Produire notre Recherche en France
en s'appuyant sur et en fédérant son écosystème de recherche

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Servier Global Head of R&D Strategy, Portfolio, Execution, and Excellence Department
VP Grand Group & ETI MEDICEN
Servier Sustainability Strategy & Governance Director as of 1rst of October, 2025

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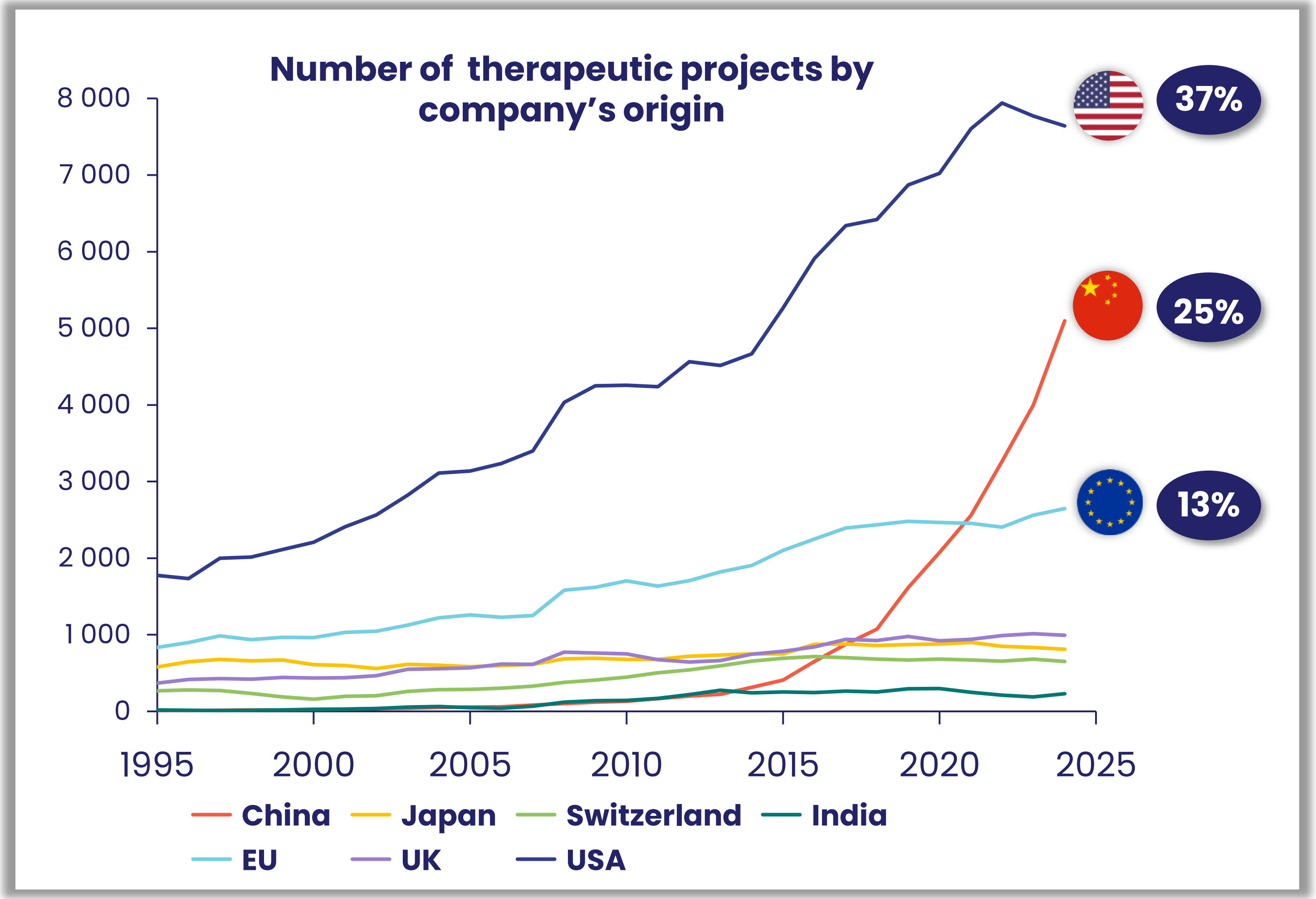
moved by you

R&D Investments: pressure from China & US

Innovation surge & is dominated by 3 key players – USA, China & Eu



- **3 regions** cover **75% of the total pharma** pipeline in 2024
- **USA** continue to lead the concentration of pharmaceutical innovation
- **China grow fast since 2010,** moving from **me-too › me better › first in class** product reaching **25% of pharma pipeline**
- **Europe,** despite challenged remain a **key region for innovation**

Source: Pharmaproject & CCI analysis

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Drug development is a more and more long and pricely process

Between 2013 and 2022, development costs for a new drug have risen by 60%, while expected annual revenues have fallen by 50%

Clinical development

Exploratory research → Pre clinical tests → Phase I → Phase II → Phase III → Approval → Marketing Pharmaco-vigilance

10,000 molecules

100 molecules

10 molecules

1 drug

20 years Patent expiry

15 years

7% success rate

899 M US Dollars

« The R&D cost of a new medicine » Jorge Mestre-Ferrandiz et al. OHE Dec 2012
[The R&D Cost of a New Medicine - OHE]

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Europe stands as the 2nd strongest cluster in the biotechnology global landscape after the US

European biotech industry

- Ranked **2nd** biotech cluster worldwide only to the US
- France, Germany, the United Kingdom, the Netherlands, Sweden as representatives
- Home to many **large-sized pharma** and device companies
- **With high startup density**, 90% of European biotech being SMEs
- Leading **biotech hubs**:
  Cambridge (UK), Basel (Switzerland), Paris-Saclay (France), Munich (Germany), and Stockholm/Uppsala (Sweden)

Roche | NOVARTIS | sanofi | GSK | AstraZeneca
novo nordisk | Bayer | MERCK | SERVIER

Sources: consolidated analyses of Cushman & Wakefield analysis, IQVIA, PhiRDA

SME = Small and Medium-sized Enterprises

Europe has one of the most fertile soils for biotechnology innovation and growth

World-class universities

43 of the top 100 life-science universities are located in Europe as of 2025

Academic outputs

2x publication output in Europe compared with the US, **3x** compared with China

Collaborative Research network

e.g. European Research Area (ERA) plan, Erasmus+ plan, Helmholtz Association…

Policy endorsement

Horizon Europe at the EU level, Germany's Bioeconomy 2030, France's Future Investment Plan…

Diversified (early) funding sources

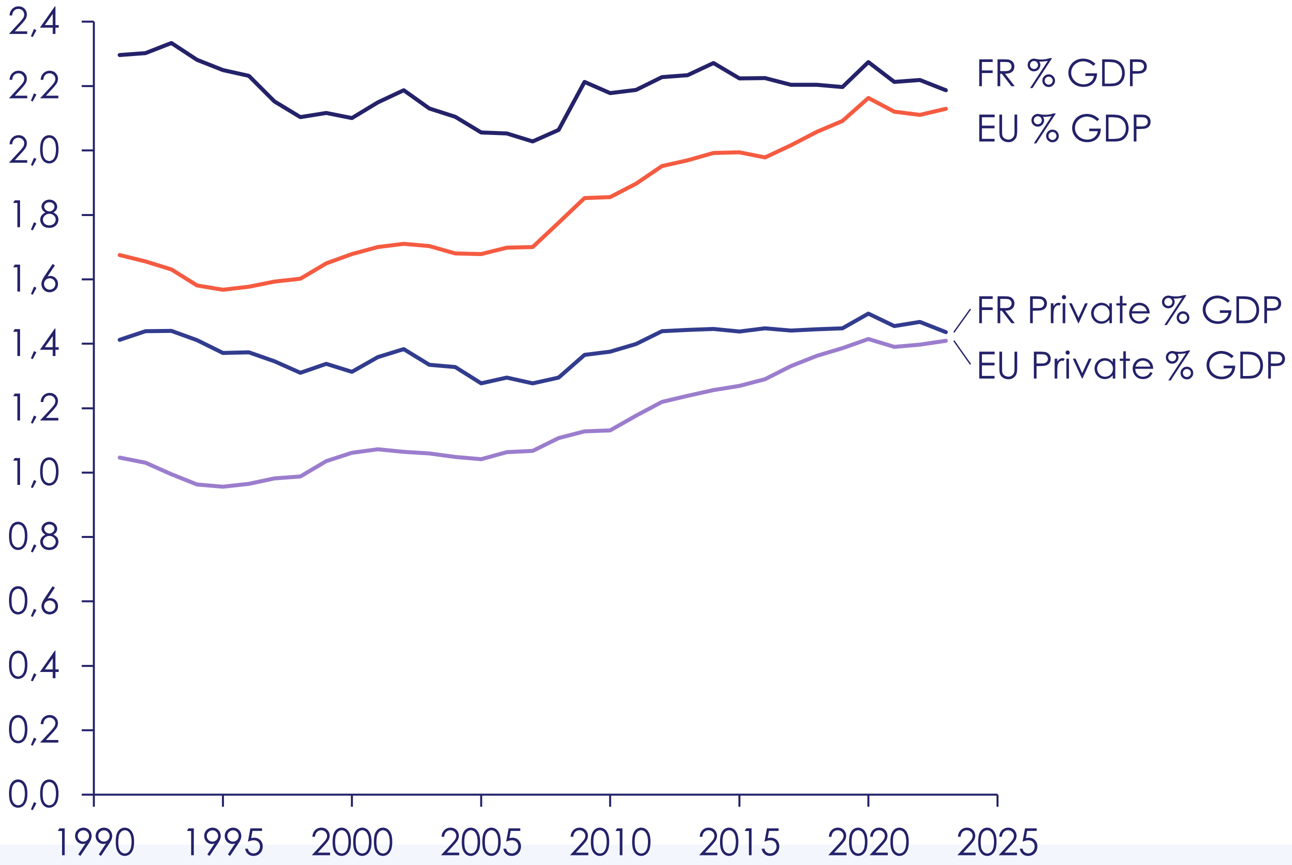
Efficient VC and early fundings, e.g. BPI France, IHI initiatives, PPP…

Strong patent protection

>40,000 patents granted in biotech in Europe since 2015, as of 1/4 of worldwide

Sources: consolidated analyses of McKinsey, Panorama France Biotech 2024, Coface Economic publications, EFPIA

R&D efforts in EU and France global & from private sector



European target for R&D investment (2020)

3%

Investment levels **in France** **stagnate** **at around 2.2%**

OECD data

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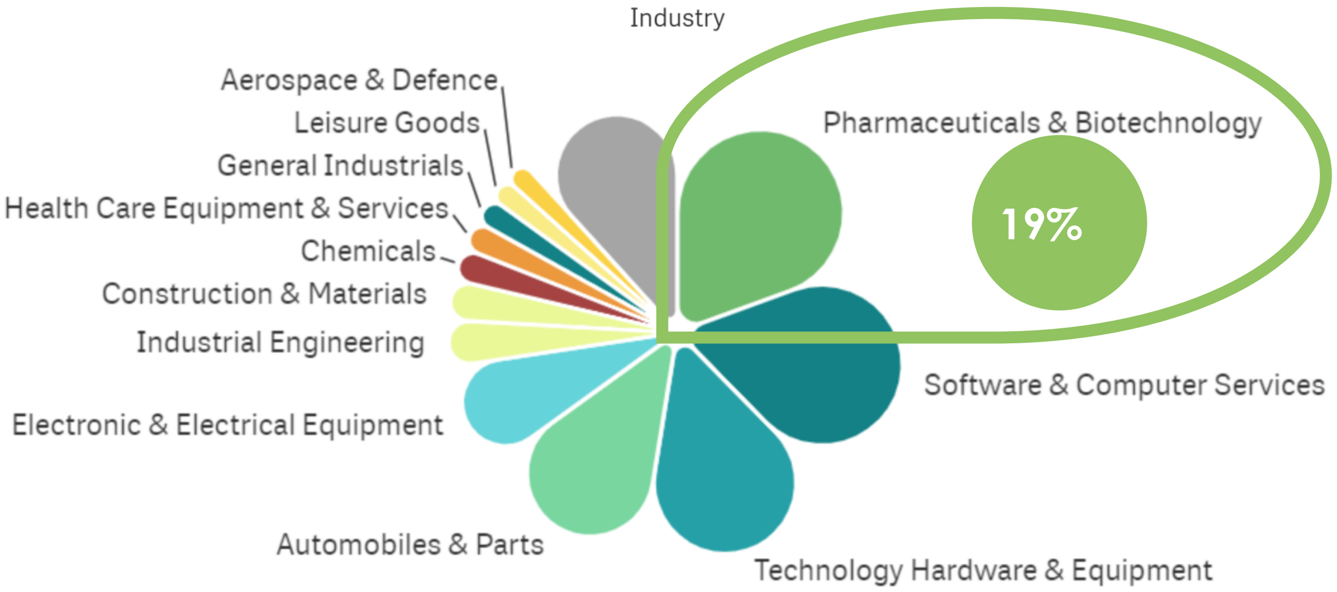
Pharma & Biotech:
On top of worldwide private investment

Among 2,500 companies WW

Companies by main industrial sector of activity.



In France:
pharma & biotech sector represent **26,8%** of private sector investment

OCDE classification 2022

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Panorama des principaux acteurs de l'innovation en santé en Île-de-France

Institutionnels

- Ministère de l'Enseignement Supérieur, de la Recherche et de l'Innovation
- Ministère des Solidarités et de la Santé
- Ministère de l'Économie, des Finances et de la Relance
- Région îledeFrance
- DGE – Direction Générale des Entreprises
- Union Européenne
- France 2030 – Agence de l'Innovation en Santé

Financements publics

- bpifrance
- horizon europe
- anr

Investisseurs phares

- bpifrance
- Angels santé
- Sofinnova partners
- Kurma Partners
- EURAZEO
- Jeito

Entreprises de transfert de technologie

- SATT Lutech
- SATT Paris-Saclay – Innovating with confidence
- ERGANEO – L'avenir est fait d'audace

Technology Transfer Offices

- InsermTransfert – Your partner in health innovation
- CNRS Innovation
- cea tech

Associations professionnelles

- Le dispositif médical snitem – Pour faire avancer la santé
- leem – les entreprises du médicament
- numeum – Engager le numérique
- ariis – Alliance Recherche & Innovation Industries Santé
- france biotech
- L'Institut Paris Region
- CCI Paris Ile-de-France
- Choose Paris Region

Incubateurs et accélérateurs

- Agoranov
- Hôtel Dieu
- Bio²Jump – L'accélérateur des pépites Biothérapies x Bioproduction
- Incub Alliance Paris-Saclay
- La French Tech
- Future 4 Care
- Genopole
- Paris&Co
- Paris Biotech Santé
- iPEPS The Healthtech Hub – Institut du Cerveau
- WILCO
- STATION F

Business centers

- Paris Santé Cochin
- KADANS Science Partner
- Spartners by Servier & BioLabs
- Genopole
- Paris-Saclay Cancer Cluster
- PariSanté campus
- Biocitech
- DocCity
- Villejuif Biopark
- Vallée Sud Bio Parc Grand Paris
- Bio & D – Pépinière et hôtel d'entreprises – Créteil – Plaine centrale : en pleine santé!

Pôles / Clusters

- Systematic – Paris Region Deep Tech Ecosystem
- cap digital
- Polepharma
- Genopole
- Medicen Paris Region
- Brain & Mind
- Paris-Saclay Cancer Cluster
- AMI Biocluster GenoTher

Organismes de recherche

- Institut Pasteur
- cnrs
- Institut Curie
- Assistance Publique Hôpitaux de Paris
- Inserm
- Gustave Roussy – Cancer Campus Grand Paris
- Institut du Cerveau – ICM
- Généthon – Innover pour guérir
- cea

Double funding for public health research
PSCC: an industrial CLUSTER around Gustave Roussy

PSCC as a catalyst to accelerate innovation against cancer

Nurturing an ecosystem	Catalysing scientific connexions	Providing an attractive site	Supporting promising projects
Offering access to expertise and talents	Facilitating access to RW data	Developing innovative platforms	Attracting financing

Facilitating connections between ecosystem stakeholders

PSCC Board of trustees

Gustave Roussy – Cancer Campus Grand Paris
Institut Polytechnique de Paris
Inserm – La science pour la santé – From science to health
sanofi
université Paris-Saclay
institut Curie
unicancer
Assistance Publique – Hôpitaux de Paris
Merck
Servier – moved by you
innate pharma
Villejuif – Tout cède à notre union
Région ÎledeFrance

PSCC Connect : economic players in oncology

Large Cap

Takeda
sanofi
IPSEN – Innovation for patient care
Servier – moved by you

Investors

Sofinnova Partners – For Life
G/
Jeito
andera partners
bioqube ventures
Angels santé

Mid and Small Cap

Abbelight, ABCB Biopharm, Abcely, NK Diagnostics, Occlugel, Odimma, ANALOGIES, Apmonia Therapeutics, AQEMIA, Okomera, Oncodesign PM, Orakl, Blue Bees, Brenus Pharma, Pegascy, Pepkon, Persea, CURE51, EMGLEV, e-miRgency, Promontory, Proskope, Prostperia, ErVimmune, EverImmune, GIMLI, QUINTEN, Resilience, Rosetta, HEPHAISTOS, Hippoxis, Imaginostics, Serendip, SMARTCATCH, SurTouch, Innate Pharma, IntegraGen, Invectys, THERANOVIR, Theraonco, TheraSonic, Jalon Therapeutics, MAGIC GENOMIX, Fasten, ASQII, Telomium, McSAF, MIO, MPC Therapeutics, QALITA, MSInsight, MUSIC CARE, MYPL, NeoVentures

Research support

Agilent Technologies, Alésia Consulting, XenTech, KADANS, Parean Biotech, Alter Ego biotech, Biognosys, BIOPHACT, Firalis MP, ANTINEO, VOXCAN SAS, BiotechStudio, CliniSciences, Cytiva, ULTRACE DP, JPT Peptide, PL-Conseil, ERBC, EXPLICYTE, FIDAL, HMC Matching, NOVAXIA, BIOTEM, ICOSA, Iktos, ILife Consulting, APICES SOLUCIONES S.L, Thermo Fisher Scientific, Illumina, KYomed INNOV, Lab2BIOTECH, Stilla Technologies, Promega Fr., SEQALIS, Lipomize SRL, Medexprim, Merck S.A. C., ONCOFACTORY, Oncodesign services, Mission Bio, Nuvisan

Networking institutions

TECHNOFOUNDERS
MATWIN
MEDICEN
CCI Val-de-Marne Paris Ile-de-France
WILCO
france biotech

PSCC Patient Committee

Imagine for Margo – Children without Cancer
Europa Donna – The European Breast Cancer Coalition
Patients en réseau
les seintinelles – contre le cancer, tous volontaires
Mélanome France
Aïda
Jade
Geeps Cancer
arc – Fondation ARC pour la recherche sur le cancer
La Niaque l'asso
Les Enfants de Curie
ANAMACaP
Cancer Contribution
Laurette Fugain

PSCC Partners

ITCC – Innovative Therapies for Children with Cancer
eit Health
KADANS Science Partner
Bart Patriarche.
SADEV 94
MEDICEN Paris Région
MATWIN – Maturation & Accelerating Translation with Industry
PERELIS – European Life Sciences Real Estate
Amundi Asset Management | Immobilier
CCI Val-de-Marne Paris Ile-de-France

DISCOVER SERVIER

An independent, global pharmaceutical group

LONG-TERM VISION
Governed by a **non-profit foundation**

OPEN & AGILE
Partner-first **mindset** to create value

SCIENCE-DRIVEN
Precision medicine at the core of our approach

EXPERIENCED TEAM
with **global R&D and manufacturing operations**

Committed to therapeutic progress to serve PATIENT NEEDS

3
THERAPEUTIC AREAS
Oncology, CMVD, Neurology
21800 employees WW

4
RESEARCH CENTERS
France, United-States, Denmark and Hungary

15
CLINICAL DEVELOPMENT CENTERS
Europe, America, Middle East and Asia

14
PRODUCTION SITES
Europe, Middle East, America and Asia

Servier rooted in France governed by a Fondation

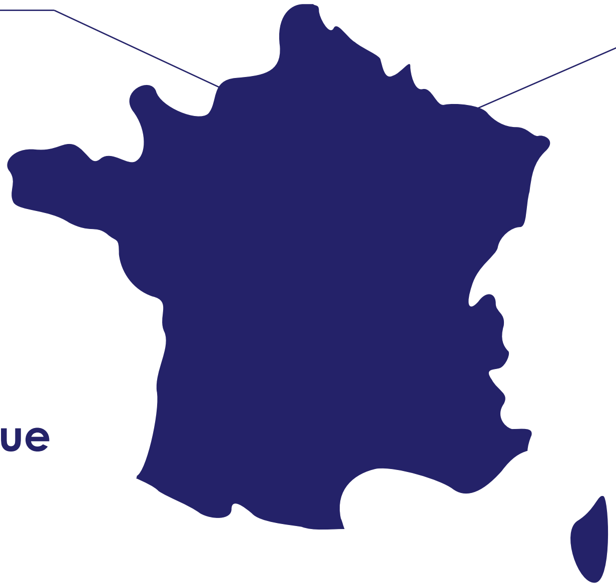
95+% of sales out of France

100% of Industrial Development in France
chemistry - pharmaceutical - biologics

BOLBEC BACLAIR – Normandy

98% of active ingredients
of Group brand-name medicines
synthetized

Over 20% of brand-name revenue
invested in R&D each year



GIDY – Centre Val de Loire

Investment of €85m to
develop the biomedicine
sector in France: BioS,
creation of 65 direct jobs

Our R&D campus at Saclay

15

Academic ranking
of World universities

MOVING R&D employees
& business partners
Feb to May 2023

Since the opening
> 1 500 visitors
40% from the ecosystem

4 start-up joined
our incubator Spartners

Spartners
by Servier & BioLabs

SERVIER