



interpharma^{ph} 2019

INTERPHARMA ANNUAL REPORT 2019

EDITORIAL



Jörg-Michael Rupp

President of Interpharma & Director Pharma International, Roche

Healthcare is at a turning point; medical knowledge is growing exponentially, and advances in technology mean we can identify diseases earlier and treat them more effectively than ever before. The pharmaceutical industry has played a key role in these advances; it has invested heavily in research to improve our understanding of disease and has developed new medicines that have positively changed the prospects for many patients around the world. As we enter the new decade, it is clear that change is just around the corner. Growing populations, higher life expectancy and an increase in chronic diseases mean that the demand for healthcare continues to grow. A development that today's healthcare system is finding it difficult to keep pace with. Digitalization and Big Data will play a crucial role in meeting these challenges – enabling us to deliver better results and more efficient systems. We believe that Switzerland has the opportunity to play a key role in this new healthcare paradigm, with great benefits for patients and the general public.

Our report 'Switzerland as a pharmaceutical location in 2030' examines how the various players in the healthcare system can work together. Together we can build on the strong foundations of the country's pharmaceutical industry and become a pioneering research and development center for digital healthcare. As a country and as a population, we can be proud of the difference we can make to the lives of so many people. We look forward to continuing this work with all partners in the next decade and beyond.



Dr. René Buholzer
CEO, Interpharma

Alongside climate change, one of the key issues discussed by politicians and the media during last year's elections was healthcare costs. According to the 2019 Swiss "Worry Barometer" survey, the country's population regards healthcare costs as the biggest problem after old-age pensions. At the same time, according to the health monitor survey conducted by gfs for Interpharma, people are becoming less willing to forgo services and are unwilling to accept experiments that could reduce the quality of the healthcare system. With many of the political challenges currently under discussion, it is important to carefully weigh up what their medium- to long-term consequences will be for the entire healthcare system. Simple cost-curbing measures that reduce quality or lead to a deterioration in security of supply are not expedient. Instead, the efficiency and quality of our health care system must be sustainably increased. The pharmaceutical industry makes an important contribution to this process at two levels. Firstly, the reductions in medicine prices that have occurred regularly since 2012 have saved more than one billion Swiss francs in healthcare costs. Secondly, Interpharma joined forces with important stakeholders during 2019 on a large number of projects and initiatives – for example within the framework of *santeneXt* – to overcome the challenges in a sustainable fashion. It did so because these challenges require a strategy that is shared by all stakeholder groups.

Pharma hub Switzerland needs to face up to other, growing challenges. The attractive environment that the country offers and the innovativeness of its pharmaceutical industry have been drivers of its prosperity and quality of life for decades, in addition to creating major patient benefits. However, Switzerland is increasingly losing ground to other countries in terms of competitiveness. An optimal operating environment is essential if the country is to remain a successful and internationally competitive pharma hub. With the "Pharma hub Switzerland 2030" strategy that has been developed over the course of several months with the Interpharma committees, Interpharma is relaunching the discussion on Switzerland's future as a centre of pharmaceutical activity. The report covers three thematic areas: "patients and their environment", "Switzerland as a centre of research activity" and "the economic policy framework". The main points of leverage will be identified for each, and the report will highlight the contributions required from the industry, government and the authorities to ensure a successful future.

One of the pharmaceutical industry's most important priorities is to combat disease by developing new and innovative medicinal products and to make these medicines available to patients as quickly as possible. The growing number of more effective medicines is good news for patients. However, this development also represents a genuine challenge for authorities, hospitals, doctors, health insurers and the pharmaceutical industry, as well as our pricing system. Novel medicines and treatments such as gene therapy, cell therapy, immunotherapy, etc., are stretching the otherwise tried-and-tested pricing system to its limits. Unfortunately, there are growing delays in reimbursing the cost of innovative medicines in particular. In the interests of patient benefits, Interpharma has drawn up a proposal that provides accelerated access to innovations that fulfil urgent medical needs in addition to the standard process. Interpharma is in discussions on the subject with the FOPH and all significant players. The aim is to ensure that patients in Switzerland not only have faster access to innovative medicines, but are also reimbursed from the day those medicines are approved. After all, new, more effective medicines and treatments not only benefit patients and their families, but also take the pressure off employers and social insurance schemes.

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CORE TOPICS

Pharma hub Switzerland 2030

A strong industry in a challenging environment

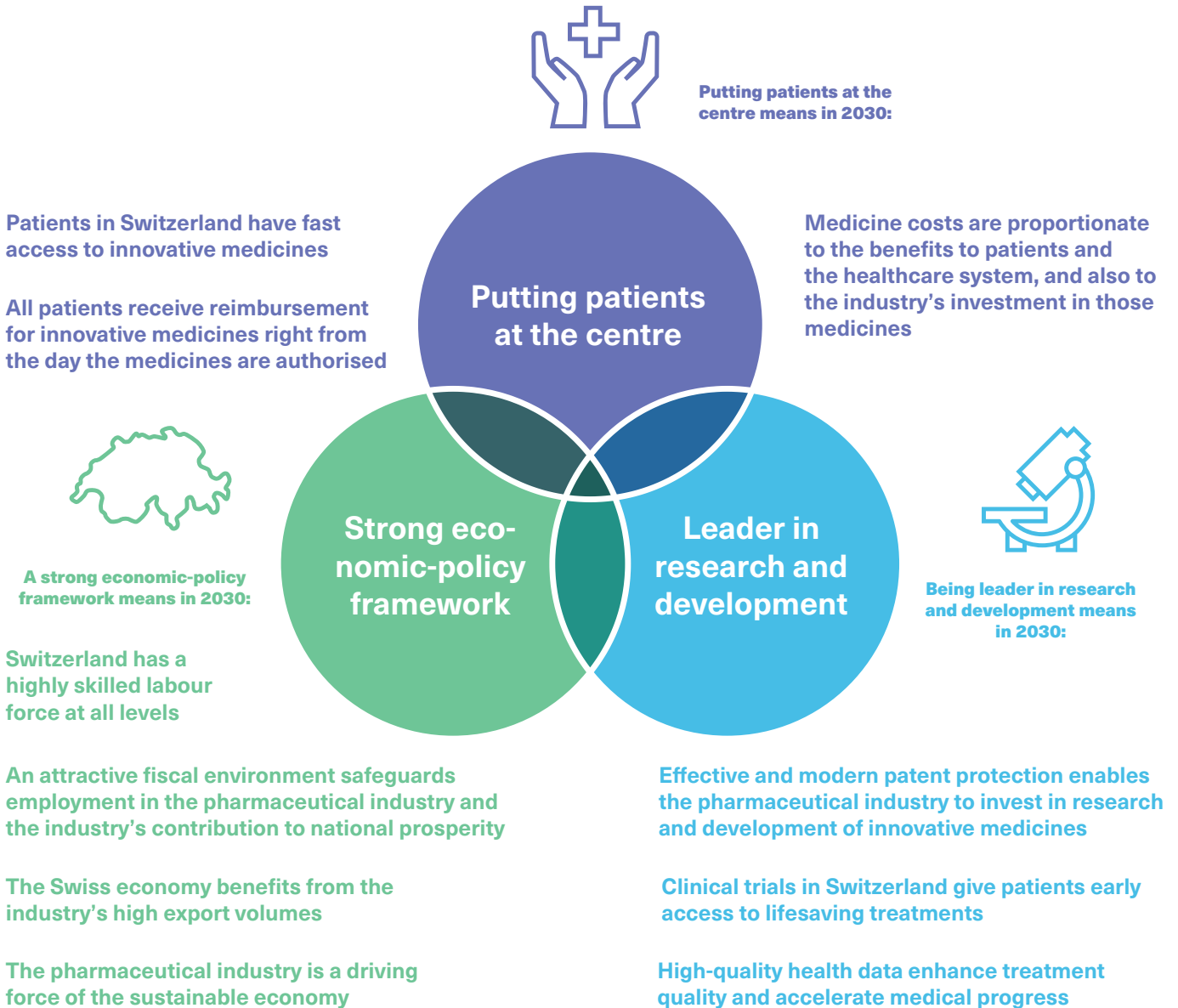
In 2030, Switzerland will be a leading pharma hub benefiting from high-quality, sustainably funded medical innovations and the pharmaceutical industry's contribution to prosperity and quality of life. In a strategy report unveiled in December 2019, Interpharma outlines a vision and the measures needed to achieve it grouped into three thematic blocks: 'Putting patients at the centre', 'Leader in research and development' and 'Strong economic-policy framework'.

Accelerating access to innovative medicines

Patients, society and the economy will still be enjoying the benefits of innovative medicinal products in 2030. To ensure that new medicines are authorised as a priority and by using fast-track procedures, Swissmedic will have to create a reputation for itself internationally as an autonomous agency with strong competencies in innovations. In the future, patients should have access to innovative medicines from the day they are authorised by Swissmedic. Flexibilised pricing and tariff-setting by the Federal Office of Public Health (FOPH) will create incentives to improve the efficiency of the healthcare system while safeguarding the long-term financing of innovative treatments.

Vision for Switzerland as a pharma hub in 2030

“Switzerland is still Europe’s leading pharma hub in 2030. It benefits from high-quality medical innovation and is able to fund this innovation in the long run and sustainably. The pharmaceutical industry is a key contributor to the prosperity and quality of life of people in Switzerland.”



Leader in research and development in the digital age

Research and development are essential for a country like Switzerland, which has few natural resources. An effective and modern system of protecting intellectual property is essential if Switzerland is to remain a thriving centre of research activity, as is an operating environment that is conducive to research and development in the country. Digitalisation will fundamentally change the way medicines are developed and used. In terms of Switzerland as a location, it is important to create a globally leading, integrated health data ecosystem comprising Swiss data and access to foreign data. At a global level, health data transfer from around the world to Switzerland and vice versa must be guaranteed by ensuring equivalent data protection. Adequate protection must be available for the data, algorithms and results of data analysis that give rise to innovative treatments. Finally, but nevertheless importantly, the framework under which clinical research is carried out in Switzerland needs improvement. This will be necessary to stop the decline in the number of clinical trials conducted in Switzerland and return it to an upwards trajectory for the benefit of patients and the research location.

Strong economic-policy framework as a global competitive advantage

Political stability and legal certainty are traditional Swiss strengths. Over the last few years, however, there has been a process of erosion that is now being reflected in the relevant international indexes. Switzerland is

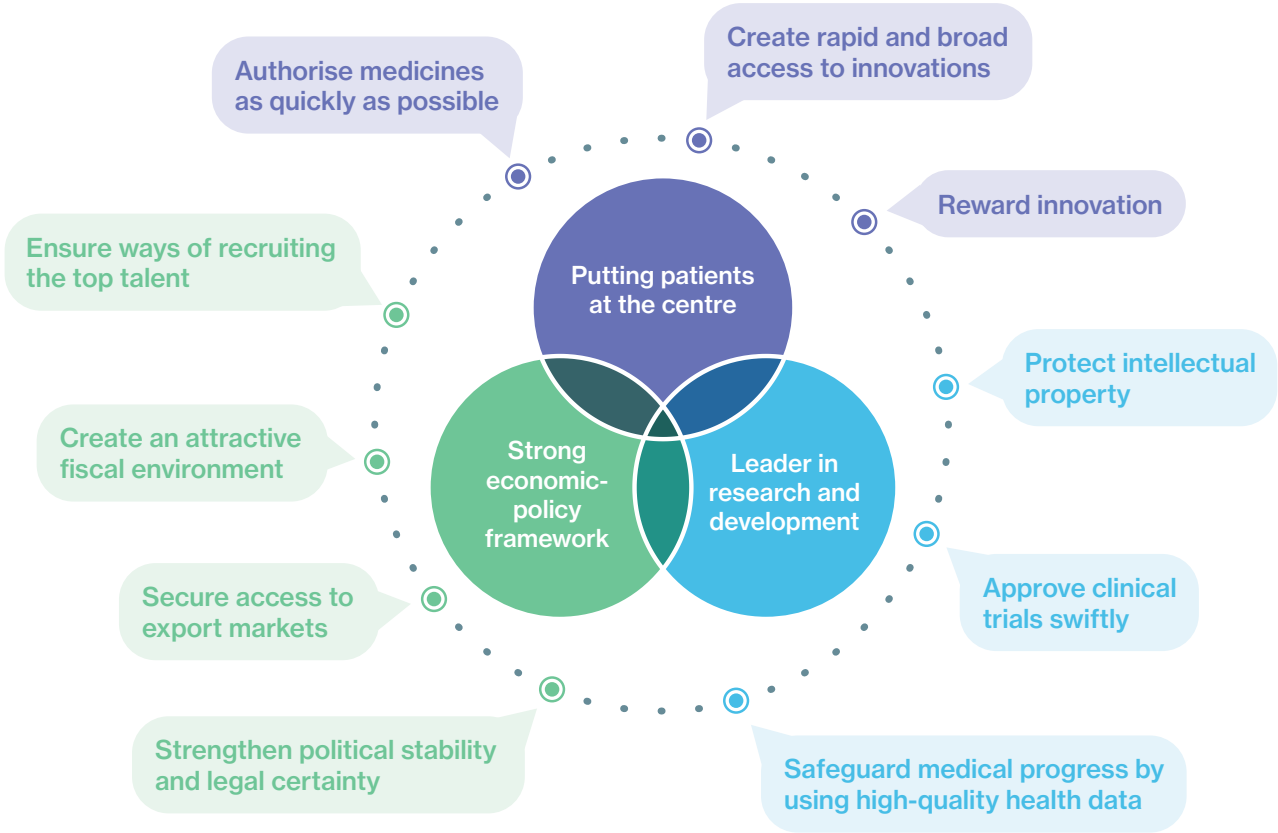


well placed against other countries in terms of quality of education, not least because of its dual education system and the strong international links and outlook of its universities. This needs to be preserved and strengthened. Ensuring continued access to top-quality foreign subject specialists by safeguarding the free movement of people will remain a key factor for Switzerland as a pharma location. Similarly, Switzerland will need to maintain its position in international fiscal competition while simultaneously safeguarding

and developing orderly and stable trade relations with the EU and other important export markets.

The report, which is available in German, French and English, can be downloaded from www.interpharma.ch.

The 10 key areas that will ensure a strong pharmaceutical industry in 2030



Start of roll-out of 'Pharma hub Switzerland 2030' report



Activities linked to the “Pharma hub 2030” strategy report kicked off with a media conference on 6 December 2019. Jörg-Michael Rupp, Vice-President, Pharma International, Roche and President of Interpharma, Matthias Leuenberger, Country President Novartis Switzerland and Member of the Interpharma Board, Nicholas Franco, Executive VP and CBDO at Actelion, a Janssen Pharmaceuticals Company of Johnson & Johnson, and designated Member of the Interpharma Board, and René Buholzer, CEO of Interpharma, explained the three thematic blocks and associated measures to media representatives, and spoke about the industry’s contribution to strengthening Switzerland as a location. The media coverage following the launch focused on the delay in giving patients access to innovations.

The strategy report was sent to all relevant stakeholders in the healthcare system. In addition, initial discussions were held with important partners in the healthcare system, authorities and government. These will be intensified during 2020 and accompanied by a series of communication activities.





CORE TOPICS

Pharma, production and research hub Switzerland

Swiss-EU relations:

Access to our key export market must be quickly secured and sustained in the long term

In 2019, Switzerland exported products with a value of around 125 billion Swiss francs to the EU. This makes the EU the biggest market for the country as a whole and for the pharmaceutical industry in particular. With exports of almost 98 billion francs – almost half of which go to the EU – the research-based pharmaceutical industry exports 25 times as much as it sells in Switzerland. The pharmaceutical industry is therefore reliant on free access to the European single market.

As the representative of Switzerland's biggest exporting industry, Interpharma is supporting the Federal Council in its efforts to maintain a

bilateral route. To further expand market access and prevent the erosion of the existing market access agreements, Interpharma regards it as essential to quickly resolve outstanding issues and have the Federal Council sign the institutional agreement (InstA) with the EU soon. Interpharma affirmed this stance in a letter to the entire Federal Council in May 2019, and demanded that an institutional agreement be signed quickly. Even before it sent its letter, Interpharma took part in a top-level economists’ hearing on the subject of the bilateral agreements, something that generated considerable interest and remained engaged in the alliance stark+vernetzt.

European monitor

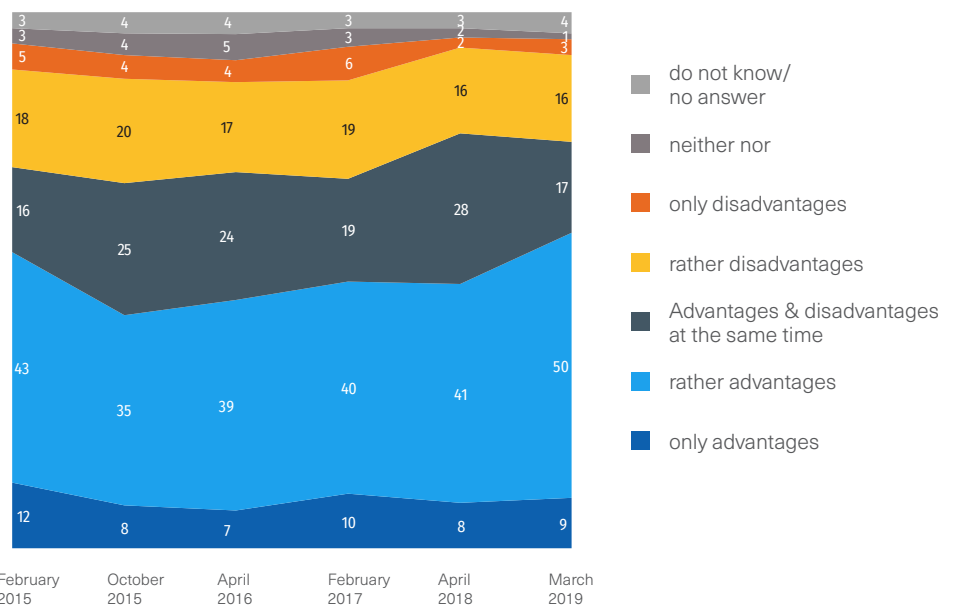


According to a representative survey carried out for Interpharma by the gfs.bern research institute in March 2019, 60% of people eligible to vote in Switzerland supported the draft of an institutional agreement with the EU. General opinion on the bilateral agreements was more positive than in previous years. People feel there is a clear link between stable relations with the EU and prosperity in Switzerland.

Trend assessment bilateral contracts

“In general: Do you see more advantages or more disadvantages in the bilateral agreements between Switzerland and the EU? Please tell me if you see only advantages, rather advantages, rather disadvantages or only disadvantages.”

in % of people with voting rights

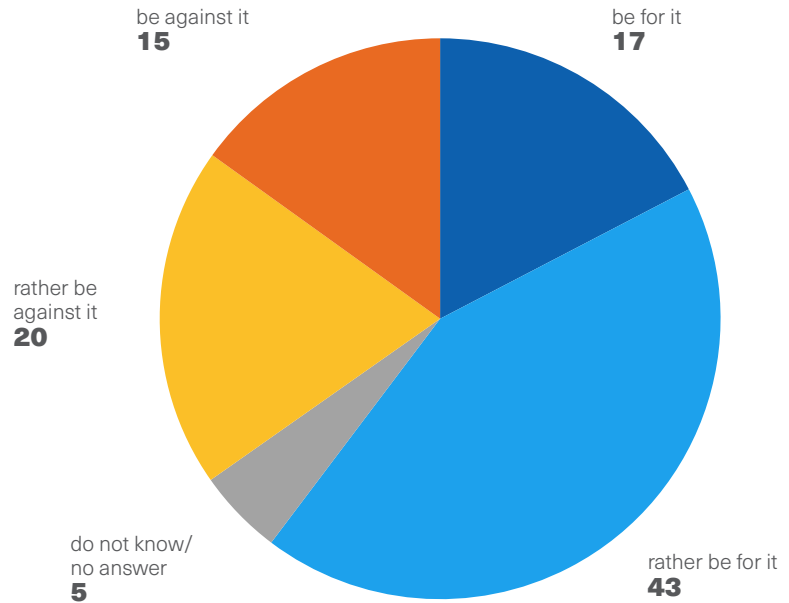


Source: gfs.bern, Location Switzerland, 6th wave, Feb/March 2019 (n in each case approx. 2400)

Voting intention institutional agreement Switzerland-EU

“If such an institutional agreement between Switzerland and the EU were to be put to vote, would you then vote for it, rather for it, rather against it or definitely against it?”

in % of people with voting rights, who definitely intend to vote



Source: gfs.bern, Location Switzerland, 6th wave, Feb/March 2019 (n = 1123)

Regional events in Aarau and Geneva



An evening event jointly organised by Aargau Chamber of Commerce and Industry, stark+vernetzt and Interpharma was held in Aarau on 19 August. Representatives of trade, industry, science and politics discussed the framework conditions necessary for a successful location and the interaction between large and small companies with attendees. Matthias Leuenberger, Country President Novartis Switzerland, gave a talk on the economic importance of the pharmaceutical industry in the Canton of Aargau. The event, which was attended by about 100 people, was rounded off by a review of the “Start up Kids” pilot project.

In October 2019, Interpharma organised an event in Geneva to highlight the benefits of bilateral agreements in partnership with economiesuisse and HEG Geneva School of Business Administration. About a hundred people attended the event, including a class of students from the School of Business Administration, who had the opportunity to ask questions to the speakers.



Brexit

Further strengthen economic relations with the UK



Economically, politically and in terms of migration, the United Kingdom is an important partner for Switzerland. Current Swiss-UK relations are based heavily on Switzerland's bilateral agreements with the European Union (EU), which will no longer apply to the United Kingdom as of the end of the transition period that follows its departure from the EU. In its relations with the UK, Switzerland wants to safeguard existing reciprocal rights and obligations wherever possible after the UK's departure and possibly even expand on them ("mind the gap" strategy). By adopting this approach, the Federal Council is pursuing a carefully thought-out strategy that should ensure barrier-free access to an important trading partner of the pharmaceutical industry.

From the industry's perspective, mutual recognition of conformity assessments is a key issue. The trade agreement that has been signed already covers areas of importance to the industry, such as Good Laboratory Practice (GLP) or Good Manufacturing Practice (GMP) inspections for medicinal products and batch certification. As regards the remaining chapters of the Mutual Recognition Agreement (MRA), the primary goal must be to sign a "traditional MRA" so as to avoid duplication of conformity assessments.

Interpharma is confident that further negotiations on the remaining chapters of the MRA will reflect Switzerland's needs as a business and research location and that it will be possible to maintain and strengthen economic ties with the United Kingdom.

Federal Act on Tax Reform and AHV Financing (TRAF)

An attractive fiscal environment strengthens Switzerland's competitiveness as a location for business and research

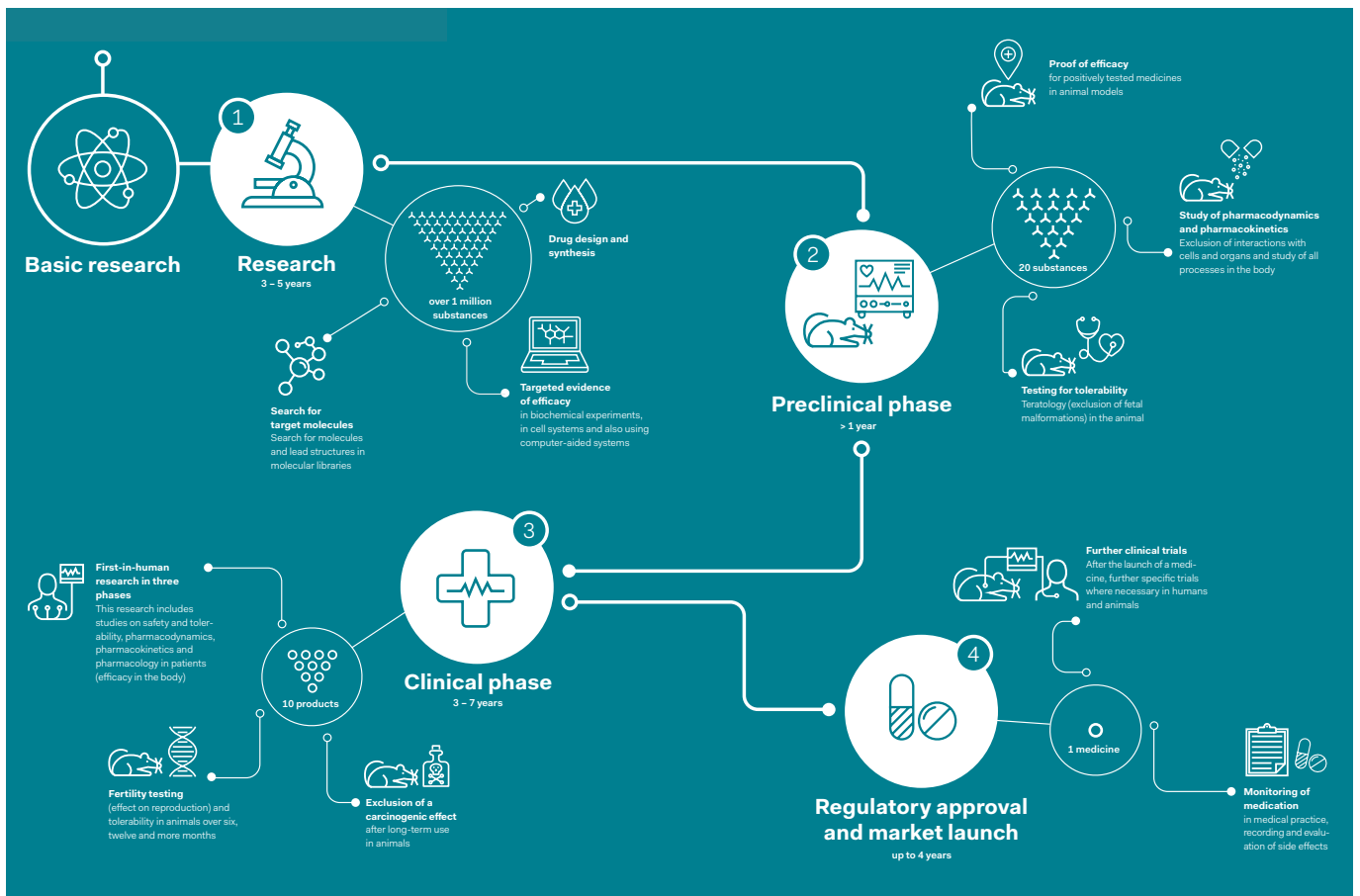
One of the major challenges relating to framework conditions that is faced by Switzerland's research-based pharmaceutical industry is the need to maintain an attractive fiscal environment. Switzerland must maintain its taxation lead and preserve its fiscal attractiveness. In response to international pressure, the country has abolished the special taxation arrangements for holding companies as well other tax regimes. Replacing these arrangements is essential to maintain the country's attractiveness in international tax-based competition. TRAF, which was approved on 19 May, takes account of the pharmaceutical industry's core concerns, providing an attractive fiscal environment that will ensure the country remains a competitive business and research location.

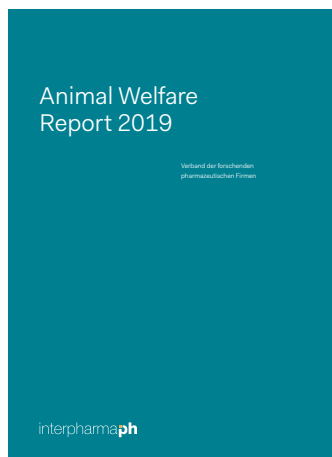
Animal Welfare

Continuous engagement by the pharmaceutical industry at national and international level

The pharmaceutical industry has an obligation to society to develop new, life-improving medicines to treat – or, if possible, even cure – the countless serious and complex illnesses of our age such as cancer, Alzheimer’s disease, mental illness and AIDS. Patients are entitled to the assurance that these medicines are safe. Before a new active substance can be tested in humans in clinical trials, it has to successfully pass a series of pre-clinical tests designed to guarantee its safety for humans. Although the research community has worked extremely hard to successfully develop alternative methods to animal testing, there is still an unavoidable need for limited testing in animals. Interpharma’s 2019 Animal Welfare Report is the ninth to describe the efforts being made under the association’s animal protection charter.

A complex development process





By contrast, initiatives demanding a full or partial ban on animal testing would do considerable damage to Switzerland as a centre of research, since the country's lack of natural resources makes it heavily dependent on research and innovation. Conscious of the fact that animal testing is still essential to medical progress and there is a major need for research, Interpharma is opposing such bans, focusing instead on promoting the 3Rs – Replace, Reduce, Refine – for example by supporting the federal government's 3RCC competence centre. This is in line with the principle of "control rather than abolish".

In August 2019, Interpharma had an opportunity to testify its engagement under its animal protection charter and its commitment to promoting the 3Rs in detail at a hearing of the National Council Science, Education and Culture Committee (SECC-N).

Federal popular initiative to ban animal testing

The popular initiative "Yes to banning animal and human testing – Yes to research routes that encourage safety and progress" was submitted on 18 March 2019. It demands an unconditional ban on animal testing and research in humans as well as a ban on imports of all products that have been developed either entirely or partly using animal testing.

If the initiative's radical demands were adopted, medicines research, clinical trials in hospitals and even basic research at universities – including social scientific studies – would no longer be possible in Switzerland. The country would be completely cut off from medical progress. In addition, the ban on trade in products developed with the aid of animal testing and clinical research might result in the population being denied access to life-saving medicines. The initiative would also have a huge impact on sectors such as agriculture, veterinary medicine and the food industry.

In its message adopted on 13 December 2019, the Federal Council recommends that parliament dismisses the project with no counter-proposal. Interpharma welcomes the clarity of this position since the initiative would seriously jeopardise Switzerland as a location for research and cut off access to new and vital medicines in the country. The parliamentary debates will start in 2020.



CORE TOPICS

Patient Access

Faster access to innovations for patients

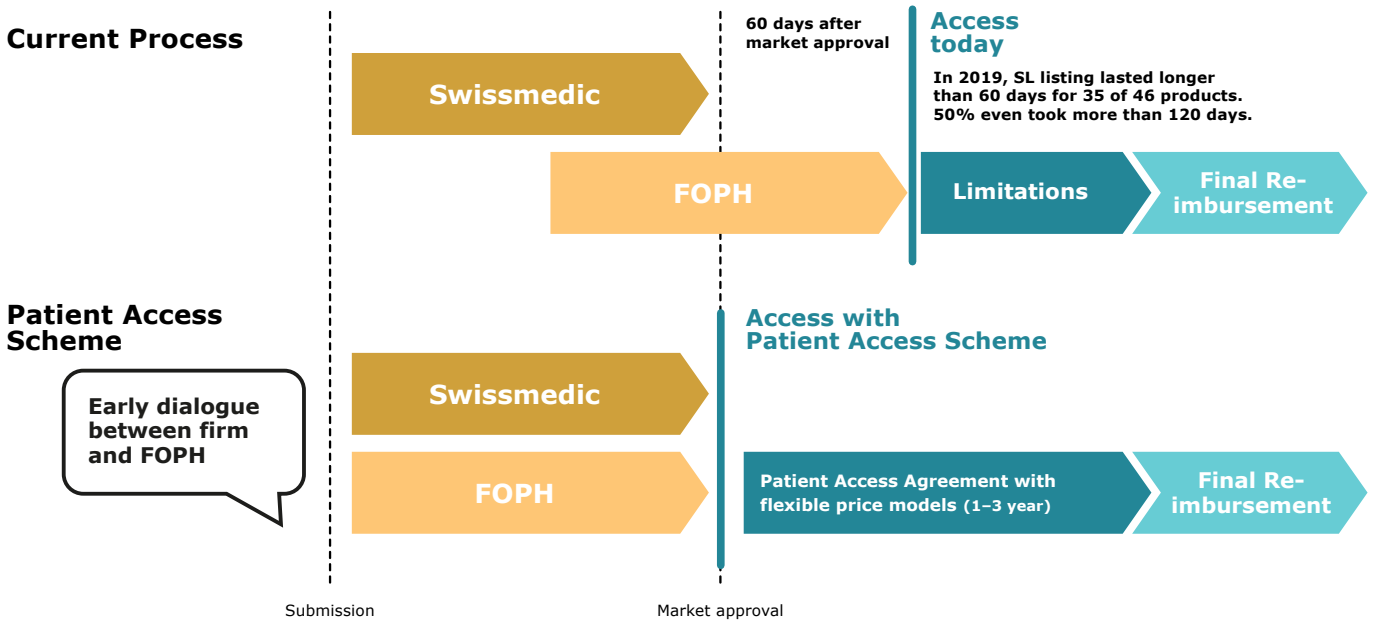
So that medicines are reimbursed from the day they are authorised

In recent years, pharmaceutical research and development have achieved rapid progress by delivering novel approaches to treatment. As positive as these developments are, they also present new challenges for social insurance agencies such as the Federal Office of Public Health (FOPH) because they are stretching the otherwise tried-and-tested standard system of reimbursing medicine costs to its limits. Innovations are often used in several indications or in combinations; in addition they may only have to be administered once, or may only be effective in a certain group of patients. All of this often makes it difficult to adopt a standard approach to the reimbursement for new treatments.

Consequently, there are growing delays in evaluating newly authorised treatments, which in turn increases the amount of time it takes to get them to patients. According to Interpharma's statistics, 136 applications for inclusion in the list of compulsorily reimbursed products had not been completed at the end of 2019. This is more than twice as many as in 2015. A study by the University of Zurich shows that in 2018, it took an

average of 463 days for oncologicals to be authorised for reimbursement, even though the Ordinance generally only provides for 60 days. This is resulting in time-consuming applications for one-off cost approvals under Art. 71 a–d of the Health Insurance Ordinance and challenges the principle of equitable access.

Accelerated Patient Access



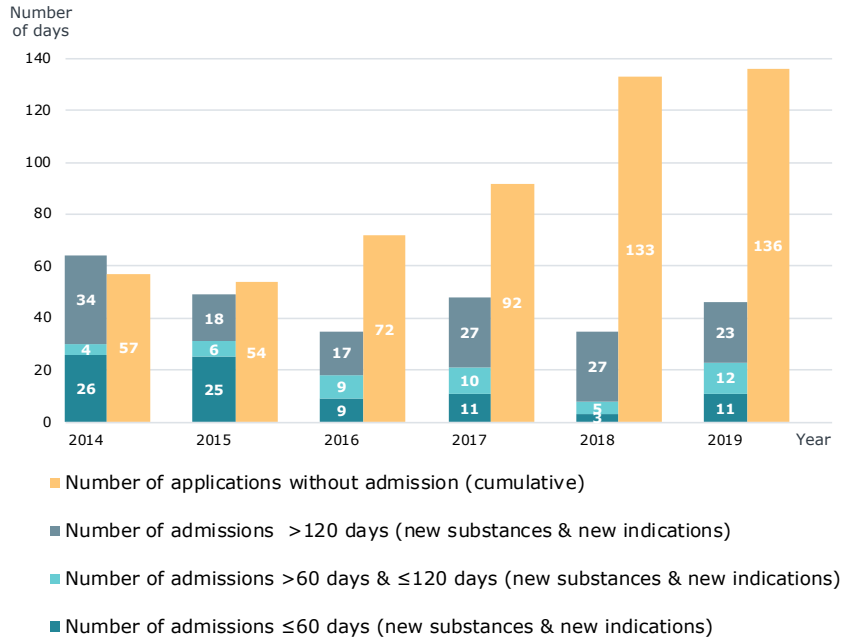
Interpharma is supporting patients’ interests by demanding access to innovations from the day they are authorised by Swissmedic. This will mean providing the Federal Office of Public Health (FOPH) with modern tools and expertise with which to assess the benefits of novel treatments. Interpharma has drafted a proposal that provides for fast-track access to innovations that meet urgent medical needs in addition to the standard process. This includes early-stage dialogue between companies and the FOPH, application of the FOPH process at an earlier point in the Swiss-medical authorisation phase, a case-specific committee of subject experts, flexible reimbursement models and binding deadlines.

Interpharma is inviting the Federal Department of Home Affairs / FOPH and stakeholders in the healthcare system to engage in dialogue with the aim of driving these improvements forward rapidly and in partnership. We are confident that optimising the process for adding products to the list of pharmaceutical specialities by applying the principles described above will bring about a sustainable improvement in access to innovations for patients in Switzerland. In pursuit of this aim, the industry is willing to share information with the regulatory authorities at an earlier stage, to submit applications quickly and adopt pricing models that will reduce the uncertainties associated with early approval.

Access Delay and non-listing

Interpharma statistics: time to listing and cumulative non-listings

- By the end of 2019, 136 submissions have not (yet) been listed on the SL. They have accumulated strongly since 2015.
- In 2019, only 11 out of 46 applications have been admitted on the SL within 60 days (24%), as stipulated by the regulation.
- 50% of all SL-admissions in 2019 took longer than 120 days (23 out of 46).
- SL-Admission is strongly delayed since 2016.



Sources: SL, Swissmedic, calculations Interpharma

Newspaper articles: «Accelerate access to innovation» and «Deadly lottery for cancer patients»

Zugang zu Innovation beschleunigen

Zum Wohle der Patienten

Dr. René Buholzer

Geschäftsführer Interpharma AG

In der Schweiz leben wir heute länger und besser, auch weil die Bevölkerung von innovativen Arzneimitteln profitiert und sie Zugang zu einer qualitativ hochwertigen Gesundheitsversorgung hat. Die Pharmabranche trägt in hohem Masse zu dieser Qualität bei, und die Schweiz bietet innovativen Pharmaunternehmen traditionell attraktive Rahmenbedingungen. Herausforderungen wie die Auswirkungen der demografischen Entwicklung auf das Gesundheitswesen fordern jedoch alle Anspruchsgruppen, und die Standortattraktivität ist von vielen Seiten unter Druck. Damit die Schweiz auch noch 2030 einer der weltweit führenden Pharmastandorte sein und von hochwertiger, nachhaltiger, finanzstarker medizinischer Innovationen sowie dem Beitrag der Pharmaindustrie zu Wohlstand und Lebensqualität profitieren kann, braucht es eine gemeinsame Strategie sämtlicher Akteure. Mit den in ihrem Strategiebericht *Pharmastandort Schweiz 2030* vorgeschlagenen Maßnahmen lanciert Interpharma die Diskussion über die Zukunft der Schweiz als Pharmastandort (Abb. 1).

Rasante Fortschritte in Forschung & Entwicklung

Das enge Zusammenwirken von Pharmabranche, Politik und Behörden ist besonders in Bezug auf den raschen und breiten Zugang zu innovativen Arzneimitteln gefragt – eine der aktuell dringlichsten Herausforderungen.

In den letzten Jahren hat die Forschung und Entwicklung mit neuartigen Therapien bahnbrechende Fortschritte geliefert, etwa im Bereich der Zell- und Gentherapien und Immunonkologie. Erkrankungen, die früher tödlich verliefen oder mit langwierigen schweren Einschränkungen verbunden waren, können heute wirksam behandelt oder gar geheilt werden. Die wissenschaftliche Entwicklung schreitet hier unverändert rasch voran, so dass Patienten und ihre Familien auf weitere Durchbrüche hoffen dürfen.

So positiv diese rasante Entwicklung ist, bringt sie doch auch neue Herausforderungen für alle Anspruchsgruppen, insbesondere für Sozialversicherungsträger wie das Bundesamt für Gesundheit (BAG). Die heutigen modernen Therapien werden in einer Vielzahl von Indikationen oder in Kombination mit anderen Arzneimitteln angewandt, entfalten ihre Wirkung bereits bei einer einmaligen Anwendung oder wirken zielgerichtet nur in einer bestimmten Patientensubpopulation. Damit stößt das gegenwärtige System der Medikamentenvergütung an seine Grenzen, was zu einer zunehmenden

Verzögerung in der Beurteilung neuer zugelassener Therapien führt – und somit den Patienten länger den Zugang verwehrt.

Handlungsbedarf beim Vergütungsprozess

Statistiken von Interpharma zeigen, dass für rund 30 % der seit 2016 beim BAG eingereichten Dossiers noch keine Lösung für die Vergütung gefunden wurde. Obwohl die entsprechende Verordnung¹⁾ eine Frist von 60 Tagen vorsieht, dauerte es 2018 im Durchschnitt (Median) 162 Tage, bis von Swissmedic zugelassene neue Therapien²⁾ in die Spezialitätenliste (SL) aufgenommen und somit von der Grundversicherung vergütet wurden. Die Folge sind für alle Beteiligten aufwendige Kostengrabschgesche im Einzelfall³⁾ und damit verbunden die finanzielle Kontext beobachtet: In Bezug auf den Zugang zu neuen Krebsmedikamenten ist die Schweiz ins Mittelfeld abgerutscht. Diese Zahlen sind nicht nur schlecht für die Patienten, sondern senden zusätzlich ein negatives Signal für den Innovations- und Forschungsstandort Schweiz.

Diese inakzeptable Situation gilt es dringend zu verbessern und den gleich-

AUTOR



Dr. René Buholzer

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Wirtschaft

Pionier der Klimashutzerei
Stephan Schmidheiny gericht
über Greta und die Milliarde, die
er verschrenkt hat. 28

Rendite mit Hülfsgehlem
Das Rote Kreuz sucht neues
Geld von Investoren – und zahlt
ihnen sogar Zinsen. 27



Tödliche Lotterie für Krebskranke

Bis Krankenversicherungen neue Krebstherapien vergüten, dauert es in der Schweiz immer länger. Viele lehnen aus Kostengründen die bestmögliche Behandlung für einen Patienten ab. Von Birgit Vogt

Wie alle Patienten in der Schweiz, sind auch die Krebskranke in der Schweiz auf die Leistungen der Grundversicherung angewiesen. Doch wenn es um die Finanzierung neuer, teurer Medikamente geht, wird es schwierig. Die Krankenkassen sind oft nicht bereit, diese zu vergüten, was bedeutet, dass Patienten auf ihre eigenen Ressourcen angewiesen sind. Dies führt zu einer Situation, die als 'tödliche Lotterie' bezeichnet wird, bei der Patienten Glück haben müssen, um die bestmögliche Behandlung zu erhalten. Die Artikel 'Der Hürdenlauf' und 'Signale oder Rufen' behandeln diese Themen.

pharmal - Statements der Verfalde 11



CORE TOPICS

Market approval

Entry into force of the revised Therapeutic Products Act and associated ordinances



The revised Therapeutic Products Act and associated ordinances entered into force on 1 January 2019. The new legislation involved major changes to the processes by which Interpharma member companies submit new medicines to the authorities for authorisation and the ways in which market approval can be subsequently modified or extended once it has been granted. Last year was primarily about gaining experience with the new processes. The experience of the majority of member companies was positive. Implementation problems were discussed with the authorities at roundtable meetings and passed on to them for further processing. The joint benchmarking study on authorisation times for human medicines being conducted by the industry and Swissmedic will show what impact the changes in the Act and ordinances are having. The study, which uses 2019 data, will be published in 2020.

Medicinal product safety, coding and serialisation of medicine packaging

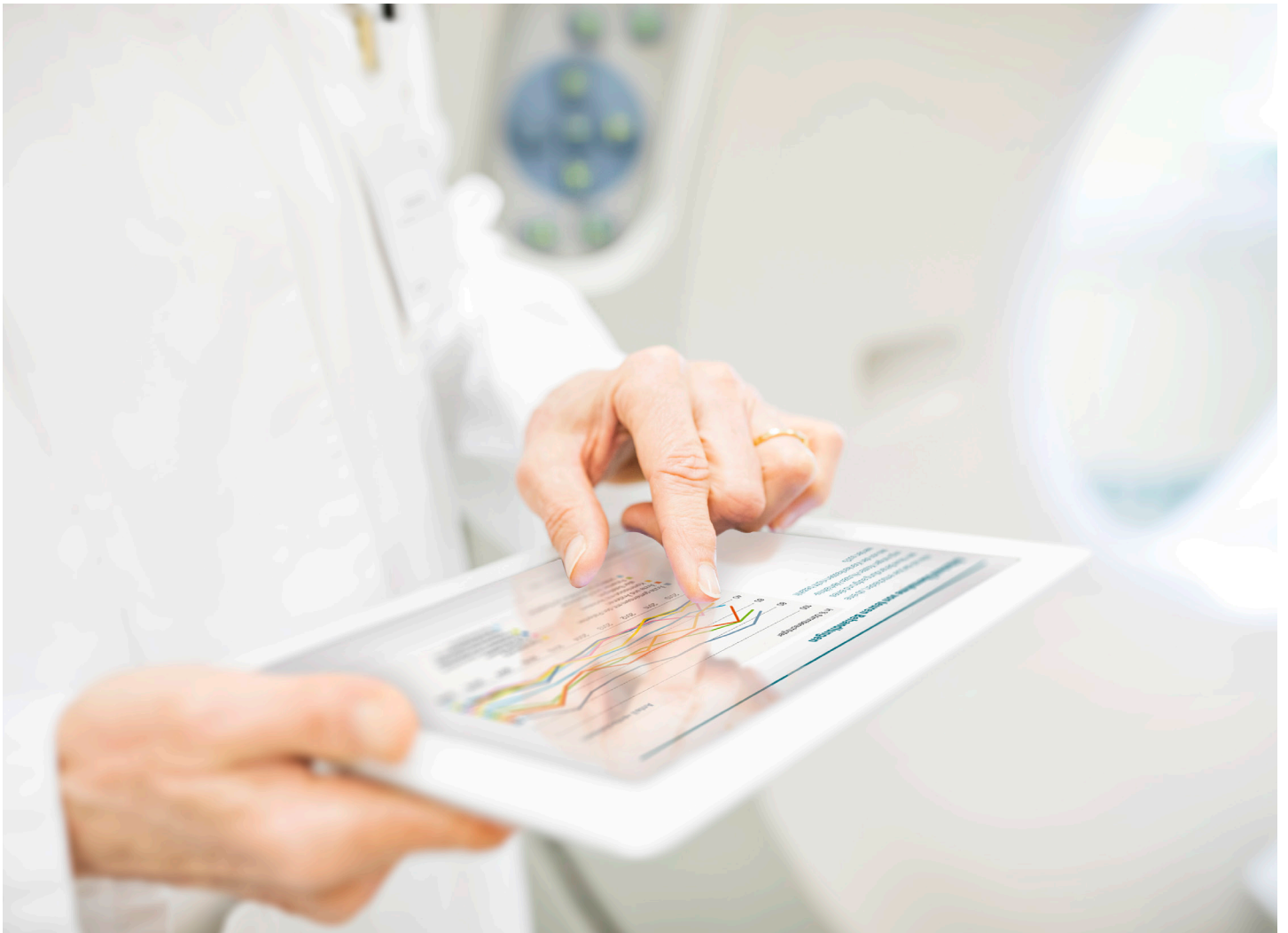


The Swiss Medicines Verification Organisation (SMVO) started running its verification system as planned. The member companies of Interpharma have joined the SMVO. Interpharma is actively involved in the SMVO Board and technical steering group. The federal government is supporting efforts to enhance medicine safety through its ratification of the MEDICRIME Convention, the amendment to Art. 17 a of the Therapeutic Products Act and the Ordinance on individual identification features and safety precautions on human medicinal product packaging. Interpharma welcomes these regulatory steps and has provided input on them during the consultation process.

Optimisation of authorisation processes: approval deadlines and processes

Interpharma welcomes the introduction of a new “temporary authorisation” (Art. 18 TPLO) for medicines used to identify, prevent or treat diseases that could lead to serious invalidity, cause severe suffering possibly resulting in death, or swiftly result in the death of a patient. In addition, potential for optimisation was identified and quickly implemented by revising guidance documents.





CORE TOPICS

Switzerland's healthcare system

Health monitor

Quality before costs

Since 1997, the health monitor has been providing information on Swiss voters' views on healthcare in Switzerland. Each year the gfs.bern research institute surveys a representative sample of 1,200 voters on behalf of Interpharma. To ensure comparability over time, the majority of questions do not change from year to year.

In 2019, voters were still satisfied with the Swiss health service. 86% of the people surveyed had a very positive or generally positive overall impression. One of the reasons for the high level of satisfaction, despite the high cost of healthcare, was the perceived quality of the healthcare system. Respondents were generally not in favour of experiments in cost curbing, but instead wanted to see a greater focus on healthcare quality

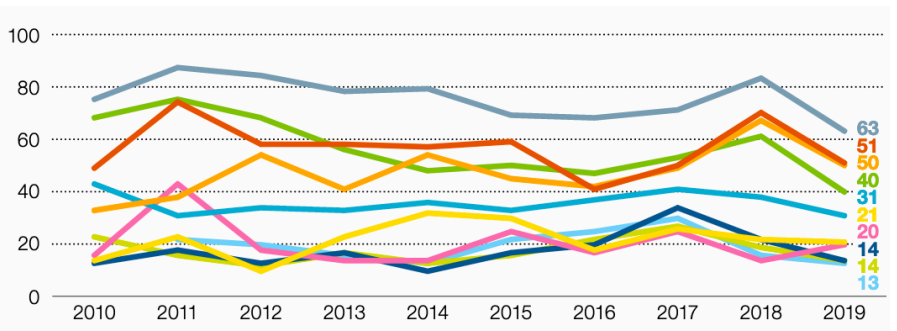
and provision. In particular, they were unwilling to accept restrictions on their free choice of doctor (27%) or on access to medication (38%). The respondents wanted fast, broad-based access to innovative medicines and treatments, especially in the topical areas of cancer and rare diseases. 93% of voters believe that everyone should have access to innovative cancer treatments, and the same amount of people are happy for treatments for rare diseases to be reimbursed via basic insurance. Swiss citizens do not want two-tier medicine when it comes to access to innovation.



Decision to reimburse expensive treatments

“Who should decide whether a very expensive treatment should not be paid by health insurance companies due to an unfavorable cost-benefit ratio?”

in % of people with voting rights



- Doctors together with the patients
- Doctors
- Commission with representatives of all parties concerned
- Patients
- Independent institute of experts
- Hospital administration
- Health insurance companies
- Federal Office of Public Health
- Conference of Cantonal Health Directors
- Federal Court

Sources: gfs.bern, Health monitor 2019 (n in each case approx. 1200)

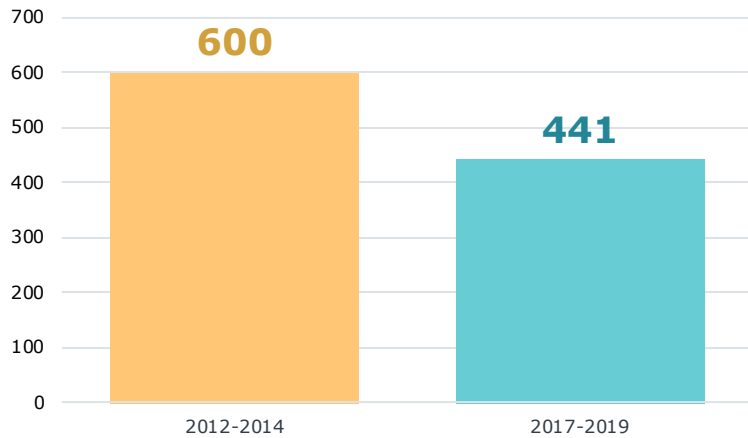
Healthcare costs

The pharmaceutical industry is making disproportionate contributions to cost control

The health insurance premiums for 2020 were announced at the end of September 2019. Contrary to many of the fears that were expressed, premiums have only risen by 0.2%. While this is primarily good news for the people who have to pay those premiums, it is also proof that institutionalised cost-saving measures planned with a long-term perspective are having an effect. Interpharma was particularly pleased that the savings of 1 billion CHF since 2012 achieved through the medicine price reviews was personally acknowledged by Federal Councilor Alain Berset. Institutionalised price reductions make the pharmaceutical industry the only player to contribute disproportionately to cost reduction. In view of the fact that medicines only account for around 13% of total health costs, the onus is on the other stakeholders in the healthcare system to make their own contributions.

Total savings (in million CHF) through 3-years price reductions 2012–2019

Additional savings through price reductions after limitations and extensions of indications 2016–2017:
105 mn CHF

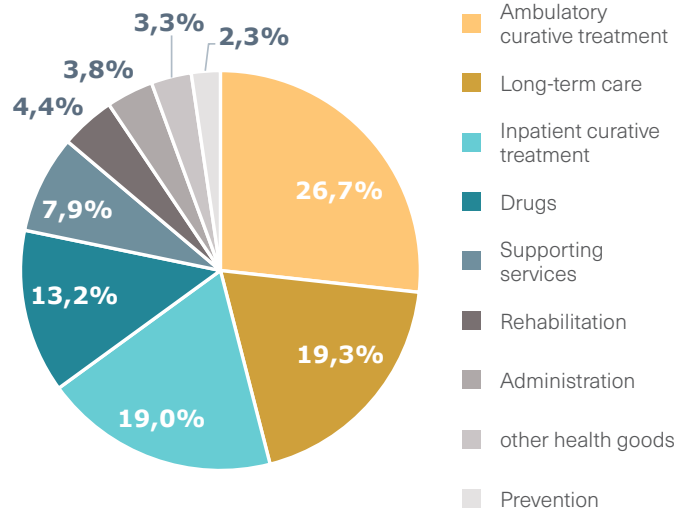


Stable share of drugs in healthcare costs

In 2017, a total of 13.2% of the total costs were attributable to the drugs. This means that out of every 100 healthcare francs, around 13 are spent on medicines.

Although there was a slight increase of 0.2 percentage points compared with the previous year, the proportion has remained stable since 2010 despite the introduction of numerous innovative medicines.

At 20.4%, the share of OKP costs attributable to medicines has also remained constant over the years. In particular, the triennial price review rounds mean that although new, more expensive drugs come onto the market, the prices of already reimbursed drugs often fall, which keeps the share of OKP costs stable.



Cost transparency in the Swiss healthcare system



In his numerous public appearances, presentations and expert discussions during 2019, Interpharma CEO René Buholzer laid bare the myths surrounding costs in the Swiss healthcare system and explained the facts.

For example, the Technology Forum Zug’s pharma cluster held a lunch event in September 2019 entitled “Myths and facts: cost transparency in the Swiss healthcare system”. People from the life sciences sector took the opportunity to discuss which assumptions and figures represent reality and which are just alleged facts.

Price comparison with other countries

At the annual joint media conference held by santésuisse and Interpharma, figures were presented to show that the prices of patent-protected drugs are only about 7% above the prices of the nine European reference countries. The high level of media interest generated a large number of balanced articles and radio and TV reports in all relevant Swiss media, in which we, as the pharmaceutical industry’s representative, were able to take a partly controversial stand jointly with representatives of the insurance companies.

MEDIKAMENTE

Unterschiedliche Schlüsse aus dem Preisvergleich mit dem Ausland

sda • 16.4.2019 um 16:05 Uhr



Generika sind in der Schweiz nach wie vor fast doppelt so teuer wie in anderen europäischen Ländern - hier ein Generikum aus Deutschland. (Symbolbild)

© Keystone/AP/FRANKA BRUNS

Quality of the healthcare system

Interpharma supports initiatives to enhance the quality and efficiency of the healthcare system

One of the reasons people in Switzerland are now living longer, better lives is because they benefit from innovative medicines and have access to high-quality healthcare provision. However, factors such as the impact of demographic change on the healthcare system represent a challenge for all stakeholder groups. The discussion that is taking place in society on the economic and ethical implications of medical progress is and remains both challenging and important. At the same time, the healthcare system has to adapt to new requirements. For this reason, Interpharma once again supported a raft of initiatives in 2019 that both promote dialogue and develop specific measures to further improve the quality and efficiency of the healthcare system.



santeneXt

santeneXt, the multi-stakeholder do tank which Interpharma co-initiated, aims to accelerate the innovation process for the benefit of patients by means of a shared process of learning from experience that involves the various stakeholders in the healthcare system.

The platform brings together active players, encourages pilot projects and promotes dialogue on the results. Two successful workshops and a discussion dinner were held during 2019.

Furthermore, the first santeneXt prize for excellence was awarded to a ground-breaking project on 21 August 2019.

www.santeneXt.ch



allianz q

allianz q has set itself the goal of steering the political discussion on healthcare provision away from costs and towards the quality of services and products. Its philosophy and actions are geared to benefits and added value for patients. allianz q wants to embed quality as a principle underlying the healthcare system and to continuously improve that quality. It pursues this goal by comparing the healthcare system and healthcare provision in Switzerland with the best national or international examples. With support from Interpharma, allianz q held its 10th conference in June 2019 on the subject of "Patient-centred outcome measurement". www.allianzq.ch



Uniform financing of outpatient and inpatient services (EFAS)

The growing trend towards transferring inpatient services to the outpatient setting is positive since it both meets a patient need and demonstrably saves costs. Without uniform financing, however, premium payers may end up unilaterally bearing the cost of this shift, since outpatient care is funded entirely from premiums. By contrast, the financial burden on the Cantons would be reduced accordingly. Under EFAS, the Cantons would contribute to the costs of outpatient care, and the financial burden would be distributed in a socially fairer manner.



EINHEITLICHE FINANZIERUNG
VON AMBULANTEN UND STATIONÄREN LEISTUNGEN

The partners in EFAS – one of which is Interpharma – are of the opinion that uniform financing of outpatient and inpatient services is urgently required to eliminate false incentives, contain costs without detriment to quality of care and strengthen integrated care. The partners in EFAS regard the Federal Council’s essentially positive assessment of the submission in August 2019 as an important milestone. However, it is astonishing that the Federal Council wants to make implementation of EFAS so heavily dependent on the Cantons, especially given the widespread support for this important reform. www.pro-efas.ch

Dialogue events on the Swiss healthcare system

In view of the elections, health policy was a particularly important topic of discussion during 2019, alongside climate protection and EU-related issues. Interpharma CEO René Buholzer spoke at a number of events and took part in expert discussions, where he represented the pharmaceutical industry’s perspective. In addition, Interpharma organised its own well-attended events, such as that held with the Zurich Chamber of Commerce in Zurich in October 2019, or that staged with *economiesuisse* and *LeTemps* in Lausanne in September 2019.





CORE TOPICS

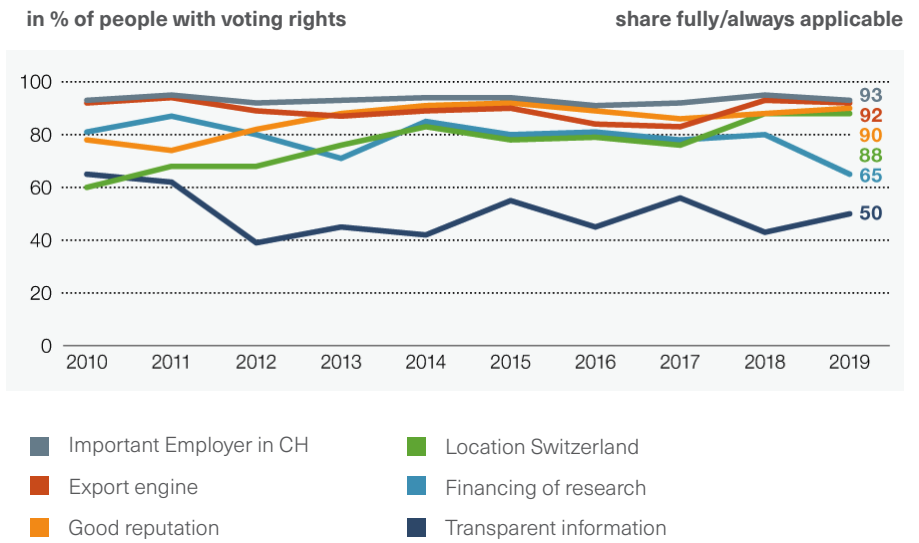
The industry's reputation

Reputation among the general public

In addition to the annual health monitor survey, the gfs.bern opinion research institute has for many years regularly surveyed public opinion on the pharmaceutical industry on behalf of Interpharma in what is known as the reputation monitor. In 2019, the two surveys revealed differences in public perceptions of the pharmaceutical industry. People particularly appreciate its role as a major employer (93% of respondents), its contribution to the economy as an exporting industry (92%) and its good professional reputation abroad (90%). Moreover, 88% agree that the pharmaceutical industry is interested in Switzerland as a location. However, opinions are more critical on the subject of transparency. Exactly half the people surveyed (50%) are of the opinion that the pharmaceutical industry keeps people up to date on its activities in full transparency.

Statements on the pharmaceutical industry

“Here are some general statements about the pharmaceutical industry in Switzerland. For each statement, please tell me to what extent, based on what you know, it applies to the pharmaceutical industry.”



Source: gfs.bern, Health monitor 2019 (n in each case approx. 1200)

Gesundheit heute



Once again, the “gesundheit heute” programme attracted around seven million viewers in 2019. Each programme was watched by an average of 150,000 people, making an average market share of around 18%. Compared with other TV programmes, viewer figures are constant throughout the entire transmission. As Interpharma is one of the sponsors of “gesundheit heute”, it can suggest topics for programmes to the production team. However, the programme makers produce the broadcasted items independently from Interpharma.

Speakers' hub

For the past six years, Interpharma ambassadors have been on the way in the French- and German-speaking Switzerland, engaging in dialogue with the public and explaining how research and development work, how patients benefit from new medicines and what contribution the pharmaceutical industry makes to the Swiss economy. The ambassadors are available as guest speakers for regional organisations, associations, institutions and companies in the health, business and education sectors.

The Interpharma speakers' hub currently comprises some 30 ambassadors from 15 member companies. Between them, they represent various functions and areas of pharmaceutical companies, from CEO to Medical Director and Communications Manager. They gave 10 presentations during 2019.

Reputation in the media

Evaluations by fög, the University of Zurich’s Research Institute for the Public Sphere and Society, show that the pharmaceutical industry has one of the best reputations of any sector of the Swiss economy. The pharmaceutical industry’s strong commitment to Switzerland as a centre of business and research significantly enhances its standing. In the media, the pharmaceutical industry has increasingly assumed the role of leading sector. The key factors that have a positive influence on the pharmaceutical industry’s image are primarily the very good performance figures posted by pharmaceutical companies and the beneficial effects created by the pharmaceutical industry’s major significance for Switzerland as a location.

Media work and presence

Interpharma remains the key point of contact for media representatives for all pharma-related issues. In addition to supplying information in response to media enquiries, Interpharma also undertakes its own proactive media work.



Three media conferences were held in 2019. At the end of May, the 10th joint media conference on the 2018 international price comparison was held with santésuisse. In June, Interpharma organised a media conference to present the result of the 2018 gfs health monitor survey. Finally, the media conference on the “Pharma hub Switzerland 2030” strategy report took place in December. The media conferences were well attended and generated broad print, electronic and online media coverage.

In addition to a series of background discussions with key media, nine media releases were circulated in 2019, all of which were well received. In total, Interpharma was directly quoted over 193 times in Swiss print media, significantly more than in the past two years. Furthermore, a substantial amount of background information, such as pharmaceutical market data, was supplied as input for reporting.

Interpharma also gave its views on various pharmaceutical and research policy issues in TV and radio statements and interviews. In June, René Buholzer joined an ethics specialist, representatives of a health insurance company and an oncologist in a discussion on the “Club” TV programme entitled “Profits or life?”

As the sole industry representative in the discussion, he explained the opportunities and challenges of personalised, innovative treatments. In November, René Buholzer was a guest on the “Rundschau” news broadcast, where he argued the case for a broader evaluation of benefits when setting medicine prices.



René P. Buholzer verteidigt an der «Rundschau»-Theke die Preispolitik der Phar...

SRF - 20.11.2019



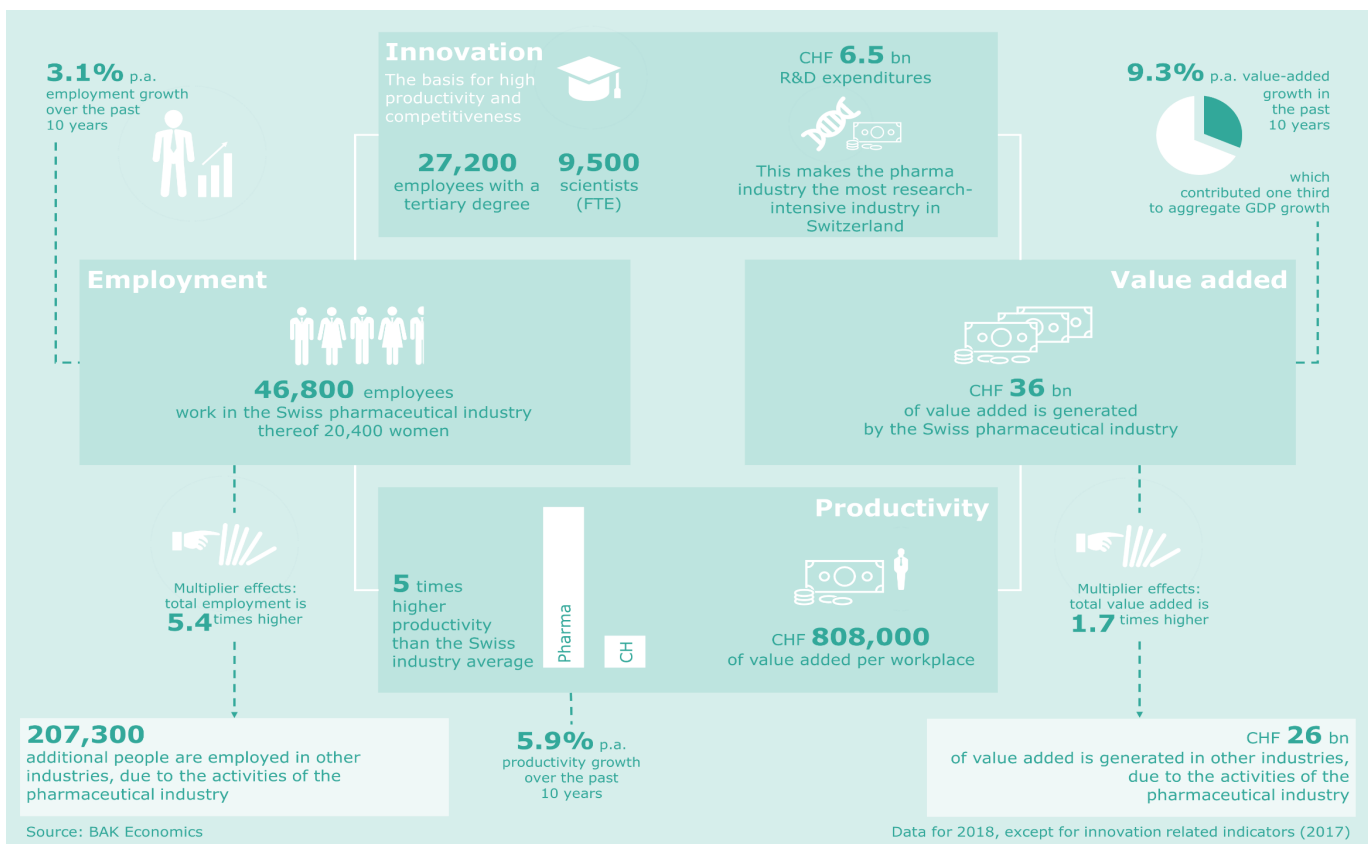
René Buholzer, Interpharma: «Versuchen, Produkte günstig zu produzieren

SRF - 11.02.2019

FACTS AND STATISTICS

In 2018, the pharmaceutical industry in Switzerland employed around 46,800 people. The total employment effect amounts to around 254,100 people; this corresponds to about one in twenty employees in Switzerland. The industry generated around CHF 36 billion in direct value added. With every Swiss franc of value added, an additional 0.73 Swiss Francs of value added was created in other Swiss industries. The total value added contribution from production and In 2018, research activity in the pharmaceutical industry amounted to around 62.1 billion francs – this corresponds to a total of 9.3 percent of total economic output of Switzerland. With 38% share of Swiss exports of goods and export earnings of around 88 billion Swiss francs, the pharmaceutical industry is by far the most important export industry.

Importance of the pharmaceutical industry for Switzerland

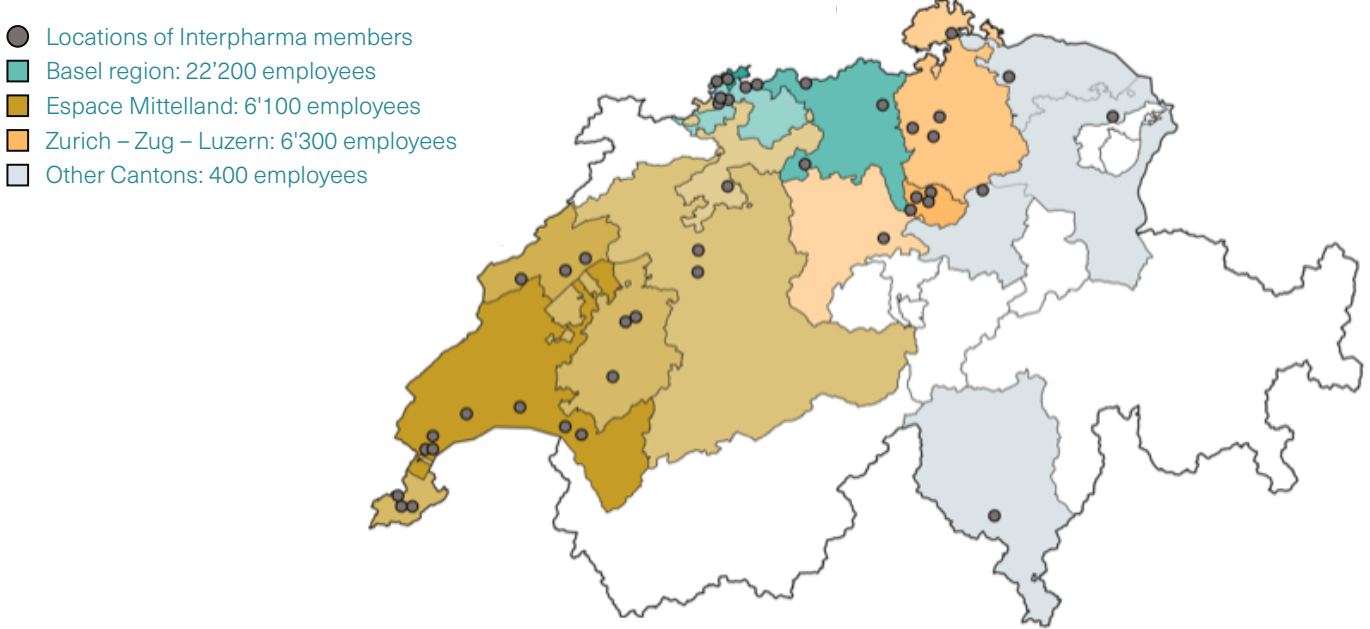


Source: BAK Economics

The pharmaceutical industry as employer (number of employees)

Regional distribution of Interpharma members

Number of employees and locations of Interpharma member companies by pharma cluster, by the end of 2018



The figures are based on the 23 Interpharma companies that were members of Interpharma in June 2019, even if they were not yet members in 2018. Some companies do not break down certain figures by country and the relevant data for these figures are therefore lacking. In the case of companies with several divisions only the figures for the pharmaceuticals division are included.

Source: Interpharma

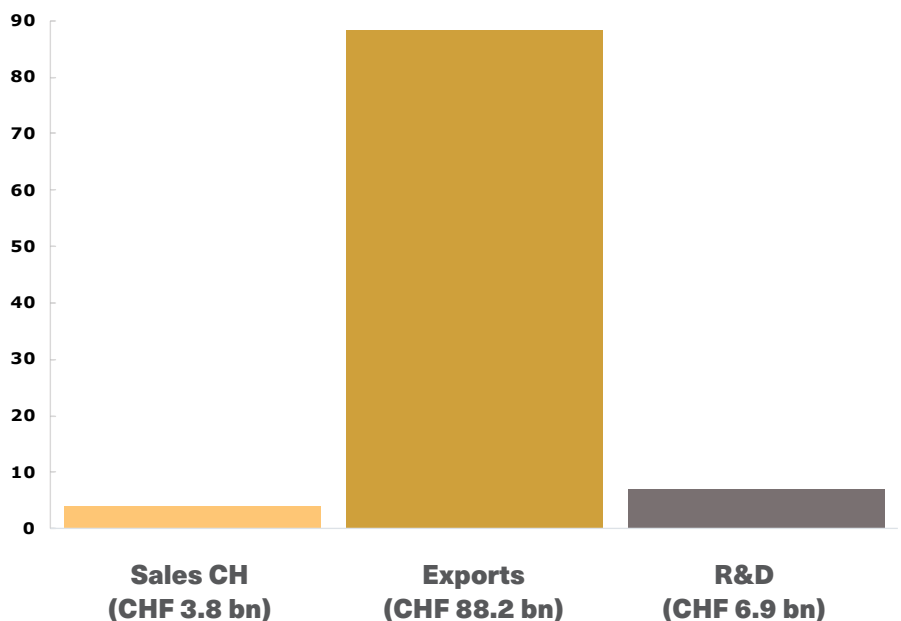
Pharma Sector Switzerland, 2018

Sales CH and R&D

The figures are based on the 23 Interpharma companies that were members of Interpharma in June 2019, even if they were not yet members in 2018. Some companies do not break down certain figures by country and the relevant data for these figures are therefore lacking. In the case of companies with several divisions only the figures for the pharmaceuticals division are included.

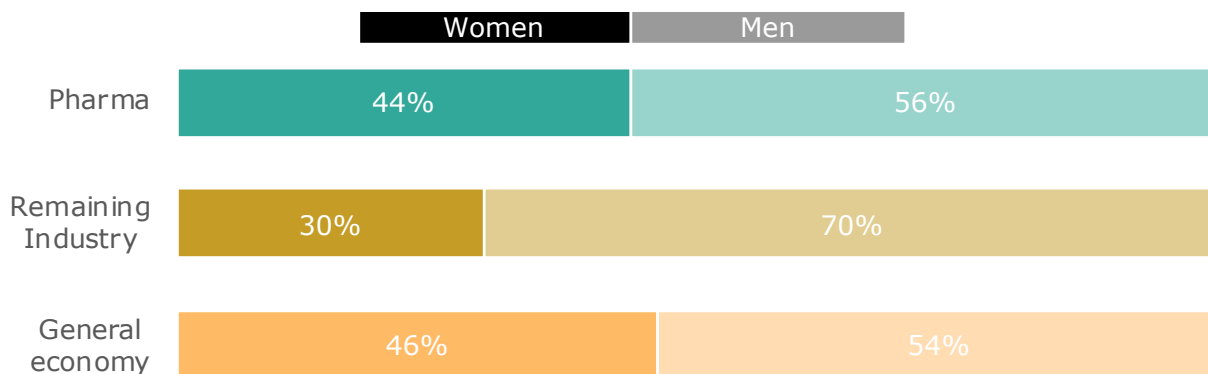
Exports

Refers to the entire industry



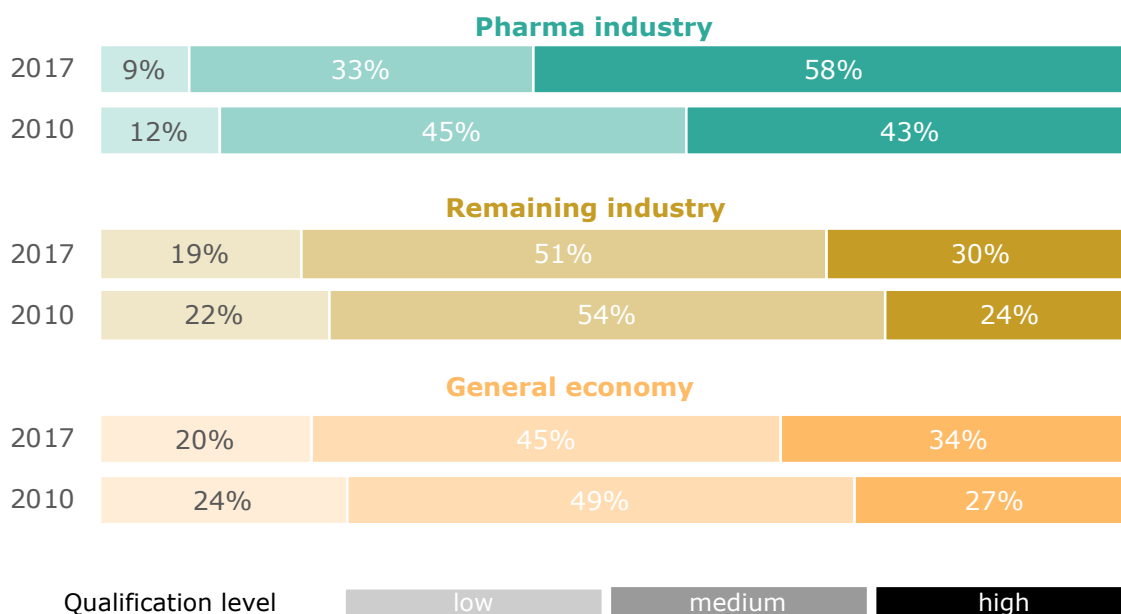
Source: Interpharma (2019); Federal Customs Administration (2019)

Proportion of women (2018)



Source: BAK Economics, FSO

Qualification level (2010 and 2017)



Percentage of employees. The level of qualification is measured by educational achievement

(low = lower secondary, medium = upper secondary, high = tertiary).

Source: BAK Economics, FSO

ABOUT US

Interpharma is the association of Switzerland's research-based pharmaceutical companies. It was founded in 1933 and is headquartered in Basel. Historically, Interpharma was founded by Switzerland's big research-based pharmaceutical companies. With the process of opening that has taken place in recent years, member numbers have risen steeply to the current figure of 23, and Interpharma has evolved into the umbrella organisation for research-based pharmaceutical companies in Switzerland.

Our members – 23 research-based pharmaceutical companies

Johnson & Johnson

 NOVARTIS

 Roche

abbvie

 Allergan

AMGEN

AstraZeneca 

 Bayer

 Biogen.

 Boehringer
Ingelheim

 Bristol-Myers Squibb

 Celgene

 GILEAD

 gsk
GlaxoSmithKline

Lilly

Lundbeck 

MERCK

 MSD
INVENTING FOR LIFE

Pfizer

SANOFI 

 Takeda

 ucb CNS
Innovation.
Inspired by patients.™

 VIFOR
PHARMA

Association of Switzerland's research-based pharmaceutical industry

A strong voice for the pharmaceutical industry

Having a broad base throughout the country strengthens Interpharma's ability to work to ensure Switzerland remains competitive internationally as a pharma and research hub.

The association works closely with all stakeholders in the Swiss healthcare system and international organisations, specifically lobby groups for the research-based pharmaceutical industry at home and abroad.



Members 2019

23 member companies with a combined market share of more than 90% of the patent-protected market

2019 was a year of consolidation following the strong growth in members in recent years. Within the organisation's membership, the takeover of member company Shire by Takeda is worth mentioning. In addition, Johnson & Johnson became a Chapter 1 member alongside Novartis and Roche.

Interpharma currently has 23 member companies, who, by virtue of their different treatment and therapeutic areas, make a substantial contribution to general medical progress and to a better quality of life for individual patients. Interpharma member companies' share of the market for patent-protected, compulsorily reimbursed medicines in Switzerland exceeds 90%.

Board and Management Team

Pharma hub 2030 strategy paper sets direction

Having been adapted to the needs of a growing membership last year, the association structures and governance mechanisms have proven effective in practice.

The Board is the formal decision-making body and determines Interpharma's strategic direction, priorities and budget. It discusses international and pharmaceutical policy topics and location-related issues relevant to member companies with large investments in Switzerland as a location.

The Board met for three formal meetings and actively contributed to the 2030 strategy. President Jörg-Michael Rupp (Roche) chaired the Board with support from Jane Griffiths (Johnson & Johnson) and Mark Never (Novartis), as well as Thomas Lang (MSD) as Chair of the Executive Committee.

Board members 2019

Yolanda	Alagón	Janssen/J&J
Henrik	Asmussen	Amgen
René	Buholzer	Interpharma (Delegate of the Board)
Michelle	Calope	BMS
Jean-Luc	Delay	Takeda
Jeff	Dufour	Pfizer
Johanna	Friedl-Naderer	Biogen
Jane	Griffiths	Actelion/J&J (Vice Chair)
Florian	Ibe	Bayer
Thomas	Lang	MSD (Vice Chair)
Matthias	Leuenberger	Novartis
Mark	Never	Novartis Pharma (Vice Chair)
Tuomo	Pätsi	Celgene
Harry	Råstedt	GSK
Jörg-Michael	Rupp	Roche (Chair)
Nathalie	Stieger	Roche
Josef	Troxler	Vifor

Management Team

December 2019



René Buholzer
CEO and Delegate
of the Board



Heiner Sandmeier
Deputy CEO



Markus Ziegler
Head Patient Access &
Intellectual Property Rights



Susanne Müller
Head Services



Andreas Pfenninger
Head Technical & Regulatory
Affairs



Yves Weidmann
Head Governmental Affairs



Anita Geiger
Head Communications

Interpharma working groups

More than 150 company experts contribute their knowledge to ten working groups

All member companies can delegate experts to Interpharma's ten formal working groups and make their specialist knowledge available to the association. To ensure the organisation's agility, task forces headed by an experienced committee member can be set up at any time.

The working groups and task forces implement their priorities in accordance with the Board's instructions and execute their working plan under the leadership of three strategic committees.

The **Executive Committee** deals with issues relating to patient access, market authorisation and health policy. It is headed by Thomas Lang (MSD) and Oliver Bleck (Roche)

The following working groups report to the Executive Committee:

- **Market Access Working Group**
Chair: Lorenz Borer (Novartis)
Vice Chair: Jan Depta (BMS)
- **Regulatory Affairs Working Group**
Chair: Lukas Brand (Novartis)
Vice Chair: Annette Fichtel Dasen (Abbvie)
- **Good Distribution Practice - Quality Working Group**
Chair: Nicole Kraus (Roche)
Vice Chair: Tamara Bauer (Alloga)
- **Health Care Systems Working Group**
Chair: Martin Hühnerer (Pfizer)

The **Innovation Hub Committee** deals with all issues associated with Switzerland as a centre for research and innovation, and the Swiss pharma and production hub. In particular, it deals with research policy and general economic policy. Its activities last year focused particularly on the preparation of the "Pharma hub 2030" strategy. It was headed by Ludo Ooms (J&J) and Markus Ziegler (Biogen).

The following working groups report to the Innovation Hub Committee:

- **Clinical Research Working Group**
Chair: Simon Rotzler (Bayer)
Vice Chair: Markus Ritter (Novartis)
- **Animal Welfare Working Group**
Chair: Joachim Coenen (Merck)
Vice Chair: Birgit Ledermann (Novartis)

The **Intellectual Property Expert Group** headed by Andreas Porreda (Roche) deals with issues associated with the protection of intellectual property.

In addition, the **Communication Working Group** assists the association of-fice with communication-related matters. It is led by Philipp Kämpf (J&J) and Caroline Hobi (Celgene).

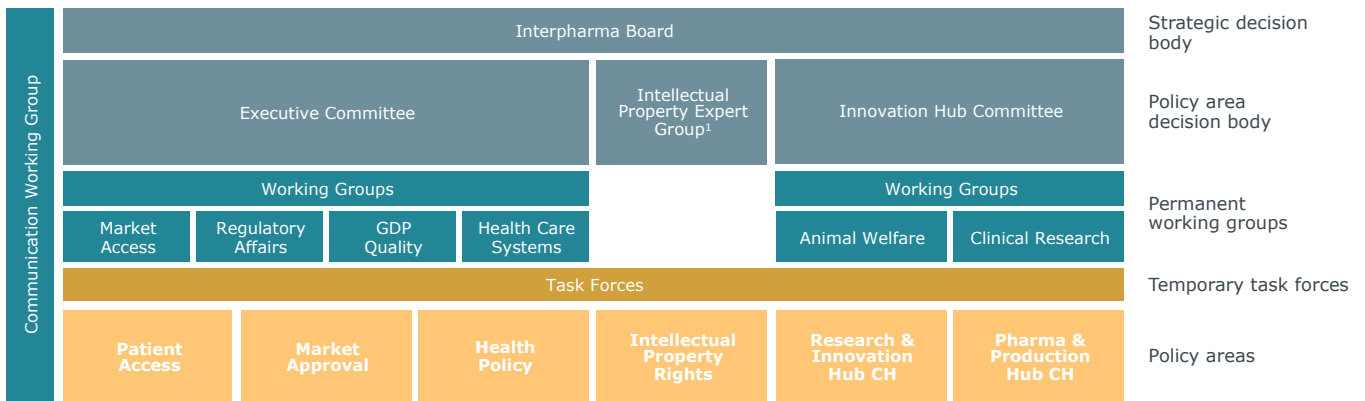
In addition to these permanent working groups, there are also temporary groups that deal with current issues and needs as required.

The **Rare Diseases Task Force** and **Task Force Analysis of Art 58 – 67 rVAM** successfully completed their work during 2019.

The following three task forces will continue their work in 2020:

- **Task Force on Vaccines**
Sponsor: Guido Businger (Sanofi)
- **Task Force Launch santeneXt**
Sponsor: René Buholzer (Interpharma)
- **Task Force Reimbursement of Transplant Products**
Sponsor: Christophe Griolet (Gilead)

Our governance to ensure close member involvement and alignment



¹ Jointly with scienceindustries

Partnerships

An active partner in the health and research arena through cooperation

Interpharma attaches great importance to a broad dialogue on current health and research policy topics and to promoting public discussion of relevant issues. It therefore works with various players from the health and research arena, contributes expertise, and supports organisations and platforms in planning and staging events, doing groundwork and other activities. In everything it engages with, Interpharma attaches importance to examining issues from different perspectives and holding a pluralistic discussion in which contradictory viewpoints are expressed.



PUBLICATIONS

Interpharma's publications are available in several languages and can be downloaded from www.interpharma.ch. Printed versions can be ordered from info@interpharma.ch.

Pharma hub Switzerland 2030

Vision for Switzerland as a centre of pharmaceutical activity in 2030: "Switzerland is still Europe's leading pharma hub in 2030. Our country benefits from high-quality medical innovation and is able to fund this innovation sustainably in the long run. The pharmaceutical industry is a key contributor to the prosperity and quality of life of people in Switzerland." The comprehensive "Pharma hub Switzerland 2030" strategy report summarises all measures proposed by Interpharma and the background to them.



More information about the strategy "Pharma hub Switzerland 2030"

The comprehensive strategy report "Pharma hub Switzerland 2030" summarises all of the measures and how they will be achieved. You can download the report in English, French or German from www.interpharma.ch or order the printed version by email: info@interpharma.ch.



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Facts about the pharmaceutical industry in Switzerland

status 2019

46,800 people
are employed by the pharmaceutical industry in Switzerland. A further 200,000 jobs depend indirectly on the industry.

Now curable
are numerous diseases which were once severe or even fatal, such as hepatitis C. This also thanks to innovative medicines.

10 years
has the life expectancy in Switzerland been increased compared to 50 years ago. Innovative medicines have made a major contribution to this development.

45% women
In its workforce, plus efforts to extend paternity leave, help the industry to achieve a leading position in the area of compatibility of family and career.

5.4%
is the pharmaceutical industry's direct contribution to gross domestic product (GDP). This makes it one of Switzerland's most significant private-industry sectors.

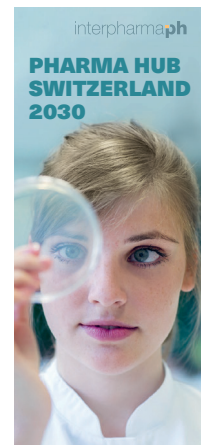
6.5 billion
Swiss francs are each year invested by Interpharma's members in research and development in Switzerland. This means that for every franc generated in Switzerland,

Faster recuperation
is one of the benefits of innovative medicines for patients. This reduces the costs for employers, social security schemes and the healthcare system.

38%
is the pharmaceutical industry's share of total Swiss exports. This makes it the country's most important export sector by far.

30%
reduction in the breast cancer mortality rate compared with 25 years ago. The chances of recovery for children with cancer has almost doubled over the past 40 years.

62 billion
Swiss francs is the total of direct and indirect value added contributed by the pharmaceutical production and research activities. This corresponds to 9.3% of Switzerland's total economic output.



Importance of the pharmaceutical industry in Switzerland

The pharmaceutical industry is a mainstay of the Swiss economy. In 2018 it generated gross value of 36 billion francs in Switzerland, equivalent to 5.4% of the country's total economic output.

Without the pharmaceutical industry's high real growth in value creation – averaging 9.3% annually – growth in Swiss GDP between 2008 and 2018 would have been one third lower.

The pharmaceutical companies' success also benefits other sectors. Factoring in the relevant value chains in companies outside the industry, pharma activities generated value of around 62.1 billion francs in 2018.



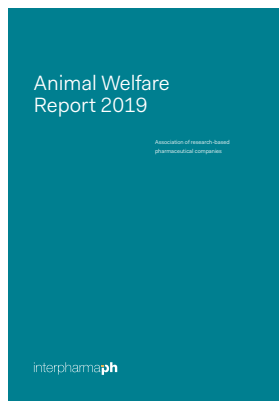
gfs health monitor 2019

The health monitor is intended to provide a reliable information system on Swiss voters' views on healthcare in Switzerland. It is essentially based on an annual survey of at least 1,200 representative voters. The majority of questions do not change from year to year to ensure comparability over time. The gfs.bern research institute has been conducting the health monitor survey on Interpharma's behalf since 1997. It is published regularly.



Animal Welfare Report 2019

This year's annual report is the ninth to be published by the Swiss research-based pharmaceutical industry on the animal protection charter it adopted in 2010. The report contains numerous examples of how Interpharma member companies have further improved conditions in animal testing and enhanced protection for laboratory animals in line with the charter over the past reporting year.



Swiss Pharmaceutical Market 2019

Compendium of data and information on a wide range of aspects of the Swiss pharmaceutical market, including key figures for Interpharma member companies.



Swiss Healthcare 2019

Current figures and information on health indicators, health expenditure and healthcare financing in Switzerland.




IMPRINT


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Competence team

Communications team, Interpharma

Concept and Design

DOCMINE Productions AG