Sylvester Feddes – Country President, Novartis Brazil



Global leaders must elevate our collective engagement. We have a responsibility in an increasingly volatile world where patients continue suffering illness and substantial unmet medical needs persist

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Sylvester Feddes, Country President of Novartis Brazil, outlines the country's rise as a top global market driven by strong public-private healthcare infrastructure and vast unmet needs. With nearly 100 active clinical trials and major launches ahead across cardiovascular-renal-metabolic, immunology, neurology and oncology, Novartis is pairing scientific innovation with new access models like risk-sharing agreements with the public system. His vision is to make Brazil a hub for growth, research and talent while doubling patient impact through sustainable partnerships.

As Novartis marks 90 years in Brazil, how does this legacy shape its strategy for the next decade as Brazil becomes Latin America's leading pharma market?

Brazil has emerged as an extraordinarily significant player not only within Latin America but on the global pharmaceutical stage. What distinguishes this market is its complexity coupled with exceptional opportunity. Brazil remains one of those rare territories where opportunities demonstrably outweigh challenges, this fundamental characteristic defines Brazil's healthcare landscape.

The country possesses a remarkably robust healthcare ecosystem encompassing both substantial private sector activity and an extensive public health system that delivers reasonably comprehensive baseline coverage. This dual infrastructure positions Brazil exceptionally well to continue expanding patient access to innovative therapeutics. Furthermore, Brazil benefits from an

impressive cadre of healthcare professionals, both clinicians who deliver direct patient care and technical experts within governmental agencies, alongside professionally managed pharmaceutical operations. This convergence creates fertile ground for sustained growth.

Our nine-decade presence in Brazil affords us the opportunity to cultivate enduring collaborative relationships. This market demands partnerships built upon long-term thinking and trustworthiness. The complexity of Brazil's healthcare challenges cannot be resolved merely by introducing products to market; success requires innovation across multiple dimensions. We are committed to delivering first-in-class or best-in-class therapeutics that address genuine unmet medical needs – what we term 'reimagining medicine.' Equally critical, particularly in Brazil, is our imperative to reimagine access. Innovation without patient accessibility yields negligible benefit.

Consequently, we are fundamentally rethinking sustainable medicine delivery models. This necessitates building trust based partnerships across the entire healthcare ecosystem. A compelling exemplar is our recently executed risk-sharing agreement with SUS (Sistema Único de Saúde) and the Ministry of Health, enabling gene therapy access through the public system. This demonstrates how cutting-edge innovation, representing the apex of genetic therapeutic technology, can reach patients sustainably within the healthcare ecosystem.

Clinical research represents another critical partnership domain. Brazil is experiencing a tremendously positive trajectory regarding clinical trial regulation, with governmental initiatives streamlining and accelerating trial implementation. This is invaluable, as Brazil ranks among the world's most ethnically and genetically diverse nations, an extraordinary asset for our clinical development programmes. We currently operate, if I am not mistaken, the largest clinical trial portfolio in Brazil, with approximately 90 to 100 active studies spanning all priority therapeutic areas and, importantly, neglected tropical diseases.

I take particular pride in Novartis being the sole pharmaceutical company consistently investing over 100 million USD annually in neglected disease research. This commitment resonates profoundly in Brazil, where many conditions like malaria, Chagas disease, leprosy, and dengue, remain endemic. We currently have a Phase II dengue trial underway. These substantial commitments to Brazil reflect how partnership extends beyond market access innovation and sustainability to encompass deep societal engagement.

PDP (Partnerships for Productive Development) technology transfer model is prevalent in Brazil. How does your gene therapy partnership differ from this framework?

The PDP mechanism involves technology transfer, whereas our gene therapy initiative represents an access partnership, fundamentally distinct approaches. This model specifically addresses high-cost, highly innovative treatments, facilitating broader population access. It bears emphasising, particularly to our Basel headquarters, that Brazil comprises over 200 million citizens, a massive population presenting substantial opportunities.

What risks do you perceive in introducing such innovative therapies to Brazil, given potential governmental volatility and policy fluctuations? How do you mitigate and share these risks?

Introducing these technologies demands a long-term perspective. If one focuses exclusively on quarterly performance metrics, such initiatives become untenable. Our medicine development timelines span 12 to 15 years, affording us the capacity and the obligation to adopt extended partnership horizons with government entities. Whilst we remain a publicly traded company requiring demonstrable results, long-term thinking enables substantive dialogue with government stakeholders regarding durable partnership structures.

This approach cultivates trust, generates mutual long-term commitment, and establishes transparency, all essential partnership elements. Whilst governmental transitions present inherent risks, our commitment transcends political orientations. We serve patients, not political factions. Healthcare and patient welfare remain fundamental. Understanding patient pathways thoroughly, combined with identifying system efficiencies that can finance new technologies, positions us advantageously.

Any government genuinely committed to improving population health and longevity welcomes partnerships that identify efficiencies to fund innovation – benefits that ultimately enhance workforce productivity and economic vitality. The principal risk would involve dramatic policy discontinuities. However, Brazil maintains a robust legislative framework, suggesting that principled actions will withstand political turbulence. Ultimately, I perceive these partnerships as opportunities rather than risks.

With Brazil already a billion-dollar affiliate and major launches ahead, which therapeutic areas will deliver the greatest impact for patients and drive Novartis' next wave of growth?

Brazil represents a large market characterised by substantial unmet medical needs. Our Brazilian operations concentrate primarily on four therapeutic areas: cardiovascular-renal-methabolic disorders; immunology; neuroscience; and oncology. Each domain presents significant growth drivers precisely because we focus where unmet needs remain greatest. This focus enables deep expertise in innovation, research, development, and commercial execution.

Brazil already ranks within Novartis's global top ten markets and demonstrates robust projected growth driven by population scale, demographic ageing, persistent unmet needs in a developing economy, and critically, our capacity to deliver genuinely innovative therapeutic solutions. Equally important is our differentiated approach to access. We are determined to introduce all relevant technologies to Brazil sustainably, necessitating close collaboration with governmental stakeholders, payers, and private healthcare system participants to ensure patient accessibility.

Large population scale, profound therapeutic expertise, and commitment to healthcare system sustainability through innovative models collectively drive this growth trajectory.

You mentioned operating nearly 100 clinical trials in Brazil. Where do you identify the greatest opportunities, and what bottlenecks constrain further ecosystem research expansion?

The opportunity is unambiguous: an exceptionally large, diverse population; impressive capabilities within premier research centres; and an evolving legislative framework increasingly favourable to clinical research. If current trajectories continue, Brazil will attract substantially more industry clinical trials – an extraordinarily important development.

Conducting trials in Brazil enables us to understand precisely how our therapeutics perform in Brazilian patient populations. This knowledge proves invaluable for market introduction strategies, informing not only treatment efficacy but access model design. We gain critical insights into care pathway challenges and access barriers. The patient experience in São Paulo differs dramatically from Amazônia, necessitating differentiated approaches.

Consequently, we are significantly investing in building clinical trial research capabilities in less represented regions – Amazonas, Amapá and Pará – ensuring nationwide capability distribution. This yields diverse patient population data and recognises that healthcare delivery in Amazônia fundamentally differs from urban centres like São Paulo or Rio de Janeiro. Such comprehensive development and testing within Brazil provides regulatory authorities and the Ministry of Health

confidence that funded therapeutics are demonstrably efficacious and safe within the Brazilian context.

As Novartis leads the 2024 Access to Medicine Index by integrating access into R&D, how is this commitment being applied in Brazil, where innovation demand is high but public budgets are limited?

I feel immense pride working for an organisation ranked first in access to medicine, as this validates our dual commitment to reimagining both medicine and access whilst maintaining healthcare system sustainability and prioritising patient welfare. Such recognition stems from deliberate strategic choices.

Consider our investment exceeding 100 million USD in neglected disease clinical research – dengue, malaria, Chagas disease, leprosy – conditions particularly problematic in Brazil. Additionally, we are expanding clinical trial capabilities nationwide, conducting extensive trials ourselves whilst simultaneously helping remote regions develop research infrastructure to sustain future trial activity.

Access represents another pillar. Genuine partnership development begins with trust cultivation – transparent, long-term, patient-centric partnerships. The gene therapy SUS integration exemplifies this approach, requiring three years of collaborative governmental engagement to establish a model providing payment predictability and risk-sharing. If treatment proves ineffective, the government incurs no ongoing costs; successful treatment triggers payment. We share therapeutic risk directly.

Clinical trials, access innovation, and trust-based partnerships constitute the primary mechanisms through which we operationalise this global ethos domestically in Brazil.

As Novartis has evolved into a pure-play innovative medicines company, where do you envision Brazil's principal contribution: growth engine, clinical trial hub, digital innovation centre, or an integrated combination?

It encompasses all these dimensions simultaneously – a multifactorial impact model. We maintain a powerful growth engine: over the past six years, we have launched 18 new molecular entities in Brazil, with an additional 18 anticipated over the coming six years. From a growth perspective, this

productivity proves extraordinary.

Regarding digital capabilities, Brazil demonstrates remarkable innovation capacity and sophisticated digital infrastructure. Given the country's geographical scale, we must evolve our stakeholder engagement models digitally. Physical presence across this vast territory remains impossible; consequently, digital communication channels – including highly developed social media platforms – become essential for reaching healthcare professionals and broader ecosystem stakeholders. We are investing substantially in this domain, increasingly leveraging artificial intelligence to optimise these technological capabilities.

Clinical research represents another element, which I believe we have addressed comprehensively.

You have articulated ambitions to build Novartis Brazil into a talent powerhouse for the global organisation. What unique capabilities can Brazilian teams contribute to Novartis worldwide?

Brazil's market complexity and rapid change dynamics cultivate distinctive capability sets: Accelerated Growth, Change Agility, Bold Innovation, Resilience & Versatility. These competencies have become universally essential given contemporary global volatility. Such capabilities are fundamental for any executive or professional, regardless of geography, and increasingly critical as the pace of change accelerates. Brazil provides an exceptional environment for developing and subsequently exporting these skills.

Beyond capabilities naturally acquired through operating in this environment, we deliberately cultivate a Novartis culture emphasising curiosity and innovation, rooted in purposeful leadership. Serving over 200 million Brazilians demands that our people maintain profound purpose regarding daily impact on patient welfare.

Novartis attracts younger talent quite successfully. Our objective involves recruiting these individuals and developing them through diverse experiential assignments and formal programmes that foster curiosity, build capabilities, and deepen purpose. Subsequently, they can advance careers domestically – our scale provides numerous opportunities – or internationally. Approximately 150 Brazilians currently work in Novartis operations outside Brazil, which is tremendously valuable as it enhances team diversity wherever they serve. Diversity fundamentally enables creativity and superior problem-solving.

Increasingly, we observe international talent seeking Brazilian assignments, which is noteworthy. Despite potential European perceptions or biases, professionals now recognise that capabilities developed within Novartis Brazil substantially enhance career trajectories. Working in Brazil represents both professional and personal privilege. My family and I have resided here for a year, and I can attest that Brazil offers an exceptional environment professionally and for raising families.

Finally, we invest substantially in future capability development. Artificial intelligence is fundamentally transforming both external and internal operations, necessitating significant systems and human capability investments. Additionally, I personally emphasise inclusive leadership development. As our organisation becomes increasingly diverse – in thinking, gender, and nationality – inclusive leadership will differentiate good teams from those extracting maximum value from diversity. We are prioritising inclusive leadership capabilities to ensure we prepare for tomorrow's requirements, not merely today's.

Looking ahead five years, what constitutes your vision for Novartis Brazil's role within the company and across Latin America's broader healthcare landscape?

What would genuinely fulfil me after five years would be Doubling the patient population benefiting from our treatments. Bringing innovation to Brazil in ways that encompass not only therapeutic innovation but innovative market access approaches, ensuring all Brazilian patients benefit from this innovation and achieve better, longer lives whilst we safeguard healthcare system sustainability. Becoming a reference organisation for healthcare ecosystem partnership, pioneering innovative access models, and building systemic trust – that would constitute a remarkable legacy.

From a talent perspective, I envision recognition as a talent hub and incubator: attracting international professionals seeking Brazilian experience whilst developing Brazilian talent for global impact – influencing not merely Brazil's healthcare system but global healthcare delivery.

How has your career trajectory prepared you to lead Novartis Brazil, and which perspectives from other markets have proved most valuable here?

My economics training provides robust analytical frameworks for understanding systems and models – exceptionally beneficial when analysing diverse healthcare ecosystems and conceptualising partnership or access models. From a technical standpoint, my economics

background serves me well.

From a leadership perspective, what has genuinely shaped me are experiences across countries, cultures, and healthcare systems. Fundamentally, healthcare system challenges remain remarkably similar globally; however, approaches vary considerably, as do requisite capability development strategies. Understanding this through direct experience, including both successes and failures, has progressively enhanced my impact capacity. Ultimately, that drives and motivates me: maximising healthcare system impact and advancing professional and personal development for colleagues.

My educational foundation, international experiences, and diverse functional roles like international positions, regional leadership, operational management, enable comprehensive understanding of corporate strategy and operational execution. This proves invaluable. I consistently advise aspiring leaders to pursue both above-country strategic roles and in-country operational positions; seek experiences across different countries and healthcare ecosystems, as whilst all systems aim to deliver patient health, approaches differ dramatically; and cultivate career breadth through sales, marketing, strategy, and other functions. This breadth ultimately prepares individuals for progressively senior leadership.

What final message would you offer our global readership?

Global leaders must elevate our collective engagement. We have a responsibility in an increasingly volatile world where patients continue suffering illness and substantial unmet medical needs persist. We bear responsibility for delivering innovation sustainably to patients. A fundamental prerequisite for achieving this involves building partnerships founded on trust, adopting long-term perspectives, and maintaining patient centricity.

Is there anything we have not addressed that you consider important to highlight?

When discussing growth drivers and our launch of 18 medicines with 18 more anticipated, this transcends simply introducing individual therapeutics. We are bringing entire technology platforms to market. The future of medicine is evolving, and Novartis pioneers not merely in developing drugs but in constructing platforms targeting multiple diseases.

We introduced the first cell therapy to Brazil which is a critically important innovation. Subsequently, we became the first to bring gene therapy to Brazil, not limited to select populations but accessible nationwide. Last year, we launched radioligand therapy, another platform technology currently indicated for prostate cancer but with potential applicability across numerous cancer types. This represents genuinely significant progress.

Consider just the past twelve months: late last year, we launched radioligand therapy; this January, we introduced a treatment for paroxysmal nocturnal haemoglobinuria (PNH), a rare blood disorder; September brought approval for a treatment addressing C3 glomerulopathy, an exceptionally rare kidney disease; and just last week, we secured approval for a novel breast cancer therapy – particularly timely as we enter Pink October awareness month. Four medicines within twelve months.

This underscores another distinctive Novartis Brazil strength: our capability to launch at scale and deliver innovation sustainably to the Brazilian market is exceptionally well developed. Combined with the talent executing these initiatives, these capabilities represent formidable organisational strengths we have cultivated over recent months and years.

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