



Executive Forecast Poland 2024: The Healthcare Agenda

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Credits: Executive Publisher: Ines Gray / Editorial Lead: Santiago Nandin /

Commercial Coordinator: Mónica Vargas Whittle / Editorial Coordinator: George Spirakis /

Editorial contribution: Mónica Vargas Whittle

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Contributors

This industry effort is the result of the time invested by executives, for executives.



Beata Karasińska
General Manager Central Eastern Europe and Israel
Baxter



Geraldine Schenk
Country Director, Poland
Johnson & Johnson Innovative Medicine



Irma Veberić
General Manager, Roche Polska
Roche



Ioana Parsons
Former General Manager, Poland
IPSEN



Harry Nardis
General Manager; Poland, Czech, Slovakia, Ukraine for Astellas
Pharma



Monique Clúa Braun
Country Manager, Poland
Novartis



Phil Krzyzek
General Manager Healthcare Poland & Managing Director Merck Sp. z o.o.
Merck



Andrzej Tarnkowski
CEO
Antar



Marcin Szumowski
Founder and CEO
Molecule



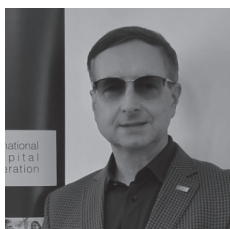
Konrad Zawadzki
Vice Director of Biological and Chemical Research Centre (CNBCh UW)
University of Warsaw



Pawel Agustyn, MD
President, Central & Eastern Europe
FUJIFILM



Prof. Jarosław Dastych
Founder and CEO
Proteon Pharmaceuticals



Jaroslaw J. Fedorowski
MD, PhD, MBA, FACP, FESC
President and CEO
Polish Hospital Federation



Krzysztof Kopeć
President of the Management Board
Medicines for Poland



Marta Winiarska
President of the Management Board
The Polish Union Of Innovative Medical Biotech Companies, BioInMed



Daniel Flis
General Manager, Poland
IQVIA



Krzysztof Lokaj
General Manager, Poland
Chiesi



Sławomir Szymankiewicz
General Manager, Poland
Haleon



Janis Meiksans
Former General Manager, Poland
Teva



Dirk Jan Paans
General Manager Poland and Head
of Management Center Eastern
Europe
Roche Diagnostics



Mariusz Olejniczak
CEO
WPD Pharmaceuticals



Rafał Szmuc
Co-Founder & COO
CliniNote



Michał Grzybowski
CEO, Poland
Philips



Michał Byliniak
Director General, Poland
INFARMA



Arkadiusz Gradkowski
CEO
Polish Chamber of Commerce of
Medical Devices
POLMED



Joanna Broy
Ecosystem Lead, Poland
EIT Health



**Lukasz Izbicki, PharmD,
PhD**
Founder and CEO
CTIN and Lekip



Prof. Maciej Krzakowski
President
Polish Society of Clinical Oncology



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Executive Summary

Poland's Healthcare Agenda, was produced by Executive Forecast following insightful conversations with key opinion leaders and industry stakeholders in Poland, taking place in 2023 and 2024. We applaud the visionary leaders who are spearheading a transformative agenda, marking the start of a new era in healthcare. Their commitment ensures that healthcare remains a priority in one of Europe's 5th largest markets, and an increasingly relevant player in the industry's global map.

Seeking to showcase Poland's current landscape based on its strengths and opportunities, both as a healthcare consumer market and as a country with a solid industrial policy that fosters companies to build up on their presence. This feature draws from insightful conversations sustained with the most influential voices in Pharma, MedTech, Key Opinion Leaders, and various stakeholders. The insights and perspectives drawn from these conversations are accompanied by resources provided by IQVIA, WHO, and OECD, aiming to inspire collective action towards building a more robust and resilient healthcare ecosystem.

"I see Poland as a well-kept secret in Europe, driven by its richness and its highly skilled and purpose-driven people. I believe the country with experience substantial growth in the next decade."

– Monique Clúa, Country President, Novartis Poland.

Introduction

We made it our mission to bring relevant and first hand content on the Polish life-sciences ecosystem, and present it as a place for opportunity, innovation, progress.

With an expanding economy, a highly skilled and motivated workforce, cutting-edge research facilities, a strategic geographical location and robust infrastructure, Poland offers a unique blend of advantages that make it an attractive economy for global companies and stakeholders seeking to invest in healthcare. As political transition takes place, the newly appointed Minister Izabela Leszczyna, gives continuity to the healthcare landscape by confirming **Maciej Miłkowski**, in his position as *Undersecretary of State of the Ministry of Health of Poland*.

As we delve into Poland's healthcare & LifeSciences landscape it becomes evident that investment in the country stands as a bet on a future where innovation thrives, medical needs are met, and healthcare reaches new heights of excellence from which the rest of Europe may draw inspiration.

Some preliminary words that encompass the spirit and vision for 2024's business landscape in the Polish healthcare and pharma scene:

"We are currently in a transitional era following a recent change of government and we hope that the current administration will value continuity. The sector is currently viewing these changes as a significant opportunity due to the new legislation that complies with European law and the European Commission. This presents a chance for forward-thinking businesses like the ones we represent as we believe that, if integrated with the healthcare system and the reimbursement structure, the present administration will make investing easier, which is extremely important to us. We are excited to take advantage of these opportunities in 2024, given that industry alignment allowed positive collaboration with various businesses, and we see a favorable trend in terms of access to innovation," shares **Michał Byliniak**, *Director General, INFARMA Poland*, the Employers' Union of Innovative Pharmaceutical Companies representing leading pharmaceutical companies engaged in R&D activities and the production of innovative medicines. "I see 2024 as both a challenge and an opportunity. The Polish market is facing challenges as a result of the amendments to the reimbursement bill. These amendments have created a new situation that

manufacturers and pharmaceutical companies will have to adjust to, but stakeholders are prepared to navigate it. The first phase of these amendments came into force on November 1st, 2023. The second phase will start on the first day of 2024 and in the middle of the year. To this end we have also engaged the Ministry of Economic Development to discuss the critical medicines that are important for Poland, discussions that are also ongoing at the European level. As this list of drugs should contain the most popular and innovative drugs that must be produced in Europe, we have put Poland forward as the location where the manufacturing of critical and essential drugs could take place," shares **Krzysztof Kopeć** *President of the Management Board of Medicines for Poland*. A key institution seeking to protect the rights of domestic drug manufacturers and to represent its members before authorities at a national and international level.

"In our most recent estimate, the pharmaceutical market is expected to grow by 8 percent to 11 percent in terms of value in 2024. The volume growth will be modest, in the single digits. This is what we anticipate for the upcoming year. There are huge changes in other areas, and that will impact on the whole ecosystem and possibly our plans for the coming year. The situation is still evolving, and we are still in the early stages. However, the new government stated that healthcare will be a priority, and they intend to spend more in this area despite the current high needs of the system." Shares **Daniel Flis**, *General Manager, IQVIA Poland*

"We must dismantle the divisions within the healthcare industry to deliver sustainable healthcare in the future. As a sector, we need to collaborate to generate ideas and solutions," promotes **Prof. Jarosław J. Fedorowski**, head of the Polish Hospital Federation, a nationwide organization of employers associating over 500 hospitals from across the national territory. We express our sincere gratitude to all contributors for shaping Executive Forecast's Polish edition. Your valuable insights and expertise have enriched our publication significantly. Thank you for your dedication and commitment to excellence. We look forward to our continued collaboration.

¹ pulsmedycyny.pl (2024, March 5). Maciej Miłkowski: Polityka nie ma wpływu na moją pracę. <https://Pulsmedycyny.pl>. Retrieved March 10, 2024, from <https://pulsmedycyny.pl/maciej-milkowski-polityka-nie-ma-wplywu-na-moja-prace-1209814>

Chapter I

Healthcare Overview: A Snapshot of Poland's Health & Economics

“While acknowledging the world’s current challenges and complex geopolitical landscape in Poland, I remain positive, influenced by our overall growth and commitment to innovation and digital technologies.” Monique Clúa Braun, Country President, Novartis Poland.

Positioned as the bridge between the east and west of Europe, Poland has experienced significant changes in its healthcare system in the last decades and has shown no sign of stagnation following the election of a new, pro-EU government in 2023. With a population of around 38 million people, Poland is facing issues common to other European countries, such as an aging population, along with unique challenges and opportunities as it navigates through the intricacies of healthcare reform, both domestically and within the broader European context.

Electing Health



“The patient is at the center,” shared Minister Izabela Leszczyna regarding the advice she had received from former Minister of Health Ewa Kopacz to seek support in patient organizations and using their knowledge and experience.



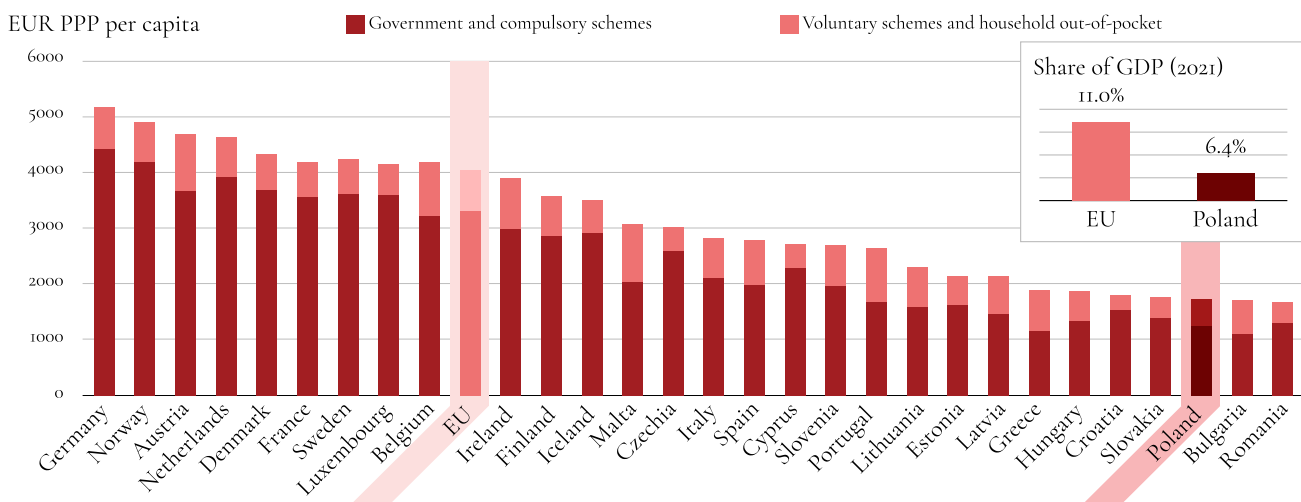
Krzysztof Kopec, President of the Management Board at Medicines for Poland, shares his insights regarding the association’s efforts to ensure stability of drug pricing and continuity of local production. Speaking on the recent election, he believes “This creates an opportunity for us because we will be able to push for provisions that can stimulate local production and improve local medicines, which is an important issue for us. Being the first time the Polish government has worked on understanding and focusing on drug security, this is a step in the right direction”. In addition to working to strengthen the local supply chain, Medicines for Poland focuses largely on working with the government around issues of interest for the sector. Citing recent amendments to reimbursement law, **Kopec** emphasizes that though “spending money on innovative drugs is necessary because patients and the market want those drugs, we have to take into account that most of population of Poland and EU is healing by generics and biosimilars. For public health, these drugs are even more important because we treat more patients with them.” Although access to biosimilars in Poland is growing, it still lags behind other EU countries, which is why Medicines for Poland is working to adjust prices so that a higher percentage of Polish patients have access to much needed medicines. Following similar objectives, **INFARMA** plays a key role in widening access to innovative medicines. As Director General, **Michał Byliniak** is optimistic

about the new government’s alignment to a wider EU approach: “As we advance the conversation with the new ministers about developments in reimbursement, we hope that the current government will value continuity. The sector is currently viewing the change in governments as a significant opportunity due to the new legislation that complies with European law and the European Commission.” Such perspectives prove the indispensable need for a cross-industry collaboration to advance the sector in the current political landscape.

As key players push for local production to increase pricing and supply chain stability, leaders have set their sights on attracting foreign investment, particularly in the area of biosimilars production, as Poland already has the production capabilities and skilled workforce to further explore this sector. **Daniel Flis**, General Manager of **IQVIA**, also shares an optimistic view regarding recent political changes: “Acknowledging the high fiscal needs of the system, the new government has stated their plan to make healthcare a priority by expanding expenditure in the sector” This goes in line with increasing costs associated with healthcare services worldwide, raising the need for strategic planning to ensure accessibility and affordability for all citizens, fueled by a high rhythm of clinical trials and innovative R&D projects.



Figure 1. Poland spends less than half the EU average on health



Note: The EU average is weighted.
Source: OECD Health Statistics 2023 (data refer to 2021, except Malta (2020)).

Investment vs. Costs: distilling health expenditure

Let's dive into one of EU's top 5 pharmaceutical markets.

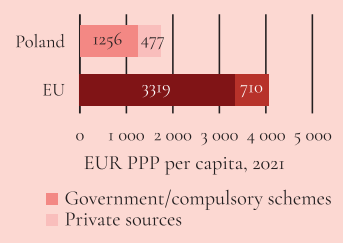
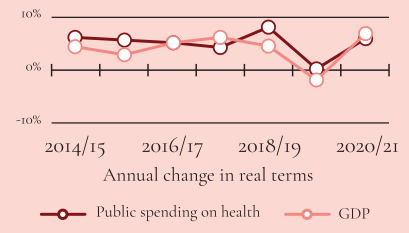
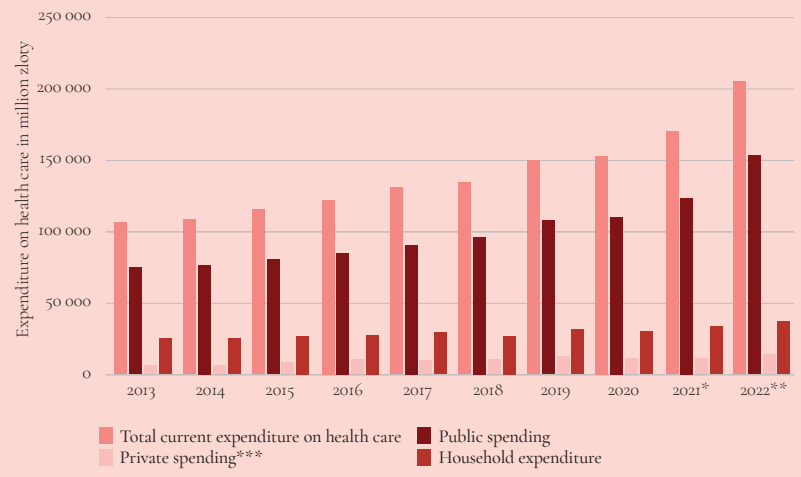


Harry Nardis, General Manager of Astellas Europe, Poland, Czech Republic, Slovakia, and Ukraine, explains his thoughts on healthcare expenditure, *“Health is not a cost; it is a societal investment because it is built for the well-being of the citizens, who then build the country's economic resilience.”* This illustration of the circular nature of the healthcare industry underscores the importance of strategic investments in Poland's healthcare system. Allocating resources to enhance medical infrastructure, research capabilities, and healthcare services not only directly benefits the citizens' health but also cultivates a resilient economic environment. A healthier population is inherently more productive, contributing to the workforce and fostering innovation. The money invested in Poland's healthcare sector serves as a catalyst for overall societal well-being, creating a positive cycle where the strengthened health of citizens becomes an asset that propels the country's economic vitality. This holistic approach recognizes healthcare as a cornerstone for building a robust and prosperous nation, and reflects the need for Poland, like all other European countries, to plan for future challenges.

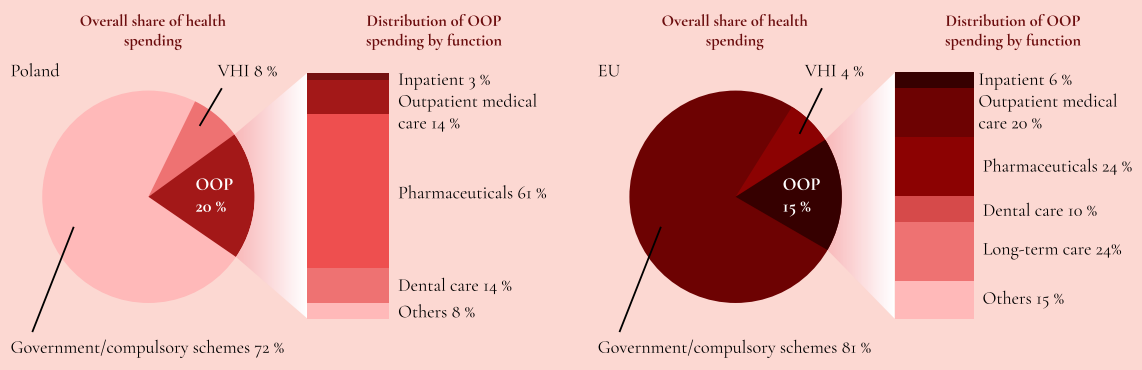
The majority of total health spending in Poland comes from public sources, with the remaining portion covered privately, mainly through out-of-pocket spending, with a significant portion directed towards medicines. The healthcare spending distribution leans towards inpatient care rather than outpatient care, with comparatively low allocations for long-term care and prevention. This funding structure has contributed to the underdevelopment of primary care in Poland, highlighting a need for a more balanced and preventive approach to healthcare.

Over the last decade, public spending on health in Poland has increased, supplemented by substantial investments earmarked in the national Recovery and Resilience Plan and the EU Cohesion Policy. These investments focus on reforming the hospital sector, developing digital health, and strengthening the health workforce. Plans also include enhancing capacity to monitor and detect potential epidemiological threats.

Expenditure on health care in Poland from 2013 to 2022 (in million zloty)



Outpatient pharmaceuticals account for nearly two thirds of out-of-pocket payments



Notes: VHI also includes other voluntary prepayment schemes. The EU average is weighted.
Sources: OECD Health Statistics 2023; Eurostat Database (data refer to 2021).

Healthcare Geopolitics

In the broader context of the European Union, Poland stands as a strategic player in Central Eastern Europe, playing a significant role in a wider dynamic. Collaborative work within the EU framework allow for the exchange of best practices, resources, and expertise. Poland's efforts in this regard contribute to the overall stability and effectiveness of healthcare systems in the region, shaping health policies and fostering a collective approach to challenges. Furthermore, its strategic location as a middle point between East and West enhances its role in influencing healthcare dynamics not only within its borders but also in the broader European landscape by acting as a hub for logistics, education, R&D, production, and legislative action.



University of Warsaw's Vicedirector of Biological and Chemical Research Centre, **Konrad Zawadzki**, sees current challenges as an opportunity for Poland to play a key role in providing medicines to neighboring countries and advancing towards self-sufficiency in times of external turmoil:

“Geopolitical turbulence, especially in Ukraine, has underscored Poland's logistical strength. Due to COVID-related supply disruptions from China, Polish government has initiated a program to manufacture antibiotics (and other important API substances) domestically” In that sense, INFARMA's Director General **Michał Byliniak** coincides in the country's ability to weather political storms and remain a dependable partner in Europe: “Despite external challenges, including geopolitical concerns, *we believe Poland's size, access to experts, and geopolitical location offer significant potential for clinical trials, shared services centers, and production.*”



As a provider of strategic data that allows for a more informed decision making, IQVIA works closely with Polish companies to ensure they play a part in building system stability across the continent. Its General Manager, **Daniel Flis**, shares a useful depiction when it comes to understanding the current landscape: “It is crucial to remember that the growth that Poland is experiencing now is occurring on a very particular foundation. First, given the high costs caused by the pandemic and subsequent post-COVID-19 infections which led to an increase in the cost of pharmaceuticals; and second, given the effects was the war in Ukraine. Over 1.7 million individuals applied for a Polish national registration number, and it is estimated that around one million individuals are permanently resident in Poland right now”. Special coverage provisions have been implemented to extend social health insurance to Ukrainian refugees, but this puts additional pressure on resources. Being the largest recipient of Ukrainian refugees since the Russian invasion in February 2022 have added strain to the Polish healthcare system, yet also come to show the leading role the country has played in this regard.



Arkadiusz Gradkowski, CEO of Polmed - Polish Chamber of Commerce of Medical Devices -, lends his expert opinion as to manufacturing: “Considering our geographic location, with Ukraine as our neighbor, we receive numerous inquiries, making Poland an ideal hub for manufacturing and distribu-



ting devices globally. Some major companies are already investing in manufacturing here, capitalizing on our strategic position”.

As a neighbor to the largest war to hit Europe since World War II, Poland has become a close ally to Ukraine, with whom it shares a more than 500-kilometer border. These MedTech leaders are committed to helping Ukraine, underscoring the power of the Polish economy and the willingness of the Polish people to lend a hand to those in need.

Companies like **Baxter** have taken up a responsibility to act as a beacon of example amidst uncertain times. **Beata Karasinska**, General Manager for Central Eastern Europe and Israel says “The idea to support Ukrainian doctors came from our people. Ukraine is hit by rockets every day, 200 hospitals have been destroyed fully, and more than 1500 hospitals and clinics have been damaged. We saw the conditions in which Ukrainian doctors must work daily, how many patients they have, and what challenges they face. We decided to help them from our stand, giving them mental support, training them, and letting them know they are not alone.”



Poland's MedTech industry is not only contributing to healthcare advancements but also creating economic opportunities and aiding its neighbors in their own struggle for adequate healthcare. The country's trajectory of growth and innovation, supported by a booming industry, a strong educational foundation, and a focus on digital health solutions, positions it as a significant player in the global MedTech landscape. **Paweł Augustyn**, President of Central & Eastern Europe for **FUJIFILM** express a sentiment that is transversal to the sector: “*I am proud that we opened our public healthcare and educational systems to the roughly 2.5 million migrants who were fleeing from Ukraine since last year, and our economy stayed growing.*”



As Poland continues to evolve as a healthcare hub and grapple with geopolitical disturbances and demographic shifts, the need for resilient and sustainable structures becomes paramount. Balancing accessibility, quality, and affordability is essential to ensure the well-being of the population. The country's KOLs perspectives address the complexities of this transformative period, reflect a commitment to the future, and display to the broader European healthcare community that Poland will play a pivotal role in the future of the industry on the European continent.

People, People, People

Knowledge stock: “inclusivity, resilience, and collaborative planning”. Capitalizing on a highly skilled talent pool.

The intersection of healthcare workforce development and industry leadership in Poland highlights a holistic approach to shaping the future of the nation’s healthcare. Leaders in the pharmaceutical, MedTech, and hospital industries emphasize the value of diversity, culture, and adaptability in attracting and retaining talent. These align seamlessly with Poland’s broader healthcare goals, emphasizing inclusivity, resilience, and collaborative planning. Listening to the key leaders driving the industry, we explore the country’s healthcare workforce, focusing on recent advancements, challenges, and collaborative efforts shaping the nation’s healthcare landscape.

“The country boasts a dynamic pool of young, well-educated individuals proficient in foreign languages. This stems from historical resilience, fostering a creative problem-solving mindset. Polish employees are widely recognized across countries, bringing international experience and a valuable perspective to their roles,” points out **Slawomir Szymankiewicz**, General Manager, Haleon Poland.



Poland’s healthcare system, though facing similar challenges as other nations, is positioned for positive transformations, bolstered by strategic investments and a commitment to advancement outlined in the National Recovery and Resilience Plan. In 2020, despite economic setbacks rooted in the COVID-19 pandemic, the nation rebounded, and the commitment to healthcare was reinforced, outlining substantial investments in hospital reform, digital health, and healthcare workforce strengthening.



General Manager, Poland, Czech, Slovakia, Ukraine for Astellas Pharma, **Harry Nardis**, emphasizes the importance of values in attracting and retaining talent, stating the importance of counting on a team whose values are aligned with the intrinsic purpose of the company’s DNA: “It is important to be consistent with these values daily and make decisions that prove you believe in them. That is the only way people can connect, engage, and be passionate about their actions. *How do you keep your people connected to the company? One common goal, one common passion*”. Efforts to attract and retain skilled professionals, particularly remote workers in rural areas, contribute to a more balanced healthcare landscape.



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Working together, we can reimagine medicine to improve and extend people’s lives.





While some executives prioritize remote or hybrid work to attract workers located outside of capital cities, others state that reorganizing their footprint may be a solution. **Janis Meiksans**, former General Manager for Teva Poland shares his thoughts on finding a middle-ground with skilled employees, *“Placing functions where the talent resides, even if it means establishing operations in different cities or moving positions, has proven successful for us in Teva. To attract exceptional specialists in their fields, we align our approach with their needs.”* Initiatives like these improve Teva’s ability to source talent and meet the needs of employees but also minimize regional disparities in healthcare access and reduce wait times for specialist consultations.



Beata Karasinska, General Manager Central Eastern Europe & Israel at Baxter, explains how her company turns challenges of a multilingual and multidisciplinary team into opportunities through their hiring process and talent selection criteria: *“Our onboarding process is never in Polish because there is always at least one person who does not speak Polish. This fosters an inclusive spirit: everything starts with the recruitment process”. Seeking to foster a group of talented individuals that reflect the inclusivity they wish to procure, Karasinska adds “We want to have a diverse team. People in top leadership positions understand that a diverse group leads to better outcomes. Our gender ratio is almost 50/50; there are slightly more females than males, which is also seen in leadership positions. I am a woman, and the director of shared services is also a woman. The signal comes from the top.”*

Furthermore, while each employer has a different strategy for attracting and retaining talent in this competitive market, Baxter leverages talent by providing their collaborators with multiple opportunities for growth in a horizontal hierarchy: *“At Baxter, development does not necessarily mean going up; it can also mean remaining at the same level but doing something different. That is because you need experience in various fields to grab opportunities. If you come from finance and have never done anything but finance, you cannot reach positions at the C level. If you have experience in finance, HR, and marketing, you have three different possibilities to get the C level. This is why we have Baxter Academy and sponsor external courses with universities. We promote English lessons since that is the language of business. We do the right things, and we do it consistently.”* Employees at Baxter are encouraged to speak up, Beata says, to identify their needs and learn about their professional goals.



Roche Polska’s General Manager, **Irma Veberič**, is proud of both the flexible work schemes that the company provides, as well as those initiatives that facilitate workers’ transitions into new fields: *“Our flexible location policy enables employees to work from anywhere in European Union for up to three months or up to 10 days from other locations if their schedules allow.”* Irma says that Roche organizes mentorship programs for teens, as well as for mothers. *“We launched the second edition of Destination IT program in cooperation with Working Mom Foundation in October. This initiative helps moms from other industries transition into IT through mentorship. It’s a distinctive program, and from the first edition, we’ve already welcomed three young mothers as employees who decided to join Roche.”*

Executive **Veberič** goes on to emphasize the importance of balancing financial incentives and employee well-being when attracting and retaining talent: *“Regarding employee attraction, we’re diligently enhancing our branding. It’s not just about salaries but also about fostering a positive work environment. A smile on our employees’ faces and regular meetings with various staff members, where we discuss multiple topics, fuel my drive to ensure a happy and motivated workforce.”* These approach aims to recognize the importance of a content and motivated workforce.

Poland’s optimistic outlook on challenges is grounded in strategic investments in talent, a commitment to workforce development through education, and a positive, holistic approach to healthcare challenges which puts the human, either patient or professional, at the center and responsible for the industry’s success. Merck’s General Manager of Healthcare in Poland, **Phil Krzyzek**, emphasizes the importance of a positive work environment and content staff, stating, *“There is a genuine and consistent commitment to drive the business but also to develop employees and provide a great place to work where people can be themselves and feel great satisfaction in their work.”* By addressing challenges, leveraging innovation, and fostering collaboration, Poland is crafting a healthcare landscape that not only meets the demands of the present but also anticipates the needs of healthcare professionals in the future. Efforts to strengthen primary care, address behavioral and environmental risk factors, and invest in the healthcare workforce are crucial for improving overall health outcomes. The lessons learned by the COVID-19 pandemic, coupled with long-term strategic investments, will play a pivotal role in shaping the future of healthcare in Poland.



Ageing population: a shift to prevention

Like many European nations, the proportion of elderly citizens is rising. While longer life expectancy is proof of advancements in healthcare and quality of life, it also places additional strains on healthcare resources, requiring a proactive approach to address age-related health issues, and a stronger position on preventative medicine and healthy lifestyle changes.



“These trends are like those of other Western European countries. We need to adjust the existing system to the new challenges,” shared **Krzysztof Lokaj**, General Manager, Chiesi Poland. As population increases and ages, there is an imminent need to increase healthcare expenditure.

This challenge does not only impact necessary healthcare spending, but also poses the question of who will be there to take care of our elderly population. With the current low birth-rates, it is most important to increase the attractiveness of the healthcare sector. Countries like Poland face a substantial challenge when



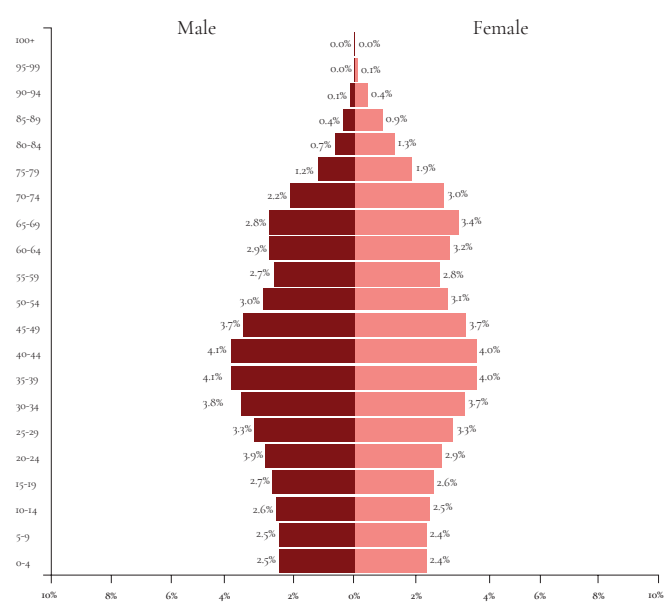
it comes to the ageing of healthcare practitioners, which in return makes educating new talent ever more important. As **Michał Grzybowski**, CEO of Philips Poland points out, “55% of healthcare personnel in Poland are over fifty years old”.

Proposed increases in healthcare spending present themselves as the necessary fuel to drive the further education of future professionals, the opening of new healthcare facilities to house and train them and maximize patient well-being.

Akin to many European nations, Poland grapples with the profound impact of an aging populace. Poland has experienced a demographic shift towards an older population over the past two decades, with the proportion of people aged 65 and over rising from 12 % in 2000 to 18 % in 2020 – a lower share than the EU average of 21%. However, this share is projected to increase rapidly to 30 % by 2050 – the same as the EU average.



Dirk-Jan Paans, General Manager at Roche Diagnostics, articulates this challenge, stating, “we must face the challenge of an aging population and growing healthcare demand. Although there is plenty that we still need to work on and enhance, we are well-positioned to do so.” This demographic shift necessitates a restructuring of healthcare paradigms to address the specific needs of an older demographic. Proposing such a proactive approach to healthcare raises some questions, such as the average person’s ability to access these services and take advantage of a preventative approach. Regarding access, **Dirk** says, “We now consider “access” more holistically. For a patient to go from recognizing a symptom to being, ideally, cured and healthy, there are several steps to be taken. These can include things like seeing a healthcare

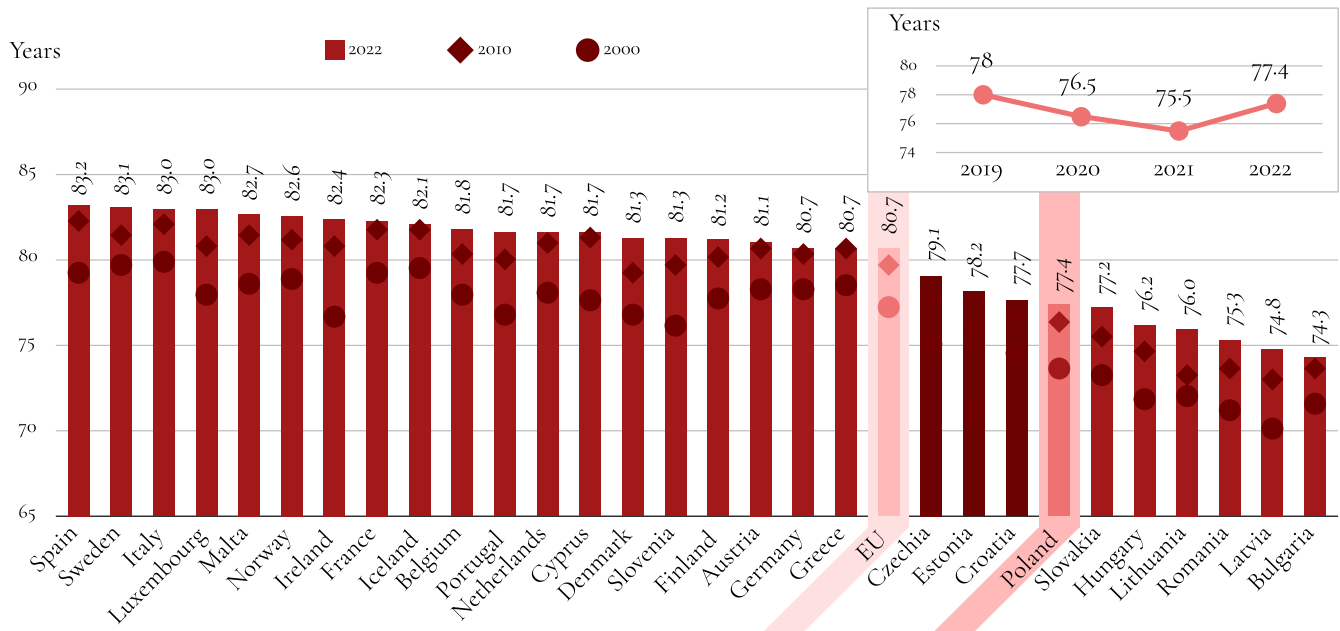


Demographic factors	Poland	EU
Population size	37 654 247	446 735 291
Share of population over age 65 (%)	19.1	21.1
Fertility rate ¹ (2021)	1.3	1.5
Socioeconomic factors		
GDP per capita (EUR PPP ²)	28 044	35 219
Relative poverty rate ³ (%)	13.7	16.5
Unemployment rate ³ (%)	2.9	6.2

1. Number of children born per woman aged 15-49. 2. Purchasing power parity (PPP) is defined as the rate of currency conversion that equalizes the purchasing power of different currencies by eliminating the differences in price levels between countries. 3. Percentage of persons living with less than 60 % of median equivalised disposable income. Source: Eurostat Database.

Source: Population Pyramid. (n.d.). Poland 2023. <https://www.populationpyramid.net/poland/2023/>

Life expectancy at birth in Poland is approximately three years below the EU average



Note: The EU average is weighted. The 2022 data are provisional estimates from Eurostat that may be different from national data and may be subject to revision. Data for Ireland refers to 2021.
Source: Eurostat Database.

professional, being referred to a specialist, undergoing diagnostic testing, receiving treatments, being monitored during the treatment process, etc. *When we consider access, we consider each stage of the process and acknowledge that the best possible outcome will not materialize if the process gets interrupted or is too slow.*

While the topic of access may pose a number of economic or logistical challenges, there is no question as to the willingness of the Polish population to become proactive in the management of their own health, as stated by **Mariusz Olejniczak** of WPD Pharmaceuticals. He notes the Poles' proactive approach, which underscores a growing awareness of health matters among the populace. *"People in Poland actively search the internet for diagnoses, particularly when dealing with chronic conditions. Polish patients take an active role in improving their health."*



Changing demographics

Polish healthcare system has undergone notable shifts and challenges, particularly in the wake of the COVID-19 pandemic. The impact of the pandemic on mortality in Poland was significant, leading to a decline in life expectancy at birth by 2.5 years between 2019 and 2021. However, a positive reversal in this trend occurred, with life expectan-

tancy improving to 77.4 years in 2022. This improvement may indicate the resilience of the healthcare system. Behavioral and environmental factors play a substantial role in mortality, with tobacco smoking and poor diet being major contributors. The high and increasing rates of obesity among young people pose additional public health concerns. Addressing these risk factors is crucial for improving overall health outcomes in the country, and it is for this reason that many healthcare industry leaders are changing from a treatment-focused, reactionary approach to a more preventative model. *"People can prevent a lot of diseases on their own by changing their diet and habits. Society is moving in this direction, and we are following suit by avoiding obesity, avoiding diabetes, and increasing physical activity."* - **Paweł Augustyn**, MD - President, Central & Eastern Europe, FUJIFILM



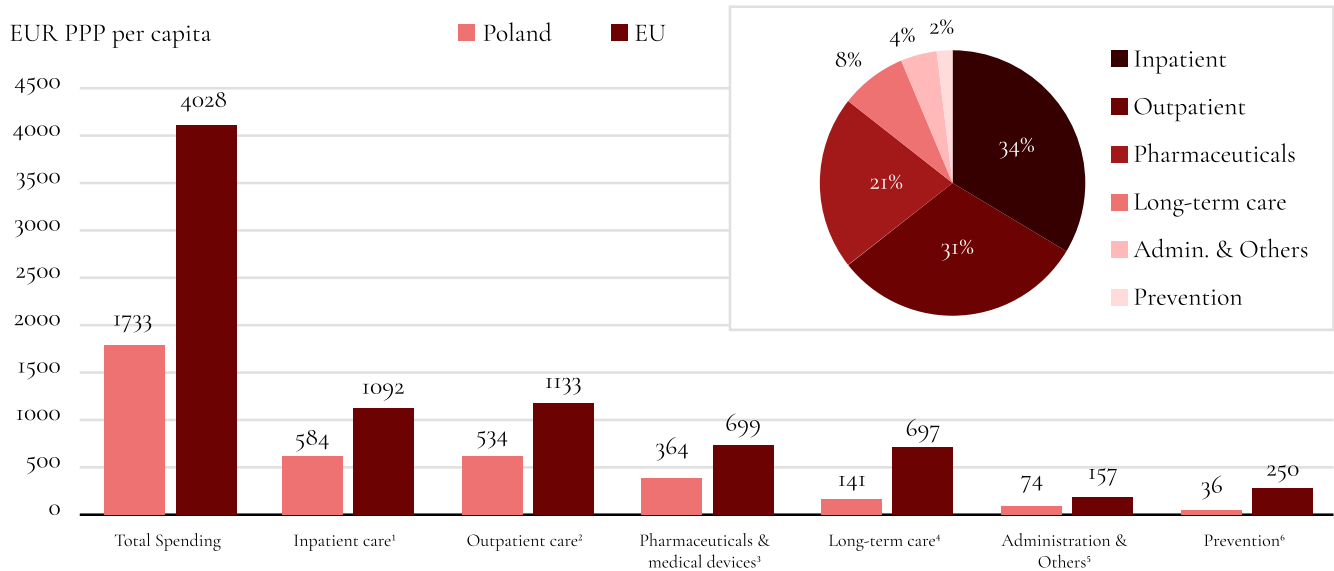
In light of data, the health system's ability to prevent and treat diseases reveals weaknesses, with persistently high preventable mortality rates compared to the EU average. Progress in reducing mortality from treatable causes has stagnated or regressed since 2014. Immunization and screening data are incomplete, but there are indications of worsening rates in some areas. High rates of avoidable hospital admissions for common chronic conditions suggest shortcomings in outpatient care provision.

On the other hand, Poland's relatively small income inequality gap has positively influenced its healthcare system. With a more equitable distribution of wealth, access to healthcare services becomes more widespread, ensuring that a larger segment of the population can afford and receive necessary medical care. The reduced income disparity supports a sense of social solidarity, fostering a healthcare system where the benefits of preventive measures and early interventions are accessible to a broader spectrum of society. Ultimately,

Poland's smaller income inequality gap acts as a facilitator for a more inclusive and effective healthcare system, promoting better health outcomes for its citizens.

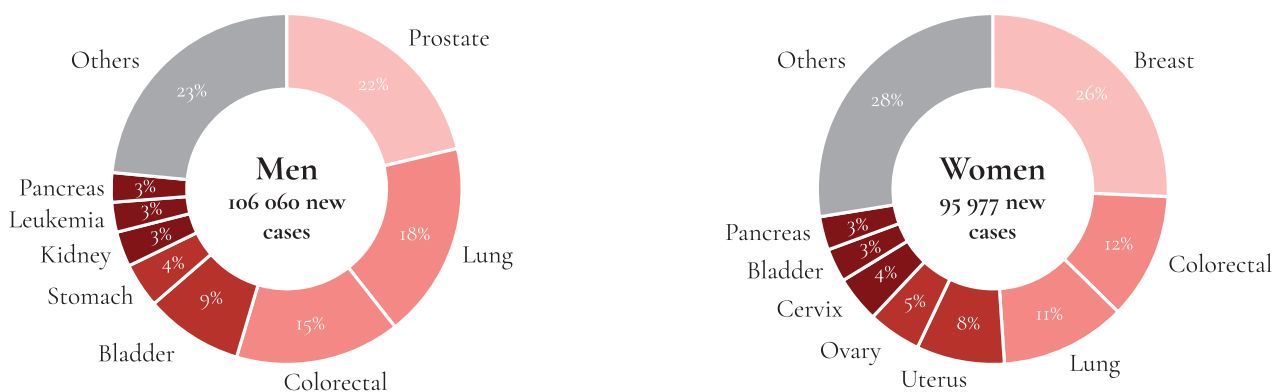
Furthermore, statistics show that Poland still has a younger than average population and low incidences of poverty and unemployment, lending credibility to claims that Poland is poised to contribute to building a bigger and better healthcare infrastructure that Europe can depend on.

The shares of funding dedicated to long-term care and prevention are relatively low



Note: 1. Includes curative-rehabilitative care in hospital and other settings; 2. Includes home care and ancillary services (e.g. patient transportation); 3. Includes only the outpatient market; 4. Includes only the health component; 5. Includes health system governance and administration and other spending; 6. Includes only spending for organized prevention programmes. The Eu average is weighted. Sources: OECD Health Statistics 2023 (data refer to 2021, except Malta (2020)).

An estimated 202000 people in Poland were expected to be diagnosed with cancer in 2022

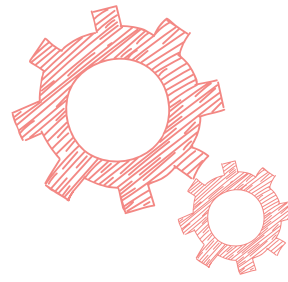


Age-standardised rate (all cancer): 696 per 100 000 population
EU average: 648 per 100 000 population

Age-standardised rate (all cancer): 458 per 100 000 population
EU average: 488 per 100 000 population

Notes: Non-melanoma skin cancer is excluded; uterus cancer does not include cancer of the cervix. Source: ECIS - European Cancer Information System.

Five Trends to Watch



The Polish healthcare system is undergoing a period of transformation. This article explores five key trends that are shaping the future of medical care in Poland. We'll delve into areas like technology advancements, patient empowerment, and approaches to delivering healthcare services.



1 Changes in Drug Reimbursement

Drug reimbursement is currently a widely discussed topic in Poland due to its significant impact on access and healthcare affordability. The reimbursement system plays a crucial role in determining which medications are available to patients at an affordable cost, as it influences both the availability of drugs in the market and the financial burden on patients and the healthcare system. As Poland's healthcare relies heavily on public funding, decisions regarding reimbursement directly affect the allocation of public funds, requiring a balance between providing access to innovative treatments while controlling healthcare costs and ensuring system sustainability, a situation which often leads to debates about which treatments should be reimbursed and under what conditions. The



process of seeking reimbursement requires complex regulatory procedures, a process which many say is too slow when compared to neighboring countries. **Cristiano Costanzo**, VP & General Manager, GSK in Poland shares his view on the current state of reimbursement, calling for adaptations to the existing framework: **"The current 827 days from drug registration to reimbursement listing is untenable for improving healthcare outcomes. Poland lags significantly behind its EU counterparts, with Germany and Austria boasting much shorter timelines of 120 and 300 days, respectively. Such delays are particularly egregious in critical areas like oncology and infectious diseases, prompting patients to seek treatment abroad. We need to encourage dialogues with institutions to underscore the necessity of investment in innovation while addressing these challenges."**



Roche Polska's GM **Irma Veberić** agrees that while sometimes reimbursement comes faster than expected, the long wait times are issues which top the list of things that pharmaceutical companies wish to improve. "One of the main challenges in Poland is late product reimbursement, the average from W.A.I.T. report shows it's almost 844 days, while German patients wait only 133 days."



2 Increasing Local Production

Advanced technology which allows us to leverage our interconnected society to form international supply chains is one of our globalized times main assets, allowing us to reduce costs for the system and improve access to certain mass-produced commodities. That being said, an equilibrium must be attained between international cooperation and national self-sufficiency. As **Konrad Zawadzki**, University of Warsaw's Vice Director of the Biological and Chemical Research Centre states, destabilizing events occurring outside of Poland have had a profound impact on supply chain stability. He and many others are calling for increased local production to mitigate the negative consequences of such events. "Politically, post-election changes in Poland appear to position the country favorably within the European Union. *Geopolitical turbulence, especially in Ukraine, has underscored Poland's logistical strength. Due to COVID-related supply disruptions from China, the Polish government has initiated a program to manufacture antibiotics (and other important API substances) domestically.* Companies like Polfa Tarchomin, a state-owned company, play a crucial role in this context, displaying Poland's viability for investment."



This sentiment is not only present in academia, but in some of the largest companies which have chosen to invest in the success and continuance of Poland's healthcare system. "In Teva we are also proud to produce API within Europe, providing the region with self-reliance and maximizing security of supply." - **Janis Meiksans** – Former General Manager, Teva Poland.





3 Proliferation of Shared Services

Poland has in recent years become a top destination for multinational companies seeking to establish shared services hubs. *"This is because Poland offers exceptional access to talent, language proficiency, and a highly qualified technical workforce,"* according to Merck's **Phil Krzyzek**, who explained that Merck operates one of their three global shared services centers in the city of Wrocław.



Astellas' **Harry Nardis** has a similar view while his company's trust Poland as a hub for all of their activities in Eastern Europe. "I lead a cluster affiliate covering Poland, the Czech Republic, Slovakia, and Ukraine, addressing a population of about 100 million people. *We have four office sites, and Warsaw is the central hub for our operations in all four countries. Astellas' commitment in Poland is quite large.*"



While some companies are attracted to Poland's excellent workforce, or central location bridging the gap between east and west Europe, others come with the intention of utilizing the immense wealth of patient data. "Poland serves as Roche's innovation hub, driving progress in the local market. We conduct clinical trials, harness data from 18 million people, promote app interoperability, and possess thriving IT research and development units", explains **Irma Veberić** from Roche.



This trend shows an exponential increase, as more companies decide each year to invest in Poland as a base of operations and a shared services hub, leveraging the unique characteristics present in the country to both strengthen individual business performance and empower the local economy to continue its track of sustainable growth. "For 45 years, we have been increasing our commitment to Poland. Our substantial investments have been instrumental in bolstering the local economy. *Poland is a strategic location for key global functions such as technology, HR, procurement, and finance, with our international R&D team focused primarily on clinical operations, witnessing a threefold expansion in the past two years from 200 to 600 professionals.*" - **Cristiano Costanzo**, GSK



4 Volume vs Value

As detailed by IQVIA Poland's **Daniel Flis**, "In our most recent estimate, the pharmaceutical market is expected to increase by 8 percent to 11 percent in terms of value in 2024. The



volume growth will be modest, in the single digits." His sentiment reflects that of many key opinion leaders, who point toward a shift away from purely high-volume production as the major contributor to system growth, towards a new paradigm where the inherent value of what the country produces is prioritized by the industry and government. A similar situation can be seen in other geographies where countries such as India, which have historically been known as mass-scale producers of raw materials and API, are now investing more in R&D and the acquisition of more advanced technologies with the aim of enriching their sector by shifting away from volume and moving towards more valuable investments. **Poland, a country providing affordable cost-to-entry when compared to other western nations, will be able to leverage their established manufacturing infrastructure to ensure existing production remains stable while simultaneously investing resources and expertise gained through the COVID pandemic in initiatives which will provide added value in the future.**



5 New e-Prescriptions Regime

The Health Minister has announced changes to the issuance and implementation of annual prescriptions, as outlined in the Act of August 17, 2023, which amended the Act on the reimbursement of medicines, nutritional products, medical devices, and related legislation. Starting from March 1, 2024, a new IT system, known as the Pi system, will be in place to calculate the quantity of medication, nutritional products, or medical devices prescribed under annual e-prescriptions, which patients can obtain from pharmacies. This scheme aims to simplify the process of accurately recording dosage regimens and treatment durations for prescribers.

At the time of publication of this report, this situation is still developing, but experts point to the robustness of the Polish IT industry. INFARMA's **Michał Byliniak**, Director General in Poland, shares his predictions regarding this bold step for Poland. *"Poland's IT industry is impressive, with advancements like e-prescriptions and a fully digital banking sector. The country's strategic location, coupled with a pool of young scientists, attracts businesses."*



Central to the issue is Professor **Jarosław J. Fedorowski**, CEO of the Polish Hospital Federation, who is optimistic about the current state of E-health and E-prescriptions in Poland. *"Sustainability encompasses digital transformation. Poland has achieved several victories in digital change, exemplified by implementing the Electronic Prescription system nationwide. All patients and doctors have access to it. As a patient, I can use my phone to access my online patient account to view prescriptions. I can also go to any pharmacy that can scan the QR code on the prescription and provide me with my medication. Our goal is to incorporate that system into hospital information systems by 2024."*



Daniel Flis

General Manager
IQVIA Poland



EF: What opportunities or challenges do you see for 2024?

DF: It is crucial to remember that the growth that Poland is experiencing now is occurring on a very particular foundation. We experienced high costs caused by the pandemic and subsequent post-COVID-19 infections. This led to an increase in the cost of pharmaceuticals. The second significant effect was the war in Ukraine. Over 1.7 million individuals applied for a Polish national registration number, and it is estimated that around one million individuals are permanently resident in Poland right now. This figure was stagnant in 2023 and saw no growth. The system's customer base started to dwindle immediately thereafter. *Keeping that in mind, we need to consider the volume reduction, and all of this occurred at the same time when we were experiencing double-digit inflation across the board. In our most recent estimate, the pharmaceutical market is expected to increase by 8 percent to 11 percent in terms of value in 2024.* The volume growth will be modest, in the single digits. This is what we anticipate for the upcoming year. There are huge changes in other areas, and that will impact on the whole ecosystem and possibly our plans for the coming year. The situation is still evolving, and we are still in the early stages. *However, the new government stated that healthcare will be a priority, and they intend to spend more in this area despite the current high needs of the system. We wait to see which direction they will go.*

EF: Could you elaborate on IQVIA's footprint in Poland?

DF: Our organizational structure in Poland is diverse across six entities, collectively employing 1300 staff and several hundred contractors. Within this, 700 individuals are in clinical trials related roles, and 600 are in non-clinical positions, with 260 in the regional business unit (RBU) reporting to me. *Our global business units, housing numerous engineers, cater to both Polish and global markets, optimizing company efficiency. Poland excels in clinical trials, commanding a substantial 10 percent share globally, ranking third in patient recruitment after the US and Japan. We hold the seventh position worldwide in the number of trials conducted, reflecting a strong foundation in the clinical sector, where we anticipate further growth.* While Poland exhibits promise in clinical trials, we acknowledge a decline in such trials across Europe, contrasting with stable or growing trends in the US. This shift raises concerns about reduced access to innovative treatments in Europe. *To address this, IQVIA is proactively working to ensure Europe remains competitive. Our recent collaboration with Pratia in Poland establishes a top-tier clinical trial organization, reinforcing our commitment to advancing clinical research and maintaining competitiveness in the evolving global landscape. forward to expanding that cooperation and, as a result, expanding access to innovative treatments for Polish patients.*

EF: What initiatives may be implemented to foster greater collaboration, and are there any that could improve patient outcomes?

DF: *A fund was announced for 18 sites in Poland to create regional centers for digital medicine. The buildings at each of those sites were designed to facilitate clinical trials and broader use of secondary data (including NGS) for research, and now they want to expand. Funding for each of those sites was approximately thirty million Polish zlotys. They want to invest in a variety of fields, and the first tenders are anticipated in 2024.*

There is also a pan-European project funded by the European Research and Development Fund (ERDF) called "i3 DigiONE." We want to create a federative network of oncology sites across Europe to enhance patient outcomes based on data in one, shared OMOP model. There are two in Poland, one in Lithuania, Estonia and Czechia, and other countries. IQVIA

in Poland has been working on the Polish aspect of the project, and a Polish person is leading the implementation of that project. This has brought great pride to the company.

EF: How do you see the trends of AI and digital tools in the pharmaceutical sector in 2024?

DF: IQVIA's extensive use of AI and machine learning spans many years, with operational solutions dating back to 2013. In 2023, these technologies were deployed across more than 70 facets of our business, showcasing our commitment to innovation. Our recent introduction of IQVIA Connected Intelligence™ is just one example of ongoing AI projects, positioning us favorably for the future given our established presence in the digital landscape.

AI is a key ally in enhancing data analytics services efficiency. Our products empower businesses with predictive analytics capabilities, and we envision a future tool that proactively reaches out to patients in high-risk categories before symptoms emerge, reducing overall healthcare costs while advancing patient care. Our partnership with Apple focuses on harmonizing diverse data streams, combining information from wearables like Apple watches with clinical data to yield impactful analytics results. This synergy enables us to create a unified data pool for comprehensive insights.

EF: If you had to create a roadmap for a sustainable healthcare system in Poland for the next 10 years, what would your three base pillars be?

DF: Achieving sustainable healthcare in Poland requires strategic enhancements. Firstly, bolstering funding is paramount, as current allocations, particularly in preventative initiatives, are notably low, with only three percent designated by the National Health Fund. Emphasizing efficacy in resource utilization is crucial, shifting focus towards preventative measures over curative interventions.

Efficiency in the healthcare system stands as my second pillar. Streamlining processes is imperative, addressing instances where individuals seek medical attention for minor issues that could be managed differently.

Innovation poses a concern, especially in the prolonged duration from approval to market availability for cutting-edge treatments, a timeframe exceeding European Union averages. Public authorities must address this lag to ensure timely access to innovative therapies. While the initiation of regional centers for digital medicine is a positive step, a comprehensive approach to data and analytics integration is crucial.

“ Harmonizing various data sources will facilitate progress, and collaboration with experts experienced in systems like the NHS can expedite Poland's journey toward a more advanced healthcare infrastructure. IQVIA is poised to contribute significantly to navigating and accelerating this transformative process. ”

Michał Byliniak

Director General
Poland INFARMA



EF: Is 2024 going to be a year of opportunities or challenges?

MB: There will be opportunities and challenges in 2024. We are currently in a transitional era following a recent change of government. Some crucial positions have new occupants, while others continue to be filled by the same individuals.

As we advance the conversation with the new ministers about developments in reimbursement, we hope that the current government will value continuity. The sector is currently viewing the change in governments as a significant opportunity due to the new legislation that complies with European law, the European Commission, and the diverse methods taken to business situations.

This situation presents a chance for forward-thinking businesses like ours. We believe that the present administration will make investing easier, which is extremely important to us. That needs to be integrated with the healthcare system and the reimbursement structure. We are excited to take advantage of these opportunities in 2024.

We are uncertain about our current position regarding the NHF and federal budgets, a challenge we face this year, especially for pharmaceutical businesses reliant on reimbursement. We await developments, like the projected growth in Poland, will uplift our situation. Despite our late adoption in innovation, the previous government's wise decisions offer hope. Access lags behind the European average, posing a challenge to sustaining growth. The recovery fund's future is unclear, but we are committed to meeting requirements for its collection, albeit at a slower pace. Although concerns exist about fund diversion, utilizing it by 2026 will benefit the budget, fostering investment in innovation and healthcare, particularly in medical products.

EF: What are INFARMA's priorities for 2024?

MB: Our strategic goals revolve around three key areas. Firstly, we aim to enhance access to innovation in pharmaceuticals, covering not only reimbursement but also addressing diagnostic challenges and systemic barriers. Our focus extends beyond pharmaceuticals to encompass the entire healthcare system, ensuring a comprehensive approach.

Secondly, maintaining strong partnerships with decision-makers and the government is crucial. Collaborative efforts are essential for effective solutions, particularly in the context of upcoming presidential elections.

Thirdly, we prioritize making investments that positively impact the Polish economy. We advocate for a more inclusive approach that recognizes the value of private enterprises. We emphasize the importance of consistency and predictability in legislation, processes, and procedures rather than seeking specific financial assistance.

“Despite external challenges, including geopolitical concerns, we believe Poland's size, access to experts, and geopolitical location offer significant potential for clinical trials, shared services centers, and production.”

While acknowledging current conflicts, we anticipate improvements in our position, making Poland a safe and viable investment destination within the European Union. Our goal is to elevate discussions to the highest levels, integrating conversations beyond healthcare and development ministries to include the Prime Minister's Office.

EF: INFARMA represents 24 members. How do you balance the allocation of resources and the interests of each different member?

MB: Our members share a common focus on innovative, high-value medications with financing challenges. These pillars unite us at INFARMA, where we address system issues collaboratively. *We prioritize effective communication with the Minister of Health and the Minister of Development beyond our association, emphasizing the interconnectedness of healthcare, investments, and economics.* Recognizing innovation as an investment cost, we advocate for its inclusion in the public insurance agenda.

While we lack comprehensive digital records, efforts are underway to improve the system, and the NHF is progressing rapidly. E-prescriptions, implemented pre-COVID, demonstrate our commitment to digital solutions, though we aspire to reach the level of pioneers like Estonia in European health data.

As discussions on Brussels and the European Health Data Space unfold, we aim to initiate conversations on the national level regarding the impact of investments on healthcare. While current discussions focus on direct costs and risk-sharing, we advocate for considering indirect costs and the holistic positive impact on the system—an ongoing challenge that will gain prominence in the coming years.

EF: It will shortly be your second anniversary as INFARMA's Director. What are you going to celebrate?

Despite challenges in the pharmaceutical sector, industry alignment allowed positive collaboration with various businesses and a favorable trend in innovation access is observed and well-received by our businesses.

Key metrics, like the Access Gap poll and Polish Reimbursement Radar, offer valuable insights into Poland's pharmaceutical landscape, though reimbursement priorities remain undisclosed.

Our contributions to industry activities aim to support the pharma sector positively. Representing INFARMA, I strive to be a constructive player, and our perceived favorable industry standing is a result of my past roles in the European Union's Pharmaceutical Group, serving the interests of INFARMA and businesses in the pharmaceutical industry.

Krzysztof Kopec

President of the Management Board
Medicines for Poland



EF: As an industry expert, do you see 2024 as a challenge or an opportunity?

KK: I see 2024 as both a challenge and an opportunity. The Polish market is facing some challenges as a result of the amendments to the reimbursement bill. These amendments have created a new situation that manufacturers and pharmaceutical companies find difficult to adjust to. All the stakeholders are prepared for this new situation that they need to navigate. We want to support domestic producers, as well as international companies. The supporting measures was supposed to stimulate production in Poland, but the implementation of changes is too slow.

We recently had an election in Poland, and we are changing government. This will see a change in the Ministry of Health, responsible for drug policy, and all industry actors. This creates an opportunity for us because we will be able to push for provisions that can stimulate local production and improve local medicines, which is an important issue for us. We have put Poland forward as the location where the manufacture of critical drugs could take place.

The challenges we face in the Polish domestic sector are not as many as those in other countries that face drug shortages. Poland has emergency stocks and procedures to deal with any shortages. Poland could share some proven instruments with the European Union regarding a drug tracking system. We have a system that tracks drugs using a code. This code can be used to track the drugs from the producers to the wholesalers, and from the wholesalers to the pharmacies.

EF: What is the role of Medicines for Poland, and what are your current priorities?

KK: Our priority is to create an environment where the new amendments bring a positive impact to the producers and the patients. The environment should eliminate problems, shortages, and barriers in the way medicines are distributed.

One of the paths to reimbursement for medicines is in pharmacies when the patient is co-paying, and this is the path on which our companies are most influential. There are also drug reimbursement programs for the most innovative and expensive drugs used mostly by companies associated in the employers' union's INFARMA. This is the structure of the Polish reimbursement sector.

In the last four years, spending on new drugs and new paths of healing has increased by 100 percent on path of drug programs, from 4 billion zloty to almost 9 billion zloty. During the same period, expenditure for reimbursement in pharmacy channel increase only by half billion zloty. This is a challenge for Medicines for Poland. Spending more money on innovative drugs is perfectly fine because patients and the market want those drugs, but we have to take into account that most of the population of Poland and EU is healing by generics and biosimilars. For public health, these drugs are even more important because we treat more patients with them.

Access to biosimilars in Poland is growing. However, there are strict criteria for reimbursing drug programs involving biosimilar drugs and some limits put on the reimbursement of these drugs by pharmacies. Access to biosimilars in Poland is still several times worse than in other EU countries. Biologics take time to create, but we can expand the market for these drugs for the benefit of the patient.

EF: How does Medicines for Poland work with companies nationally and internationally to bring investments into Poland?

KK: We cooperate strictly with our members in the local and international markets to promote growth. We collaborate with our government and agencies to encourage them to invest abroad and attract investment to Poland. We discussed the importance of creating an attractive biosimilar market. We just need to cooperate with other Polish agencies to develop it. We also collaborate with biosimilar startups to create an environment that makes investing in Poland easier and more attractive. We have the capabilities and specialists for this market. I believe it is important to improve the situation.

We have had a lot of success due to the challenges we are facing, such as the draft amendments that are coming into force in 2024. Reimbursement is very important to the members of our group, and they have raised concerns about a provision that suggests that many Polish drugs in the reimbursement system must be removed from our list and no longer qualify for reimbursement.

We also highlighted the provisions about supporting domestic production. These are some of our successes. This is the first time the Polish government has worked on understanding and focusing on drug security. This is a step in the right direction, and we see this as a success.

At the European level, we contributed to creating the SPC manufacturing waiver. We were involved in the discussion with the European Parliament, which supported our statement of the importance of the SPC waiver. This was codified into law, and we believe this is important for our European manufacturers. Poland has been engaged in a re-negotiation of the reimbursement decisions every 3 years. Our company can claim success in this process because we fought the situation when they wanted to price cut our products. This was successfully rejected 2 years ago, but in 2024 will be the next negotiations with the government.

“ We have a common goal with the government - Poland's drug safety. ”

EF: Do you have any final messages for our readers?

KK: We need to have a helicopter view of the European and Polish markets because, for years, the national payers thought they could make generic and biosimilar products cheaper and cheaper.

Europe is going through some changes in healthcare. There is now a focus on medicine security because if there are no medicines, a lot of patients will die. We cannot save lives without medicines. We must look at developing something like the Semiconductors Act or the Agriculture Act on the European level. We also discussed opinions to support the medicines production in the EU. We cooperate with members of the European Parliament and for example EKES (European Economic and Social Committee), Medicines for Europe because the medicines security is important and strategic like military and energy security.

Arkadiusz Gradkowski

CEO
Polish Chamber of Commerce of Medical
Devices POLMED



EF: What are your priorities for the upcoming years? What are you focusing on as an association?

AG: Within our organization, we currently boast a membership of 110 companies, comprising 70% distributors and importers, with the remaining 30% constituting manufacturers. We need to ensure that our member companies operate in a business-friendly environment thanks to which patients and healthcare professionals have the access to medical devices needed in their therapy and work. To achieve these goals, we communicate the value of medical technologies to payers, policymakers, and society. On an everyday basis we take different actions which include, but are not limited to:

Constant cooperation with decision-makers and healthcare system key opinion leaders to ensure that the interests of MD/IVD industry are protected and looked after.

Indicating changes that need to be introduced in the Polish law and healthcare system so that both Polish patients and HCPs have a proper access to medical devices and technologies available on the market.

Participation in public consultations on draft laws that influence the functioning of the medical devices market.

Promoting the idea of medical devices being important components of patients' treatment and diagnosis and thus being key elements of healthcare systems.

In the Polish healthcare system, there are different ways of public financing for medical devices depending on the type of the product and its final user (whether these are HCPs, hospitals, laboratories or patients themselves). They can be bought in public tenders by hospitals or by patients on doctor's prescriptions. We try to provide decision makers with ideas of proper solutions for each of these MD groups.

Currently, our primary challenges revolve around solving legal issues and barriers, being the consequences of the largest amendment to the Polish Act on the Reimbursement of Medicinal Products, Foodstuffs Intended for Special Dietary Purposes and Medical Devices.

EF: How do you see the digital trends you are working on? How do you see the entire digital aspect evolving regarding AI and big data impacting your members?

AG: In Poland the number of distributors greatly outweighs the number of manufacturers. Therefore, critical decisions, especially concerning AI and sustainability, typically originate in manufacturing countries. *In our context, discussions revolve around hospitals' openness to adopting AI solutions, with a key focus on data safety. We prioritize urging the purchase of secure devices, emphasizing the importance of data safety.* Poland has a growing landscape of startups venturing into AI device manufacturing. Although the field is expanding, my knowledge of regulatory aspects is limited to distribution concerns rather than manufacturing.

EF: Could you describe Poland's medical technology offering and how innovative it is?

AG: The data regarding the number of medical devices available on the Polish market comes from the Polish database of devices, but it's crucial to note that it's a significant estimation. Over the last four years, I've been actively involved in conferences and meetings, around 40 per year.

“ I always highlight that there are approximately 300,000 registered devices and 16,000 pharmaceutical products in Poland. This diversity of devices surpasses medicinal products, showcasing innovation. The European Patent Office data show that medical technology is the second most innovative industry in Europe. ”

EF: How does Poland's medical device manufacturing sector compare to other European countries?

AG: Europe can be broadly divided into manufacturing and distribution countries. For instance, Portugal faces challenges similar to Poland's, and we fall into the distribution category. We import more medical devices than we manufacture while countries like Germany, France, Switzerland, and Spain are on the manufacturing side.

However, it should be noticed that the Polish MD manufacturing sector has grown in recent years. *There are substantially more medical technologies and devices manufactured in Poland and our manufacturers have been constantly developing new products and improving those already introduced to the market.*

Considering our geographic location, with Ukraine as our neighbor, we receive numerous inquiries, making Poland an ideal hub for manufacturing and distributing devices globally. Some major companies are already investing in manufacturing here, capitalizing on the strategic position for reaching both Ukraine and Europe. This trend is growing, with global companies opting to establish their manufacturing presence in Poland.

EF: Is prevention and early diagnosis something the industry is talking about, and is it a trend to which medical devices are moving?

AG: We acknowledge the industry's awareness, but our major hurdle is the government's reluctance to invest more in medical devices, early diagnosis and creating a proper law environment together with public financing rules around them. I've consistently emphasized that medical devices played a crucial role during COVID. Medical devices make it possible to diagnose, treat and carry out rehabilitation. Together with pharmaceuticals and doctors they are a key element of curing patients. However, we're witnessing some shift, limited to individual healthcare problems, with a recognition of the importance of devices. For example, there's a transition from diabetes strips to CGM devices, reflecting changing perspectives. *While the pharmaceutical sector is substantial, we aim to alter the government's mindset, acknowledging the importance of investing in devices for the nation's progress.*

EF: Do you have any final message for the readers?

AG: Poland is located in central Europe and this factor itself demonstrates the great potential of our country. Poland is the 5th largest country in the European Union, with population of around 37 million. Among the EU nations, Poland's economy holds the sixth position. *Poland is well known from its well-educated and hard-working labor force.*

All the above-mentioned factors make our country a good and safe place to invest and cooperate with.

Prof. Jaroslaw J. Fedorowski

MD, PhD, MBA, FACP, FESC
 President and CEO
Polish Hospital Federation



EF: Will 2024 be a year of opportunities or challenges for you?

JJF: I believe there will be more opportunities than challenges in 2024. Certain difficulties may also present opportunities. We see the upcoming year as a chance to advance hospital sustainability-related challenges. Sustainability generally refers to ESG emphasizing governance, the environment, and our social obligations. We are examining every area that is encompassed by sustainability. The Polish Hospital Federation's new vision serves as one illustration of this.

“ We must dismantle the divisions within the healthcare industry to deliver sustainable healthcare in the future. These divisions are present in the long-term care sector, hospital care, and primary care industry. As a sector, we need to collaborate to generate ideas and solutions. ”

The actual use and implementation of ideas and solutions are far more important than their existence. This is our current plan.

Last year, the Polish Hospital Federation appointed a Chief Sustainability Officer (CSO). At the World Hospital Congress held by the International Hospital Federation, we realized we were the first National Hospital Federation to have such a position. Although CSOs are present in many hospitals, the National Hospital Federation was informed that it was the first in the world to have such a role. This year, we will be looking for opportunities for our CSO as well as for the Polish Hospital Federation and the offices of so-called green hospitals.

Although Poland has a robust healthcare system, we foresee some challenges. Our primary healthcare metrics, such as hospitalizations for stroke and mortality from myocardial infarction, are reasonably decent for money we are spending. Compared to France or the rest of the OECD, we pay less—the average purchasing power is around \$4,000. We are spending roughly \$2,000. Our outcomes are not bad for that amount of money. The challenge is figuring out how to use that money next year to raise our quality—increasing quality results in improved sustainability.

A further opportunity that has emerged recently is protecting personal medical data, covered by the first GDPR code of conduct recently approved by the European Union. Our code of conduct, the first in the European Union for public and private entities, was approved by the National Office of Data Protection in Poland under the GDPR. While there were several smaller codes for private facilities like doctor's offices, we are the first to provide a code for the entire industry. In 2024, The Federation will encourage its members to sign up for this code of conduct, abide by it, and enhance it to improve the rights of patients.

Sustainability encompasses digital transformation. Poland has achieved several victories in digital change, exemplified by implementing the Electronic Prescription system nationwide. All patients and doctors have access to it. As a patient, I can use my phone to access my online patient account to view prescriptions. I can also go to any pharmacy that can scan the QR code on the prescription and provide me with my medication. Our goal is to incorporate that system into hospital information systems by 2024.

In addition, rather than replacing physicians, we are considering utilizing artificial intelligence more frequently, emphasizing augmented intelligence. We are looking at chatbots in Poland to assist us with scheduling and rescheduling meetings. Under the

guidance of the Polish Hospital Federation, we will be hosting a national campaign to highlight the use of AI.

EF: You represent more than 500 hospitals. How do you decide what the Federation should focus on next, regarding priority and balance?

JJF: Finding the ideal balance is a difficult undertaking. There are three types of members in a large organization: inactive, somewhat active, and active. The most involved members and our High Council, whose leadership roles are held by the top hospital directors in the nation, are where we acquire our ideas. We get our ideas from the best of the best.

We engage in a lot of international activities. Some of our ideas come from our international partners. If our ideas are prioritized by worldwide hospital groups such as IHF, we also make them our top priority. We believe that IHF's sustainability center is a fantastic idea. By working with international organizations, we validate our thoughts, and if we observe that they are acting similarly, we know that this is the proper project to work on.

Additionally, we have bilateral cooperation with Romanians and the German Hospital Federation. We attend the congresses and believe that the International Hospital Federation, the European Hospital Federation, and what is happening around us should be at the top of the list of priorities. We also consider the suggestions made by our members. Our Federation is keen on cross-generational cooperation. We have young people in leadership positions with the Federation. Young people submit ideas, and the board verifies them. Our decision-making process for which ideas to pursue further and which to discard is multimodal.

EF: What direction do you see the industry taking in the future? What trends do you observe in Poland?

JJF: Our industry is highly specialized. We were hailed as heroes two years ago for saving lives from COVID-19. Society now holds us to odd expectations, and we are no longer considered heroes. Following the pandemic, the quality of services has declined, and their costs have increased due to inflation. Society expects that we can increase quality at a cheaper cost. To live up to that goal, we are searching for and developing technologies such as chatbots to improve our safety, economy, and ability to support our human resources. We are looking to partner with members of society to help us achieve this initiative. Most of the world is dealing with deficiencies in healthcare staffing. Poland has a low number of nurses compared to the number of doctors. The nurse-to-doctor ratio is unhealthy. The healthcare sector has proven many times that we are the safety institutions for people in times of crisis, and we will keep on functioning as such.

We drive robotics innovation and digitalization through artificial intelligence and augmented technology, such as voice recognition software and chatbots. We must not overlook the needs of the patients in the interim. They are searching for human connection and empathy. We also consider the health of our medical personnel. That implies that hospitals will soon be more patient- and family-friendly, technologically sophisticated, and ecologically pleasant. This is what society should anticipate. More potent technology will be employed to treat illnesses. We should also clarify that hospitals are a sick person's final resort.

With the help of increasing funding and technological developments, we may anticipate performing better each year. We are expanding our financial investment in healthcare to achieve the best outcomes. At the same time, we are implementing sustainability methods to reduce our environmental impact, provide a more comfortable work and patient environment, and lower our carbon footprint.

In 2 years, when we mark 15 years of the Polish Hospital Federation, we want to celebrate the launch of Poland's new healthcare model, which is founded on value-based healthcare and may serve as an inspiration to other countries.

Professor Maciej Krzakowski

National Consultant in the Field of Clinical Oncology
President of the Polish Society of Clinical Oncology



EF: Regarding the evolution of healthcare, are you anticipating challenges or an opportunity in 2024?

MK: I will start with challenges since I firmly believe that considering the circumstances around a step forward is necessary if you wish to advance. First, there are a lot of cancer patients in our country; 180,000 people received a cancer diagnosis last year, and the annual death rate is roughly 100,000. This is the first challenge. The introduction of a comprehensive model of anti-cancer management with multidisciplinary decision-making is, in my opinion, the main challenge not only in treatment but also in the processes involved in diagnosis. Cancer patients in my country are seen by medical, surgical, and radiation oncologists, among other oncologists, but numerous additional specialists also treat them.

For instance, thoracic surgeons or chest physicians are primarily responsible for diagnosing lung cancer and continuing patient therapy. Urologists treat prostate cancer patients; however, in Poland, non-oncologists do not always embrace a multidisciplinary approach. As a result, patients with prostate cancer are often undertreated, receive only chemotherapy, and do not receive innovative new-generation hormonal or BRCA-targeted therapies. Creating a holistic care model is a challenge. In my opinion, the best approach to make things better is to establish cancer units, such as those for lung, breast, prostate, and other cancers.

An additional challenge facing the country is the need to expedite the diagnosis phase of anti-cancer management due to persistent barriers in acquiring reports such as pathology, radiology, or molecular in a reasonable time.

I believe there are numerous reasons why there are delays. First, there are far too few certified laboratories in the country, and their distribution is uneven. There are facilities with excellent access to molecular testing and centres with extremely poor access. There are only 150 medical genetics specialists in our field; some are professors and not accustomed to working at the front lines.

I mentioned a few topics regarding non-oncologists who treat a sizable number of cancer patients. Cooperation with radiation therapy specialists is necessary for an optimal outcome for patients. The fact that collaboration is not always acceptable by non-oncologists and is not always smooth or adequate presents another challenge for the country. *The relationship between applying equality control in oncology and imperative action presents another challenge. It is crucial to remember that without quality assessment, we cannot achieve the best possible outcomes. A national anti-cancer system is being proposed in my country, and effective anti-cancer measures are a key component.*

Since prevention is the most economical and effective anti-cancer measure, it presents another challenge. Currently, Poland has four screening programs in place: one for cervical cancer screening, one for breast mammography screening, one for colorectal cancer screening using a colonoscopy, and a fourth for early detection of lung cancer using low-dose computed tomography.

We need to work with oncologists because we don't have enough staff. For instance, there are 1,500 licensed medical oncologists among the 10 million people in the Czech Republic and just 1,300 among the 38 million people in Poland. As a result, we must work together while imparting knowledge on developing a comprehensive framework. *We wouldn't be able to treat every patient without medical oncologists; in Poland, for instance, there are currently 23,000 newly diagnosed cases of lung cancer; as a result, we must work with other physicians.*

EF: In Poland, how accessible are oncological medicines currently? What more needs to be done to improve access?

MK: In Poland, anti-cancer agents come in a variety of forms. Most of these agents are older and include hormone and cytotoxic agents – both are available from a so-called catalogue of anti-cancer substances. Therapeutic programs also provide anti-cancer therapy as a secondary source. Novel agents – immune checkpoint inhibitors and molecular targeted agents – are available within therapeutic programs. The Ministry of Public Health finances and reimburses them. While some of those therapeutic programs have well-equipped structures, others do not. For instance, we have access to all medications approved by science for treating melanoma, including immunotherapy and molecular targeted therapy. As such, Poland is not different, for instance, from Germany and the Netherlands.

EF: What role do you think public-private partnerships will play in improving patient outcomes in Poland, and how do you anticipate this role developing?

MK: *The private sector plays a significant role in education, not only in society at large but also in the education of specific professions like nurses, who are vital partners in the treatment of patients. Better-educated nurses help to produce better outcomes.*

EF: Since the general public is ultimately the most impacted, how can we raise awareness among them of the significance of illness prevention?

MK: Early health education about leading an ideal lifestyle is vital. Young people are the targets because, once they are aware of the issue, they may persuade their parents and grandparents about the risks associated with certain behaviours, like smoking, for example. Prevention is crucial, and early education is important at that point.

EF: We understand that your responsibility as a physician is to optimize and improve patient outcomes. What is your perspective on the funding and implementation mechanisms for new therapies like gene therapies?

MK: As soon as possible, any innovative medications, including immunotherapy and molecular targeted therapy, should be included in the radical treatment.

“ Immunotherapy and targeted therapy belong in the radical treatment group alongside radiation therapy and surgery, as well as in the future of all these novel agents. ”

Early application of innovative medicines will yield the best results.

EF: Regarding oncology in Poland, what message would you like to share with other influential opinion leaders reading this article from around Europe or the world?

MK: Provide a framework for conducting clinical trials across Europe accessible to all countries. Second, we occasionally run out of some agents. *To address this, the European Union must establish an independent system to manufacture anti-cancer agents in Europe, and all member states must be supported. It's critical to establish a shared biobank for molecular testing.* The French system for biobanking results from molecular pathology is a good example; the pan-European Biobank will be highly beneficial.

Marta Winiarska

President of the Management Board
The Polish Union Of Innovative Medical Biotech Companies, BioInMed



EF: What was the need for creating BioInMed?

MW: Poland has a long tradition of producing generic drugs. In turn, *the Polish innovative medical biotechnology sector was established about 20 years ago. It is a young, but very rapidly developing sector. The creation of BioInMed happened at a time when the market had already reached sufficient maturity and the number of companies dealing with drug discovery projects ensured that a critical mass was achieved. In Poland, biotechnology companies are working on R&D projects in the area of biological drugs, small molecule drugs and advanced therapy medicinal products (ATMP) in various therapeutic areas.*

The financial barrier to entering the biotechnology sector is high, and 20 years ago, we did not have European Union funds or grants to support innovative companies. The only companies that existed during those days were those established by founders who used their own money to invest in biotech projects.

EF: Could you elaborate on the footprint of the Biotechnology space in Poland?

MW: Some biotechnology companies arose as a response to the COVID pandemic. However, different types of biotechnology companies should be distinguished - they include innovative companies conducting R&D projects in the area of developing new drugs with their own pipelines, but also companies involved in drug discovery on request, companies developing technologies supporting R&D processes in the area of drug discovery, as well as service companies, diagnostic laboratories that provide biotechnology-based services, companies working on the so-called generics+, where the level of investment in R&D is not so high. If we include them, the number would be about 200 biotech companies.

EF: What are the priorities in BioInMed today?

MW: BioInMed has five pillars of strategy that it is currently focusing on. The first is visibility and credibility. We want to show the Polish decision-makers that the innovative part of medical biotechnology is the sector that is important for the economy and the future of patients. *Medical biotechnology will show Poland to be an innovative country with its own technologies.*

The second pillar revolves around public funding for the biotech sector. It is about grants devoted to R&D projects for drug discovery and development. *The life science industry is quite specific, and drug discovery and drug development are even more specific, so we want to teach our decision-makers and institutions about the biotech business model and how these types of projects are conducted.* Only properly aware decision-makers are able to adjust sector support tools and incentives - financial and non-financial - so that they actually have an impact on the development of the industry and the effective conduct of drug discovery and development projects.

The third pillar is about the education of investors. *It is important to educate regarding which factors are important when understanding the performance and advances of biotechnology companies. Information such as clinical and scientific data for people unrelated to the sector is sophisticated to understand.* As an organization, we want to raise awareness of investing and diversifying investors portfolios with projects from the sector. Under this pillar, we also promote the Polish biotechnology sector internationally - showing domestic companies as a valuable partner for foreign investors and business partners.

The fourth pillar concerns having the right team and locations to conduct R&D projects. In Poland, we have a long tradition of life sciences at universities, but unfortunately academic entities lack commercialization know-how. *Building a comprehensive curriculum that includes business skills is part of our points of order. In autumn 2024, we will open a joint faculty of applied biosciences at Coventry University's satellite campus in Poland.*

In our fifth pillar, we focus on stable and predictable law, among others, in the field of intellectual property, clinical trials, animal testing, as well as other regulations and provisions relevant to the biotechnology sector.

EF: What strategies do you think can be put into place to shift Poland to be a major international partner?

MW: BioInMed needs to work harder to encourage evolution and onboard our decision-makers and public institutions.

“ Polish politicians and decision-makers should be involved in promoting the innovative medical biotechnology sector abroad. Information about this industry should be included, for example, in the economic brief of the President, Prime Minister, Minister of Health, Minister of Foreign Affairs or other representatives of Poland. This promotion is extremely important because it builds awareness of Poland as an important partner. ”

Unfortunately, when you look at the McKinsey report on the biotech sector in Europe, Poland lacks projects in drug discovery and development. Why? Not because they aren't here. These projects exist, but they are not visible or discussed by people in positions of influence.

EF: Where do you see this association and the sector in five years?

MW: *I hope we will have the first innovative drug ready in five years. BioInMed member companies should also be more present in the country and the European landscape. New drug discovery companies will certainly emerge as the growing ecosystem creates opportunities for this.* I also want them to be close to American institutions that are responsible for the drug discovery and drug development sectors.

We are still working on educating our Polish decision-makers. With the first innovative drug, they will finally believe that the sector is the future of our economy. This will be a real breakthrough.

Konrad Zawadzki

Vice Director of Biological and Chemical Research Centre
University of Warsaw



EF: Can you tell us about the University of Warsaw Faculty of Medicine?

KZ: After over 70 years, Prof. Dr. Hab. Alojzy Nowak, the Rector, established the Medical Faculty, reinstating the opportunity to educate future doctors at the University of Warsaw. This move aligns with our discussion today, emphasizing the importance of multidisciplinary cooperation in medical fields for our country's strength. This new faculty positions us as a prominent medical research hub, complementing our Ochota campus's proximity to the Warsaw Medical University and many Institutes of Polish Academy of Science. Now, with our distinct entity, we are deeply engaged in healthcare and biotechnology; proudly partnering with the BioInMed association. This addition fills a crucial gap, enhancing our university's contributions to the field of life science.

EF: Can you elaborate more on your role at CNBCh UW?

KZ: We are a multidisciplinary center covering biology, chemistry, physics, and forensics—realizing that business challenges often require a mix of expertise. We have also restructured internally, establishing an R&D office within the administration, and introduced a new role in Polish academia: scientific managers. These individuals bridge the gap between science and business, a crucial role I am passionate about nurturing for the future.

We have identified four key areas for our business efforts. First up is the food sector, specifically eco-friendly food. Then, there is the medical and pharmaceutical realm, where health ties everything together. Our third focus is on catalysts and new energy sources, where biology and chemistry play crucial roles. We are closely partnered with Polish and international companies to explore these avenues. Fourth area is about environment protection and sustainable development. Additionally, we are deeply engaged with mathematicians and computer experts, leveraging AI to enhance our work in these domains.

EF: What are your current business initiatives to transfer scientific knowledge and technology into the business world? Are you working on any initiatives right now?

KZ: We have established over 100 business relations, emphasizing meaningful technology transfers. In Poland, big companies often prefer acquiring knowledge and know-how over patents. While this model might differ in the medical field, our experience with biotechnological companies and members of the BioInMed Association aligns with this approach.

In biotechnology, we engage with companies from the inception of molecules, partnering with them for various purposes, including testing in our laboratories and aiding in developing compounds. It is a win-win, addressing our financial needs while fostering strong collaboration with R&D departments.

We constantly strive to improve, acknowledging our center's budgetary challenges each year. Our center operates partly like a commercial unit, where earnings through commercialization are important. Being financially responsible is a must, making us more business oriented. Initially, Polish companies did not grasp the scientific perspective, seeking low-cost solutions. Even wealthy backers in biotech wanted quick returns, which is not feasible given the complexity of our work. Educating market on the investment required in biotechnology is crucial, something that e.g. members of BioInMed handle here in Poland. Unlike in the US, where mindsets differ, we are in an earlier stage of investing in a long-term return investment in Central Europe, facing unique challenges. A decade ago, the health tech

sector, especially biotech, was not mature, but now we are witnessing a transformation. The synergy between academia and industry has strengthened, requiring academia to offer more innovative solutions to an already brilliant workforce. We are navigating a fine balance as both sectors continue to evolve.

EF: How do you see future executive positions such as chief scientific officers (CSOs) functioning within companies, and how will universities support this position?

KZ: My scientific research revolves around this topic, and with experts from Faculty of Management and Faculty of Chemistry, I conduct training sessions for CSOs. Unlike the typical healthcare-focused MBA, we are shaping a new role in science administration. In the future, I hope to see the introduction of the Master of Science Administration degree. It is about cultivating expertise in managing innovation and growth. The role of the CSO is evolving from a rather technical focus to a strategic, business-oriented one. We have noticed a need to equip those from scientific backgrounds with management skills while also training seasoned managers in scientific principles. This new CSO drives research innovation and aligns scientific goals with business objectives. Their scientific experience helps them persuade others and facilitates relationships, often as the initial link between academia and companies. It plays an influential role in reshaping our research approach and industry collaboration.

EF: Are you currently collaborating with investors or teaching them how to invest in healthcare companies?

KZ: This part involves another university entities: the Technology and Knowledge Transfer Center and UWRC Ltd, which is the university's spin-off company. We collaborate closely, although our roles are slightly different. They handle spinoff companies and patents, while we at Biological and Chemical Research Centre often assist scientists seeking to venture into startups and create entrepreneurial ambience. One notable collaboration is with the Maj Institute of Pharmacology PAS in Krakow and the University of Warsaw, focusing on a peptide neuropathic painkiller. It is a challenging stage, typically requiring external funding, but incredibly promising. We have facilitated connections with investors, and they have secured EU funding, thus making significant strides in development. This patent-protected discovery, which has been showcased already, offers hope, particularly for chronic pain patients. At CNBCh UW we are avid supporters of human-to-human (H2H) interaction.

EF: In your experience, what would further enhance investors' interest in Poland as an investment place?

KZ: From an investor's viewpoint, perspectives vary across different scales. Politically, post-election changes in Poland appear to position the country favorably within the European Union. Geopolitical turbulence, especially in Ukraine, has underscored Poland's logistical strength. Due to COVID-related supply disruptions from China, Polish government has initiated a program to manufacture antibiotics (and other important API substances) domestically. Companies like Polfa Tarchomin, a state-owned company, play a crucial role in this context, displaying Poland's viability for investment.

Furthermore, from a scientific standpoint, Poland boasts a robust infrastructure and a rapidly growing biotech sector. We are collaborating with professionals from the United States and witnessing a surge in AI companies, focusing e.g. on solutions for cancer targeting using AI-powered protein-based trackers. This scientific growth and technological advancement offer another compelling reason to consider investing in Poland.

Joanna Broy

Ecosystem Lead
EIT Health, Poland



EF: Could you elaborate on the role of EIT Health in Poland? What environment are you creating to attract the brightest minds in Europe?

JB: EIT Health is a vast and vibrant community of world-leading health innovators backed by the European Union. Our goal is to create local ecosystems, connect partners, and make a positive impact across Europe. We collaborate across borders, linking minds from academia, business, research, Healthcare, startups, and students. *We fund projects and programs across education, innovation, and business creation, enabling the healthcare innovation needs to address challenges like aging, pandemics, and healthcare system sustainability.*

I work specifically for EIT Health InnoStars, one of the eight geographical areas of EIT Health. It covers half of Europe, including Poland, Hungary, Italy, and Portugal, and additional regions included in the EIT Regional Innovation Scheme, such as the Baltic States, Croatia, Slovakia, the Czech Republic, Slovenia, Greece, and Romania. This is a group of countries qualified by the European Innovation Scoreboard (EIS) as moderate and emerging innovators. The Polish partners represent mainly prominent medical academia and research institutions: Medical University of Lodz, Medical University of Gdansk, Warsaw University, Silesian University of Technology, Lukaszewicz Research Network - PORT Polish Center for Technology Development and Lodz University of Technology.

At InnoStars, we promote entrepreneurship, innovation, and education in Healthcare, healthy lifestyles, and active ageing to bridge the gap between innovation leaders and emerging regions.

EF: How are you helping innovators to stay, innovate, and make products within Europe? What are you currently looking for?

JB: Our key focus in EIT Health is supporting Healthcare at different stages, beginning with education. *We tackle the challenge of a shortage of healthcare workers by providing education and upskilling opportunities. We aim to scout for talent, whether healthcare providers, startups, or researchers with innovative ideas. We offer financial support and connect them with mentors, coaches, and experts.* Through different programs, we guide companies to navigate different European markets and regulations, making it easier to launch their products. We aim to offer a smooth market entry, making it more convenient for companies to thrive in Europe. We understand the complexities of rules in various European countries, and we help startups gain a soft landing by linking them to specific people and markets. With our extensive network of over 120 partners, EIT Health provides access to knowledge, finances, and markets, making it a supportive platform for companies.

EF: How does your network of different startups, multinationals, and local companies work, especially with the other initiatives you carry out?

JB: In EIT Health, we collaborate globally, engaging with people like me in various countries, not just with startups but also innovative solutions. We work closely with universities, resource centers, and industries to scout for potential products and services. Our local cooperation includes partnerships with national agencies, incubators, and accelerators. Through competitions, startups can apply for funding, mentoring, and expert access.

EF: Do you have any success stories from Poland that you can share with us? What initiatives are you working on that are a priority for this year?

JB: We prioritize engaging our partners in strategic EU-level discussions on AI, data, and the health data space. We want them actively involved, not just in calls and funds but also in shaping the future of European initiatives. We encourage partners, especially academia, to join discussions on skills, deep tech, and other vital topics.

Notably, we organized roundtable discussions focused on utilizing medical data within the scope of our contributions to the European Health Data Space initiative. The insights from these discussions will be disseminated in a comprehensive report of key findings and recommendations, ready for release at the EIT Health Summit in April 2024 in Rotterdam.

Our efforts extend to promoting these programs on a European level, helping local initiatives scale up. We're also working with national agencies and governments to boost visibility for countries like Poland, positioning them as leading hubs in innovation. We're committed to defining future skills, aiding partners in upskilling their workforce, and showcasing their potential on the European stage. We excel in supporting our partners in securing external sources of financing and integrating them into pivotal programs within the EIT Health portfolio.

“ We support entities throughout their journey, from the idea stage to hospital product validation and scaling. We offer a range of programs, from open to closed competitions, addressing different startup needs. ”

EF: What strengths do you see in the Polish stakeholders that make other countries want to collaborate with them?

JB: At EIT Health, we value collaboration and openness, especially among scientists. We're actively involved in programs like Horizon Europe to attract more funds and promote innovation. We recognize the importance of entrepreneurship and embracing collaboration, traits we could learn from the US. Our skilled workforce is strong in IT and open to testing new solutions like AI.

In Poland, we've made significant strides, particularly in fintech, and are often ahead in technology compared to other European countries. Our society is open to embracing new technologies that contribute to our advancement. There's still much to do to raise awareness and implement new technologies across industries, including Healthcare. However, our willingness to embrace innovation and our talented workforce positions us as leaders in many areas.

EF: Do you have any initiative you would like to highlight that you are doing in Poland?

JB: We've got a project called From Scientists to Innovators for Industry, teaching researchers how to transition from academia to industry. For startups, we have business creation programs helping them verify the need for their healthcare innovations and attract investments. Uvera, a Polish startup, won the EIT Health Catapult competition and gained visibility at Times Square. We create personalized journeys for startups, guiding them through various programs within EIT Health.

One success story is an EIT Health-supported startup that learned about investor pitches and later won Poland's Mother and Child Startup Challenge. We partner with this challenge, allowing startups to implement their products directly in consortium hospitals. These are just a few examples of our many activities, collaborating with partners on different levels to foster success stories.

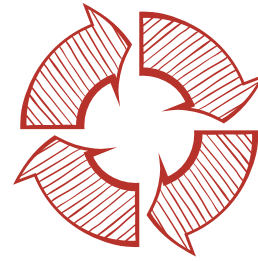
Chapter 2

Procuring Sustainability

“We believe Poland’s size, access to experts, and geopolitical location offer significant potential for clinical trials, shared services centers, and production.”
Michal Byliniak - Director General, INFARMA, Poland

Poland’s promising future is an evolving, rapidly-growing hub for sustainable innovation, driven by passionate leaders who celebrate team successes and inspire groundbreaking advancements. By spotlighting key initiatives and visionary approaches, we reveal how Poland is poised to become a long-term global partner of choice in sustainable practices and forward-thinking healthcare solutions.

Sustainable market strategies



As the landscape of healthcare in Poland undergoes transformative changes, industry leaders are basing their roadmap on a vision rooted in long term sustainability. From innovation to social responsibility, and from patient-centric care to corporate governance, these pillars are paving the way for a more resilient and impactful system.

The vision unveiled by these executives goes beyond simple business strategies; it represents a commitment to the Polish population. The journey towards this vision is characterized by adaptability, a holistic understanding of success, and a recognition that sustainability is not a destination, but an ongoing, collective effort necessary for a continuously growing and evolving ecosystem. In this new era of healthcare, the Polish industry stands ready to build an industry that not only responds to the challenges of today, but also lays the groundwork for a healthier and more sustainable future.

highlighting the unique considerations driving the healthcare market in the country.

“When shaping a sustainable my first pillar would be innovation; my second would be competitive pricing, i.e., affordability, an especially important factor in Poland, and my third would be quality and design: a smart product. Price is important in Poland, whereas, in other countries, more attention is paid to quality and design. In Poland, innovation is important; people like new products, and when we launch new products, they go to market faster, but they have to have an attractive price.” Speaking on new products that Antar is designing, Andrzej says, “We want them to be visually appealing, but price is always the deciding factor, so we aim to create something attractive and affordable.”

As part of the backbone of designing sustainable healthcare strategies and models, investment in prevention seems to be at the core of the decisions. Daniel Flis, General Manager at IQVIA Poland, stresses the importance of a preventative model over a reactionary, treatment-based approach as the means to a clear end: improving access for the Polish population. “Firstly, bolstering funding is paramount, as current allocations, particularly in preventative initiatives, are notably low, with only three percent designated by the National Health Fund. Emphasizing efficacy in resource utilization is crucial, shifting focus towards preventative measures over curative interventions”.



Patient Centricity



“As healthcare and the healthcare system are changing, we are adapting our organization accordingly. In our efforts to be more customer- and patient centric and to act faster, we have changed our ways of working here in Poland over the recent years. Looking at our local organization, we have created a set-up which drives more cross-functional collaboration and a focus on customer experience and outcomes. This has come with a stronger empowerment of teams and less hierarchy to allow for faster decision-making and action. We are confident that this will make us an even better partner to customers and healthcare system stakeholders in the future as we aim to continuously elevate company -- and healthcare standards.” Shares Dirk-Jan Paans on Roche Diagnostics’ commitment to making modern diagnostics more accessible to Polish patients. The transformation of the organization to be more customer- and patient-centric reflects Roche Diagnostics’ adaptability in shaping solutions for the evolving healthcare system.



Phil Krzyzek, General Manager Healthcare Poland & Managing Director at Merck, advocates for an increased focus on patients as the primary pillar.

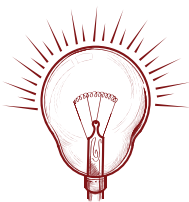


“My first pillar would be to have a disciplined, dedicated focus on patients. We need to fully understand patients’ issues and challenges and design healthcare around them to optimize outcomes in the most cost-effective way.”



Krzysztof Lokaj, General Manager at Chiesi Poland, unfolds a narrative where the needs of the patient are woven into the fabric of operations “Focusing on the patient is the first pillar

Innovation: Catalyst for Progress



Geraldine Schenk, Country Director at Johnson & Johnson Innovative Medicines, emphasizes the commitment to continuous innovation and articulates a multi-faceted approach, ranging from introducing innovative treatments to fostering an environment that attracts and empowers pharmaceutical talent.



“Firstly, we pledge to continuously bring innovative treatments to our patients in Poland, refusing to settle for anything less. Secondly, we spearhead discussions to accelerate market access and advocate for value-based healthcare that grants patients access to innovative health solutions. Lastly, and perhaps most crucially, our people. We aim not only to become an employer of choice in the pharmaceutical industry but to be among the most attractive related to learning, growth and career opportunities, empowerment, and attractive working conditions.”



Andrzej Tarnowski, CEO of Antar Orthopedics, underlines the significance of competitive pricing and quality design. His insights reveal that in Poland, the balance between innovation and affordability holds the key to success,

towards a sustainable healthcare model. This will be focused on how we can help the patient with diagnosis, education, and better access to treatment from a specialized physician. The key is improving patient outcomes.”



Sławomir Szymankiewicz of Haleon Poland explains how the mission of Haleon aligns with that of putting patients at the center of their work by outlining a multifaceted approach to promote healthier lifestyle choices, seeking to improve the health of the Polish people while simultaneously addressing social barriers, such as those surrounding the use of dentures. “We empower individuals to overcome social challenges and reengage in normal social life, something particularly crucial for older individuals. Beyond delivering top-quality products, we are committed to fostering the well-being of the people in Poland through diverse initiatives and partnerships.”



Leaders leading Sustainability

Ioana Parsons, Former General Manager at Ipsen Poland, outlines an expansive framework encompassing a broad approach to healthcare. “Ipsen focuses on four pillars: Environment, Patients, People, and Governance. We have a framework we call “Generation Ipsen for Positive Change,” a global initiative that holds local significance. In terms of Environment, we strongly emphasize aspects like renewable energy and upgrading our vehicle fleet to respect CO₂ emission targets through hybrid vehicles, if electric-only vehicles are still impractical in some regions. In terms of Governance, we hold an ISO certification for anti-corruption management systems. We prioritize business ethics and rigorous compliance. Our CEO often talks about “mindful risk-taking,” which means we maintain the highest ethical standards while taking calculated risks and implementing necessary controls. The social aspects revolve around our people and our patients. Employee diversity is crucial to us, and we achieved gender parity in the global leadership team (our top 160 leaders) this year, a significant milestone. In Poland, more than half of the leadership team is female. We’re also a “Great Place to Work” in more than 20 countries. In Poland, we were certified as a ‘Great Place to Work’ for the first time in 2021. We repeated the success in 2022 and have recently got the news of re-certification once again, with a Trust Index that increased 5 points vs. last year and is now 89%! We also engage in corporate social responsibility activities, such as supporting orphanages, and almost all colleagues participate.”



Michał Grzybowski, CEO of Philips Poland, takes a bold stance, urging a shift in procurement practices toward prioritizing green criteria in public healthcare systems.

“Emphasizing sustainability in healthcare solutions is crucial. Unfortunately, current procurement practices in public healthcare systems prioritize cost over green criteria as legislative measures are essential to drive change in public healthcare. Philips aligns with this vision, incorporating eco-design and circular approaches. We urge

partners to uphold higher sustainability standards throughout the value chain”. **Sławomir Szymankiewicz**, General Manager at Haleon Poland, extends the conversation beyond traditional sustainability by integrating patient-centric practices with environmentally conscious initiatives.

“From this perspective, making better everyday health more sustainable is fundamental to our business. Our sustainable business approach extends to patient-centric practices, emphasizing real needs over artificially driving product demand. We prioritize responsible business by promoting drug access, health literacy, and a culture of self-care and healthy lifestyles. This approach aligns with sustainability goals, preventing overuse and misuse of drugs, which can have adverse environmental and societal effects.”

Under the leadership of **Harry Nardis**, Astellas champions the ethos of sustainable growth achieved through collective contributions. **Nardis** envisions Astellas as an active member of associations, shaping both internal and external environments. His perspective aligns with the belief that changing tomorrow requires a dual focus – internal cohesion and external advocacy for the innovative industry in Poland.



“We believe in sustainable growth within society achieved through collective contributions. Astellas aims to be an active member of associations, advocating for the role of the innovative industry in Poland and actively shaping the environment. Changing tomorrow is both internally and externally focused.”

Representing the Polish Hospital Federation, **Prof. Jarosław J. Fedorowski**, also highlights the collaborative efforts his organization is undertaking abroad. “We intend to deepen our collaboration with the International Hospital Federation’s (IHF) in which we are members. Our delegation attended the first sustainability master class held in May last year. This year, we aim to have a conference linked to the Governing Council of the International Hospital Federation meeting in Krakow, bringing together several important figures from the Central European region with the idea of hosting a demonstration of several of our sustainability-related efforts, such as digitization, green energy, and transformation.” - **Jarosław J. Fedorowski**



Collaboration: leveraging common spaces

“In Poland, trust is a key issue in such collaborations. We’re eager to participate and show what true partnership means. I dream that one day, we won’t have to talk about public-private partnerships: it will just be partnerships. Healthcare challenges can only be solved in collaboration; all stakeholders must work together.” Shares **Irma Veberič** of Roche Polska and goes on to talk about the transformative power of collaborations, emphasizing the need to shift from public-private partnerships to seamless collaborations and under-

scores the importance of addressing healthcare challenges through the collective effort of all stakeholders. **Veberić** also sheds light on Roche's data-driven projects, including the Similar Case Database for lung cancer patients, showcasing a commitment to improving treatment approaches.

Furthermore, she goes on to describe several initiatives been carried out with stakeholders from across the industry: "In our data journey, we've initiated a special project called the Similar Case Database for lung cancer patients. We're collaborating with five leading hospitals to compile diverse data in electronic form. The goal is to leverage artificial intelligence to identify similar cases and improve treatment approaches. We've also been actively establishing partnerships such as the one with the National Oncology Center- in Warsaw in 2017 to create Poland's first Early Phase Research Centre. More recently, we collaborated with Poznan University to launch the first data science postgraduate program and we also cocreated a developing program for students - BioTech Leaders Academy - in cooperation with Warsaw University Incubator."



Michał Grzybowski from Philips advocates for transformative healthcare solutions through collaboration: "While Poland has extensive screening programs, low implementation, and patient reporting persist. Factors include limited awareness of certain conditions, reluctance to undergo tests, and psychological fears. We're launching an educational program with the Philips Foundation this year to address this. Collaborating with other pharma and medical technology providers, we actively participate in health innovation hubs to integrate technologies to benefit patients. On this matter, Dirk Jaan from Roche Diagnostics explains that "We are taking steps to make modern, innovative, and effective diagnostics even more available to Polish patients and we develop close collaborations with diagnosticians, doctors, patients, institutions, and public administration. We make every effort to be a partner and an active participant in the process of shaping solutions for the healthcare system, showing the role of rapid diagnostics in the entire patient journey."



International Collaboration for Medical Advancements

Mariusz Olejniczak of WPD Pharmaceuticals emphasizes the international aspect of collaboration. **Olejniczak** highlights the complexities involved, and despite the business considerations, he acknowledges that significant advancements cannot be achieved alone.

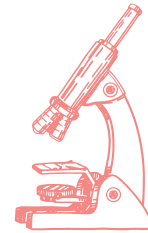
"We are meeting with a group in France that is working on glioblastoma, and we are talking about collaborating on European projects that will advance both their programs and our understanding of the disease. Because it's a business, we must decide things like who will own which portion of the intellectual property, but ultimately, building social capital and a degree of trust are crucial. However, you ultimately cannot accomplish things on your own. You need people to have very deep knowledge in a very narrow period, and we are one of the sources of this knowledge."

Echoing the importance of international collaboration, EIT Health's Ecosystem Lead **Joanna Broy**, whose organization helps individuals, startups, and mature companies upskill and network across the EU, shares some of their initiatives aimed at facilitating collaboration with innovators, from emerging to well-established, and bringing best practices to Poland. "I work specifically for EIT Health InnoStars, one of the eight geographical areas of EIT Health. It covers half of Europe, including Poland, Hungary, Italy, and Portugal, and additional regions included in the EIT Regional Innovation Scheme, such as the Baltic States, Croatia, Slovakia, the Czech Republic, Slovenia, Greece, and Romania."



Joanna highlights that her organization, founded in 2015, has also expanded globally, partnering with countries like Canada, Japan, and Israel in efforts to learn from diverse ecosystems and have a more significant impact on healthcare innovation using their network of over 120 partners. "We guide companies to navigate different European markets and regulations, making it easier to launch their products. We aim to offer a smooth market entry, making it more convenient for companies to thrive in Europe. We understand the complexities of rules in various European countries, and we help startups gain a soft landing by linking them to specific people and markets."

Biotechnology, a newly fueled muscle



In the dynamic landscape of Polish biotechnology, we find leaders who share the mission of creating a collaborative, profitable, and sustainable ecosystem for the prosperity of the entire sector.



The task of shaping healthcare policy and influencing legal decision-makers is not a simple one and requires the cooperation of numerous healthcare stakeholders. Two prominent figures, **Konrad Zawadzki**, Vice Director of the Biological and Chemical Research Centre (CNBCh UW) at the University of Warsaw, and **Marta Winiarska**, CEO at BioInMed, The Polish Union of Innovative Medical Biotech Companies, share their perspectives on sparking innovation, overcoming challenges, and building the future of healthcare in Poland.



Konrad Zawadzki sheds light on the transformative journey of the University of Warsaw Faculty of Medicine, positioning the institution as a hub for multidisciplinary collaboration. The recent establishment of the faculty complements existing strengths in biology, chemistry, physics, and forensics, illustrating the university's commitment to advancing life sciences. *"This new faculty positions us as a prominent medical research hub, complementing our Ochota campus's proximity to the Warsaw Medical University and many Institutes of Polish Academy of Science. Now, with our distinct entity, we are deeply engaged in healthcare and biotechnology; proudly partnering with the BioInMed association. This addition fills a crucial gap, enhancing our university's contributions to the field of life science."*

Marta Winiarska traces the genesis of BioInMed to Poland's venture into the innovative medical biotechnology sector about two decades ago. BioInMed emerged as a response to the sector's maturity, playing a crucial role in fostering an external ecosystem conducive to innovation and industry development.

"It is a young, but very rapidly developing sector. The creation of BioInMed happened at a time when the market had already reached sufficient maturity and the number of companies dealing with drug discovery projects ensured that a critical mass was achieved. In Poland, biotechnology companies are working on R&D projects in the area of biological drugs, small molecule drugs and advanced therapy medicinal products (ATMP) in various therapeutic areas."

Challenges as Opportunities: Navigating the Biotech Landscape

Konrad Zawadzki views the upcoming year as a blend of challenge and opportunity, with the establishment of the Faculty of Medicine positioning CNBCh UW more centrally to Poland's healthcare ecosystem. He expresses enthusiasm about contributing to the country's healthcare and biotechnology landscape, highlighting the center's role

in technology transfers and collaborations with businesses. "While we recognize we are just one part of this larger ecosystem, our new Faculty of Medicine enables us to play a more active role. Previously, we were present but not directly involved in healthcare programs. *We enthusiastically and confidently step into this vital area, which feels very promising.*"

Even though EU funds are coming to Poland, **Marta Winiarska** addresses challenges in securing public funding for biotech R&D projects. *"The life science industry is quite specific, and drug discovery and drug development are even more specific, so we want to teach our decision-makers and institutions about the biotech business model and how these types of projects are conducted. Only properly aware decision-makers are able to adjust sector support tools and incentives - financial and non-financial - so that they actually have an impact on the development of the industry and the effective conduct of drug discovery and development projects."*

She emphasizes the need for informed decision-makers, as they can at times act as barriers to innovation. **Marta** proposes workshops and scholarships to enhance understanding, fostering optimal solutions for the industry's development.

Winiarska's commitment to increasing the visibility and credibility of BioInMed, and the innovative biotechnology sector as a whole, is evident. *"We want to show the Polish decision-makers that the innovative part of medical biotechnology is the sector that is important for the economy and the future of patients. Medical biotechnology will show Poland to be an innovative country with its own technologies."*

As Marta's organization spearheads a move to facilitate innovative growth in the business-sphere, her colleague at University of Warsaw aligns with BioInMed's mission and focuses on a successful interface of academia and industry. As **Konrad** explains, a balance between both is key:

"Educating the market on the investment required in biotechnology is crucial, something that e.g. members of BioInMed handle here in Poland. Unlike in the US, where mindsets differ, we are in an earlier stage of investing in a long-term return investment in Central Europe, facing unique challenges. A decade ago, the health tech sector, especially biotech, was not mature, but now we are witnessing a transformation. The synergy between academia and industry has strengthened, requiring academia to offer more innovative solutions to an already brilliant workforce. We are navigating a fine balance as both sectors continue to evolve."

Driving Innovation and Technology Transfer: Balancing Academia and Business

Zawadzki sheds light on CNBCh UW's commitment to meaningful technology transfers, with over 100 established business relations. Notable collaborations with leading companies such as Orlen and success stories like ExploRNA Therapeutics exemplify the tangible impact of these transfers. *"ExploRNA is particularly fascinating as its RNA capsule was invented at the University of Warsaw, a notable achievement by the renowned prof. Jacek Jemielity. The University proudly showcases this success story, highlighting its involvement in ExploRNA's work to develop this groundbreaking capsule further.* However, it should be emphasized that this is just one of many success stories; many of them cannot be revealed due to non-disclosure agreements (NDAs)."

These transfers of knowledge and technology are not cheap, and it is for this reason that business and legally focused associations like BioInMed work toward securing funding and legal framework that protect these valuable processes. "We focus on stable and predictable law, among others, in the field of intellectual property, clinical trials, animal testing, as well as other regulations and provisions relevant to the biotechnology sector," says **Winiarska**.

BioInMed, in its quest for adequate legislation, is appealing to leaders. *"We are now focused on the dialogue with decision-makers and our Ministry of Funds and Regional Development. We proposed to bring some workshops and scholarships for the experts and officers of these institutions to help them understand this type of sector - how new drugs are developed, what the business model is. This is our important project for 2024. We hope that the new management of the ministry will engage in dialogue with us on this matter to develop optimal solutions for development of the sector and improve the innovativeness of the Polish economy."*

Looking Forward

From an investor's perspective, **Zawadzki** discusses Poland's favorable characteristics which position the country as an ideal country to invest in. *"Politically, post-election changes in Poland appear to position*

the country favorably within the European Union. Geopolitical turbulence, especially in Ukraine, has underscored Poland's logistical strength. Due to COVID-related supply disruptions from China, the Polish government has initiated a program to manufacture antibiotics (and other important API substances) domestically. Companies like Polfa Tarchomin, a state-owned company, play a crucial role in this context, displaying Poland's viability for investment."

Both leaders share a common aspiration for Poland's biotech future. **Zawadzki** envisions the University of Warsaw's dynamic evolution, helping shaping the future of healthcare in Poland by connecting scientists with leaders in government, while **Winiarska** envisions BioInMed's member companies playing a more prominent role in Europe, fostering growth and creating opportunities by educating decisionmakers about the importance of innovative technologies.

"We need to acquire and educate ambassadors of the Polish biotech sector, and these ambassadors should come from the expert environment and the public sector. We should raise awareness that Poland can be a partner with something to offer in drug discovery and the drug development value chain. *I am sure that should we work together - both in terms of grant support for R&D projects in this sector and international promotion - we will start to see a big change in a few years.*" The big change that **Winiarska** predicts could be one that changes the entire paradigm of healthcare in Central and Eastern Europe and elevates Poland to the level of "producer" instead of "partner."

"I hope we will have the first innovative drug ready in five years. BioInMed member companies should also be more present in the country and the European landscape. New drug discovery companies will certainly emerge as the growing ecosystem creates opportunities for this. I also want them to be close to American institutions that are responsible for the drug discovery and drug development sectors," **Marta** says.

The synergy between the innovative spirit of academia and the practical expertise of industry leaders has the potential to create revolutionary change in the way Poland is positioned on the international stage. Together, these leaders exemplify Poland's commitment to carving a niche in the evolving landscape of global biotechnology and forging a path towards a future where innovation and collaboration thrive.



Celebrating milestones: A Toast to Achievements

Celebrations in the healthcare industry are not merely markers of time but reflections of impactful journeys, dedication to positive change, and a collective commitment to improving lives. As these leaders raise their glasses, they share the reasons for their celebrations, whether marking personal anniversaries, company milestones, or the sheer joy of making a positive impact on their team and their country. Though reasons may be diverse, they all share the same purpose – to make a difference, to contribute to society, and to shape a future where healthcare is not just a profession but a passion –. **Harry Nardis - General Manager; Poland, Czech, Slovakia, Ukraine for Astellas Pharma**



Celebrating 20 years at Astellas, **Harry Nardis** reflects on the impact he has made on people's lives and the positive changes he had the chance to be a part of in the different geographies he has served. **"Reflecting on those years and every activity I was involved in; I want to celebrate the mark I have left on the places I have worked in, how positively I impacted those with whom I've worked with, the patients I have reached, and the lives I have touched through my work. Be the best you can, and the rest will come."**

Dirk-Jan Paans - General Manager Poland and Head of Management Center Eastern Europe, Roche Diagnostics



Approaching 20 years with Roche, **Dirk-Jan Paans** celebrates the substantial growth of Roche Diagnostics Poland and its establishment as a key player in the healthcare system.

"I have been with Roche for over 18 years, the last three of which have been in Poland. Roche Diagnostics Poland started some 20 years ago with 4 people. Today, we have over 250 people. We are well established and connected with customers, with labs and hospitals, with the ecosystem, and with other stakeholders who aim to develop a high-quality and sustainable healthcare system."

Geraldine Schenk – Country Director, Johnson & Johnson Innovative Medicines, Poland



Geraldine Schenk's celebration is concise and to the point: making sure that employees are well taken care of and educated on their roles within the organization. "I believe my greatest source of pride will be witnessing the outcomes of our organizational adjustments. Firstly, feedback received indicates that our focus on team empowerment and creating developmental avenues has been the right move. We are not just addressing individual needs but also aligning with market demands. Secondly, I will be immensely proud if everyone can discern their unique contributions toward our collective vision. **My most significant achievement would be team members recognizing the purpose behind their daily efforts and understanding how even small contributions add to the larger goal of positively impacting patients' lives."**

Beata Karasińska - General Manager Central Eastern Europe and Israel, Baxter



In her celebration this year, **Beata Karasińska** acknowledges her exceptional team at Baxter, whose work she deeply admires. She emphasizes the importance of listening, understanding, and maximizing her team's input when making decisions.

"I would like to thank my team first. They are great, and words cannot describe my admiration for them and their work. When I started this role, I came in with ideas about what I wanted to change. I took the time to listen and understand before I made any changes. **We tend to look at past experiences and think the same things will work here as they did there. Every situation and every company are different. I learned to give my team space and time to speak up and give their opinions before making any changes. I would celebrate my team and thank them for their input and patience."** Her celebration is a tribute to her team, highlighting the power of collaboration and shared commitment to excellence.

Ioana Parsons – former General Manager, Ipsen, Poland



Ioana Parsons toasts Ipsen's 30th anniversary in Poland. "Celebrating Ipsen's 30th anniversary has been a source of immense pride. It's not only about the history but also about the legacy we carry forward. We've touched the lives of millions of Poles over these three decades. Our journey continues, and I'm hopeful for the future. Ipsen is evolving, investing a lot in R&D, especially in rare diseases."

"Remembering that our success is all about the people and about embracing change is important. Open-mindedness and a learning mindset are crucial for the next 30 years to maintain this momentum."

Irma Veberič - General Manager, Roche Polska



Irma Veberič's speech for Roche Polska's 30th anniversary centers on the simplicity of finding joy in one's work and contributing unconditionally to the happiness of those around.

"The key to surviving and thriving for 30 years is simple: find joy in what you do and surround yourself with passionate individuals committed to bettering patients' lives. Life is beautiful when we keep it simple. My purpose is to contribute to the happiness of those around me unconditionally. Being a source of joy is what keeps me fulfilled day after day."

Andrzej Tarnkowski, CEO, Antar Orthopedics, Poland



Approaching the family business' twenty-fifth anniversary, CEO **Andrzej Tarnkowski** reflects on the international expansion and emphasizes the value associated with European products. Antar's journey is marked by global recognition and a commitment to excellence.

“We are proud to have gone international and opened our way in Central Europe. We believe we have the potential to expand to the United States and India. Outside Europe, people react differently to European products; they have value in themselves, and even if they are more expensive and not everyone can afford them, they hold prestige for many.”



Phil Krzyzek - General Manager Healthcare Poland & Managing Director Merck Sp. z o.o.

Phil Krzyzek’s excitement at the end of the year is rooted in a deeply personal and patriotic goal – to elevate Poland within Merck.

“This is a very personal and private goal because I am half Polish and I have a deep emotional connection to the country. I want to, in all ways possible, elevate Poland to the level of visibility, credibility, and respect that it deserves within the company. I want Poland to move into the top five countries in Europe for Merck, which will bring greater positive focus onto the country for investment and also broaden the opportunities available to our employees working in Poland.”



Cristiano Costanzo – VP & General Manager, Poland, GSK

Approaching his 2-year anniversary in his position in Poland, and 20 years overall with GSK, **Cristiano Costanzo** shares that he no longer thinks only in terms of performance metrics, but rather on the ways he has touched patients’ lives, and the connection he makes with the people around him.

“In leadership and life, prioritizing people is paramount. Upholding fairness, honesty, and transparency, even in adversity, has guided my journey. This philosophy has enriched my career, enabling me to contribute to patient well-being, support others’ growth, and continually learn from diverse experiences.”



Michał Byliniak - Director General, Poland, INFARMA

Michał Byliniak’s second anniversary at INFARMA is marked by celebrating collaboration and positive alignment within the pharmaceutical sector. The celebration encapsulates achievements in industry activities, support for the pharma sector, and favorable industry standing.

“Despite challenges in the pharmaceutical sector, such as the absence of a government initiative for increased medicine access, a favorable trend in innovation access is observed and well-received by our businesses, and industry alignment allowed positive collaboration with various businesses. *Our contributions to industry activities aim to positively support the pharmaceutical sector. As the representative of INFARMA, I strive to be a constructive player.*”



Paweł Augustyn, MD - President, Central & Eastern Europe, FUJIFILM

Paweł Augustyn’s reflection on nearly 15 years at FUJIFILM celebrates the financial turnaround and profitability achieved in the CEE region, along with FUJIFILM’s impact on society, diagnostics, and the company’s push for continuous improvement.

“When I first started 12 years ago, the company wasn’t doing well in the CEE region, including Poland. I am proud that we are now one of the most profitable regions for FUJIFILM Europe. From a business standpoint, this is undoubtedly my greatest accomplishment; in fact, our current tagline is ‘Never stop.’ As you might expect, we continue to improve with every year.”



Krzysztof Łokaj - General Manager, Chiesi Poland

Krzysztof Łokaj is celebrating his own personal milestone alongside that of his company, who has experienced resounding success in their 20-year history in Poland.

“I have been with Chiesi for over 10 years now, and we will celebrate our 20th anniversary next year. We will also be celebrating the impressive progress we have made in the past and our commitment to our patients. We went from a few million in turnover to a possible 230 million in 2024. This is a significant leap.”

Sławomir Szymankiewicz, General Manager, Haleon Poland

Reflecting on nearly two years at Haleon, **Sławomir Szymankiewicz** celebrates: *“In essence, these three key aspects—employee satisfaction, business success, and external visibility—will be the focal points of my discussion with the team when we celebrate two years of Haleon’s commitment to the Polish population.”*

Sławomir cites excellent results from employee satisfaction surveys, increased product penetration, and increased visibility post-spinoff from GSK. “With our independent agenda, we’ve made strides in impactful collaborations, especially in healthcare scenes, fostering a stronger presence.”

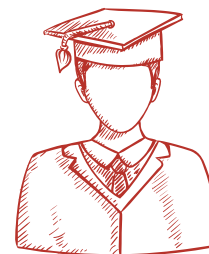


Michał Grzybowski, CEO Philips Poland, Poland

Michał Grzybowski’s first-anniversary celebration as board president revolves around the pride of a happy and passionate workforce willing to work and stay with the company during a time when scarcity of healthcare professionals presents serious risks to companies, both big and small.

“Taking a step back to consider the achievements isn’t easy when involved and busy with projects and plans. *The biggest achievement is having a team willing to work and stay with the company.* It is not the easiest job in the world, but it is very rewarding; they appreciate working with healthcare leaders, hospitals, healthcare professionals, and patients. Retaining our colleagues in the workforce is vital.”

Efforts in Education: Elevating Awareness for a Healthier Future



The transition toward a healthcare model centered on prevention calls for a concerted effort to increase awareness among the public, health practitioners, and policymakers alike. The proactive role of Polish citizens sets the stage for a population driven to adopt preventive measures.

The question remains. How can we inspire policymakers to allocate more resources into portfolios that target early diagnosis and prevention? A pivotal step toward establishing a robust, prevention-oriented healthcare system.



Executives are actively involved in educational initiatives to foster awareness at various levels. **Sławomir Szymankiewicz**, General Manager at Haleon Poland, highlights their multifaceted approach, “Our recent survey indicates that while 80% of individuals plan to prioritize their health, only 20% feel adequately informed. We aim to bridge this gap by championing health literacy, a holistic, healthy lifestyle, and mental well-being. Initiatives like the Healthy Movement campaign educate individuals on the importance of movement in daily life. Beyond delivering top-quality products,



we are committed to fostering the well-being of the people in Poland through diverse initiatives and partnerships.” **Harry Nardis** from Astellas adds his perspective, emphasizing the importance of awareness in areas such as prostate health. He notes, “Astellas invests in awareness campaigns and cooperates with patient associations and stakeholders to raise awareness about diseases like prostate cancer, including running a self-funded campaign involving the Ministry of Health. This campaign is aimed at prostate cancer because it is a disease that can be managed if it is detected early enough and can be a lifelong treatment; it does not have to be fatal. We are investing in this because it helps patients manage the disease proactively. We are doing the same thing in the transplant portfolio. We are working with the transplantation society, surgeons, and the Ministry of Health to find a way to increase awareness about organ donation and help surgeons or hospitals identify possible donors according to their state.”

Convincing Decision-makers



The issue of a lack of information or education is not something that pertains only to the average patient but to members of the government as well. **Marta Winiarska**, President of the Management Board at The Polish Union of Innovative Medical Biotech Companies, sheds light on ongoing efforts to educate high-level decision-makers. She states, “We are focused on the dialogue with decision-makers and our Ministry of Funds and Regional Development. The first round of grants was a wake-up call for us. Many projects that were good from the scientific and business perspective were not understandable to the experts at this institution.”

BioInMed’s collaborative approach aims to bridge gaps in understanding and promote a more educated view of the healthcare industry among those in positions of power.

Marta goes on to outline the situation her and her organization face in Poland. “One institution (The National Center for Research and Development) is responsible for grant calls for big companies and consortiums, and another (The Polish Agency for the Development of Entrepreneurship) is responsible for calls from SMEs. These two institutions have different interpretations of the same regulations, and we need to do something to bring the best practices from one institution to another. We also need to ensure that they understand the specificity of the industry.”



Arkadiusz Gradkowski, CEO at the Polish Chamber of Commerce of Medical Devices POLMED echoes **Marta’s** sentiment that while society and the healthcare industry may be ready for transformative change, they are waiting on the correct legal framework to do so. “We acknowledge the industry’s awareness, but our major hurdle is the government’s reluctance to invest more in medical devices, early diagnosis and creating a proper legal environment together with public financing rules around them. I’ve consistently emphasized that medical devices played a crucial role during COVID. Medical devices make it possible to diagnose, treat, and carry out rehabilitation. Together with pharmaceuticals and doctors, they are a key element of curing patients.”



Janis Meiksans, Teva Polska: “The way I see it, prevention is not only about products that prevent diseases, but even more importantly about education. Working on better habits and improving lifestyles could, for example, support the effectiveness of treatments for Type 2 diabetes or even mitigate their increasing number. It is imperative for the pharma industry to invest resources on this front.”

Spotlight: Educational efforts

“Education is the key to being even more active. We are implementing specialized certified training programs for hospital management, emphasizing sustainability. This program is known as a Polish Hospital Federation Green Certificate. We are offering this as a part of our ESG and governance. We will also be offering cyber security education through the Blue Certificate.” - **Prof. Jaroslaw J. Fedorowski**, Polish Hospital Federation





Beata Karasinska, Baxter: “In 2018, we built the Baxter Educational Center in Poland, where we promote education and train doctors. *We have trained almost 18,000 people since our door opened. This includes the doctors, nurses, pharmacists, and even some patients. Our center is a place of mutual inspiration.* We invite experts, key opinion leaders, and top-class professors who train and share their knowledge with other healthcare professionals. The professionals talk to professionals, and we act as facilitators. We provide the space and stay in the background. Healthcare professionals appreciate this learning opportunity and the fact that we are not doing any kind of hard promotion of our products. *Our room is purely educational and about shared skills in therapeutic areas such as anesthesiology, fluid therapy, acute kidney diseases, and nutrition.*”



Michal Grzybowski, CEO at Philips, Poland: “While Poland has extensive screening programs, low implementation and patient reporting persist. Factors include limited awareness of certain conditions, reluctance to undergo tests, and psychological fears. We’re launching an educational program with the Philips Foundation this year to address this. Collaborating with Poland’s largest pediatric hospital, details are pending finalization. Previous projects with Foundation Rak’n’Roll

focused on increasing ultrasound examinations for pregnant women and supporting gynecologists’ ultrasound practice. Additionally, partnerships with UNGC and participation in the Green Coalition for Healthcare underscore our commitment to broader health initiatives.”

Joanna Broy, EIT Ecosystem lead: “Our key focus in EIT Health is supporting Healthcare at different stages, beginning with education. We tackle the challenge of a shortage of healthcare workers by providing education and upskilling opportunities. We aim to scout for talent, whether healthcare providers, startups, or researchers with innovative ideas. We offer financial support and connect them with mentors, coaches, and experts. Through different programs, we guide companies to navigate different European markets and regulations, making it easier to launch their products. We aim to offer a smooth market entry, making it more convenient for companies to thrive in Europe. We understand the complexities of rules in various European countries, and we help startups gain a soft landing by linking them to specific people and markets. With our extensive network of over 120 partners, EIT Health provides access to knowledge, finances, and markets, making it a supportive platform for companies.”



Focusing on Patients & Society, Together.



Founded as a family firm, Ipsen has been innovating for patients for nearly 100 years, with an aim to keep growing and innovating for at least 100 more. With 5,000 employees working to create value for patients and society around the world, Ipsen enjoys a global reach while remaining an agile, mid-sized company.

In Poland, Ipsen has been rapidly developing in the pharmaceutical industry. Established in 1993, Ipsen has consistently pursued its mission of improving patients' lives through innovative oncology, neurology, and rare disease therapies. Guided by the motto "Innovation for patient care," Ipsen Poland is dedicated to developing effective therapeutic solutions that treat diseases and bring hope to patients, their families, and healthcare professionals.

Ipsen’s pipeline is fueled by external innovation and supported by nearly a century of development experience in global hubs in the U.S., France and the U.K. With teams in more than 40 countries and partnerships around the world, Ipsen brings medicines to patients in 88 countries.

Committed to Poland

Ipsen's commitment to patient-centric innovation is evident in its numerous awareness campaigns and educational initiatives. Ipsen's decade-long effort in raising awareness about acromegaly has significantly increased self-diagnosis rates in Poland to 12%, compared to the European Union average of 2.3%. This success highlights Ipsen's effective collaboration with doctors and patient associations to provide critical information on disease symptoms and management.

Ipsen is proactively engaging in clinical trials and patient support programs in therapeutic areas with high unmet needs, underscoring its dedication to improving health outcomes and enhancing the quality of life for patients.

Advancing Healthcare Together

Ipsen's collaborative approach is a cornerstone of its success in Poland. By providing a supportive work environment and through their Generation Ipsen for Positive Change approach, Ipsen brings the best and brightest to advance healthcare sustainably. The company's involvement in the Warsaw Health Innovation Hub since January 2023 exemplifies its commitment to fostering impactful projects and sustainable partnerships locally in Poland.

With more than 30 years of commitment to Patients and People in Poland, Ipsen is a beacon of innovation, collaboration, and patient-centric care, reinforcing its position as a partner of choice and a pioneer in the pharmaceutical industry.

Chapter 3

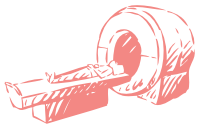
Pharma

“Access is about patients. Anything else is an obstacle. We must remember that patients are waiting, and those patients must not be left behind.”
Harry Nardis, General Manager; Poland, Czech, Slovakia, Ukraine for Astellas Pharma.

Poland's pharmaceutical industry stands as a dynamic and rapidly expanding sector, holding a strategic position within Central and Eastern Europe, and driven by both local innovation and significant international investment. With robust manufacturing capabilities, a skilled workforce, and a growing market, Poland is positioned as a key player in the region's healthcare landscape.

Portfolio Management: A Deep-Dive into Prominent Therapeutic Areas

As Poland's healthcare system matures and adapts to sustained and new challenges, we analyse the landscape of therapeutic areas within the healthcare system. We examine the key disease categories that consume healthcare resources, identify areas of unmet medical need, and explore the current trends impacting treatment options. Understanding these therapeutic areas is crucial for stakeholders navigating the Polish healthcare landscape and it allows us to better understand the exponential growth the market has seen and create a forecast for the future.



Oncology

Professor Maciej Krzakowski, President of the Polish Society of Clinical Oncology, believes Poland should have its own comprehensive anti-cancer management model which serves both to improve treatment outcomes and facilitate early diagnosis of the disease. Maciej says that such a unified approach will ensure that cancer patients receive innovative, new-generation treatment, such as hormone or BRCA-targeted therapies, instead of or in addition to standard chemotherapy. When it comes to concrete solutions for the challenges faced by cancer patients he outlines: *“First, providing a framework for conducting clinical trials across Europe accessible to all countries. Second, we occasionally run out of some agents. To address this, the European Union must establish an independent system to manufacture anti-cancer agents in Europe, and all member states must be supported. It's critical to establish a shared biobank for molecular testing.”*

Although healthcare spending is lower in Poland than the EU average, we can see that combined efforts between leading pharmaceutical companies and the Polish government have yielded positive results and an expanded offering of treatments, many of them being quite

innovative and groundbreaking, that are making their way into patients' hands and creating measurable improvements in their quality of life.

“Breast cancer treatment is a significant priority due to huge medical needs; breast cancer is the leading disease cause of women in Poland. Novartis constantly develops innovation in this disease area, reimagining women's lives worldwide. More positive readouts and ongoing developments are expected even this year.” - **Monique Clúa Braun**, Country President, Novartis, Poland

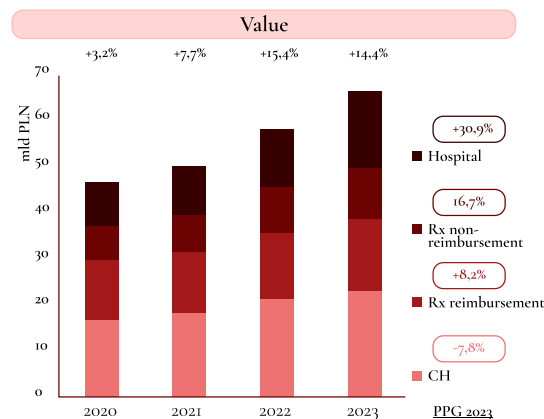
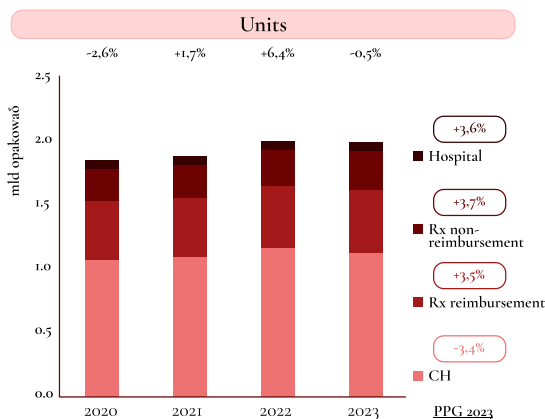


Johnson & Johnson Innovative Medicines emerges as a beacon of hope and progress. With a recent rebranding from Janssen, this pioneering company sets ambitious sights on becoming one of the nation's top three pharmaceutical leaders, driven by an unwavering commitment to delivering innovative treatments where they are needed most, such as oncology. *“Our pipeline in oncology is truly groundbreaking, revolutionizing the treatment landscape.”* says Country Director **Geraldine Schenk**, “We leverage diag-



Double digit value growth of the market

Pharmaceutical market in value and units, 2020-2023



Source: IQVIA Pharmacopoeia 12/2023 | Retail price in PLN gross | Pharmacy market: Rx: Rx reimbursed (A-V, Rx) as outline in relevant notices from the Ministry of Health (A1, A2, A3); Rx non-reimbursed (A-V, Rx) | Pharmacy market CH: offline pharmacies market (1-97 + Online pharmacies market (1-97) | OTC products outlined in the reimbursement notices from the Ministry of Health are included in the Rx reimbursed market | IQVIA DV 12/2023 Hospital market (A-V) | Net manufacturers' prices
WEBINAR | 06.02.2024 | Summary of 2023 on the pharmaceutical market

nostic tools from MedTech combined with our treatments and aim to cover the entire patient pathway - from diagnosis to treatment and recovery. This integrated approach is a significant strength we have perhaps not fully utilized. Now, we are poised to capitalize on these synergies more effectively". J&J offers a wide variety of treatments depending on the type of cancer, the patient, and the progression of the illness, allowing them to personalize treatment plans to a higher degree than was previously possible.



Roche is coming equipped with the necessary medical device knowledge to make the most of their pharmaceutical strength. General Manager **Irma Veberić** outlines how the company is utilizing the vast data resources present in Poland to add precision to their oncological treatments. *"We've initiated a special project called the Similar Case Database for lung cancer patients. We're collaborating with five leading hospitals to compile di-*

verse data in electronic form. The goal is to leverage artificial intelligence to identify similar cases and improve treatment approaches. We've also been actively establishing partnerships. Roche partnered with the National Oncology Center- in Warsaw in 2017 to create Poland's first Early Phase Research Centre."

Other companies like Merck, whose Polish workforce numbers nearly 1000 employees, are especially invested in the oncological health of the Polish people. As active participants in Europe's Beating Cancer Plan (EBCP), Merck is committed to supporting cancer care by investing resources into R&D to change the way we treat the disease. As innovators in the field of immune-oncology, they also aim to use the patient's own immune system to fight cancer by stimulating and reprogramming T-cell response, among other novel therapeutics, to let the patient's body attack the cancer itself. **Phil Krzyzek**, General Manager of Merck healthcare in Poland, is optimistic



Raising awareness



"In oncology, we focus on the treatment of solid tumors (such as renal cell carcinoma, hepatocellular carcinoma, neuroendocrine tumors, prostate cancer and thyroid cancer), while expanding our efforts in the field of hemato-oncology. Our efforts go beyond promoting our products; we also focus on educating about various medical conditions and solutions. This includes collaborating with experts, medical societies, and patient organizations to create patient education materials and programs." - **Ioana Parsons**



ASTELLAS "Astellas invests in awareness campaigns and cooperates with patient associations and stakeholders to raise awareness about diseases like prostate cancer, including running a self-funded campaign involving the Ministry of Health. *This campaign is aimed at prostate cancer because it is a disease that can be managed if it is detected early enough and can be a lifelong treatment; it does not have to be fatal.* We are investing in this because it helps patients manage the disease proactively." - **Harry Nardis**



Together we strive for the goal.

At Roche in Poland we have interdisciplinary teams in the areas of pharmacy, diagnostics, diabetes care, clinical trials, global procurement and our largest unit, the international IT research and development center.

www.roche.pl

house and have ensured stability in drug supply to the continent by producing API within the EU. *“I am confident that this will remain the case and the Central and Eastern Europe (CEE) region will continue to be an important Generics Powerhouse for Teva.”*



Rare Diseases

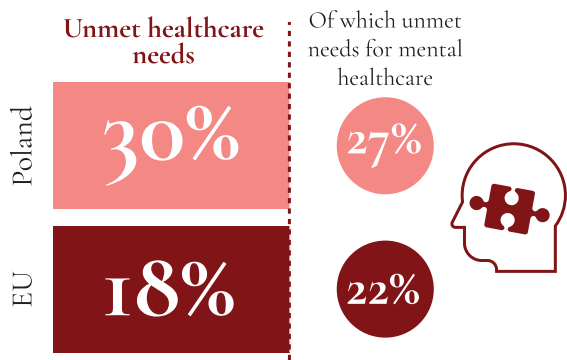
Individually, rare diseases affect a small portion of the population but collectively impact millions worldwide. Defined by their low prevalence, these conditions pose unique challenges for patients, caregivers, healthcare providers, and researchers alike whilst presenting significant unmet medical needs and underscoring the importance of specialized research, diagnosis, and treatment initiatives. The journey of individuals living with rare diseases is often marked by diagnostic odysseys, limited treatment options, and profound emotional and financial burdens, as these treatments are not as frequently covered by reimbursement as other diseases.

As awareness grows, and advances in genetics and biotechnology accelerate, there is increasing recognition of the importance of addressing the complexities of rare diseases to improve patient outcomes and foster a more inclusive healthcare landscape. IPSEN’s **Ioana Parsons** provides a startling statistic that highlights the reason behind her company’s exploration of rare diseases, which is focused in four areas: rare bone, endocrine, liver-related and neuromuscular diseases. *“There are over 7,000 rare diseases in the world, but less than 1,000 have treatments. We’re committed to bringing the full potential of our innovative medicines to Polish patients and working with stakeholders to secure broader access based on value and impact on the healthcare system.”*



As a new player in the rare disease segment is Chiesi, who this year acquired Amryt, an integration that its Polish GM **Krzysztof Łokaj** hopes will cover their efforts for “developing and delivering innovative new treatments to help improve the lives of patients with rare and orphan diseases.” Backing Chiesi’s promising portfolio of unique and clinically proven products, this is a massive step in the right direction for the Italian B-corp. Despite dealing with a lengthy approval process, one that Krzysztof says is one of the toughest within the EU, Chiesi is in the process of submitting two products to the Ministry of Health, something that will occur in 2024 and allow them to further increase their market share in upcoming years.

Unmet needs for mental healthcare account for more than one quarter of all unmet needs for health in Poland



Mental health: The Silent Pandemic

While the prevalence of mental health problems in Poland is among the lowest in the EU, this may be an underestimate due to lower awareness, higher stigma, and limited access to mental health services. The current reliance on psychiatric hospitals underscores the need for a shift towards community-based mental healthcare and reduced stigmatization of mental illness.

Teva’s Former GM in Poland, **Janis Meiksans**, stresses that a preventative approach to mental health can be a source of positive change. *“Addressing the challenges related to psychiatric and psychological issues is important, because such problems often lead to burnout and other health difficulties. Unfortunately, these concerns are sometimes overlooked, even by medical professionals, who might dismiss them, for instance, as mere headaches. At Teva, we are committed to fostering a workplace culture where such issues are taken seriously, and individuals receive the support and understanding they need.”*

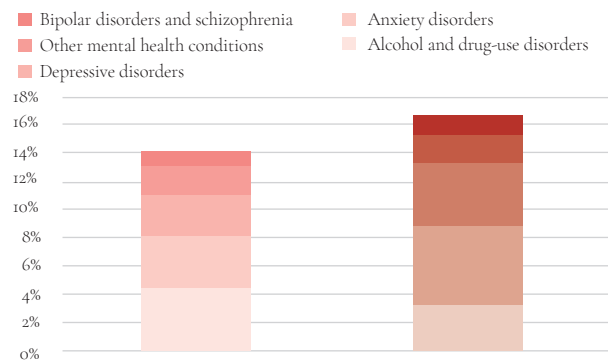


Mental health disorders’ impacts “transcend the patient,” according to Johnson & Johnson Innovative Medicine’s **Geraldine Schenk**. *“It touches their entire social circle, their family, causing life-limiting effects not only on the individual but also on those close to them. The silent pandemic of depression holds a special place because it not only stigmatizes the individual but also affects their family. From a personal standpoint, as a mother of two young boys, if they were to suffer from psychiatric illness, the weight of responsibility feels heavy. Unlike visible diseases like cancer, where there is a physical manifestation, psychiatric conditions remain unseen, leaving one feeling helpless as there is no tangible thing to treat or fix.”*



In an effort to affect positive change, **Geraldine** is proud of the various initiatives J&J Innovative Medicine has undertaken, having supported activities on Mental Health Day and sports events, such as Running for Depression or cycling events in SOS Children’s Villages, where thousands of kilometers have been cycled for charity. As Geraldine’s company currently rebrands from Janssen to “Johnson & Johnson Innovative Medicine”, they have not forgotten their origins. *“Upholding our founder’s legacy, Dr. Paul Janssen, we are dedicated to alleviating the stigma associated with mental health issues.”*

One in seven people report a mental health disorder in Poland compared to one in six in the EU



Note: The EU average is unweighted Source: IHME (Data refer to 2019)

Clinical Trials Powerhouse

A notable aspect of Poland's healthcare landscape is its emergence as a hub for clinical trials. The country's favorable regulatory environment, cost-effective and skilled medical professionals, and well-established research facilities make it an attractive destination for pharmaceutical and biotech companies conducting clinical trials. This trend positions Poland as a key player in advancing medical research and innovation and ensures the country's position as a steward of health for the rest of the EU.



“Poland excels in clinical trials, commanding a substantial 10 percent share globally, ranking third in patient recruitment after the US and Japan. We hold the seventh position worldwide in the number of trials conducted, reflecting a strong foundation in the clinical sector, where we anticipate further growth.” - **Daniel Flis**, General Manager, IQVIA Poland

Central and Eastern Europe, and Poland specifically, have increased their total number of yearly clinical trials. Poland now accounts for 28% of clinical trials conducted in CEE, the greatest share of all countries, and in the last decades has seen a significant increase in the number of medical centers participating in clinical trials, increasing from 624 to nearly 3000.¹

The diversity in both the number of therapeutic areas covered by clinical trials and the different phase types and sponsor sources shows that Poland is equipped with the facilities, professionals, and industry expertise needed to conduct studies of varying levels of complexity and cost, exemplifying the country's ability to aid in the furtherance of the study of medicine, both domestically and abroad.



As **Michał Byliniak**, Director General of INFARMA, Poland, states, *“We believe Poland's size, access to experts, and geopolitical location offer significant potential for clinical trials, shared services centers, and production.* While acknowledging

current conflicts, we anticipate improvements in our position, making Poland a safe and viable investment destination within the European Union.” Among other strengths, the country has proved to stand behind a stable framework that gives credibility to its economy. Dr. Grzegorz Cessak, President of the Office of Registration of Medicinal Products, Medical Devices and Biocidal Products, explains this has been achieved as there has been a lot of work done to simplify the application process, and collaborate with neighbour countries and create cooperation agreements, putting emphasis on the medicines shortages: “In 2023 we managed to maintain Poland's position as one of the leaders to which applications to start a clinical trial are addressed”.



On the academic side, University of Warsaw's **Konrad Zawadzki**, provides a unique perspective on collaboration.

With a focus on technology transfers and meaningful partnerships, he emphasizes the university's role in fostering collaborations with biotechnological companies and creating shared success stories: *“We have established over 100 business relations, emphasizing meaningful technology transfers.* In Poland, big companies often prefer acquiring knowledge and know-how over patents, and once they use our product or service, it becomes a tangible example of successful technology transfer.”

Significant players in the global map of healthcare have acknowledged the momentum Poland is standing on and are capitalizing on these opportunities. **Irma Veberič**, representing Roche, sees Poland as an innovation hub, citing the country's prowess in conducting clinical trials and harnessing data from its vast population. Roche Polska celebrates significant milestones, marking decades of commitment to clinical trials and advancements in IT infrastructure, setting a solid foundation for future endeavors. *“Poland serves as Roche's innovation hub, driving progress in the local market. We conduct clinical trials, harness data from 18 million people, promote app interoperability, and possess thriving IT research and development units,”* says **Veberič**.



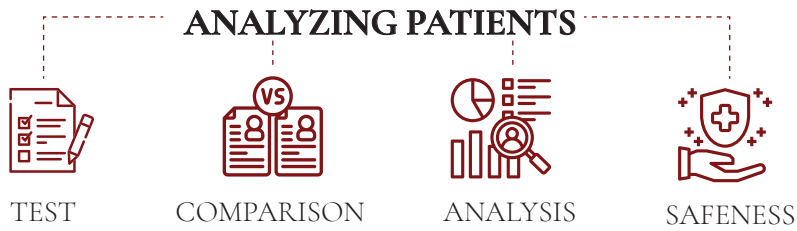
Representing the global giant Merck, **Phil Krzyzek** emphasizes the company's commitment to advancing healthcare in Poland, with numerous clinical trials underway and a dedicated focus on patient access to medications. With a strong presence in healthcare, life sciences, and electronics, Merck exemplifies Poland's multifaceted approach to driving innovation in clinical research. *“Our healthcare business effectively reaches the market, providing patient access to medications and conducting ongoing clinical research, with over 45 trials completed and 18 currently underway involving more than 750 patients across 100 clinical research sites across Poland,”* says **Krzyzek**.



Furthermore, it's not only pharmaceutical companies who are striving to take advantage of Poland's privileged assets. Phillips' **Michał Grzybowski** points out that MedTech has a powerful place in the clinical trials landscape by proving equipment that can add value to medical studies. “Collaborating with other pharma and medical technology providers,



¹ Paom.pl. (2024). Number of clinical trials of new therapeutic agents in the European Union countries. <http://www.paom.pl/Number-of-clinical-trials-of-new-therapeutic-agents-in-the-European-Union-countries,133976,0,2.html>



we actively participate in health innovation hubs to integrate technologies to benefit patients. Clinical trials in Poland can leverage our technologies, such as a fleet of cardio monitors enabling real-time data capture, fostering a non-traditional approach to 24/7 on-the-spot clinical studies.”



Despite challenges facing clinical trials in Europe, IQVIA remains committed to fostering partnerships and advancing research initiatives, ensuring Poland maintains its competitive edge in the global arena. **Daniel Flis** (GM) underscores the country’s pivotal role in clinical trials, highlighting the it’s impressive share in global patient recruitment. “Poland excels in clinical trials, commanding a substantial to percent share globally, ranking third in patient recruitment after the US and Japan,” says **Flis**. “We hold the seventh position worldwide in the number of trials conducted, reflecting a strong foundation in the clinical sector, where we anticipate further growth.”

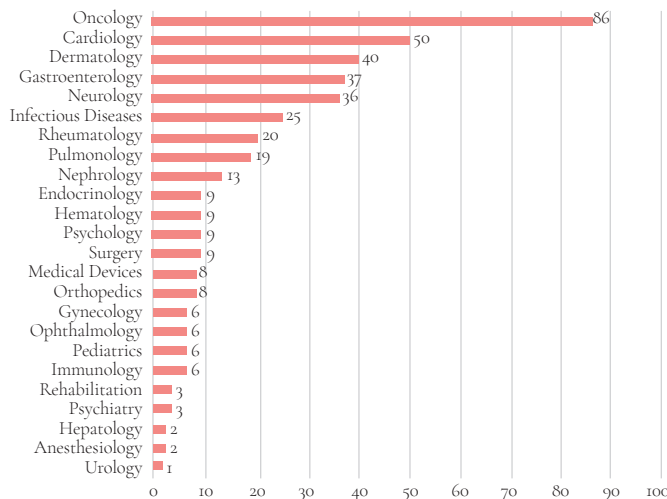
As Poland continues to make strides in this arena, collaboration among industry stakeholders and the intelligent and efficient use of available resources becomes paramount to success. Where some

entities push for improvement by leveraging strengths in research and development, others, such as **ClinicalTrials.EU** utilize innovative IT, internet platforms, and database technology to harness the power of pharmaceutical and clinical trials data for the benefit of the patient. As its founder, **Lukasz Izbicki PhD**, explains, his goal is helping patients make informed choices about the medications they use, and additionally, provide them with the resources they need to understand the clinical trials landscape in Poland and the various treatment options that may be available to them: “*Leki.pl provides reliable and up-to-date information on medications tailored to the Polish context. This prepares patients to become key decision-makers in their treatment journeys, especially with upcoming changes in prescription regulations*”.

In the heart of Europe, Poland is emerging as a formidable player in the realm of clinical trials, attracting attention from industry giants and fostering groundbreaking research initiatives. Having gained the attention of worldwide pharmaceutical giants who intend to leverage well-trained and dedicated talent and a growing global emphasis on innovation, Poland is poised to remain a global leader in pharmaceutical drug development.

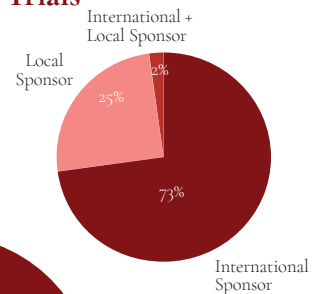
POLAND

Clinical Trials by Therapeutic Area

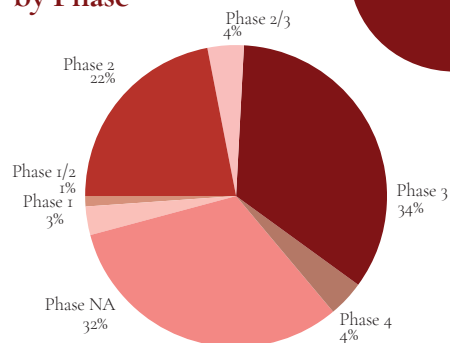


Source: Cromos Pharma. (n.d.). Poland: A thriving hub for biotech advancements and clinical trials. <https://cromospharma.com/poland-a-thriving-hub-for-biotech-advancements-and-clinical-trials/>

Clinical Trials by Type



Clinical Trials by Phase



Shared Services: Leveraging the Power of Talent

Although businesses have been leveraging foreign labor for centuries, the concept of moving crucial business processes to a foreign country and managing them remotely would have seemed like a risky proposition just 10 years ago. The challenges involved in making such a move were too high, and until recently, due to technological limitations and doubts among decision makers, the outsourcing of work was limited to simple clerical responsibilities, such as making and receiving phone calls, filing paperwork, and sending emails.

Things have changed, however, as new confidence among decision makers, gathered in part from their experiences during the COVID-19 pandemic, allows companies to take advantage of advances in telecommunications technology and business structuring in order to centralize key roles, such as HR, IT, finance, marketing, procurement, training, and R&D. This provides similar levels of cost-savings as have been enjoyed in the past, while also allowing companies to choose locations with an experienced and talented workforce that better suits their needs.



“Poland boasts a rich pool of skilled IT professionals, making it a favorable destination for expanding IT and shared services.” - **Daniel Flis**, IQVIA

Poland offers many benefits to companies choosing to base their Central and Eastern European (CEE) operations there. A diverse and well-educated talent pool, which is often multilingual and possessing higher-education degrees, is one benefit for companies who desire an advanced level of professionalism and adaptability when compared to other countries. Regarding location, Poland is in the same time zone as most of Europe, and also shares the same western culture, with many graduates studying in other European countries, allowing Shared Service Centers (SSCs) to more easily operate within a greater network of entities on the continent.



Beata Karasinska, Baxter’s CEE General Manager, explains why her company has chosen to bet on Poland. *“Poland is a country blessed with amazing talent, and this is why we decided to build the shared services hub here in Poland. Our team is growing significantly, and we are gearing up for a huge expansion.”*

Together with the director of shared services, **Beata** co-leads the onboarding program for new recruits, where she shares the company’s history and vision with all new employees, who now number over 350 workers across finance, procurement, HR, and IT departments. It seems that for Baxter, Poland has opened a door to successful growth, as she shares the brief history of her company in the country.

“Baxter Poland was established 31 years ago, in 1992. In the beginning, Baxter was a company that delivered simple solutions for patients. Baxter transformed from a traditional pharma company to a MedTech company; *It went from a handful of employees in Poland to more than 500 employees, from a company that only had a commercial team to one that currently has an organizational structure that supports patients in Poland and provides a shared service for the entire EMEA region.*” As **Beata** says, “Most of these changes happened in 2021,” which was the year Baxter set up their SSC operation in Warsaw, Poland.

Cost obviously plays a large role in the decision of where to expand a company’s footprint, and when Poland is considered as a new base of operations, companies can expect excellent value for their money. Factors such as accessible real estate price, excellent public transportation and infrastructure, and low energy costs allow companies to keep operating costs at a reasonable level while offering a higher quality of life for a company’s workforce when compared to other locations. The country offers investors a variety of cities to choose from, spread out across the entire country, each of which provides the security that workers need and the infrastructure that will keep talent happy in the country. This combination of factors is not easy to find, and it is for this reason that investors are attracted to Poland over other CEE countries. While costs may be higher than countries in Asia, in return for their investment, investors can expect a higher return of quality, and a more experienced talent pool better suited to more advanced roles.

Paweł Augustyn, MD, FUJIFILM’s CEE President, shared that they operate an SSC in the seaside city of Gdańsk, Poland, which is well-known for both for the beauty of its architecture and being the business hub in the north of the country. **Paweł** cites certain factors as to FUJIFILM’s decision to locate there: *“The Polish economy is expanding at a faster rate than the average European economy. As a strategic European country, Poland has been having substantial growth drawing in various multinational corporations to offer shared services. Poland will almost certainly experience this kind of growth when I observe that many executives are coming to the country to discover the foundation for success.”*



Wrocław, one of Poland’s business capitals located in the country’s Southwest and near Germany and Czechia, is home to Merck’s shared services center, one of only three SSCs that Merck operates around the globe. *“In total Merck employs close to 1000 employees in the country, a number which has and continues to grow consistently. This is because Poland offers exceptional access to talent, language proficiency, and a highly qualified technical workforce,”* says **Phil Krzyzek**, Merck Poland’s Managing Director and GM of Healthcare in Poland. Merck continues to leverage the excellent workforce available in Poland and put it to good use, providing patient access to medications and conducting clinical research trials, which currently involve more than 750 patients across 100 clinical research sites in the country. “There is a genuine and consistent commitment to drive the business, but also to develop employees and provide a great place to work where people can be themselves and feel great satisfaction in their work.”



Talent at Work

Poland's healthcare landscape is distinguished not only by its advancements in medical research and technology but also by the wealth of talent it contributes to the sector. With a robust education system producing highly skilled professionals, Poland has become a hub for healthcare expertise, drawing clinicians, researchers, investors, and innovators from around the globe. From pioneering medical breakthroughs to driving innovation in pharmaceuticals and biotechnology, the talent pool in Poland continues to shape the future of healthcare both domestically and on the international stage.

In a highly competitive and often short-staffed industry, attracting, training, and retaining talent in Poland's healthcare sector requires a multifaceted approach. Investing in comprehensive training programs, fostering a supportive and collaborative work environment, and offering competitive compensation packages are essential strategies to attract top talent. Additionally, providing opportunities for professional development, promoting a culture of diversity and inclusion, and prioritizing employee well-being are crucial for retaining skilled professionals in the long term. The leaders interviewed here share their appreciation for a healthy, happy workforce and share their strategies to support workers' growth and satisfaction, so Poland can continue to thrive as a leader in healthcare innovation and delivery.



Roche - Irma Veberič

As Roche's **Irma Veberič** explains, it's not just about attractive salaries, but also about creating a positive working environment and a brand of trust amongst employees. *"I value trust, honesty, and open discussions with employees. A smile on our employees' faces and regular meetings with various staff members, where we discuss multiple topics, fuel my drive to ensure a happy and motivated workforce."* **Irma** goes on to detail Roche's flexible location policy, which "enables employees to work from anywhere in the European Union for up to three months or up to 10 days from other locations if their schedules allow."

Two of Roche's unique initiatives for building their brand and attracting workers revolve around working with teens and young

mothers in an effort to bring them into the workforce. "Firstly, we began a collaboration last year with 19-year-olds through a mentorship program on a specific case. It has been a rewarding experience. Secondly, we launched the second edition of Destination IT program in cooperation with "Working Mom Foundation" in October. This initiative helps moms from other industries transition into IT through mentorship. It's a distinctive program, and from the first edition, *we've already welcomed three young mothers as employees who decided to join Roche.*"

Irma recognizes the opportunities available to Roche in Poland and intends on making full use of such an opportunity. *"Our capable workforce and the scalability of our 38 million population make Poland an appealing destination."*



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Ipsen - Ioana Parsons

“Attracting talent to the pharmaceutical industry is easier than in other industries because our mission to improve patients’ lives resonates with people’s desire to contribute positively. Culture plays a vital role for us at Ipsen. We aim to foster a culture of collaboration and excellence, and I firmly believe in the value of cooperation and teamwork. It’s at the core of what we do.”

Reflecting changing cultural values regarding remote and hybrid working arrangements, **Ioana** details Ipsen’s policy in this regard: “We follow a ‘3 + 2’ policy for office-based staff: three days in the office or at events and two days remote, averaging 60% in-person and 40% remote work each month. This approach provides empowerment, flexibility and allows teams to define their rhythm and when they need to come together for collaborative efforts.”

Ioana shows that at Ipsen, talent management is a priority, dedicating her own time and attention to helping employees progress in their roles in addition to offering in-person and online training programs. *“Motivation, particularly in times of complexity and uncertainty, requires special attention, beyond financial incentives. It’s about maintaining a strong sense of purpose and shared values in our work.”*

Reflecting on the best way to retain employees, **Ioana** feels lucky that she has the support of her team, and in turn, gives them the support and liberty they need to feel welcome at Ipsen. *“When I worked in consulting, I learned that change is effective only when done with people rather than to people. It’s a lesson I’ve carried into my current role. We have a portfolio of initiatives, but involving our team in the process is crucial*

for success. I was fortunate to join a successful organization, so my approach has been more about evolution than revolution. I’ve had the freedom to make strategic investments and try new things, building on our strengths. I try to give the same freedom to my people. It’s a refreshing experience.”

Johnson & Johnson Innovative Medicine - Geraldine Schenk



J&J Innovative Medicine’s **Geraldine Schenk** outlines a comprehensive talent management strategy that encompasses all areas, from attraction, to training and retention, including how J&J helps employees find their own path within the organization.

“As we enter a new generation with unique expectations around work-life balance and professional growth, aligning with our company’s philosophy offers vast opportunities to meet these evolving needs. Simultaneously, we acknowledge the strong pool of talent already within our organization. Clear and concise development conversations are crucial to nurture and advance this talent. These discussions revolve around defining target roles and how to prepare individuals for these positions, emphasizing strategic thinking and career ownership. We encourage team members to consider roles beyond their immediate next step, as each step prepares them for their ultimate target role. This clarity in career direction is pivotal.”

In an effort to stay abreast of the newest industry developments, **Geraldine** says that her organization creates the space necessary for new roles, displaying a level of adaptability that is a strategic benefit

Johnson & Johnson
Innovative Medicine

Leading where
medicine is going



in companies as large as hers. “We constantly evaluate the drivers of development and the necessary capabilities, creating new roles that align with portfolio development. We have established lateral moves and new roles for high-potential talents to gain first-hand leadership experience. Despite our lean structure, these opportunities exist and are vital for growth.”

Geraldine says that instead of focusing purely on attracting talent, it is important to clearly define employees’ expectations and desires, laying the groundwork for their future career goals. *“We advocate for lateral moves and diverse experiences across our various disease areas and functions within J&J. This move significantly enriches knowledge, leading to a solid foundation for future career acceleration within the company’s broad portfolio of roles and disease areas.”*

Astellas – Harry Nardis



Astellas Poland, Czech, Slovakia, Ukraine GM **Harry Nardis** believes that it isn’t a company’s benchmark performance or HR policies that make the difference. *“I think it is all about values. We must ensure that the values of the company are aligned with the values of the people working for it. We need to ensure that the Astellas values exist in the people working for Astellas in Poland and the candidates we would like to attract.”*

Harry goes on to say that while remaining competitive in terms of salary is necessary, it isn’t the only thing to consider. *“To go the extra mile and excel in what we are doing, we need to have passionate people who are passionate only if their values align with the company’s. We believe in that. Many leaders can communicate effectively, but it is important to be consistent with these values daily and make decisions that prove you believe in them. That is the only way people can connect, engage, and be passionate about their actions. This is even more important now with the existence of remote and hybrid ways of working. We are committed to supporting flexible working methods, and work-life balance is important. How do you keep your people connected to the company? One common goal, one common passion.”*

Baxter – Beata Karasinska



Baxter’s GM in Central and Eastern Europe says that the people at Baxter are content and enjoy a diverse work culture. *“I have worked for more than five companies in my professional career and can make comparisons. The people at Baxter enjoy what they do. I saw it on the first day. They are nice people who have created a positive work culture. Our team is made up of people from over 10 countries. We speak more than 10 languages at Baxter.”*

While having such a multicultural team might seem like an obstacle, **Beata** explains that with the right accommodation, it becomes an asset: *“Our onboarding process is never in Polish because there is always at least one person who does not speak Polish. This fosters an inclusive spirit. Everything starts with the recruitment process. We want to have a diverse team. People in top leadership positions understand that a diverse group leads to better outcomes.”*

Boasting a gender ratio that leans slightly in favor of women, **Beata** is proud that “the signal comes from the top,” emphasizing that this statistic does not only apply to the general workforce, but even to the highest leadership positions, showing that the principle of equality runs throughout the entire company.

When it comes to development, Baxter also takes a unique approach which strengthens workers and fosters an environment where competency is key, but not only in one area; Baxter values multidisciplinary skills as they add to a well-rounded team.

“At Baxter, development does not necessarily mean going up; it can also mean remaining at the same level but doing something different. That is necessary because you need experience in various fields to grab opportunities. If you come from finance and have never done anything but finance, you cannot reach positions at the C level. If you have experience in finance, HR, and marketing, you have three different possibilities to get the C level. This is why we have Baxter Academy and sponsor external courses with universities. We promote English lessons since that is the language of business. We do the right things, and we do it consistently.”

Baxter employees are encouraged to speak up and express their ideas to tell leadership what is needed most. *“We have a lot of freedom in our development, and our employees’ ideas are appreciated. We know in which direction we want to develop, and our flexibility and openness differentiate us from other companies. We also have groups for women. We believe in sisterhood. We have mentoring programs. These are the things that, in my opinion, every company needs to have.”*

Merck - Phil Krzyzek



Merck’s GM of Healthcare in Poland, **Phil Krzyzek** explains that when it comes to building a work culture, he aims to make employees feel safe and secure when things become challenging. *“The most fulfilling work environment, in my perspective, combines a high degree of challenge with strong trust and support.”*

Phil says that his company’s culture aligns perfectly with his own personal philosophy: creating high levels of impact while collaborating toward collective improvement. *“Regardless of the organization, I strive to foster a culture where problems can be openly addressed with transparency and the right intentions. This atmosphere acknowledges and values individual differences, recognizing strengths and weaknesses as aspects to navigate collaboratively.”*

Krzyzek says that providing a great workplace requires introspection and most importantly, a positive attitude, good treatment of employees, and a shared willingness to contribute. *“We need to always question ourselves and create a wave of positivity and motivation. When it comes to retention, we of course look at the same things as many organizations - rewards, terms, conditions - the tangible things. However, I think what really differentiates us is the culture and the way we treat people. There is a genuine and consistent commitment to drive the business but also to develop employees and provide a great place to work where people can be themselves and feel great satisfaction in their work.”*

Novartis - Monique Clúa Braun



Monique Clúa Braun, Novartis Poland’s Country President states that the pharmaceutical industry attracts those of the new generation that are particularly purpose driven and adventurous. *“Novartis distinguishes itself by allowing individuals to fulfill their purpose by helping bring innovative medicines and solutions that save and prolong people’s lives so that we can impact and change the world. This uniqueness brings excitement and a sense of venturing into unexplored territory.”*

Monique goes on to say that Novartis facilitates this adventure by providing young professionals with flexible career path programs which depart from traditional structures, allowing for more freedom in direction and adaptability. *“This change responds to the evolving expectations of younger generations, fostering agility in skills and mindset.”*

Braun stresses that a company’s culture is vital. *“It’s about how one feels upon entering. A supportive environment where open communication and collaboration are encouraged, regardless of position, creates a magical and successful working atmosphere.”*



GSK – Cristiano Costanzo

As Poland General Manager and VP **Cristiano Costanzo** explains, GSK is looking for employees who can work within an at-times demanding industry while maintaining a desire to contribute to the future of medicine. In exchange for their hard work, Costanzo offers a once-in-a-lifetime opportunity for those looking to make a difference. *“We’re seeking individuals who thrive in challenging environments and are eager to contribute to our evolving portfolio. GSK Poland has shifted its focus towards innovation, particularly in oncology, vaccines, specialty products, and HIV-related items—a unique opportunity for talented professionals to work on cutting-edge products rarely found elsewhere.”*

GSK does, according to Cristiano, all that it can to empower employees and allow them to shape the company’s future. As so many others have said, retaining talent is essential in this industry, and a comprehensive development plan has been employed to ensure that the best and the brightest are retained. While competitive compensation is clearly essential, GSK goes beyond typical processes and presents clear objectives to managers and staff regarding the evolution of their capabilities and the value they offer in solving global challenges. *“Personal and professional growth opportunities are central, ensuring every team member, including leadership, understands their development areas and potential opportunities for advancement.”*



FUJIFILM - Paweł Augustyn, MD

At FUJIFILM, fostering employee engagement and a sense of belonging is paramount to success. Their recent engagement survey in 2023, as CEE President **Paweł Augustyn, MD** explains, yielded promising results, indicating that their employees resonate with the company’s vision and feel connected to their shared mission. *“I am proud of the results, as we ranked very well not only against FUJIFILM average, but also against our competitors’ benchmark in the market.”* This feedback not only reaffirms FUJIFILM’s commitment to creating a positive work environment but also positions them favorably compared to the rest of the industry.

As part of ongoing efforts to recognize and celebrate employee loyalty and dedication, **Dr. Augustyn** personally hosts biannual kickoffs for the entire organization. These events serve as opportunities to honor individuals who have dedicated significant portions of their careers to FUJIFILM, with many celebrating milestones such as their 25th anniversary with the company. *“As a leader, it is fulfilling to see members of the same family of different generations working in FUJIFILM,”* something which is not only a testament to a successful company culture but also a powerful morale booster for upper management. It speaks volumes about the sense of belonging and camaraderie that permeates throughout the organization, reinforcing their commitment to fostering long-term relationships with employees.

Haleon - Sławomir Szymankiewicz



Haleon Poland’s GM **Sławomir Szymankiewicz** is able to list several factors which contribute to the strength of the Polish healthcare workforce. As he explains, Poland possesses a large talent pool of young, multilingual professionals who are recognized worldwide for the quality of their education and their creative, problem-solving mindsets, a product of their culture, he says, which is resilient in the face of challenges.

Szymankiewicz also points towards the excellent education system present in the country, which lends itself to a two-fold return on investment, both in-country and abroad. *“The availability of top-notch universities and a trend among Polish professionals to pursue studies in Western institutions post-European Union accession further enriches the talent pool. The return of these individuals to Poland enhances the workforce with an international outlook.”*

“This dynamic,” says **Szymankiewicz**, “has spurred the proliferation of hubs in major cities such as Warsaw, Krakow, Poznan, and Wrocław. Notably, Tomasz Mechelewski has been pivotal in leading GSK and Haleon hubs for the past 15 years. *The growing number of hubs reflects the thriving environment and the continual influx of companies into Poland.*” The situation in Poland is certainly looking promising, and leaders at Haleon are taking advantage of the unique benefits the country provides by caring deeply for their employees.

“Ensuring the well-being of our employees is integral to our sustainability strategy. Various programs and systems support work-life balance and mental health. Initiatives include online access to coaches, mental health specialists, no meeting days, short Fridays, and innovative work structures. *As a leading company, we offer a hybrid work model, paternity leave, and other benefits that enhance employee satisfaction and attract top talent.*”

Citing the above-mentioned support systems, as well as many environmentally conscious company policies, **Szymankiewicz** states, “These initiatives not only foster a healthy work culture but also serve as industry benchmarks, demonstrating our commitment to sustainability and employee well-being.”

Teva - Janis Meiksans



In today’s dynamic and ever-evolving landscape, the pharmaceutical industry demands a level of expertise that transcends conventional education. Leadership at Teva recognizes that talent has emerged as a crucial driver of success, shaping the trajectory of companies within our sector. As **Janis Meiksans**, former Teva Polska GM puts it, *“A talented workforce can elevate a company’s prospects, while the absence of skilled individuals can impede progress significantly.”* A skilled and talented workforce can propel a company towards its goals, while the absence of such individuals can pose significant challenges to growth.

Janis says that while there is no shortage of talented professionals, having them geographically dispersed throughout a country or region can pose difficulties in addition to the common obstacles associated with contracting qualified workers. Teva presents a unique solution: “When faced with such situations, it’s crucial to make strategic decisions. Placing functions where the talent resides, even if it means establishing operations in different cities or moving positions, has proven successful for us in Teva. To attract exceptional specialists in their fields, we align our approach with their needs.”

Monique Clúa Braun

Country President
Poland, Novartis



EF: What challenges and opportunities do you anticipate for 2024, and what is your outlook for the upcoming year?

MCB: I prefer to focus on opportunities rather than challenges. While acknowledging the world's current challenges and complex geopolitical landscape in Poland, I remain positive, influenced by Poland's overall growth and commitment to innovation and digital technologies.

I see this as a year of advancement in the pharmaceutical sector, which is my passion and work. We have the opportunity to contribute to medical progress in research, where companies like Novartis expect significant breakthroughs in various disease areas and ensure that these medical innovations are available to patients who need them in Poland.

My focus is not just on having effective medicines but also on facilitating their accessibility to the right patients at the right time. This involves the reimbursement process and ensuring that the drugs reach the patients who can benefit from them. *This year should be about growth, leveraging innovation, and helping more patients with our efforts.*

EF: Could you share the mission you set for yourself and what opportunities you saw in your career?

MCB: I have extensive commercial experience across Latin America and Canada, which I still feel connected to, personally and passionately. Meeting people who share this passion excites me. Simultaneously, I aim to fulfill my mission and impact the world meaningfully. This led me to seek professional development in a different setting, and I saw Europe as the ideal place for this transformation.

As we are in a crucial moment of organizational evolution, my role in Poland has become more important. The decision to merge business units is aimed at enhancing agility and better serving our customers. Participating in this transformation presented challenges and a unique opportunity to build a new team united by a shared purpose. Our current priorities are aligned with addressing universal societal health issues, focusing on oncology, hematology, immunology, neuroscience, and cardiovascular.

Our first year involved internal restructuring for efficiency, and now we're more externally focused, emphasizing collaboration and partnerships. *No industry operates in isolation post-pandemic, and we're actively engaging with hospitals, institutions, and other companies to reshape healthcare ecosystems. In Poland, there is a shortage of healthcare professionals. We are exploring digital and AI solutions to address this challenge through ongoing pilots in certain hospitals.*

“ The magic, as I call it, happens when technology, partnerships, and a passionate team align ”

Internally, my focus is on promoting diversity, introducing new working methods, and encouraging younger generations to contribute meaningfully to our organization. This is a holistic approach to delivering impactful healthcare solutions and making a positive difference.

EF: Could you elaborate on the current strategic importance and structure of therapeutic areas in the Polish footprint?

MCB: Novartis focuses on three therapeutic areas: oncology and hematology, neurology & immunology, and cardiovascular. Breast cancer treatment is a significant priority due to huge medical needs; breast cancer is the leading killer of women in Poland. Novartis constantly develops innovation in this disease area, reimagining women's lives worldwide. More positive readouts and ongoing developments are expected even this year. Hematology remains a consistent part of Novartis' portfolio, and promising compounds

are also awaited. Novartis is also at the forefront of enabling access to radioligand therapies, particularly for prostate cancer patients.

The company has recently launched a multiple sclerosis asset, addressing a disease that predominantly affects young people, and changed the treatment paradigm, empowering the most effective treatment at the very early stage of the disease. Immunology is another key area with multiple indications and potential value for patients and the healthcare system in the coming years. Although Poland faces challenges due to delayed product launches compared to other European countries, Novartis is committed to delivering quality care and improving cardiovascular treatment. Also, in this civilization problem, we bring an outstanding solution that addresses the main reason for cardiovascular events.

Our focus includes ongoing research, early access initiatives, and the establishment of a Novartis Operations Hub. Clinical trials and investments in new disease areas underscore Novartis' dedication to advancing healthcare solutions in Poland.

EF: What key points formed the basis of your pitch to headquarters in presenting Poland as the preferred location for these significant operations and footprints?

MCB: I believe Poland has three key advantages. Firstly, its strategic location is excellent. Secondly, the country boasts a highly skilled workforce. Thirdly, Poland's drive towards innovation in medicine, exemplified by technology companies establishing a significant presence in Poland, makes it an ideal country for operational centers and expanding its footprint beyond traditional settings.

I see Poland as a well-kept secret in Europe. Having lived here for 18 months, I appreciate the richness of the country and the highly skilled and purpose-driven people. It also emphasizes several factors contributing to Poland's rapid evolution, and I believe it will be a country of substantial growth in the next decade. Partnership and addressing challenges will be crucial for Poland's role in the European landscape.

EF: Could you elaborate on your strategy for attracting talent, particularly the younger generation?

MCB: There are three key factors, and despite the actual challenge of attracting people, the pharmaceutical industry is appealing to purpose-driven new generations. Novartis distinguishes itself by allowing individuals to fulfill their purpose by helping bring innovative medicines and solutions that save and prolong people's lives so that we can impact and change the world. *This uniqueness brings excitement and a sense of venturing into unexplored territory. Secondly, new programs for young professionals aim to offer a more flexible career path, departing from traditional structures.*

This change responds to the evolving expectations of younger generations, fostering agility in skills and mindset. Lastly, *the company's culture is vital—it's about how one feels upon entering. A supportive environment where open communication and collaboration are encouraged, regardless of position, creates a magical and successful working atmosphere.* The company's development program for young talents has succeeded in enabling them to impact and fulfill their purposes.

EF: What keeps you inspired and motivated in your role?

MCB: *The perpetual sense of being a learner is crucial. I purposefully engage in diverse activities, always seeking learning opportunities that challenge me to think differently. Secondly, amid the situation of our world, I'm driven by a desire to contribute positively. Observing the challenges, especially in the aftermath of the pandemic, where a significant backlog of undiagnosed patients exists, motivates me to think about what more I can do. While I may feel tired at the end of the day, each new day brings an opportunity to make a positive impact, a mindset I developed during my experiences in Argentina, where navigating daily crises was the norm. I believe this perspective will be relevant for years to come.*

Irma Veberić

General Manager
Roche Polska



EF: Could you elaborate Roche Polska and its footprint?

IV: At Roche in Poland, we have a unique opportunity to work and create solutions for healthcare, looking much more broadly than just from the perspective of a provider of medical products and services. In our country, there are interdisciplinary teams in the areas of pharmacy, diagnostics, diabetes care, clinical trials, and global procurement, but in Poland we have our largest unit, the international IT research and development center. *Our research and development center is based in Warsaw and Poznań and boasts more than 600 employees. We're one of three such centers worldwide, with the others in Kuala Lumpur and Canada. We've developed over 20 apps and various support systems. Roche Polska employs over 800 people, more than 1000 when you include diagnostics and diabetes.* Additionally, we have around 5,000 contractors on standby to support our research and development team. We're proud of our presence in Poland and are consolidating to one location in Warsaw by the beginning of next year.

Last year, we invested more than 1.6 billion Polish Złoty, almost double what we earned from reimbursements and product sales. This substantial investment underscores our commitment to improving health possibilities for our citizens, the Polish economy and our serious engagement in cocreating solutions with the government and other stakeholders.

EF: Could you elaborate which therapeutic areas are the focus in Poland?

IV: Roche used to focus on oncology primarily, but now we're diversifying our portfolio. In the past, our company was recognized mainly because of our oncology portfolio, which in many areas changed the paradigm of treatment. *While oncology remains a strong focus, we're also expanding into neurology, neuroscience, and rare disease in Poland, we're making significant strides in multiple sclerosis, with our products now reimbursed for all registered indications.*

We're also involved in spinal muscular atrophy (SMA) and related therapies, which are showing promise and hope. One of the main challenges in Poland is late product reimbursement, the average from W.A.I.T. report shows it's almost 844 days, while German patients wait only 133 days. Although we recently achieved a reimbursement in just 400 days for one of our neuroscience products, which we're very proud of. In addition to neurology, we're working on ophthalmology, hoping to make our products available to Polish patients. *Roche is no longer just an oncology company; we're branching into multiple other areas.*

We're excited about participating in the E-Health hackathon created for young and creative people. We were among the first companies to join last year because we believe in how healthcare should work – through public-private partnerships. In Poland, trust is a key issue in such collaborations. We're eager to participate and show what true partnership means.

“ I dream that one day, we won't have to talk about public-private partnerships: it'll just be partnerships. Healthcare challenges can only be solved in collaboration; all stakeholders must work together. ”

COVID-19 boosted some blocks, but now the momentum is slowing down. As Roche and individuals, we must find ways to rekindle that spirit.

The Ministry of Health chose the hackathon topics, building on last year's cardiology focus. Cardiovascular diseases are still one of the leading causes of death among Poles. Interestingly, Roche is diving into cardiology this year. The collaboration involves cooperation between Roche, the Ministry of Health, and the medical research community. This marks our second successful collaboration with the E-Health Center and the Ministry of Health.

In November, a new reimbursement law will be enacted, although many details remain uncertain. Reimbursements, which used to happen four times a year, would be reduced to three times a year starting next year.

EF: Could you elaborate on the goals of the Hackathon?

IV: One of the goals in organizing the hackathon is to address the data challenge in Poland's healthcare. Currently, we need more data sharing, which hinders the system. *Sharing data can benefit patients by facilitating better treatment solutions and pathways. Properly utilizing data through training can significantly enhance healthcare outcomes for the entire system.*

We've engaged in extensive discussions with the Ministry of Health, the Department of Health, and the Medical Research Agency regarding innovation and the importance of data sharing. During our meeting in July, the discussion underscored the critical role of data in developing effective projects for patient well-being.

In Poland, we're actively collecting vast healthcare data, positioning ourselves ahead of certain Western systems. Remarkably, nearly 18 million individuals are covered under the Internet patient scheme. While we may face challenges, this vast data pool is valuable. It's a journey to find the best way forward. Poland's experience with a significant population can provide valuable insights when considering the European health data space. Having worked with such a substantial dataset, we can contribute to shaping a more comprehensive European healthcare approach.

EF: How does data enhance and support your work at Roche Polska?

IV: In our data journey, we've initiated a special project called the Similar Case Database for lung cancer patients. *We're collaborating with five leading hospitals to compile diverse data in electronic form. The goal is to leverage artificial intelligence to identify similar cases and improve treatment approaches.* Another significant project is V4, which is in progress. We've also been actively establishing partnerships. Roche partnered with the National Oncology Center- in Warsaw in 2017 to create Poland's first Early Phase Research Centre. More recently, we collaborated with Poznan University to launch the first data science postgraduate program. We cocreate a developing program for students - BioTech Leaders Academy - in cooperation with Warsaw University Incubator

We've also sought grants from institutions like the Warsaw Health Innovation Hub, which plays a pivotal role. *These collaborations emphasize the importance of data in our work. For instance, we've developed 21 apps in Poland, three of which are widely recognized. "Floodlight" aids multiple sclerosis patients by tracking their condition between doctor visits. "My Vision Track" is designed for ophthalmology, reflecting our entry into the field, and "mySugr" continually monitors blood sugar levels for diabetes management.* These apps have already made a positive impact, and our goal is to integrate them into a comprehensive ecosystem in the future.

EF: What challenges and opportunities arise from collaborating as pharmaceutical innovators with similar interests in Poland?

IV: We always face various challenges, and one key challenge is defining a common goal that we can collectively work towards. We take the lead and focus on what we believe can impact patients' lives. We're venturing into home delivery and care, collaborating with select companies. We've received confirmation from six companies, which is a positive step. We aim to keep this group small and focused, around six to eight companies, to ensure effective collaboration while maintaining trust within the industry. This way, we hope to build something impactful and mutually beneficial. This is a glimpse into our recent efforts to engage with like-minded organizations and drive positive change.

Roche has played a pivotal role in various critical healthcare topics, including creating an idea of new medical funds three years ago. In collaboration with another companies, this initiative aimed to create specialized forms of cancer treatment personalized for each patient. The project received substantial support, with around 1 billion from the Polish budget allocated towards innovation in cancer treatment and related areas. This funding significantly eased finding solutions and financing new medicines, leading to successful outcomes.

Indeed, the 400-day success story is connected to this initiative. Poland achieved a significant milestone by being the third country globally, after Switzerland and Germany, to secure reimbursement for a treatment for neuromyelitis Optica spectrum disorder, a rare autoimmune disease. Roche Poland is a pioneer in the Polish market, boasting a strong reputation. This reputation facilitated smooth project launches, such as the home care initiative, where collaboration with eager companies for aspects like home delivery was readily achieved.

Another significant initiative is the project aiming for 6-7% GDP allocation for health spending, which was initiated a decade ago. It's a critical effort to advocate for increased healthcare investment. This project has evolved, particularly focusing on financial system transparency, and facilitating conversations with stakeholders about healthcare financing. We strive for greater transparency to enhance citizens' understanding of the healthcare system for a more informed future.

“ Poland serves as Roche's innovation hub, driving progress in the local market. We conduct clinical trials, harness data from 18 million people, promote app interoperability, and possess thriving IT research and development units. ”

EF: How do you assess Poland's potential to become a European innovation hub for the Roche Global Group?

IV: *To remain globally attractive, stability in legislation is crucial.* Predictability in what we can expect is key for competitiveness, and Poland needs to focus on enhancing this stability. Despite challenges like inflation, our well-educated workforce and expertise are strong assets. We're particularly renowned for our IT, clinical trials, and procurement capabilities, providing a solid foundation to draw more global attention and opportunities for advancement.

EF: How do you position Roche to attract talent and create a company culture in Roche Polska?

IV: If I were to pitch investing in Poland, I'd highlight the strong probability of substantial returns. Our track record and history speak volumes about what can be achieved here. Additionally, our capable workforce and the scalability of our 38 million population make Poland an appealing destination. Investors are attracted, especially due to the favorable pricing we offer in Poland, among the lowest globally, which showcases our commitment to polish patients. Poland also plays a pivotal role in clinical trials, contributing to progress in multiple healthcare domains.

Regarding employee attraction, we're diligently enhancing our branding. It's not just about salaries but also about fostering a positive work environment. I value trust, honesty, and open discussions with employees. A smile on our employees' faces and regular meetings with various staff members, where we discuss multiple topics, fuel my drive to ensure a happy and motivated workforce.

Our flexible location policy enables employees to work from anywhere in European Union for up to three months or up to 10 days from other locations if their schedules allow.

I'd like to highlight two unique initiatives in building our brand and attracting talent. Firstly, we began a collaboration last year with 19-year-olds through a mentorship program on a specific case. It has been a rewarding experience. Secondly, we launched the second edition of Destination IT program in cooperation with "Working Mom Foundation" in October. This initiative helps moms from other industries transition into IT through mentorship. *It's a distinctive program, and from the first edition, we've already welcomed three young mothers as employees who decided to join Roche.*

EF: What will be the key points of your speech for Roche Polska's 30th anniversary next year, and what will you tell your workers when you observe these important milestones?

IV: Next year marks a significant celebration for Roche Polska: 30 years overall, 25 years of Clinical Trials, 20 years in IT, and a decade in diabetes. The official office opening is scheduled for March, graced by our new CEO, Thomas. *Roche's presence in Poland spans over 120 years, a rich history we're proud of. The key to surviving and thriving for 30 years is simple: find joy in what you do and surround yourself with passionate individuals committed to bettering patients' lives. Life is beautiful when we keep it simple. My purpose is to contribute to the happiness of those around me unconditionally. Being a source of joy is what keeps me fulfilled day after day.*

Phil Krzyzek

General Manager Healthcare Poland & Managing Director Merck Sp. z o.o.



EF: Merck Healthcare is poised for growth in 2024. Do you see this year as a challenge or an opportunity?

PK: Poland's economic opportunities align closely with observed growth data. *Reimbursement conditions and access to innovative treatments has improved, which is a crucial factor for investing in innovation in Poland and conducting business. The good news is that Poland has progressed from the 25th to the 21st position in EU reimbursement rankings.* While commendable, further enhancements are vital, considering Poland's stature. Despite progress, healthcare spending per capita remains one of the EU's lowest at 1,700 EUR per capita vs the 3,000 EUR per capita EU average, which suggests healthcare spending needs to be a strategic focus for Poland. Although improvements have been made, Poland must address its third-lowest rank in reimbursement waiting times and the limited number of innovations available to Polish patients – with only 42 available in Poland out of a total of 160 licensed between 2017 and 2020. Enhancing reimbursement efficiency and fostering innovation are imperative for Poland's continued advancement given the relationship between health and productivity in any society.

Furthermore, even when products are reimbursed in Poland, there is strict prescribing control limiting reimbursement to a smaller population than the drug's actual license. 78% of available innovative medicines are reimbursed to a limited group of patients vs the licenced indication in Poland. This challenge impacts patients, hindering access to expected treatments, doesn't encourage innovation and in the long term fails to exploit the potential of innovation to reduce the indirect costs of the health and social care system. Addressing this hurdle is crucial for fostering innovation and supporting both patients and pharmaceutical companies.

Despite challenges, there is immense potential in Poland. Merck maintains a diverse portfolio, supplying established brands and innovative products across various disease areas, such as fertility, cardiovascular medicine, endocrinology, diabetes, multiple sclerosis, and oncology. However, reimbursement barriers have delayed the launch of innovative products in Poland relative to other EU markets.

The upcoming reimbursement of IVF in Poland is noteworthy, reflecting positive changes. Merck is a global market leader in fertility with significant experience, science and expertise in this area.

However, while access to medication remains a challenge, Merck aims to go beyond mere product supply. With a mission to help create, improve and prolong the lives of patients, the ultimate goal is to ensure patients receive necessary medication promptly, prompting efforts to improve patient journeys through technology and partnerships. Overcoming healthcare system challenges in Poland is a priority for Merck to accelerate patient access to vital treatments.

EF: Could you provide more details about Merck's presence in Poland and the nation's strategic importance to the group?

PK: In Poland, our three sectors— healthcare, life sciences, and electronics—are well-represented. *Our healthcare business effectively reaches the market, providing patient access to medications and conducting ongoing clinical research, with over 45 trials completed and 18 currently underway involving more than 750 patients across 100 clinical research sites across Poland.*

Our life science sector is integral to domestic pharmaceutical businesses, supplying products, services, and reagents. It also supports research and development by being

a key supplier to approximately 90 percent of Polish universities. Finally, our shared service center in Wroclaw, which is one of only three such centers globally for Merck.

“ In total, we employ close to 1000 employees in the country, a number which has and continues to grow consistently. This is because Poland offers exceptional access to talent, language proficiency, and a highly qualified technical workforce. ”

We also have a unique regulatory hub in Poland, reflecting the country's highly educated and motivated workforce, which the organization actively supports.

As a European-based organization, Merck is a key partner to help ensure security of supply. Twelve out of eighteen of our product sites are situated in Europe where all of the products in our portfolio have manufacturing capability in Europe. 45% of our total number of employees are based in Europe (26,500 people across 32 countries, with 1,800 directly in R&D, and around 2,000 indirectly). However Merck also benefits from an international supply chain creating further balance, scale and security.

Governments should prioritize both short-term security of supply and but also security of supply of innovation. Europe's innovation performance has declined over the past two decades, with a widening R&D investment gap between the US and the EU, now at \$25 billion. China's increasing prominence in R&D spending further emphasizes the need for strategic planning. Europe attracted 41% of global R&D investment 20 years ago, but in 2020 this was reduced to only 31%. In the period 2015-2020 Europe attained 17% of global clinical trials compared to 64% in the US.

Concerns arise from the current EU pharmaceutical strategy review, where the current balance between affordable access to innovation and supporting innovation is at risk of getting the balance wrong. Specifically proposals, such as reducing regulatory data protection and narrowing of the definition of unmet medical need (UMN), may exacerbate the already widening innovation gap with the rest of the world. *The security of innovation is crucial to avoid being at the mercy of higher priced innovation imports into the EU in the future.*

Understandably, affordability and access to current innovation is an essential concern for all governments. However, taking a value-based approach to pricing medicines could be a better solution to manage costs and optimize patient outcomes while also encouraging and stimulating the right kind of innovation from the industry. This is not a new idea but its adoption into practice remains problematic. This is where better partnership and collaboration could help accelerate progress by leveraging data, negotiating innovative pricing models, and risk-sharing. This could really help manage affordability and foster innovation simultaneously. As always, the challenge lies in finding a

balanced approach that benefits patients, payers and supports innovation in the industry.

EF: Could you please describe your portfolio in detail?

PK: Poland not unlike other EU countries is having disease burden in specialised areas, such as multiple sclerosis and certain oncology treatments where Merck operates. That is why there is a drive to bring new innovations to the market. However, in Poland, there still exists a gap in disease areas that have been largely and more successfully addressed in other countries. For example, if you look at the treatment rate of hypothyroidism compared to what you would expect as an incidence level, patients in countries like the UK and France seem to have high diagnosis and treatment rates. *However it appears that there may be higher levels of undiagnosed and untreated patients in Poland. There is a significant proportion of patients in Poland who, we assume, have the condition but have not been diagnosed. Furthermore, there are people who are diagnosed but not treated. We are actively involved in trying to understand this situation more deeply. We are also looking into how can we partner with healthcare providers to improve the diagnosis rate and patient treatment. There is a burden, but the pattern of that burden might be different to other markets.*

EF: How are you leveraging the common spaces in INEARMA, and what are the trends that you are seeing when it comes to the discussions that you are having in the Union?

PK: Companies within the industry share a strong sense of unity, recognizing common issues and sharing a collective passion. While trade organizations can sometimes be in reactive mode to external factors I really believe in also having a proactive approach to create a vision for our purpose and how we can address challenges in collaboration between industry and healthcare organizations. I really believe we can achieve more together for the benefit of society as a whole and help Poland reach its true potential through better healthcare.

Partnerships are key for R&D but I also believe a lot can be achieved in driving non-scientific innovation, focusing on innovative ways of working. Transparency, shared objectives, and commitments are vital in breaking down intellectual barriers between private and public entities. Despite differing goals, numerous examples, such as the collaborative efforts during the COVID-19 pandemic, demonstrate the power of organizations from diverse backgrounds coming together to solve shared problems. Through transparent dialogue and a shared commitment to benefiting patients and society, collaborative solutions are achievable. The primary obstacle lies in ensuring consistent communication and true dialogue.

EF: When it comes to attracting and retaining talent, what skill set do you require for the future?

PK: I assess situations based on the balance of challenge and support. The most fulfilling work environment, in my perspective, combines high challenge with strong trust and support. Regardless of the organization, *I strive to foster a culture where problems can be openly addressed with transparency and the right intentions. This atmosphere acknowledges and values individual differences, recognizing strengths and weaknesses as aspects to navigate collaboratively. Merck's high-impact culture aligns seamlessly with my personal philosophy. We need to always question ourselves and create a wave of positivity and motivation. When it comes to retention, we of course look at the same things as many organizations - rewards, terms and conditions - the tangible things. However, I think what really differentiates us is the culture and the way we treat people.* There is a genuine and consistent commitment to drive the business but also to develop employees and provide a great place to work where people can be themselves and feel great satisfaction in their work.

EF: If you had to create a road map for a sustainable healthcare system in Poland for the next 10 years, what would those be?

PK: *My first pillar would be to have a disciplined, dedicated focus on patients.* We need to fully understand patients' issues and challenges and design healthcare around them to optimise outcomes in the most cost effective way.

The second pillar revolves around the way that you treat healthcare professionals and the way that you support them. This will influence the way that they, in turn, treat and support patients. Productivity is very rarely driven by new procedures. Productivity is driven by engagement. There are challenges with affordability, some structural difficulties, and funding issues, but the best way of tackling those things is to get more out of less. The way to get more out of less is to have a highly engaged workforce that feels respected and supported and is also challenged to make a difference.

My third pillar would be partnerships. When you bring resources together and focus effort together, you are no longer fighting in opposite directions; you are moving in the same direction together. I would like to see a higher level of trust, openness, and partnership between public and private organizations for this reason.

EF: At the end of this year, what will you be most excited to celebrate? What is it that you want to accomplish this year with your team?

PK: This is a very personal and private goal, because I am half Polish and I have a deep emotional connection to the country. *I want to, in all ways possible, elevate Poland to the level of visibility, credibility, and respect that it deserves within the company.* I want Poland to move into the top five countries in Europe for Merck, which will bring greater positive focus onto the country for investment and also broaden the opportunities available to our employees working in Poland.

Geraldine Schenk

Country Director
Poland, Johnson & Johnson Innovative Medicines



EF: You have recently been appointed. What was the mission that you established for yourself and your team?

GS: Johnson & Johnson Innovative Medicine ranks among the top 10 pharmaceutical companies in Poland's pharmaceutical industry. Based on our future initiatives and the innovative treatments we intend to introduce to patients in the Polish market, we aspire to be one of the top 3 pharmaceutical companies. Our confidence in achieving this stems from our commitment to delivering innovative medicines that impact patients' lives. A significant reason behind our belief lies in the robust pipeline being developed by Johnson & Johnson Innovative Medicine, which is among the industry's leading channels. Importantly, our focus extends across five disease areas, with more areas to come.

Our mission revolves around three key principles. Firstly, we pledge to continuously bring innovative treatments to our patients in Poland, refusing to settle for anything less. Secondly, we spearhead discussions to accelerate market access and advocate for value-based healthcare that grants patients access to innovative health solutions. Lastly, and perhaps most crucially, our people. We aim not only to become an employer of choice in the pharmaceutical industry but to be among the most attractive related to learning, grow and career opportunities, empowerment, and attractive working conditions. This involves fostering an innovative work environment and cultivating our existing talents while attracting prospective ones while embracing diversity, equity, and inclusion respecting our J&J Credo values, which are building our foundation of thinking, acting, and decision making since more than 135 years.

EF: Could you elaborate on how your key therapeutic areas impact the market in Poland?

GS: Our pipeline in oncology is truly groundbreaking, revolutionizing the treatment landscape. Our oncology products bifurcate into hematology about blood cancers and solid tumors. In multiple myeloma, we are pioneering new combinations that make a more pronounced impact from the outset, optimizing patient treatment outcomes. Our focus is to initiate therapy with the most effective options upfront. This allows physicians to influence patient outcomes significantly right from the start. Lung cancer poses a significant challenge in Poland as one of the most prevalent cancer types. In lung cancer, we aim to identify the right patient for the precise treatment at the ideal time. This novel approach merges diagnostics with treatment, leveraging our expertise in MedTech. In immunology, we are driving a paradigm shift in treating conditions like psoriasis, psoriatic arthritis, and inflammatory bowel diseases. By introducing new modes of action, we are committed to ensuring that patients can access these advanced treatments. Less than 5% of psoriasis patients have access to these biological treatments in Poland, and it takes sometimes up to more than 5 years before a treatment with a biologic will be considered. Our mission is not only to provide access but also to catalyze a fundamental shift in this domain.

In neuroscience, we have been making significant strides for over 50 years. We have redefined the approach to treat schizophrenia, epilepsy, or multiple sclerosis. With the introduction of a new treatment option for treatment resistant depression, after 30 years without innovation, shows our continuous commitment for patients suffering from neurological diseases. Upholding our founder's legacy, Dr. Paul Janssen, we are dedicated to alleviating the stigma associated with mental health issues. Additionally, we have ventured into vaccines in cardiovascular and infectious diseases and realized that we might need to rethink our strategies. Instead of following conventional routes, we are exploring

new pathways, looking at the root causes of these diseases, and devising innovative treatment approaches. This applies to our practice in addressing stroke, which lacks adequate treatments, and our continued efforts in HIV treatment or other infectious diseases treatment, where we have transformed the landscape but believe there is more to be done.

“ In various medical domains the impact of illnesses transcends the patient; it touches their entire social circle, their family, causing life-limiting effects not only on the individual but also on those close to them. The silent pandemic of depression holds a special place because it not only stigmatizes the individual but also affects their family. ”

From a personal standpoint, as a mother of two young boys, if they were to suffer from psychiatric illness, the weight of responsibility feels heavy.

Consequently, the burden falls heavily on both the patient and their family. To address this, we have undertaken various initiatives. We have engaged in activities on Mental Health Day, hosted webcasts, and supported sports events, such as running for depression or cycling for multiple myeloma, to raise awareness about disease. Additionally, our involvement in initiatives like cycling for children in SOS Children's Villages has been impactful, where we have contributed thousands of kilometers cycled for charity.

EF: Could you elaborate on how does the new Johnson & Johnson Innovative Medicine impacted your operations and structure?

GS: Our focus truly centers on healthcare. Our research and development initiatives overlap, which increasingly align with our medical tech colleagues. As we visit the same customer base in certain disease areas, we see an opportunity to harness this unique positioning more effectively. For instance, in lung cancer, where we leverage diagnostic tools from MedTech combined with our treatments, we aim to cover the entire patient pathway - from diagnosis to treatment and recovery. This integrated approach is a significant strength we have perhaps not fully utilized. Now, we are poised to capitalize on these synergies more effectively.

Additionally, opportunities are emerging in bladder cancer, precision medicine, and even vision care. By leveraging customer base and healthcare provider overlaps, we aim to create a more unified external presence under the J&J brand. While maintaining our business identities, this closer internal alignment promises increased opportunities for cross-sector collaboration, maximizing patient outcomes.

EF: How do you effectively attract and retain talent that aligns with the mission and vision of Johnson Innovative Medicine for the future?

GS: We are employing several key strategies to address talent development within

the organization. To attract new talents, we are prioritizing a robust employer branding strategy. As we enter a new generation with unique expectations around work-life balance and professional growth, aligning with our company's philosophy offers vast opportunities to meet these evolving needs. Simultaneously, we acknowledge the strong pool of talent already within our organization. Clear and concise development conversations are crucial to nurture and advance this talent. These discussions revolve around defining target roles and how to prepare individuals for these positions, emphasizing strategic thinking and career ownership. We encourage team members to consider roles beyond their immediate next step, as each step prepares them for their ultimate target role. This clarity in career direction is pivotal.

Secondly, it is paramount to create development opportunities aligned with our strategy and market needs. We constantly evaluate the drivers of development and the necessary capabilities, creating new roles that align with portfolio development. We have established lateral moves and new roles for high-potential talents to gain first-hand leadership experience. Despite our lean structure, these opportunities exist and are vital for growth.

Lastly, we encourage our team members not to rush their career trajectories beyond

attracting talent and defining career paths. Instead, we advocate for lateral moves and diverse experiences across our various disease areas and functions within J&J. This move significantly enriches knowledge, leading to a solid foundation for future career acceleration within the company's broad portfolio of roles and disease areas. This emphasis on owning one's career path while gaining diverse experiences lays a robust groundwork for future career ambitions.

EF: What would you like to celebrate?

GS: I believe my greatest source of pride will be witnessing the outcomes of our organizational adjustments. Firstly, received feedback indicates that our focus on team empowerment and creating developmental avenues has been the right move. We are not just addressing individual needs but also aligning with market demands. Secondly, I will be immensely proud if everyone could discern their unique contributions toward our collective vision. *My most significant achievement would be team members recognizing the purpose behind their daily efforts and understanding how even small contributions add to the larger goal of positively impacting patients' lives.* Lastly, the ultimate sense of accomplishment will come when we achieve our objectives.

Janis Meiksans

Former General Manager
Teva Polska



EF: Teva is a unique company, having a 'one of a kind' business model. How do you see the upcoming years for Teva, as a challenge or an opportunity?

JM: To provide a comprehensive perspective, it is essential to zoom out and grasp the broader context. Teva operates on the foundation of generics and innovation, including biosimilars. Such strategic setup has spurred considerable debate within academia and the industry, as this approach is different from traditional go-to-market models and corporate structures.

Teva's unique strategy is underpinned by a simple yet powerful concept: the stability derived from our robust generics portfolio, which boasts an annual global sales figure exceeding 8 billion dollars. This stability allows Teva to diversify into innovative pipelines, a move we call 'Pivot to Growth', which will provide incremental growth.

Generics are extremely important for us as the business foundation allowing Teva to develop exclusive collaborations such as the one we have now with Sanofi to deliver inflammatory bowel disease treatment. These types of projects have direct implications in Poland and the broader European landscape.

EF: Could you elaborate on the trends of therapeutic areas within Poland?

JM: In Poland, Teva faces distinctive market dynamics that demand adaptability. Despite these challenges, I take pride in Teva's robust position. Our focus predominantly lies in generics and OTC products. These segments, especially CNS (Central Nervous System) and antimigraine treatments, hold significant importance in our local context. On a global scale, our attention is on CNS, including noteworthy innovations for migraine. While these areas have their impact globally, the situation in Central and Eastern Europe, especially Poland, presents unique hurdles. The CEE region, including Poland, experiences a lower GDP per capita compared to most Western European countries, influencing factors like reimbursement and access to expensive innovative medications.

EF: Could you elaborate on your operations in Poland and Central Eastern Europe?

JM: For many years Teva's strategy for growth relied on mergers and acquisitions. Thanks to them, at the moment, Teva has over 20 European manufacturing sites, and 8 of them are located in Central Eastern Europe. This positions the region as a production powerhouse. One of the sites is located in Krakow. In this facility, we produce solid forms, liquids, hormones and granulates - generics and OTC products. We produce for internal and external consumption within the EU. More than 500 people work there. In Hungary, Romania and the Czech Republic, we also have several manufacturing sites. When it comes to biologics, Teva has two sites in Europe. One of them is located in Ulm, Germany, and the other one is in Vilnius, in Lithuania.

“ In Teva we are also proud to produce API within Europe, providing the region with self-reliance and maximizing security of supply. ”

EF: How do you assess the level of awareness of prevention in Poland and Central Eastern Europe, and what initiatives can be performed to increase the level of prevention?

JM: *The way I see it, prevention is not only about products that prevent diseases, but even more importantly about education. Working on better habits and improving lifestyles could, for example, support the effectiveness of treatments in Type 2 diabetes or even mitigate their increasing number. It is an imperative for pharma industry to invest resources on this front.*

Also other areas, such as mental health, are where prevention can bring positive change. Addressing the challenges related to psychiatric and psychological issues is important, because such problems often leads to burnout and other health difficulties. Unfortunately, these concerns are sometimes overlooked, even by medical professionals, who might dismiss them, for instance, as mere headaches. At Teva, we are committed to fostering a workplace culture where such issues are taken seriously, and individuals receive the support and understanding they need – as it is in case of people suffering from migraines.

I believe in power of education and raising awareness - armed only with tablets and shots, we may not be able to improve people's health in the long term.

EF: How do you attract the talent that shares the same vision that you have?

JM: The complexity of both our industry and life demands a level of expertise that goes beyond traditional education. Talent has emerged as a key driver of success for many companies, in pharma sector as well. A talented workforce can elevate a company's prospects, while the absence of skilled individuals can impede progress significantly.

While there is no shortage of talented individuals, they are in high demand and often geographically dispersed, additionally having personal commitments that restrict their mobility. When faced with such situations, it's crucial to make strategic decisions. *Placing functions where the talent resides, even if it means establishing operations in different cities or moving positions, has proven successful for us in Teva. To attract exceptional specialists in their fields, we align our approach with their needs. By doing so, it's a mutually beneficial arrangement - talented individuals find a workplace that suits them, and Teva gains the expertise necessary for growth.* There are many examples in this regard in our CEE team, with leads for innovative medicines or ESG being one of them.

EF: As you have been in this role for a year now, what would you like to celebrate, and what are you expecting for the next year?

JM: Thank you for your question, I'm glad you asked because I wanted to share an important development from my first year in this role. We undertook a significant organizational change in the Polish team, shifting our focus towards customer-centricity. While many CEOs claim to prioritize customers, the real challenge lies in the organizational structure. Traditionally, multinational companies organize themselves by therapeutic areas, but we decided to take a different approach.

In Poland, we have recently implemented a new organizational design based on major customer groups. Now we have dedicated divisions for pharmacists, medical doctors, and end users. Each division is supported by a customer excellence manager responsible for understanding the specific needs of that customer group. Such a customer-centric approach is unique in the pharmaceutical industry and has the potential to set a new standard.

Harry Nardis

General Manager
Poland, Czech, Slovakia, Ukraine, Astellas



EF: Poland has been showing good economic growth compared to other EU countries. Do you see the upcoming months as a challenge or an opportunity?

HN: Poland's macroeconomic environment indicates that we should have a positive outlook because the Polish economy showed strong resilience during the pandemic and despite high inflation rates. *Even some turbulence around the world with the conflicts in Ukraine and the Middle East will not have a strong negative impact because of Poland's geographic position and its key strategic role in the area.* But on the other hand, Poland also has many unmet medical needs. As the Astellas, we will support stakeholders, experts, and patients to limit unmet medical needs because our vision is to bring value to patients.

EF: What is Astellas' footprint in Poland, and what are your regional priorities?

HN: I lead a cluster affiliate covering Poland, the Czech Republic, Slovakia, and Ukraine, addressing a population of about 100 million people. We have four office sites, and Warsaw is the central hub for our operations in all four countries.

Astellas' commitment in Poland is quite large. While Astellas does not have a manufacturing facility in Poland, our commitment to the market is substantial, and we are working diligently to introduce all our innovative drugs in Poland. I want to highlight our dedication because obtaining reimbursement for innovative medicines is sophisticated.

Our commitment is to show the value of our medicines and introduce them to Polish patients as soon as possible. *In the last two years, we got reimbursement for three innovative molecules, which is quite an achievement considering the circumstances. This means, to be more precise, that all our new molecules are currently reimbursed.* Now, we are waiting for new registrations, and of course, we are working on ensuring the continuation of the reimbursement for our more mature products. It is worth emphasizing the dialogue with the Ministry of Health and the improvement in the area of access to innovative treatment that has occurred in recent years.

EF: What does access mean to you, and what action levels should be put into play that can allow for improvement of access?

HN: *Access is about patients. Anything else is an obstacle. When talking about access, we must remember that patients are waiting, and those patients must not be left behind.* This is something that I am passionate about because sometimes authorities only focus on costs. All they can think about is a rigid number. I'm trying to understand their point of view, but *in my opinion, health is not a cost; it is a societal investment because it is built for the well-being of the citizens, who then build the country's economic resilience.* Poland, like many other EU countries, focuses on cost containment measures.

There are better ways of dealing with your citizens' access to healthcare. I am passionate about discussing the value our medicines bring to society. I am proud that we have discussed and demonstrated this to the Polish authorities in the last few years. *There is science behind this; value is not a number or a price. Value is the ratio of outcomes that matter to patients over the cost to the healthcare system of delivering those outcomes. This is what we have to show. If the balance is positive, then it is worth the investment.*

EF: How does Astellas enhance patient outcomes in Poland, and what are your primary therapeutic areas?

HN: Our main focus areas are oncology and hematology, with prostate and bladder cancer and acute myeloid leukemia treatments, for which we have received reimbursement (in prostate cancer with some limitations). We also recognize the need to preserve the value of our legacy products because they are also important. For example, we have a strong portfolio in transplantation, and Astellas is a leader in the Polish transplantation market. We want to remain close to the patients in that important area.

We would also like to introduce the innovative technologies and therapies that Astellas is developing. For example, we are going into ophthalmology, specifically geographic atrophy in age-related macular degeneration, which we look forward to. *We are lucky because we have a rich product pipeline and are committed to bringing that to Polish patients to improve their quality of life.*

EF: Your motto is "Changing tomorrow, today." How does this translate to Astellas' role in the pharmaceutical industry in Poland?

HN: Our efforts are internal and external, emphasizing employee involvement in activities that support the creation of a sustainable society. *We believe in sustainable growth within society achieved through collective contributions. Astellas aims to be an active member of associations, advocating for the role of the innovative industry in Poland and actively shaping the environment. Changing tomorrow is both internally and externally focused.*

“ Internally focused means that we want every employee in Poland to be actively involved in activities outside of their normal work that have the potential to help create a sustainable society. This can include philanthropic work or other actions supporting people in need, such as volunteering. ”

They volunteer to support local communities and societies through activities, donations, or anything else that could support Polish society.

We believe in sustainable societal growth and must do that through all our employees. It is not done by me alone; all our employees do it through their contributions to the community. I think that is the spirit of changing tomorrow. We strongly believe in that, and I am trying to cascade that to every level. It does not matter which position you are in.

EF: What role does Astellas play in advancing gene therapies in Poland?

HN: Gene therapies will be coming in the next few years. They are part of our corporate strategic plan. We will need to see how to approach this because since it is very innovative, we must convince the Ministry of Health about the value of financing costly lifesaving therapies.

Regarding the strategy on how the healthcare system can finance this sort of therapy, *I think that as an innovative industry, we have to be aligned because the budget is specific; it has to be allocated somehow.* The unique possibilities

of gene therapies are something that we will need to align within the association.

EF: On the prevention side, how do we make awareness an investment for the future? How do we create this urgency?

HN: Astellas invests in awareness campaigns and cooperates with patient associations and stakeholders to raise awareness about diseases like prostate cancer, including running a self-funded campaign involving the Ministry of Health. *This campaign is aimed at prostate cancer because it is a disease that can be managed if it is detected early enough and can be a lifelong treatment; it does not have to be fatal.* We are investing in this because it helps patients manage the disease proactively.

We are doing the same thing in the transplant portfolio. We are working with the transplantation society, surgeons, and the Ministry of Health to find a way to increase awareness about organ donation and help surgeons or hospitals identify possible donors according to their state.

EF: Could you elaborate on concrete initiatives for bringing innovation to Poland?

HN: Earlier, I touched on the ophthalmology area that Astellas recently entered with the geographic atrophy age-related macular degeneration. It will be the first therapy registered in this indication! We are very excited to bring this into Poland, but the European Medicines Association (EMA) has not yet approved it. This is still under approval. Oncology and hematology are already bringing innovation to Poland.

EF: How does Astellas attract and retain the best talent aligned with its mission?

HN: I think it is all about values. *We must ensure that the values of the company are aligned with the values of the people working for it. We need to ensure*

that the Astellas values exist in the people working for Astellas in Poland and the candidates we would like to attract. This is important because, nowadays, most companies, more or less, have the same HR policies and benchmarks against each other.

The difference between attracting and retaining talent is not only monetary or benefit-related. However, we aspire to be competitive because people must work for practical reasons. *To go the extra mile and excel in what we are doing, we need to have passionate people who are passionate only if their values align with the company's. We believe in that. Many leaders can communicate effectively, but it is important to be consistent with these values daily and make decisions that prove you believe in them.* That is the only way people can connect, engage, and be passionate about their actions. This is even more important now with the existence of remote and hybrid ways of working. We are committed to supporting flexible working methods, and work-life balance is important. How do you keep your people connected to the company? One common goal, one common passion.

EF: You will be celebrating 20 years at Astellas next year. What would you like to celebrate? What are the biggest milestones you would like to toast?

HN: I would like to celebrate my impact on the people I have worked with and how I have positively changed their lives. I want to celebrate my mark on the markets I have worked in and the patients I have reached. *Reflecting on those years and every activity I was involved in, I want to remember how positively I impacted the people I've worked with and touched patients' lives through my work.*

If you are passionate about what you are doing while being very clear about your goals as a leader and as a person, then whatever you do will have an impact and be successful. I think that should be our guiding light in life. Be the best you can, and the rest will come.

Cristiano Costanzo

VP & General Manager
GSK, Poland



EF: Considering Poland's recent transformations, how do you perceive the challenges and opportunities in 2024?

CC: Poland stands poised for remarkable growth across various sectors, notably in healthcare. However, seizing this opportunity hinges on expedited progress under the new government's leadership, especially in healthcare. Clarity regarding the significance of this area of investments is imperative, while the importance of healthcare investments cannot be overstated. Healthcare is important to Polish people.

The current 827 days from drug registration to reimbursement listing is untenable for improving healthcare outcomes. Poland lags significantly behind its EU counterparts, with Germany and Austria boasting much shorter timelines of 120 and 300 days, respectively. Such delays are particularly egregious in critical areas like oncology and infectious diseases, prompting patients to seek treatment abroad. We need to encourage dialogues with institutions to underscore the necessity of investment in innovation while addressing these challenges.

EF: Could you provide further details about your presence in Poland and explain the strategic significance of your operations there?

CC:

“ For 45 years, we have been increasing our commitment to Poland. Our substantial investments have been instrumental in bolstering the local economy. Poland is a strategic location for key global functions such as technology, HR, procurement, and finance, with our international R&D team focused primarily on clinical operations. We have experienced a threefold expansion in the past two years, from 200 to 600 professionals. ”

Our commitment to Poland is further demonstrated through the 52 ongoing clinical trial projects, encompassing innovative products across various fields, such as infectious diseases, oncology, and specialty areas like HIV.

This shift towards prioritizing knowledge capabilities marks a strategic evolution, positioning Poland as the second global hub for GSK's R&D activities. Additionally, we have a multi-market warehouse near Poznan, in Gądko, a strategic distribution center for pharmaceuticals sourced from worldwide manufacturing sites. With similar hubs in Italy and France, this move not only streamlines our supply chain but also enhances our ability to cater to the demands of the Polish market and Eastern European and Nordic regions.

EF: What skills do you seek when recruiting talent, and what strategies do you employ to retain that talent?

CC: We are seeking individuals who thrive in challenging environments and are eager to contribute to our evolving portfolio. GSK Poland has shifted its focus towards innovation, particularly in oncology, vaccines, specialty products, and HIV-related items—a unique opportunity for talented professionals to work on cutting-edge products rarely found elsewhere.

Retaining talent is paramount and achieved through a robust talent development plan spanning all levels. This plan goes beyond standardized processes, with clear objectives for managers to cultivate a pool of individuals ready to contribute immediately. We monitor and support the evolution of employees' capabilities, offering opportunities for global challenges.

While competitive compensation is important, we focus on structured and clear development paths for long-term satisfaction. Personal and professional growth opportunities are central, ensuring every team member, including leadership, understands their development areas and potential opportunities for advancement.

EF: Could you provide insights into the portfolio's performance, particularly in Poland?

CC: We are actively reshaping our portfolio, focusing on prevention and vaccination, critical areas often overlooked in the country's healthcare landscape. We firmly believe in prevention—an investment of one euro can yield savings of three euros by curbing diseases and associated costs. *Expanding vaccination opportunities is a key priority. Last year, we introduced a vaccine for shingles in adults, broadening preventive measures beyond childhood.* Additionally, in oncology, we are addressing challenges such as high treatment costs by exploring risk-sharing agreements and streamlined drug plans for timely access. Collaborating with patients, expert associations, and healthcare stakeholders is paramount. Tailored approaches, like specialized asthma management teams and efficient local testing in oncology, are essential for prompt treatment.

EF: Could you share insights into initiatives that can be considered to enhance awareness, education, and prevention?

CC: *The company is committed to vaccination and conducts disease awareness campaigns.* Efforts include educating those affected by shingles and fostering dialogue with healthcare institutions and professionals, including collaborations with associations and physicians.

Another critical focus is improving treatment for severe asthma patients. Collaborating with respiratory associations, the company compiles real data into comprehensive reports, highlighting treatment gaps and system challenges. Similar oncology initiatives demonstrate the company's commitment to patient well-being.

EF: As you are approaching the milestone of two years in Poland and 20 years with the company, what specific achievements and milestones of your tenure are you most proud of?

CC: I've transitioned from valuing performance metrics to finding fulfillment in the impact on people's lives. Working across diverse markets, I have witnessed colleagues ascending to significant roles outside our shared companies.

My time in this country has reinforced the importance of human connection. Witnessing former colleagues' progress, some now in global positions, brings immense satisfaction. I emphasize the value of helping others, not solely for financial gain but for personal fulfillment.

Sławomir Szymankiewicz

General Manager
Poland, Haleon



EF: Could you elaborate on the role Haleon has come to occupy in the market and its strategic importance?

MS: Our mission is to deliver everyday health globally, including here in Poland. As a leading consumer healthcare company, we boast top-tier brands with a long-standing history. At the same time, our commitment to society extends beyond delivering the highest quality products, to promoting conscious self-care based on reliable health information.

The current trend of heightened health consciousness, accelerated by the COVID era, has prompted us to focus on driving self-awareness and self-care.

“Our “Redefining Self-care” report indicates that while 80% of individuals plan to prioritize their health, only 20% feel adequately informed”. We aim to bridge this gap by championing health literacy, a holistic, healthy lifestyle, and mental well-being.”

In line with this, we actively participate in influential events like CEE Impact in Poznan and the CEE Economic Forum in Karpacz, where we discuss and create alliances with medical professionals, pharmacies, nurses, and physiotherapists. These partnerships aim to facilitate the delivery of basic patient needs while saving time and resources in the healthcare system.

Recognizing the potential of pharmacies as the first line of health supervision, we advocate for comprehensive legislation on their role in self-care and prevention and work closely with the pharmacy sector to expedite these changes. As an active member of PASMI, the Polish branch of the Association of the European Self-Medication Industry, we collaborate to drive the self-care agenda. Beyond delivering top-quality products, we are committed to fostering the well-being of the people in Poland through diverse initiatives and partnerships.

EF: What is Haleon’s footprint in Poland, and what is driving its growth?

MS: Our well-established, large-scale multinational brands play a pivotal role across various categories, contributing to the diversified growth of our business. We have a strong position in all categories in which we are present in Poland. The expansion is fueled by distinct sources depending on the category. For instance, in the topical painkillers sector, we actively educate pharmacies on the safety and efficacy of using topical gels for pain relief.

Our commitment extends beyond sales. We strive to adopt a holistic approach to health and promote preventive measures. We focus on raising awareness of how our products address common issues, for example, sensitive teeth and bleeding gums. Shockingly, two-thirds of those affected by these problems don’t use any solutions, and our educational efforts aim to bridge this gap. We prioritize being a patient-centric company, emphasizing everyday health and an improved quality of life.

While we don’t have production facilities in Poland, it is a crucial location for Haleon. Poland is our biggest market in Central-Eastern Europe, home to CEE headquarters and Haleon Hub, which supports Haleon processes globally, including a financial hub supporting a significant part of EMEA, a pharmacovigilance safety European hub in Warsaw, and a procurement and

tech hub housing IT, artificial intelligence, and digital commerce teams for EMEA. *Despite lacking production operations, Poland is a key location for Haleon due to the size of the market and its location in the center of CEE and strategic hub centers.*

EF: What three pillars do you consider to be critical in driving sustainable healthcare in Poland?

MS: In my extensive 30-year tenure at GSK, my focus has been exclusively on consumer healthcare rather than pharmaceuticals. From this perspective, making better everyday health more sustainable is fundamental to our business. We have set commitments to reduce environmental impacts, such as reducing carbon emissions by investing in renewable energy, reducing carbon emission-intensive raw materials or packaging materials, reducing virgin plastic, making all our packaging recyclable or reusable by 2030, or optimizing product distribution.

Our sustainable business approach extends to patient-centric practices, emphasizing real needs over artificially driving product demand. We prioritize responsible business by promoting drug access, health literacy, and a culture of self-care and healthy lifestyles. This approach aligns with sustainability goals, preventing overuse and misuse of drugs, which can have adverse environmental and societal effects.

Ensuring the well-being of our employees is integral to our sustainability strategy. Various programs and systems support work-life balance and mental health. Initiatives include online access to coaches, mental health specialists, no meeting days, short Fridays, and innovative work structures. As a leading company, we offer a hybrid work model, paternity leave, and other benefits that enhance employee satisfaction and attract top talent. Our environmentally conscious office design, accommodating two people per desk, reduces commuting, further contributing to a healthier work-life balance.

These initiatives not only foster a healthy work culture but also serve as industry benchmarks, demonstrating our commitment to sustainability and employee well-being.

EF: You’ve been in Haleon for a year and a half already. When you raise your glass to celebrate two years, what will you celebrate?

MS: Firstly, post-spin-off from GSK, our commitment to employee satisfaction remains strong, as reflected in our positive workplace culture. Employee surveys consistently show great pride in working for Haleon, and our recommendation scores for friends and family as potential colleagues are exceptionally high. Secondly, our business successes are notable, with increased product penetration benefitting more individuals in Poland. This growth showcases the effectiveness of our products and our ability to reach a wider audience. Lastly, since the spin-off, our enhanced visibility in the external landscape is a significant achievement. *With our independent agenda, we’ve made strides in impactful collaborations, especially in healthcare scenes, fostering a stronger presence.* This change is pivotal compared to our earlier status within GSK, where our agenda was somewhat overshadowed.

In essence, these three key aspects—employee satisfaction, business success, and external visibility—will be the focal points of my discussion with the team when we celebrate two years of Haleon’s commitment to the Polish population, and your question has been instrumental in shaping my message. I appreciate your contribution as we head into the year-end, and I look forward to sharing these positive developments in July.

Ioana Parsons

Former General Manager
Poland, Ipsen



EF: From your perspective and that of Ipsen, how do you see the upcoming year - as a challenge or an opportunity?

IP: As we step into the post-election period in Poland, there is a lot of work to be done, especially as the macroeconomic climate still struggles with inflation. September was the first month in over a year when we saw single-digit inflation.

Regarding the pharma world: since November 1st, we have a new Reimbursement Law. This has been under discussion since before I arrived in summer 2021. As with any legislative change, the implementation of some provisions still needs to be clarified. Leadership changes in the public administration after the elections add complexity to the current healthcare environment, as some of the stakeholders to partner with will be new. Despite this, *we embrace innovation and change, and we're committed to finding solutions. While we can't predict every change, we hope that the pro-patient trend observed in recent years in healthcare – and in the reimbursement of innovative medicines specifically – will continue and accelerate.*

What also needs to continue is the open debate between representatives of the public and private sector, together with patient representatives. This kind of exchange, already established in various healthcare fora (e.g., as part of the Economic Forum in Karpacz), is a sign of transparency and willingness to continue to improve the healthcare system for the benefit of Polish patients.

Looking beyond Poland, 2024 will be crucial for preparing for the Polish presidency of the Council of the European Union in the first half of 2025 – considering the proposed reform of the European pharmaceutical legislation. *A strong Polish voice could make the difference in reaching the declared aims of the legislation, for Europe to be a world leader in innovation and to create faster, more equitable access for patients, instead of causing potential adverse impacts, such as losing out on R&D competitiveness, as detailed in EFPIA's Dolon report.*

EF: Can you elaborate on how to promote partnerships to advance healthcare in Poland?

IP: *Communication is the foundation to promote partnerships and advance healthcare. Stakeholders need to talk with one another.* For example, the Warsaw Health Innovation Hub actively supports projects initiated by pharmaceutical companies to enhance their impact. Ipsen has been a partner since January 2023, and they recently endorsed the two projects we have been discussing, both in the field of neurology. Patient organizations also play a crucial role when it comes to creating sustainable partnerships. They're becoming more organized and influential in many countries, including in Poland. They must be part of the conversation and have a strong voice, especially in disease awareness campaigns, patient education and access.

In our case, we educate and partner with doctors and patient associations to inform patients and their families about symptoms and conditions of diseases. For example, in the field of acromegaly, we've worked on awareness campaigns for over a decade. These really helped increase self-diagnosis. The rate of self-diagnosis of acromegaly in Poland, without a treating physician's intervention, is 12% - much higher than the European Union average (2.3%). *Collaborating with patient organizations for the greater good is a significant and rewarding part of our work. Seeing the positive results motivates us to continue.*

In summary, collaboration spaces in Poland are abundant when there's good faith and shared objectives.

“ We're committed to our mission of bringing innovative medicines to patients with high unmet medical needs, making a real impact on patients and society. We have launched at least one new drug or meaningful indication every year since I've been working in Poland, and we aim to continue to do so in the future. ”

EF: How do you apply Ipsen's motto 'Innovation for patient care' to advance patient centricity as a team?

IP: Innovation is ingrained in our DNA. *Our focus areas are oncology, neurology, and rare diseases, and for us, focus means innovation, both in our research labs and in our business development efforts. On the external front, we partner with biotech and academia to bolster our innovative pipeline.*

We define success by the impact we have on patients' lives and on society as a whole. When patients do better, their families and communities as a whole benefit – because it is families and communities that care for patients. Therefore, our philosophy is centered on prolonging and improving lives and health outcomes, not just extending lives. It's all interconnected: our industry, patients, and society.

EF: How does Ipsen support a preventive health paradigm in light of an aging population?

IP: In Poland, the retirement age is 60 for women and 65 for men. In line with European trends regarding lifespan, *many people live more than 15, or even 20 years after retirement, so there is an imperative need for them to maintain good health and stay active in their communities.*

Data from the Polish Central Statistical Office on projected population by age shows almost 450 thousand people will be 75 years old in 2030 vs. 225 thousand in 2020. *Aging populations will require more healthcare, underscoring the importance of prevention and early diagnosis. Interestingly, many children born today are expected to live beyond 100 years. This changing demographic landscape is a considerable shift in terms of healthcare needs.* As a society, we've talked about prevention for a long time, such as staying healthy and active, getting enough sleep, and having a balanced diet. However, there's still work to be done, especially in countries like Poland, to raise awareness about regular check-ups and early diagnoses, which can be lifesaving, particularly for diseases like cancer. It's not about corporate pharmaceutical interests, but about our collective mission to educate and ensure people receive the care they need.

The pandemic also brought to light the consequences of delayed medical appointments and treatments. It led to excess deaths, a concern we must address, particularly considering the aging population. Poland experienced a significant impact in this regard due to swift lockdown measures.

In summary, the changing demographic landscape, increased lifespans, and the impact of the pandemic emphasize the need for proactive healthcare, prevention, and early diagnosis to ensure the well-being of our aging population. The work the Ipsen team does on awareness campaigns, from renal cell carcinoma to neuro-endocrine tumors and from prostate cancer to spasticity, is an integral part of our contribution to improved health outcomes.

EF: Can you elaborate on Ipsen's footprint in Poland and the portfolio performance?

IP: Ipsen's global footprint is substantial, with over 5,000 employees worldwide. While we have large research centers and manufacturing facilities worldwide, our focus in Poland is primarily on educational, commercial, and medical activities.

More than half of our Polish team works in the field, including key account managers, regional medical advisors, sales representatives, and access specialists. We have dedicated teams for each therapeutic area, oncology being the largest. In oncology, we focus on the treatment of solid tumors (such as renal cell carcinoma, hepatocellular carcinoma, neuroendocrine tumors, prostate cancer and thyroid cancer), while expanding our efforts in the field of hemato-oncology. Our efforts go beyond promoting our products; we also focus on educating about various medical conditions and solutions. This includes collaborating with experts, medical societies and patient organizations to create patient education materials and programs.

In neurology, for example, where a significant unmet need exists in Poland for treating patients with botulinum toxins, we provide numerous training workshops, especially for injectors dealing with conditions like spasticity and dystonias. Building physicians' skills is vital, as they play a crucial role in patient treatment.

Another notable initiative is our first patient support program in Poland. I recently visited two of the centers taking part in this program that we've developed in partnership with key opinion leaders and an experienced local service provider. The program focuses on supporting patients at risk of developing spasticity, a condition that can occur after a stroke. 6 in 10 stroke survivors will not suffer from spasticity, but for those who do, early detection is crucial for effective treatment and quality of life. Our patient support program, designed for 1,500 patients, allows ongoing monitoring. This provides psychological reassurance to patients and includes questionnaires where trained coordinators assess their symptoms and well-being. We hope our efforts in this area can positively influence the healthcare system, by providing a model of coordinated comprehensive neurological care for post-stroke patients.

Last but not least in neurology, at global level we are currently working on a long-acting neurotoxin, where the effectiveness of the treatment lasts up to 9 months. Poland is one of the countries where the LANTIMA clinical trial, being implemented in 16 Polish centers, is underway.

In rare diseases, Ipsen has expertise in four main areas: rare bone, endocrine, liver-related and neuromuscular diseases. We're also engaged in discussions about introducing new, first-in-class products.

“ There are over 7,000 rare diseases in the world, but less than 1,000 have treatments. We're committed to bringing the full potential of our innovative medicines to Polish patients, and to working with stakeholders to secure broader access based on value and impact on the healthcare system. ”

EF: What are the ESG pillars of Ipsen Poland?

IP: Ipsen focuses on four pillars: Environment, Patients, People, and Governance. We have a framework we call “Generation Ipsen for Positive Change”, a global initiative that holds local significance. In terms of Environment, we

strongly emphasize aspects like renewable energy and upgrading our vehicle fleet to respect CO₂ emission targets through hybrids, if electric-only vehicles are still impractical in some regions. In terms of Governance, we hold an ISO certification for anti-corruption management systems. We prioritize business ethics and rigorous compliance. Our CEO often talks about “mindful risk-taking,” which means we maintain the highest ethical standards while taking calculated risks and implementing necessary controls.

The social aspects revolve around our people and our patients. Employee diversity is crucial to us, and we achieved gender parity in the global leadership team (our top 160 leaders) this year, a significant milestone. In Poland, more than half of the leadership team is female. We're also a ‘Great Place to Work’ in more than 20 countries. In Poland, we were certified as a ‘Great Place to Work’ for the first time in 2021. We repeated the success in 2022 and have recently got the news of re-certification once again, with a Trust Index that increased 5 points vs. last year and is now 89%! We also engage in corporate social responsibility activities, such as supporting orphanages, and almost all colleagues participate.

EF: What is your take on attracting and retaining talent, and how does it align with your view on patient centricity?

IP: Attracting talent to the pharmaceutical industry is easier than in other industries because our mission to improve patients' lives resonates with people's desire to contribute positively. Culture plays a vital role for us at Ipsen. We aim to foster a culture of collaboration and excellence, and I firmly believe in the value of cooperation and teamwork. It's at the core of what we do.

Our culture helps us attract talent, and also to motivate and retain it. The motivation challenge becomes important, especially with hybrid work arrangements. We need to ensure that our cultural values continue to inspire our teams as they navigate a blend of in-person and remote work. At Ipsen, we follow a ‘3 + 2’ policy for office-based staff: three days in the office or at events and two days remote, averaging 60% in-person and 40% remote work each month. This approach provides empowerment, flexibility and allows teams to define their rhythm and when they need to come together for collaborative efforts. Motivation, particularly in times of complexity and uncertainty, requires special attention, beyond financial incentives. It's about maintaining a strong sense of purpose and shared values in our work. Development opportunities serve as a great source of motivation as well. We offer various training programs, both in-person and online. Talent management is a priority, especially for high-potential individuals. I also dedicate personal attention to helping them progress.

Retention is another key area. A certain degree of turnover is natural, but we actively work on retaining our team members. In the competitive pharmaceutical industry, there's a demand for experienced managers, often leading to salary increases when they move. When I worked in consulting, I learned that change is effective only when done with people rather than to people. It's a lesson I've carried into my current role. We have a portfolio of initiatives, but involving our team in the process is crucial for success. I was fortunate to join a successful organization, so my approach has been more about evolution than revolution. I've had the freedom to make strategic investments and try new things, building on our strengths. I try to give the same freedom to my people. It's a refreshing experience.

EF: What will you say to the team when toasting Ipsen's 30 years in Poland?

IP: Celebrating Ipsen's 30th anniversary has been a source of immense pride. It's not only about the history but also about the legacy we carry forward. We've touched the lives of millions of Poles over these three decades. Our journey continues, and I'm hopeful for the future. Ipsen is evolving, investing a lot in research and development, especially in rare diseases. We're seeing double-digit growth in Poland, a testament to our commitment to helping more patients every year.

Remembering that our success is all about the people and about embracing change is important. Open-mindedness and a learning mindset are crucial for the next 30 years to maintain this momentum. We have a great team spirit, promoting trust, collaboration and excellence in execution. Diversity also plays a key role, as we have colleagues coming from various backgrounds and industries. Mixing it all together in the context of Ipsen Poland creates a dynamic, passionate and innovative environment.

Krzysztof Łokaj

General Manager
Poland, Chiesi



EF: 2023 has been a year of transition. Do you view it as a year of challenges or opportunities?

LK: 2023 has been a year with challenges and opportunities. As the administration is transitioning, we see that the plurality of voices within the government is increasing. In the past years, there has been an impressive improvement in reimbursement policies, which is important to ensure access to innovative therapies. *As the administration changes, it is important to showcase the value of innovation, particularly to the Ministry of Health (MOH), which is the key administrator for the pharma business concerning drug reimbursement.*

We are looking at a more cost-effective approach when it comes to the new law for reimbursements. It will have some positive impacts for pharmacies and distributors. Since November 1st, the fixed margin for the distributors increased up to 6%.

At the same time, margins for the pharmacies are also higher. Some changes in the reimbursement law still need to be further clarified. It is difficult to judge right now, and there could be some risk. Overall, I view these changes as quite neutral rather than challenging.

On the positive side, I think the pharma market will continue to grow. As the new government will be pro-European Union, I believe in the continuity of the legacy when it comes to investing in new reimbursements and novelty drugs. Being part of the EU is a positive and major factor for Poland. I think this is also an innovative approach, allowing us to adopt more novel, digital solutions within healthcare in Poland. Poland has made significant progress regarding digitalization since the pandemic, and we are leading in the digital space regarding e-prescriptions and medical tele-visits. Continuing this trajectory would be ideal, as it increases competition in our industry. I see the opportunities in the long run, and we currently have a positive outlook.

EF: How do you see the healthcare market in Poland evolving?

LK: Today, less than 6% of our GDP is allocated to healthcare. Other countries such as Germany, spend significantly more than 10% of their GDP on health. Our GDP is lower than Germany's, and our population is only half of theirs. I think there is some room for improvement to have a healthier and more productive population, and this is a task for the new administration.

“ We need to spend more money on healthcare. We need to address the aging population and low birth rates. This is the first year we have had negative results for births and deaths. These trends are like those of other Western European countries. We need to adjust the existing system to the new challenges. ”

EF: Your respiratory business is your focus. How do you see this focus evolving, and what trends do you see in the portfolio?

LK: We completed our five-year strategic plan in June 2023, and have a few launches in the respiratory area. In special care, we are looking to introduce products globally and locally. I believe the consumer health segment will develop, and we will be able to increase our market share with strategic initiatives.

Next year, we will have submissions for two products on rare diseases to the MOH. This would hopefully enable us to start to build our market share in rare diseases over the upcoming years. We are expecting new launches to treat asthma, that will improve the patient's outcome. *Additionally, the government is focusing on bringing therapeutic access to elderly patients, and most products from Chiesi are included. More patients are getting access to these medicines, and this is a very positive initiative for the pharma sector.*

EF: If you had to create a roadmap towards a sustainable healthcare model in Poland, what would your three main pillars be?

LK: Focusing on the patient is the first pillar towards a sustainable healthcare model. This will be focused on how we can help the patient with diagnosis, education, and better access to treatment from a specialized physician.

The second pillar would be Sustainability. Chiesi is conducting market research studies in Poland, where we are asking opinion leaders and administration employees for their thoughts on sustainability and why this is important. In France and the Netherlands, they are very optimistic about sustainability and believe that it is important. Italy and Spain believe sustainability is important, but it is not the main priority. Chiesi is leading in sustainable development. *Sustainability is key for our operations. Part of our sustainability process and our B-Corp certification is our education efforts around prevention. Chiesi is one of the pioneering organizations in the field to get a B Corp certification 3 years ago.* One of our innovative initiatives to approach sustainability is through product innovation. We are moving and starting to work on a different recipe for our inhalers to reduce our carbon footprint. The third pillar would be to focus on new portfolios and market access. This is key to improve patient outcomes.

EF: Chiesi Poland is going to be celebrating 20 years soon. What are you going to celebrate as an achievement?

LK: I been with Chiesi for over 10 years now. We are celebrating our 20th anniversary this year. *We are celebrating the impressive progress we have made in the past and our commitment to our patients. We went from few million in turnover to a possible 230 million in 2024. This is a significant leap.* We will also present a strategy for the upcoming years and how we are going to move forward. We will discuss our impact on the environment and the transformations that we have planned in Chiesi Group to ensure sustainability.

Mariusz Olejniczak

CEO
Poland, WPD Pharmaceuticals



EF: Could you please provide us with a quick annual review, highlighting your major goals, opportunities, and difficulties for the coming year, 2024?

MO: I began working in clinical development in 2022. I was working with a German-Austrian based organization when. Due to the importance of the Polish market for clinical trials, smaller Polish companies were largely outsourcing this portion of the pharmaceutical industry to larger ones during this time. *The number of organizations conducting clinical investigations in Poland steadily increased, as well as the number of employees in the industry.* At the moment, we have a corporation with a larger hub that employs roughly 100,000 people.

Beginning in early 2015, there was a change in the industry as companies attempted to perform manufacturing. We may be able to anticipate the first significant results from production in 2024, as developing new medications takes time. I'm hoping that significant agreements between major players and Polish biopharma will occur in 2024 and 2025. *Poland is an excellent location for conducting clinical research. Poland, in my opinion, is the 6th or 7th largest market in the world because Polish patients are more willing to try new things and are open-minded in their search for new treatments.*

EF: Why is investing in Poland a good idea?

MO: *In addition to our early advantage in clinical research, we are still less expensive when considering the whole picture, and our investors place a great deal of importance on our ability to secure non-dilutive funding. Poland is a good place to locate a good company.* The difference with other European countries lies not only in the quality of science but also in the extent to which non-dilutive funding and inexpensive study methods may help you support your model. Everything in biotech is expensive. Polish investors were mostly concentrating on service-oriented businesses before the arrival of European investment; thus, the cost factor and non-dilutive funding could propel the Polish market upward.

In this industry, having knowledge and understanding of the market is crucial; while investing money, you run the risk of losing it all if you lack the right skills or know how to conduct clinical studies, research and development. This information is previously known by those in the manufacturing sector. There is a Polish business that specializes in CMC and has extensive production experience. Although the manufacturing sector involves developing something as a sponsor or not as a contract research organization, there is undoubtedly experience from the outsourcing sector.

EF: Could you explain the oncology trends and the reason you are concentrating your efforts there?

MO:

“ WPD is not just business, but a mission, as many of our investors and employees have a personal stake in the fight against brain cancer. Along with nations like Estonia and Greece, Poland is one of the epicenters of glioblastoma in Europe. We have the highest proportion of patients per population who have both glioblastoma and pass away from the illness. ”

Both adults and children are included in this. The demands in this country are more pressing than those in other nations, particularly when considering the options available.

EF: How can we make the biotechnology industry more aware of these partnerships and emphasize their significance?

MO: In Poland, social capital is a problem for our type of business and there are clear opportunities in Poland. This is because of historical factors that go back a long way. Numerous challenges have been faced in this region of the world. *Building social capital and trust therefore becomes essential. As Polish people, we must endeavor to address this issue. It will take time to achieve, but it won't be an easy road. By working on larger-scale initiatives repeatedly, we can build trust and social capital, and eventually, our social capital will be on par with that of Western European nations.* It will take time; we will not be able to create social capital in one generation.

EF: Do you have a final message for our readers?

MO: A crucial objective that is both attainable and extremely challenging is finding a partner to conduct our drug's phase three trial. *If your study benefits patients, Poland is an excellent location for clinical research because patients are the ones who make the decisions in their lives. There is a saying in Poland that says people make decisions whether they want to or not.* The Polish patients are well educated, and they are aware of the kinds of studies that will and won't be beneficial to them.

Marcin Szumowski

Founder and CEO
Molecure



EF: What opportunities do you see next year, and what are you most excited about?

MS: The buzzword will be AI in the upcoming year, especially in Silicon Valley. Conversations there revolve around how AI can revolutionize the industry. *Recent reports by McKinsey and others show how the industry is investing in AI and how it could significantly speed up drug discovery, cut costs, and reduce attrition rates. Over the past year, we have been working on this, and we are ready to implement solutions.* Success stories exist of companies that are utilizing AI modules to support drug discovery.

At Molecure we are currently running a phase 2 proof of concept trials, aiming to demonstrate the therapeutic effectiveness of our clinical candidate OATD-01, which blocks the activity of CHIT1, a protein driving various inflammatory and fibrotic diseases. While we have seen promising results in rodents, we are still to prove the efficacy of OATD-01 in curing patients. *We are proud to be the first Polish company to receive FDA approval to start a phase 2 clinical trial in the US.*

EF: What is the role of Molecure in the market?

MS:

“ Our primary mission is to introduce the first innovative Polish drug for unmet medical needs worldwide. That is the core purpose behind our company’s creation, and it drives everything we do. ”

Regarding our role in the Polish biotech sector, we are among the pioneers shaping this sector’s growth. Ryvu was the first Polish innovative biotech company founded in 2007. Since then, over 20 companies have emerged, significantly increasing the market cap of the sector.

We are on a high-growth trajectory, but we have room for improvement. Several companies are actively engaging in global partnerships. *While neither RYVU, Molecure, nor other biotech might be directly bringing these drugs to market, we anticipate the possibility of the first Polish drugs entering the global market within the next two to five years through partnering with global pharma companies.*

EF: How are you innovating in Poland, and how can Poland become a biotech hub?

MS: We are currently running one clinical trial in Poland, and another

globally. *The price-to-quality ratio for clinical trials in Poland is impressive. Even though countries further to the east or southeast might offer more competitive prices, quality is the most important factor.* Historically, our strength was in late-stage clinical trials. Now, we are seeing more phase 1 and 2 trials emerging, integrating the entire process from early drug discovery to effective participation in late-stage clinical development. While we must go global to reach a diverse population, Poland can be a strong hub for progress.

Another factor supporting the sector is access to substantial funding. *Non-dilutive funds are crucial due to the absence of specialized funds and the industry being relatively unfamiliar to generalist investors. Growing the sector can open doors to foreign capital, but in the meantime, non-dilutive funds are critical for support of R&D.*

Poland’s success in the gaming industry is rooted in our strong education system for IT programming, boasting some of the world’s best programmers. This led to the creation of multibillion-dollar gaming companies that expanded globally. While creating a game like The Witcher differs greatly in timescale from developing drugs for patients, the life science and biotech sectors have similar potential to gaming. *We have a pool of highly skilled graduates with top-notch education, offering immense value to these industries.*

EF: What strategy do you use to attract investment and investors into Poland?

MS: *Getting our valuation back over \$200 million, where it was three years ago, is an important goal.* We need to increase our valuation to have any impact on various fund managers’ portfolios; otherwise, it will not catch their attention, even if the return is significant in relative terms. We considered reverse mergers, looking at potential transition to NASDAQ from the Warsaw Stock Exchange. Unfortunately, it is immensely complex due to different legal frameworks. This situation and our early listing on the Warsaw Stock Exchange (WSE) limit our VC and private equity funding options.

EF: If you had to advise people trying to enter the biotech sector in the Polish industry, what advice would you give, and what pillars would it be founded on?

MS: For entrepreneurs, finding a niche with unique and well-defined advantages is crucial for growth and internationalization. I have experienced this firsthand, starting a MedTech company with a PhD student, which became the third best-selling cardiac telemetry diagnostic technology in the US, worth over a billion PLN at its peak on the Warsaw Stock Exchange. *Aim high, dream big, stay focused, and be stubborn in your strategic goals as an entrepreneur. Never give up, never surrender.* Poland has shown high-return opportunities in life sciences, and investors should look for strong teams with unique technology and the drive to internationalize rapidly. The right team and unique technology are the winning formula for outside investors.

Jarosław Dastych

Founder and CEO
Proteon Pharmaceuticals



EF: What inspired you to found Proteon Pharmaceuticals, coming from an academic background?

JD: My orientation has always been more towards engineering than pure science. I find great satisfaction in transforming scientific discoveries into practical solutions, effectively bridging the crucial gap between theoretical advancements and their practical and tangible applications. The synergy between science and technology is fundamental, and I believe in harnessing this power to address critical challenges. In my perspective, technological advancement is not just an option, it is a necessity for tackling problems and driving progress. While there may be individuals who can live without technology, society as a whole must seize the future through the strategic use of technology. Proactively managing our collective future requires not only the adoption of existing technology but also the strategic leverage of cutting-edge advancements and a commitment to continuous learning. This philosophy was the driving force behind the creation of Proteon Pharmaceuticals.

“ We are dedicated to leveraging technology as a powerful tool to address global health challenges and shaping a future where technology is a driving force for positive change. ”

EF: What discoveries and technology are you bringing with Proteon into the market today?

JD: At the forefront of our endeavours is a deep exploration of naturally occurring bacteriophages, *viruses that target and infect bacteria*. Our understanding of bacteriophages has evolved extensively since they were co-discovered a century ago independently by two scientists: Frederick Twort and Félix d'Hérelle. When taking on real-world problems in product development, we encounter gaps and misconceptions rooted in a century-old concept of bacteriophage therapy, bridging the gap between a strong scientific foundation, the traditional bacteriophage therapy concepts and current scientific knowledge.

Central to our approach is the crucial characterization of bacteriophages, predominantly through advanced DNA and genomic analysis methods embedded in our technological platform. Analysing bacteriophage DNA is not a simple task, involving understanding their life cycles - whether lytic or lysogenic. *This requires the meticulous analysis of DNA or genomes, often featuring novel or unique sequences, where AI and genomics play pivotal roles in rapidly analysing and solving the meaning of bacteriophage's genome sequences effectively.*

On the flip side, our contribution extends to the creation of products utilizing naturally occurring bacteriophage features - a process laden with challenges. Combining bacteriophages forms a new entity with potential synergies or conflicts. Rationally designing bacteriophage cocktails is a crucial part of our innovation. We prioritize strict product standardization and rigorous quality control, particularly in the handling of bacteria and bacteriophages.

These pioneering efforts are underscored by the absence of established re-

gulations, making quality control a meticulous process involving navigating through time-consuming validation processes. *Uniquely positioned, we are dedicated to modernizing century-old technology, aligning it with current industry standards by developing modern analytical methods and manufacturing processes.*

EF: How do you see the potential technology being used to address antimicrobial-resistant (AMR) bacteria?

JD: Bacteriophages are a promising solution to the antimicrobial resistance (AMR) crisis, viewed not merely as a medical, but predominantly an environmental challenge, that stems from introducing chemicals into the environment leading to the late side effects. *Antibiotics inadvertently contributed to AMR by creating a shift in the evolutionary pressure on bacteria. Bacteriophages, in contrast, are more adaptable and offer a dynamic alternative to persistent antibiotics. They hold the potential to address this ongoing crisis effectively. Bacteriophages target highly antibiotic-resistant bacteria as effectively as other bacteria. It can help address the AMR crisis by preventing the spread and release of antibiotic resistance genes.*

Beyond AMR, bacteriophages offer additional advantages in both animal and human applications. Their subtle and precise approach becomes especially valuable in areas where wide-spectrum antibiotics might be counterproductive by damaging the microbiome. The concept transcends merely substituting antibiotics with bacteriophages - it involves exploring their broader potential. Bacteriophages could complement antibiotic treatments to tackle AMR or reduce the release of antibiotic-resistant bacteria in specific settings. Additionally, they can be applied as nutraceuticals, protecting the microbiome in various applications. *While the urgency of AMR drives the necessity for these applications, there are further benefits to be explored in advancing bacteriophage technology.*

EF: Where do you see the industry going with bacteriophage in the next five to ten years?

JD: Bacteriophages, given their complexity, play a crucial role in the microbiome, much like the importance of big data in scientific research. The challenge lies in comprehending the vast amount of data generated from microbiome analysis. This complexity represents an exciting new frontier for both the scientific community and industry. While handling such extensive data remains a significant challenge, the ongoing development of tools holds the promise to profoundly transform our approach.

This marks a revolutionary moment where tools are being developed to navigate the complexity of microbiome structures and information. The application of self-learning algorithms and AI is going to play a critical role in developing bacteriophage-based solutions. That is not limited to treating wounds or infectious diseases. *Bacteriophage solutions have the potential to bridge the gap between nutraceuticals and medical applications, with a focus on gut health and overall well-being. Moreover, bacteriophage technology is showing promise in the exploration of non-infectious diseases, where the roles of non-eukaryotic organisms are yet to be fully understood.*

I am optimistic that Proteon Pharmaceutical will play a vital role in this evolving biotechnological landscape. Our challenges include the need for validation and overcoming past setbacks. Introducing bacteriophage solutions to the global market is a substantial step forward, but advancing it further requires significant resources and intellectual capacity.

Lukasz Izbicki

PharmD, PhD,
 Founder and CEO
ClinicalTrials.EU, CTIN, Leki.pl



EF: Could you elaborate on the projects you are working on and why they are important nowadays?

LI: I am working on two exciting projects – patient-centric platforms for pharmaceutical information. We leverage our combined knowledge, background, and experience from previous companies to build scalable platforms across Poland and the European Union.

One platform, Leki.pl, is a digital pharmaceutical care platform specifically designed for the Polish market. *Each European market has regulations and needs, so that a one-size-fits-all approach wouldn't work. Leki.pl provides reliable and up-to-date information on medications tailored to the Polish context. This prepares patients to become key decision-makers in their treatment journeys, especially with upcoming changes in prescription regulations.* I believe doctors in Poland will soon be required to use generic names (INN) instead of brand names. This shift empowers patients to make informed choices about the medications they use, both prescription and over-the-counter. Leki.pl equips them with the knowledge they need to participate actively in their healthcare alongside their doctors and pharmacists.

On the other hand, clinical trials represent a pan-European opportunity. *The European market is more harmonized due to strong regulations, making it possible to build a cross-border platform. ClinicalTrials.EU leverages the CTIN network, a promising pan-European project that streamlines clinical trial information.* This platform tackles the major challenge of patient recruitment in Europe. By offering patients easy access to information on ongoing trials, ClinicalTrials.EU empowers them to explore potential new therapies and contribute to medical advancements.

Both Leki.pl and ClinicalTrials.EU share a central mission: empowering patients. We believe that patients deserve access to clear, reliable, and up-to-date information. By providing user-friendly platforms, we encourage patient engagement in their own healthcare and research participation.

EF: What opportunities do you see in 2024 for Poland and Europe?

LI: The noticeable trend of patients increasingly obtaining health information online creates several interesting opportunities for platforms like ours. The growing awareness and demand for reliable medical knowledge translates into an increasing interest in our solutions. I see this as a great opportunity for Leki.pl. Patients will become decision-makers, and it will be up to them to make conscious choices about their medications.

EF: How do you see the role of AI evolving in the industry, and what other uses can it have?

LI: The impact of AI on our business has been revolutionary. ChatGPT-like tools have amplified our capabilities, making projects like ClinicalTrials.EU a reality. While human oversight remains crucial - pharmacists on our team and double-checking by sponsors/CROs - AI is a game-changer for information publishing and matching patients with clinical trials. Many patients, especially those above 60, are already comfortable using the Internet for health information. Search engines and internet tools have become ingrained in their self-management routines.

Soon, patient behaviour might not change dramatically. They will rely on search engines, and AI will likely play a background role in ensuring relevant information reaches them through search results. As information publishers, we will likely see an increase in AI-generated content alongside a surge in patient-generated data.

EF: What do you want to achieve when celebrating the 5-year milestone?

LI: Our vision for the 5-year mark is ambitious but attainable: to be the dominant platform for clinical trial information in Europe. We believe projects like ours have the potential for rapid growth, especially considering the rising patient interest in clinical trials.

To achieve this, we'll focus on two key metrics: patient reach and industry adoption. We aim to become the primary destination for European patients seeking information about clinical trials. This translates to reaching a substantial user base, with millions of patients actively utilizing our platform.

On the industry side, we want to be the go-to partner for sponsors, CROs, and other stakeholders. This will be reflected in many active clinical trials listed on the platform, demonstrating industry confidence in our services.

Ultimately, our success will be measured by the impact we create. By connecting patients with relevant trials and facilitating efficient recruitment, we can significantly accelerate medical research in Europe. This, in turn, benefits patients by bringing new treatment options to market faster. We believe ClinicalTrials.EU can play a pivotal role in shaping the future of healthcare research and patient access to innovative therapies.

By strategically placing functions where skilled individuals reside, Teva not only optimizes their talent acquisition efforts but also fosters a conducive environment for employee growth and development. *"It's a mutually beneficial arrangement - talented individuals find a workplace that suits them, and Teva gains the expertise necessary for growth."* Meiksans goes on to say that this approach has already yielded success in their CEE team, having employed leads for departments such as innovative medicine or ESG using this methodology.



Chapter 4

MedTech

“We strongly believe that connected outpatient care will be the future. Whenever possible, let us keep patients at home and diagnose them at home. Patients will be happier, and it will be cheaper.”

Beata Karasińska, General Manager Central Eastern Europe and Israel, Baxter.

MedTech in Poland is a flourishing field, marked by rapid innovation and substantial growth. Boasting advances in diagnostic technology, telehealth solutions, and cutting-edge research facilities, alongside advanced manufacturing capabilities and strong governmental support, Poland has emerged as a pivotal hub for medical technology in the region.

Introduction



Poland's MedTech industry is a rapidly growing market, holding the position of the largest medical device market in Central Eastern Europe. The market size is expected to reach 13.8 billion in 2024, according to the Polish Investment & Trade Agency. This trend shows no signs of slowing, as Arkadiusz Gradkowski, CEO at the Polish Chamber of Commerce of Medical Devices (POLMED) and Board member of MedTech Europe, explains: "Given the rapid aging of our part of Europe, the market is bound to expand significantly, currently at a rate of 5 to 10% per year." Therefore, he believes "While the pharmaceutical sector is substantial, we aim to alter the government's mindset, acknowledging the importance of investing in devices for the nation's progress."

Gradkowski goes on to outline Poland's role in the European MedTech environment as that of a distributor-turning-manufacturer: "We import more medical devices than we manufacture while countries like Germany, France, Switzerland, and Spain are on the manufacturing side. However, it should be noticed that the Polish MD manufacturing sector has grown in recent years. There are substantially more medical technologies and devices manufactured in Poland and our manufacturers have been constantly developing new products and improving those already introduced to the market."

Protecting a business-friendly environment on which both patients and professionals rely whilst communicating the value of medical technology to payers, policymakers, and society is essential in ensuring the further growth of the sector and Poland's position among the top countries from which to import manufactured goods. The MedTech sector in Poland is marked by innovation, research, and a strong focus on healthcare technology. Companies actively contribute to the development of medical devices, diagnostics, and other technologies aimed at improving patient outcomes.



Companies like **Baxter**, have a long-standing commitment to these goals, having established in Poland in 1992 with a clear mission they still share today. **Beata Karasinska** (GM) explains that "In the beginning, Baxter was a company that delivered simple solutions for patients but we transformed from a traditional pharma company to a MedTech company; from a handful of employees in Poland to more than 500 employees; from a company that only had a commercial team to one that currently

has an organizational structure that supports patients in Poland and provides a shared service for the entire EMEA region." Baxter's shared services hub, employing more than 350 people, handles areas such as IT, finance, and procurement, allowing them to remain in close contact with every aspect of their operations that their devices touch, including inside of the operating theater itself.

They are not alone in their efforts to strengthen the offerings of Polish MedTech, as exciting new developments have come to light regarding FUJIFILM's entrance into the European healthcare ecosystem. **Paweł Augustyn**, MD, President, Central & Eastern Europe at FUJIFILM explains, "This is the first year that FUJIFILM Healthcare Europe has been established. We strive to establish a business division that is exclusively dedicated to healthcare. After the HITACHI Medical Systems acquisition, my main goal is to logically combine these two companies and portfolios into one for the benefit of the Polish healthcare system as well."



As a medical doctor, **Augustyn** understands the needs of frontline medical personnel at an intimate level and believes that combining FUJIFILM's state of the art imaging and diagnostic hardware with new AI tools will empower doctors and lead to quicker, more efficient diagnoses. FUJIFILM agrees – and they have also established a shared services hub in the city of Gdańsk.

Cost obviously plays a large role in the decision of where to expand a company's footprint, and when Poland is considered as a new base of operations, companies can expect excellent value for their money.



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Factors such as accessible real estate price, excellent public transportation and infrastructure, and low energy costs allow companies to keep operating costs at a reasonable level while offering a higher quality of life for a company's workforce when compared to other locations. The country offers investors a variety of cities to choose from, spread out across the entire country, each of which provides the security that workers need and the infrastructure that will keep talent happy in the country. This combination of factors is not easy to find, and it is for this reason that investors are attracted to Poland over other CEE countries. While costs may be higher than countries in Asia, in return for their investment, investors can expect a higher return of quality, and a more experienced talent pool better suited to more advanced roles.

Pawel Augustyn, MD, FUJIFILM's CEE President, shared that they operate an SSC in the seaside city of Gdańsk, Poland, which is well-known for both for the beauty of its architecture and being the business hub in the north of the country. **Pawel** cites certain factors as to FUJIFILM's decision to locate there: *"The Polish economy is expanding at a faster rate than the average European economy. As a strategic European country, Poland has been having substantial growth drawing in various*

multinational corporations to offer shared services. Poland will almost certainly experience this kind of growth when I observe that many executives are coming to the country to discover the foundation for success."

Wrocław, one of Poland's business capitals located in the country's Southwest and near Germany and Czechia, is home to Merck's shared services center, one of only three SSCs that Merck operates around the globe. *"In total Merck employs close to 1000 employees in the country, a number which has and continues to grow consistently. This is because Poland offers exceptional access to talent, language proficiency, and a highly qualified technical workforce,"* says **Phil Krzyzek**, Merck Poland's Managing Director and GM of Healthcare in Poland. Merck continues to leverage the excellent workforce available in Poland and put it to good use, providing patient access to medications and conducting clinical research trials, which currently involve more than 750 patients across 100 clinical research sites in the country. "There is a genuine and consistent commitment to drive the business, but also to develop employees and provide a great place to work where people can be themselves and feel great satisfaction in their work."



Large, aging population – **38 m**



Largest CEE medical device market – **USD 11bn**, forecast to reach **USD 13.8bn** in 2024



Growing private healthcare sector: **7% CAGR** in 2016-2021, valued **EUR 8bn** in 2017



Highest health expenditure in CEE – **USD 38.2bn**

Source: Polish Investment and Trade Agency; GUS; OECD data, Q3 2020; PMR; MedTech Europe Report 2020; Fitch Solutions MedTech Industry Report; Medical Devices Market in Poland, report by PARP and Ministry of Development .



European medical equipment manufacturer



www.antar.net antar@antar.net



Trends in Diagnostics: cornerstone for sustainable systems

Diagnostics is undergoing a profound change in 2024, driven by technological advancements and an increased need for effective, timely care. Executives shed light on the evolution of diagnostics, emphasizing the increasing importance of digitalization, automation, and artificial intelligence. These advancements are not mere tools for precise diagnoses but represent a paradigm shift in preventive healthcare.



Roche Diagnostics' **Dirk-Jan Paans** outlines several opportunities knocking at the diagnostics door. He states, *"Digitalization, automation, and artificial intelligence are becoming increasingly important in diagnostics. The role of diagnostics has evolved significantly over the years, driven by technological advancements."*

Poland, a country boasting top-tier graduates and innovative technologies, sets a promising trajectory for preventive healthcare. The collective endeavors of diagnostic companies, exemplified by their commitment to comprehensive solutions throughout the



patient's journey, from diagnostics to treatment and monitoring, underscore the pivotal role of technology in shaping a healthier tomorrow. In the domain of diagnostics, executives like **Beata** from Baxter underscore the pivotal role of technology in preventive healthcare. "An excellent

example of an innovation that is a shift towards prevention via early diagnosis is the ICNET software. It is a solution whose primary task and goal is to support the management of a health care facility, but also units supervising the entire area of infections and infection prevention. At the level of an individual hospital, a group of hospitals, or other supervisory units. It is software whose main feature is interoperability. It can be integrated with various IT systems in the hospital, regardless of the provider of such software. It can network geographically within a province, region, or even country. *The software integrates data that comes from various types of system modules, such as a hospital pharmacy, laboratory, and data from medical devices, which are used to assess basic vital signs when a patient is admitted to the hospital, which can be a way to faster diagnostics, such as sepsis.*"



For **Pawel Augustyn**, President of FUJIFILM CEE, motivations lie not only in the success of FUJIFILM but in the future of his country. Citing an issue endemic to many nations, a low birth rate, he says, *"We must take action to lengthen or improve society's lifespan."* Regarding reproductive health, he outlines FUJIFILM's efforts alongside those of the Polish government like the recently approved in-vitro fertilization (IVF) reimbursement program with which, *"More couples could have children as a result. FUJIFILM is a strong partner to all these clinics, also offering AI to help embryologists identify embryos with the highest potential success rate."*

Artificial Intelligence

AI has emerged as a transformative force in the MedTech sector, revolutionizing the way healthcare is delivered and advancing patient care. With its ability to analyze vast amounts of data and identify

complex patterns, AI holds immense promise in enhancing diagnostic accuracy, personalized medicine and treatment plans, data management, remote patient monitoring, predictive analytics, and even robotic surgery.

In the field of diagnostic imaging, AI-powered algorithms can analyze medical images with unprecedented precision, aiding in early disease detection and treatment planning, thereby improving patient outcomes. **Dirk-Jan Paans**, General Manager Poland at Roche Diagnostics, explains how they are leveraging this technology. *"Digitalization, automation, and artificial intelligence are becoming increasingly important in diagnostics. New technologies allow for increased efficiency as well as greater depth of analysis by combining more data points."* Through this, we improve our understanding of the patient's profile, the most effective course of treatment, and the likelihood of future complications. This enables patients to receive timely treatment, targeted to their disease, which increases the likelihood of positive health outcomes."

Recognizing Poland's wealth of medical data, companies like Roche, Phillips, and FUJIFILM are capitalizing on this data and transforming the industry by coupling data, AI, and connected services along with the medical devices they have spent years perfecting.



Phillips Poland's CEO **Michal Grzybowski** tells the story of a company that has evolved over more than a century from a humble start as a lightbulb and home appliance manufacturer to a healthcare and MedTech leader. *"By collecting data from patient monitors, imaging devices, and electronic medical records and coupling them with AI, we strive to transform clinical data into actionable patient insights. Collaborating with other pharma and medical technology providers, we actively participate in health innovation hubs to integrate technologies to benefit patients. Clinical trials in Poland can leverage our technologies, such as a fleet of cardio monitors enabling real-time data capture, fostering a non-traditional approach to 24/7 on-the-spot clinical studies."* Celebrating year one of FUJIFILM Healthcare Europe, the company betting on a future where their top-notch technology is strengthened by AI: "We firmly feel that diagnostics play a critical role in the entire process, from detection to treatment and even prevention in between. Increasing the scope of our diagnostic imaging offering is our main approach. We use highly advanced technologies, and after acquiring HITACHI Medical Systems, we are among the top Diagnostic Imaging companies in the world. *The key is also the widespread use of Artificial Intelligence, which is greatly raising the possibility and chance of early cancer detection,*" says President of FUJIFILM CEE, **Pawel Augustyn, MD.**

Data Science

“Data analytics and technologies can support in better allocating financial and human healthcare resources. Our goal is to maximize patient outcomes by allocating the resources we have most prudently.” - Dirk-Jan Paans - General Manager, Roche Diagnostics Poland

Artificial Intelligence holds immense potential to further advance the MedTech industry in Poland. Several ways AI can contribute include enhancing diagnostic accuracy, personalizing medicine through genetic analysis, improving data management and integration, facilitating remote patient monitoring, accelerating drug discovery and development, providing predictive analytics for disease prevention, assisting in robotic surgery, utilizing natural language processing for better communication, and developing rehabilitation and assistive technologies.

As Phillips Poland CEO **Michał Grzybowski** puts it, *“The future is now. I’m afraid I have to disagree when people speak of the future of healthcare being AI, IT solutions, or data management of patients; the future is already here. AI has existed for quite some time, embedded in multiple systems and clinical decision-support tools for professionals. Data management is a reality; companies are looking into it daily. The healthcare transformation is happening now; we work consistently on improving things daily; small, continuous changes are happening while we improve and collaborate with hospitals.”*

Once thought of as a far-off concept reserved for science fiction, AI tools are already being developed to remedy some of the simplest yet costly problems hospitals face. *“We are considering utilizing artificial intelligence more frequently, emphasizing augmented intelligence. We are looking at chatbots in Poland to assist us with scheduling and rescheduling meetings. Under the guidance of the Polish Hospital Federation, we will be hosting a national campaign to highlight the use of AI,”* as CEO and President of the Polish Hospital Federation, **Professor Jarosław J Federowski**, explains.



“Last year, 17 million appointments were made by patients who did not subsequently show up. Poland has the chance to highlight the significance of the problem and what we can all do to make it easier for patients to cancel appointments if they cannot attend. Chatbots are the tools that we are already developing to solve this issue.”

Federowski goes on to say that in addition to scheduling functions, AI chatbots have the ability to gather medical information from patients, such as their medical histories. *“The Federation is working on several projects to support entrepreneurs in artificial intelligence.”*

Rafał Szmuc – Co-Founder & COO, CliniNote, details how his startup aims to solve problems exactly like the ones Federowski describes, by offering solutions that affect the entire industry, from pharma to hospitals. *“Imagine top-notch European medical professionals facing the same daily struggle, being told to wait months for data. As the CliniNote co-founders we decided it was time for a change.”*



Szmuc explains that while vast quantities of data exist, there are different qualities that make data more or less usable by medical professionals or AI assistance tools. *“We uncovered that about 90% of healthcare data is dark data—unstructured and challenging to analyze. This meant that traditional AI, trained on only 10% of available data, was limited. We shifted our focus to structure this dark data, developing AI and natural language processing (NLP) tools to aid doctors in reading patient histories, exchanging information, and*

being language, geography, and system agnostic. Our journey began with a simple need and evolved into concrete functionalities, like language and geography agnosticism. Now, in late 2023, CliniNote is more than just a data capture tool. We’re moving closer to assisting doctors in providing expert information. Looking ahead, we anticipate significant changes in the next one or two years, with new functionalities and improvements on the horizon.”

Support and Education

To fully realize the potential of AI in MedTech, collaboration between technology developers, healthcare professionals, and regulatory bodies in Poland is crucial. Moreover, ensuring the ethical and responsible use of AI in healthcare will be paramount to building trust among patients and healthcare providers. The government’s support and a favorable regulatory environment are crucial factors fostering the success of the MedTech industry in Poland.

“We are pleased that the government is funding breast cancer screening. They are also subsidizing and providing free screening for lower gastrointestinal endoscopies after reaching a certain age level. We are a very active company providing cutting-edge equipment for the country and society.” - Paweł Augustyn, MD - President, Central & Eastern Europe, FUJIFILM.

Commercializing products may put them in the hands of the end-user but teaching the customer the ins and outs of a specific device, especially in healthcare, is crucial for safety and optimal product use.

Realizing this, large multinational device companies are capitalizing on educational efforts, as Baxter’s **Beata Karasińska** explains, to educate front-line workers in order to save lives and make the best use of the heavy investments the company makes into medical devices. *“We have advanced surgery products, and our teams frequently work with doctors in operating theaters. We support other doctors by broadcasting from one operating theater to many others. We observe the best and most experienced people to learn the best operating techniques. It is not about the promotion of our products; it is about the education of surgeons. We can reach hundreds of doctors, and they can question opinion leaders on the best techniques. They can see what the surgeon is doing and whether there are any mistakes.”*

For owners of small and medium-sized businesses, like **Andrzej Tarnkowski**, CEO of Antar Orthopedics, increased government support is a huge step forward.



“The regulatory framework has been modernized to match today’s market. Before, it covered products that were already obsolete, whereas now it covers modern and new products, a trend that currently exists in all industries where modernization is key. We have made huge steps forward compared with other European countries.”

Antar Orthopedics practices this philosophy in the same way as some of the biggest multinationals, pushing educational and instructional initiatives aimed at preparing clients, doctors, and physical therapists for the appropriate use of their products.

“We inform and educate the people who help patients find the right product and how to install it. In Poland, we educate medical staff in medical stores because they have to choose the best product for the patient and teach them how to use it. In Czech Republic and Slovakia, because the market is different, we work on educating the physicians as they decide which product to use, so they must know what to recommend and show the patient how they should use the product. We adapt what and who we teach in each country to have the best reach for our products.”

Dirk Jan Paans

General Manager Poland and Head of Management Center Eastern Europe
Roche Diagnostics



EF: What are the key factors to build and support a sustainable healthcare model?

DJP: By using data, analytics and technology across R&D and the care continuum, we are drawing closer to our goal of advancing healthcare and improving lives at a lower cost to people and to society. In order to bring the promise of personalized healthcare to life, Roche is focusing on key aspects:

- *Firstly, understanding the importance of early and accurate diagnosis. This enables patients to receive timely treatment, targeted to their disease, which increases the likelihood of positive health outcomes.* A focus on prevention and early diagnosis can prevent diseases from progressing to a stage where required treatments are more intense and less effective.
- *Secondly, ensuring access to healthcare, including diagnostics, treatments, and monitoring.* Improving patient outcomes requires timely and appropriate access to healthcare in every step of the patient's journey. We must acknowledge that, given the aging and expanding population and the ever-accelerating level of innovation, a larger portion of our GDP will need to be spent on healthcare. We have to change our mindset, that healthcare is not just a cost but an investment in a healthy and productive society.
- *Thirdly, setting up a system that makes the best and most efficient use of the available healthcare resources.* Data analytics and technologies can support in better allocating financial and human healthcare resources. Our goal is to maximize patient outcomes by allocating the resources we have most prudently.

EF: Looks like the role of early diagnostics is becoming more important. How do you assess the level of prevention awareness, and what initiatives can be implemented to increase it?

DJP: The focus on prevention is growing but there is still much room for improvement. For diseases like heart failure, there is a direct link between late diagnosis and more hospitalizations. The numbers regarding heart failure – diagnosis and hospitalization in Poland – are disturbing.

Another challenge remains the diagnosis of the human papilloma virus. About 50% of the population is a carrier of the virus and over 80% of the population will be infected with HPV in their lifetime. In most cases, the body is able to eliminate the virus itself after infection. However, if the body is weakened, for example by fighting other infectious diseases such as HIV, the virus can invade and turn healthy cells into cancer cells. Cervical cancer is the 4th most prevalent cancer among women.

Nowadays, it should not be acceptable for cervical cancer to be the cause of death for any woman worldwide. Cervical cancer can be prevented by screening for HPV DNA detection and vaccination programs and is highly curable if treated early. In Poland, screening rates still need improvement, and we are waiting for the introduction of a new cervical cancer screening program. *Patient advocacy organizations and primary care physicians play a significant role in awareness initiatives.*

These educational efforts are important as screening programs are only effective in combination with a mindset change from “looking for help when issues occur” to “regularly checking to ensure good health or early intervention”.

EF: You will be celebrating 20 years with Roche in two years. What would you like to celebrate most, and could you elaborate on Roche's footprint and what drives the company's growth?

DJP: I have been with Roche for over 18 years of which the last three years in Poland. Roche Diagnostics Poland started some 20 years ago with 4 people. Today, we have over 250 people in Poland. We are well established and connected with customers in the labs and hospitals but also with other stakeholders that aim to develop a high-quality and sustainable healthcare system.

I'm proud to be part of Roche. I sincerely believe in our purpose, and this has kept me here for over 18 years. Roche's tagline, "Doing now what patients need next," is a purpose we live every day.

“ We all know people who are going through illnesses and are being challenged to get the right healthcare support at the right time to end up with the best possible health outcomes. People are counting on us, every day. I cannot think of a greater inspiration to come to work every morning. ”

We have lots to be proud of but there is also still a lot of unmet need remaining that we aim to find solutions for in the years to come.

EF: What final message would you like to send?

DJP: European health systems are under strain from an aging population, non-communicable diseases such as cardiovascular disease, cancer, and diabetes, rising antimicrobial resistance, and the threat of another system-straining pandemic. This comes with pressure on budgets and staffing challenges. To address these challenges, while further improving health and well-being overall, health systems must become more patient-centric, digitally advanced, resilient, and sustainable. Medical and diagnostic technologies enable this transformation, provided they reach patients and healthcare systems.

As healthcare and the healthcare system are changing, we are adapting our organization accordingly. In our efforts to be more customer- and patient centric and to act faster, we have changed our ways of working here in Poland over the recent years. Looking at our local organization, we have created a set up that drives more cross-functional collaboration and a focus on customer-experience and -outcomes. This has come with a stronger empowerment of teams and less hierarchy to allow for faster decision-making and action. We are confident that this will make us an even better partner to customers and healthcare system stakeholders in the future as we aim to continuously elevate company- and healthcare standards.

Pawel Agustyn

MD, President, Central & Eastern Europe
FUJIFILM



EF: Is 2024 an opportunity or a challenge for you?

PA: I see 2024 having both challenges and opportunities. *Poland's GDP is growing continuously. Recall that throughout the 2008 Lehman Brothers crisis, Poland was the only country in Europe to have a positive economy with a growth rate of above 1%, which is why the European Union named Poland "Green Island" that time. Poland's overall model of economic growth is, in some way, quite robust against a wide range of challenges and adverse trends. This is a crucial issue since, as is evident, today's world is completely unpredictable.*

Openness to Europe is a feature of the new government. Due to persisting conflict between Poland and EU, Poland was the only nation left out of this post-COVID-19 recovery plan, with a total value of almost €25 billion (in grants, beside €33,5 billion in special loans). We presently will be having a pro-European government, and the release of the funds is one of the future prime minister's objectives, to be elected and sworn in by the president shortly. This will impact not only healthcare, but the entire economy.

EF: FUJIFILM Healthcare Europe company was recently announced in Europe. How does this affect your operations in Poland?

PA: As the healthcare business in FUJIFILM was growing, the executives in Japan realized that there was a need to increase focus on healthcare. Thus, the need for strong leadership that prioritizes healthcare became increasingly apparent. Mr. Goto is currently the global CEO of FUJIFILM, and he comes from the healthcare business. Since he became CEO, he has been working to improve the organization to better cover the healthcare needs in the market.

We firmly feel that diagnostics play a critical role in the entire process, from detection to treatment and even prevention in between. Increasing the scope of our diagnostic imaging offering is our main approach. *We use highly advanced technologies and after acquiring HITACHI Medical Systems we are among the top Diagnostic Imaging companies in the world. The key is also the widespread use of Artificial Intelligence (AI), which is greatly raising the possibility and chance of early cancer detection.*

The new FUJIFILM Healthcare division will allow more resources for R&D funded by turnover and to have more control and autonomy over strategic decisions made within the business. This is the first year that FUJIFILM Healthcare Europe has been established. We strive to establish a business division that is exclusively dedicated to healthcare. After HITACHI Medical Systems acquisition, my main goal is to logically combine these two companies and portfolios into one for the benefit of the Polish healthcare system as well.

EF: Could you elaborate on how you keep your employees engaged, and how do you attract talent?

PA: We completed an engagement survey later in 2023, and I was pleased with the results. We gathered our employees' feedback as to how the company's vision resonates to them and whether this creates a good base for their engagement. I am proud of the results, as we ranked very well not only against FUJIFILM average, but also against our competitors' benchmark in the market.

Twice a year, I host kickoffs for the entire organization. We honor those who have worked for the company for the most years, and I have had many people celebrate their 25th anniversary at work which tells a lot. *As a leader, it is fulfilling to see members of the same family of different generations working in FUJIFILM.*

EF: How are you keeping the doctors up to date on the newest advancements in technology through education?

PA: My area of expertise is gynecology, and I have previous ultrasound experience. However, I gained knowledge of ultrasound by using it in my work as a hospital doctor. At present, our son is enrolled in the first year of the Medical University of Warsaw, and I find myself drawing comparisons between his academic experiences and my own university education. There's a big distinction. Biophysics was one of the preclinical modules covered in the first two years of medical school. For me, there was nothing more to it than studying from books. However, I was taken aback when our son showed us his own photo and revealed that he had already begun to experiment with a portable ultrasound device during classes. *As you can see, a young doctor candidate has been exposed to cutting-edge technology from the start. This enables these young doctors to finish as soon as possible, everything has been accelerated. All of FUJIFILM's machines now have settings based on very advanced digital technology.* Because diagnostic imaging is so fascinating, I am pushing our son to think about pursuing it in the future.

EF: After such a successful career, what will you be most excited to celebrate when you reach your soon-to-be 15th anniversary?

PA:

“ Let me start by saying that I am still the ‘company doctor’ too. When I first started 12 years ago the company wasn't doing financially well in the CEE region, including Poland. I am proud that we are now one the most profitable regions for FUJIFILM Europe. From a business standpoint, this is undoubtedly my greatest accomplishment; in fact, our current tagline is ‘Never stop’. As you might expect, we continue to improve with every year. ”

This has translated to better well-being for the employees who work at FUJIFILM Poland. They can now take advantage of excellent external development. For my part, I'm proud of what we are doing for society, particularly concerning endoscopy and mammography, as we are at the forefront of early cancer detection. That's what fills me with immense pride.

Michał Grzybowski

CEO, Poland
Philips



EF: Could you share the current priorities on your agenda for Poland in 2024? Do you see it as a challenge or an opportunity?

MG: Poland faces challenges similar to the global healthcare landscape. At Philips, we adhere to the quadruple aim in the health industry, addressing an aging society, workforce shortages, budgetary stress, and increasing patient involvement. In Poland, with over 155 thousand doctors and twice as many nurses, 55% of personnel is over fifty years old, indicating an aging workforce and society. Our focus is on technology. Our annual “Future Health Index” report, spanning 15 countries, reveals that 64% of healthcare leaders in Poland plan to use digital technology to mitigate staff shortages, compared to 56% in the Netherlands.

We recognize Poland’s vast data repository and aim to facilitate easy access. By collecting data from patient monitors, imaging devices, and electronic medical records and coupling them with AI, we strive to transform clinical data into actionable patient insights. Collaborating with other pharma and medical technology providers, we actively participate in health innovation hubs to integrate technologies to benefit patients. Clinical trials in Poland can leverage our technologies, such as a fleet of cardio monitors enabling real-time data capture, fostering a non-traditional approach to 24/7 on-the-spot clinical studies.

EF: Could you elaborate on Philips’ footprint in Poland, and what is the importance of Poland to the group?

MG: *With a 130-year legacy, Philips has evolved from light bulbs and home appliances to healthcare leadership. Our focus is on imaging technologies, encompassing MRI, ultrasound, CTs, cardio monitors, image-guided therapy, respiratory machines, CPAPs, oxygen concentrators, IT solutions, and personal health products. This transformation aligns with our mission to touch and improve 2.5 billion lives annually by 2030.*

Recognizing the environmental impact of healthcare, we are committed to sustainable solutions. Globally, healthcare contributes 4.4% of CO₂ emissions, ranking as the fifth-largest pollutant. We aim to provide eco-friendly healthcare solutions, promoting green hospitals. In Poland, our MR installations with blue seal technology, eco passports for devices, and optimized product designs support sustainability. Collaborating with the green coalition for healthcare and UNGC (United Nations Global Compact - Network Poland), we drive sustainability initiatives. The Green Hospitals Report, co-authored with UNGC, highlights good practices in health facilities and has international relevance.

EF: If you had to create a roadmap to a prosperous and sustainable healthcare system in Poland, which would be your three key pillars?

MG: Emphasizing sustainability in healthcare solutions is crucial. Unfortunately, current procurement practices in public healthcare systems prioritize cost over green criteria. Poland should follow examples like the Czech Republic, where public tenders integrate environmental considerations. Legislative measures are essential to drive change in public healthcare. Philips aligns with this vision, incorporating eco-design and circular approaches.

We urge partners to uphold higher sustainability standards throughout the value chain. Our third pillar focuses on the healthcare IT revolution. *While hospitals are digitally advanced, achieving system interoperability is key. Achieving system interoperability ensures seamless communication and accessibility, enabling proactive measures and potentially reducing unnecessary hospitalizations. Telemonitoring empowers patients to connect with their doctors from home, marking a positive shift in healthcare delivery.*

EF: Could you elaborate on what drives the business forward in Poland and what the customers are most interested in?

MG: *University hospitals are always interested in having state-of-the-art and advanced solutions and usually have the highest budgets. The systems they acquired are the best and were the first to have the blue seal technology (helium-free). They are also the most prestigious institutions. When it comes to private customers, they look more at a value-for-money situation. They look for system features they can use or need to be available, such as diagnostic imaging. We increasingly discuss financial solutions with our partners or customers around constructing a service contract, refurbishing systems, or sustainable solutions. It is common to have arrangements whereby we take back an old system and install a new one; the old one will be used for recycling.*

EF: How do you assess prevention awareness in the country?

MG: *While Poland has extensive screening programs, low implementation, and patient reporting persist. Factors include limited awareness of certain conditions, reluctance to undergo tests, and psychological fears. We’re launching an educational program with the Philips Foundation this year to address this. Collaborating with Poland’s largest pediatric hospital, details are pending finalization. Previous projects with Foundation Rak’n’Roll focused on increasing ultrasound examinations for pregnant women and supporting gynecologists’ ultrasound practice. Additionally, partnerships with UNGC and participation in the Green Coalition for Healthcare underscore our commitment to broader health initiatives.*

EF: You will be celebrating your first anniversary in your new position; what will you be most excited to celebrate?

MG: Taking a step back to consider the achievements isn’t easy when involved and busy with projects and plans. As the board president, I will be very proud of our employee rates at the end of the year, as they are happy to work for us and have a passion for what they do. The biggest achievement is having a team willing to work and stay with the company. It is not the easiest job in the world, but it is very rewarding; they appreciate working with healthcare leaders, hospitals, healthcare professionals, and patients.

“ I’m afraid I have to disagree when people speak of the future of healthcare being AI, IT solutions, or data management of patients; the future is already here. ”

Beata Karasińska

General Manager Central Eastern Europe and Israel
Baxter



EF: What mission did you set for yourself when you took over as general manager of Central Eastern Europe and Israel?

BK: When I assumed my role was to consolidate three independent teams on the ground. My most important goal was gathering people and building a unified team. Once I unified these teams, I aimed to magnify our presence across the cluster. *Our mission is to equalize access to Baxter products and business wherever possible. This will give patients, healthcare professionals, and our employees a chance to develop.*

EF: Could you elaborate on Baxter's commitment to the Polish healthcare system?

BK: Baxter Poland was established 31 years ago, in 1992. In the beginning, Baxter was a company that delivered simple solutions for patients. *Baxter transformed from a traditional pharma company to a MedTech company. It went from a handful of employees in Poland to more than 500 employees. It went from a company that only had a commercial team to one that currently has an organizational structure that supports patients in Poland and provides a shared service for the entire EMEA region.* Most of these changes happened in 2021.

Our shared services operation in Poland was set up in 2021, and it currently employs more than 350 people across the finance, procurement, HR, and IT departments. In 2021, Baxter also acquired Hillrom. The Hillrom portfolio is our strategic focus, and we are investing in it to address access issues for HCPs & patients in Poland. Healthcare professionals and patients will benefit from a wider range of solutions. We shift the conversation from drugs to solutions that aid early diagnosis and treatment.

The Hillrom portfolio contains products such as vital sign monitors that measure blood pressure and other vital signs of a patient. These monitors can be connected to the mobile devices of healthcare professionals. The data from those monitors can be easily transmitted to the hospital's IT systems and combined with data from other hospitals, pharmacies, and laboratories to help healthcare professionals make early diagnoses.

We also have full hospital equipment, including an entire range of operating theater equipment. The IT systems are connected to all these pieces and give healthcare professionals a view of the patient's progress. *Compared to the simple solutions we offered when we started, we have come a long way through innovation. Developing Hillrom's portfolio is one of our long-term projects, and these are capital investments. Poland is currently waiting for funds from the European Union to build, rebuild, or modernize the hospitals. Baxter is ready and willing to help.*

“ Poland is a country blessed with amazing talent, and this is why we decided to build the shared services hub here in Poland. Our team is growing significantly, and we are gearing up for a huge expansion. ”

EF: How do you see the trends for care evolving in Poland?

BK: We are seeing a lot of digitalization across the sector. COVID-19 helped

us embrace digital solutions. For example, ECG tests can now be done remotely. Consumers can now use a Holter machine in the comfort of their own homes. All the data is then transmitted to a doctor sitting somewhere else. The doctor can then describe what he saw and send the results to your preferred GP. You can then connect with the GP remotely or in person to ask for the diagnosis and the final treatment. We are proud to assist and participate in this type of patient diagnosis.

When discussing outpatient clinics, many things can be done completely differently than they were a couple of years ago. We also use digital solutions for neuro treatment and dialysis that can be done at home. Connected outpatient care is something we want to focus on, as it helps to address the challenges that hospitals and healthcare professionals face, such as the increasing costs and number of patients. We strongly believe that outpatient care will be the future. Everyone can be a patient at any time; normally, we prefer to stay at home whenever it is possible not to be in the hospital. *Connected care is helping us make it possible for everyone. In other parts of our cluster, they are thinking about remote hospitals where patients stay home and are equipped with vital sign monitors and hospital beds. The monitors send messages to healthcare professionals who are sitting in the hospital. There is also a nurse who visits the patients and interacts with them. This is the future of healthcare.* Whenever possible, let us keep patients at home and diagnose them at home. Patients will be happier, and it will be cheaper. Connected outpatient care might be more effective than inpatient care because healing processes are sometimes faster when patients surround a patient.

EF: Baxter's latest financial results showed considerable growth in certain areas. How did this growth translate into the Polish region?

BK: All our business units are growing except for one, injectables of oncology products, where we faced generic competition. This is expected. In general, the market is not saturated in all the segments in which we operate. There are still patients who need treatment.

Apart from Hillrom, we have several different segments and portfolios. For example, we deliver food to patients' homes in the clinical nutrition segment. This segment is growing significantly in Poland. There are still patients who did not get this treatment and still should. Oncological patients and those who cannot normally eat and need this support are at the top of the list.

We also have advanced surgical products. These biological products help doctors stop bleeding during an operation or seal wounds on organs. Today, these products are best practices because they allow a safer environment for the doctor to operate. This is another part of our portfolio that is growing significantly. In Poland, the growth of advanced surgery products increased by more than 30% year over year.

We are shifting from old products to new ones in the anesthesia market. This shift is driving growth. Some patients still should be treated with more modern therapies but have not been treated due to economic factors. This is the fuel for our growth.

EF: There is a shift towards prevention via early diagnosis. How is Baxter helping with this conversation? What initiatives are you pursuing to drive awareness?

BK: An excellent example of an innovation that is a shift towards prevention via early diagnosis is the ICNET software. It is a solution whose

primary task and goal is to support the management of a health care facility, but also units supervising the entire area of infections and infection prevention. It is software whose main feature is interoperability. It can be integrated with various IT systems in the hospital, regardless of the provider of such software. It can network geographically within a province, region, or even country.

The software integrates data that comes from various types of system modules, such as a hospital pharmacy, laboratory, and data from medical devices, which are used to assess basic vital signs when a patient is admitted to the hospital, which can be a way to faster diagnostics, such as sepsis.

We have an advanced portfolio helping support the shift towards prevention.

“ In 2018, we built the Baxter Educational Center in Poland, where we promote education and train doctors. We have trained circa 18,000 people since our door opened. ”

This includes the doctors, nurses, pharmacists, and even some patients. Our center is a place of mutual inspiration. We invite experts, key opinion leaders, and top-class professors who train and share their knowledge with other healthcare professionals. The professionals talk to professionals, and we act as facilitators. We provide the space and stay in the background. Healthcare professionals appreciate this learning opportunity and the fact that we are not doing any kind of hard promotion of our products. Our room is purely educational and about shared skills in therapeutic areas such as anesthesiology, fluid therapy, acute kidney diseases, and nutrition.

The idea to support Ukrainian doctors came from our people. Ukraine is hit by rockets every day, and 200 hospitals have been destroyed fully, and more than 1500 hospitals and clinics have been damaged. We saw the conditions in which Ukrainian doctors must work daily, how many patients they have, and what challenges they face. We decided to help them from our stand, giving them mental support, training them, and letting them know they are not alone.

We have also embraced digital approaches in our portfolios. We have advanced surgery products, and our teams frequently work with doctors in operating theaters. We support other doctors by broadcasting from one operation theater to many others. *We observe the best and most experienced people to learn the best operating techniques. It is not about the promotion of our products; it is about the education of surgeons. We can reach hundreds of doctors, and they can question opinion leaders on the best techniques. They can see what the surgeon is doing and whether there are any mistakes.*

Our mission and vision are to save and sustain life, and we live with that mission. It is about our customers, patients, and doctors. It is also about us, the employees. We have plenty of activities for employees to sustain

our lives, like vaccinations, diagnostics, and meetings with dietitians and others. We get support for our physical and mental health. Whenever our employees feel they are doing it for themselves, they live our motto.

We have a lot of CSR activities that are driven from the bottom. We do not impose ideas on our staff, but people develop them. All opinions are welcome. I co-lead the onboarding program with the director of shared services. We meet with all the newcomers from IT, finance, and other fields. We share Baxter's history, philosophy, and vision with all our new employees. After the initial meetings, we received good feedback from the recruits that they were happy to join the MedTech industry. They felt they would be doing something important for people and working for a company bringing innovation.

EF: How do you foster a culture of a healthy work environment at Baxter?

BK: I have been in this position for two years. I have worked for more than five companies in my professional career and can make comparisons. The people at Baxter enjoy what they do. I saw it on the first day. They are nice people who have created a positive work culture.

Our team is made up of people from over 10 countries. We speak more than 10 languages at Baxter. *Our onboarding process is never in Polish because there is always at least one person who does not speak Polish. This fosters an inclusive spirit. Everything starts with the recruitment process. We want to have a diverse team. People in top leadership positions understand that a diverse group leads to better outcomes.*

Our gender ratio is almost 50/50; there are slightly more females than males. This is also seen in leadership positions. I am a woman, and the director of shared services is also a woman. The signal comes from the top. We globally aim to have more than 40 percent of leadership positions occupied by women, while in Poland, we have already reached 50%. We do not want to seem to favor women. Competencies are still the most important attribute. We have many talented women, and that has led to a change in the company structure from being male dominated.

At Baxter, development does not necessarily mean going up; it can also mean remaining at the same level but doing something different. That is necessary because you need experience in various fields to grab opportunities. If you come from finance and have never done anything but finance, you cannot reach positions at the C level. If you have experience in finance, HR, and marketing, you have three different possibilities to get the C level. This is why we have Baxter Academy and sponsor external courses with universities. We promote English lessons since that is the language of business. We do the right things, and we do it consistently.

EF: When you celebrate a year, what would you want to celebrate?

BK: I would thank my team first. They are great, and words cannot describe my admiration for them and their work. When I started this role, I came in with ideas about what I wanted to change. I took the time to listen and understand before I made any changes. We tend to look at past experiences and think the same things will work here as they did there. Every situation and every company is different. I learned to give my team space and time to speak up and give their opinions before making any changes. I would celebrate my team and thank them for their input and patience.

Andrzej Tarnkowski

CEO
Antar Orthopedics



EF: What was the reason for founding Antar twenty-five years ago? What opportunity did you see in the orthopedic industry?

AT: It wasn't exactly planned from the beginning to get where we are. I come from a family that works in the medical device industry. My mother introduced me to a company that was willing to enter the Polish Market, and this was how I got into the industry. As time went by, I continued working with other companies distributing in Poland.

During this journey, we have navigated through multiple challenges. One of them was the Polish healthcare system's implementation of public insurance. Insurance is still underfinanced and growing slowly compared to market needs, but luckily, has been growing along with us. The government is working toward improving the system, but there is still a lot to be done and much room for improvement. We have a new law regarding orthopedic devices, which marks huge progress. The second huge challenge we faced was when we decided to make the company international, as entering foreign markets is always challenging. We have moved into various markets and have a good presence in Europe.

We are a Polish company that manufactures locally in Szydłowiec that, in 2005, decided to enter the Czech Republic market; currently, we are one of the leaders in the orthopedic market there. In 2009, we opened offices in Slovakia and Belarus, and these two markets are also important to Antar, holding strong positions in both countries. However, we currently face challenges in Belarus due to the geopolitical situation and the Russia-Ukraine war. *In 2013, we opened an affiliate in Berlin, Germany, and we also supply most European companies through distributors. In terms of the future, we are always looking for new distributors, expanding the range of products we manufacture, and we want to take the company to other countries such as, the United States and India.*

EF: What do you find most exciting about the new Polish regulation framework?

AT: *The regulatory framework has been modernized to match today's market. Before, it covered products that were already obsolete, whereas now it covers modern and new products, a trend that currently exists in all industries where modernization is key. We have made huge steps forward compared with other European countries, such as the Czech Republic or Slovakia.*

The employment of Polish people is one of Antar's biggest contributions. Our plant is located near Radom, 150 km South of Warsaw, and the area has the lowest unemployment rate in Poland, and the area has the lowest unemployment rate in Poland.

EF: What makes you the partner of choice of many companies?

AT: We choose our suppliers, and regarding customers, we provide a huge range of products. *We cover a broad scope and many needs, so it is inevitable for other companies to look for us. We are among the most innovative companies, always introducing new ideas in our products; even when we are not innovating within our product lines, we are always adding something new, looking to answer customers' needs.*

EF: How do you evaluate the importance of educating patients and physicians in using orthopedic products, and what are you doing to advance this, other than participating in fairs?

AT: We inform and educate the people who help patients find the right product and how to install it. *In Poland, we educate medical staff in medical stores because they have to choose the best product for the patient and teach them how to use it. In Czech Republic and Slovakia, because the market is different, we work on*

educating the physicians as they decide which product to use, so they must know what to recommend and show the patient how they should use the product. We adapt what and who we teach in each country to have the best reach for our products.

EF: Does your portfolio vary in each country, or do you have one portfolio that you distribute over Europe?

AT: We have one portfolio for all, but certain countries tend to want certain products. *When we introduce a new product into our portfolio, it is available everywhere, and anybody can access any article regardless of the country. However, certain countries are interested in different products. For example, we introduced pneumatic boots in Poland, which were very popular for many years. In contrast, they were virtually unknown in the Czech Republic until they suddenly became popular there.*

Since introducing electric wheelchairs, they have become our star product. Electric wheelchairs were a luxury product until we presented a product that is available and affordable to most people, and since then, it has become the company's star product. However, this can change; it could be a completely different product in a few years.

EF: What quality assurance measures do you implement in your product lines, for example, in your Antar Blue Line, which is your flagship line?

AT: That line is a class one medical device, and before we can launch it, it must pass the medical device approval procedure, which involves meeting certain standards of safety and quality. Meeting all the ISO 13485 quality control standards takes time. There is also a quality design process to ensure it is safe. First, we have the quality control in production, then the design, comfort, and safety control. *We often change products in response to consumer demands; after we launch a product, customers give us feedback on what can be improved, and many times, we adjust the product with small modifications.*

EF: Antar is a local success story; what would be your advice to other companies interested in doing something similar in your sector in Poland?

AT: Poland is not an easy market; the road to success is varied, and companies have alternative incentives and ways to achieve their goals, but we tend to diversify. *I advise going into a large range of products; our way of doing things is always to try to introduce something new.*

EF: What would be your three main pillars to build a sustainable future for healthcare?"

AT: *My first pillar would be innovation; my second would be competitive pricing (affordability), an especially important factor in Poland, and my third would be quality and design, a smart product. Price is important in Poland, whereas, in other countries, more attention is paid to quality and design. In Poland, innovation is important; people like new products, and when we launch new products, they go to market faster, but they have to be attractive in price. We want them to look nice, but price is always the deciding factor, so we aim to create something attractive and affordable.*

EF: You will be celebrating the company's twenty-fifth anniversary soon; after all these years, what are you most proud of achieving? After all these years, what are you most proud of achieving?

AT: *We are proud to have gone international and opened our way in Central Europe. We believe we have the potential to expand to the United States and India. Outside Europe, people react differently to European products; they have value in themselves, and even if they are more expensive and not everyone can afford them, they hold prestige for many.*

Rafał Szmuc

Co-Founder & COO
Clininote



EF: From your perspective, how do you see 2024, and why did you join the healthcare industry?

RS: In the past few years, I've been actively involved in practical healthcare management, specifically in the operational aspects of running hospitals. My focus has been on enhancing the efficiency, cost-effectiveness, and overall processes of day-to-day healthcare operations. Now, I've transitioned to the digital and startup domain, where we're spearheading a significant shift. *We strongly believe that digital healthcare has the potential to revolutionize the entire healthcare landscape. In 2024, we anticipate a transformative change in how people, patients, and especially doctors perceive digital healthcare. In healthcare, organized and easily accessible data is becoming crucial for doctors. It's not about changing their artistry to engineering but making their art more responsible and practical.*

“ Additionally, exchanging patient data between countries can be lifesaving, especially for rare diseases or cancers with only a few cases per country. Collaboration and data exchange across borders become essential to properly treat patients and save lives. ”

EF: Could you elaborate on the journey that you have done with CliniNote and the gap you identified when you started in 2020?

RS: *We started CliniNote with a clear goal—simplifying access to medical data. Imagine top-notch European medical professionals facing the same daily struggle, being told to wait months for data. As the CliniNote co-founders we decided it was time for a change. Our initial focus was making physicians' collected data more accessible, readable, and organized. Delving into healthcare data science, we uncovered that about 90% of healthcare data is dark data—unstructured and challenging to analyze. This meant that traditional AI, trained on only 10% of available data, was limited.*

EF: Could you elaborate on the partnerships and how do you see the role of companies like yours and partnerships evolving into the future? And how can these partnerships add value to bigger and well-established organizations?

RS: *Novartis is a well renowned pharma company that is working with us, and we are working together with one of Poland's key oncology hospitals, Kopernik, measuring healthcare quality and true medical outcomes. They found that existing data couldn't truly showcase their quality to regulators, ministries, or patients. Most big initiatives within Novartis focus on core businesses like drug development, and hospitals primarily focus on patient care rather than innovation. This is where we step in. We focus on tweaking small things to create big changes. Startups like*

ours are crucial for market change, as hospitals, constrained by responsibility for patient quality and limited budgets, can't easily innovate without external support.

EF: How do you see the willingness of hospitals to adopt technologies, and how can we change this?

RS: There are two sides to the story – the doctors clearly grasp the need for change in healthcare. They understand that digital healthcare is the future, but the challenge lies in making this adoption feasible. The primary hurdle for hospitals and physicians is the persistent lack of time. It's a trade-off of whether to invest more time in adopting new tools or focusing on daily patient care, which doesn't change their future. To tackle this, I believe initiatives like private-public partnerships, large programs, or startup challenges can play a vital role. They provide financing for extra resources needed for adoption, which is a critical step to break into the system.

Entering hospitals and gaining them as their first ambassadors is crucial, and proven solutions like CliniNote make this easier. The initial challenge is breaking down the barriers, but once in, proving the benefits becomes more manageable. I believe a systemic approach, whether at a country or European level, is needed to finance pilot programs, allowing people to try and fail. From these failures, we learn and pave the way for successes that can revolutionize healthcare. There's hesitancy in European healthcare systems, with concerns that many initiatives may fail. However, failure is a part of the learning process. The key is opening doors, supporting startups, hospitals, and institutions to take the first step. Once this hurdle is crossed, the path forward becomes much smoother. I am hopeful that Novartis and Kopernik will serve as excellent examples of successful innovation in healthcare.

EF: Do you think the current framework allows companies to grow, evolve, and succeed?

RS: Stepping into healthcare, like all startups, we must recognize the necessity of regulation—especially when it concerns patients' lives. It's a highly regulated field, and there's no way around it. Experimentation is key, but it comes with its share of successes and failures at different stages. Currently, the regulatory framework often feels like it's more about blocking untested ideas. *New laws like European Health Data Space may signal a shift toward a more innovative environment. It might not soften regulations but could allow for a gradual approach. Starting innovations requires flexibility, testing, and checking, but as collaborations deepen, more regulation becomes necessary.* For instance, to be a medical device company, we'd need to adhere to stringent requirements. Navigating regulations is crucial. A good lawyer is a startup's ally, ensuring compliance with the law. It's paperwork-heavy, but it's the only way to go the distance. Regulation, despite its challenges, remains a critical part of driving change in healthcare.

EF: Do you have any final message?

RS: *Our main message is simple: we empower data-driven medicine. Data-driven medicine can save more lives than we realize. It's crucial to focus on the data we gather and share. There's a need to pay attention to our data for a healthier future.*

Chapter 5

Polish Power

“Poland is the 5th largest country in the European Union, with a population of around 37 million. Among the EU nations, Poland’s economy holds the sixth position. Poland is well known for its well-educated and hard-working labor force.”
Arkadiusz Grądkowski – Chief Executive Officer, Polish Chamber Of Commerce Of Medical Devices, POLMED

Polish healthcare and life sciences companies, with their recognized innovative approaches and growing contributions to national health and economic prosperity, are leveraging their workforce strengths and strategic location in Central and Eastern Europe to continually improve the position of Poland as a significant force in the European healthcare ecosystem.

Local Success Stories



Poland, in the last two decades, has witnessed a growth in local businesses and startups which play a vital role in driving innovation and shaping the landscape of the healthcare field. These companies leverage a competitive spirit, strategic investments in technology, opportune locations, or manufacturing practices to address various healthcare challenges as they vie for growth and innovation in a country with obvious potential for entrepreneurial success. By embracing agility and flexibility, and with the benefit of being intimately aware of logistical concerns in their home countries, local businesses are often at the forefront of pioneering new approaches to healthcare delivery, offering more accessible, affordable, and patient-centric products and services. These companies, often growing within niche markets and exploring new ideas, foster collaboration and partnerships across different sectors, including academia, industry, and government, to accelerate the development and adoption of innovative healthcare solutions.

Polpharma

The largest Polish manufacturer of pharmaceuticals and a leader in the Polish pharmaceutical market. It operates in Central and Eastern Europe, the Caucasus, and Central Asia. With over 4300 employees and 5 manufacturing plants, they also work on patient friendly drugs at 3 R&D Centers.

Adamed

With 2 manufacturing plants in Ksawerów and Pabianice Adamed is the second largest local pharmaceutical company in Poland. With a focus on research and development, Adamed strives to improve the lives of patients worldwide.

Aflofarm

One of the largest and most recognizable pharmaceutical companies in Poland, it has been operating in the healthcare sector for over 30 years. It is a leader in the OTC pharmaceuticals market, and excels in family business rankings and humanitarian efforts.

NEUCA

A leading company in the wholesale distribution of pharmaceuticals in Poland. It is also active in areas like pharmaceutical production, marketing, logistics, and telemedicine

Antar

Antar Orthopedics, a Polish company producing healthcare products since 1998, has experienced great success by combining sound business decisions with the high-quality manufacturing standards that people in Poland and across the EU have come to expect from local production. Antar CEO **Andrzej Tarnkowski** explains that while his company has been successful in its expansion within Europe, they are continuing to aim higher. *“In terms of the future, we are always looking for new distributors, expanding the range of products we manufacture, and we want to take the company to other countries such as, the United States and India.”*



Clininote

“Imagine top-notch European medical professionals facing the same daily

struggle, being told to wait months for data. As the CliniNote co-founders we decided it was time for a change.”

Rafał Szmuc, Co-Founder & COO of CliniNote recounts how CliniNote has already contributed to increasing usability of collected data for the benefit of hospitals and the pharmaceutical industry, partnering with well-known pharma company Novartis and one of Poland’s key oncology hospitals, Kopernik. *“They found that existing data couldn’t truly showcase their quality to regulators, ministries, or patients. Most big initiatives within Novartis focus on core businesses like drug development, and hospitals primarily focus on patient care rather than innovation. This is where we step in. We focus on tweaking small things to create big changes”.*



Proteon Pharmaceuticals

Prof. Jarosław Dastych, Founder & CEO of Proteon Pharmaceuticals, has a clear mission: to harness technology as a powerful tool for positive disruption in the healthcare industry. *“In my perspective, technological advancement is not just an option, it is a necessity for tackling problems and driving progress.”* The problem in question is Antimicrobial Resistance (AMR).



Looking ahead, **Professor Dastych** envisions a future where bacteriophage technology plays a central role in microbiome research and healthcare. With the development of self-learning algorithms and AI-driven tools, Proteon aims to unlock the full potential of bacteriophages in addressing diverse health challenges and improving overall well-being.

Molecure

In the fast-paced realm of biotechnology, a plethora of opportunities exist that promise to transform the world of healthcare as we know it. Poland’s Molecure S.A. emerges as such a beacon of innovation. Founder and CEO **Marcin Szumowski** epitomizes the relentless pursuit of scientific advancement and the quest to address unmet medical needs worldwide while assuming the necessary risk.



“Aim high, dream big, stay focused, and be stubborn in your strategic goals as an entrepreneur. Never give up, never surrender,” **Marcin** says.

Final Remarks: Insights from Healthcare Leaders in Poland

Over the course of our comprehensive interviews with the leaders in the Polish healthcare sector, several critical insights and trends have emerged. These findings highlight the current challenges and opportunities within the industry, as well as strategic directions for the future.

1. Resilience and Adaptation Amidst Challenges

Polish healthcare leaders emphasize the resilience of the healthcare system despite numerous challenges. The sector faces significant pressures from an aging population, increasing incidences of non-communicable diseases such as cardiovascular diseases, cancer, and diabetes, as well as rising antimicrobial resistance and the looming threat of new pandemics. However, the system's ability to adapt and evolve has been a recurrent theme, showcasing a robust response to these multifaceted challenges.

2. Economic Stability and Growth Potential

Poland's economic resilience, even during global catastrophes such as the 2008 financial crisis, has provided a stable foundation for healthcare advancements. The growth trajectory of Poland's GDP continues to offer a supportive backdrop for healthcare reforms and investments. Leaders are optimistic about the potential for economic conditions to further enhance healthcare infrastructure and service delivery.

3. Innovation and Digital Transformation

A major focus is placed on the need for healthcare systems to become more patient-centric, digitally advanced, and sustainable. Innovations in medical and diagnostic technologies are crucial for this transformation. Leaders highlighted the importance of integrating digital tools to improve patient outcomes and system efficiencies. The push towards digital health is not just a trend but a necessary evolution to meet the growing demands of the population.

4. Strategic Regulatory Environment

The regulatory framework in Poland is evolving to better support healthcare innovations while ensuring patient safety. The establishment of new regulations, such as the European Health Data Space,

signals a shift towards a more supportive environment for healthcare startups and innovations. This regulatory evolution is crucial for fostering an ecosystem where new ideas can be tested and scaled effectively.

5. Importance of Data and Collaboration

Data-driven medicine is recognized as a transformative force in healthcare. Leaders underscored the critical role of data in improving healthcare outcomes and enabling precision medicine. Collaborative efforts at both national and European levels are essential for harnessing the full potential of health data. The emphasis on data security and compliance with regulations such as GDPR highlights the commitment to safeguarding patient information while leveraging data for medical advancements.

6. Sustainability and Environmental Considerations

Sustainability within the healthcare sector is gaining prominence. The Polish Hospital Federation's focus on environmental, social, and governance (ESG) criteria exemplifies a broader commitment to sustainable healthcare practices. Efforts to integrate sustainability into healthcare operations are expected to yield long-term benefits, including improved patient care and operational efficiencies.

Conclusion

The insights from Polish healthcare leaders paint a picture of a sector that is dynamic, resilient, and forward-looking. While challenges are significant, the commitment to innovation, digital transformation, and sustainable practices offers a hopeful outlook for the future of healthcare in Poland. As the industry continues to evolve, the collaborative efforts of policymakers, healthcare providers, and technological innovators will be crucial in shaping a healthcare system that is responsive to the needs of its population.

Thank you.



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