

White Paper

The Future Is Built Here: Pharmaceutical HUBs as Engines of Innovation

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Introduction

Spain and Portugal have established themselves as a strategic hub for the pharmaceutical and health technology industry, attracting a growing number of companies setting up their HUBs or Global Business Services (GBS) centers in the region.

Pharmaceutical companies such as AstraZeneca, Alexion, Merck, Novo Nordisk, Boehringer Ingelheim, Grifols, Bayer, Sanofi, Organon, and Novartis, alongside MedTech leaders including Medtronic, Siemens Healthineers, Boston Scientific, and Philips Healthcare, have chosen Spain or Portugal to centralize key functions. These HUBs span strategic areas such as Business Development & Licensing (BDL) to operational business support functions — including Launch Excellence, Customer Engagement, Data & Analytics, Digital & AI, Market Access, Real World Evidence (RWE), Digital Health, and Innovation — as well as support functions such as finance, IT, procurement, and quality. This ecosystem is further strengthened by the innovative dynamism of cities like Barcelona, Madrid, and Lisbon which serve as talent incubators and accelerators for digital health start-ups such as Idoven and Tucuvi, consolidating an environment conducive to the sector's transformation.

Iberia has solidified its position as an attractive investment environment, particularly in strategic sectors such as the pharmaceutical industry. Spain ranks among the European nations with the greatest potential in drug manufacturing. Its pharmaceutical industrial fabric is robust, with a strong presence of both domestic and international companies that regard Spain as a key component in their production chains. Currently, there are 103 human-use drug manufacturing plants, 11 of which specialize in biological medicines. Additionally, there are 46 active pharmaceutical ingredient production plants and 24 dedicated to veterinary medicines, bringing the total to 173 facilities

belonging to 122 distinct business groups.¹ Catalonia accounts for 45% of these plants, making it a benchmark region in drug manufacturing. Moreover, the sector stands out for its high degree of internationalization: over 75% of domestic production is destined for export, with pharmaceuticals being the country's fourth most exported product, according to data from Spain's National Statistics Institute (INE) and the Secretary of State for Foreign Trade.

Spain has also consolidated its position as one of the world's leading countries in clinical trial development. In 2024, 43% of EU-authorized clinical trials were conducted on Spanish territory, with 350 studies supervised by the AEMPS, surpassing powerhouses such as Germany and France.² These trials are not only essential for developing new treatments but also represent a vehicle for attracting international investment, improving healthcare quality, and enabling healthcare professionals to remain at the scientific forefront. In fact, 60% of pharmaceutical companies' R&D investment in Spain is already allocated to clinical research.³

On the other hand, Portugal is increasingly reinforcing this Iberian value proposition. The country's health and life sciences ecosystem generated approximately €29.7 billion in annual turnover in 2024, encompassing over 124,000 companies and employing more than 268,000 people.⁴ Health sector exports surpassed €5.6 billion in 2025 — a 37.9% increase year-on-year — with pharmaceutical preparations accounting for 85.2% of total health exports, delivered to 184 markets worldwide, according to data from AICEP. On the manufacturing

side, Portugal is home to globally recognized players such as Hovione, a leading CDMO currently investing in a new manufacturing campus in Seixal set to open in mid-2027,⁵ and BIAL, which invested €30 million in expanding its Trofa production campus to more than double its installed capacity to 23 million packages per year.⁶

Portugal's attractiveness as a strategic HUB location has also been validated by major multinational investments: AstraZeneca has committed €600 million over a 10-year period (2024–2033) to develop a global services hub in Lisbon, providing high-value functions including project management, finance, IT, procurement and human resources, and employing over 750 professionals.⁷

Portugal is also demonstrating growing momentum in clinical research. In 2025, 209 clinical trials were submitted to INFARMED — up from 204 in 2024 and 176 in 2023 — reflecting sustained year-on-year growth and positioning the country as an increasingly competitive destination for clinical research in the European context.⁸

In this context, Iberia meets the necessary conditions to consolidate itself as a pharmaceutical specialization hub in Europe: qualified talent, industrial expertise, a favorable economic environment, and competitive costs. This has driven the establishment of pharmaceutical HUBs in both countries, conceived as global or regional centers of excellence that foster cooperation, innovation, and the development of strategic activities such as logistics, data analytics, shared services, and R&D.

The purpose of this white paper is to define a framework that serves as a guide for companies and healthcare sector leaders interested in designing and operating a global services center in the Iberian Peninsula. Through the analysis of real-world cases and testimonials from professionals who have led the launch of these HUBs, the aim is to illustrate the strategic value these structures provide, as well as to offer practical tools for building a robust business case that facilitates internal support and accelerates decision-making.



Framework for Establishing a HUB in Iberia

The creation of a HUB or global services center in the healthcare sector requires strategic and operational reflection to align corporate objectives with local capabilities. Drawing on the testimonials gathered, we have defined a structured framework that enables visualization of the key elements underpinning the design, implementation, and consolidation of a HUB in Spain or Portugal.

STRATEGIC OBJECTIVE OF THE HUB

At the apex of the framework sits the HUB's strategic purpose, which addresses the motivations driving its creation: from the need to accelerate digital transformation to improving commercial and operational excellence, its impact on both costs and business expansion, and access to specialized talent.

This objective must be aligned with the company's starting point, considering factors such as the degree of centralization and standardization of its processes, the homogeneity of profiles and working methods, and the level of implementation of common technology platforms. This initial assessment enables the definition of the most suitable type of HUB and its scalability potential.

OPERATIONAL PILLARS OF THE HUB

Supporting the roof are five interconnected pillars that constitute the HUB's key dimensions:

- **Scope and service model:** Defines the territories included within the HUB's perimeter (e.g., segmentation of country clusters into tiers based on relevance and business impact) and the activities to be centralized. A distinction is made between high-value-added activities requiring local knowledge and more technical or recurring tasks that can be standardized.
- **Organizational structure and governance:** Encompasses the HUB's physical location, organizational structure, sizing, and governance

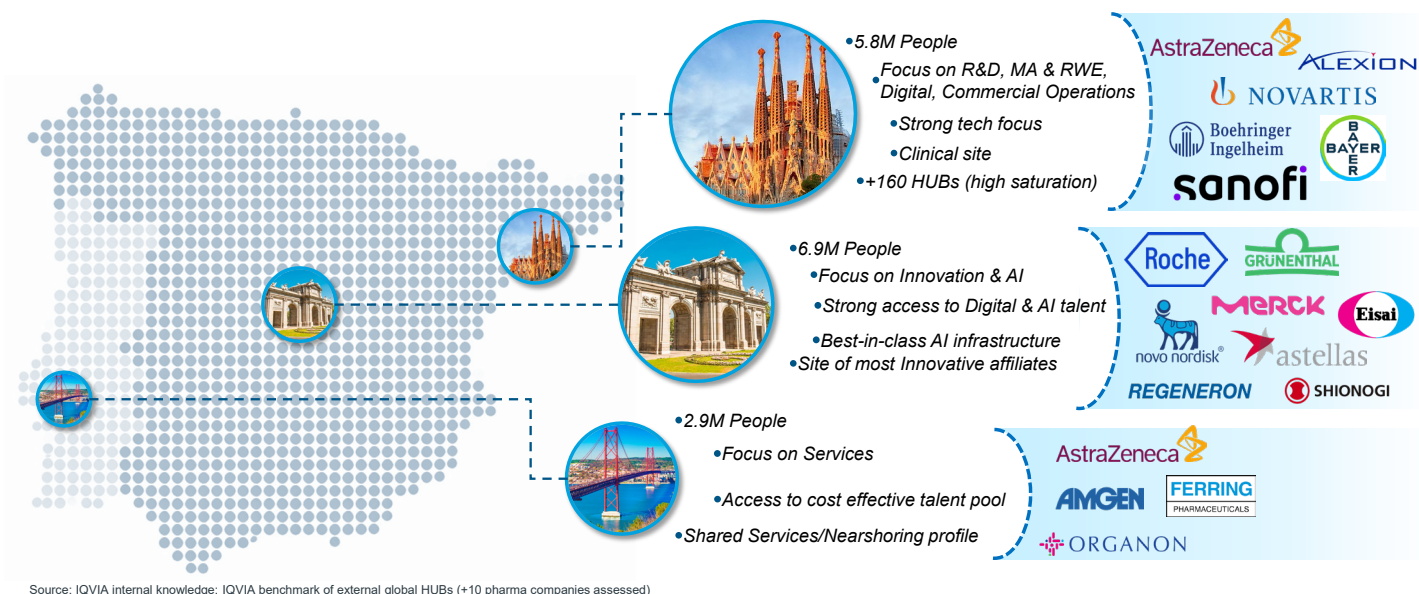
mechanisms between the HUB and the country clusters. The optimal location will depend on the type of activities to be performed and the countries included in scope.

- **Employee value proposition and sourcing model:** Considers the professional profiles required, key capabilities, and the hiring model (internal team, outsourcing, talent relocation). This pillar is essential for ensuring the HUB's sustainability and attractiveness.
- **Funding model:** Establishes how the HUB will be financed: through central, regional, or local funds. This aspect directly influences the center's autonomy and its investment capacity.
- **Implementation model:** Defines the roadmap for the HUB's launch: which countries are onboarded first, the deployment pace, and the key milestones in the process.

Additionally, at a cross-cutting level, four enabling elements allow the pillars to hold together and function in an integrated manner:

- **Organization and culture:** Alignment of values, leadership, and ways of working.
- **Processes:** Clear definition, standardization, and continuous improvement.
- **Technology and digitalization:** Common platforms, interoperability, and automation.
- **Value creation and business case:** Identification of tangible and intangible benefits, and construction of a solid business case that facilitates internal buy-in and organizational commitment.

Figure 1. Benchmark of selected European locations for pharmaceutical HUBs



Strategic Objective of the HUB

The creation of pharmaceutical HUBs emerges as a strategic response to the operational and structural challenges faced by companies in the sector. These centers enable the centralization of key functions, resource optimization, process standardization, acceleration of technology adoption, and improvement of organizational efficiency in an increasingly competitive and dynamic environment.

STRATEGIC MOTIVATIONS FOR ESTABLISHING A HUB:

- **Operational cost optimization:** In a context of margin pressure and growing complexity in launching innovative products, HUBs generate savings through economies of scale, process standardization, greater adoption of digital tools, and more efficient resource allocation.
- **Supplier management simplification:** Consolidating the supply chain within a HUB facilitates the negotiation of better contractual terms, reduces operational fragmentation, and improves quality control.
- **Operational harmonization:** Centralizing functions eliminates duplications across regions or units, enabling better utilization of internal talent and greater consistency in service delivery.
- **Service level improvement:** By concentrating knowledge, best practices, and innovation, HUBs elevate the quality of internal services, acting as centers of excellence that drive professionalization and standardization.
- **Adaptation to corporate transformation processes:** Internal reorganizations, mergers, or acquisitions often require a new organizational configuration. HUBs offer an agile and scalable solution for reconfiguring support teams such as IT, finance, analytics, or supply chain.
- **Mitigation of the financial impact from patent losses:** Facing the expiration of key patents, HUBs enable the adjustment of structures and resources while maintaining operational efficiency and financial sustainability.

- **Acceleration of technology adoption:** The creation of global centers of excellence facilitates the implementation of emerging technologies such as artificial intelligence, avoiding fragmented efforts and promoting a unified, scalable vision aligned with corporate objectives.

Together, these motivations reinforce the strategic value of HUBs as engines of transformation, efficiency, and innovation. Beyond cost optimization, they enable organizations to adapt swiftly to environmental changes, generate added value, and consolidate a more robust operational structure aligned with their global objectives.

Operational Pillars of the HUB

Once the HUB's strategic purpose has been defined, it must be translated into its operational structure. The framework rests on five fundamental pillars that configure the distinct layers to be considered when designing and launching a global services center in the healthcare sector. These pillars are interconnected and enable the translation of strategic vision into a functional, scalable architecture aligned with the organization's needs.

SCOPE AND SERVICE MODEL

The first aspect is defining the geographic scope — which countries will be included in the HUB. Classification can be made by strategic levels:

- **Tier 1:** Priority countries by business volume, operational complexity, or strategic relevance. They are typically the first to be onboarded. These countries are critical to the success of HUB model implementation, both from a cost-efficiency and model-definition standpoint. Accordingly, the rollout must be guaranteed by designing models adapted and tailored to the needs and idiosyncrasies of each country. Local knowledge and market experience must be ensured during implementation through the allocation of dedicated resources, both within the HUB and across different geographies. The learnings and

the model refined for these countries will define the reference model for Tier 2 and Tier 3 countries.

- **Tier 2:** Countries with relevant but less complex operations; they are onboarded in intermediate phases. The model in these countries is applied in an adapted manner but with fewer degrees of freedom compared to higher-relevance countries. These geographies may also play a significant role in defining a pilot or testing the HUB model in lower-impact countries, implementing the model in alternation with Tier 1 countries.
- **Tier 3:** Countries with lower volume or complexity; they are integrated in later phases with more standardized models. As a general rule, these countries are onboarded through blueprints or predefined models developed during Tier 1 and Tier 2 implementation.

This classification enables resource prioritization, service model adaptation, and the definition of a progressive implementation roadmap.

LOCATION SELECTION

The choice of location for a pharmaceutical HUB is a strategic decision that can also determine its success and sustainability. It is not solely about finding a place with competitive costs and a degree of stability, but about identifying an environment that also combines access to talent, quality of life, and global connectivity. The key factors to consider include:

- **Cost-benefit assessment:** One of the first elements to analyze is the relationship between location-associated costs and the operational benefits it can deliver. Finding a location with lower costs and stability is the baseline of the exercise, but it is not sufficient. The exercise cannot be based solely on centralizing cheaper resources — a short-sighted approach. It must achieve economies of scale, or the viability or economic interest will be compromised in the medium term.

- **Talent access and attraction:** The availability of qualified talent and the ability to attract international profiles are determining factors. Companies must evaluate both the local labor market — considering the potential and collaboration with local universities and training centers. The presence of prestigious academic institutions provides a steady flow of qualified professionals, facilitating continuous talent generation to nurture the team. Additionally, to attract and retain talent, it is essential that the location offers a high quality of life: a safe and healthy environment, English proficiency levels, favorable climate, affordable housing, tax benefits, efficient public services, modern infrastructure, and cultural and educational offerings, among others. These factors are especially relevant for international professionals who value work-life balance and will enable the HUB to be endowed with talent diversity — in terms of nationality, education, and experience — enriching the organizational culture, fostering innovation, and enabling the evolution of the HUB's service and function portfolio.

- **Operational factors:** Other elements, although less visible, can have a significant impact on location selection. Time zone differences with other regions can affect coordination with global teams, so it is advisable to consider locations that minimize this gap if continuous collaboration is required.

Service Types must also be defined:

- **High-value-added services:** Activities requiring deep local market knowledge, stakeholder interaction, or strategic capabilities (e.g., Market Access, RWE, Digital Health, Customer Engagement).
- **Transactional or recurring services:** Operational activities that can be standardized and centralized (e.g., Finance, IT, Procurement, Reporting, Quality).

The service delivery model from the HUB must also be defined, distinguishing between a **centralized model** where all services are managed from the HUB with standardized processes, a **federated model** where the HUB maintains a degree of decentralization, or a **hybrid model** that combines centralized and local services depending on the nature of each function.



Organizational Structure and Governance

The HUB's organizational structure is a critical factor for its success. Based on the defined objectives and value proposition, the services the HUB will offer and the operating model to be adopted must be determined. A well-designed structure should:

- Be aligned with the company's strategic objectives.
- Facilitate cross-functional collaboration and agile decision-making.
- Promote operational efficiency, fostering innovation and seeking scalability.
- Understand and adapt to the organization's local context.

Choosing the right model depends on the HUB's scope, the type of services offered, the number of countries involved, and the degree of organizational maturity. The three most common models are:

- **Functional structure:** Teams are organized by function or area of specialization (e.g., procurement, finance, market access). Each function has its own team led by a functional head. This model provides clarity in the chain of command, greater operational control, and lower organizational complexity. However, it implies less flexibility to adapt to regional or client needs, a risk of working in silos, and limited cross-functional collaboration. It is suitable for HUBs in early stages or with a limited scope.
- **Matrix structure:** This model combines functional specialization with client, regional, or project orientation. Employees may have dual reporting lines: one functional and one regional or project-based. The matrix model fosters cross-area collaboration, enables resource and knowledge sharing, and facilitates HUB scalability, standardization, and innovation. However, it can generate decision-making complexity, a risk of conflicts, and requires solid governance.

- **Process- or team-based structure:** This model organizes teams around processes aimed at fulfilling specific objectives (e.g., product launch, process automation). It allows high adaptability and execution speed, features a strong results orientation, and promotes innovation and autonomy. However, it requires a strong collaborative culture and robust governance.

Ultimately, there is no one-size-fits-all model for HUBs. The choice of organizational structure will depend on the center's degree of maturity, the type of services to be offered, and the desired level of autonomy. Although the matrix structure is one of the most widespread in the sector, the shift toward a more integrated or agile model can be gradual, progressively adapting to the specific needs of each organization and the operational context in which it operates.

Employee Value Proposition and Sourcing Model

The creation of a pharmaceutical HUB is a strategic process that requires planning, coherence, and long-term vision. From defining the Employee Value Proposition (EVP) to talent acquisition and management, every decision must be aligned with the HUB's objectives and the company's organizational culture.

EMPLOYEE VALUE PROPOSITION (EVP)

The EVP represents the set of benefits, values, and experiences a company offers its employees in exchange for their talent, commitment, and performance. In the context of a HUB, where cultural and functional diversity is high, a solid EVP can make the difference in attracting and retaining talent.

Professionals are typically motivated by five fundamental pillars:

- 1. Purpose:** Working in an organization with a clear and meaningful mission increases the sense of belonging and commitment.
- 2. Projects:** Participating in challenging, cross-functional,

global, and high-value-added initiatives is key to professional development.

3. Team: The quality of relationships with leaders and colleagues directly influences the work experience. A collaborative, inclusive, and supportive environment fosters talent retention.

4. Development: Training opportunities, internal mobility, and professional growth are highly valued. Companies that invest in employee development strengthen their value proposition and their capacity for innovation.

5. Well-being: Flexibility, work-life balance, and health and wellness initiatives are increasingly decisive in a professional's decision to join or remain in an organization.

Compensation also plays a key role in talent attraction and retention. In the mid-range segment (€40,000–€80,000), it is possible to attract profiles with digital competencies and international experience. In the lower ranges (€20,000–€40,000), roles tend to be more operational and exhibit higher turnover, requiring specific retention and professional development strategies.

SOURCING MODEL

The sourcing model defines how talent provision is structured within the HUB: who performs the functions, from where, and under what arrangement. It is an essential component for ensuring the scalability, efficiency, and sustainability of the operating model.

Companies typically combine three main talent sources:

- **Internal talent:** Promoting internal mobility leverages existing knowledge, reinforces corporate culture, and accelerates integration. It is especially useful in strategic functions or during the HUB's early phases.
- **External talent:** Bringing in external profiles, both nationally and internationally, contributes new perspectives, skills, and diversity. It is key to filling

knowledge gaps, driving cultural transformation, or incorporating emerging capabilities (such as AI, advanced analytics, etc.).

- **Outsourcing:** Collaboration with specialized providers enables coverage of specific needs, rapid scaling of certain functions, or access to technical talent that is difficult to recruit directly. This option can be efficient in terms of cost and agility, although it requires rigorous quality and culture management.

Additionally, the sourcing model may include variants such as:

- **Offshoring:** Establishing part of the team in countries with lower operating costs while maintaining cultural or geographic proximity.
- **Hybrid models:** A combination of internal teams, relocated talent, and external providers, adapted according to the type of service and the countries in scope.
- **Phased sourcing:** Progressive talent onboarding aligned with the HUB's implementation model (e.g., prioritizing Tier 1 countries).

Finding specific talent — especially for senior or globally scoped roles — can be challenging. Therefore, it is important to maintain realistic expectations, design agile selection processes, and offer a differentiating value proposition that combines purpose, development, and well-being.

Funding Model

The funding model determines how the costs associated with the HUB's creation, operation, and evolution are distributed, and who assumes financial responsibility within the organization. This decision directly impacts the HUB's level of autonomy, its investment capacity, and its alignment with corporate objectives.

There are three main funding models, which can be combined depending on the organizational context:

- **Central funding (corporate):** The HUB's budget comes directly from global headquarters. This model enables greater strategic alignment, facilitates significant initial investments, and supports structured long-term planning. However, it can limit operational flexibility if financial control is highly centralized.
- **Regional funding:** The HUB is financed through the budgets of a specific region (e.g., Europe, LATAM, EMEA). This approach offers greater proximity to operational needs and can accelerate decision-making, although it requires clear governance to avoid imbalances if the HUB serves countries outside the funding region.
- **Local funding (country-level):** Each country receiving HUB services contributes financially based on usage or activity volume. This model promotes co-responsibility and local commitment but can hinder scalability if some countries are unwilling to fund. It also requires precise mechanisms to measure and allocate costs.

In many cases, companies opt for hybrid models, where the initial investment is covered at the corporate level and operational costs are shared among regions or

countries based on the HUB's scope and usage. This flexibility enables adaptation of the model to the center's evolution, its degree of maturity, and the type of services offered, ensuring sustainability, transparency, and strategic alignment.

Implementation Model

The implementation of a pharmaceutical HUB is not merely an operational matter but an organizational transformation process that requires strategic vision, leadership, and carefully planned execution. The model's success depends not only on the services being centralized but on how the deployment is carried out and with whom it is built.

Implementation demands effective coordination among teams that, in many cases, start from misaligned interests. This can generate doubts, friction, and resistance. Therefore, it is essential to secure the active commitment of the leadership team, both at the global and local levels. The leaders involved must possess business understanding, medium-term vision, organizational influence, and — above all — generosity to facilitate change. Without this commitment, the risk of implementation failure is significant.



An effective strategy for mitigating risks during implementation is the definition of pilot projects, which allow controlled validation of the proposition's value, build trust among teams, and facilitate the HUB's landing. These pilots can be implemented at the country or service level and must be carefully selected: ideally, representative countries should be chosen based on business size and organizational dynamics, with mature local teams willing to collaborate. Pilots enable the HUB team to prepare before scaling its functions, obtain internal credentials, and convince undecided leaders. However, it is important to achieve certain milestones within a short timeframe, as delays can dilute interest and stall the initiative.

In this regard, many organizations opt for a progressive approach, prioritizing implementation in Tier 1 countries, which typically have higher business volumes, more mature structures, and greater collaboration capacity. This approach enables rapid value demonstration, generates internal traction, and allows the model to be refined before scaling to Tier 2 and Tier 3 countries.

Implementation speed is also a critical factor: moving too slowly can jeopardize the initiative, while moving too quickly without adequate preparation can create friction. Likewise, a forced implementation — for example, imposed from headquarters without local consensus — tends to be more painful for all parties. This approach is only justified in contexts of global restructuring triggered by high-impact events.

Additionally, one of the key elements in this phase is talent acquisition, which must be approached strategically and in a structured manner. The process begins with a clear definition of the required profiles, which typically include functional experts, digital profiles, professionals with a continuous improvement mindset, and cultural and cognitive diversity. During interviews, it is essential to maintain a coherent narrative between HR and the functional teams, highlighting the benefits, development opportunities, and the HUB's purpose. This coherence is critical for attracting talent aligned with the project's vision.

Ultimately, the implementation model must be progressive, collaborative, and adapted to each organization's context.



From Plan to Reality: How to Make the HUB Work and Prevent Failure

Organization and Culture: Initial Challenges

The implementation of a pharmaceutical HUB entails a series of organizational challenges, particularly in the early stages. One of the primary obstacles is **resistance to change from middle management (MM)**, who may perceive the new structure as a threat to their current role. This resistance can manifest in various ways:

- 1. Loss of control and authority:** Middle managers may feel they are losing influence over their teams and processes, generating insecurity and opposition. To mitigate this effect, it is essential that senior leaders clearly communicate the benefits of the change and provide consistent support throughout the transition.
- 2. Uncertainty and fear of change:** Structural transformations typically raise questions about new roles, responsibilities, and processes. This uncertainty can translate into a lack of commitment. Transparent communication that explains the strategic objectives and expected benefits is key to building trust and aligning teams. More than half of the experts interviewed noted that this is one of the main challenges when implementing a HUB. In their own words: *"Change management is a major challenge, especially in countries where there is very little turnover and the team is very comfortable."*
- 3. Knowledge transfer:** The migration of functions to the HUB requires an effective transfer of local knowledge. This process can be hindered by the tacit nature of knowledge and cultural differences between local units and the HUB. To facilitate this transition, it is recommended to implement mentoring and coaching programs and leverage technology tools that enable the documentation and sharing of best practices.

4. Adaptation to new roles: Restructuring may involve a redefinition of functions for middle managers. Offering training and professional development programs is essential to ensure these profiles can adapt and perform effectively in their new responsibilities. As the experts indicate: *"Growing very fast is complicated and poses a resource challenge, as people need to be trained and the team needs to feel comfortable and start operating in the shortest possible time."*

5. Cultural shift: The creation of a HUB often implies a change in organizational culture. Fostering a culture based on collaboration, trust, and open communication is essential to reduce resistance and facilitate successful integration.

To address these challenges, the commitment and leadership of senior management is decisive. Key strategies include:

- **Clear and consistent communication:** Timely information about changes, their rationale, and benefits helps reduce uncertainty and build alignment.
- **Active involvement of middle management:** Engaging them in the design and implementation of the change increases their sense of ownership and reduces resistance.
- **Training and support:** Providing specific tools and training to facilitate the transition to new roles and processes.

Additionally, it is essential to have an **operational HUB leader**, typically in the form of a project manager, who assumes responsibility for day-to-day operations. This role, which may have regional or global scope, must coordinate resources, manage timelines, and ensure that projects are executed within budget and to the defined quality standards.



Value Creation: How to Achieve Success?

To identify the HUB's operational and strategic challenges, as well as to evaluate its level of success, it is essential to define and monitor **Key Performance Indicators (KPIs)** from the outset. These must be agreed upon with the global team and serve as a clear guide on expected outcomes.

FUNDAMENTAL KPIS FOR HUB SUCCESS:

- **Operational efficiency gains:** One of the most relevant KPIs is the HUB's ability to reduce operational costs. This can be achieved through process optimization, negotiation of better terms with suppliers, or the implementation of technologies that increase efficiency. Cost reduction not only improves profitability but also frees up resources that can be reinvested in strategic areas of the organization.
- **Value generation:** Beyond savings, the HUB must demonstrate its ability to deliver tangible value to the organization. This may be reflected in the development of new products or services, continuous improvement of key processes, or support for initiatives that drive business growth. KPIs should capture how the HUB contributes to the company's competitiveness, innovation, and sustainability.
- **Employee engagement:** Maintaining team commitment and motivation is essential for the HUB's sustained success. KPIs should include metrics related to job satisfaction, professional development opportunities, leadership perception, and work environment. An engaged team is more productive, resilient, and likely to remain in the organization.
- **Internal client satisfaction:** The quality of service offered by the HUB must be measured from the perspective of internal clients. This includes response speed, problem-solving capacity, technical service quality, and communication transparency. The trust generated through consistent, high-quality service is key to building strong relationships with internal stakeholders. In this regard, continuous client feedback is a valuable tool for identifying improvement opportunities and ensuring the HUB is meeting expectations.

STRUCTURAL AND CULTURAL DRIVERS OF SUSTAINABILITY:

Beyond KPIs, structural and cultural factors determine the HUB's sustainability over time. These drivers must be proactively managed to ensure the continuity and evolution of the operating model:

- **Low staff turnover:** Maintaining low turnover is fundamental to preserving institutional knowledge, reducing hiring and training costs, and maintaining team cohesion. To achieve this, it is necessary to offer an attractive work environment with clear growth and recognition opportunities. According to the experts, "the key to success is ensuring there is no turnover." Some interviewees recommend a turnover rate of around 5% for sustainability.
- **Leadership that develops and nurtures the team:** Having a layer of managers committed to their teams' development is a critical factor. These leaders must be capable of identifying and fostering talent, providing constructive feedback, and creating a positive and collaborative work environment. Effective leadership directly impacts productivity, workplace climate, and talent retention.
- **Trust-building service:** Trust is an intangible but essential asset. Honoring commitments, delivering high-quality service, and maintaining transparent communication are key elements for building lasting relationships with internal clients and other stakeholders. The HUB's reputation largely depends on its ability to generate this trust on a sustained basis.
- **Evolution toward a strategic HUB:** It is important that the HUB does not remain confined to being a services center focused on efficiency and cost reduction. Its evolution toward a strategic HUB involves delivering added value, anticipating business needs, innovating in processes and services, and becoming a key partner for operational units. This transformation positions the HUB as an engine of growth and competitiveness within the organization.

Conclusions

The Iberian Peninsula stands as a highly attractive option for the establishment of pharmaceutical HUBs, thanks to a combination of structural, social, and economic factors that favor both talent attraction and long-term investment. Cities such as Barcelona, Madrid, and Lisbon have consolidated themselves as hubs of innovation and excellence, offering an ideal environment for attracting international talent. Their pleasant climate, quality of life, multicultural environment, and the presence of prestigious business schools make these cities highly competitive destinations for qualified professionals.

Historically, the region's appeal has been associated with its competitive cost-benefit ratio. However, today, the Iberian value proposition has evolved toward positioning based on quality, excellence, and reliability. This transformation reinforces the perception of both countries as a strategic destination — not only for economic reasons but for its ability to generate added value within the global health ecosystem.

Ultimately, for companies considering the implementation of a pharmaceutical HUB in Spain or Portugal, it is essential to approach the process with a structured, strategic, and realistic vision. To this end, it is critical to establish a framework that enables a review of the key elements for designing and launching a HUB: from defining the strategic objective to the operational

details. Implementing a HUB requires committed leadership, rigorous planning, and execution adapted to each organization's context. It is not enough to define which services will be centralized; it is imperative to decide how it will be implemented, with which teams, in which countries, and at what pace. Cross-functional collaboration, the design of strategic pilots, and the commitment of both global and local leadership are determining factors for success.

Furthermore, for the Iberian Region to consolidate its position as a leading pharmaceutical HUB in Europe, it will be key to foster alliances among universities, research centers, and companies, and to adapt the education system to the sector's real needs. The creation of specialized programs in areas such as data science applied to health, advanced pharmacology, or pharmaceutical operations management can accelerate the development of highly qualified talent and facilitate the evolution of the HUB model.

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