



one
ALL IN
a PHOENIX service

MAGAZINE



FOCUS TOPIC

CLINICAL TRIAL SUPPLY SERVICES
ADDING THE PIECES FOR YOUR SUCCESSFUL TRIAL



Dear reader,

The new year 2017 has started. We continue to provide and optimise services for you along the entire value chain. Our services range from production to point of sale **generating more revenue** at multiple different stages, **securing and growing your market share** as well as realising **cost savings** and increased NWC. Our clear focus is to offer you tailor-made solutions – talk to us how we can help you.

In this edition of the All-in-One magazine, you'll find articles about our different focus areas. Learn more about our first BI Patient Centricity webinar with guest speakers from MSD. We take a look at the value of a Partnership with us in an interview with our long-time partner TEVA and you'll find information from our international Healthcare Logistics network.

Kind regards
Stefan Jung
Head of Pharma Services

CONTENTS

01

- 03 High interest in first All-in-One webinar
- 04 Commercial Partnerships
- 05 "Trusted, valued and long-standing": Interview with Emma Akpan-Bush, TEVA
- 06 Reliable logistics network: CEE Bridge
- 07 Clinical Trial Expertise within Europe

02

- 08 Denmark: Full Range Clinical Supply
- 09 Germany: Supply Chain Optimisation
- 10 Czech Republic / Slovakia: Manufacturer Event
- 11 Baltics: New warehouse and successful events

03

- 12 All-in-One country updates

The **All-in-One magazine** is published by PHOENIX Pharmahandel GmbH & Co KG, Pharma Services, Pfingstweidstraße 10-12, 68199 Mannheim, Germany. Editorial team: Olaf Christiansen (chief editor; o.christiansen@phoenixgroup.eu), Jenny Allert, Petra Ciperova, Leah Davies, Kestutis Dubinka, Mai Loan Le, Paul Gifford, Nemanja Jankovic, Petr Novotny, Radoslav Prihoda, Roberta Sakelyte, Sandra Schomburg, Casper Koch Villumsen. All rights reserved, no part of this publication may be reproduced without prior permission by the publisher. Printed by Charterhouse Production, January 2017.



„BETTER WORK WITH PARTNERS“

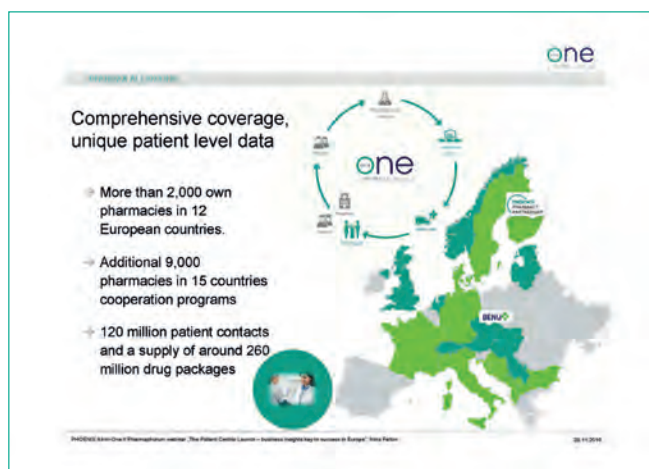
“Patient Centricity” is a buzz word in the healthcare sector. In our first All-in-One webinar “The Patient Centric Launch: Business insights key to success in Europe”, Nina Felton, Head of Business Intelligence at PHOENIX group and two guest speakers from MSD discussed the needs and solutions around launches in Europe.



Nina Felton, Head of Business Intelligence, and Olaf Christiansen, Head of Marketing, prepare the webinar.

Nina Felton, Head of Business Intelligence at PHOENIX group, Larry R Smith II, Executive Director, Capability and Innovation Accelerator (CIA), MSD, and Nick Cooper, EUCAN Regional Marketing Team, MSD, talked about the challenges and solutions for the industry. The webinar was organised and moderated by pharmaphorum.

The experts discussed the importance of Patient Centricity in daily business and especially when launching products in Europe. Nina explained how PHOENIX All-in-One can help with patient potential, patient identification and patient support as well as measuring the success. With over 14,000 pharmacies we have access to data on patient level throughout Europe that can help in deciding how to leverage the **patient potential** with limited resources and understand the levers in the patient “eco-system”. With the proper **patient identification**, we ensure the appropriate medication with insights into patient behaviour and help patients staying on the drug with **patient support** and adherence programs. The patient level data is anonymised and only analysed at an aggregated level without any sensitive information shared.



Informative insight into Patient Centricity provided by PHOENIX All-in-One.

And finally, we have the data from over 120 million patient contacts a year to measure the success of launches.

Larry from MSD HQ made clear in his final statement in the webinar, that “we’ve seen that *launch strategy is what we call a ‘team sport’*. And it’s not only within MSD but with our partners such as working with someone like PHOENIX group. If we don’t have this core competency and PHOENIX has it – we are better together. We can do a better job in recognising that by working with companies like yours. And I think this is part of the change management that my group does if we can’t do it at all, we need to work with other companies like yours.”

Webcast of the webinar

If you missed the webinar: The one-hour session is available as a webcast - just scan the QR code with your smartphone to watch.



COMMERCIAL PARTNERSHIPS



At the time of increased challenges, the pharmaceutical industry more than ever needs reliable partners to help growing the business. The All-in-One European Commercial Partnership is the right answer to this. Our partners benefit from our size and unparalleled access to pharmacies in Europe, expertise of local markets, and holistic approach with various services to supporting their needs and growth.

PHOENIX group has access to more than 14,000 pharmacies, both in ownership and in cooperation models within the PHOENIX Pharmacy Partnership, with more than 120 million patient contacts each year. We use all that potential to establish strategic commercial partnerships with our partners to help growing the sales on **incremental basis** above the existing sales. An important base for building strong partnerships is trust that takes years to build and is always part of long-term thinking.

"Commercial Partnerships is therefore a special service, a two-sided relationship with strategically selected partners that have preferred access to our huge network of different trade channels opening up significant opportunities for growth" says Stefan Jung, Head of Pharma Services. "With around 2,000 own pharmacies in 12 countries and another 12,000 pharmacy cooperation partners in 15 countries all over Europe, we have unparalleled access to pharmacies in Europe".

„Commercial Partnerships is a two-sided relationship with strategically selected partners“ (Stefan Jung, Head of Pharma Services, PHOENIX group)

The involvement of All-in-One helps in coordination and making our partner's activities a priority on regional or European level. Within Commercial Partnerships, we use different sales and non-sales levers to help growing the sales across different trade channels. We aim to develop tailor-made solutions for and together with our partners taking into account differences across markets and our partner's specific needs.

Being concrete, that means for example starting common marketing initiatives, such as the vacci-



Over 1,150 German pharmacies participated in the 2016 Vaccination Awareness Campaign.

nation campaign in 2016 in Germany (see picture). This campaign included activities that helped raising the awareness among patients about the importance of flu vaccination.

In different markets, PHOENIX can offer activities in the pharmacy, which are not limited to sales force activities, e-marketing tools and publications. Activities include also trade discount schemes and various activities such as category management and loyalty programs.

Trust needs to grow between people – that is why constant exchange on all hierarchy and organisation levels in such a partnership is necessary.

*"Commercial Partnerships is a **proven business model**. Our partners benefit from the European approach and coordination, improved access to pharmacies and the range of value-added services. We invest our experience and expertise of local markets to create a win-win situation and to grow your business", says Nemanja Jankovic, Head of Partnerships at PHOENIX Pharma Services.*

All-in-One Commercial Partnerships is creating **WIN-WIN-WIN situations for all of us!**

Contact us for more information:
partnerships@phoenix-all-in-one.eu

“TRUSTED AND VALUED”



For more than six years, PHOENIX group and TEVA have had a trusted and valued preferred partnership in Europe with many successes on European and local level. We spoke with Emma Akpan-Bush, Senior Director, Strategic Accounts & Business Processes at TEVA Pharmaceuticals Europe BV.



Thank you for taking the time to speak with us, Emma. What do you currently see as the biggest challenges for the pharmaceutical industry, where an integrated healthcare provider like PHOENIX group can help?

There are many challenges facing our industry, including affordable, sustainable funding for medicines and reliable supply to name a few. Key to operating in this industry is ensuring the supply and access of medicines to our patients who need them most. Working with PHOENIX we can ensure that we are partnering with a healthcare company who can provide a reliable and established wholesale network of supply to our patients through their pharmacy chains and pharmacy customers within the European region.

PHOENIX offers a range of value-added services under the All-in-One brand. Which of those services do you perceive as most important to support the industry’s current needs?

We anticipate a holistic approach and accessing various services is the key to supporting the industry and our needs. We utilise the elements of Healthcare Logistics, Wholesale and Pharmacies within the PHOENIX All-in-One concept in varying degrees across Europe.

“Trusted, valued and long standing relationship over many many years.”

What value do you see in having a partner like PHOENIX in Europe?

PHOENIX is a Pan-European player offering broad coverage, and as TEVA we appreciate working with a partner who is big enough to cope with the demands of supplying our vast portfolio, but small enough to care and have the local know-how to op-

erate in the individual markets across the region to get our medicines to those who need them most.

How would you describe the partnership between TEVA and PHOENIX?

Our partnership is a trusted, valued and long standing relationship over many many years. During this time, whilst both businesses have evolved and expanded in geography and/or channel, we have evaluated how we can further strengthen our collaboration for the benefit of us all. We now operate together in more than 20 countries from pre-wholesale partnerships, to wholesale and distribution services, to pharmacy activity.

What are the most important common success stories in the partnership between TEVA and PHOENIX that you can think of?

We have had many successes, at country and regional level over the years, where we have worked to build our business and serve our patients, but there is one story that sticks in my mind this year which benefits everyone concerned. The German teams recently worked on a programme to reduce product defects which is a problem for both parties. “Product defects” occur when medicines that people ask for are not available. Working together with PHOENIX, the German Key Account-Team in a cross-collaborative effort with other departments such as Supply-Chain, were able to achieve a 50 percent reduction in product defects. This type of work helps us to optimise our patient care and credibility and image for patients, pharmacists, healthcare professionals and wholesalers. I’m very proud of what the team achieved!



*Emma Akpan-Bush,
TEVA Europe*

RELIABLE NETWORK



With “CEE Bridge”, PHOENIX group is your stable and reliable partner with an extensive network in Central and Eastern Europe and the Baltics. We combine regional, sub-regional and local structures for one network.

Europe may be one continent, but still has many different cultures and legal requirements, especially in Central and Eastern Europe. PHOENIX group is strong in this region with successful companies in almost all countries.

With CEE Bridge, PHOENIX All-in-One offers a professional healthcare logistics solution with different forms of cooperation – traditional logistics, consignment or 3PL approach is applicable. Our services are fully GDP compliant with temperature monitoring and recording of all storage and transport conditions. No matter if you are looking for line haul, cross country single or multi-pallet services – we have a high degree of flexibility and tailor made solutions in transport services for primary and secondary distribution.

We take care of international alignment and coordination, have a track and trace monitoring as well as POD (Proof of Delivery) system in place and offer numerous value added support (VAS) services for you.

To make sure that you get the highest quality standards throughout the system, we have established a method of alignment and managing the Quality System of the CEE Bridge Healthcare

Logistics network. This system sets minimum requirements for our hubs and all Pre-Wholesale warehouses involved in Healthcare Logistics, based on EU GDP/GMP directives, ISO standards and common requirements of you, our customers.

Our quality tool consists of a validated central data base for Non Conformance and CAPA handling and supplier audits and is live for our hubs in Serbia, Poland and the Czech Republic. The implementation in additional European countries is ongoing.



Opening of new Belgrade Hub

The official grand opening of our new Healthcare Logistics hub with full supporting infrastructure on site in Belgrade, Serbia will take place on Tuesday, 28th March 2017. Read more about the opening and the facility in the next edition of this All-in-One magazine.



CLINICAL TRIAL EXPERTISE



Having experience in the area of clinical trials was rated the most important feature for clinical trials in our All-in-One manufacturer survey in August 2016. Being an integrated family-owned healthcare provider in 26 European countries, we have been covering the entire value chain and nearly the whole European market for more than 20 years.

With our **experience** and local expertise of handling all kinds of medical products under different conditions we will benefit to the success of your trial. Every clinical trial is different and needs special planning.

With our **local and European expertise**, we support you in the supply planning of all necessary components for the trial, and we develop a tailor-made solution together with you. **Time** is often one of the most critical factors - we make sure that your product is at the right place at the right time – all of that of course under the highest quality standards.

As a full-line wholesaler, we collaborate with most pharmaceutical manufacturers to deliver medicines to patients and develop new logistics



concepts. Therefore, we have **access** to all necessary supplements and are the ideal partner to also take care of the sourcing of your comparator drugs, add-on and rescue medication as well as packaging material.

In case you need blinding or labelling of your products, we have all necessary **certificates** for

that and are happy to provide you with a solution according to your needs.

With our All-in-One Clinical Trial Supply Services, we offer a broad range of value added services out of one hand in many countries across Europe, and the best thing is: You can access all that through **one point of contact:**

clinicaltrials@phoenix-all-in-one.eu.

Most important features regarding Clinical Trials

Source: Online-Survey All-in-One 14/07/2016 – 23/08/2016 done by PHOENIX group market research.



Visit us at a conference

Our Clinical Trial Supply Services experts will be present at the



Clinical Trials Supply Europe
Barcelona, Spain
15-16 March 2017



LogiPharma Europe
Montreux, Switzerland
25-27 April 2017

FULL RANGE CLINICAL SUPPLY



PHOENIX All-in-One combines the expertise from all over Europe: The Clinical Trial Supply Services from Nomeco CTSM, a PHOENIX company, based in Copenhagen, Denmark, offers unique and tailored solutions providing security, streamlined processes and expert knowledge to your studies.



Nomeco CTSM's services vary from the very early stages of study planning and randomization, GMP packaging and GDP distribution of medicines for clinical trials to optimizing the supply chain strategy. Our aim is to achieve the most cost-efficient solutions without jeopardizing with strict timelines and quality requirements.

The Danish services are conducted by our dedicated and experienced staff who will ensure that all procedures and activities are fully compliant to GDP and GMP.



the responsibility for your clinical trial supply activities immediately upon request.

By using our consultants as an addition to your resources, you don't have to worry about personal shortage during sick leave, maternity leave or changes in project scopes requiring quick adaptation in level of tasks and coordination.

Local Knowledge with Global Reach

Nomeco CTSM delivers first class support to clinical trials conducted at all levels: From the smallest biotech pioneers to some of the world's largest CROs and pharmaceutical companies. We offer solutions fitted to each customer which make life easier for site personnel, study managers and CRAs in handling clinical trial supply materials.

Nomeco CTSM is your international clinical trial supply partner with a comprehensive local knowledge and global reach. We assist our customers in conducting clinical trials in all phases with our specialized knowledge and understanding of the legislation and quality requirements in Europe.

More than 70 active studies
More than 20 countries
Temperature controlled shipments
Controlled drug importation to Denmark

Flexible Consultancy Solutions

Nomeco CTSM also offers flexible consultancy services within clinical trial supply on an ad hoc, part time and full time basis. Our highly experienced staff will add specialized knowledge to your team and release internal resources. We will contribute and take over

Nomeco Clinical Trial Supply Services

- Consultancy
- Clinical Trial Supply Optimisation
- Randomisation
- IWRS Setup and Testing
- Label Design and Production
- GMP Packaging & Labelling
- GDP Storage and Distribution
- Comparator sourcing
- Return and Destruction

Further Information: www.CTSM.dk

SUCCESS BY COOPERATION



As a prerequisite of an optimised supply of patients, pharmacies need access to all pharmaceutical and health products at all time. This goal can only be accomplished if pharmaceutical manufacturers and wholesalers, like the German market leader PHOENIX, work in close collaboration with companies like TEVA/ratiopharm.



As the market leading wholesaler in Germany, PHOENIX is doing its part in full extent to fulfil this prerequisite in close collaboration with the industry.

In our supply chain projects, we focus on transferring our transactional partnerships with manufacturers into a **strategical partnership**. To do so, we mutually approach the complex issues by working along the three dimensions of supply chain management (see picture at the bottom of the page): Information flow, materials flow, demand and inventory planning.

To our mind, a good cooperation is based on trust and leads to positive results for everyone. Hence, in our workshops with manufacturers we aim to identify a set of short-term to long-term initiatives from which both sides benefit already right from the beginning. *"We create a win-win-situation for both partners based on the intensive collaboration, enabling us to better supply patients"*, says Bernhard Kraska, Senior Manager Key Account Wholesalers at TEVA/ratiopharm.

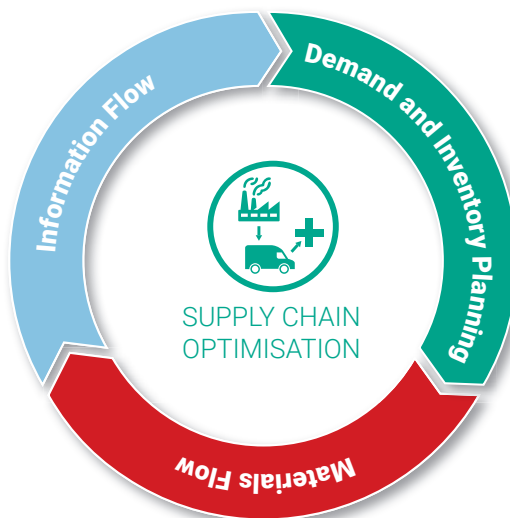
Last year we already started **more than ten supply chain projects** with manufacturers of all areas in the healthcare sector. In these projects, we could reduce delivery defects and accelerate order picking by a joint analysis of order patterns and rounding to enhance ordering of original containers. We avoided peak



Successful workshop TEVA/ratiopharm and PHOENIX: (From left to right) Reiner Hofmann (PHOENIX), Bernhard Kraska, Berthold Kohn, Gerhard Röder, Corina Jordan (all TEVA/ratiopharm), Frank Schäfer, Dr. Christoph Markmann, Christian Waldenmaier (all PHOENIX).

workloads on both sides around holidays or upcoming rebate contracts by mutually developing optimal ordering schedules. Moreover, together we also targeted long-term initiatives like the electronic exchange of invoices and delivery notes which significantly lower the workload on both sides and accelerate product availability for the pharmacies.

The positive feedback of our partners and the visible success in the daily business motivates us to approach a lot of new projects with manufacturers in the year 2017.



STRONG COMBINATION



Around 200 participants from 65 different companies collaborating with PHOENIX, our own pharmacies BENU and the cooperation programs PharmaPoint and Partner (both members of the European PHOENIX Pharmacy Partnership) joined the first combined annual meeting from the Czech Republic and Slovakia to showcase their options and new opportunities on the market .



Petr Doležal, Managing Director of PHOENIX in Czech Republic and Slovakia, speaks at the event.



Almost 200 people followed the invitation to the joint meeting of PHOENIX Czech Republic and Slovakia.

PHOENIX is not just a successful wholesaler, but an European healthcare provider with a broad service portfolio for our industry partners. This was the underlying message for the annual manufacturers meeting on 25th October 2016 at the Clarion Congress Hotel in Prague. *"In order to show that the Czech and Slovak market can co-operate very closely and that such a co-operation brings many benefits for producers too, we decided that for the first time, the meeting with suppliers of the pharmaceutical industry takes place jointly for the Czech Republic and Slovakia",* says Petr Doležal, Managing Director of PHOENIX in the Czech Republic and Slovakia.

Each presentation in the day-long event highlighted the main areas where PHOENIX and our industry partners can grow together – in all fields from

wholesale and healthcare logistics to services. Almost 200 partners participated in the meeting. The speakers emphasized that PHOENIX is also thinking about the future. They referred to gaps in the pharmaceutical market which represent new opportunities for PHOENIX and for the industry as well as building up their market presence together. *"Our stable position in the Czech Republic and Slovakia makes us a strong player",* Petr Doležal states proudly. *"It was very important for us to show our business partners the force we have thanks to the connection of both markets."*

With our own BENU pharmacies, and pharmacies in the cooperations PharmaPoint (CZ) and Partner (SK), both members of the European PHOENIX Pharmacy Partnership, PHOENIX has access to a huge number of pharmacies in the these countries.



TAMRO BALTICS



Tamro Baltics, the PHOENIX group company in the Baltic countries Estonia, Latvia and Lithuania, has a strong presence and high expertise in the region. More than 300 representatives of manufacturers joined the Tamro Baltics Annual Business Brunch in November 2016.

A joint team from Wholesale, Retail and Pharma Services of Tamro Baltics invited manufacturer's and partner's representatives to a business brunch in Tallin (Estonia), Riga (Latvia) and Vilnius (Lithuania) on three consecutive days from 8th to 10th November 2016. Tamro Baltics leaders presented the most recent developments as well as future potential and challenges.

In all three countries, PHOENIX group CEO Oliver Windholz greeted the guests with a recorded video message. Guest speaker Paulien Schul, Head of Patient Services of PHOENIX group (see picture bottom left), introduced new initiatives and achievements in different European markets. The event was hosted by Tamro Baltics Managing director Leon Jankelevitsh and supported by Retail

Director Baltics Dr. Max Schwesig as well as local and pan-Baltic executives. In addition to the presentations, the guests were offered the opportunity to participate in the event through interactive polls regarding local market growths prognosis in 2017, ratings on in-store positions and much more.

The majority of the guests rated the event extremely valuable regarding both content and organisation. *"It was meaningful, unique and very well prepared",* says Audrius Tutlys, Country Manager TEVA Lithuania and one of the guests. *"The event created an undisputable value to the whole community of manufacturer's and partner's representatives in the Baltics."*

The Tamro Baltics Annual Business Brunch was a great occasion for exchange and discussion.



New modern Distribution Centre opened in Riga, Latvia

The new premises are centrally located in a suburb of Riga, only 11 kilometres from the city centre with fast access to the E67 road connecting Helsinki and Prague, the so called "Via Baltica".

With the opening of the new distribution centre, Tamro Baltics has significantly improved the quality of the service offerings in Latvia and strengthened the position of well-balanced pharmaceutical service provider in the Baltic region offering country based and regional solutions for pharmaceutical industry.



Total space of the new warehouse occupies **7.100 square meters**, the high bay narrow aisle six pallet level warehouse has **4.500 pallets storage capacity** for various types of medicines: cold chain, controlled medicines, clinical trials, etc. The warehouse is equipped with modern wire guided narrow aisle forklifts and order picking equipment. More than 9.000 picking locations and conveyor line for high efficiency picking process is implemented. Modern video surveillance systems, temperature and humidity monitoring systems have been designed adapting the best practice of our pharma customers.

COUNTRY UPDATES

PHOENIX group has an unparalleled coverage in Europe, being present in 26 countries with around 120 million patient contacts in more than 14,000 pharmacies, both in ownership and within the PHOENIX Pharmacy Network. These "country updates" will give you short news from the PHOENIX group countries.

Nomeco Denmark

New warehouse construction going well



The new warehouse near Copenhagen will unite Nomeco's three current healthcare logistics warehouses in one giant modern facility south of Copenhagen. The first sod was turned in the beginning of November and soon the 30 meters tall high-bay will be the visible proof.

"We will set new standards in quality; our new warehouse will contain pharmaceuticals worth billions from some of the world's most research-intensive and demanding global pharmaceutical companies. Ultimately critically ill patients all over Scandinavia will depend on our storage facilities in Køge which is why we aim at the highest possible quality standards," says Nomeco's Managing Director Henrik Kaastrup.

Tamro Sweden

Round table meetings with industry



On two occasions each year, Tamro Sweden keeps recurring discussion meetings with our industry partners. Tamro calls these meetings "round table meetings" since they are unique and somehow intimate. The topics discussed are current developments of interest for the industry and for the market, but also what is happening at Tamro. The events are run by Lars Schenatz, Managing Director, normally accompanied by Pontus Moberg, General Counsel. Each round table meeting gathers around thirty principals in total. At the last meeting, we discussed the Governmental official report of the pharmacy market, news from Tamro, and what happens with DTP (Direct to Pharmacy) in the future. The next round table meeting will take place this spring in Stockholm.

Popular External Quality Network lead by Tamro

The Quality Department of Tamro Sweden regularly invites our industry partners as well as pharmacies to a popular "Quality Network Meeting" to discuss important quality topics. The meeting is held twice a year and usually attracts approximately 30 key quality persons from different companies. At the previous meeting in October 2016, the main topic of the Quality Network was logistics. Big companies like Teva, Roche, MSD and Bayer participated in the meeting. Other topics in this Quality Network have been cold chain product management, Quality Agreements, E-verification, Updated GDP regulations etc. More information about the Quality Network: Åsa Brümmer, Quality Director, asa.brummer@tamro.com.

PHOENIX in UK

Patientfirst at Rowlands Pharmacy



Across the EU there are almost 200,000 deaths each year due to missed doses of medication, in the UK up to 50 % of patients with long term conditions don't take their medicines as prescribed. Rowlands Pharmacy, PHOENIX UK's owned retail pharmacy chain, has launched its **Patientfirst medicines adherence initiative**. Patientfirst involves the proactive delivery of patient centred interventions by pharmacy teams throughout the Rowlands estate. This provides an opportunity to deliver key product messages to patients. Patient level data can then be utilised to demonstrate the impact of these interventions and support manufacturer KPI's. More information: Leah Davies, ldavies@rowlandspharmacy.co.uk.

