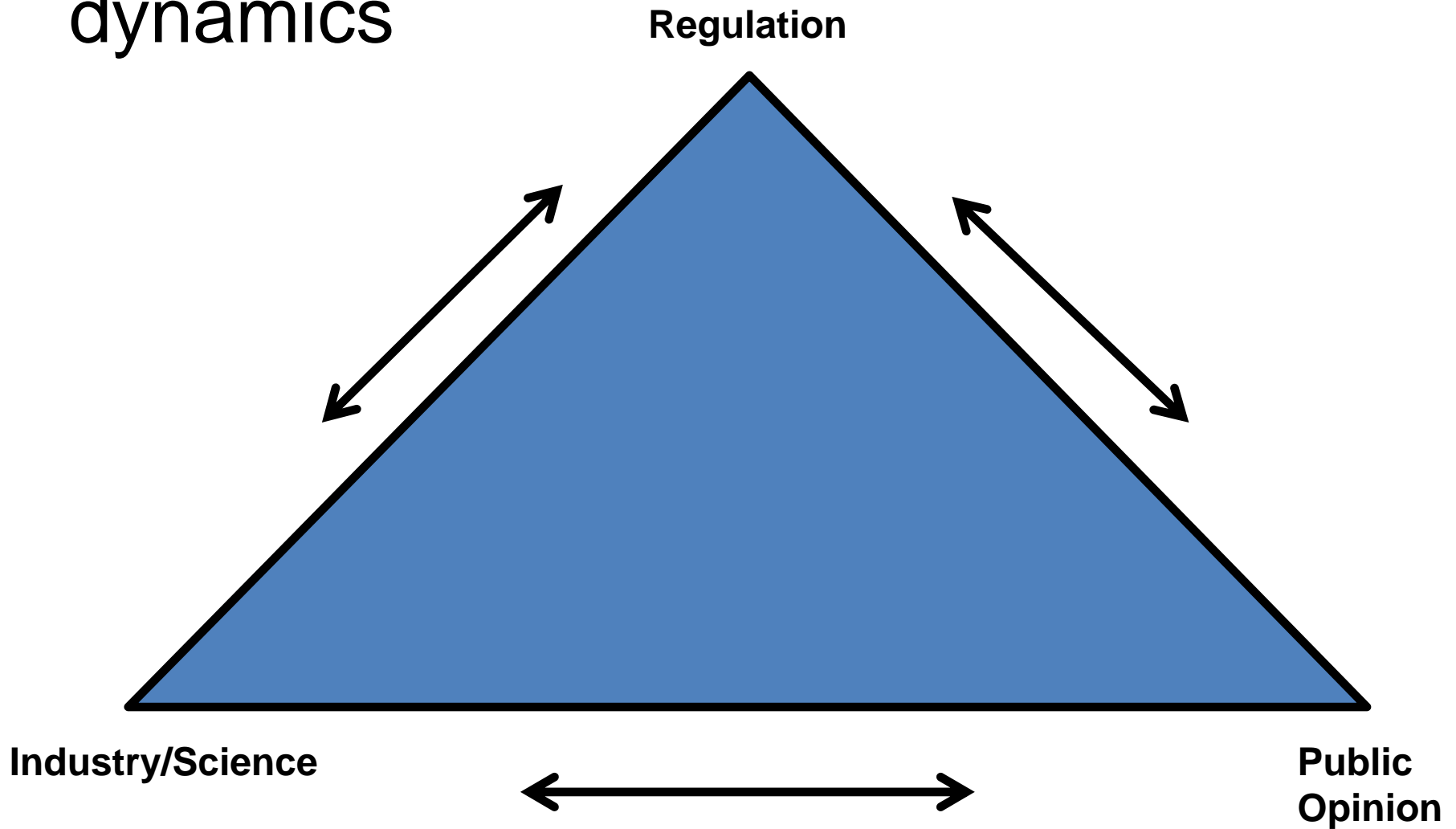




The competitive landscape for pharmaceuticals in Europe

Joanna Chataway and Petal Jean Hackett
Bruges, April 23rd 2013

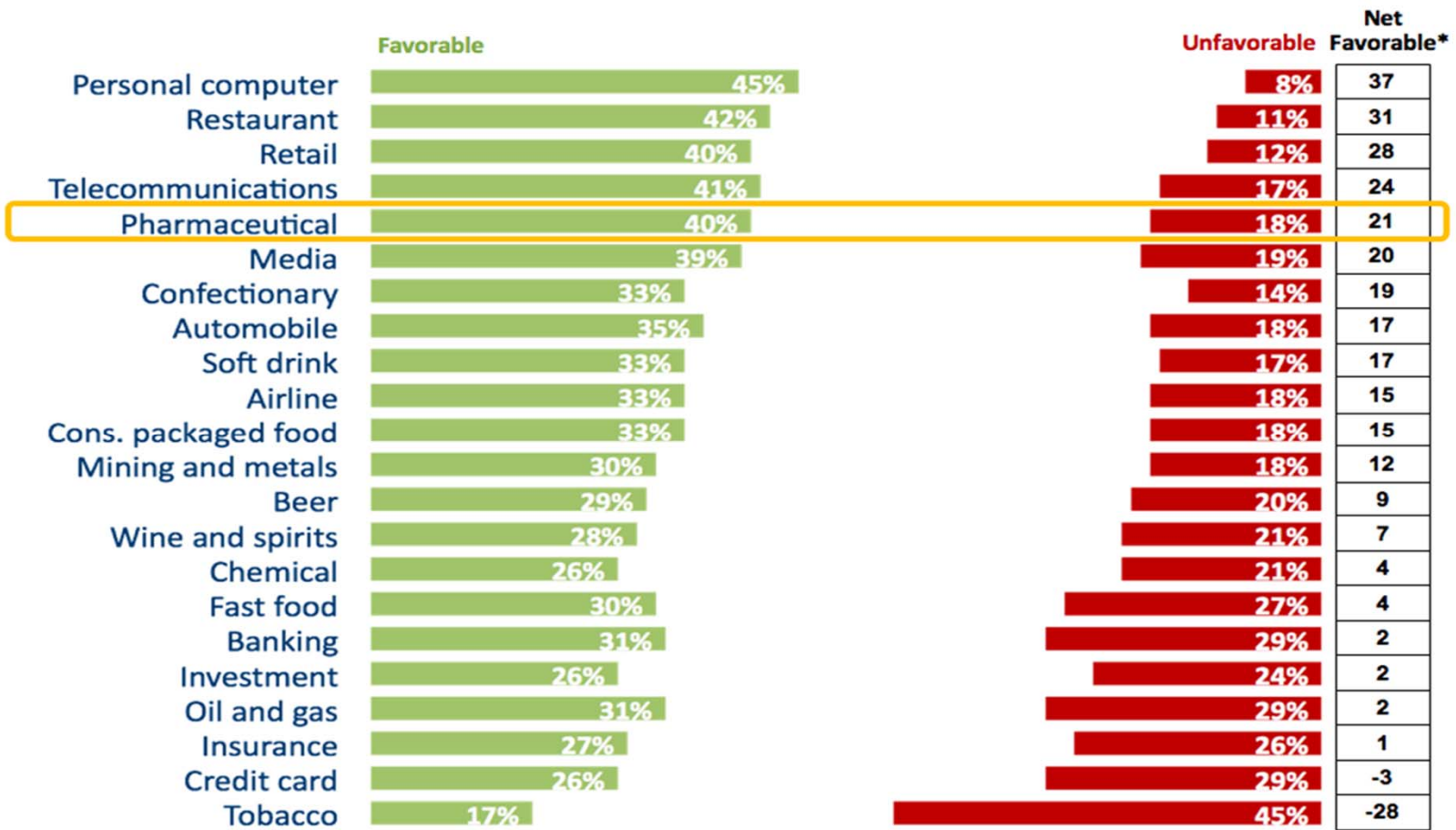
Sources of competitiveness: points and dynamics



We live in an era of pharma public private partnerships

- Europe has many innovative science, technology and product development partnerships including the IMI and a range of national government strategies and programmes
- Regulators in the US and Europe pushing forward with 'Regulatory Science' and working with the private sector to use science and patient data to improve safety, efficacy and effectiveness
- Do we also need public and private initiatives in the area of public opinion and acceptance of new technologies?
- Is this important in creating 'virtuous cycles'?

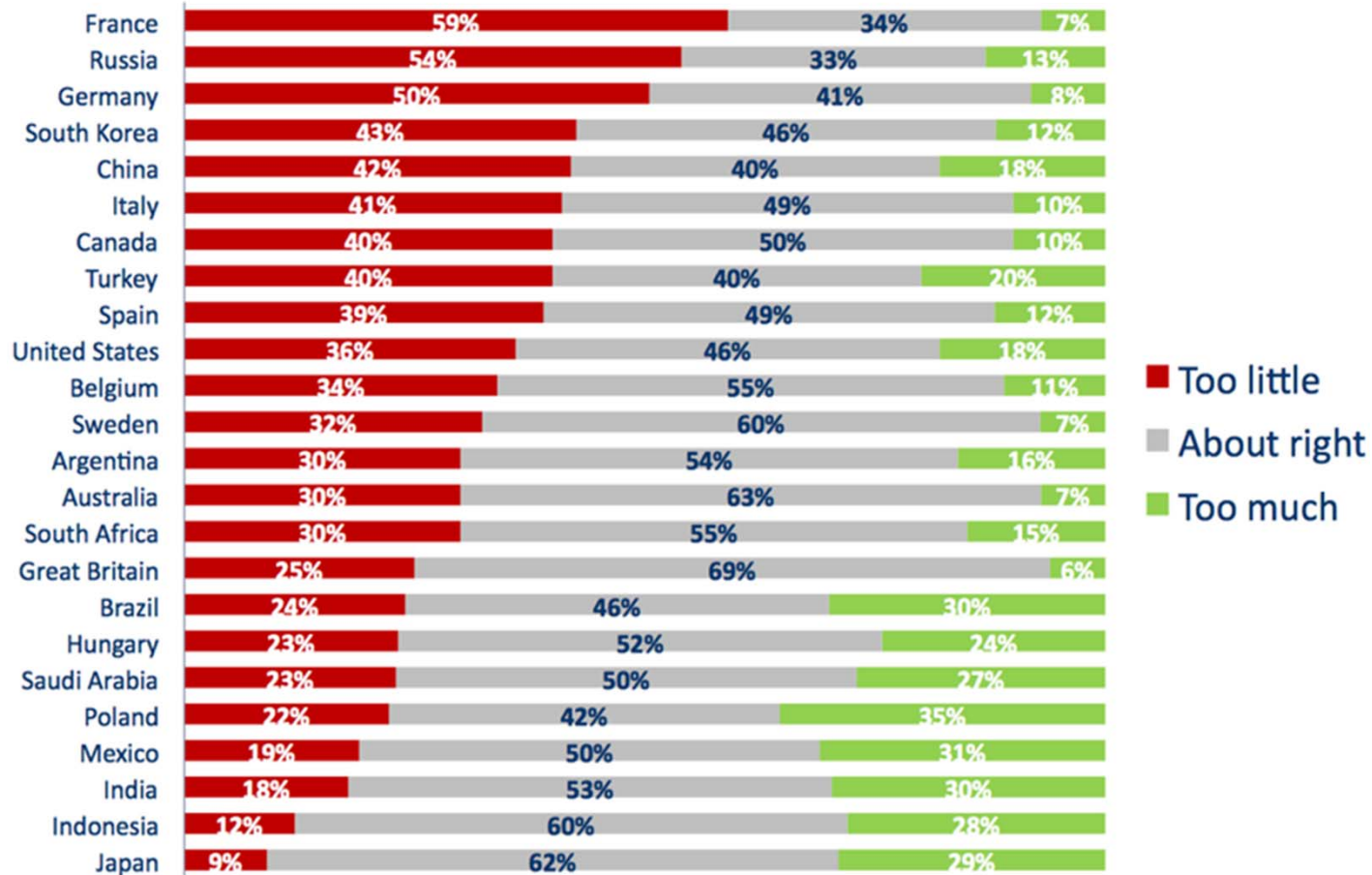
View of the Pharmaceutical Industry Among Global Consumers



*% favorable minus % unfavorable

Source: Ipsos Public Affairs (2012) Reputation Snapshot for the Pharmaceutical Sector

Attitudes Towards the Regulation of Pharmaceutical Industry



Source: Ipsos Public Affairs (2012) Reputation Snapshot for the Pharmaceutical Sector

Would increased cooperation help?

- What are the costs of negative perception to Europe?
- What might be the benefits of increased public and private sector cooperation in fostering positive attitudes?
- Do the potential risks of cooperation outweigh the potential benefits?
- How might public and private sectors best work together in this space?



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