Unlocking tomorrow’s cures
# Table of contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>3</td>
</tr>
<tr>
<td>Foreword</td>
<td>4</td>
</tr>
<tr>
<td>About EFPIA</td>
<td>5</td>
</tr>
<tr>
<td>EFPIA Activity 2016</td>
<td>6</td>
</tr>
<tr>
<td>Innovation in numbers</td>
<td>7</td>
</tr>
<tr>
<td>The impact of medicines</td>
<td>10</td>
</tr>
<tr>
<td>The economic impact of the industry</td>
<td>13</td>
</tr>
<tr>
<td>EFPIA Governance</td>
<td>15</td>
</tr>
</tbody>
</table>
Introduction

An age of innovation, challenges and opportunities

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

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.
Foreword by the President

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.

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
EFPIA President
CEO Novartis
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.
EFPIA Activity 2016

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.

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 DATA
The Data Protection Regulation was adopted and contains 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
EFPIA Clinical Trials and Transparency priority working group coordinated the launch of a comprehensive survey jointly with PNRMA on the membership implementation of Principles of Responsible Clinical Data Sharing.

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 (HURD). EFPIA coordinated a joint industry presentation with AESGP and Medicines for Europe, which highlighted key regulatory issues in India.

REGULATORY AFFAIRS

PATIENT ACCESS PARTNERSHIP (PACT)
EFPIA as member of the PACT Steering Committee helped organise the MEP interest group on access to healthcare.

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.

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 IM 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.

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

ANIMAL WELFARE
EFPIA's published a White Paper on 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

- First anti-angiogenic medicine for cancer
- New Rx for most common form of lung cancer
- First vaccine for the prevention of cervical cancer
- First Rx for chronic chest pain in 20 years
- First once-a-day HIV medicine
- A new type of treatment for Crohn’s disease
- The first Rx for symptoms of Huntington’s disease
- 2 new multiple sclerosis drugs
- First therapeutic cancer vaccine
- First drug to target root cause of cystic fibrosis
- First drug to treat Cushing’s disease
- Oral treatment for HepC provides cure rates upwards of 90%
- 17 new drugs to treat patients with rare diseases
- 7000 medicines in development around the world
- First new kidney cancer Rx in over a decade
- 3 new therapies for diabetes
- New class of medicines to treat high blood pressure
- First treatment for fibromyalgia
- First treatment for peripheral T-cell lymphoma
- First new Rx for gout in 40 years
- First lupus drug in 50 years
- 2 new personalised medicines
- First Immuno- oncology for metastatic melanoma
- A new oral treatment for multiple sclerosis
- 2 new personalised medicines to treat the most dangerous forms of skin cancer
- 2 new drugs for difficult-to-treat forms of high cholesterol
- New cystic fibrosis drug for patients with a genetic mutation that is the most common cause of the disease

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.

1,813 CANCERS
599 CARDIOVASCULAR DISORDERS
475 DIABETES
159 HIV/AIDS
1,120 IMMUNOLOGICAL DISORDERS
1,256 INFECTIOUS DISEASES
511 MENTAL HEALTH DISORDERS
1,329 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.

81 New active substances recommended for approval by EMA in 2016

Approximately 4,000 clinical trials are authorised each year in the EEA.

1,270 vaccines clinical trials were conducted in Europe (from 2010 to 2015).

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

US
EU
JAPAN

3http://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**

- **15.0%** Pharmaceuticals and biotechnology
- **10.6%** Software and computer services
- **8.4%** Technology hardware and equipment
- **5.9%** Automobiles & parts
- **2.9%** Chemicals
- **2.8%** Aerospace & defence

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

**11% rise**

2015 R&D investment at European biotechnology companies rose 11% compared to 2014.

**€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.

**€442.3 million**

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

**84**

While 11 IMI projects successfully came to term, grant agreements were signed for 14 new IMI2 projects for a total budget of €269 million.

**14**

14 projects have started in 2016, including BD4BO projects, vaccines, safety and patient engagement in benefit risk evaluation.

**IMI STAKEHOLDERS FORUM**

Forum with consultations on emerging infections, advanced therapeutics, oncology, and digital health.

**IMI Timeline 2016**

- **IMI CALL 9**
  - Launch of 6 topics addressing antimicrobial resistance, flu vaccines, efficiency, data quality, big data exploitation, liver diseases and rheumatic diseases.

- **IMI ETRIKS**
  - Project session at the European Parliament to showcase reuse of data.

- **CALL 16**
  - Launch of 8 topics addressing outcomes in CVD and prostate cancer, paediatric clinical trials infrastructure, treatment of chronic and acute pain, bio-manufacturing and patient engagement in R&D, and new treatment pathways in autism.

- **PROJECTS**
  - 14 projects have started in 2016, including BD4BO projects, vaccines, safety and patient engagement in benefit risk evaluation.

**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.

The impact of medicines

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

- 95% of the 15 million patients in Europe living with Hepatitis C can be cured through an 8-12 week course of treatment.
- Since 1991 there has been a 94% reduction in age-standardised death rates for patients living with HIV in France.
- Between 2000 and 2012, the death rate from Cardiovascular Disease fell 37% in the EU5.
- Between 2000 and 2012, new therapies contributed to a 48% and 31% decline in the Diabetes death rate in Korea and Canada respectively.
- Since 1991 there has been a 21% reduction in mortality rates from all Cancers.

Hepatitis C (HCV)

- 15 million people are living with Hepatitis C in Europe.
- +133% cure rate increase for patients between 1999 and 2015.
- Over 90% Hepatitis C is now curable in over 90% of treated patients with only 8-12 weeks of treatment.

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

- -94% FRANCE
- -92% SPAIN
- 172 New PCSK9 Inhibitors have revolutionised therapy for high cholesterol. Between 2000 and 2012, the death rate from cardiovascular disease fell 37% in the EU5.

For European patients diagnosed in 2012, over 66,000 more will live for at least five years after diagnosis, compared with if they had been diagnosed a decade earlier.

CANCER

- +66,000

In Europe, biopharmaceutical companies are currently developing 172 medicines to treat heart disease, stroke and other cardiovascular diseases.
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 worldwide⁹

Vaccination protects patients with chronic diseases. Influenza vaccination reduces by¹⁰

-24% The risk of strokes after respiratory disease

-50% Heart attack occurance

-28% Death in diabetic patient

Vaccination helps fight against antimicrobial resistance (AMR)

The use of pneumococcal vaccine in France has reduced the use of antibiotics¹¹

48% 29%

25,000 lives spared per year

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


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.

**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.
- ~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.

**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.

**Cell therapy** – insertion of living cells into patients to replace or repair damaged tissue, in order to facilitate improved organ or tissue functionality.

- ~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.
- €17 billion is the current social care costs for Alzheimer’s in Europe; new treatments may result in substantial savings.

**Alzheimer’s treatments** – seek to breakdown or inhibit the formation of protein plaques, helping to delay the onset and progression of Alzheimer’s disease.

* 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

The pharmaceutical industry employs some 745,000 people directly in Europe

Biotech companies employed 72,160 people in Europe in 2015\textsuperscript{13}, +18% compared to 2014

Total worldwide employees of Vaccines Europe members in 2014

- 45% Europe
- 35% North America
- 12% Rest of the World
- 8% Asia

Source: EFPIA member associations (official figures) - Int. EFPIA estimate
The economic impact of the industry

Driving employment in Europe

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.

Europe is a long-standing leader in vaccines

Doses of vaccines produced by Vaccines Europe members by region in 2014, across 23 production sites:
- 80% Europe
- 11% North America
- 5% Asia
- 4% Rest of the World

86% of the vaccines produced in the EU by Vaccines Europe members are exported worldwide.
EFPIA Members

EFPIA Member Associations

FULL MEMBERS

AUSTRIA
Fachverband der Chemischen Industrie Österreichs (FCIO)

BELGIUM
Association Générale de l'Industrie du Médicament (pharma.be)

DENMARK
Laegemiddelindustriforeningene

FINLAND
Lääketeollisuus ry / Pharma Industry Finland (PfIF)

FRANCE
Les Entreprises du Médicament (LEEM)

GERMANY
Verband Forschender Arzneimittelhersteller (VfA)

GREECE
Hellenic Association of Pharmaceutical Companies (SfEE)

IRELAND
Irish Pharmaceutical Healthcare Association (IPHA)

ITALY
Associazione delle imprese del farmaco (Farmindustria)

NETHERLANDS
Vereniging Innovatieve Geneesmiddelen / Association Innovative Medicines

NORWAY
Legemiddelindustriforeningen / Norwegian Association of Pharmaceutical Manufacturers (LIMI)

PORTUGAL
Associação Portuguesa da Indústria Farmacêutica (Apifarma)

RUSSIA
Association of International Pharmaceutical Manufacturers (AIPM)

SPAIN
Asociación Nacional Empresarial de la Industria Farmacéutica (Farmindustria)

SWEDEN
Läkemedelsindustriföreningarna / The Swedish Association of the Pharmaceutical Industry (LIF/Sweden)

SWITZERLAND
Verband der forschenden pharmazeutischen Firmen der Schweiz (Interpharma)

TURKEY
Türkiye Arastırmacı İlaç Firmaları Demegi (AIFD)

UNITED KINGDOM
The Association of the British Pharmaceutical Industry (ABPI)

AFFILIATE MEMBERS

BULGARIA
Association of the Research-based Pharmaceutical Manufacturers in Bulgaria (ARPPhAR)

CROATIA
Innovative Pharmaceutical Initiative (IFI)

CYPRUS
Cyprus Association of Pharmaceutical Companies (KEFEA)

CZECH REPUBLIC
Association of Innovative Pharmaceutical Industry (AIPF)

ESTONIA
Association of Pharmaceutical Manufacturers in Estonia (APME)

HUNGARY
Association of Innovative Pharmaceutical Manufacturers (AIPM)

LATVIA
Association of International Research-based Pharmaceutical Manufacturers (SiFA)

LITHUANIA
The Innovative Pharmaceutical Industry Association (IFPA)

MALTA
Malta Maltese Pharmaceutical Association (PRIMA)

ROMANIA
Association of International Medicines Manufactures (ARPM)

SERBIA
Innovative Drug Manufacturers’ Association (INOVIA)

SLOVAKIA
Slovak Association of Innovative Pharmaceutical Industry (AIPF)

SLOVENIA
Forum of International Research and Development Pharmaceutical Industries (EIG)

UKRAINE
Association of Pharmaceutical Research and Development (APRaD)

ALCEDIAG
BRUKER
CLARIVATE ANALYTICS
COVAANCE
DETECOM
DEXCOM
ELLEGARD MINIPIGS
FUJIFILM
GE HEALTH
ILLUMINA
INSTITUT MERIEUX
INTERSYSTEMS

MEDTRONIC
NOKIA
PIRAMAL
PMB ALCEN
PSYCHOCGENICS
QUINTILES
SAS
SOMALOGIC
VARIAN
ZEISS
ZOETIS

EFPIA Members
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**

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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 | PIZZER VACCINES | SANOFI PASTEUR |
| GLAXOSMITHKLINE VACCINES | | |

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* Until 13 June 2017

** Will leave EBE on 31 December 2017

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EFPIA Specialised Groups
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<th>EFPIA Staff</th>
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### GENERAL MANAGEMENT TEAM
- **Director General** Nathalie Moll
- **Deputy Director General** Marie-Claire Pickaert
- **Chief of Staff** Christine Berwaerts
- **PA to the Director General** Maria Curatolo

### OFFICE MANAGEMENT
- **IT Manager** Stéphane De Molling
- **Accounts Assistant** Nathalie Bernardo
- **Receptionist** Pina Avola

### MARKET ACCESS
- **Director Market Access** François Bouvy
- **Director Market Access/HTA** Edith Frénoy
- **Senior Manager, Country Support** François Lamérant

### COMMUNICATION AND PARTNERSHIPS TEAM
- **Director of Communications** Andy Powrie-Smith
- **Communications Manager** Zsófia Bakonyi
- **Communications Manager - External Affairs** Faraz Kermani
- **Digital Communications Manager** Giulia BIASI

### EUROPEAN BIOPHARMACEUTICAL ENTERPRISES (EBE)
- **Executive Director** Barbara Freischem
- **Public Affairs Manager** Audrey Wolf
- **Office Manager** Livia Le Metayer
- **Regulatory Affairs Manager** Véronique Debaut

### GOVERNMENT AFFAIRS
- **Director Government Affairs** Gabriella Almberg
- **Director European Affairs** Elizabeth Kuiper
- **Manager Government Affairs** Ioana Enache
- **Manager** Angela Piedra-Hernandez

### REGULATORY AFFAIRS
- **Director Regulatory Affairs** Pär Tellner
- **Manager Regulatory Affairs** Tia Metäinen
- **Assistant Manager** Sandra Rodrigues

### SCIENCE POLICY
- **Director Science Policy** Magda Chlebus
- **Senior Manager Research partnerships** Nicolas Creff
- **Manager Science Policy** Anna Szczepanska
- **Assistant Manager** Tatiana Kirpitchenok

### STRATEGY AND HEALTHCARE SYSTEMS
- **Director Strategy and Healthcare Systems** Thomas Alvin
- **Senior Manager, Strategic Research** Claire Machin
- **Manager Economic Analysis and Policy** Lüdivine Blanc
- **Administrative Assistant** Amelia Kossi

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

### LEGAL AFFAIRS AND COMPLIANCE
- **Deputy Director General** Marie-Claire Pickaert
- **Deputy Director Legal Affairs & Compliance** Julie Bonhomme
- **e4ethic Project Manager** Versina Bregu

### VACCINES EUROPE (VE)
- **Executive Director** Magdalena Rodriguez de Azero
- **Senior Manager** Anna Czwarno
- **Assistant Manager** Andrija Vasic
- **Administrative Assistant** Anne Meynaerts
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.