, innovative solutions. Several aspects need to be considered when formulating the right strategy to enter the rural markets. This article offers a glimpse into what goes into planning a successful rural marketing strategy and how Novartis' Arogya Parivar has seen great success in the rural market.

Special
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14 Which is More Important for Pharma – Vitamin G or Vitamin T?

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21 Opportunities in the Pet Care Market

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The Pet Care market in India as well as the world over has received a great impetus. An increasing number of people opt to have pets in their homes and this has spurred the need to have special pet care products, services and more. This article showcases the growing pet care industry and its potential, as it can be a great avenue for companies to expand into.

Thinking
Fresh

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FROM THE PUBLISHER'S DESK

'Gearing up'

The business of pharmaceuticals is gearing up today, to overcome its deep issues and look forward to a better tomorrow with an optimistic view. Big data gives us a very promising picture of India and also other emerging markets. It shows that demographic dividend, potential of markets and purchasing power holds avenues for better growth, yet reforms are needed in transformation of mindset and skills-set of game changers and patient education.

Gearing up has started from restructuring the market and thereby taking a few decisions at the management level for their direction. Leadership has to go back to **value-based governance**. The Pharma business is integrated with people and face-to-face interactions, **reformation** in the mindset and skills-set needs to be adequately directed.

Ethics is part and parcel of the **Pharma Business process** and it needs gearing up.

1. Should a company be after **growth** or after **transformation** which will yield growth?
2. Should a company take up a **rural** route or urban market?
3. Should a company take measures for the patients awareness against **counterfeit medicines**?
4. Is it time to diversify in **Animal Health** or is it time to **focus undivided attention on pharma**?

Looks to me that these issues are deep enough and every management should have their eyes open to them.

A few thoughts on these subjects have been addressed in this issue of **Interlink Insight**. If you get a few sparks, please share your thoughts with me.

On your feedback we thrive.

Hope you have an enriching reading experience!

Yours sincerely,

Dr. R. B. Smarta
Managing Director

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Need of the Hour – Shift to Value-based Leadership

- Ms. Ruth D'Souza



Desperate times call for desperate measures; such is the case of the pharma industry today. The stakeholders' trust everywhere has hit an all-time low. It is important to reinvent how the different stakeholders are managed, be it speciality drug makers or generic manufacturers to capitalize on the possibilities that lie ahead.

Challenging times for the pharmaceutical industry

The pharmaceutical industry faces challenging times. Almost everywhere, stakeholder trust is at an all-time low. Global surveys repeatedly emphasize the unflattering reputation of the pharma industry. The 2012 Gallup poll showed that the pharmaceutical industry got the second place among the industries viewed most negatively by the public.

The 2012 Patient View survey of 600 international, national and regional patient groups, on the corporate reputation of pharma in general and 29 leading pharma companies in particular showed that the overall industry reputation has dropped. In terms of reputation, the pharma industry was 7th of the 8 healthcare sectors evaluated. Only 34% of respondents gave pharma a “good” or “excellent” rating for reputation. Pharma trailed retail pharmacists (62%), medical device companies (50%), private healthcare services (46%), biotech companies (44%) and generic drug makers (37%).

From a patient's perspective this negative view of pharma is being driven by:

1. A lack of fair pricing policies leading to unseemly profits (50%);
2. A lack of transparency in all corporate activities (48%);
3. Management of adverse event news (37%);
4. Acting with integrity (32%)

Till the final quarter of the last century, the pharmaceutical industry's social, political, technological and economic credentials were unparalleled. Its range of noble and altruistic ideals attracted the best and brightest graduates who delivered an outstanding range of new medicines. Its single-minded pursuit of integrity was widely respected and its reputation, image and influence were without equal.

The erosion of public respect for and trust in the pharmaceutical industry can be attributed to its failure to conduct its

business activities in an ethical manner. Although some would consider the concept of “business ethics” an oxymoron, John Maxwell contends in the book “There's No Such Thing as Business Ethics” that business conduct ought to be governed by the same ethical principles that apply to other endeavours. He emphasizes that the golden rule, or the notion of treating others as one would oneself want to be treated, is a fundamental principle of all human interaction, and that “business ethics” is no exception.

A tale of two companies

India enjoys a reputation in the global generics market, as a reliable provider of good quality and affordable treatment options for patients the world over. A reputed national company (NC) was one of the leading companies that helped build it. In May 2013, after 6 years of investigations, the NC finally pleaded guilty to felony charges related to drug safety and agreed to pay \$500 million in civil and criminal fines under a settlement with the US Department of Justice. The company has admitted it fudged data so that it could launch its products in the United States. What makes the crime so grave is the fact that medicine is consumed by all, whether young or old, rich or poor and is meant to save lives and improve the well-being of patients.

Interviews with the whistle-blower point to systemic failures that went uncorrected. The NC's management failed to take immediate corrective action even when evidence of quality and regulatory non-compliance and large-scale fudging of data surfaced.

In the light of this judgment, the threat of reputational damage to Indian pharma is very real, considering India's huge stakes in global generics markets. Indian generics account for a 30% share of the US market and its pharmaceutical exports are poised to rise to about \$20 billion by 2020. This is indeed a wake-up call for the entire Indian pharma industry for collectively working to protect its hard-earned reputation through demonstrated action.

However, the NC's story is not an isolated incident in the larger pharmaceutical story. In recent times, large global pharma corporations have pleaded guilty to criminal and civil charges and paid up huge fines that endorse the critics' claim that problems are endemic in the sector.

Take the case of a leading global multinational. On July 2nd 2012, the MNC pleaded guilty to marketing drugs for unapproved uses and failing to report drug safety information to the U.S. Food and Drug Administration (FDA) and paid a \$3 billion fine to settle criminal and civil charges with federal and state governments stemming from illegal activity over 10 years. The company was fined for its misdeeds in inappropriately marketing two of their anti-depressants brands, for withholding information on the cardiovascular risks of a diabetes drug that has been shown to cause heart attacks, and for promoting an inhaled lung drug, to patients with mild asthma even though it wasn't approved or appropriate for them.

Moreover, what has shaken most industry observers is the prosecutors' evidence that the MNC had been allotting over half a million dollars a year to its district sales representatives to offer doctors regular golf lessons, fishing trips, and basketball tickets while promoting the use of an antidepressant drug brand in children. The company also orchestrated the publication of a "misleading," ghost-written study purporting to show that the anti-depressant drug helped children when evidence suggested the opposite. Despite the large fine, \$3 billion is far less than the profits made from the drugs. A diabetic drug has made \$10.4 billion in sales; one anti-depressant drug took \$11.6 billion while another's sales were \$5.9 billion during the years covered by the settlement, according to IMS Health, which tracks information for the pharmaceutical sector. Since the profits from bestselling drugs far dwarf the fines handed out, it appears that for Big Pharma, crime pays!

Why good managers make bad ethical choices?

If one analyses the various cases, they have a lot in common, though the individual stories are different. The key issue is unethical leadership behaviour. Central to the problem are the questions of human behaviour and human judgment applied in ordinary day-to-day situations. One has to ask "How is it that usually honest, intelligent, compassionate human beings could act in ways that are callous, dishonest, and wrongheaded?" How is it that leaders risk their personal reputations and those of their organizations by making choices that are clearly flawed?

Saul Gellerman in his article "Why Good Managers make Bad Ethical Choices" (Harvard Business Review, July-August 1986) identified four rationalizations that lead to bad decisions. He states that managers believe that:

1. The action is not really unethical or immoral ("everyone does it");
2. The action is in the best interests of the company (growth, profits, maximizing shareholder value, and so on);
3. The action is unlikely to be detected (possibly the worst assumption); and
4. Because the action helps the company, the organization will condone and even defend such action.

In case of the NC one can see that there were issues of unethical leadership behaviour. In spite of repeated information that violations were widespread, no action was taken. The national company has acknowledged that in 2003 and 2005 it was informed of current good manufacturing practice (cGMP) violations by consultants it hired to conduct audits at two of their facilities but did not act to rectify them. Jim Collins in his work "How the Mighty Fall" notes that 'hubris born of success' and 'undisciplined pursuit of more' provide the foundation for Gellerman's four rationalizations. While Robert Simons argues that performance pressure,

temptation and opportunity combine to form a dangerous triad (Levers of Organization Design).

Perhaps all of these were in force in the NC's case, and in all the other cases. The combination of beliefs, performance pressures, temptations and opportunity, together with the pursuit of "more" lead to unethical choices and thereby lack of values based leadership behaviour.

The future of pharma industry depends on value-based leadership

Pharmaceutical companies face grave ethical quandaries as they attempt to balance a duty to promote public health while maintaining profitability. With increasing competition and pressures on profits, the focus is often on maximizing market share and bottom lines even if it means cutting corners. Though responsible for ensuring public health, some pharmaceutical companies have betrayed the common good with unscrupulous practices such as false drug quality reporting and unsafe production practices in their pursuit of higher profits. Improving regulation is often touted as solution to this crisis of credibility. While regulation is important, no amount of regulation can stop fraud. Policing has its own limitations.

What is needed is corporate integrity. Corporate integrity is about leadership culture. It is about a culture of integrity, where unethical behaviour cannot be condoned and rewarded. It is about building an ethical atmosphere where leadership is accountable to its stakeholders; where ethics is not merely a postscript taught in isolation but is woven into day to day decision-making.

Value-based Leadership

Value-based leadership is defined as connecting organizational goals to employees' personal values. In a Forbes magazine article by Kellogg professor, Harry M. Jansen Kraemer Jr. described it simply as 'doing the right thing'. He said "As I tell my students, becoming the best

kind of leader isn't about emulating a role model or a historic figure. Rather, your leadership must be rooted in who you are and what matters most to you. When you truly know yourself and what you stand for, it is much easier to know what to do in any situation. It always comes down to doing the right thing and doing the best you can." Mussig argues that "values-driven leadership sets the function of the relationship as putting values into practice" and "the function of the leader may be to bring values to the relationship.

In today's increasingly complex world, leaders and followers are often confronted with ethical dilemmas and moral mazes. They are unsure how to act and what to prefer. Recognizing a situation as an "ethical" one is the first, critical step in the process of ethical decision making. In short, ethical deliberation implies ethical detection states Wittmer.

Value-based leadership is defined as a relationship between an individual (leader) and one or more followers based on shared, strongly internalized ideological values espoused by the leader and the followers' strong identification with these values. Ideological values are values concerning what is morally right and wrong. Such values are expressed in terms of personal moral responsibility, altruism, making significant social contributions to others, concern for honesty, fairness, and meeting obligations to others such as followers, customers, or organizational stakeholders.

Ethics and values in leadership are thought to be uniquely important because of the impact leaders have on the conduct of others through their behaviour and decisions and on organizational performance and effectiveness. Leaders have visible positions of authority, the responsibility for shaping formal organizational policies, the opportunity for on-going interactions with employees and control over rewards and punishments. Hence, they should play an important role in influencing employees' ethical and

unethical conduct. By being role models, leaders can influence followers by demonstrating high ethical standards in their own conduct and by using the reward system to teach employees about the outcomes of ethical and unethical behaviour in the organization. The reverse is also true. Leaders can be poor role models as demonstrated by their choices, decisions and behaviours which are often embedded in their value system. The higher the rank of the leader in the organization, the greater is the authority and the ability to influence subordinates.

Leaders demonstrate values awareness by having a concern for:

1. The collective good of the group,
2. The impact of both means and ends,
3. The long-term and not just the short-term, and
4. The perspectives and interests of multiple stakeholders

Value-based leadership competence is to put values into practice. Kavathatzopoulos defines it as a psychological skill, a leader's ability to treat values-related conflicts in the best possible way for all parties concerned, knowing how to think, how to analyse actual cases, how to make decisions and how to solve problems on the basis of values. It also implies self-confidence and willingness to execute difficult decisions, and to support and sustain value-based positions.

What value-based leaders need to do?

In order to truly change paths and become more value-based, organizations have to orient their leadership teams and redesign the organizational culture to answer hard questions.

1. Each one must discern and clarify for themselves the foundation on which their ethical decisions are based. One needs to decide what is negotiable and what is not negotiable; what is acceptable and what is not acceptable; and why?

2. Leaders must also appreciate that people make decisions based on the values they hold dear. Everybody speaks their "truth". While it may not be THE truth, it is their truth, and their truth is based on what they value. This does not have anything to do with what is right or wrong but with what is truth for an individual.

3. Leaders must also recognize that ethical principles are concerned with how things should operate and not with how they currently operate. The implicit moral obligation is not merely to understand ethical principles but to individually integrate them in order to guide their followers to the desired end.

4. One has to also accept that the most difficult decisions to make are those in which there is a conflict between two principles one deeply believes in. For example what is more important – trust or loyalty, justice or mercy? The next part is to facilitate the resolution of that conflict.

5. Leaders also need to determine beforehand what their priorities are, realizing that a lot will depend on the situation. The goal here is not to "water down" one's priorities based on the situation, but rather how will priorities be applied and communicated based on the situation.

If leadership has to be effective it is vital that leaders take the time to get the necessary knowledge and training to be more effective and develop strategies to anticipate their response to ethical choices.

Conclusion

While meeting the challenges of conducting business in the sector, both specialty drug makers and generics manufacturers must reinvent their methods of managing various stakeholder groups to fully capitalize on the possibilities that lie ahead. The principles of values-based leadership provide an excellent framework to capitalize opportunities while balancing public health and corporate profits.

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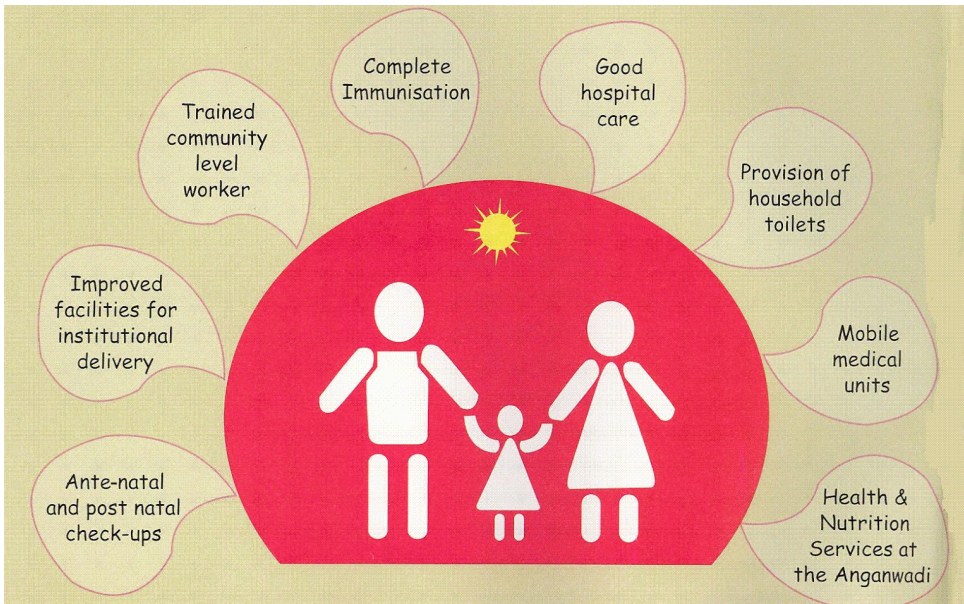
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Ms. Ruth D'Souza, Executive Director of Interlink Marketing Consultancy, is a renowned management consultant and a motivational speaker. With the expertise and experience of over three decades in pharma, animal health, diagnostics, nutra & wellness space, she has spearheaded number of strategy consulting and competency development interventions at many NCs and MNCs to improve their business performance. She is also a regular writer on management. Currently, she is pursuing her Ph.D. in the same subject.



Innovative Way to Reach the Indian Rural Market

- Interlink Knowledge Cell



Business models for rural marketing will differ to a great extent as the rural scenario is also different from the urban one. Companies that want to exploit this opportunity need to bring in better, innovative solutions. Several aspects need to be considered when formulating the right strategy to enter the rural markets. This article offers a glimpse into what goes into planning a successful rural marketing strategy and how Novartis' Arogya Parivar has seen great success in the rural market.

Different business models, unlike the conventional ones, will be used for marketing in rural India. This is because the scenario in the urban areas is far removed from that in rural areas. There is a need to bring in innovation, as 'innovation' is the application of better solutions that meet new requirements, unarticulated needs, or existing needs of the market.

This is accomplished through more effective products, processes, services, technologies, or ideas that are readily available to markets, governments and society. So, the focus has to be on innovative marketing strategies designed especially for rural India.

Expanding to rural markets is still not an easy task. It has been a great challenge for FMCG (Fast Moving Consumer Goods) companies as well. It is not necessary that a business model which was successful in the urban markets be equally successful in the rural markets too. The important fact to remember is that every market is unique and the market penetration strategies should also be **unique**. There are a number of aspects which need to be considered before formulating a marketing strategy which would be most successful in the rural markets, as outlined below.

1. **Hygienic conditions** – The hygienic conditions in rural India need to improve greatly as almost 33% of the diseases prevailing in these areas are due to unsafe drinking water and poor sanitation. The numbers in rural India are shocking as it is dominated by acute illnesses as 80% of the population here lacks sanitation. Over 122 million households do not have toilets.
2. **Quality of Water** – Water and health will always be closely related. The unsafe water available in the country is responsible for almost 7.5% of total deaths in India. A report by Food and Agriculture Organisation (FAO) and UNICEF states that about 74% of the rural population does not use any water disinfection method.
3. **Disease Burden of the country** – The majority of deaths and disability in India are due to injuries and chronic diseases such as CVD, mental health disorders, diabetes and cancer. These diseases are prevalent much more in poor and rural populations. These diseases are estimated to contribute to the disease burden of the country in the next 25 years.
4. **Awareness of disease prevention** – The level of literacy in rural India is often quite low. The people lack awareness about the different diseases and how they can be treated. Here it should be noted that the chronic diseases and medical treatment assistance in rural areas is lacking.
5. **Availability of doctors** – It should not come as a surprise that the healthcare infrastructure in rural India is very much underdeveloped as compared to urban areas. In rural areas, qualified allopathic doctors are rare. Here, the doctor patient ration is as low as 1:20,000 as compared to 1:2000 in urban India. WHO norms state that the country needs 600,000 doctors to meet the recommended ratio of 1:250.
6. **Availability of drugs** – Another vital aspect is the question of necessary drugs being available. There is a doubt about the quality of the drugs as well. Numerous cases of counterfeit drugs being available in the rural markets have been brought to light.
7. **Affordability** – The affordability in rural areas is often low and many patients earn a very basic daily wage. One must remember that with respect to income allocation, healthcare is a low priority and the healthcare expenditure of an average consumer comes to 7% only. Almost 80% of the rural population works on a daily wage and the income level is less than USD 1.78/day.
8. **Dependence on seasons** – Even today, farming is majorly dependent on

seasons and since a majority of the rural population is into farming, an unseasonal rainfall or climatic change will directly affect their income.

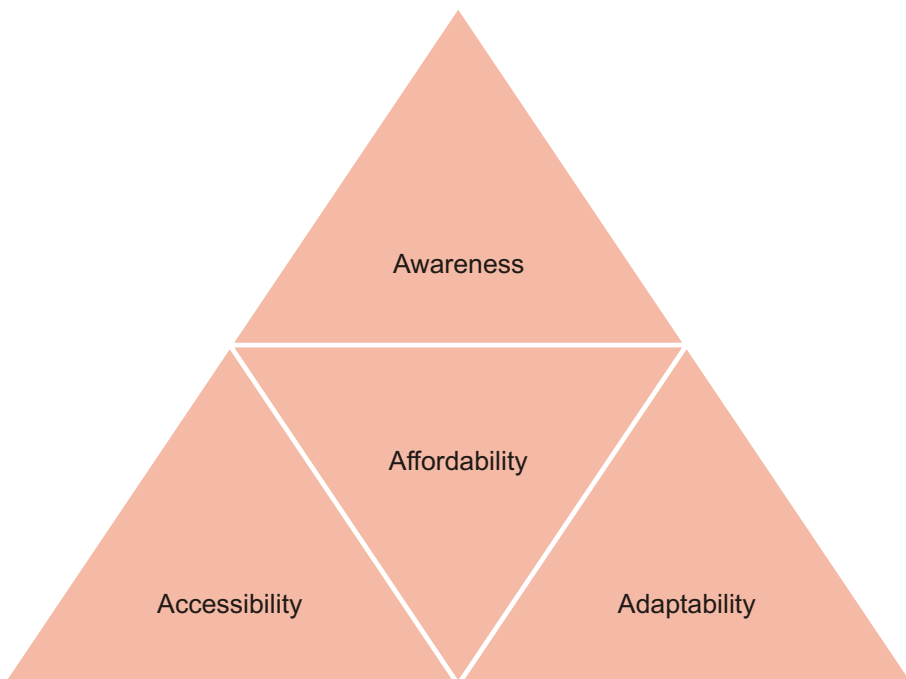
9. **Development of rural India** – The most important aspect that overlaps all is the development of rural India. It is only fair that the people in rural India enjoy the same quality of life as those living in suburban and urban India. Almost 69.90% of the total Indian population lived in rural India in 2010 according to the World Bank report published in 2012.

Even as a majority of the Indian population resides in rural India, the rural pharma market accounts for just 17% of the total industry sales with a value of just \$ 2 billion in 2010 in comparison with the urban markets. If the growth drivers are well considered, then in the next decade, rural markets can grow at a CAGR of about 15% to 20% to reach an estimated value

that is anywhere between \$ 8 billion to 12 billion.

For this reason, a number of issues need to be given a critical look. Over the years it has been observed that there is a large gap between the number of people residing in villages that need the right treatment and the quality treatment and medicines actually reaching out to those villages. Here, access to medication is extremely poor; according to a PWC report, as little as 20% of the population have proper access.

These challenges can be the keys to unlocking the potential which the rural Indian market has for the pharmaceutical industry. Also, in the near future, healthcare conditions will improve as well as the rural consumers would have more disposable income compared to that in the past. A great example of the favourable results through this foresight and measures taken to exploit this opportunity is Novartis' Arogya Parivar.



Source: Novartis Factsheet

Figure-1: Arogya Parivar's 4A Model

Novartis – Arogya Parivar

Arogya Parivar has come a long way since its inception in 2007. The programme started returning profits within just 30 months since it began and the sales increased by almost 25-fold. Thus, the Arogya Parivar was considered commercially viable and it could be expanded in India or anywhere else.

So far, the programme has enhanced the quality of healthcare for over 42 million people in almost 33,000 villages. Here are a few aspects of the program discussed in details.

Arogya Parivar began with a mission “to improve healthcare access for the under-served poor located at the 'bottom-of-the-pyramid' using a social-business approach”. The approach adopted by Novartis is such that through Arogya Parivar, they provide a complete healthcare solution and not just access to medicines. The framework of this model is based on **four 'A's; Awareness, Accessibility, Affordability and Adaptability.**

Under **Awareness**, patient awareness and physician education are the two initiatives undertaken. Local health educators make the patients in rural areas aware of the diseases and therapies. Alongside, the cell supervisors provide disease and Novartis portfolio education to physicians.

Under **Adaptability** based on the local diseases, the portfolio and marketing is customized. Also, the team involves local faces that people can relate to.

To improve one of the major challenges, **Accessibility**, distribution is improved by setting up Arogya local sub-distributors and through doctors conducting health camps.

For improving the **Affordability**, small packs with smaller price points are customized; making them available to the rural population easily.

Today, this program has become a tremendous success. There are over 270

cells in 11 states with more than 530 educators and supervisors. Arogya Parivar is connected with 22,000 doctors and 18,000 pharmacies and has reached out to 33,000 villages so far. This program serves another purpose of offering jobs as well as skills enhancements to health supervisors and educators who are often local faces. Its success has spurred such initiatives in some Asian and sub-Saharan countries.

Some of the important lessons from Arogya Parivar

1. The less privileged would spend on health as well if counselled.
2. More often than not, rural dwellers would opt for strong and fast-acting drugs.
3. They purchase in small packages because of low disposable income.
4. There is great interest and good recall of education programs and health camps.
5. For success, the local parameters such as population density, their purchasing power, reach of roads and efficiency of free government programs should be considered.
6. Word of mouth is a great influencer and trust can be built over time.
7. Monitoring and managing the patient flow is important, right from awareness to compliance.

So, keeping in mind all the lessons we have learnt from Arogya Parivar, expansion into the rural markets can accelerate volume growth for the Pharma industry and companies such as Ranbaxy Labs, Torrent Pharma, Sanofi Aventis, Lupin, Alkem, Cipla and others who have attempted to reach the rural markets of India by adding dedicated sales force.

Conclusion

A number of companies have been unsuccessful in the arena. It is a challenge for a business to enter into rural Indian market. However, Novartis' business model has worked well.

So, companies can draw learnings from the model with regards to:

- Increased brand reach
- Increased brand value
- Increase in selling units
- Scaling of operations

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Interlink Knowledge Cell comprises of a team of experienced subject matter experts in various domains like Pharma, Nutra, Biotech, Animal Health and Wellness, to provide insights and business perspectives focused on Management, Marketing, Sales & Training areas.



Which is More Important for Pharma – Vitamin G or Vitamin T?

- Dr. R. B. Smarta

Social Awareness of Counterfeit Drugs

- Interlink Knowledge Cell

Which is More Important for Pharma – Vitamin G or Vitamin T?

- Dr. R. B. Smarta

Even as the Indian pharma market is among the top five pharmerging markets in the world, the companies are faced with a grave dilemma. For sustainable success, should a company opt for just growth or transformation? More often than not, in the pharma industry, growth and transformation go hand-in-hand as transforming people would bring in growth. Here are some thoughts which will channel your views in the right direction and help you make the proper decision for your company.

The Indian pharmaceutical market is one among the five pharmerging markets in the world. Today, it is at the forefront in a number of specialties which include manufacture, development as well as technological aspects in producing the complex drugs. In 2013, the Indian pharma market was valued at ₹ 72,068 crores and it is estimated that the market grew at 10% with respect to value.

This growth is the result of several reasons such as changing demographics, evolving disease profile, good level of economic growth which leads to higher disposable income, improvements in the healthcare infrastructure and better healthcare financing.

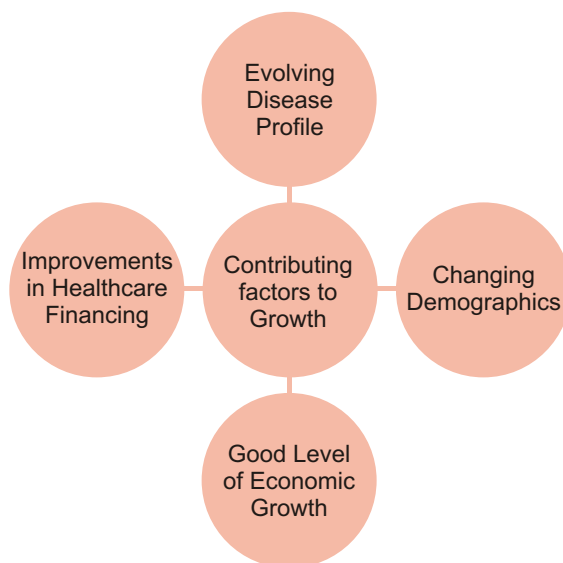
Contributing factors to growth

Evolving disease profile

The population in India is growing rapidly. Alongside, the disease profile is also evolving drastically. Basically, there is a sharp increase in the life-style diseases such as obesity, diabetes, cardiovascular problems, CNS disorders and other chronic diseases, etc. This is due to the unhealthy eating habits, increasing stress in daily life, etc.

Changing demographics

There is a visible change in the demographics of the country. The largest demographic group today is of 15-34 years at 435 million. The next group is of 1-14



Source: Interlink Knowledge Cell

Figure-1: Contributing factors to Pharma Growth

years standing at approximately 345 million and 35-59 years coming in at approx. 325 million.

Good level of economic growth

With the improving economic growth, the middle and upper middle class is expected to grow substantially. It has been estimated that the country's middle class population would be almost 41% in 2025 as compared to just 14% today.

Improvements in healthcare financing

With the penetration into tier-II & tier-III cities, there is an improvement in the response to health insurance today. Also, the government is taking initiatives to increase the public expenditure on healthcare.

These factors will certainly give a great impetus to the growth of the pharma industry in the coming years. So, it would be appropriate to say that the major growth in the Indian pharmaceutical market would be more or less **consumption driven**.

These factors were not only favourable for the Indian pharma industry but also trickled down to the other market segments such as diagnostics, critical care and APIs. If we take a look at the other market sizes, the diagnostics market reached \$ 2.5 billion in 2012. The critical care market was estimated to have reached \$ 78 billion in 2012. The Indian API market reached about \$ 8 billion.

Even as we see the high level of growth in the pharma and its allied sectors, the **dilemma between transformation and growth** still looms over the managements' head.

Growth is more often linked with volume and it provides the capital for any business. It works more in accordance with the scaling principles. The question often asked is: should people go for growth or for transformation? The pharmaceutical industry is quite unique as growth here is not merely dependent on volume. The most important aspect in the pharma business is of **building the organisation!** The rest of the things then follow!!

Should pharmas go for Vitamin G or Vitamin T?

The most crucial task for a pharma organisation would be to find which of these two, viz. Vitamin G or Vitamin T, is the most important aspect for them?

For a company to prosper, capabilities and cash are absolutely essential. There are times when a company lacks either of these fundamental essentials and consequently there could be many problems for the business to run successfully.

If the much needed cash is available but not the right capabilities, there is little chance of growth. But even if they did have the right capabilities but were lacking cash, the company would not be able to retain good talent. So, having the right strategy which ensures a good balance between both, cash and capabilities, is essential.

In a company as big as Reliance, if cash is not a problem, hiring the best capabilities is very easy. But, transformation may not be happening here. Growth is all about getting the right numbers. On the other hand, as per the conventional belief system of management, transformation is with respect to people: the **capabilities, competencies and calibre!**

Trading and growth would involve numbers, as this is the basis of Business to Business (B2B) companies. It can be observed in B2B businesses that relatively fewer people are involved. This is certainly not the case in the pharmaceutical and healthcare businesses, as they are more people-intensive. So, in these businesses, there will not be any growth numbers if the teams do not perform. There are a few parameters involved for the employees to contribute more and perform well to bring in the numbers. The most imperative factor here is the ever evolving environment.

This constantly changing environment brings about the need for transformation from one stage to another. Thus, it is crucial to conduct continuous training and monitoring. In the pharmaceutical and

healthcare business, it is absolutely necessary to build teams and ensure they are well taken care of. Only then would it be possible to gain the desired growth. So, with regards to the pharma and healthcare businesses, it would be appropriate to conclude that **through transformation there would be sustainable growth**. If a business concentrates only on growth numbers, then there is a likelihood of achieving only short-term gains.

If we want to draw a comparison then a pharma business is very similar to the farming business which is consistent and steady but slow as well. This business requires immense patience, just like in the agriculture business, where one ploughs the field, sows the seeds, waters the field and then waits for the crop to grow. Pharma would also involve numerous time-consuming stages from R&D to brand development. A pharmaceutical business is not one to give immediate returns, unlike B2B businesses.

In case of B2B, the revenue comes from the products. A science-based business like in the case of Pharma companies, the business comes from building valuable relationships, be it within the team, with their customers or consumers; it also has a customer centric approach. Most B2B businesses today are family enterprises. They prefer being volume players unlike the 'value' players of the pharmaceutical industry.

The earlier pharma model was a **value migration model**. In the value migration model, through R&D a patent was created and then the created value was migrated to the market. There was a monopoly of 10-

15 years. But this is not the case with other businesses.

A management risk is involved here, so it is necessary to undergo transformation continuously. It is important to have a good structure in place as pharma demands team performance. (If a team performs well, then the company also does well). So, in the pharma industry **transforming the mind-set** is absolutely crucial. This transformation can be achieved through augmenting talents, knowledge and skills.

Talent comprises of the capabilities exhibited by an individual naturally on the basis of experiences, knowledge gained early in life or the individual's innate one. Skills are described as the capabilities an individual acquires through experience and learning; it also tells the individual how a job or task is to be done. Whereas, knowledge is defined as the capabilities acquired through experience and learning that tell us about the understanding an individual has about various concepts or data.

Bringing about a transformation in the team with respect to talent, knowledge and skills would trigger the much needed growth. Evolving a thorough strategy has to be the focus for the pharma industry as it is a qualitative one.

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Dr. R. B. Smarta, Founder & Managing Director of Interlink Marketing Consultancy, has more than 45 years of experience in the industry including over 29 years in management and business consulting. Being a thought leader, he has helped the management of number of organizations set up and grow through strategy consulting, sales and marketing effectiveness, organizational development interventions, successful mergers, acquisitions and innovative video based training packages for Indian pharma, nutra, diagnostics, critical care and healthcare domains.

Social Awareness of Counterfeit Medicines

- Interlink Knowledge Cell

Counterfeit drugs have been a grave issue which has often been side-tracked. It has to be brought under focus as it directly affects human lives. Social awareness initiatives can be adopted to reach out to the masses, so that they are made aware of how counterfeit drugs can affect lives. Social marketing would be a great channel as it allows the stakeholders to reach out to one another easily and effectively.

Manufacturing of counterfeit or substandard drugs is a big problem that has often been under reported. It has been particularly affecting the developing countries and it has simply been growing in magnitude. Counterfeit drugs result in increased morbidity, mortality and loss of confidence in medicines and health structures.

There is no clear definition of “Counterfeit Medicines” in the Indian Pharmaceutical Industry. Medicines that are adulterated, sub-standard, mislabelled, trademark infringements and similar looking products (pass offs) are perceived as counterfeit medicines.

More often than not, the pharmaceutical industry and government feel that alerting the health staff and the public would damage the sales of brand name products. There has been an on-going debate about publicizing the cases by issuing public health warnings as it is a problem harming the patients. In the long term, keeping the public in the dark would also not work in favour of the pharmaceutical industry.

This is where **risk communication through social marketing** can be adopted as a vital tool to communicate public health warnings. Here, risk communication initiatives can be undertaken through social marketing to save many human lives.

Social Marketing – What is it?

The basic definition of the term 'social marketing' is that it involves applying the 4P's of commercial marketing, viz. Product, Price, Promotion and Place, and giving it a social twist. Through marketing, marketers

convince their audience to buy a product. Social marketing takes this concept one step ahead. Through social marketing, people are convinced about adopting behaviour or a particular product that would improve his/her quality of life and the larger community in general.

Social marketing is defined as the design, implementation and control of programs calculated to influence the acceptability of social ideas. It involves social considerations of product planning, price, communication, distribution and marketing research. In other words, it is employing skills of marketing to aid the social action efforts into programs which are designed and communicated in an effective manner to get the desired response from the audience.

Studying the target audience and designing the right product for them is also an important component of social marketing. Here, the seller should be able to 'package' the social cause in such a way that their target audience finds it appropriate. So, it becomes evident that designing a product in the social arena is certainly more challenging in comparison to the business marketing.

When designing a social marketing campaign, it is vital for a marketer to remember certain factors. First, he has to define the change being sought through the campaign, which may bring a change in values, behaviours, beliefs or a mix of all. The second factor is the target audience has to be aptly segmented and lastly, the social product that is designed for every market should be buyable. The product has to primarily serve the social cause.

Risk communication through social marketing

Suzanne Frew of the Frew Group defines social marketing of risk communication as a process of communication through social marketing for sending a risk message to a target audience by learning their cultural identifiers and crafting a customised outreach approach that addresses their uniqueness.

In the last few decades, risk communication has been done using the social marketing channel all over the world. One of the successful risk communication campaign undertaken in India through social marketing is the polio eradication campaign. The success of this campaign was evident when not a single case of the polio infection was reported for the second consecutive year last January. India has since been declared a polio-free nation by the WHO.

How can social marketing be adopted to tackle Counterfeit Drugs?

International health organizations such as the World Health Organization (WHO) define a counterfeit drug as “A medicinal product which is deliberately and fraudulently mislabelled with respect to its source and/or identity.” To know more about the issue of counterfeit medicines as perceived by the stakeholders, Interlink undertook a case-study in India for the WHO.

There has been no statistical data available or no scientifically designed investigations undertaken in India to know about the extent of counterfeit medicines. Interlink carried out a survey for this case-study and on the basis of the thoughts from the stakeholders, it was concluded that many of the respondents felt that in India the range of counterfeit drugs is somewhere between 10-15%. Moreover, a large number of the stakeholders believe that counterfeit drugs were being manufactured on a national level. This issue was prevalent on a larger scale in North and East of India in the states of Uttar Pradesh, Haryana, Punjab, Uttar Pradesh, West Bengal and Assam.

Furthermore, the respondents feel that counterfeit drugs are prevalent in the lifestyle therapeutic as much as in acute therapeutic groups. Cases of counterfeit drugs are more when it comes to fast moving drugs. It was disheartening to see that economic concerns were dominating social issues as the level of concern for the threat to human life was not the same across all stakeholders. The regulators were the only stakeholder who considered threat to human life as their major concern.

Evidently, the survey showed a lack of synergy between the concerns faced by the different stakeholders over counterfeit drugs. For the industry and trade associations the primary concern is the loss of image and reputation; for pharma companies it is loss of image, sales and customers.

Many respondents felt the need to have a common platform where the high stakes of each stakeholder were considered and a **collaborative, co-operative initiative** has to be undertaken where the concerns of all stakeholders can be balanced to tackle the issue of counterfeit medicines. Besides such initiatives, it is necessary to involve doctors and patient bodies into this initiative.

Here is a case-study on a successful social marketing campaign about risk communication in India.

Polio Eradication Campaign

Earlier in 2013, the success of the Polio Eradication Campaign was evident as not a single new case of polio was registered in India for two complete years. It was a moment of pride for India as well as the entire global health community when the country overcame this historic public health challenge, leaving the list of countries where polio is still endemic viz. Nigeria, Pakistan and Afghanistan. The last case reported of polio was on January 13, 2011 of a two-year-old girl being paralysed by the virus in the Howrah district of West Bengal.

International organisations such as the World Health Organisation, Rotary International, the US Centre for Disease



Polio Campaign in India

Control and Prevention, and the United Nations Children's Fund, initiated a global polio eradication campaign because in 1988 the scenario was very disappointing. Everyday around the world, the polio virus affected 1,000 children, paralysing them irreversibly; half the number from that being afflicted in India. India started its polio eradication campaign in 1995 after gaining the necessary political will, support and man-power.

But even as the mass eradication campaign started, there were widespread rumours and other challenges from the sceptics. There was a notion that the vaccine caused illness and infertility. So, to garner awareness and encourage masses to give vaccines to their children, a large scale public health education and advocacy campaign was initiated.

But it was clear that giving information alone was not enough to bring in social change. So, advertisements were made by taking famous personalities, in this case Amitabh Bachchan (in case of India) to give out the message 'Do boond zindagi ki' or 'two drops of life' to persuade people to vaccinate their children below the age of five against the polio virus. Besides the TV ads, other initiatives included giving ads in

Hindi newspapers, setting up almost 1,000 kiosks in key transit points, distribution of posters, handbills, door-to-door counselling and more.

This model of advertisements and government buy-in has been hugely successful here. India was recently certified as totally free of polio after it completed three full years without any case of polio being reported.

To conclude, the one affected by consumption counterfeit drugs is not just the consumer but also the reputation of the pharma companies. Reported cases of counterfeit drugs cause severe damage to the brand image and trust created by the affected company. The survey Interlink conducted showed that patients and doctors are the least aware of the existence of counterfeit drugs and this situation only worsens in the semi-metros and rural areas. The report also stated the thoughts of many key opinion leaders of the industry who felt that it was absolutely crucial to educate the patients about the existence of counterfeit drugs.

Serious thought needs to be given on how to bring about awareness of counterfeit drugs. Models such as the Polio

Eradication Campaign or the White Revolution started by Dr. Verghese Kurien are just a few successful models that serve as a great example.

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The case-study discussed on counterfeit medicines in the article is **one of Interlink's** many projects done for a global health organisation fighting for a disease-free world.

Interlink Knowledge Cell comprises of a team of experienced subject matter experts in various domains like Pharma, Nutra, Biotech, Animal Health and Wellness, to provide insights and business perspectives focused on Management, Sales Marketing & Training area.



Opportunities in the Pet Care Market

- Interlink Knowledge Cell



The Pet Care market in India as well as the world over has received a great impetus. An increasing number of people opt to have pets in their homes and this has spurred the need to have special pet care products, services and more. This article showcases the growing pet care industry and its potential, as it can be a great avenue for companies to expand into.

World over, the animal health industry continues to boom, especially the pet market as there is a visible rise in the pet ownership as well as spending.

The global animal health industry reached \$ 22.5 billion in 2012. This trend is witnessed in India as well. The Indian animal health industry accounts for almost 2.2% of the global market and is estimated to be anywhere between ₹ 2800-3800 crores. On the global level, the pet care industry is expected to reach \$ 97 billion in 2014 and approximately ₹ 800 crores in India by 2015 (up from ₹ 368 crores in 2011), as per the global research firm Euromonitor International.

This increase in the pet care industry is a combined result of changing lifestyles and economic growth. The attitude of people towards their pets has also evolved. Pets are now called 'companion animals' and are even treated as a beloved member of the family. Many consumers are willing to cut down on their discretionary spends but not on compromising the needs of their companion animals.

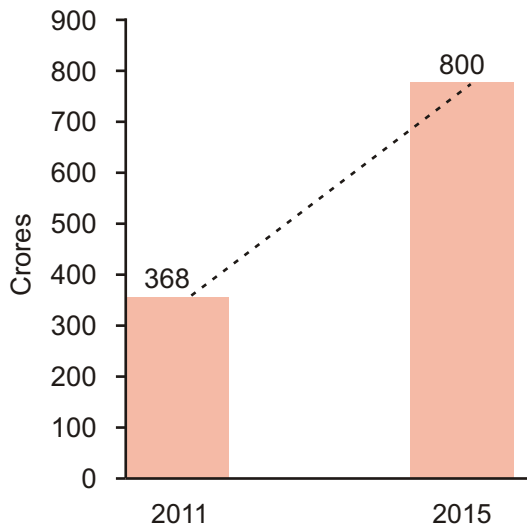
The demand for all products from toys to grooming products such as shampoos, harnesses, collars, etc. has given an impetus to the pet market. It is a great

opportunity for pharma and animal health companies. So the pet care market in India is gaining a lot of importance since the manufacturers are focusing on production of specialised products and such formulations.

The Companion Animal Health Market

The 'companion animals' market has numerous opportunities to offer especially in formulations. The current scenario is due to the developments of the last few decades. Most advances, with regard to active ingredients or even delivery technology, have been in the much larger market of human healthcare products. In the companion health market, the advances have been majorly because of veterinary demand for products that are simple to administer. They also have the aim of maximizing owner compliance, so that the prescribed course of treatment suggested by the veterinary professional is complete. The fact that this market is a lucrative opportunity is seen by the number of approvals of products made for companion animals.

Since 1992, there has been a growth in the market for companion animal health products by about 2.5% per annum in nominal terms. In 2009, the recessionary conditions had a negative impact on the market. But it is likely to stabilise when the



Source: Euromonitor International
Figure-1: Pet Care Industry in India

global economic conditions improve. Almost 75 % of the global animal health market is in Europe and the USA. Five of the top ten markets in the world are in Europe, viz. France, Germany, Italy, Spain and United Kingdom.

US, Japan and Brazil are the top three countries when it comes to spending on pets, according to Euromonitor. Presently, India is on the 49th position but is a fast growing market with just over 20% growth per annum. It has the potential to reach the top league. In 2012, the pet food market was expected to reach ₹ 350 crores as Indians spend the most on this category. Pet healthcare came in as the second largest category in 2012 to reach ₹ 45 crores.

The animal health market globally is consolidated. A large share of the market is controlled by the top ten players, of which Merck and Pfizer have been the largest for many years.

There is a great increase in the rate of companion animal ownership in many other countries apart from India, including Brazil, Mexico, China and Russia. There is also a rise in the expenditure on companion animals. For instance, the spending on companion animals reached an estimated \$ 51 billion in 2011 from \$ 23 billion in 1988. About 25% of their amount was being spent on veterinary care (medicines as well) and another 20% was on over-the-counter (OTC) products. Food, accessories, etc. comprised of the rest of the expenditure. This trend was replicated in other countries too.

Various Market Segments

Companion animals now live longer and more often than not, their care is similar to human healthcare trends. There are similarities in diagnosis and disease monitoring in veterinary medicine with particular emphasis on companion animal healthcare. A clear parallel can be drawn between companion animals and their owners when looking at particular conditions such as obesity and its consequences. So, it would not be surprising to see that the companion

animal health segment is much like the human pharma sector. When we take a look at the new chemical entities, we find that numerous innovations in human medicines are tailored to companion animals.

One of the biggest challenges in the companion animal health market is infection (viral, bacterial & parasitic). Some conditions being diagnosed often are chronic, age-related conditions such as congestive heart failure in dogs, chronic kidney disease in cats, endocrine diseases like hyperadrenocorticism in dogs and to some extent in horses, hyperthyroidism in cats, diabetes mellitus in dogs and cats and osteoarthritis in companion animals. Yet this market lacks epidemiological studies on a large scale which can define prognostic end points for better evidence based therapeutic decisions. Even as efforts are being made in this direction, the need for well-designed and controlled evidence based studies would remain.

Evolution in the Market

There was a big difference in the market scenario for companion animal products 20 years back. At the time, the major growth drivers were infectious agents – viral, bacterial, and parasitic. This led to the biologics or vaccines being developed and established in the market against viral and bacterial agents as well as antibiotics and parasiticides for treatment of internal and external parasites. Currently, parasiticides and pharmaceuticals which include anti-infectives, etc. are the largest category. Biologics come on next; but infectious diseases remain a vital segment in companion animal health world over.

Future opportunities

A great opportunity in the companion animal health market would be bringing in the marker-vaccine type technology. This technology enables differentiation between vaccinated and infected animals using a simple patient-side test as it would show a different immune response to the vaccine from that of the infection. The livestock market already has this technology available and would be a most

likely introduction to the companion animal arena. At present, approved antiviral drugs are not available for use in companion animals.

Another crucial factor would be vector control as in the case of human medicine. There is an emergence of therapeutic vaccine technology too. For instance, veterinary medicine is on the progress path as the US FDA has given conditional approval to the first therapeutic cancer vaccine for treating melanoma in dogs. The shift in the approach from curative to preventive treatment is the most likely reason for an increase in the vaccines market.

Apart from all these, the need for pet products and services such as grooming, crèches, specially cooked food as well as event organising for companion animals is increasing. Industry experts estimate that the average expenditure on pets per month is over ₹ 10, 000. This would comprise of food, daily hygiene care, vaccinations as well as other services such as spas.

As the outlook towards pets is also changing and they are considered an important part of the family, the need for pet care is getting more sophisticated. Pet owners not only spend on pet food but also look at pet products for their pet's healthcare, grooming and leisure needs. Pet services – salons and spas – are becoming a rage now; so the services augmentation is not too far behind. Numerous pet care chains such as Cho Chweet and Scoopy Scrubs are giving tough competition to standalone salons. Cho Chweet has opened six operational branches in just two years and the set up costs an average of ₹ 12-15 lakh each. Each outlet had about 40-80 pets a month coming in which soon grew to 140-150. In 2010, the each spa generated ₹ 2.5-3.5 lakh in revenue per month and has an estimated growth of almost 50%.

Interlink is a trusted strategy consulting firm providing specialized expertise to Pharma & Health Industry.

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Treatments like cleaning of ears or nails, complete makeovers which include everything from a bath to an aromatherapy massage are available for pets and the rates vary as per the breed. Other out-of-the-box services include pet-friendly taxi services or even a specialised bakery.

A healthy double digit growth is seen in the sales of international brands of pet foods like Mar's Pedigree & Whiskas, P&G's Iams and Eukanuba, Nutri-Vet and Viobin according to industry experts. These products have entered the Indian market only in the last few years.

“The wish to give their pets a good lifestyle is spurring the global brands to enter the Indian pet care market and the industry to become more organised as pet owners are increasing their spending”, says Bharat Pittie, MD, Bharat International Pet Foods, the sole distributor for several global brands of pet foods in India.

Launching innovative pet accessories, like touch-sensitive feeding bowls that load food when touched by a pet, would prove to be another opportunity for companies. Pet owners not only look for convenience but are concerned about hygiene too which would draw the pet owners towards specialised products. The pet care market is showing slow but steady growth.

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