



European Federation of Pharmaceutical Industries and Associations

# EFPIA Annual Report 2016

# Unlocking tomorrow's cures





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*As I look to the future with EFPIA, we are committed to working with EU institutions and member states to find solutions to make medicines accessible and healthcare more sustainable*

## Introduction

### An age of innovation, challenges and opportunities



NATHALIE MOLL  
Director General  
EFPIA

Innovation is at the heart of everything we do. Our industry employs over 100,000 scientists and researchers in Europe, working to find new treatments and cures to alleviate suffering, extend life and improve the quality of life for patients across the globe.

It requires vision, commitment, dedication and often endless experimentation with no guarantees of success, but the results of all this endeavour are exciting. We have witnessed transformational change in how we treat diseases like cancer, hepatitis C, HIV and cardiovascular disease. Over the next 5 years, we will see new therapies emerge, such as combination therapies for cancer, disease modifying therapies for Alzheimer's, antibacterial monoclonal antibodies to target antimicrobial resistance, gene therapies against haemophilia, cell therapies against diabetes type 1 and CAR-T therapies targeting blood cancers. These innovative treatments have the potential to bring great benefits to patients and their families in terms of survival and quality of life, saving resources in healthcare systems and offering benefits to the broader society in terms of a healthier workforce.

At the same time, we recognise that introducing high-impact innovation can create challenges for healthcare systems under pressure from an ageing population and increased levels of chronic disease. The key to managing these challenges is partnership in identifying new breakthroughs and transformative technologies well in advance, thus allowing time for industry and governments to work together to plan their introduction into healthcare systems.

As I look to the future with EFPIA, we are committed to working with EU institutions and member states to find solutions to make medicines accessible and healthcare more sustainable, whilst securing future medical innovation and contributing to economic growth. That means realising the potential of healthcare data to support outcomes-focused approaches, developing more flexible solutions to financing new technologies and ensuring that the incentives framework continues to support the level of medical innovation, research and development that will help patients, healthcare systems and society address the challenges they face.

The annual report underlines in numbers, the impact of the therapies we discover, develop and deliver to patients, as well as the commitment of our industry to innovation and economic growth. EFPIA will continue to work with partners across the spectrum of issues that relate to our industry, from science and regulation, to manufacturing, healthcare, ethics and trade.

Nathalie Moll

## Foreword by the President



*As there remains significant unmet medical need in Europe and across the globe, our industry is determined to continue the search for effective solutions* ”

2016 marked another year of impressive scientific progress for our industry. EMA approved 81 new medicines, including 16 medicines for rare diseases, which affect less than 5 in 10,000 Europeans.



JOE JIMENEZ  
EFPIA President  
CEO Novartis

Additionally, 59 existing products were approved in new indications. These recent successes are the result of continued investment and dedication of pharmaceutical companies in the fight against disease. And they are only the beginning of an exciting wave of medical innovation expected to come to market in the coming years. Cell and gene therapy, combination treatments or immunotherapy could provide much needed breakthroughs for patients in Europe and beyond. Many companies are also investing beyond the pill, providing digital offerings that further contribute to improved care and better outcomes for patients.

As there remains significant unmet medical need in Europe and across the globe, our industry is determined to continue the search for effective solutions, whether for chronic diseases that affect millions or for rare disease that affect only a few. But medicines innovation remains complex and is unavoidably rife with failure, and it can only continue in an innovation-friendly environment, with strong intellectual property protection. Its competitive incentive system has so far allowed Europe to be at the forefront of medical research. However, this competitive position and the great potential of the

7,000 medicines that reside in industry pipelines have been put at great risk with the recent initiation of the European incentives review.

The incentive system we have today is by no means perfect. In fact it needs to be strengthened and become more tailored to the specific public health challenges we face. The orphan disease incentive that was introduced to drive development of medicines for small patient populations is a great example of such a tailored approach, and it works. Following its introduction in 2000, investment in rare disease R&D grew by 210% in just 8 years. 119 medicinal products for about 90 rare conditions were developed since, addressing the needs of many patients who previously had no treatment options.

But more needs to be done. Take the example of anti-microbial resistance (AMR), possibly one of the largest public health threats of our time. The key to addressing AMR is the use of antibiotics only in patients who need them and strict limits on volumes sold. However, this by definition creates a disincentive to develop these new medicines, as they are held in reserve and not used. Targeted incentives are needed to drive investment into this area and to

reward innovators. We also still don't have effective treatments for debilitating diseases such as Alzheimer's, an increasing challenge, given our ageing populations. And while we have made great progress in the area of rare diseases, the search for solutions has to continue, an enormous task given that about 6,000 such rare diseases exist.

We know that innovation is our best means of tackling those challenges and incentives are the most effective tool we have to unlock new solutions by attracting investment and the brightest minds to fight disease. At EFPIA we are proud of the successes of our industry, and we remain fully committed to work hard to deliver the healthcare solutions that our citizens and healthcare systems need. We look forward to continued collaboration with all stakeholders to ensure Europe remains at the forefront of medicines innovation.

Joe Jimenez



# About EFPIA

The European Federation of Pharmaceutical Industries and Associations (EFPIA) represents the pharmaceutical industry operating in Europe. Through its direct membership of 33 national associations and 40 leading pharmaceutical companies, EFPIA is the voice on the EU scene of 1,900 companies committed to researching, developing and bringing to patients new medicines that will improve health and the quality of life around the world.

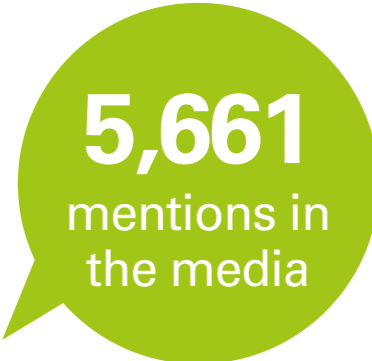
## EFPIA specialised groups

European Biopharmaceutical Enterprises (EBE) represents the voice of biopharmaceutical companies of all sizes in Europe. Established in 2000, EBE is recognised as the leading biopharmaceutical association in Europe.

Vaccines Europe (VE) represents major innovative research-based global vaccine companies as well as small and medium-sized enterprises operating in Europe.



2 specialised groups



3000 subscribers to the EFPIA newsletter



# EFPIA Activity 2016

## TRADE

Director-General Richard Bergström participated in the high-level Gaidar Forum in Moscow with the Deputy Prime Minister Shuvalov, Health Minister Skvortsova and Trade Minister Manturov.

## AMR

EFPIA and over 85 pharmaceutical, biotech and diagnostic companies published the so-called Davos Declaration on combating antimicrobial resistance.

## BIOSIMILARS

EFPIA, along with EBE and IFPMA, launched a position paper on “Considerations for physicians on switching decisions regarding biosimilars”.

## OUTCOMES-FOCUSED HEALTHCARE

Launch of the consensus document “Enhancing Value in European Health Systems – the role of outcomes measurement”, in the European Parliament, developed by a broad coalition of stakeholders, including patient organisations, academics, healthcare institutions and industry, together with EFPIA and a number of EFPIA members.

## HEALTHCARE SYSTEMS

EFPIA supported the BIAC Forum on Innovation, Health and Well-Being held at OECD in Paris, with participation from Richard Bergström.

## TRADE

EFPIA launched its TTIP Economic Study, conducted by Copenhagen Economics, with the participation of TTIP negotiators, MEPs and other key stakeholders in the European Parliament.

EFPIA Joint Industry Strategy Session, together with global sister associations in Beijing, which included high level meetings with Chinese authorities from 5 different ministries, and EU and US officials.

## HEALTHCARE DATA

The Data Protection Regulation was adopted and contains positive provisions to support the use of data in research.

## TRADE SECRETS DIRECTIVE

Adoption of the Trade Secrets Directive by the European institutions, establishing standard rules against the unlawful acquisition, disclosure and use of trade secrets.

## REGULATORY AFFAIRS

Regulatory Team compiled the response on behalf of Innovation Board Sponsored Committee of EFPIA, Vaccines Europe and EBE on Commission survey DDG2/RS/(2016) Impact of Regulation on Innovation.

## HEALTHCARE SYSTEMS

EFPIA organised a roundtable event on the future of cancer care with key stakeholders. In parallel a series of national roundtable discussions have occurred in 10 Member States over the course of 2016/17.

## TRADE

For the first time, and following dedicated EFPIA advocacy, an industry workshop was organised along the margins of the EU-India High Level Regulatory Dialogue (HLRD). EFPIA coordinated a joint industry presentation with AESGP and Medicines for Europe, which highlighted key regulatory issues in India.

## REGULATORY AFFAIRS

EFPIA Clinical Trials and Transparency priority working group coordinated the launch of a comprehensive survey jointly with PhRMA on the membership implementation of Principles of Responsible Clinical Data Sharing.

## HEALTHCARE SYSTEMS

EFPIA organised a roundtable on outcomes measurements in Health Systems Performance Assessment, hosted by the Belgian National Institute for Health and Disability Insurance, with participation from the Commission, the OECD and WHO Europe.

EFPIA organised a workshop, chaired by Richard Bergström, on “personalised prevention” during European Health Forum Gastein, to discuss the future of prevention in the light of developments in big data, digital health and personalised medicine.

## OUTCOMES-FOCUSED HEALTHCARE

Launch of “Healthier future – The case for outcomes-focused, sustainable healthcare”

## TRANSPARENCY

EFPIA engagement in the debate with policy makers in the context of the European Commission proposal for an Interinstitutional Agreement on a mandatory Transparency Register.

## TRADE

Director-General Richard Bergström led the EFPIA team participating in the Pharma Vision 2016 Joint Strategy Session in Ankara, organised together with AIFD and PhRMA, which included a high-level meeting with the Deputy Prime Minister of Turkey, Mehmet Simsek.

## AMR

Following the Davos Declaration in January and ahead of the UN General Assembly High-Level Meeting on Antimicrobial Resistance, 13 leading companies, including EFPIA members presented a new roadmap that lays out four key commitments they will deliver by 2020, to reduce antimicrobial resistance.

## ACCESS TO MEDICINES

EFPIA engagement in the debate with policy makers and stakeholders in the context of the European Parliament INI report on EU options for improving access to medicines.

## PATIENT ACCESS PARTNERSHIP (PACT)

EFPIA as a member of the PACT Steering Committee, helped organise the PACT Regional Conference in Sofia.

## REGULATORY AFFAIRS

ICH Assembly approves Brazilian drug regulatory authority ANVISA and Korean drug regulatory authority MFDS as new members of ICH, which is the first step towards ICH globalisation.

## PATIENT ACCESS PARTNERSHIP (PACT)

EFPIA, as a member of the PACT Steering Committee, helped organise the MEP interest group on access to healthcare.

## Regulatory Affairs

The multi-stakeholder awareness raising campaign #Medsdisposal.eu reached some milestones such as YouTube video being translated into most European languages and Twitter impressions reaching over 2.5 Million.

## Animal Welfare

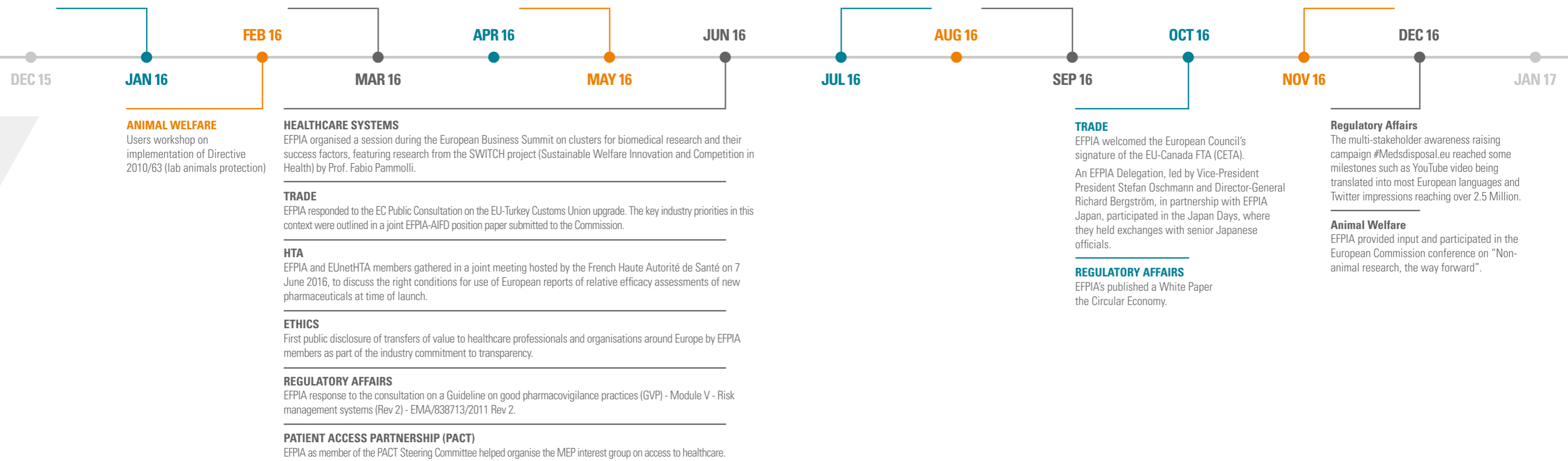
EFPIA provided input and participated in the European Commission conference on “Non-animal research, the way forward”.

## TRADE

EFPIA welcomed the European Council’s signature of the EU-Canada FTA (CETA). An EFPIA Delegation, led by Vice-President President Stefan Oschmann and Director-General Richard Bergström, in partnership with EFPIA Japan, participated in the Japan Days, where they held exchanges with senior Japanese officials.

## REGULATORY AFFAIRS

EFPIA’s published a White Paper the Circular Economy.

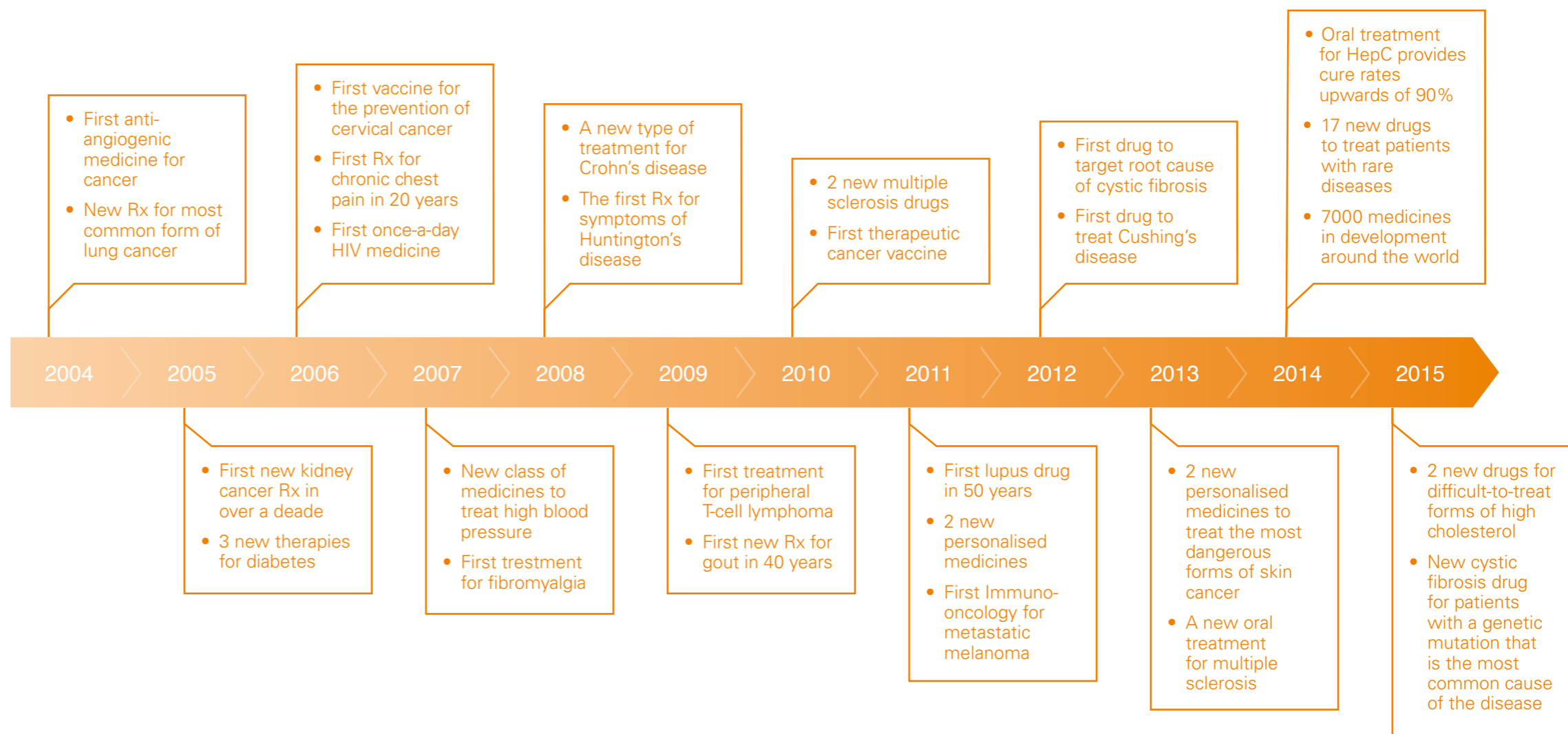


# Innovation in numbers

Innovation is in our industry's DNA. It's the vehicle by which we improve patients' lives, evolve the way we manage healthcare and benefit wider society. But our innovation gene is just the start. Expressing it requires time, great people, significant resources, collaboration across sectors and borders and often-endless experimentation to search out new breakthroughs.

The prize: discovering and developing treatments that mean alleviating suffering, extending life and improving its quality is something EFPIA, EBE and Vaccines Europe members are dedicated to realising.

## Biopharmaceutical companies around the world have driven a decade of advances in medicines



Note: Dates of innovation provided by the US Food and Drug Administration (FDA). Source: Health Advance analysis; PhRMA 2015 Biopharmaceuticals in Perspective.



# Innovation in numbers

With over 7000 medicines in development, the exciting new wave of medical innovation will play a key role in addressing the challenges faced by patients and healthcare systems



CANCERS



CARDIOVASCULAR DISORDERS



DIABETES



HIV/AIDS



IMMUNOLOGICAL DISORDERS



INFECTIOUS DISEASES

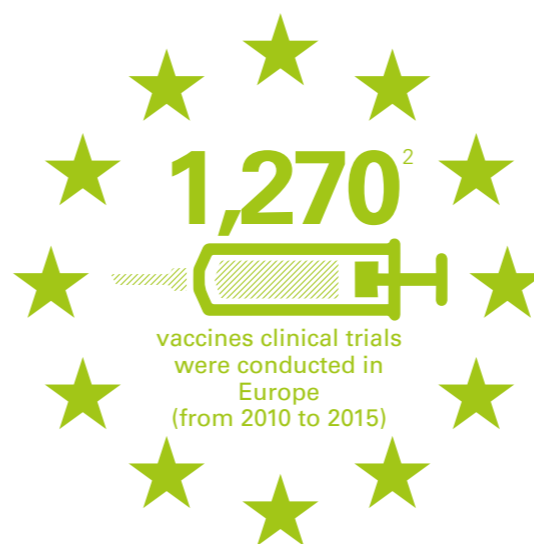
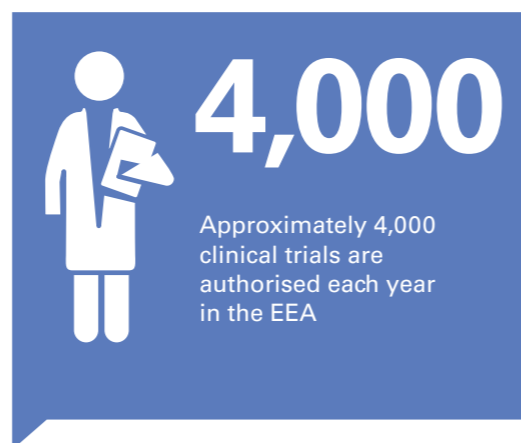


MENTAL HEALTH DISORDERS

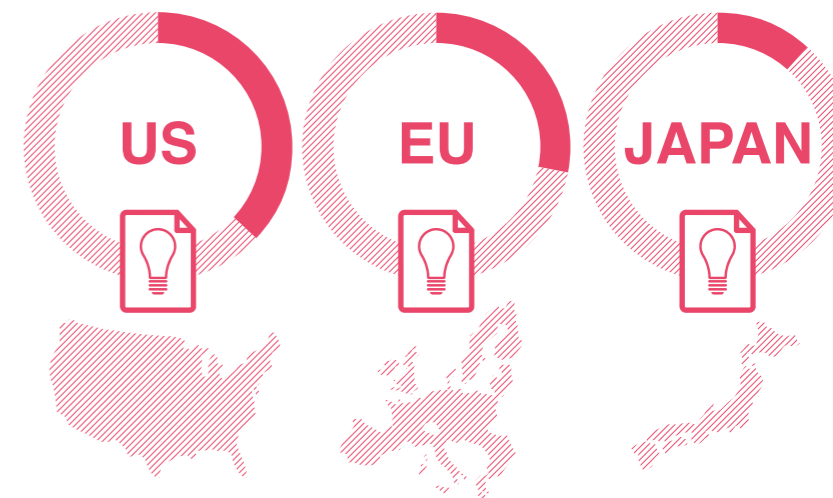


NEUROLOGICAL DISORDERS

16 of the 27 medicines are biologic medicines, including one vaccine and 2 advanced therapies. 1 of the remaining 11 new substances is a personalised (precision) medicine



Share of countries in biotechnology patents for the time period 2010-2013 (published by OECD in 2016):<sup>3</sup>



<sup>1</sup>[http://www.ema.europa.eu/docs/en\\_GB/document\\_library/Leaflet/2017/01/WC500219736.pdf](http://www.ema.europa.eu/docs/en_GB/document_library/Leaflet/2017/01/WC500219736.pdf)

<sup>2</sup>A STRATEGIC EUROPEAN ROADMAP FOR THE VACCINES OF TOMORROW: A JOINT STAKEHOLDER REFLECTION [http://iprove-roadmap.eu/wp-content/uploads/2016/06/IPROVE-ROADMAP\\_JUNE2016\\_WEB.pdf](http://iprove-roadmap.eu/wp-content/uploads/2016/06/IPROVE-ROADMAP_JUNE2016_WEB.pdf)

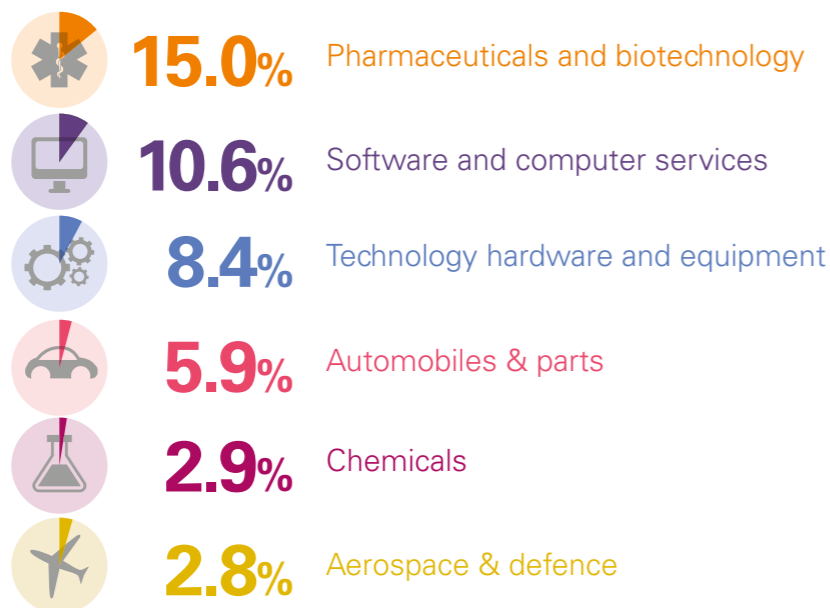
<sup>3</sup><http://www.oecd.org/sti/biotech/keybiotechnologyindicators.htm>



# Innovation in numbers

The biopharmaceutical industry invests more of its revenue in generating **new knowledge through research and development than other sectors**

R&D SPENDING AS A PERCENTAGE OF NET SALES, 2015



Source: The 2016 EU industrial R&D investment scoreboard, European Commission, JRC, DG RTD.

2015 R&D investment at European biotechnology companies rose 11% compared to 2014<sup>4</sup>  
**11% rise**

**€900 billion**  
The pharmaceutical industry is expected to invest close to €900 billion in research and development from 2015-2020.

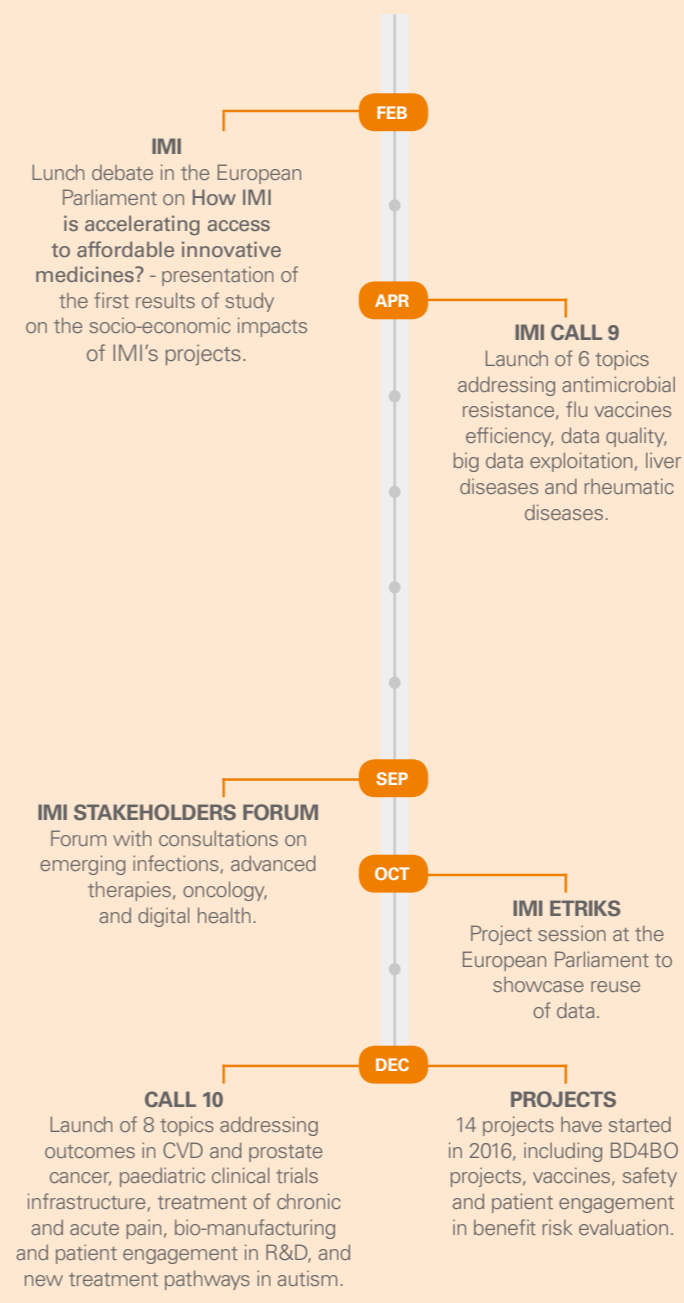
**1 out of 6**  
1 out of 6 people employed by the pharmaceutical industry has a highly skilled R&D position

## Fostering Innovation

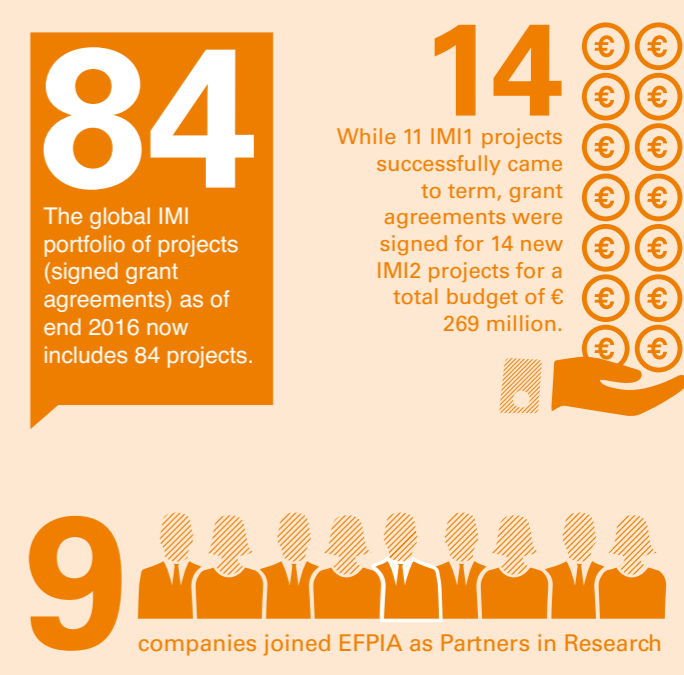


To find out more about the role of intellectual property in fostering innovation, watch our video.

## IMI Timeline 2016



## IMI Key facts and figures 2016

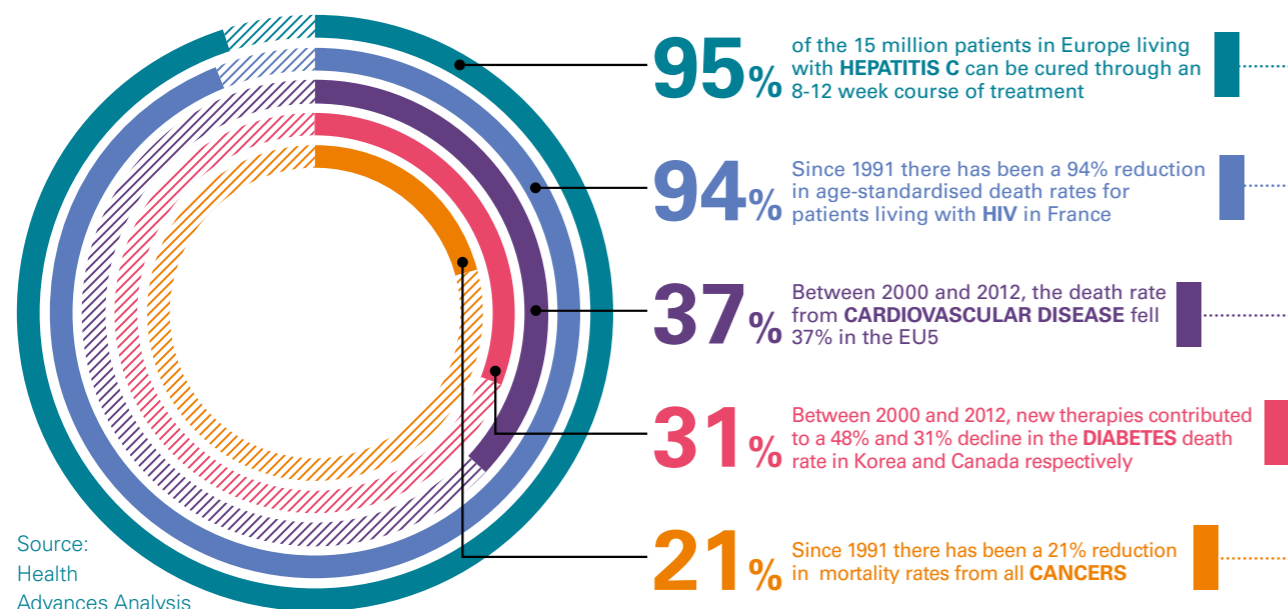


**€442.3 million** 2 calls were launched, including 16 topics, with a total budget € 442.3 million, for which 19 proposals were selected for funding.

<sup>4</sup>http://www.ey.com/Publication/vwLUAssets/EYbeyond-borders-2016/\$FILE/EYbeyond-borders-2016.pdf

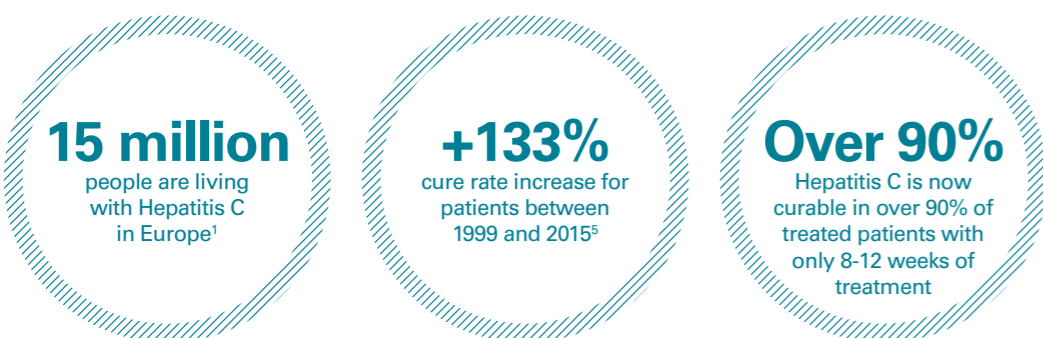
# The impact of medicines

Medicines are some of the most powerful tools in treating and curing diseases



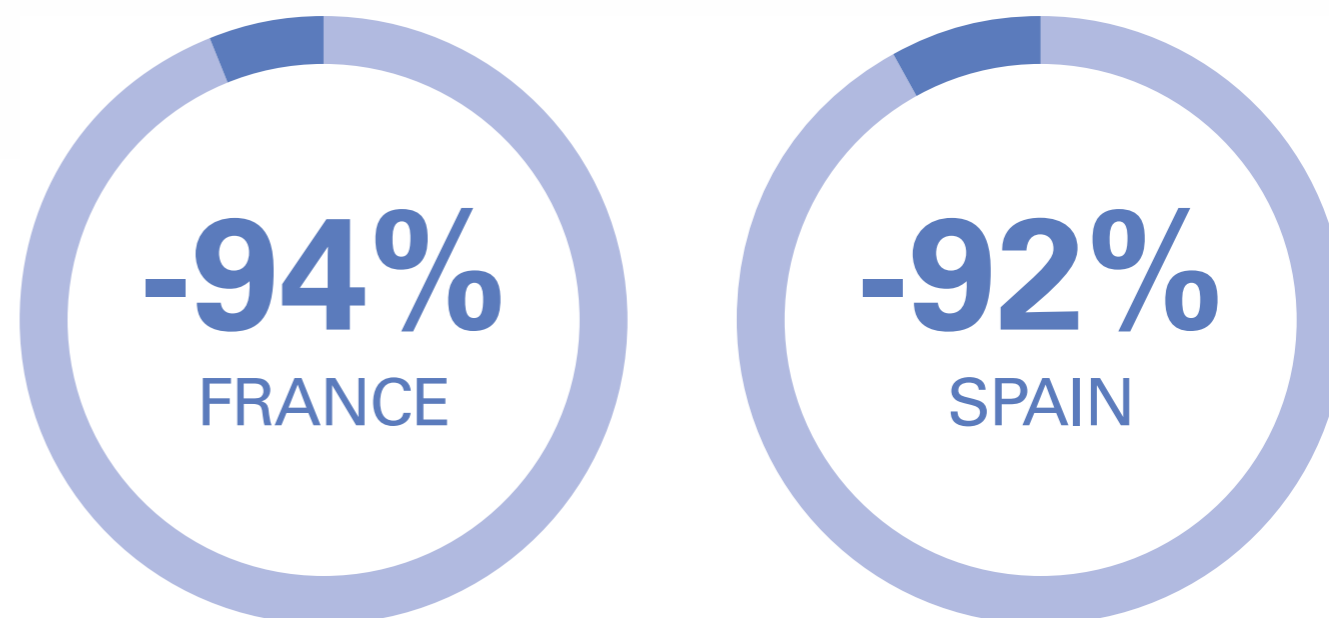
Source: Health Advances Analysis

## Hepatitis C (HCV)

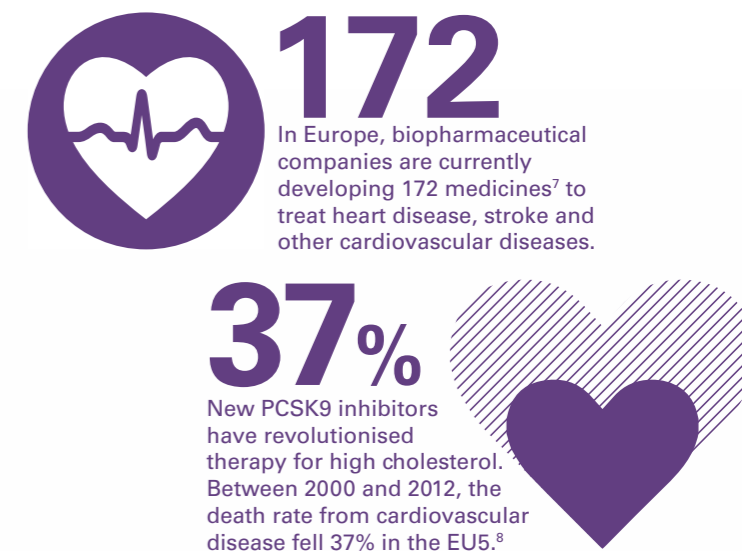
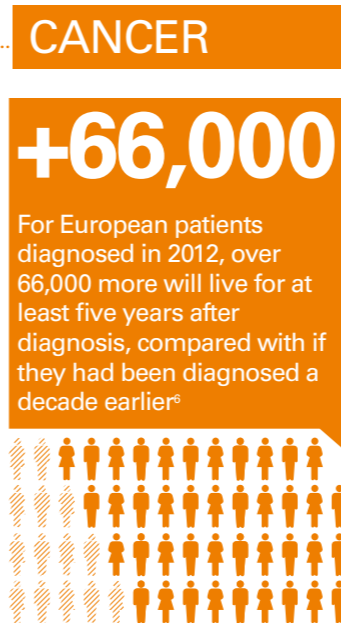


Medicines have transformed HIV/AIDS from a death sentence to **a manageable diseases**

## HIV/AIDS - Age Standardised Death Rate (ASDR)



## Cardiovascular Disease



<sup>6</sup>Calculations based on incidence figures quoted in Bengt Jönsson et al., Comparator Report on Patient Access to Cancer Medicines in Europe Revisited, 2016 - page 16: 2000-2002 5-year survival rate in all cancers in Europe: 51.55% 2000-2007 5-year survival rate in all cancers across Europe: 54%; Incidence in 2012 in Europe: 2,707,000

<sup>7</sup>Medicines in Phase I through III of development. Source: 1) Health Advances analysis; PharmaProjects (accessed February 2016)

<sup>8</sup>2) WHO Mortality Database (accessed February 2016)

# The impact of vaccines

Vaccines keep people **healthier for longer** and across all ages **preventing death and illness** from vaccine-preventable diseases

Vaccination programmes have had a significant impact on reducing mortality and morbidity throughout life from numerous infectious diseases



**2,000,000 - 3,000,000** lives saved every year worldwide<sup>9</sup>

Vaccination protects patients with chronic diseases. Influenza vaccination reduces by<sup>10</sup>



The risk of strokes after respiratory disease



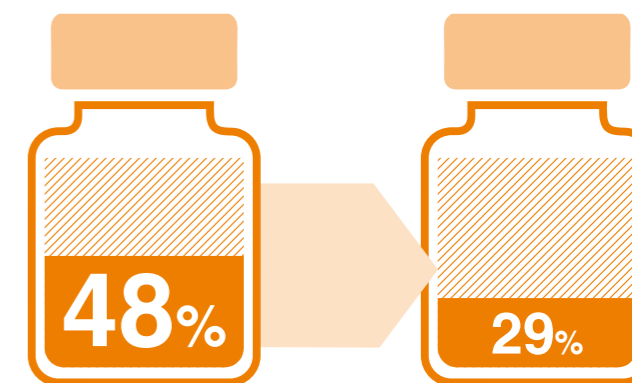
Heart attack occurrence



Death in diabetic patient

Vaccination helps fight against antimicrobial resistance (AMR)

The use of pneumococcal vaccine in France has reduced the use of antibiotics<sup>11</sup>



Vaccination is one of the most cost-effective public health interventions



Saved by avoiding 715,000 lost days of work and productivity thanks to Influenza vaccination.<sup>12</sup>



**25,000** lives spared per year

<sup>9</sup>WHO (2017) Immunization coverage Fact sheet <http://www.who.int/mediacentre/factsheets/fs378/en/>  
<sup>10</sup>Udell et al (2013); Association Between Influenza Vaccination and Cardiovascular Outcomes in High-Risk Patients, JAMA. 2013;310(16):1711-1720. doi:10.1001/jama.2013.279206

<sup>11</sup>Wilby et al. (2012), A review of the effect of immunization programs on antimicrobial utilization, Vaccine. Oct 12;30(46):6509-14. doi: 10.1016/j.vaccine.2012.08.03  
<sup>12</sup>Préaud et al. (2014), Annual public health and economic benefits of seasonal influenza vaccination: a European estimate, BMC Public Health 2014, 14:813 <http://www.biomedcentral.com/1471-2458/14/813>

# The impact of medicines

With over 7000 medicines in developments over the next 5-10 years, we see **major innovations** that will address this unmet need and bring **benefits** to **patients** and **society**



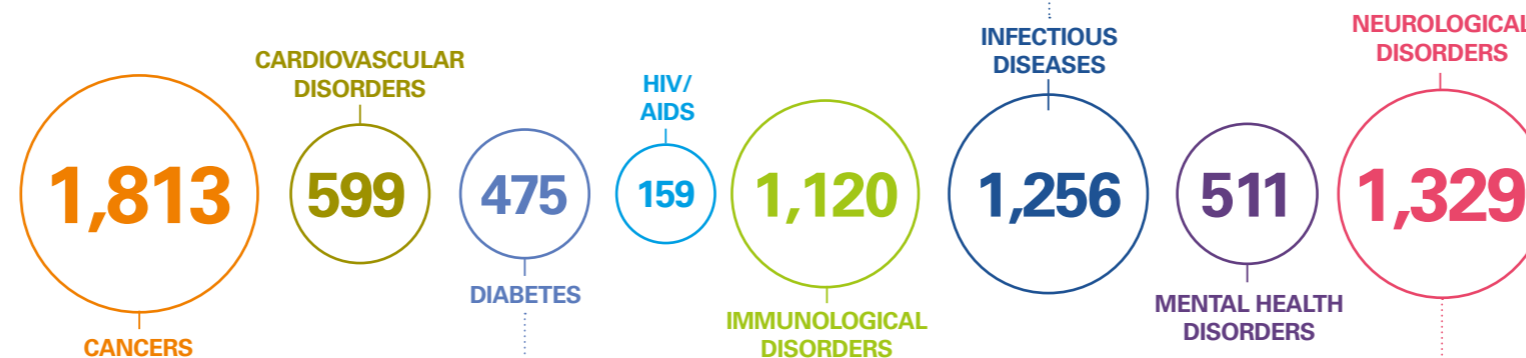
## Antibacterial treatments –

neutralise highly pathogenic bacterial surface proteins or secreted toxins and activate the immune system to kill the bacteria directly

**25,000** patients die from a serious, resistant bacterial infection every year, most of them in hospital

**€1.5 billion** are lost each year in extra healthcare costs and productivity losses from infections due to these selected MDR bacteria in the EU

**300 million people** worldwide are expected to die prematurely because of drug resistance over the next 35 years<sup>3</sup>



## CAR-T therapies –

CAR-T cells that have been genetically modified to allow the T cell to recognise and destroy tumour cells

**55-100%** CAR-Ts can reduce expenditure on targeted therapy by 55-100%

**Increased life expectancy**  
The curative impact of CAR-Ts is greatest in ALL\* where median age at diagnosis is 14 and could increase average life expectancy by 68 years

## Combination therapies –

increasing quality and quantity of life by combining targeted cancer treatments to increase their effectiveness

**30,000 deaths could be avoided** in NSCLC\*\* through combination treatment

**685 million EUR could be generated in GDP each year** for those NSCLC\*\* patients diagnosed in 2020

## Cell therapy –

insertion of living cells into patients to replace or repair damaged tissue, in order to facilitate improved organ or tissue functionality

**~ 650,000 sick days** due to hospitalisation could be avoided per year, which could lead to an increase in nominal GDP of ~ €16 billion

**~ 12,000 new cases** of blindness across the EU every year are estimated to be caused by diabetic retinopathy

**-30% in the number** of cardiovascular events in patients that do not receive intensive treatment

## Alzheimer's treatments –

seek to breakdown or inhibit the formation of protein plaques, helping to delay the onset and progression of Alzheimer's disease

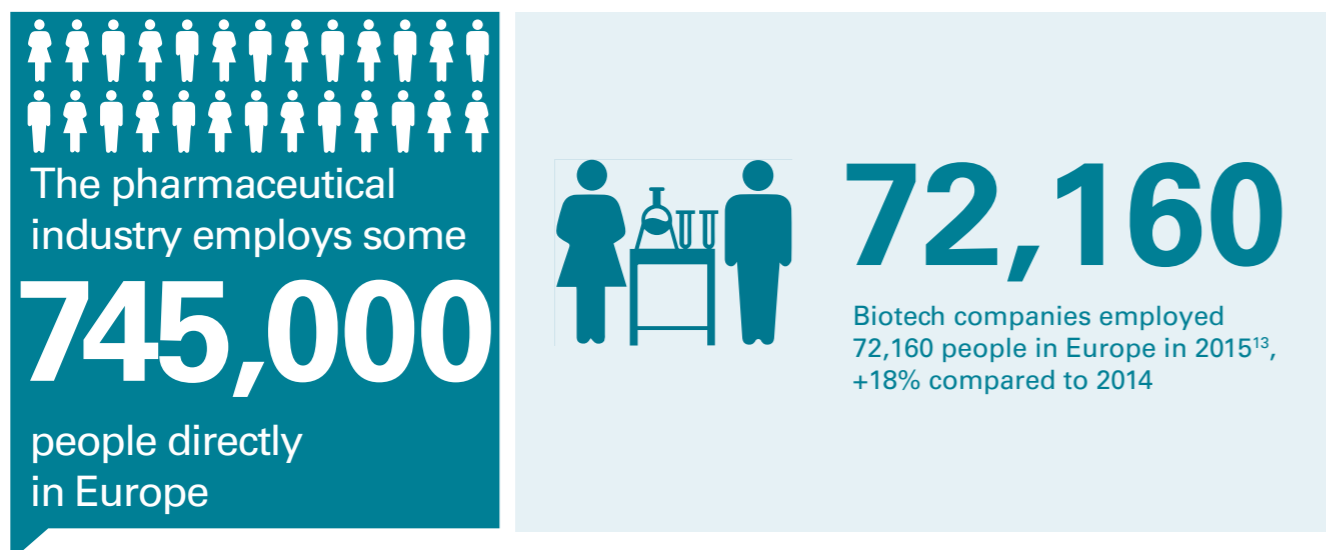
**€17 billion** is the current social care costs for Alzheimer's in Europe; new treatments may result in substantial savings

\* ALL - Acute Lymphoid Leukaemia  
\*\*NSCLC - Non small cell lung cancer

# The economic impact of the industry

The research based pharmaceutical industry is one of Europe's major high-technology industrial employers.

## Europe is a global leader in highly-skilled, science-based workforce

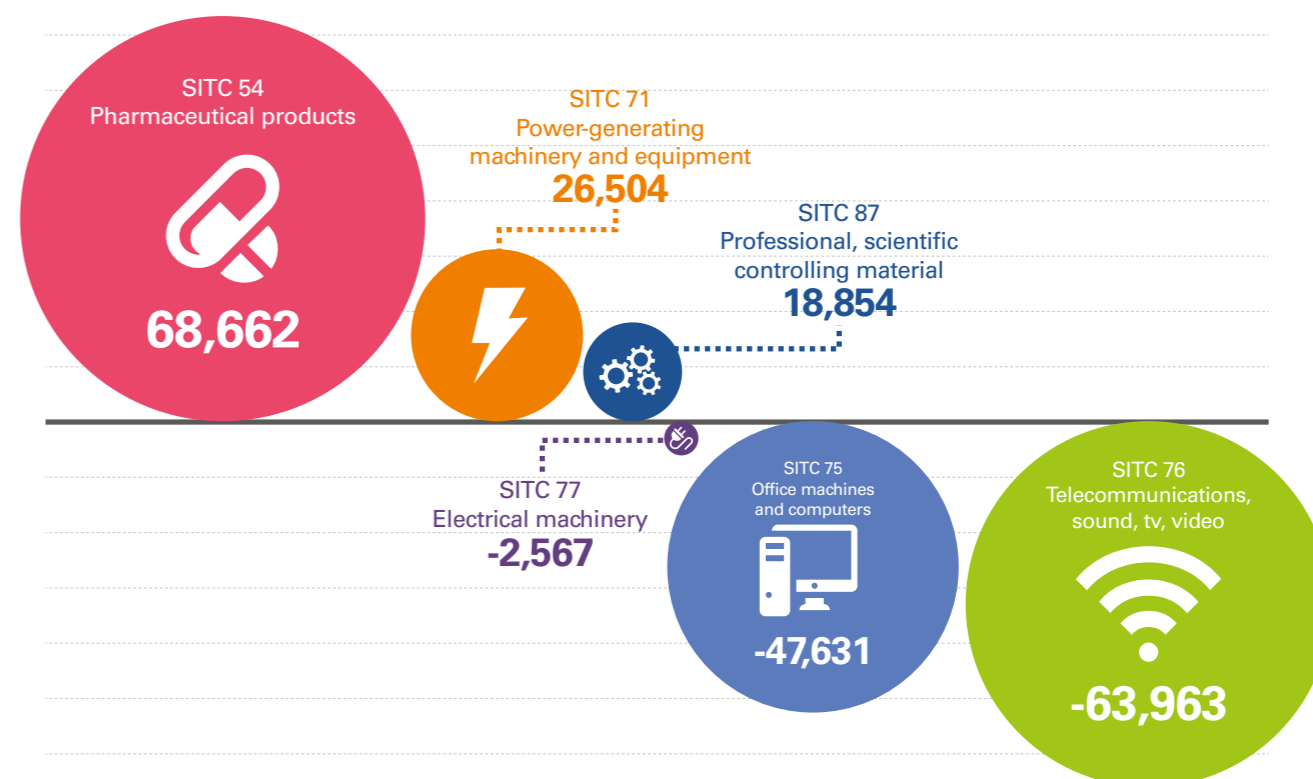


## Total worldwide employees of Vaccines Europe members in 2014



## EU-28 Trade balance - High Technology Sectors

The biopharmaceutical industry makes a significant contribution to the European economy.



Source: EFPIA member associations (official figures) - (e): EFPIA estimate.  
<sup>13</sup>http://www.ey.com/Publication/vwLUAssets/EY-beyond-borders-2016/\$FILE/EY-beyond-borders-2016.pdf

# The economic impact of the industry

## Driving employment in Europe



**KEY DRIVER**  
The pharmaceutical industry is a key driver of growth in the European economy

**5** Every job in the pharmaceutical industry supports 5 other jobs

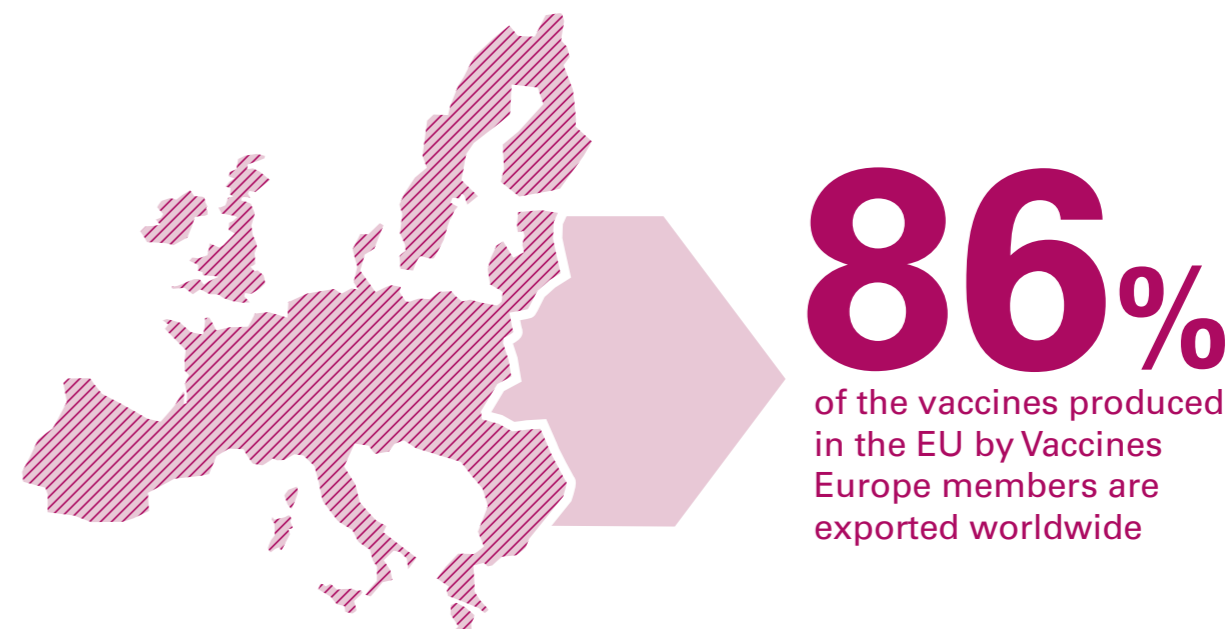
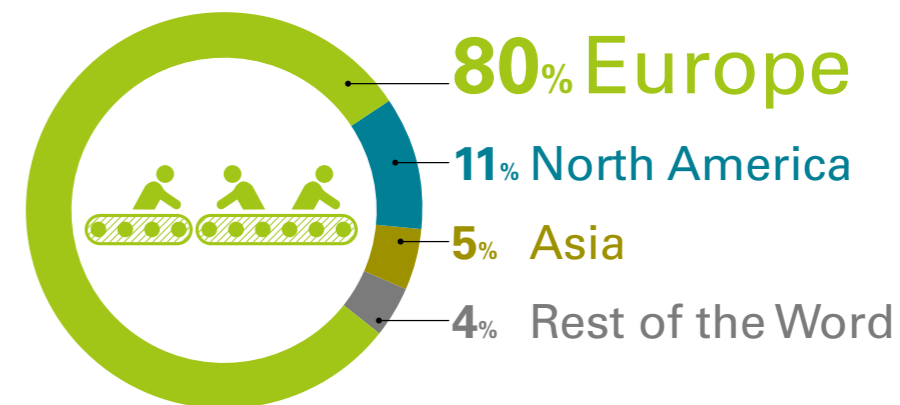
For every Euro of direct gross value added by the pharmaceutical industry, 1.3 Additional Euros are generated for the European economy

To find out more about the economic impact of the industry, view our animated infographics online.



## Europe is a long-standing leader in vaccines

Doses of vaccines produced by Vaccines Europe members by region in 2014, across 23 production sites



# EFPIA Members

## FULL MEMBERS

|                      |                   |              |
|----------------------|-------------------|--------------|
| ABBVIE               | ELI LILLY         | PFIZER       |
| ALMIRALL             | GLAXOSMITHKLINE   | PIERRE FABRE |
| AMGEN                | GRÜNENTHAL        | ROCHE        |
| ASTELLAS             | IPSEN             | SANOFI       |
| ASTRAZENECA          | JOHNSON & JOHNSON | SERVIER      |
| BAYER                | LEO PHARMA        | SHIRE        |
| BOGEN                | MENARINI          | TAKEDA       |
| BOEHRINGER INGELHEIM | MERCK             | TEVA         |
| BRISTOL MYERS SQUIBB | MSD               | UCB          |
| CELGENE              | NOVARTIS          |              |
| CHIESI FARMACEUTICI  | NOVO NORDISK      |              |

## AFFILIATE MEMBERS

|                       |
|-----------------------|
| BIAL                  |
| DAIICHI-SANKYO        |
| EISAI                 |
| ESTEVE                |
| H. LUNDBECK           |
| ORION PHARMA          |
| OTSUKA                |
| THE MEDICINES COMPANY |
| VIFOR PHARMA          |

## PARTNERS IN RESEARCH (PIR)

|                     |              |
|---------------------|--------------|
| ALCEDIAG            | MEDTRONIC    |
| BRUKER              | NOKIA        |
| CLARIVATE ANALYTICS | PIRAMAL      |
| COVANCE             | PMB ALCEN    |
| DETECOM             | PSYCHOGENICS |
| DEXCOM              | QUINTILES    |
| ELLEGARD MINIPIGS   | SAS          |
| FUJIFILM            | SOMALOGIC    |
| GE HEALTH           | VARIAN       |
| ILLUMINA            | ZEISS        |
| INSTITUT MERIEUX    | ZOETIS       |
| INTERSYSTEMS        |              |

# EFPIA Member Associations

## FULL MEMBERS

|   |   |   |
|---|---|---|
| <b>AUSTRIA</b><br>Fachverband der Chemischen Industrie Österreichs (FCIO)                                   | <b>IRELAND</b><br>Irish Pharmaceutical Healthcare Association (IPHA)  | <b>SPAIN</b><br>Asociación Nacional Empresarial de la Industria Farmacéutica (Farmaindustria)                       |
| <b>BELGIUM</b><br>Association Générale de l'Industrie du Médicament (pharma.be)                             | <b>ITALY</b><br>Associazione delle imprese del farmaco (Farmindustria)                                      | <b>SWEDEN</b><br>Läkemedelsindustriföreningen / The Swedish Association of the Pharmaceutical Industry (LIF/Sweden) |
| <b>DENMARK</b><br>Laegemiddelindustriforeningen The Danish Association of the Pharmaceutical Industry (LIF) | <b>NETHERLANDS</b><br>Vereniging Innovatieve Geneesmiddelen / Association Innovative Medicines              | <b>SWITZERLAND</b><br>Verband der forschenden pharmazeutischen Firmen der Schweiz (Interpharma)                     |
| <b>FINLAND</b><br>Lääketeollisuus ry / Pharma Industry Finland (PIF)  | <b>NORWAY</b><br>Legemiddelindustriforeningen / Norwegian Association of Pharmaceutical Manufacturers (LMI) | <b>TURKEY</b><br>Turkey Arastirmaci Ilac Firmalari Dernegi (AIFD)   |
| <b>FRANCE</b><br>Les Entreprises du Médicament (LEEM)   | <b>POLAND</b><br>Employers Union of Innovative Pharmaceutical Companies (Infarma)                           | <b>UNITED KINGDOM</b><br>The Association of the British Pharmaceutical Industry (ABPI)                              |
| <b>GERMANY</b><br>Verband Forschender Arzneimittelhersteller (VfA)  | <b>PORTUGAL</b><br>Associação Portuguesa da Indústria Farmacêutica (Apifarma)                               |   |
| <b>GREECE</b><br>Hellenic Association of Pharmaceutical Companies (SfEE)                                    | <b>RUSSIA</b><br>Association of International Pharmaceutical Manufacturers (AIPM)                           |   |

## AFFILIATE MEMBERS

|   |   |  |
|---|---|--|
| <b>BULGARIA</b><br>Association of the Research-based Pharmaceutical Manufacturers in Bulgaria (ARPharM) | <b>HUNGARY</b><br>Association of Innovative Pharmaceutical Manufacturers (AIPM)                   | <b>SERBIA</b><br>Innovative Drug Manufacturers' Association (INOVIA)                               |
| <b>CROATIA</b><br>Innovative Pharmaceutical Initiative (IFI)  | <b>LATVIA</b><br>Association of International Research-based Pharmaceutical Manufacturers (SIFFA) | <b>SLOVAKIA</b><br>Slovak Association of Innovative Pharmaceutical Industry (AIFP)                 |
| <b>CYPRUS</b><br>Cyprus Association of Pharmaceutical Companies (KEFEA)                                 | <b>LITHUANIA</b><br>The Innovative Pharmaceutical Industry Association (IFPA)                     | <b>SLOVENIA</b><br>Forum of International Research and Development Pharmaceutical Industries (EIG) |
| <b>CZECH REPUBLIC</b><br>Association of Innovative Pharmaceutical Industry (AIFP)                       | <b>MALTA</b><br>Malta Maltese Pharmaceutical Association (PRIMA)                                  | <b>UKRAINE</b><br>Association of Pharmaceutical Research and Development (APRaD)                   |
| <b>ESTONIA</b><br>Association of Pharmaceutical Manufacturers in Estonia (APME)                         | <b>ROMANIA</b><br>Association of International Medicines Manufacturers (ARPIM)                    |  |

## EFPIA Board Members\*

| PRESIDENT   | VICE-PRESIDENTS  |  |
|---|--|--|
| Joseph JIMENEZ (Novartis)   | Stefan OSCHMANN (Merck)  | Marc DE GARIDEL (Ipsen)  |
| Gitte AABO (LEO Pharma)<br>Carlos ALBAN (AbbVie)<br>Lucia ALEOTTI (Menarini)<br>Gabriel BAERTSCHI (Grünenthal)<br>Alberto CHIESI (Chiesi)<br>Joaquin DUATO (J&J)<br>Antoni ESTEVE (Esteve)<br>Jacqualyn FOUSE (Celgene) | Jorge GALLARDO (Almirall)<br>Murdo GORDON (BMS)<br>Peter GUENTER (Sanofi)<br>Allan HILLGROVE (Boehringer Ingelheim)<br>Tony HOOPER (Amgen)<br>Abbas HUSSAIN (GSK)<br>Olivier LAUREAU (Servier) | Daniel O'DAY (Roche)<br>Adam SCHECHTER (MSD)<br>Käre SCHULTZ (Lundbeck)<br>Jean-Christophe TELLIER (UCB)<br>Michel VOUNATSOS (Biogen)<br>Dieter WEINAND (Bayer)<br>John YOUNG (Pfizer)<br>Gianni ZAMPIERI (Vifor Pharma) |
| EX-OFFICIO  |  |  |
| Enrica GIORGETTI (Farmindustria)  |  |  |

## EFPIA Board Members (13 June 2017 - June 2019)

| PRESIDENT  | VICE-PRESIDENTS  |   |
|--|--|---|
| Stefan OSCHMANN (Merck)  | Jean-Christophe TELLIER (UCB)  | Olivier BRANDICOURT (Sanofi)  |
| Gitte AABO (LEO Pharma)<br>Carlos ALBAN (AbbVie)<br>Lucia ALEOTTI (Menarini)<br>Mark ALLES (Celgene)<br>Gabriel BAERTSCHI (Grünenthal)<br>Alberto CHIESI (Chiesi)<br>Mike DOUSTDAR (Novo Nordisk)<br>Frédéric DUCHESNE (Pierre Fabre)<br>Antoni ESTEVE (Esteve)<br>Jorge GALLARDO (Almirall) | Murdo GORDON (BMS)<br>Yoshihiko HATANAKA (Astellas)<br>Allan HILLGROVE (Boehringer Ingelheim)<br>Tony HOOPER (Amgen)<br>Paul HUDSON (Novartis)<br>Rob KOREMANS (Teva Pharmaceutical Europe)<br>Jean-Paul KRESS (Biogen)<br>Olivier LAUREAU (Servier)<br>David MEEK (Ipsen) | Luke MIELS (GSK)<br>Daniel O'DAY (Roche)<br>Giles PLATFORD (Takeda)<br>Antonio PORTELA (Bial)<br>Iskra REIC (AstraZeneca)<br>Adam SCHECHTER (MSD)<br>Kim STRATTON (Shire)<br>Dieter WEINAND (Bayer)<br>John YOUNG (Pfizer)<br>Alfonso ZULUETA (Eli Lilly) |
| EX-OFFICIO   |  |   |
| Birgit FISCHER (vfa)   | Enrica GIORGETTI (Farmindustria)   |   |

\* UNTIL 13 JUNE 2017

## EFPIA Specialised Groups

European Biopharmaceutical Enterprises (EBE) represents the voice of biopharmaceutical companies of all sizes in Europe and is a specialised group within EFPIA. Established in 2000, EBE is recognised as the leading biopharmaceutical association in Europe.

### EBE MEMBERS

|  |                                |                          |
|--|--------------------------------|--------------------------|
| ABBVIE BIOPHARMACEUTICALS SARL           | ELI LILLY SA                   | NETSCIENTIFIC            |
| AC IMMUNE SA                             | ENTASIS THERAPEUTICS           | NOVARTIS                 |
| ACHAOGEN                                 | ENYO PHARMA                    | NOVIMMUNE SA             |
| ACTELION PHARMACEUTICALS LTD.            | F. HOFFMANN-LA ROCHE LTD       | NOVO NORDISK A/S         |
| AICURIS GMBH & CO. KG                    | GENESIS PHARMA                 | ORPHAN EUROPE            |
| ALK-ABELLÓ A/S                           | GENFIT SA                      | PHARMA MAR SA            |
| AMGEN LIMITED                            | GENOMIC HEALTH                 | PREGLEM                  |
| BASILEA PHARMACEUTICA INTERNATIONAL LTD. | GENZYME EUROPE BV*             | SANOFI-AVENTIS GROUPE    |
| BAYER                                    | GLAXO SMITH KLINE              | SHIRE (EX BAXALTA)*      |
| ROXALL MEDICINA ESPANA S.A.              | HRA PHARMA                     | SPERO THERAPEUTICS       |
| FARMACEUTICA SA                          | INTREXON ANTIBIOTICS           | STALLERGENES-GREER       |
| BIO DEUTSCHLAND E.V.                     | IPSEN PHARMA SAS               | SYMPHOGEN                |
| BIOGEN INTERNATIONAL                     | IXALTIS                        | SYNTHON                  |
| BIOPHYTIS SA                             | JANSSEN PHARMACEUTICA NV       | TIGENIX NV               |
| BOEHRINGER INGELHEIM GMBH                | LABORATORIOS LETI S.L.U.       | TRANSGENE                |
| CHIESI FARMACEUTICI S.P.A.               | LFB SA                         | UCB BIOPHARMA SPRL       |
| CLOVIS ONCOLOGY UK LTD**                 | LYSOGENE                       | UNIQUEURE BIOPHARMA B.V. |
| CUREVAC AG                               | MEDIMMUNE (EQUALS ASTRAZENECA) | VAXEAL HOLDING SA        |
| DA VOLTERRA                              | MERCK                          | VISCOFAN SA              |
| DOMPÉ SPA                                | MERCK SHARP & DOHME INC.       | ZYMENEX A/S              |
|  | MYRIAD GENETICS GMBH**         |                          |

**Vaccines Europe (VE)** is the specialised vaccine industry group within EFPIA. It represents major innovative research-based global vaccine companies as well as small and medium sized enterprises operating in Europe.

### VACCINES EUROPE MEMBERS

|                              |                   |         |
|------------------------------|-------------------|---------|
| ABBOTT PRODUCT OPERATIONS AG | IMMUNOBIOLOGY LTD | SEQIRUS |
| ASTRAZENECA                  | MSD               | TAKEDA  |
| CUREVAC                      | NOVAVAX           | VAXEAL  |
| JANSSEN                      | PFIZER VACCINES   |         |
| GLAXOSMITHKLINE VACCINES     | SANOFI PASTEUR    |         |

\* WILL LEAVE EBE ON 31 JUNE 2017

\*\* WILL LEAVE EBE ON 31 DECEMBER 2017



# EFPIA Staff

## GENERAL MANAGEMENT TEAM

|   |   |
|---|---|
| Director General Nathalie Moll                | Chief of Staff Christine Berwaerts        |
| Deputy Director General Marie-Claire Pickaert | PA to the Director General Maria Curatolo |

## COMMUNICATION AND PARTNERSHIPS TEAM

|  |   |
|--|---|
| Director of Communications Andy Powrie-Smith | Communications Manager - External Affairs Faraz Kermani |
| Communications Manager Zsófia Bakonyi        | Digital Communications Manager Giulia Biasi             |

## EUROPEAN BIOPHARMACEUTICAL ENTERPRISES (EBE)

|                                      |   |
|--------------------------------------|---|
| Executive Director Barbara Freischem | Office Manager Livia Le Metayer             |
| Public Affairs Manager Audrey Wolf   | Regulatory Affairs Manager Véronique Debaut |

## GOVERNMENT AFFAIRS

|   |   |
|---|---|
| Director Government Affairs Gabriella Almberg | Manager Government Affairs Ioana Enache |
| Director European Affairs Elizabeth Kuiper    | Manager Angela Piedra-Hernandez         |

## STRATEGY AND HEALTHCARE SYSTEMS

|  |   |
|--|---|
| Director Strategy and Healthcare Systems Thomas Allvin | Manager Economic Analysis and Policy Ludivine Blanc |
| Senior Manager, Strategic Research Claire Machin       | Administrative Assistant Amelia Kossi               |

## LEGAL AFFAIRS AND COMPLIANCE

|   |                                       |
|---|---------------------------------------|
| Deputy Director General Marie-Claire Pickaert             | e4ethic Project Manager Versina Bregu |
| Deputy Director Legal Affairs & Compliance Julie Bonhomme |                                       |

## MARKET ACCESS

|   |   |
|---|---|
| Director Market Access François Bouvy   | Senior Manager, Country Support François Lamérant |
| Director Market Access/HTA Edith Frénoy |   |

## OFFICE MANAGEMENT

|                                      |                         |
|--------------------------------------|-------------------------|
| IT Manager Stéphane De Molling       | Receptionist Pina Avola |
| Accounts Assistant Nathalie Bernardo |                         |

## REGULATORY AFFAIRS

|   |   |
|---|---|
| Director Regulatory Affairs Pär Tellner | Manager Regulatory Affairs Tiia Metiäinen |
| Director Regulatory Affairs Sini Eskola | Assistant Manager Sandra Rodrigues        |

## SCIENCE POLICY

|  |   |
|--|---|
| Director Science Policy Magda Chlebus              | Manager Science Policy Anna Szczepanska |
| Senior Manager Research partnerships Nicolas Creff | Assistant Manager Tatiana Kirpitchenok  |

## TRADE AND IP

|  |  |
|--|--|
| Director Trade Policy Maria Trallero                           | Manager, Trade Policy Réka Szántó                          |
| Director, Data Protection, IP and Global Health Brendan Barnes | Assistant Manager, IP and Data Protection Valentine Kandel |
| Director Intellectual Property Policy Elise Melon              | Administrative Assistant Fabienne Muylle                   |
| Deputy Director, Trade Policy Jana Nackberg                    |  |

## VACCINES EUROPE (VE)

|   |   |
|---|---|
| Executive Director Magdalena Rodriguez de Azero | Assistant Manager Andrija Visic         |
| Senior Manager Anna Czwarno                     | Administrative Assistant Anne Meynaerts |



European Federation of Pharmaceutical  
Industries and Associations

**EFPIA represents the pharmaceutical industry in Europe.**

Through its direct membership of 33 national associations and 40 leading pharmaceutical companies, EFPIA provides the voice of 1,900 companies committed to researching, developing and bringing new medicines to improve health and quality of life around the world.



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