## Illustrations

Figures

I.1	Institutional triad of health care	8
6.1	Evolution and specialization of Indian vaccine capabilities	129
7.1	Culture challenges	147
7.2	CRO learning	153
Table	es	
I.1	Global pharmaceutical companies by 2009 global sales	14
I.2	Share of top 10 Indian firms in domestic market	15
2.1	Major pre- and postindependence changes	59
2.2	The link between public health and manufacturing technology	61
3.1	Reluctance of foreign firms in bulk drugs	68
3.2	Public health histories of several leading companies in 2002	70
3.3	Subphases of the first market environment	81
5.1	Development timelines for selected Indian generics	108
5.2	Regulations and tiered markets	110
5.3	Sample Ranbaxy export product launches by 2000–2003	113

## xii Illustrations

5.4	Examples of Ranbaxy's technology and infrastructure milestones	114
6.1	The second market environment's three Ws	132
7.1	Market challenges in synthetic and biopharmaceutical generics	140
7.2	Lateral learning paths	15
7.3	Niche research opportunities	157
8.1	The coevolution of the Japanese triad	178
8.2	Early and late industrial nations and their health sectors	181
9.1	Biotechnology city-regions	187
0.2	Market scales	216