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A. B. OLKHOVSKA, V. V. MALYI  
National University of Pharmacy

## FORMATION OF PARTNERSHIP RELATIONS BETWEEN SUBJECTS OF THE PHARMACEUTICAL MARKET IN PROMOTION OF MEDICINES IN UKRAINE AND FOREIGN COUNTRIES

**Aim.** To substantiate theoretically and practically the essence, content, basic approaches, and tasks to effective formation of partnership relations between the subjects of the pharmaceutical market, which activities are aimed at promoting medicines in Ukraine and foreign countries.

**Materials and Methods.** To implement the objectives the methods of content analysis, logical analysis, grouping, generalization, graphical and marketing research methods were used.

**Results.** The contemporary concepts and tools for establishing and developing partnership relations have been studied, the role and importance of partnership relations in the activities of the subjects of the pharmaceutical market have been determined. The essence, peculiarities and types of partnership relations in the links of the pharmaceutical chain "Manufacturer – Wholesale Company – Pharmacy" have been also described. The most advanced tools and technologies of interaction of the pharmaceutical market players, the main of them are: 1C Rarus (1C sectoral programs for automation of enterprises) and CRM systems as a complex of business processes of the company for interaction with customers (Customer Relationship, Min Peak, Win Peak CRM) have been detailed. The method for analysis of trends and specificity of partnership relations between the subjects of the pharmaceutical market based on such criteria as duration of relationships, deep partnerships, the possibility of duplication, reliable partnerships, dynamic and effective partnership relations has been proposed.

**Conclusions.** The theoretical significance of the research conducted is to specify the idea regarding the importance of partnership relations in the field of pharmaceutical business, which form the basis of the modern strategy of firms, and optimize their resources and opportunities for achieving competitive advantages at the market. The practical importance of the research is that the results obtained can be used for further analysis aimed at creating a more effective and long-term partnership relations between the subjects of the pharmaceutical market in the field of promotion of medicines both in Ukraine and abroad.

**Key words:** partnership relations; medicines; manufacturers; distributors; pharmacies; tools and technologies of interaction; subjects of the pharmaceutical market.

А. Б. ОЛЬХОВСЬКА, В. В. МАЛИЙ

### ФОРМУВАННЯ ПАРТНЕРСЬКИХ ВЗАЄМВІДНОСИН МІЖ СУБ'ЄКТАМИ ФАРМАЦЕВТИЧНОГО РИНКУ У СФЕРІ ПРОСУВАННЯ ЛІКАРСЬКИХ ЗАСОБІВ В УКРАЇНІ ТА ЗАРУБІЖНИХ КРАЇНАХ

**Мета:** теоретичне та практичне обґрунтування сутності, змісту та основних завдань і підходів до ефективного формування партнерських взаємовідносин при побудові бізнес-партнерських зв'язків між суб'єктами фармацевтичного ринку, діяльність яких спрямована на просування лікарських засобів в Україні та у зарубіжних країнах.

**Методи:** контент-аналізу, логічного аналізу, групування, узагальнення, графічний та методи маркетингових досліджень.

**Результати дослідження.** Досліджено сучасні концепції та інструменти налагодження і розвитку партнерських відносин; визначено роль та значення партнерських відносин у діяльності суб'єктів фармацевтичного ринку. Охарактеризовано сутність, особливості та види партнерських відносин у ланках фармацевтичного ланцюга «виробник – оптова фірма – аптека». Деталізовано новітні інструменти і технології взаємодії суб'єктів фармацевтичного ринку, серед яких основними є 1C Рарус (галузеві програми 1C для автоматизації підприємств) та CRM системи як комплекс бізнес-процесів компанії із взаємодії з клієнтами: «Взаємовідносини з клієнтами», «Min Peak, Win Peak CRM». Запропоновано методику аналізу тенденцій та специфіки партнерських відносин між суб'єктами фармацевтичного ринку за такими критеріями, як тривалість відносин, глибина партнерських зв'язків, можливість дублювання, надійність партнерської взаємодії, динаміка партнерських зв'язків та ефективність партнерських відносин.

**Висновки.** Теоретичне значення проведеного дослідження полягає у конкретизації тези відносно значення партнерських відносин у сфері фармацевтичного бізнесу, які становлять основу сучасної стратегії фірм та оптимізують їх ресурси і можливості для досягнення конкурентних переваг на ринку. Практична значущість дослідження полягає в тому, що отримані результати можуть бути застосовані для подальшого аналізу, метою якого є створення ефективного і довгострокового партнерства між суб'єктами фармацевтичного ринку у сфері просуванні лікарських засобів як в Україні, так і за кордоном.

**Ключові слова:** партнерські відносини; лікарські засоби; виробники; дистриб'ютори; аптеки; інструменти та технології взаємодії; суб'єкти фармацевтичного ринку.

А. Б. Ольховская, В. В. Малый

**ФОРМИРОВАНИЕ ПАРТНЕРСКИХ ВЗАИМООТНОШЕНИЙ МЕЖДУ СУБЪЕКТАМИ ФАРМАЦЕВТИЧЕСКОГО РЫНКА В СФЕРЕ ПРОДВИЖЕНИЯ ЛЕКАРСТВЕННЫХ СРЕДСТВ В УКРАИНЕ И ЗАРУБЕЖНЫХ СТРАНАХ**

**Цель:** теоретическое и практическое обоснование сущности, содержания, основных задач и подходов к эффективному формированию партнерских взаимоотношений при построении бизнес-партнерских связей между субъектами фармацевтического рынка, деятельность которых направлена на продвижение лекарственных средств в Украине и зарубежных странах.

**Методы:** контент-анализа, логического анализа, группировки, обобщения, графический и методы маркетинговых исследований.

**Результаты исследования.** Исследованы современные концепции и инструменты налаживания и развития партнерских отношений; определены роль и значение партнерских отношений в деятельности субъектов фармацевтического рынка. Охарактеризованы сущность, особенности и виды партнерских отношений в звеньях фармацевтической цепи «производитель – оптовая фирма – аптека». Детализированы новые инструменты и технологии взаимодействия субъектов фармацевтического рынка, среди которых в качестве основных выступают 1С Парус (отраслевые программы 1С для автоматизации предприятий) и CRM системы как комплекс бизнес-процессов компании по взаимодействию с клиентами: «Взаимоотношения с клиентами», «Min Peak, Win Peak CRM». Предложена методика анализа тенденций и специфики партнерских отношений между субъектами фармацевтического рынка по таким критериям, как продолжительность отношений, глубина партнерских связей, возможность дублирования, надежность партнерского взаимодействия, динамика партнерских связей и эффективность партнерских отношений.

**Выводы.** Теоретическое значение проведенного исследования заключается в конкретизации положения относительно значения партнерских отношений в сфере фармацевтического бизнеса, которые составляют основу современной стратегии фирм и оптимизируют их ресурсы и возможности для достижения конкурентных преимуществ на рынке. Практическая значимость исследования заключается в том, что полученные результаты могут быть использованы для дальнейшего анализа, целью которого является создание эффективного и долгосрочного партнерства между субъектами фармацевтического рынка в сфере продвижении лекарственных средств как в Украине, так и за рубежом.

**Ключевые слова:** партнерские отношения; лекарственные средства; производители; дистрибьюторы; аптеки; инструменты и технологии взаимодействия; субъекты фармацевтического рынка.

**Statement of the problem.** While searching partners in any business any enterprise inevitably faces the problem of establishing partnerships based on the mutual transparency and openness of partners in search of organizational partners, timely disclosure of appropriate information regarding the structure of management, production and sales of products, enterprise resources, etc. Trusting mutual relations between business partners involve permanent and thorough analysis of the internal and external environment of the partnership, which can result in trusting business relations. Effective partnership and partnership relations of business subjects are the driving force of economic relations. Their effective implementation allows not only to control obtaining the necessary resources, but also to plan their development and market stability. Under these conditions, the main benchmarks of the market activity of business entities within their spheres of functioning are harmonization of economic ties, the search for a sustainable competitive advantage, introduction of new developments in goods and services, as well as effective channels of the commodity turnover and their interaction.

The effective functioning of the pharmaceutical sector in accordance with the innovation vector of development is also largely connected with the number and quality of partnerships and relationships between them. Today, in the context of globalization of the pharmaceutical market and the increased demand for its products it becomes important to establish partnership relations since an effective system of mutual relations in the long run is a precondition of the market stability of the enterprise and its competitive advantages. However, unambiguous recognition of the importance of issues by scientists and pharmacists in forming partnerships between subjects of the pharmaceutical market does not provide a complete answer to the most effective ways, mechanisms and technologies for development of mutually beneficial cooperation and the spread of partnership practices. The foregoing determines the relevance of the topic of research.

**Analysis of recent research and publications.** Such authors as O. Ye. Kuzmin, V. O. Mandybura, Ye. G. Matviyishin and others have strongly influenced development of the general theory of confidence between partners and, directly, confidence of final consumption subjects as

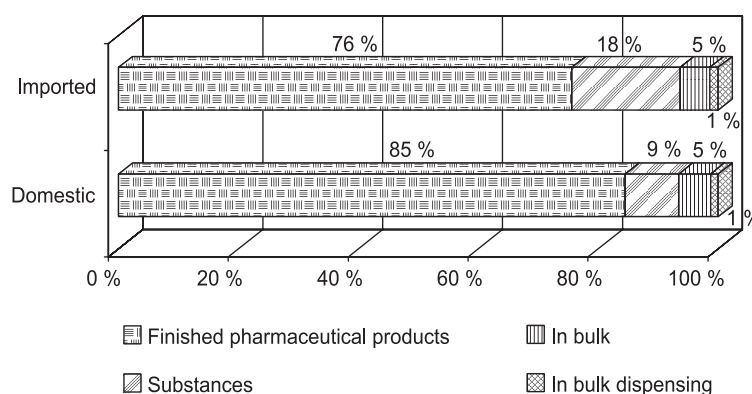


Fig. 1. The ratio of groups of medicines at the pharmaceutical market of Ukraine in the segments of domestic and imported pharmaceutical products as of December 28, 2018 (detailed by the authors on the basis of the materials [10])

a component of social responsibility of business [1-3]. Yu. M. Knyazyk, M. I. Us have considered the problem of evaluation and development of relations between business partners, as well as their interaction and modern directions of formation [4, 5]. I. Podgurska has dealt with the issues of the international partnerships in the modern world economy [6]. The works by O. M. Piven are devoted to the problem of the awareness level of specialists of pharmaceutical enterprises concerning the basic principles of marketing relationships [7]. A. A. Kotvitska [8] has studied the system of state regulation of pharmaceutical legal relations in the sphere of drug circulation, including the normative legal regulation of import-substituting production of medicines in Ukraine.

**Identification of aspects of the problem unsolved previously.** With a large number of works devoted to business partnership relations and the phenomenon of confidence, etc., we can note the growing interest of scientists, researchers and professionals of the pharmaceutical sector in the problem of effective mutually beneficial cooperation between the subjects of the pharmaceutical market.

**Objective statement of the article.** Summarizing the above the aim the study is theoretical and practical grounding of the essence, content, main approaches and tasks to effectively form partnerships in business partnership ties between the subjects of the pharmaceutical market, whose activities are aimed at promoting medicines in Ukraine and foreign countries.

**Materials and Methods.** To implement the objectives the methods of content analysis,

logical analysis, grouping, generalization, graphical and marketing research methods were used.

**Presentation of the main material of the research.** Partnership relations are a type of economic relations based on joint actions and efforts of the parties united by common interest (beneficial to both parties), aimed at achieving specific goals that are well understood by the participants in such relationships. Recently, the pharmaceutical market has undergone significant structural changes, which have affected the quantitative and qualitative composition of the interacting parties, mechanisms, technologies and the nature of their interaction with the effectiveness as a guarantee of the optimal use of the resources of the pharmaceutical sector of healthcare, which is in line with the National Strategy for Provision of the Population with Medicines for the Period of 2018-2025 [9].

According to the data of the Department of Pharmaceutical Activities at the Ministry of Health of Ukraine, 13 046 names of medicines were registered, including finished pharmaceutical products – 10 290; substances – 1961; in bulk – 613; in bulk dispensing – 175. By distribution for domestic and imported products their structure is detailed in Fig. 1.

Further analysis of the structure of the export and import potential of the pharmaceutical market showed a significant prevalence of imports over exports of pharmaceutical products, which, in our opinion, greatly increases the valence of partnership relations between the subjects of the pharmaceutical market since their effective interaction is decisive for the

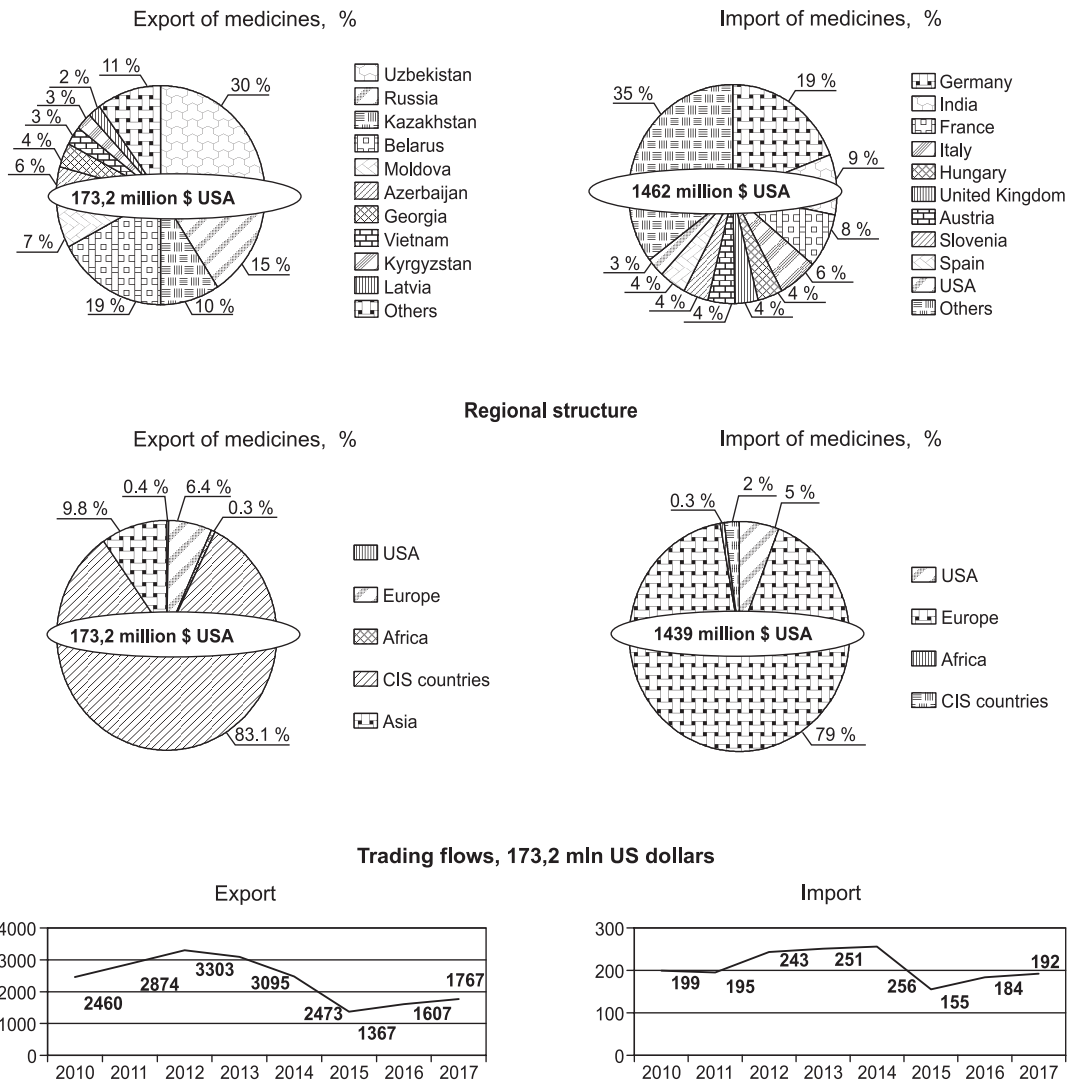


Fig. 2. The analysis of the foreign economic interaction of the subjects of the pharmaceutical market (detailed by the authors on the basis of the materials [11])

optimal provision of the population with such products. Fig. 2 has specified such pharmaceutical product as “Medicines” (commodity position is 3004 of group 30 “Pharmaceutical products” according to the Ukrainian classification of goods of FT).

The pharmaceutical distributor is an intermediate link in the chain of medicines with the fundamental task to promote the pharmaceutical product provided that the contractual partnerships are built on the most advantageous terms for all parties (manufacturer – distributor – retailer) of the commercial agreement.

We should note that each party of this interaction contains relationships between their structural business units and relations within them as the macro-level relationships; their

neglect may undermine all market benefits (both quantitative and qualitative) for partners within the chain. Today’s distributive companies are actively developing partnerships with all players of the pharmaceutical market, thereby trying to increase their influence on its main trends.

TOP-10 distributors of the pharmaceutical sector of Ukraine by the market share in 2018 were represented by the following enterprises: BaDM (Dnipro), Optima-Farm (Kyiv), Venta (Dnipro), FRAM KO (Kyiv), Farm Planeta (Kyiv), Fito-Lek (Kharkiv), Ametrin FK (Kyiv), MedCenter M.T.K. (Kyiv), Farmako (Kyiv), Medfarkom (Odesa) [12].

Wholesale intermediaries are the key intermediaries between pharmaceutical manufacturers and the pharmaceutical segment,



providing timely and regular deliveries of pharmaceutical products while guaranteeing compliance with regulatory requirements for transportation, storage and drug inventory.

However, it should be noted that the process of consolidation is expanding in the field of distribution at the Ukrainian market as the largest three companies account for about 75-80 % of the total supply. This, in turn, reduces the risk of diversification of the structure of buyers and increases the risks of dependence of pharmaceutical manufactures upon individual contractors.

Retail trade of medicines occupies 86 % of the market [13]. Regarding the results of 2018, the leader in pharmacy networks by the number of outlets is *Apteka-Magnolia* (Zaporozhye, brands: *Apteka Nizkikh Tsen, Blahodiya, Kopyyka*), which already owns more than 550 outlets. The TOP-5 largest networks also include *Sirus-95* (Kyiv, the brand: *Bazhayemo Zdorovya*), with about 480 outlets; *Gamma-55* (Kharkiv, the brand – “911”) has about 310 outlets; *Med-Service Group* (Dnipro, the brand: *Med-Service*) with the network consisting of more than 300 outlets, and *Pharmastor* (Kyiv, the brand: *Apteka Dobroho Dnya*) with more than 230 outlets [15].

The analysis of literature enables to distinguish between two main forms of partnership of the pharmaceutical market subjects in the sphere of promoting medicines to the market, namely **organization of subsidiary offices** in the territory of Ukraine as a form of interaction with a definite business unit of the company, and **outsourcing**, which can be implemented by the following types: *production outsourcing* that involves assigning part of production functions to a third-party organization, including self-production contracting aimed at development of generic pharmaceutical business; *outsourcing of business processes*, including validation of the technological process and registration of medicines in different markets; *innovative outsourcing*, the implementation enables pharmaceutical enterprises to manage the rate of promotion of new medicines to the market, including development and implementation of software and project management, and *outsourcing of functions*, which provides for the delegation of part of business processes of the market player through interaction with

specialized warehouse agents (consignment warehouses); with the Ukrainian producers who import medicines in the form of bulk or the raw material, followed by dispensing or production on the territory of Ukraine with organizations specializing in outsourcing with a distributive office [15-17].

The above-mentioned factors have led to radical changes in the work of manufacturers, distributors and retail sector; their motto is to create equal partnership of the parties in interrelations of enterprises.

*At the same time, the following principles have become basic in such relationships, namely consolidation of general and individual goals; confidence of partners for the purpose of long-term prospect of fruitful market partnership, voluntary accession to the business community, transparency and maximum openness of the parties, mutually beneficial cooperation with the compulsory recouplement of partnership relations.*

The conditions for implementing the above principles of partnership relations are the general interests and goals based on the available initial level of cooperation and confidence of the parties, while stipulating the necessary mutual partnership, the general understanding of the result of cooperation and establishment of effective and open contacts, including the dialog of the parties as the main way to settle disputes arising in the process of developing interrelations of enterprises.

The most important task of such relationships is to monitor and develop a strategic partnership with consumers, suppliers and distributors. The relationship policy, in this case, transforms the management processes from the microeconomic to macroeconomic level when partnership acquires a unique special role, and aims to become a strategic partnership with suppliers and technology partners, as well as long-term relationships with consumers.

Today, professionals in practical pharmacy master the latest tools and technologies for such interaction, the main of them are: *1C Rarus* (branch of the 1C program for automation of enterprises) and *CRM systems* as a complex of business processes of the company to interact with customers (partners and contractors) focused on the increased sales, effective market cooperation, improved customer servicing

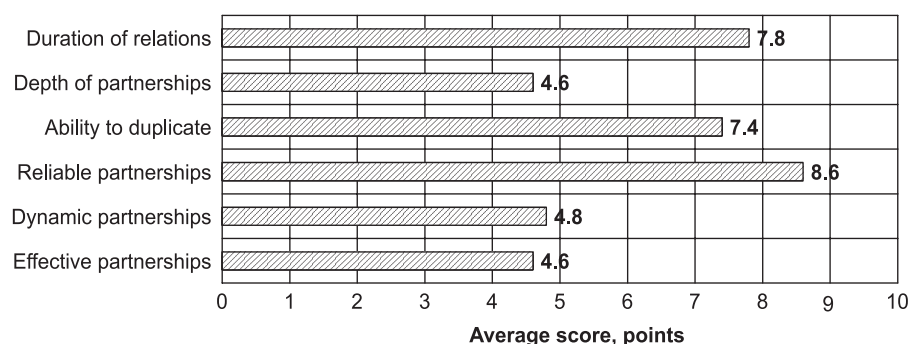


Fig. 3 The average rating criteria of partnerships of subjects of the pharmaceutical market (the author's research)

and long-term and trusting relationships with partners – *Mutual Relations with Customers, Min Peak, Win Peak CRM* (a system designed to optimize the information support of relationships with customers). The above software products of the CRM systems can operate in the following modes: the *operating* mode, which enables to automate the storage of customer information and access to it; the *analytical* one, which enables to automate the analysis of data about customers, and the *collaborative* one, which essence is to automate company contacts with customers [18].

It should be emphasized that the subjects of the Ukrainian pharmaceutical market also have the opportunity to use such software products as **Kanban** and **Keiretsu** which have long been implemented in Japanese and European companies as innovative partnership models, but have not yet been used by the Ukrainian entrepreneurs. The *Kanban* system enables to perform export and import operations in order to promote medicines on a transparent strategic basis, ensuring reliable, deep and dynamic partnerships through the assortment formation without the risk of overstocking or shortage. The *Keiretsu* system can function both horizontally and vertically, its essence is to create a network of enterprises with its further operation, which share capital, scientific and research developments, customers, sellers and distributors.

Taking into account the aforementioned we have analyzed the trends and peculiarities of the partnership relations between the subjects of the pharmaceutical market according to the following criteria:

- **duration of relationship** as a factor of a long-term partnership, the implementation

of it enables to plan the costs and timing of projects, timely and appropriate fulfillment of obligations, to avoid the risks of storage of both products and the raw material, as well as in the process of sales and promotion of medicines;

- **the depth of partnerships** as a factor of the level of interaction between partners in different fields. Also, within the framework of this criterion, it is envisaged to assess the presence or absence of a process of joint planning and control of joint activities, creating and functioning of jointly established structures necessary for the best partnership;

- **the possibility of duplication** (of partner, communication channel, contact), which provides for the ability of an enterprise to replace one connection with another in the shortest possible time in case if a partner can not fulfill its partnership obligations for some reason. This opportunity is implemented through available contacts and channels of the partnership communication;

- **reliable partnership**, which is the result of trusting and synchronized cooperation; the quantitative and qualitative assessment of a partner expressed in such parameters as financial indicators, goodwill, ability to accurately and timely fulfill the obligations assumed;

- **the dynamic partnerships** as a factor of expanding the sphere of partnership, development and implementation of new ways of establishing and developing partnerships, penetration to new markets through partners;

- **the effective partnership** is expressed as the ratio of the value of the contract to the total income from activities in this type of interaction or through the comparison of terms of transactions; directly the efficiency of consumers

Table

## ANALYSIS OF TRENDS AND PECULIARITIES OF PARTNERSHIPS BETWEEN SUBJECTS OF THE PHARMACEUTICAL MARKET

Partnership criteria	Experts	Representatives of pharmaceutical manufacturers	Specialists of the domestic wholesale sector	Representatives of foreign distributors	Representatives of the retail sector
<b>Duration of relations</b>					
Timely and appropriate fulfillment of obligations	9	9	7	7	9
Avoiding risks	7	7	6	6	8
<i>Average rate of the criterion</i>	8	8	6.5	6.5	8.5
<b>Depth of partnerships</b>					
Joint planning process	4	3	4	4	2
Control of the joint activity	3	2	3	3	2
Creating and functioning of jointly formed structures	6	3	5	5	2
<i>Average rate of the criterion</i>	6.5	4	6	6	2
<b>Ability to duplicate</b>					
Availability of contacts	8	8	9	9	5
Availability of affiliate channels	8	8	9	9	4
<i>Average rate of the criterion</i>	8	8	9	9	4.5
<b>Reliable partnerships</b>					
Assessment of trust in partnership	9	8	8	8	8
Assessment of goodwill	9	9	9	9	9
Assessment of the ability to fulfill the obligations assumed in a timely manner	9	9	7	7	9
<i>Average rate of the criterion</i>	9	8.6	8	8	8.6
<b>Dynamic partnerships</b>					
Development and implementation of new ways of establishing and developing partnerships	7	6	4	4	3
Penetration through partners to new markets	6	5	5	5	2
<i>Average rate of the criterion</i>	6.5	5.5	4.5	4.5	2.5
<b>Effective partnerships</b>					
The possibility to reorient activities according to the market conditions	4	4	4	4	0
The ability of partners to strengthen their market competitive advantages	6	7	6	6	6
<i>Average rate of the criterion</i>	5	5.5	5	5	3

can be estimated by the share in the total purchases. However, taking into account that these indicators constitute a commercial secret of any business structure, we propose the following conditions as criteria for the effective partnership, namely the possibility to reorient activities in accordance with the market conditions; the ability of partners to achieve, maintain and enhance their market competitive advantages in conducting business on an independent basis and on the basis of partnerships.

The research was performed at the premises of domestic pharmaceutical enterprises (manufacturers, wholesalers, pharmacies), as well as involving specialists from foreign pharmaceutical companies.

The total number of experts was 160 people with the following parity distribution:

- representatives of manufacturers of pharmaceutical products at the level of heads of structural units – 40 people;
- representatives of the wholesale chain – 80, further subdivided into:
  - specialists of domestic firms – 40 people;
  - representatives of foreign distributors – 40 people;
  - retail agents – 40 people, the expert level – pharmacy managers and/or authorized persons who have a functional or delegating responsibility for communicating with the wholesale network and/or structural subdivisions of the manufacturing plants.

The components of the criteria for the effective partnership were assessed according to ten-point scale with 10 points as the highest score of the criterion.

The results of the study are presented in Tab. and Fig. 3.

The analysis of partnership relation criteria between the subjects of the pharmaceutical market has shown all the trends of the level of partnerships. Thus, such criteria as reliability, durability and duplication (8.6; 7.8; 7.4 points) rank first in the implementation of partnerships. Against this background, the value of the average score of such criteria as dynamic partnerships, their effectiveness and depth (4.8, 4.6, 4.6 points, respectively) are of some concern since they are indicators, first of all, of the radical change of approaches to development of mutual partnerships between the pharmaceutical market players in the field of drug promotion, and secondly, serve as a basis

for development of new business models at the market, and, thirdly, of market stability and the ability of partners to strengthen their market competitive advantages at the expense of mutual understanding of the social orientation of the general mission of the pharmaceutical sector and the importance of partnerships for their implementation.

We should note that the results obtained are reduced by the position of the retail sector, which representatives assessed the components of these criteria as such, and this fact shows the *current* inefficiency of their interaction with other parties in the partnerships and requires further correction.

**Conclusions and prospects for further research.** The theoretical and practical substantiation of the essence, content, basic approaches and tasks for effective partnerships in business relations between the subjects of the pharmaceutical market aimed at promoting medicines in Ukraine and foreign countries has been conducted. It has been found that partnerships are a kind of economic relations based on joint actions and efforts of the parties, united by common interest (beneficial to both parties), aimed at achieving specific goals well understood by the participants of such relations. *The theoretical significance* of their analysis is to specify the idea regarding the importance of partnership relations in the field of pharmaceutical business, which form the basis of the modern strategy of firms, and optimize their resources and opportunities for achieving competitive advantages at the market. The practical importance of the research is that the results obtained can be used for further analysis aimed at creating a more effective and long-term partnership relations between the subjects of the pharmaceutical market in the field of promotion of medicines both in Ukraine and abroad. Taking into account the fact that some indicators of partnership criteria for the retail sector are rather problematic a complex analysis of the problems associated with deep partnership relations by such components as the process of joint planning, control of joint activities, creation and functioning of the jointly formed structures has been considered as a prospect of further research.

**Conflict of Interests:** authors have no conflict of interests to declare.



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*Information about authors:*

**Olkhovska A. B.**, Candidate of Pharmacy (PhD), associate professor of the Pharmaceutical Marketing and Management Department, National University of Pharmacy (<https://orcid.org/0000-0002-0237-5741>).  
E-mail: [angelika.olkhovskaya@gmail.com](mailto:angelika.olkhovskaya@gmail.com)

**Malyi V. V.**, Doctor of Pharmacy (Dr. habil.), professor, head of the Department of Pharmaceutical Marketing and Management, National University of Pharmacy (<https://orcid.org/0000-0002-6028-1890>). E-mail: [malyi.vladimir@gmail.com](mailto:malyi.vladimir@gmail.com)

*Відомості про авторів:*

**Ольховська А. Б.**, кандидат фармацевтичних наук, доцент кафедри фармацевтичного маркетингу та менеджменту, Національний фармацевтичний університет (<https://orcid.org/0000-0002-0237-5741>).  
E-mail: [angelika.olkhovskaya@gmail.com](mailto:angelika.olkhovskaya@gmail.com)

**Малий В. В.**, доктор фармацевтичних наук, професор, завідувач кафедри фармацевтичного маркетингу та менеджменту, Національний фармацевтичний університет (<https://orcid.org/0000-0002-6028-1890>). E-mail: [malyi.vladimir@gmail.com](mailto:malyi.vladimir@gmail.com)

*Сведения об авторах:*

**Ольховская А. Б.**, кандидат фармацевтических наук, доцент кафедры фармацевтического маркетинга и менеджмента, Национальный фармацевтический университет (<https://orcid.org/0000-0002-0237-5741>).  
E-mail: [angelika.olkhovskaya@gmail.com](mailto:angelika.olkhovskaya@gmail.com)

**Малий В. В.**, доктор фармацевтических наук, профессор, заведующий кафедрой фармацевтического маркетинга и менеджмента, Национальный фармацевтический университет (<https://orcid.org/0000-0002-6028-1890>).  
E-mail: [malyi.vladimir@gmail.com](mailto:malyi.vladimir@gmail.com)

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