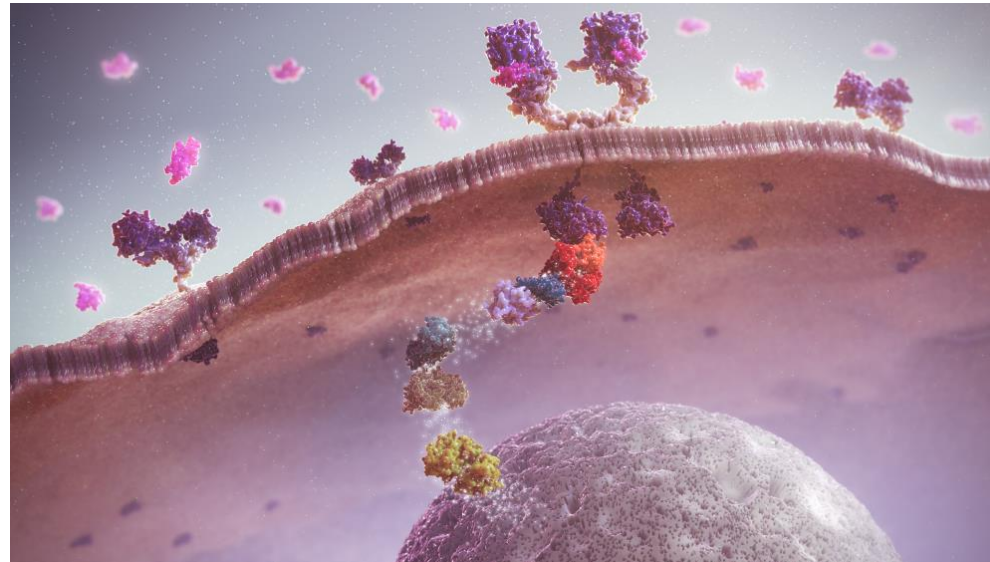




Does Poland have the potential to become the next cancer research hub?

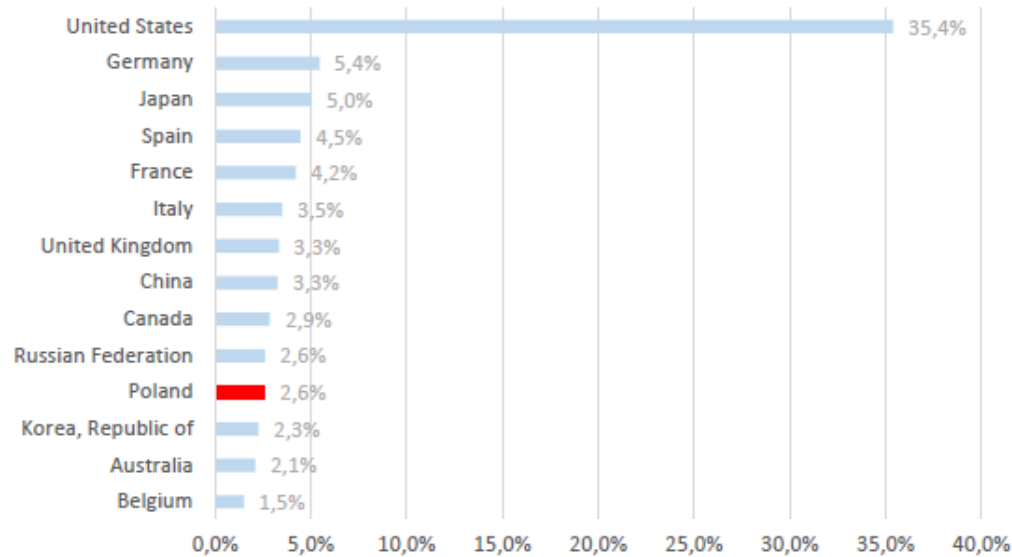


Wiktor Janicki
Country President AstraZeneca Poland

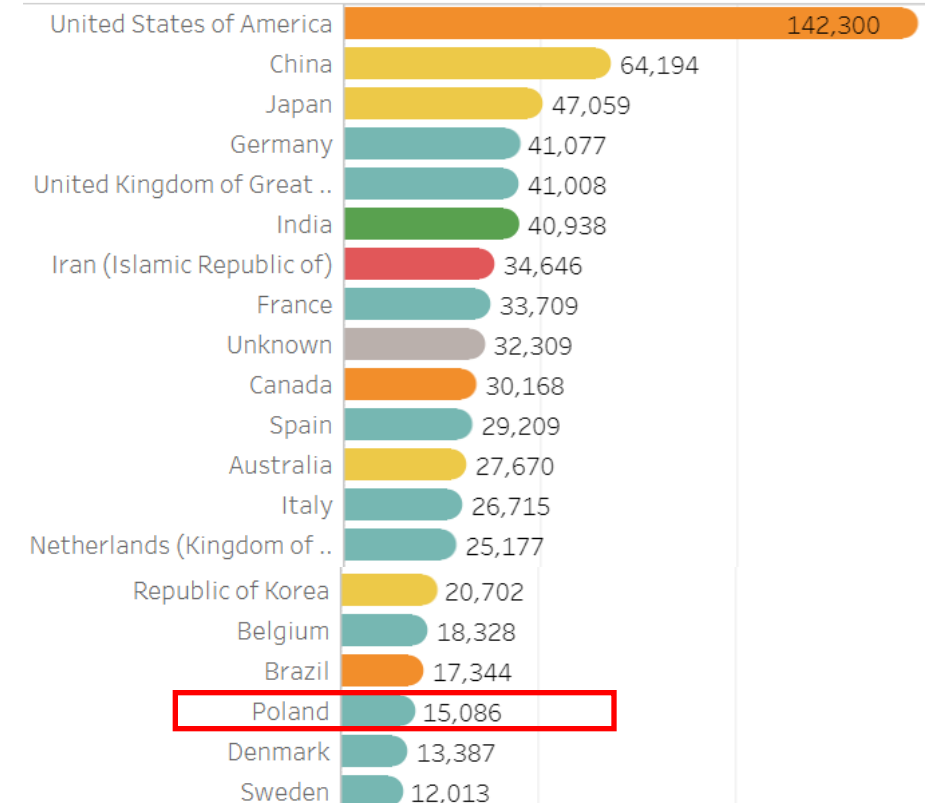
FACILITATE DEBATE ACTIVATE INNOVATE

Poland and its potential in industry CTs

*Global Industry CTs market share
Year 2019, All Phases*

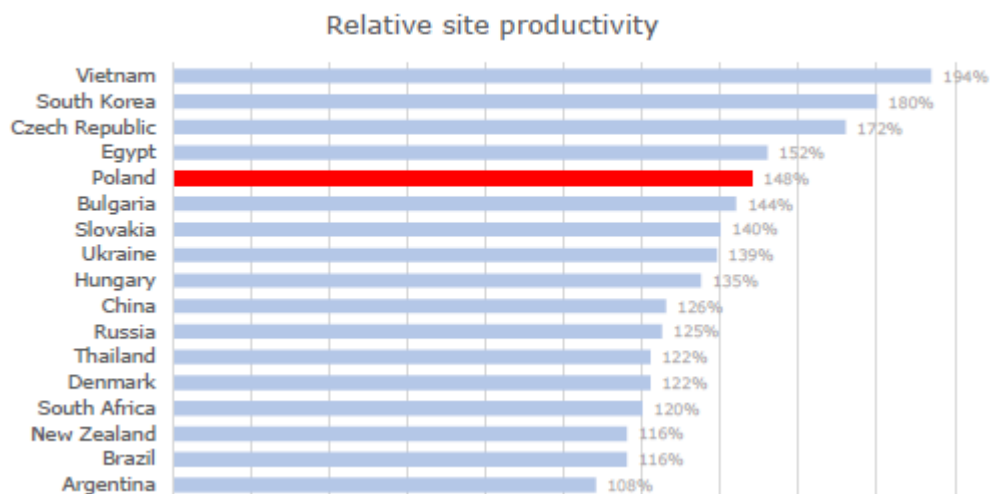


Source: Industry Clinical trials in Poland report, 2019



Source: World Health Organization, 2023

And the sites in Poland deliver



Source: Industry Clinical trials in Poland report, 2019

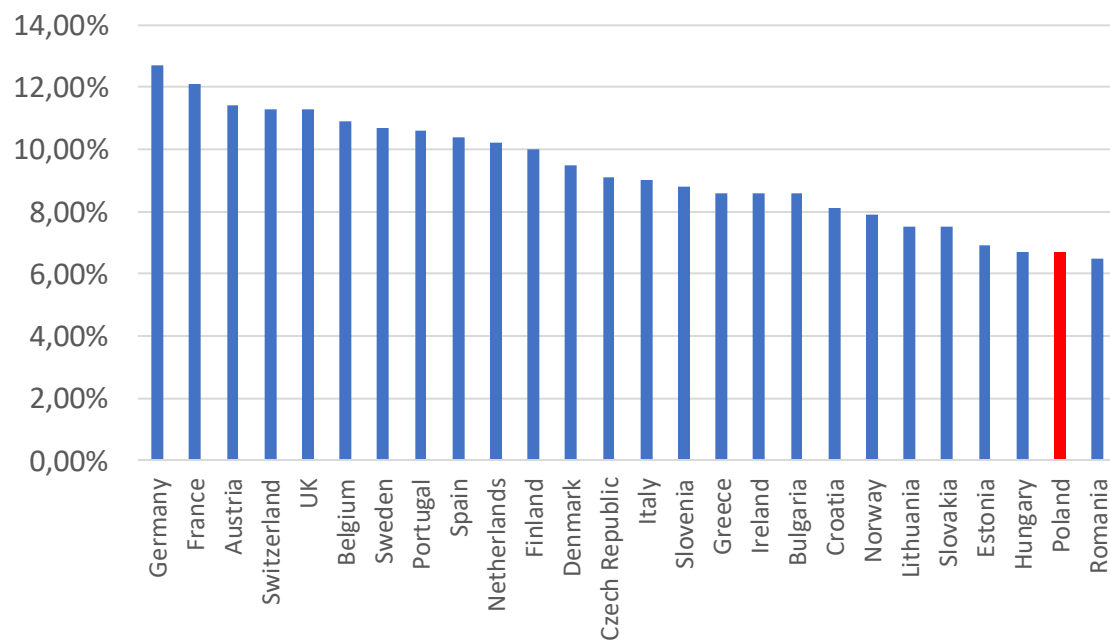
US FDA Bioresearch monitoring inspections 2008-2020 US FDA and severity of findings

US FDA Bioresearch Monitoring Inspections								
	Finding severity 2008-2013			2008-2013 # Inspections	Finding severity 2014-2020			2014-2020 # Inspections
	NAI	OAI	VAI		NAI	OAI	VAI	
North America	50,9%	6,8%	42,3%	2253	67,6%	2,0%	30,4%	3423
United States	50,8%	6,9%	42,3%	2215	67,1%	2,0%	31,0%	3331
Canada	55,3%	2,6%	42,1%	38	88,0%	1,1%	10,9%	92
Western Europe	49,5%	0,9%	49,5%	214	71,2%	0,9%	27,9%	337
Germany	51,8%	0,0%	48,2%	56	79,7%	0,0%	20,3%	59
United Kingdom	33,3%	3,3%	63,3%	30	74,3%	0,0%	25,7%	35
Spain	73,3%	6,7%	20,0%	15	65,9%	0,0%	34,1%	41
Italy	59,1%	0,0%	40,9%	22	64,4%	0,0%	35,6%	45
France	50,0%	0,0%	50,0%	38	73,5%	4,4%	22,1%	68
Belgium	66,7%	0,0%	33,3%	6	68,4%	0,0%	31,6%	19
Netherlands	44,4%	0,0%	55,6%	9	66,7%	0,0%	33,3%	21
Norway	66,7%	0,0%	33,3%	6	100,0%	0,0%	0,0%	1
Eastern Europe	64,0%	0,5%	35,5%	203	79,3%	0,0%	20,7%	280
Poland	69,1%	0,0%	30,9%	55	72,7%	0,0%	27,3%	88
Bulgaria	28,6%	0,0%	71,4%	7	87,5%	0,0%	12,5%	16
Czech Republic	61,1%	0,0%	38,9%	18	84,0%	0,0%	16,0%	25
Hungary	60,0%	0,0%	40,0%	10	67,6%	0,0%	32,4%	34
Romania	66,7%	0,0%	33,3%	12	86,1%	0,0%	13,9%	36
Slovakia	33,3%	0,0%	66,7%	3	100,0%	0,0%	0,0%	3

Source: <https://www.fda.gov/inspections-compliance-enforcement-and-criminal-investigations/inspection-classification-database>

There is still potential

Health expenditure as % GDP



	2014	2024	% var
NHF Budget bn PLN	64,30	166,93	259,6%
NHF Budget bn USD	14,61	37,94	

How it all started

In 2011 AstraZeneca made a decision to locate its new Global R&D Center in Poland

It started with a team of 60 CT professionals

Key factors for the establishment of Global R&D Center

External

Internal

Lifescience talent

Ability to take risk

Human capital
potential

Experienced team

Good university
base

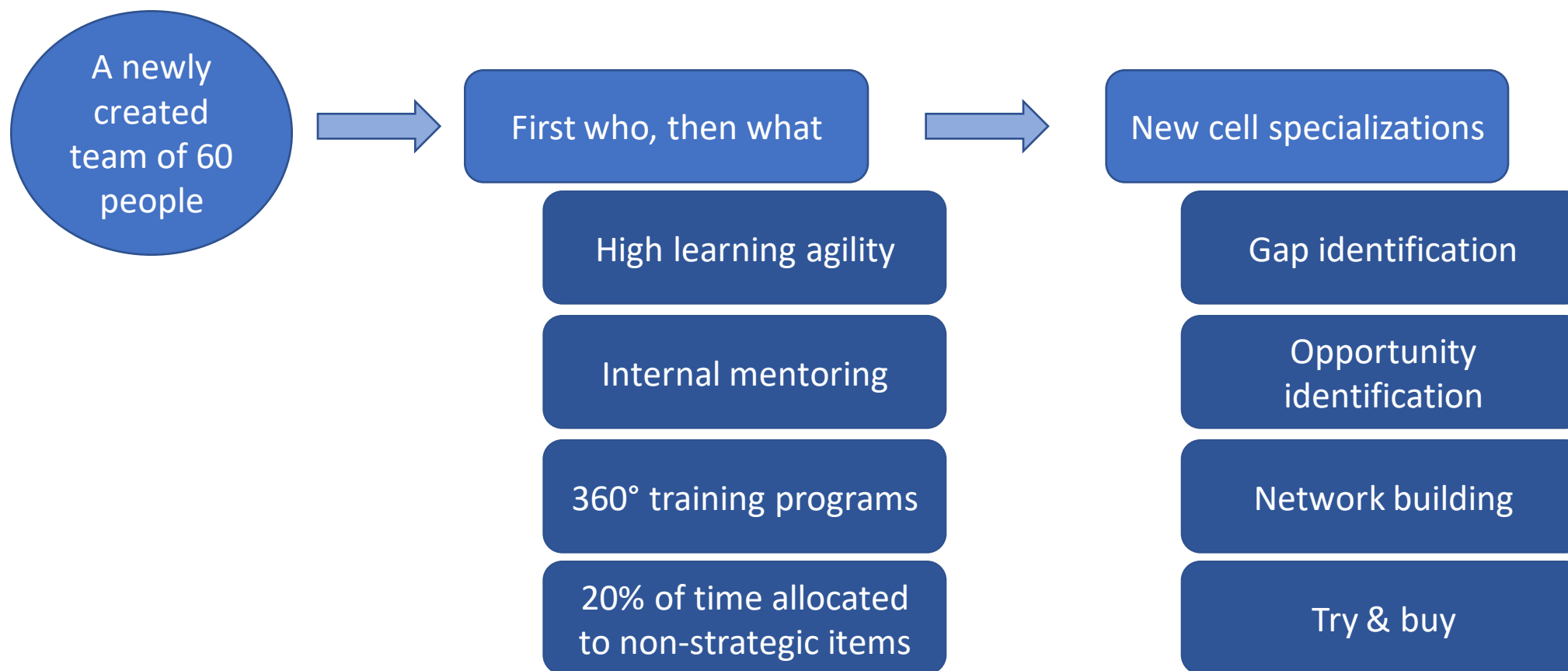
Labour arbitrage

Strong and stable
GDP growth

Track record of
delivery



How it developed – stem cell culture



AstraZeneca current presence in Poland

No. of AZ employees in Poland

